**Clean-up for Inaccurately Assigned Exx162 Checklists**

## Identify Checklists

**Navigation: Reporting Tools > Query > Query Viewer**

Enter the query name **QCS\_FA\_SB\_CLEANUP\_162** then select **Search**

This query is designed to create an Excel file that will be used for a Mass Waiving process.

Select Excel under Run to Excel:





Prompts:

**Institution:** WAxxx (Where xxx is your Institution Code)

**Aid Year:** 2025

**Checklist Item:** Exx162

**(Optional) Status:** Initiated (Recommended)

Depending on your processing preference, the Checklist status can be left blank to capture any Exx162 checklist that has been assigned to a student over the ‘Independent by Age’ threshold. OR if many checklists have already been ‘worked’ and you don’t want to undo prior work, you can indicate the Initiated status to grab just those are remaining in an Initiated status.

Results:



\*Recommended to review/spot-check your list before creating your External File for Mass Waiving.

## Create your .CSV

Save your file as a .csv (comma delimited). Be sure to delete the header row in your file.

**Your file layout must be:**

\*Do **NOT** have a Header row in your file\*

Column A: EMPLID

Column B: AID\_YEAR

Column C: INSITUTION



**Save As** a **.CSV** (Comma delimited)

## Create New Event Definition

This step drives the information used in the *Run 3C Engine* process.

For this Example, a new Event Definition was created for this one time process, but made with flexibility in case another cleanup process may be needed in the future.

**Navigation: Campus Community > 3C Engine > Set Up 3C Engine > Event Definition**

Select the **Add a New Value** tab then enter the **Academic Institution** and **Event ID** for your institution using the naming convention ‘**FISXXXWCU**’ where ‘**XXX**’ represents your institution’s 3-character checklist naming convention prefix (i.e. EBB for Big Bend, ECC or Centralia, etc.)



Select **Add** then complete the following areas:

**Description:** W-Waive Mass Clean-up

**Short Description:** W-Waive CU

**Function:** FINA

**Checklist Code:** Exx162

**Item Code:** It should auto-populate

**Responsible ID:** Update tothe institution’s Financial Aid Office ID

**Item Status:** Waived

**Update Status:** Select the Checkbox



Please note: one of the *Responsible ID* fields is hidden in the **Detail** link. Selecte the Detail link, Update the Responsible ID field to the institution’s Financial Aid Office. Select OK then Save.





## Create Event 3C Groups (required for New Event Definitions)

This page is used to assign Event Definition access to specified user groups. If this step is not completed on the Event Definition, you will not be able to see it when you set up your *Run 3C Engine* Run Control ID.

**Navigation: Campus Community > 3C Engine > Set Up 3C Engine > Event 3C Groups**

Enter your **Academic Institution** and **Event ID** then select **Search.**

**Note:** If you moved to this page right after creating the Event Definition, this page may open without needing to enter parameters.



## Run 3C Engine

This step will identify the checklist listed in the Event Definition for selected students.

**Navigation: Campus Community > 3C Engine > Run 3C Engine**

1. Enter a New or Existing Run Control ID
	* Run Control ID naming convention example WAXXX\_PY\_CHECKLIST\_CNCL\_YY
	* XXX = Institution’s destination (i.e. 030, 160, etc.)
	* YY = User’s initials
2. Under the *Process 3C’s section* select the **Population Selection** check box
3. Under the *Event Selection section* populate the following fields:

**Academic Institution:** Your Institution

**Administrative Function:** FINA

**Event ID:** If you enter **%WCU**, your Event Definition should appear given there is no typo in your Event Definition and the proper FA 3C Security Groups are assigned



**Note:** The current **Checklist Code** that is selected in the *Event Definition* will populate. If it’s a different checklist than what you’re expecting, return to the Event Definition and select the different Checklist Code.

1. Under the *Population Selection section* set the *Selection Tool* to **External File** then Upload your **Mass Exx162 Cleanup** file
2. File Mapping will be **ID\_AIDYR\_INST**. Don’t forget to Preview your results to make sure your data is mapped and the correct fields 😊



1. Select the **Preview Selection Results** **link** and note some sample students for validation after the process has been run
2. Select the **Manage Duplicate Assignment** tab
3. Ensure the **Check Duplicate Checklist** check box is checked
4. Select **Variable Data: Match** and **Checklist Status: Initiated**



**Note:** The Check Duplicate Communication can be selected or unselected. This Event Definition is tied to checklists and not communications so the checkbox has no effect on this Run Control ID.

**Note 2:** This Run Control ID is tied to an Event Definition that updates existing checklists so there really is no duplicate checking that occurs but just in case your Event Definition is set up incorrectly with the Update Status checkbox not selected, it’s best to set these parameters to avoid additional checklists being added to the student instead of updating the existing checklist.

1. Return to the **3C Engine Parameters** tab and select **Save** then **Run**
2. Wait until the process runs to *Success* and *Posted* in the *Process Monitor* before moving on to reviewing outcomes.

## Reviewing Outcomes

To verify that the students’ checklists updated appropriately, use the students from the Run 3C Engine *External File list* or examples from the *Preview Selection Results* and confirm the checklists reflect a status of ‘**Waived**’ on the *View Financial Aid Status* page. The checklist should no longer appear on the student’s *To Do List* in the *Student Services Center*.