Unite Education Program v10.0
Job Aid: ASO7

Configure Unite Applicant Status Online (ASO) Requirements Checklist Section

The Requirements Checklist section allows you to configure a list of required elements that inform the applicants of what items are completed and what items are missing. If the requirements for an item are met, Unite displays an active checkbox. If all requirements for an item are not met, Unite displays an inactive (non-checked) checkbox.

There are multiple options for checklists. You can build a default checklist for all applicants to see. In addition, you can build specific for admitted applicants. Checklists can also be built based on the applicant type or the degree applied.

You can modify the Requirements Checklist section name as well as change its text and background colors.
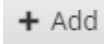
To edit the Requirements Checklist section and set up a default checklist

1. Open a browser and log on to Unite.

2. Click **UTILITIES**.

3. Click the *Form Design* tab.

4. Click *Applicant Status Online*.

5. Expand the *Requirements Checklist* section.

6. Click **Edit**.

7. Enter a name in the Section Text field if you wish to change the name of this section.

8. Choose the colors for the Section Text Color and the Section Background Color. You can select the color from the color panel. In addition, you can enter in either the RBG or the

Hexadecimal (Hex) code to set your desired color. Use ♦ to toggle the RGB and Hex codes.

9. Click the *Default* checklist name.

10. Verify you have chosen the *Initial* radio button to create a checklist for all applicants. This is the default checklist. Its name cannot be changed.

11. Each checklist item must be defined individually. Click **+ Add** to add the first checklist item.

12. In the Item Name text box, enter the name of the checklist item. This is how this item will appear to the applicants. The item name allows up to 50 characters. An example could be *LSAC CAS Report Received*.

13. Specify the item's condition filter.   Locate the field to filter. Use a keyword search to find the field by typing in the Search Available textbox.

14. Select the field. By clicking on its checkbox.

15. Click **Add Field** .

16. Define the conditions for that field. You can add more fields and conditions as needed.

17. Click **Save** .

18. Repeat Steps 11-17 to create each additional checklist item for the initial checklist.

To set up a default Admitted Student Checklist

1. Verify you have chosen the *Admitted* radio button to create a checklist for all applicants with the export decision Admitted and greater such as Deposit Paid and Matriculated. Since this is the default checklist. Its name cannot be changed.

2. Each checklist item must be defined individually. Click **+ Add** to add the first checklist item.

3. In the Item Name text box, enter the name of the checklist item. This is how this item will appear to the admitted applicants. The item name allows up to 50 characters. An example could be *Admitted Student Response Form*.

4. Specify the item's condition filter.   Locate the field to filter. Use a keyword search to find the field by typing in the Search Available textbox.

5. Select the field. By clicking on its checkbox.

6. Click **Add Field** .

7. Define the conditions for that field. You can add more fields and conditions as needed.

8. Click **Save** .

9. Repeat Steps 2-8 to create each additional checklist item for the Admitted Student checklist.

To set up additional Requirements Checklists

You can create specific checklists based on either the Applicant Type or the Degree Applied fields.

1. You can click **+ Add** to add a new Checklist or click the Copy icon to copy from an existing checklist.

2. Enter the Checklist Name. An example may be Transfer Checklist.

3. Specify the Condition Name by choosing either Applicant Type or Degree Applied.

4. Select the Condition Value.

5. Save the checklist before adding checklist items. Once saved, you can now add items to the checklist following steps 11-17 above for the initial checklist.

6. Click **Save** .

7. Click [^] to collapse the Requirements Checklist section.

Related Resources

- 5805 – About Field Options for Reports and Conditions