

RADIUS

Setting Up Checklists

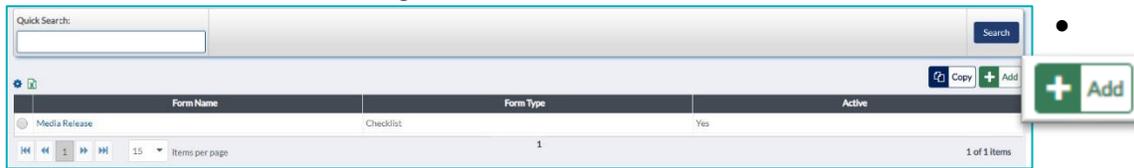
Setting Up Checklists

Checklists can be used as part of the Enrollment/Re-Enrollment process. There is a three step process to associate a checklist item with a contract:

1. [Create/Edit an enrollment form](#)
2. [Link the form to a master checklist item](#)
3. [Associate the checklist item to an Enrollment Year](#)

1. CREATE / EDIT AN ENROLLMENT FORM (Home | Setup | Enrollment Forms)

- Select Add button to create a new form
 - To edit an existing form click on Form Name from the list

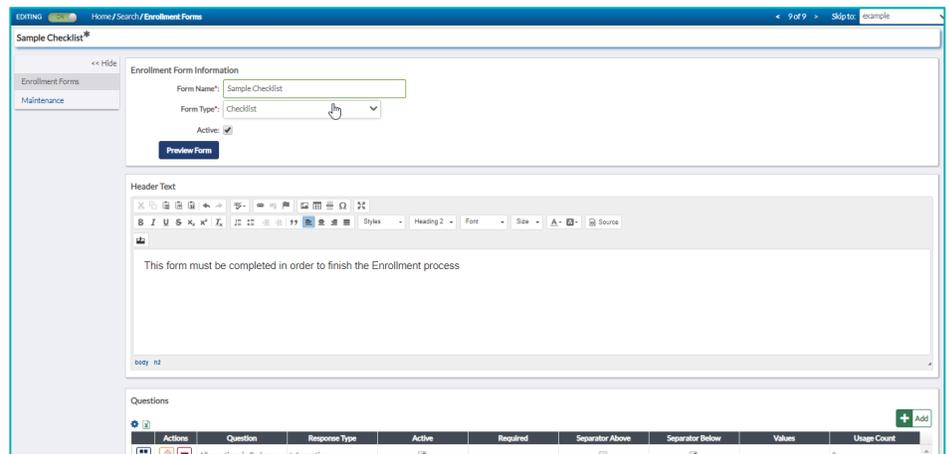


- Set Editing button to ON mode



Form Information

- Add Form Name
- Add Form Type = Checklist
- Select Active button
- Select Preview Form as you build the form



Header Text

- Add instructions

Questions

- Use Add button to add questions



- Use Arrange icon to move a question up or down in the list order



Actions	Question	Response Type	Active	Required	Separator Above	Separator Below	Values	Usage Count
	All questions in Red are r...	Information	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		0
	In 200 words or less plea...	Textarea	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		0
	Please indicate if you are...	Checkbox	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		0
	Please choose conference...	Date picker	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		0
	Are you interested in bre...	Dropdown list	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Yes, No	0
	Please list any food allerg...	Textbox	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		0
	Help us get to know your...	Likert	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Every day, 3-4 days per ...	0
	Rate the top ten lunch m...	Rating table	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Pizza, Meatball sub, Tuna...	0
	Please upload a recent fa...	Upload control	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		0

- Use Pencil icon to edit a question



- Use Delete icon to remove a question



Footer Text

- Add contact info if applicable

Building a Question

- Response Type field is required (See below for more details)
- Question field is required
- Select Required checkbox if the form must be submitted to consider enrollment process complete
- Separator is a thin grey rule used to define blocks of content
- Options will vary depending on Response Type selected. See examples below.

- Dropdown list will require adding menu items to appear in dropdown list.

The screenshot shows the 'Add/Edit Question' interface with two examples of question configurations.

Example 1: Dropdown list

- Response Type: Dropdown list
- Question*: May we include your son or daughter's name, and home
- Required:
- Separator Above:
- Separator Below:
- Options:

Value	
Yes	<input type="button" value="-"/>
No	<input type="button" value="-"/>
- * Drag rows up and down for custom order

Example 2: Likert chart

- Question: My child likes Math homework
- Allow only one response per row:
- Answers (Column value):

Answers (Column value)	
Every day	<input type="button" value="-"/>
3-4 days per week	<input type="button" value="-"/>
1-2 days per week	<input type="button" value="-"/>
Rarely	<input type="button" value="-"/>
- * Drag rows up and down for custom order

- **Likert charts** allow for making a selection based level of agreement with the Question

Preview Form View (Red = required questions)

- **Information:** is used to give an instruction, no response is collected.
- **Text Area:** Will display as multiline text box; intended for long paragraphs, i.e. essay. Set word or characters counts.
- **Checkbox**
- **Date picker**
- **Dropdown list**
- **Text Box:** Will display as single text box; intended for short answers. Set word or characters counts.
- **Likert**
- **Ratings Table**
- **Upload Control**

Preview Form
✕

All questions in Red are required.

In 200 words or less please explain why the ...

Please indicate if you are interested in an after school care

Please choose conference date

Are you interested in breakfast for your child?*

Please list any food allergies

Help us get to know your child*

	Every day	3-4 days per week	1-2 days per week	Rarely
My child likes being ready for school on time.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My child likes to read chapter books	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My child likes Math homework	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Rate the top ten lunch menu options

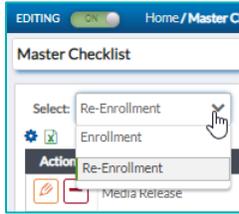
- Pizza ☆☆☆☆☆
- Meatball sub ☆☆☆☆☆
- Tuna sandwich ☆☆☆☆☆
- Salad Bar ☆☆☆☆☆
- PBJ ☆☆☆☆☆
- Grill Cheese ☆☆☆☆☆
- Mac & Cheese ☆☆☆☆☆
- Cheeseburger/Hamburger ☆☆☆☆☆
- Quiche ☆☆☆☆☆
- Fish Sandwich ☆☆☆☆☆

Please upload a recent family photo*

Select file: Drop the file here or No file chosen

Name	Size	Progress	Status	Actions

2. LINK FORM TO A MASTER CHECKLIST ITEM (Home | Setup | Master Checklist)



Master Checklists need to be set up for both Enrollment and Re-Enrollment.

- For our example we will add a checklist item to Re-enrollment

- Select Add button to create a Master Checklist item
 - To edit an existing checklist item click on Pencil icon next to Checklist Item
- Complete the Add Master Checklist Item fields in window
 - Add Checklist Item Name
 - Select Checklist form in Links To field
 - Select the a form be linked to checklist item in the Form field (forms should be created prior to this step see [step 1](#))
 - Media Category is set to Enrollment
 - Category is established in Administration | Code Table | Person Media Category
 - Ignore Set as Portrait (this is only used for student photo uploads)
 - Select Add another if applicable
 - Select Save or Cancel

A screenshot of the 'Add Master Checklist Item' form. The form has a dark blue header with the title 'Add Master Checklist Item' and a close button. The fields are: 'Checklist Item Name*' with the value 'Media Release'; 'Links To' with a dropdown menu showing 'Checklist Form'; 'Form*' with a dropdown menu showing 'Media Release'; 'Media Category' with a dropdown menu showing 'Enrollment'; and 'Set As Portrait' with an unchecked checkbox. At the bottom right, there are three buttons: 'Add Another?' (unchecked), 'Save', and 'Cancel'.

From Master Checklist search screen the user can:

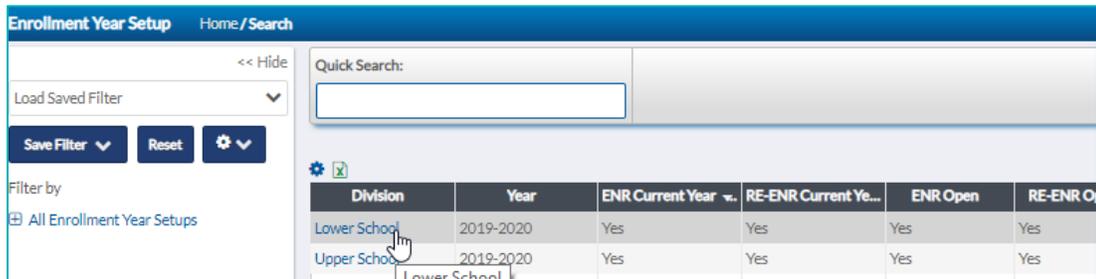
- Use the pencil icon to edit a checklist item name or re-link a new form
- Check OR uncheck Active box

- Delete a form that has a usage count of 0

3. ASSOCIATE A CHECKLIST ITEM WITH ENROLLMENT YEAR

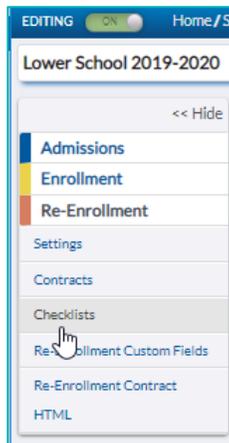
(Home | Setup | Enrollment Years)

- From the Enrollment Years Search screen select the Division in the year to be setup



The screenshot shows the 'Enrollment Year Setup' interface. It includes a search bar, filter options, and a table of enrollment years. The table has columns for Division, Year, ENR Current Year, RE-ENR Current Year, ENR Open, and RE-ENR Open. A hand cursor is pointing to the 'Lower School' row for the year 2019-2020.

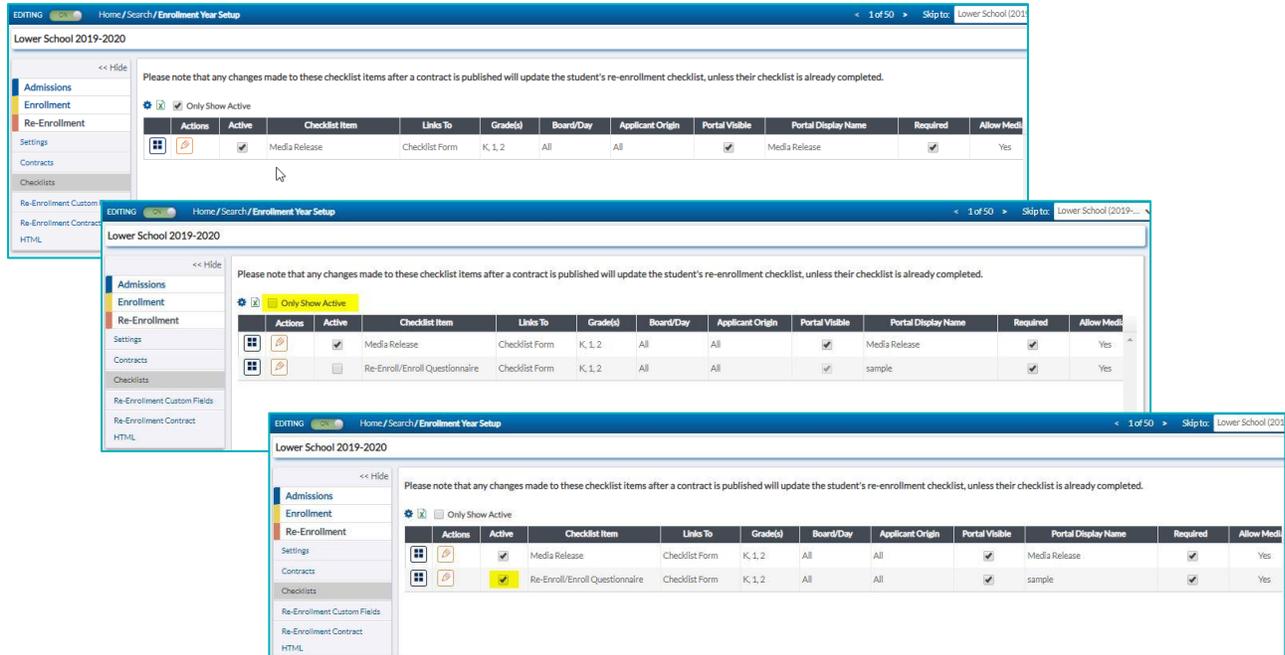
Division	Year	ENR Current Year	RE-ENR Current Year	ENR Open	RE-ENR Open
Lower School	2019-2020	Yes	Yes	Yes	Yes
Upper School	2019-2020	Yes	Yes	Yes	Yes
Lower School					



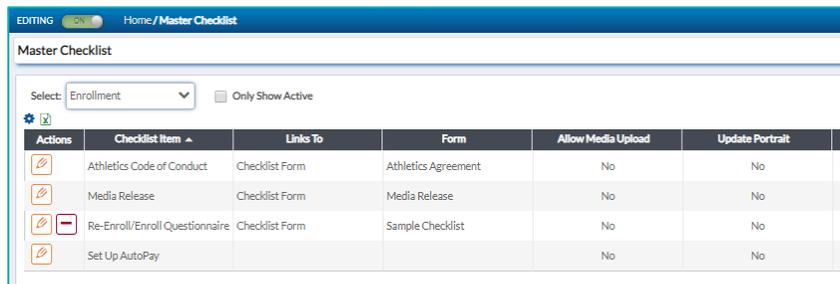
- Select Re-Enrollment
- Select Checklists from Re-Enrollment submenu

If you do not see your form:

- Verify that the form is active:
 - Deselect **Show Only Active** checkbox
 - Select the checkbox in the Active column next to form name



B. Verify that the form is associated with a checklist item in both Enrollment and Re-Enrollment:



Options for Checklists in Enrollment Years

- Use the Pencil Icon to edit a checklist item associated with a specific Division and Enrollment Year
 - Active flag
 - Portal Name: parent facing name (required)
 - Portal Description: add details if needed
 - Visible in Portal flag
 - Required flag
 - Grades: select grade specific years, or check all

Edit Checklist Item ✕

Checklist Item: Re-Enroll/Enroll Questionnaire

Links To: Checklist Form

Form: Sample Checklist

Active:

Portal Display Name*:

Portal Description:

Visible in Portal:

Required:

Grade(s):

International:

Board/Day:

Resource URL:

Resource File: No Media Selected

Re-Enrollment checklists for this year and division will be updated, unless the checklist is already completed.

Grade(s): 2 of 3 checked ▾

✓ Check All

✗ Uncheck All

K

✓ 1

✓ 2

- International options
- Board / Day options
- Resources URL: link the checklist to a URL (FACTS, school webpage, etc.)
- Resource File: add a PDF, medical form, etc.
- Select **Save** button when set up is complete

Grades(s): 2 of 3 checked

International: All

Board/Day: All

Resource URL: Enter a URL starting with http:// or https://

Resource File: No Media Selected

Re-Enrollment checklists for this year and division will be updated, unless the checklist is already completed.

Reminder: Checklists need to be set up every year:

- In each division
 - For Enrollment
 - For Re-Enrollment
-