Updating a Student Checklist

1.) Click on the blue person with magnifying glass icon in the upper right corner.
2.) This will navigate you to the student search page
3.) Click the orange **Search** button to pull up a full list of your Roster of students OR enter their name and click search to search for a specific student.
4.) Click on the Student's name to open their profile
5.) The top half has student information and the bottom half has a row of tabs. Click on the "Checklist" tab.
6.) In that tab will be two types of checklists. Decide which checklist you want to edit and click the underlined checklist name to open it in edit mode.
    1.) University Checklist - this will have your University's name in parenthesis after it. It's usually best to update your University checklist first because information from the University checklist will cascade down into any Hospital's checklist when a student is scheduled at that Hospital.
    2.) Hospital Checklist - each checklist will have the Hospital's name listed in parenthesis after it. You can directly edit the Hospital checklist but any information you enter here will NOT cascade backwards into the University checklist.

7.) Put information in the "Value" column
a.) Usually the system wants the date of when an item was accomplished or completed
i.) You can add a date using the (mm/dd/yyyy) format OR use the drop down calendar
b.) If it says "Renewal Date" then you need to enter the date that this item will expire
i.) Entering an expiration date alerts the system to send you and the student a reminder e-mail one month before and the day of expiration for the item
c.) You may also be able to add regular text such as the last four digits of the student's SSN or a simple "yes" to verify that the student is proficient in English.

8.) Add comments in the "Comments" section.
a.) Be aware that the Hospital, the University and the Student will be able to view these notes.

9.) Lastly, you may upload any Supporting Documents. If a Supporting Document is required, the box will say "Missing Supporting Document". If a document is not required, there will be NO warning in the Supporting Document column.
a.) To upload a document, check the box in the **Associate Document** column on the left side.
1. If you have a document that applies to multiple requirements (i.e. you have an immunization record you want to upload against the MMR and the Tdap, you can select one or more check boxes and mCE will upload the document to both requirements at once.
b.) Click on the **Add Document** button at the bottom.
c.) A pop up window will appear with all your files and folders from your hard drive.
d.) Navigate to and select the file you want to upload by double clicking it.
e.) When the file has uploaded, you will see the file name in blue on the right side of the checklist.
j.) The Hospital, the University and the Student will be able to view this document.

10.) Click **Save Changes**

11.) Click **Close**