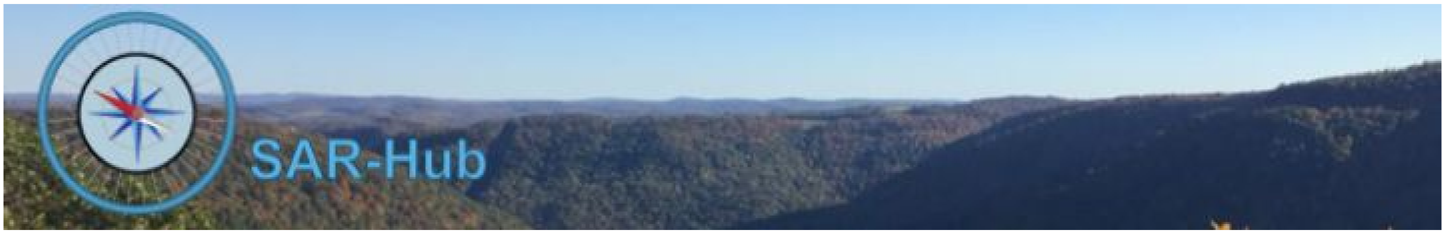


Checklists

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.

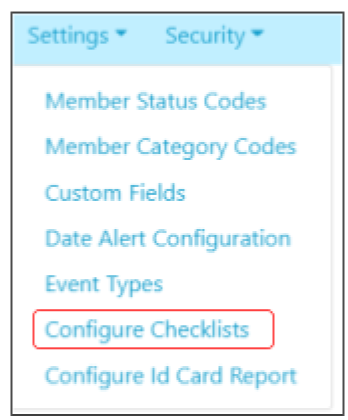
There is a customizable report for Checklists. See Appendix A for a sample.

Basics

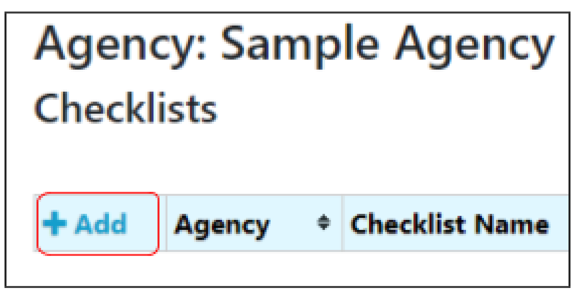
See the [SAR-Hub Basics]() document for help on logging in, navigating to the Agency and Member detail pages, as well the common editing wizards found on many pages. This and other documents are available on the https://www.sar-hub.com/about page.

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"



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:

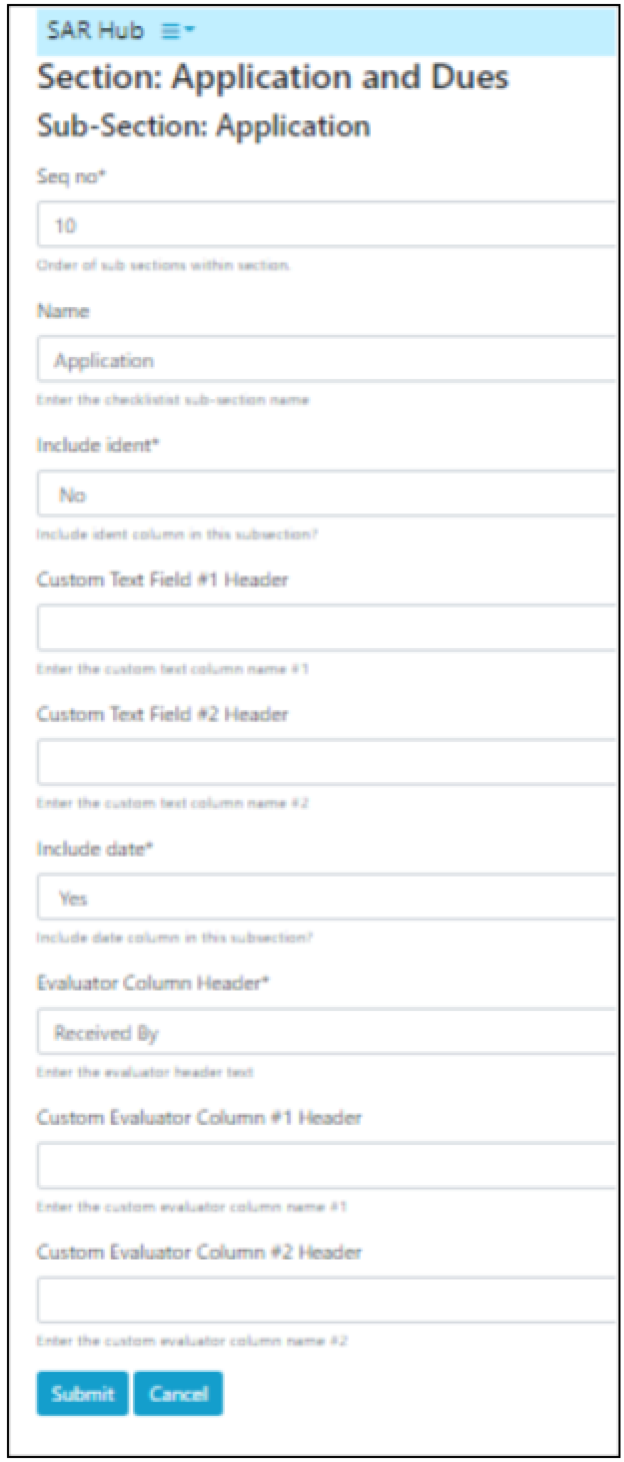
    a. **Include ident:** Whether each item will have an “Id” column (useful for Position Task Books to refer to documentation for each item)

    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.

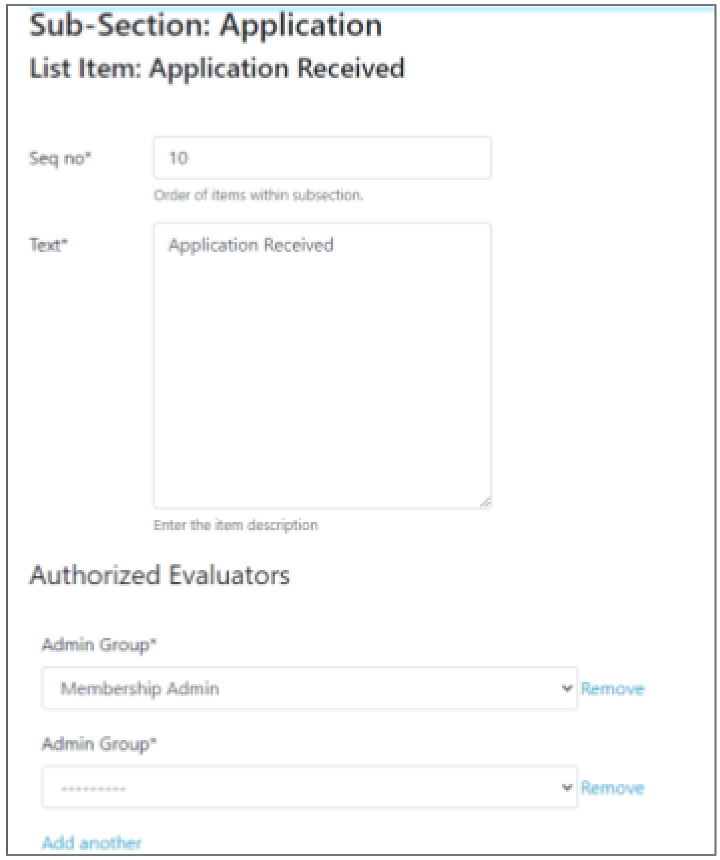
    c. **Include date:** Whether the date is to be captured when the item is evaluated

    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.



5. 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.



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

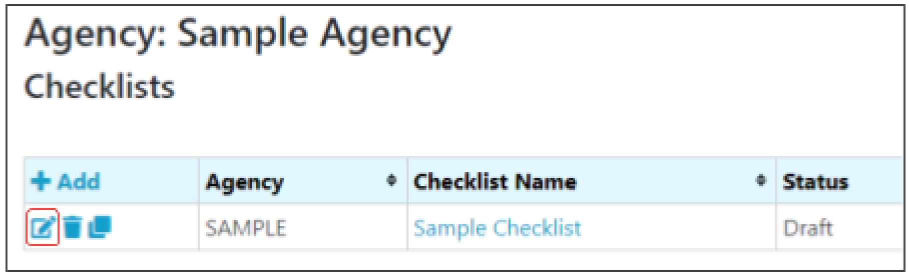
Policy	Date	Validated By
Reviewed Constition and Bylaws, and Admin Manual		Membership Admin
Read and agreed to the Standards of Conduct		Membership Admin

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

Checklist Status:

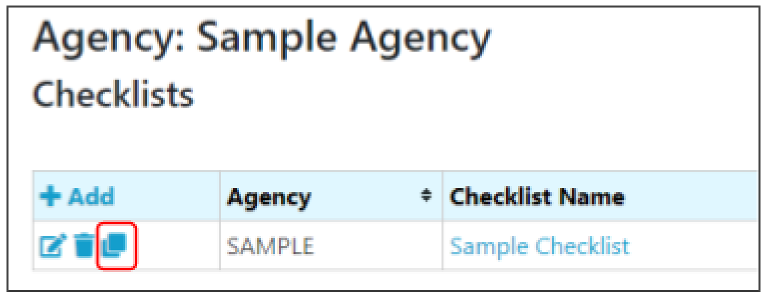
When you first create or import a checklist, it will be marked as “Draft”. Once you are ready to have the checklist opened for individual members, mark it as “Published”.

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

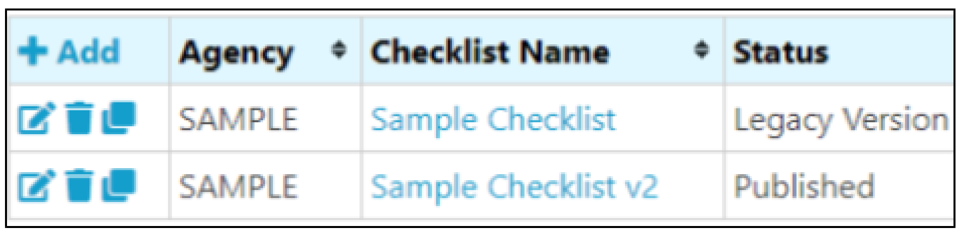


Once Published, the checklist can be opened for an individual. You can make cosmetic changes to the checklist once it's published, but you won’t be able to add or delete sections, subsections and items. If it has not yet been opened for an individual, you can change the status back to draft and make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



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.



Sharing Checklist Definitions:

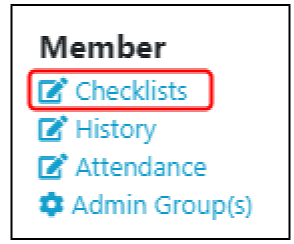
You can share a checklist with another agency using the Export/Import feature.

Export:

To export the checklist, open the checklist detail by clicking on it’s 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”.

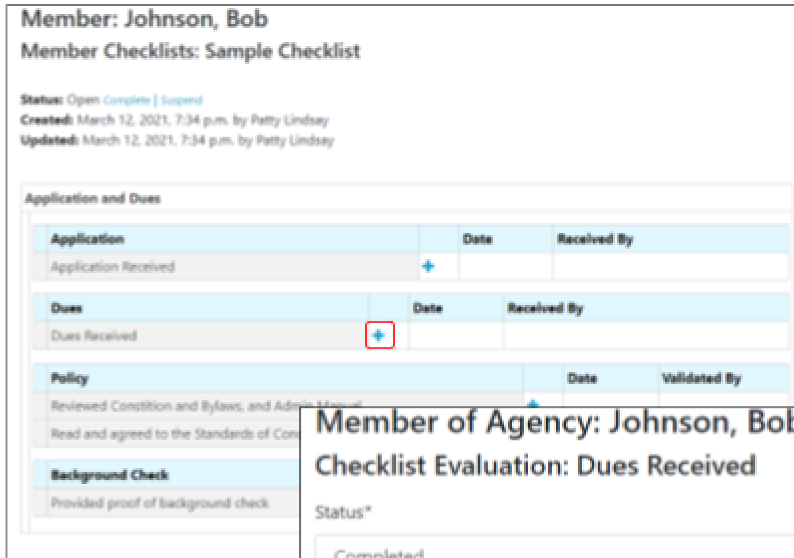


Open a Checklist for a Member

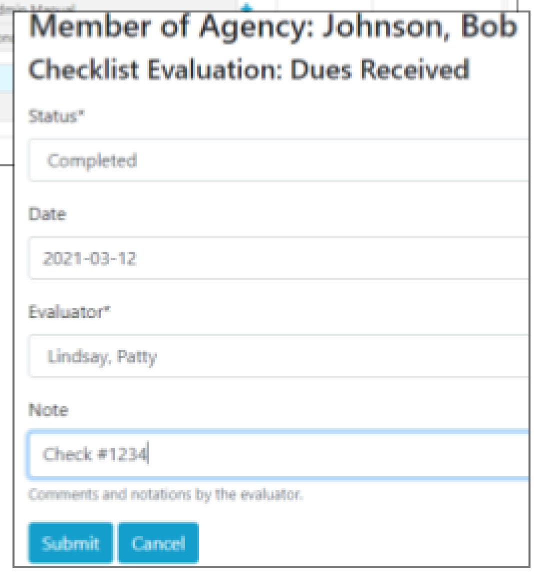
A membership admin can open a Checklist for a member by clicking “Checklists” in the left menu bar on the Member Detail page. Any opened checklists for the individual will be listed.

Click “Open” and select the desired checklist.

Evaluate / Complete a Checklist Item

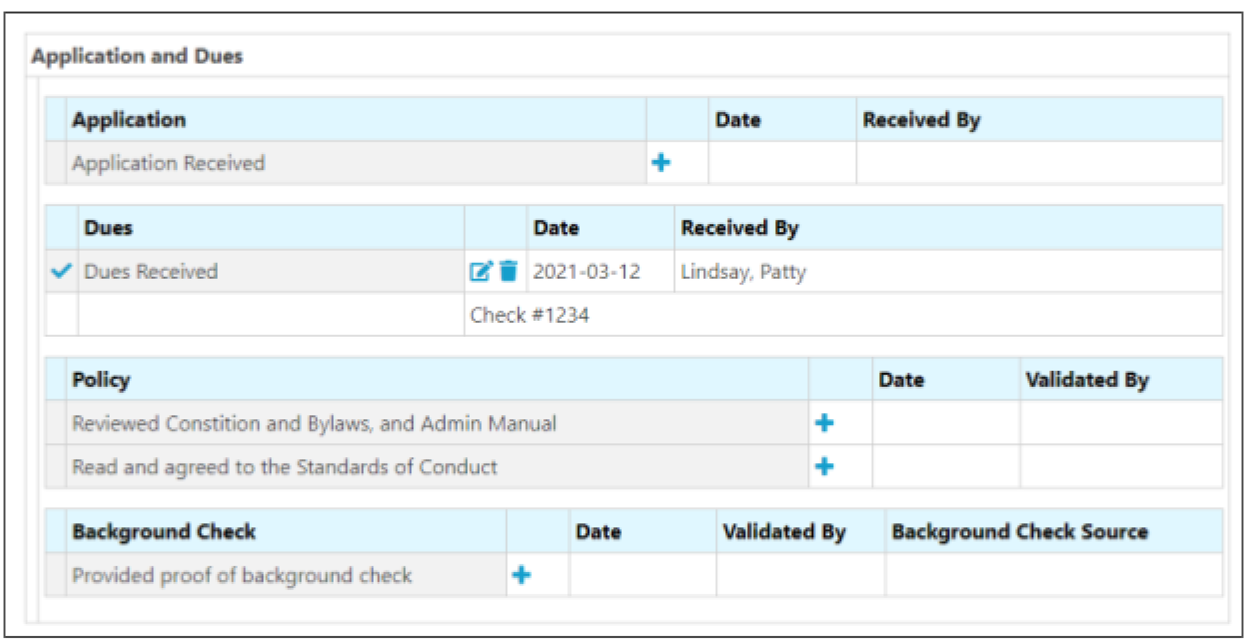


1. Click the “+” besides the item.



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

Application		Date	Received By
Application Received	+		

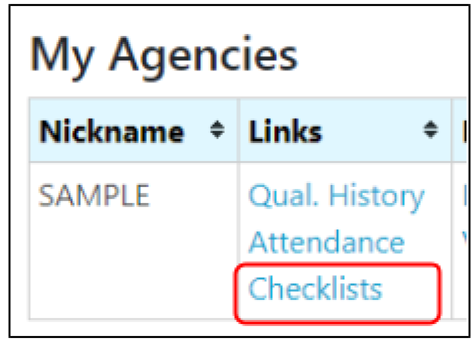
	Dues		Date	Received By
✓	Dues Received		2021-03-12	Lindsay, Patty
		Check #1234		

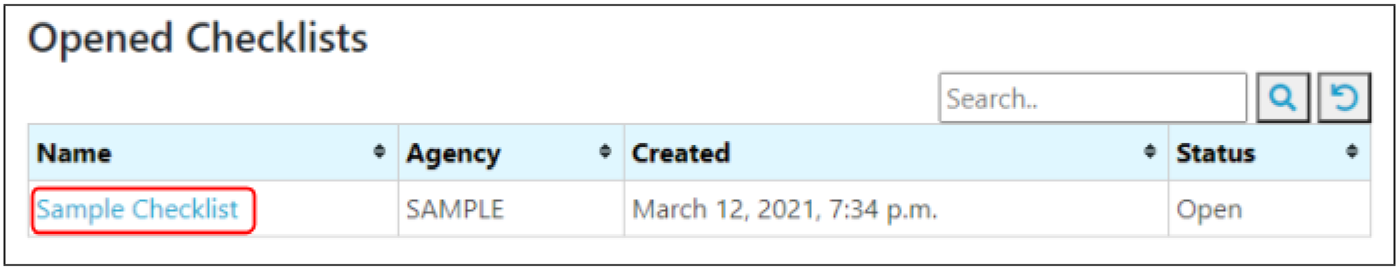
Policy		Date	Validated By
Reviewed Constition and Bylaws, and Admin Manual	+		
Read and agreed to the Standards of Conduct	+		

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

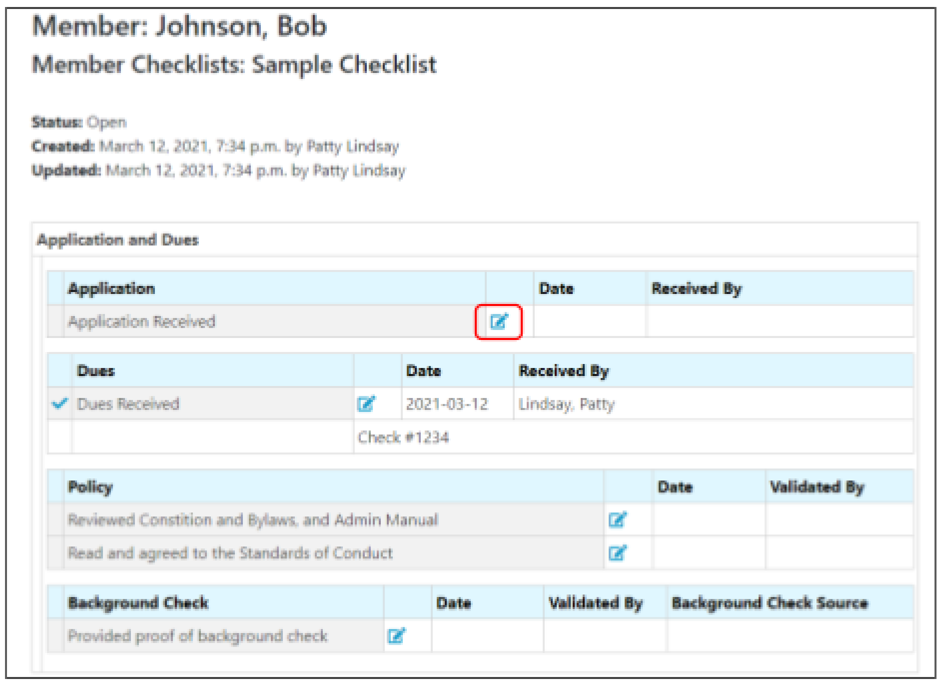
Member View of Own Checklists

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





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

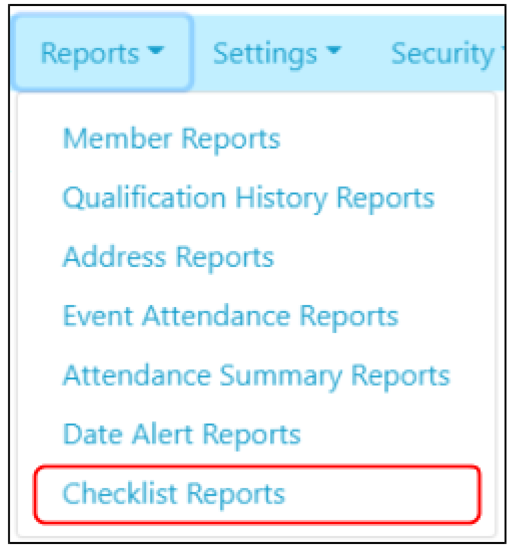


The member can add a comment to a checklist item by clicking on the pencil icon.

Appendix A - Sample Checklist Reports

See the document and video on the SAR-Hub report module for help with customizing and running reports, available on the About page: https://www.sar-hub.com/about

Available from: Reports dropdown menu on the Agency Detail page, “Checklist Reports”



	A	B	C	D	E	F	G	H	I	J	K	L
1	First Name	Last Name	Member Status	Member Category	Member Id	Checklist Name	Checklist Status	Checklist Created	Checklist Last Updated	Item Count	Items Checked	Items Remaining
2	Bob	Johnson	Prospecti	Trainee		Sample Checklist	Open	2021-03-12 19:34:24.	2021-03-12 19:34:24.76	5	1	4
3	John	Smith	Inactive	Canine Handler	103	Sample Checklist	Open	2021-03-13 00:11:52.	2021-03-13 00:11:52.51	5	0	5
4												