Creating Checklists

For more information about Checklists go to Help>Tutorial Videos>[3.09] Personnel-Create Checklists

All three types of checklists are constructed the same way.

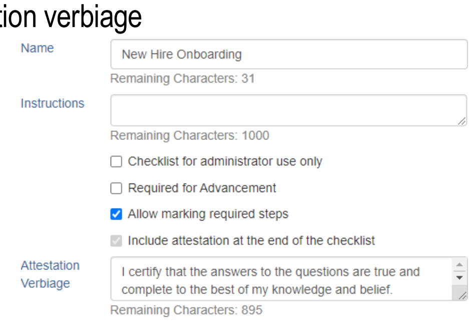
1. Go to ***Personnel*** > *Checklists* > *Select* ***Onboarding, Advancement or Rotation***
2. Click **New**
3. Enter a Name and Instructions
4. Check the 'Checklist for Administrator Only' box if this checklist will only be viewed and used by administrators. If this box is checked, the residents/fellows will not see this checklist.
5. Check the 'Required for Advancement' box if residents must complete this checklist by the due date in order to advance to the next level of their training (status and PGY level).

You can set due dates when distributing checklists.

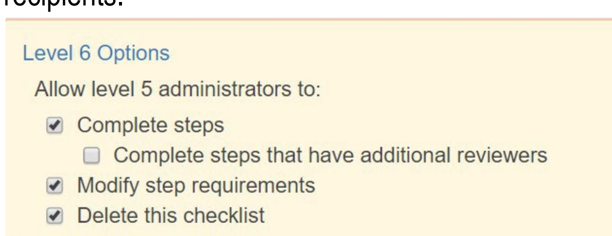
Caution: If you use this feature and a resident or fellow does not advance because of it, their status on the Block Schedule will not advance and the old status will be displayed. This means:

- When evaluations are created, the old status will be used and the resident or fellow will fall within the peer group of the old status
- When conference rosters are built, the old status will be used, not the new status

6. Check 'Allow marking required steps' to pick which steps should be required for residents to complete
    - Checking this option will automatically check 'Include attestation at the end of the checklist'
7. Check 'Include attestation at the end of the checklist' for residents to authenticate the information they provided (after all steps are either in Complete or Pending status)
    - Customize the attestation verbiage



8. If you are a Level 6 you have these options:
    - Click ***Level 6 options***
    - Limit what an L5 administrator can do with a checklist. Check which options you'd like to limit. Even with the boxes *unchecked*, L5 administrators can still view uploaded files, edit text boxes and return steps to recipients.



9. Click **Save Checklist Settings**
    - When you create your checklist, you have the option to create a brand-new step or to add an existing step.