Unite Education Program v6.5
Job Aid: 5703

Set Up an Application Verification Checklist

For each FlexApp you add to Unite, you have the option of setting up a verification checklist using checklist items that have been added to Unite. If you need to add a checklist item to Unite, there are two main parts to setting up an application verification checklist for a FlexApp. If the checklist items you need have already been added to Unite, you can skip Part 1 and add verification checklist items to the FlexApp.

Part 1: Add verification checklist items to Unite

1. Open a browser and log on to Unite.

2. Click and expand your username to display the system configuration menu.

3. Click **Global Settings**.

4. Click the *Verification Checklist* tab.

5. Click **Add New** .

6. In the **Checklist Item Name** text box, enter a name for the item.

Note

   An item can be a document, a task such as "conduct phone interview," or any other thing that could be important for an application to be considered complete.

7. If you want to connect the item to a field on the person record or application record, select the field from the **Connected To** list box.

> **Note**
>
> You can connect items to fields so that when an update is made to the field or an item is checked off, Unite updates the *Application Verification* page as well as the field on the record.

8. Click **Add** .

> **Note**
>
> If you add an item in error, you can delete the item as long as the item has not been added to the verification checklist for a FlexApp.

9. Click **Save** .

10. Click **X** to close the *LSAC Unite Setup* page.

Part 2: Add verification checklist items to the FlexApp

1. On the main menu, click UTILITIES.

2. Click the *Form Design* tab.

3. Verify you are on the *Flex App* grid.

4. In the **Name** column, click the name of the application you want to open. Otherwise, click **+ Add** to add a new FlexApp to Unite.

> **Note**
>
> The application must be within the current term and year to make updates.

5. Verify you are on the *Settings* tab.

6. Click and expand the *Application Verification Checklist* section.

7. Click **Edit** .

8. In the *Checklist Items* box, select the check box next to each item you want to add.

> **Note**
>
> If you want to add all items, select the **Checklist Items** check box.

9. Click **Add** .

10. In the *Selected Items* box, drag and drop items in the order you want them to display on the *Application Verification* page.

11. If you want to make an item required, click **Edit** for the item. Select **Yes** for **Required**. Then click **Update** .

> **Note**
>
> A red asterisk displays next to each required item on the *Application Verification* page to remind Unite users of important items.

12. Click **Save** .

13. Click **X** to close the *Edit Flex App* window.

Related resources

- 4034 – About Application Verification

- 5712 – Considerations for Application Verification Checklists

- 5201 – Verify an Application Using a Checklist