Updating Checklists in PeopleSoft for Degree Clearance

The Registrar's office will create a checklist in PeopleSoft for the undergraduate degree candidates. The department is responsible for making sure that the student meets all the requirements for the major/minor(s). To indicate that the student has met these requirements the department representative will mark the checklist item status complete in PeopleSoft.

The Checklist Code for the undergraduate degree candidate's major(s) and minor(s) is **8UGDEG**. This is the only code that you will be responsible for updating.

If the student applied for teacher certification, they will have a second checklist, with a code specific to the type of teacher certification. You do not have to change the status of this Checklist Code.

Navigation: **Campus Community > Checklists > Person Checklists > Checklist Management - Person**

Enter the student's **Stony Brook ID** and click **Search**.

If you do not know the Stony Brook ID you can enter the **National ID** (SS#) or the **last and first name.**

If the student has more than one checklist, select the appropriate one.

If needed, you can use the **Comments** box to enter departmental comments explaining the status of a checklist item. Skip a line under the major/minor entry made by the Registrar's Office, then enter the date, department, and comment.

For example, *"12/13/01, WST: needs to complete…….".*

On the *Checklist Management 2* page there will be a **Checklist Item Sequence** listed for each major/minor (Academic Plan). Change the Status next to the Checklist Item that your department is responsible for.

All student Checklist Items are posted with the **Status** of **Initiated** which indicates that the checklist item <u>has not been reviewed</u> by the department.

When changing the **Status** select from the drop-down menu:

- **Completed** when the student has satisfied all departmental requirements

- **Active** when the student is pending completion of the departmental requirements but is not expected to take future classes

- **Cancelled** when the student has not met the departmental requirements and needs to take additional classes.

When the status is changed to **Active** or **Cancelled** it is helpful if you add a comment to the *Checklist Management 1* page so that the graduation department will be able to inform the student.

Enter your Stony Brook ID (the person updating the Checklist) in the **Responsible ID** field.

Click **Save.**

NOTE: If a student changes a major/minor (i.e., you sign a change of program/plan form), **DO NOT change the major/minor data in the checklist comments field**. This will be done when the program/plan change form is processed by the Registrar's Office.