Customizable Checklists

What is the purpose?

Customizable Checklists are used in the Grants Management and the Program modules to document programmatic and administrative reviews of applications prior to award. Customizable Checklists allow different agencies and business areas within each agency to require agency users to respond to pertinent organization-specific questions. The checklists have two parts: agency-level checklist items determined by policy and business area-level checklist items associated with a type of application or activity code. This flexible and configurable business object is ideal for business processes which must accommodate both centralized policy and organization-specific questions.

What are the features of Customizable Checklists?

There are two main parts of Customizable Checklists — the Checklist Administration screen and the checklist as it appears in the Grants Management (GM) or Program (PGM) workflow.

Every agency designates one or more Checklist Administrator(s) who maintains the checklist items for the Program and Grants Management staff within the agency or business area.

There are three main functions on the Checklist Administration screen:
- **Query** enables the Checklist Administrator to retrieve existing checklists based on specified search criteria such as business area, application type and/or activity code.
- **Create** enables the Checklist Administrator to create, edit, delete and/or resequence checklist items.
- **Checklist Items** displays a "read-only" hitlist resulting from a query.

Once the checklist items have been created by the Checklist Administrator, the appropriate items will be displayed for each grant on a checklist page in the PGM and GM applications. Program staff accesses the checklist as a normal part of their workflow in PGM when approving a grant application for review. Grants Management staff accesses the checklist through GM as part of their normal grant workup. In both cases, the user must answer all required questions before marking the checklist as 'Complete'.

What are the benefits?

- The ability to systematically document required programmatic and administration reviews of a grant prior to issuing an award provides an important documentation of management controls.
- Grants Management Specialists and Program Officials only see the checklist   questions that apply to the specific grants they manage.
- Customizable to meet specific awarding component requirements.