

# How to Add Checklist Medical Documentation to Student's Account

- **Menu**
  - **Campus Community**
    - **Checklists**
      - **Person Checklist**
        - **Checklist Management Person**

## Checklist Management - Person

Enter any information you have and click Search. Leave fields blank for a list

[Find an Existing Value](#) [Add a New Value](#)

▼ **Search Criteria**

ID	begins with ▼	<input type="text"/>	
Sequence Number	= ▼	<input type="text"/>	
Administrative Function	begins with ▼	<input type="text"/>	
Checklist Code	begins with ▼	<input type="text"/>	
National ID	begins with ▼	<input type="text"/>	
Campus ID	begins with ▼	<input type="text"/>	
Last Name	begins with ▼	<input type="text"/>	
First Name	begins with ▼	<input type="text"/>	

Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

- 
- **Click on Add a New Value**
  - **Enter student's ID number**
    - **Hit enter**

## Checklist Management - Person

[Find an Existing Value](#) [Add a New Value](#)

\*ID

[Add](#)

•

- Enter Administrative Function or click on search tool to find (STRM) Student Term
  - Checklist Code (GRDAMW) GRAD/PROF MED/ADM
    - This is what it will look like

Checklist Date Time 09/26/2022 4:30:27PM Variable Data

\*Administrative Function   Student Term

\*Academic Institution

\*Checklist Code   GRAD/PROF MED/ADM

\*Status   Status Date 09/26/2022

Due Date

Due Amount  Currency Code

Comments

- Click on Variable Data
  - Enter Academic Career (Graduate)
    - Term
      - Click OK

Variable Data

Academic Career   Graduate

Term   Fall 2022

- Click Save

Checklist Date Time 09/26/2022 4:30:27PM Variable Data

\*Administrative Function   Student Term

\*Academic Institution

\*Checklist Code   GRAD/PROF MED/ADM

\*Status   Status Date 09/26/2022

Due Date

Due Amount  Currency Code

Comments

Checklist Management 1 | Checklist Management 2

**Checklist should now be added to the student's profile and either the graduate advisor or the student can go an upload the medical documentation from there.**

- To upload documents for student, go back to Checklist Management Person
  - Enter student's ID
    - Hit Search

### Checklist Management - Person

Enter any information you have and click Search. Leave fields blank for a list of all values.

▼ Search Criteria

ID

Sequence Number

Administrative Function

Checklist Code

National ID

Campus ID

Last Name

First Name

Case Sensitive

- Click on Checklist Management 2

Isabella Rose Rumbough ID 2058248 ★

Checklist Date Time: 09/26/2022 4:30:27PM

Administrative Function: Student Term Status: Initiated

Academic Institution: University of Houston Status Date: 09/26/2022

Checklist Code: GRAD/PROF MED/ADM Due Date: 01/03/2023

Checklist Item Table					
*Sequence	*Item		*Status	*Status Date	*Due Date
100	GRDAMW <input type="button" value="Q"/>	GRDAMW	Initiated <input type="button" value="v"/>	09/26/2022	01/03/2023

Responsible ID:  
Name: Jones, Tashemia V.

\*Category ID

\*Type ID

Document Uploaded 
Turn off PopUp Blocker before uploading file

- **Click on Okay (Make sure you are uploading a PDF)**

Checklist Date Time: 09/26/2022 4:30:27PM  
 Administrative Function: Student Term Status: Initiated  
 Academic Institution: University of Houston Status Date: 09/26/2022  
 Checklist Code: GRAD/PROF/MEDI/ADM Due Date: 01/03/2023

*Sequence	*Item	*Status	*Status Date	*Due Date
100	GRDAMW	Initiated	09/26/2022	01/03/2023

Responsible ID: 1165745 Name: Jones, Tashemia V.

\*Category ID:   
 \*Type ID:

Upload Document

Document Uploaded

Message

Please make sure PopUp Blocker is turned off  
 Document must be in .PDF format  
 (20000,163)

\* If you encounter an error when attempting to upload a file, please try again in approximately 10 minutes.

\* File name should not contain any invalid characters such as (\*:"<?>). Length of file name should be less than 30 characters. If you experience issues please shorten the length of your file name.

\*\* By submission, I certify that the information I have provided is complete and correct and I understand that the submission of false information is grounds for rejection of my application, withdrawal of any offer of acceptance, cancellation of enrollment and/or appropriate disciplinary action.

- **Click on Choose File, located the PDF, and Upload**

**File Attachment**

No file chosen

- **Beware of these error messages**

Message

Please make sure PopUp Blocker is turned off  
 Document must be in .PDF format  
 (20000,163)

\* If you encounter an error when attempting to upload a file, please try again in approximately 10 minutes.

\* File name should not contain any invalid characters such as (\*:"<?>). Length of file name should be less than 30 characters. If you experience issues please shorten the length of your file name.

\*\* By submission, I certify that the information I have provided is complete and correct and I understand that the submission of false information is grounds for rejection of my application, withdrawal of any offer of acceptance, cancellation of enrollment and/or appropriate disciplinary action.

- **After Uploading document, Click on View Document and verify it's there.**

*Sequence	*Item	*Status	*Status Date	*Due Date
100	GRDAMW	Initiated	09/26/2022	01/03/2023

Responsible ID: 1165745 Name: Jones, Tashemia V.

\*Category ID:   
 \*Type ID:

Upload Document

Document Uploaded  Turn off PopUp Blocker before uploading file

- **Click on Save, you will get an error message, just click OK**

Message

Data being added conflicts with existing data. (18,2)

When adding a new item to the database, the system found a conflicting item already exists.

This problem can happen if another user has entered similar information at the same time as you. Note the changes you have made, cancel the page, then retry your changes.

If the problem persists, it may be because of an application or other programming error and should be reported to technical support staff.

This error occurs when the keys on the record being inserted match a record that is already in the database. The application must ensure that each inserted record has unique keys.

- **Click on Return to Search**

**Checklist Item Table**

*Sequence	*Item	*Status	*Status Date	*Due Date
100	GRDAMW	Initiated	09/26/2022	01/03/2023

Responsible ID: 1165745      Name: Jones, Tashemia V.

\*Category ID

\*Type ID

    

Document Uploaded  Yes      Turn off PopUp Blocker before uploading file

    

- **Click No and you will return back to where you were, click on search results and you will see it is now in a received status**

Checklist Date Time: 09/26/2022 4:30:27PM

Administrative Function: Student Term      Status: Initiated

Academic Institution: University of Houston      Status Date: 09/26/2022

Checklist Code: GRAD/PROF MED/ADM      Due Date: 01/03/2023

**Checklist Item Table**

*Sequence	*Item	*Status	*Status Date	*Due Date
100	GRDAMW	Received	09/26/2022	01/03/2023

Responsible ID: 1165745      Name: Jones, Tashemia V.

\*Category ID

\*Type ID

    

Document Uploaded  Yes      Turn off PopUp Blocker before uploading file

    

**YOU ARE NOW DONE!**