



# OCIS – Checklists: Helpful Hints

What are OCIS Checklists?	By default, each high school site is assigned Checklists for grades 8-12 which contain suggested OCIS activities. Schools can customize the state-level Checklists and create site-level Checklists for specific groups of students.
Where do I find Checklists?	Students access Checklists via the OCIS Portfolio at <a href="http://ocis.org">http://ocis.org</a> . Checklists are on the Portfolio main menu. Teachers and Counselors access Checklists via the Administration Tools at <a href="http://ocis.org/administration">http://ocis.org/administration</a> by logging in as either the Site Administrator or with a Staff Account. Checklist Editor is under Data Maintenance.
How do I navigate Checklists?	Students click on View next to each Checklist to show the introductory message, supporting document, and activities. Each activity indicates progress completed and date saved as applicable.
How do I create site-level Checklists?	<p>Site Administrators and Staff Accounts can create new Checklists, either by modifying the state-level Checklists or creating site-level Checklists from scratch. Under Data Maintenance, click Checklist Editor.</p> <ol style="list-style-type: none"> <li>1. Duplicate a state-level Checklist and then edit it to create a site-level Checklist.</li> <li>2. Enter a sequence number (1-99) and a Site Checklist Name, then click Add New to establish a site-level Checklist. Next, click Edit to begin creating activities for the Checklist.</li> </ol> <p>Note: site-level Checklists require activation prior to appearing in the student Portfolio. State-level Checklists appear automatically and will need to be <i>Hidden</i> in order to not appear in the student Portfolio.</p>
How do I activate Checklists in student Portfolios?	<p>Checklists can be Activated by either Site Administrators or Staff Accounts. By default, the state-level Checklists (grades 8-12) will appear in all OCIS high school Portfolios without any required action. However, Site Administrators or Staff Accounts can <i>Hide</i> any and all of these Checklists so that students do not see them in the Portfolio.</p> <p>Site-level Checklists require activation prior to appearing in the student Portfolio. Activation can be completed several ways:</p> <ol style="list-style-type: none"> <li>1. Click on <b>Checklist Editor</b> under Data Maintenance from the Admin Tools menu. Here you can activate Checklists by group or graduation year. Now, click Activation next to the desired Checklist. Choose either a Group or Graduation Year for which to activate the identified Checklist. Click Assign New and then click Activate. Verify the list of students and click Activate Checklists (you can choose more than one Checklist from the check boxes provided).</li> <li>2. Click on <b>Portfolios</b> under Data Maintenance from the Admin Tools menu. Here you can activate Checklists for a single student, several students, or by group and graduation year. Select the student or students according to the available options. Next, click the check box next to each student for which the Checklist(s) should be activated (note: select or unselect all at the top of the table). From the drop-down menu, select Activate Checklists. Select the Checklist(s), verify the student list, and click Activate Checklists.</li> <li>3. Click on <b>Group</b> under Reports from the Admin Tools menu. Here you can create a Group or Graduation Year report, view the results, and activate an individual Checklist by student. Choose My Checklists as the report and choose a group or graduation year from the respective drop-down menu. Choose Summary as the report type and then click Generate Report. Click Activate from the far-right column next to the student and Checklist for which to activate.</li> </ol> <p>Note: if activating Checklists for more than 20 users or a combination of Checklists that exceed 20 in a single step, the activation will require 24 hours. Otherwise, a combination of less than 20 will occur immediately. You can repeat combinations of 20 that will appear immediately, as long as there isn't a combination of more than 20 in a single step (i.e.: activating one checklist among 20 students, 4 checklists among 5 students, etc.).</p>
Can I create reports on Checklists?	Site Administrators and Staff Accounts can create reports based on an individual portfolio, group, site or specific activities. The reports are accessible from either the Checklist Editor main menu or the respective report category in the Reports section of the Admin Tools (i.e.: site, group, and individual portfolio).
Is there more support for using Checklists?	Checkout the tutorial in the Tools for Counselors and Teachers at <a href="http://ocis.org">http://ocis.org</a> as well as the archived webinar on the ODE website at <a href="http://education.ohio.gov">http://education.ohio.gov</a> (search: OCIS).