Eligibility/Intake Checklists Webinar
February 2014

Two types:

<u>Virtual</u> - Virtual can only be used for filters and job requirements - similar to a very complex set of filters.

<u>Standard</u> - A standard list is applied to a person and can be viewed in a person's record.

*Note: Make the decision first, doesn't work well to switch it. If you need to switch it, delete it and start over.

What can an eligibility checklist require?

- Assignment
- Certification
- Custom Application forms
- Interviews
- Job association
- Training
- Complex rule - a combination of either/or

<u>Statuses</u>

- Complete - All criteria met
- Pending - Partial
- Abandoned - A manually set status
- Ineligible - Do not meet the criteria, either or manually
- "Frozen" - status cannot be changed. Either to pause a checklist or to lock it after completed so that the expiration of things doesn't cause the status to change.

Applying a standard eligibility checklist -

<u>From a person</u>

      From the left navigation menu

      Eligibility checklists -> Apply -> pick checklist

<u>When creating a person</u>

      Set it in the checklist rules in Setup

<u>To a bunch of people</u>

      Administrator tools -> Automatically create eligibility/intake checklists