Checklists & Checklist Items

Checklists allow you to check off completed student/client work. It also allows your students to see if you have checked their items as being completed. (Remember, if items you want to track are added to or uploaded to the WOIS portfolio, a custom report would serve you better than a checklist. Contact tami@wois.org for a custom report.)

1. To access the Checklist tool
   a. Log in to your portfolio administration
   b. Click on Site Setup on the left side, green menu
   c. Click on Checklists

2. Before creating a checklist, you must first create the checklist items. Your checklist items will be a list of all items you have defined for all of your checklists. If you are only going to have one checklist, and you don’t want students to see the items in their portfolios, you do not need to go through the next four steps.

3. After defining your checklist items, type the name of a checklist under Add New Checklist, then click Create Checklist.

4. Your checklist items will be available on the right side of the screen. Choose the items you want for this checklist, then click Add selected item(s).

5. If this checklist is only for one grade of students, you can choose the grade level. Then when you view the checklist, you will only see students in the grade you chose. You will still be able to filter the list further from the view of the checklist.

6. If you choose Yes, under User’s can view?, your students/clients will be able to see the items of this checklist in the Checklists section of their portfolio. A blue check mark will show next to the checklist items in the portfolio if you have placed a check for that item next to the student/client’s name in your checklist.

7. In the description box, you can either enter a description for the checklist, or enter instructions for your students/clients. The description will show on the page with the checklist in the student/client portfolio.

8. Indicate the order for the checklist items by typing numbers under the Order column, then click Update checklist.

When you view a checklist by clicking on the checklist name, you will see all your students/clients with portfolios, and the columns you define for your checklist. This list can be filtered by grade, group or letter of the alphabet, just like the other reports in the portfolio administration.
Place a check in the box on the student/client name line when they have completed the item. **To record the check, or multiple checks for multiple students/clients, click Update checklist at the bottom of your student/client list.**

If you want a checklist to be the same for all schools or for multiple schools in your district, create the checklist, then email tami@wois.org to have it duplicated for the rest of the district.