



Checklists

Checklists is a SAR-Hub feature which can be used for tracking processes for individual members such as onboarding new members or Position Task Books (PTBs).

A membership admin can define checklists from scratch, export the checklist definition to a file, import a checklist that has been exported, or can append to checklists defined by a parent agency.

For each member, the checklists that have been opened for each member are available both via the Member Detail page or the member's profile page. The member can add notes to a checklist item that can then be viewed by an admin. The authorized members can indicate an item on the checklist is partially or fully complete and add a note as well. The membership admin can enter data for any authorized member, other authorized members can only update an item they are authorized for.

There is a customizable report for Checklists. See Appendix A for a sample.

Basics

See the [SAR-Hub Basics](#) document for help on logging in, navigating to the Agency and Member detail pages, as well the common editing wizards found on many pages. This and other documents are available on the <https://www.sar-hub.com/about> page.

Defining a new Checklist

1. From the Agency Detail dropdown menu, click "Configure Checklists" under Settings.
2. Click "Add", enter the Checklist name, and click "Submit"

This is a screenshot of a web form titled "Agency: Sample Agency Checklists". At the top, the title is displayed in a large, bold, dark blue font. Below the title, there is a horizontal bar with three elements: a blue button with a white plus sign and the text "+ Add", a dropdown menu currently showing "Agency" with a small downward arrow, and a text input field containing "Checklist Name".This is a screenshot of a settings menu. At the top, there are two tabs: "Settings" and "Security", both with downward arrows. Below the tabs is a list of menu items: "Member Status Codes", "Member Category Codes", "Custom Fields", "Date Alert Configuration", "Event Types", "Configure Checklists", and "Configure Id Card Report". The "Configure Checklists" item is highlighted with a red rectangular border.

3. Click “Add Section” to add the first section. Enter the Section Name and click “Submit”. The “seq no” will indicate the order in which the sections will be displayed.

4. Click “Add Sub-Section”. Specify the name of the sub-section, the seq no will indicate the order in which the sub-sections will be displayed within the section. The sub-section detail will define the look of the checklist. Options include:
 - a. **Include ident:** Whether each item will have an “Id” column (useful for Position Task Books to refer to documentation for each item)

 - b. **Custom Text Field #1 Header, Custom Text Field #2 Header:** Additional information columns for the checklist, such as the “Context” that the item should be evaluated in.

 - c. **Include date:** Whether the date is to be captured when the item is evaluated

 - d. **Evaluator Column Header:** The title for the evaluator (e.g. “Reviewed by”, “Completed by”, etc)

 - e. **Custom Evaluator Column #1 Header, Custom Evaluator Column #2 Header:** Additional columns to collect information from the evaluator.

SAR Hub ☰

Section: Application and Dues

Sub-Section: Application

Seq no*

Order of sub sections within section

Name

Enter the checklist sub-section name

Include ident*

Include ident column in this subsection?

Custom Text Field #1 Header

Enter the custom text column name #1

Custom Text Field #2 Header

Enter the custom text column name #2

Include date*

Include date column in this subsection?

Evaluator Column Header*

Enter the evaluator header text

Custom Evaluator Column #1 Header

Enter the custom evaluator column name #1

Custom Evaluator Column #2 Header

Enter the custom evaluator column name #2

Submit
Cancel

- Click “Add Item”. Specify the text of the item and which admin groups are authorized to evaluate the item. See the “Admin Security” help document for adding members to an admin group and for defining custom admin groups.

Sub-Section: Application
List Item: Application Received

Seq no*
Order of items within subsection.

Text*

Application Received

Enter the item description

Authorized Evaluators

Admin Group* [Remove](#)

Admin Group* [Remove](#)

[Add another](#)

Preview:

To preview what the checklist will look like when in use, click “Turn Preview On” in the left menu bar.

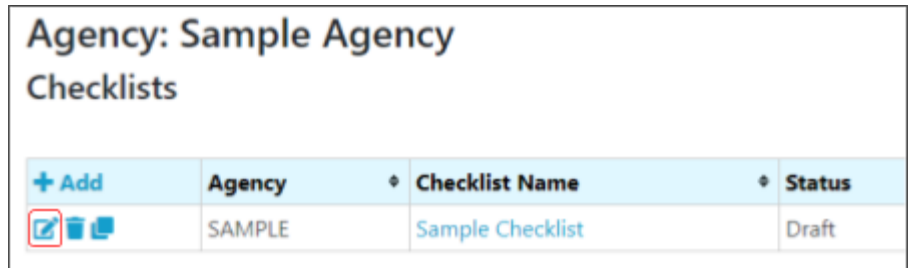
Sample Preview:




Application and Dues			
Application		Date	Received By
Application Received			Membership Admin
Dues		Date	Received By
Dues Received			SAMPLE: Treasurer
Policy		Date	Validated By
Reviewed Constition and Bylaws, and Admin Manual			Membership Admin
Read and agreed to the Standards of Conduct			Membership Admin
Background Check	Date	Validated By	Background Check Source
Provided proof of background check		Membership Admin	

Checklist Status:

When you first create or import a checklist, it will be marked as “Draft”. Once you are ready to have the checklist opened for individual members, mark it as “Published”.

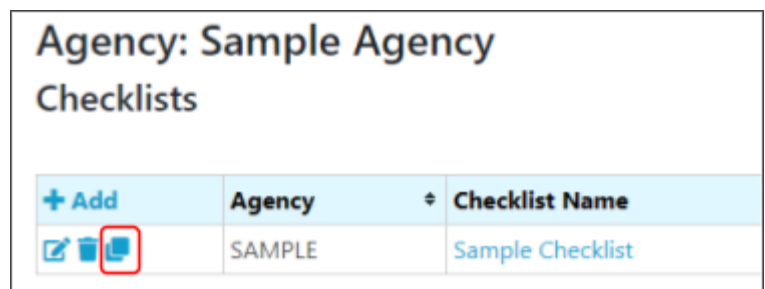
1. From the list of checklists, click the pencil icon.
2. Change the status to “Published”.






+ Add	Agency	Checklist Name	Status
  	SAMPLE	Sample Checklist	Draft

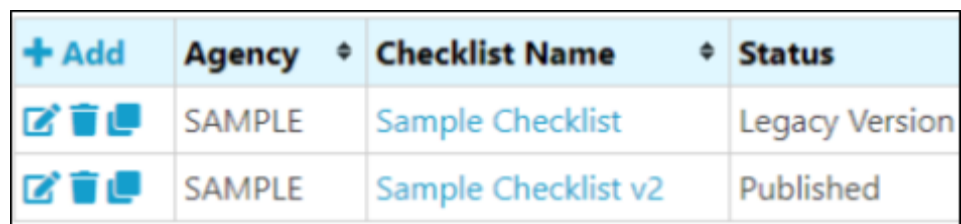
Once Published, the checklist can be opened for an individual. You can make cosmetic changes to the checklist once it's published, but you won't be able to add or delete sections, subsections and items. If it has not yet been opened for an individual, you can change the status back to draft and make changes to it.







To revise a published checklist, use the copy icon to make a new copy, add a version number to the title, and make changes as needed.



+ Add	Agency	Checklist Name
  	SAMPLE	Sample Checklist

When the revised version is ready for use, mark it “Published” and mark the previous version as “Legacy Version”. No new checklists can be opened for a checklist marked as “Legacy Version”, but those already opened can be continued to be used.



+ Add	Agency	Checklist Name	Status
  	SAMPLE	Sample Checklist	Legacy Version
  	SAMPLE	Sample Checklist v2	Published

Sharing Checklist Definitions:

You can share a checklist with another agency using the Export/Import feature.

Export:

To export the checklist, open the checklist detail by clicking on its name in the list of Checklists. (Available from “Settings”, “Configure Checklists” on the Agency detail page). Click “Export” in the left menu bar. The checklist will be written to an “export.txt” file in your downloads folder.

Import:





On the list of Checklist page (Available from “Settings”, “Configure Checklists” on the Agency detail page), click “Import” in the left menu bar. Choose the export.txt file and click “Import”.

Open a Checklist for a Member

A membership admin can open a Checklist for a member by clicking “Checklists” in the left menu bar on the Member Detail page. Any opened checklists for the individual will be listed.

Click “Open” and select the desired checklist.

Member

-  Checklists
-  History
-  Attendance
-  Admin Group(s)

Evaluate / Complete a Checklist Item

1. Click the “+” besides the item.



Member: Johnson, Bob
Member Checklists: Sample Checklist
Status: [Open](#) [Complete](#) | [Suspend](#)
Created: March 12, 2021, 7:34 p.m. by Patty Lindsay
Updated: March 12, 2021, 7:34 p.m. by Patty Lindsay

Application and Dues		Date	Received By
Application			
Application Received			
Dues			
Dues Received			
Policy			Validated By
Reviewed Constitution and Bylaws, and Admin Manual			
Read and agreed to the Standards of Conduct			
Background Check			
Provided proof of background check			

Member of Agency: Johnson, Bob
Checklist Evaluation: Dues Received
Status*
Completed
Date
2021-03-12
Evaluator*
Lindsay, Patty
Note
Check #1234
Comments and notations by the evaluator.

2. Change the status and date as needed.
3. Choose the Evaluator if it is someone other than yourself
4. Add a note if desired
5. Click Submit

A checkmark will be placed beside the item showing it is complete. To revise the evaluation, click the pencil icon. To remove the evaluation, click the trash can.

Application and Dues		Date	Received By
Application			
Application Received			
Dues			
✓ Dues Received	 	2021-03-12	Lindsay, Patty
	Check #1234		
Policy			Validated By
Reviewed Constitution and Bylaws, and Admin Manual			
Read and agreed to the Standards of Conduct			
Background Check			Background Check Source
Provided proof of background check			

Member View of Own Checklists

The member can view a list of their opened checklists from their My Profile page by clicking on “Checklists” under “Links” for an agency.

Nickname	Links
SAMPLE	Qual. History Attendance Checklists

Name	Agency	Created	Status
Sample Checklist	SAMPLE	March 12, 2021, 7:34 p.m.	Open

The member can open the checklist by clicking on the checklist name.

Member: Johnson, Bob
Member Checklists: Sample Checklist

Status: Open
Created: March 12, 2021, 7:34 p.m. by Patty Lindsay
Updated: March 12, 2021, 7:34 p.m. by Patty Lindsay

Application and Dues

Application	Date	Received By
Application Received		

Dues	Date	Received By
✓ Dues Received	2021-03-12	Lindsay, Patty

Check #1234

Policy	Date	Validated By
Reviewed Constitution and Bylaws, and Admin Manual		
Read and agreed to the Standards of Conduct		

Background Check	Date	Validated By	Background Check Source
Provided proof of background check			

The member can add a comment to a checklist item by clicking on the pencil icon.

Member: Johnson, Bob
Checklist Item: Application Received

Member Checklist Notes

Note*

I mailed the application to the treasurer on 3/11/2021.

