

Add, Edit, and Delete Checklists

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Path: Main Menu > Admin Tools Menu > System Setup (Supplemental) > Checklist Setup

About

Checklists are used for quickly recording information about multiple clients at once, and replace paper hourly rounds and bed checks. Users with access to System Setup (Supplemental) can add, edit, and delete Checklists for their Agency.

Add a New Checklist

1. Navigate to Checklist Setup by following the path above.
2. In the Checklist Setup Select section, click the **New** button to add a new Checklist.

Checklist Setup Select										
New	Checklist Name	Row Header	Show Row Names	Show Progress Notes	Progress Note Name	Progress Note Col 1 Name	Progress Note Col 2 Name	Show Row Select Dropdown in Col 1	Populate Checklist by Building	Show Patients by Block

3. Complete the following fields.

- **Checklist Name:** Enter a name for the Checklist.
- **Row Header:** Enter what you would like the row header to display.
- **Show Row Names:** Select the checkbox if you want to display the row names.
- **Show Progress Notes:** Select the checkbox if you want a progress note section to be displayed.
- **Progress Note Name:** Enter a name for the progress note header.
- **Progress Note Col 1 Name:** Enter what you would like Column 1 to be named.
- **Progress Note Col 2 Name:** Enter what you would like Column 2 to be named.
- **Show Row Select Dropdown in Col 1:** Select the checkbox if you would like to add a drop-down to column 1 of the Progress Note. This drop-down will provide a list of the Checklist row names to choose from.
- **Populate Checklist by Building:** Select the checkbox if you would like to populate the Checklist by building.
- **Show Patients by Block:** Select the checkbox to display all clients for a specific time block. This also automatically selects the Populate Checklist by Building checkbox and will display clients in a list by building and block. When selecting Show Patients by Block, Show Progress Notes is no longer an option to select.



Note: By not selecting Populate Checklist by Building or Show Patients by Block, the Checklist will populate by an individual client.

4. Click the **Update** button to save your changes.

Add Columns to a Checklist

1. Navigate to Checklist Setup: **Main Menu > Admin Tools Menu > System Setup (Supplemental) > Checklist Setup**
2. Within Checklist Setup, click the **+** next to the Checklist you created to display the Columns section.
3. To add a new column, click the **New** button in the Columns section.



Columns					
New	Column Name	Column Type	Specify Dropdown Option Order	Required	#
No data to display					
			Preview changes	Save changes	Cancel changes

4. Complete the following fields.

- **Column Name:** Enter a column name.
- **Column Type:** Select the type of field you would like this to be from the drop-down (e.g. dropdown, user dropdown, text)

Note: If you added a Column Type of 'dropdown', click the **+** next to the column and click the **New** button under Dropdown Options to add the drop-down choices. Then click the **Save changes** button.



Columns						
	New	Column Name	Column Type	Specify Dropdown Option Order	Required	#
<input type="checkbox"/>	<input type="checkbox"/> Edit Delete	Activity	dropdown	<input type="checkbox"/>	<input checked="" type="checkbox"/>	 

- **Specify Dropdown Option Order:** Select the checkbox if you want the drop-down options to display in sort order. The default is to list options alphanumerically.
- **Required:** Select the checkbox if you would like to make this column a required field. If the Required checkbox is selected, and the user is not able to fill in the column on the Checklist for the client, then the Checklist will not be able to be sealed.
- **#:** Click the up or down arrows to sort the columns.

5. Repeat steps 2-3 until all columns are added.
6. Click **Preview changes** to preview your work prior to saving, **Save changes** to save your work, or **Cancel changes** to not save your changes.

Add Rows to a Checklist

1. Navigate to Checklist Setup: **Main Menu > Admin Tools Menu > System Setup (Supplemental) > Checklist Setup**
2. Within Checklist Setup, click the **+** next to the Checklist you created to display the Rows section.
3. To add a new row, click the **New** button in the Rows section.

Rows		
<input type="checkbox"/> New	Row Name	#
No data to display		
<input type="button" value="Preview changes"/> <input type="button" value="Save changes"/> <input type="button" value="Cancel changes"/>		

4. Complete the following fields.
 - **Row Name:** Enter a row name.
 - **#:** Click the up or down arrows to sort the rows
5. Repeat steps 2-3 until all rows are added.
6. Click **Preview changes** to preview your work prior to saving, **Save changes** to save your work, or **Cancel changes** to not save your changes.

Edit or Delete a Checklist


1. Navigate to Checklist Setup: **Main Menu > Admin Tools Menu > System Setup (Supplemental) > Checklist Setup**
2. Within Checklist Setup, select one of the following options next to the Checklist to edit or delete.
 - **Edit:** Make your changes and click the **Update** button to save the changes.
 - **Delete:** A pop-up will display asking you to Confirm Delete?
 - **Ok:** This will delete the selected Checklist.
 - **Cancel:** This will cancel the deletion and return you to the Checklist.

Checklist Setup Select											
	New	Checklist Name	Row Header	Show Row Names	Show Progress Notes	Progress Note Name	Progress Note Col 1 Name	Progress Note Col 2 Name	Show Row Select Dropdown in Col 1	Populate Checklist by Building	Show Patients by Block
	Edit Delete	Hourly Check Form -12 AM - 6 AM	Time	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Progress Note			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>


Edit or Delete a Column

1. Navigate to Checklist Setup: **Main Menu > Admin Tools Menu > System Setup (Supplemental) > Checklist Setup**
2. Within Checklist Setup, click the **+** next to the Checklist you created to display the Columns and Rows sections.
3. Select one of the following options, next to the Column or Row to edit or delete.



Note: If a column has a Column Type of 'dropdown' and the drop-down options need to be edited or deleted, click the  button to view the drop-down options and edit or delete by following the instructions below.

- **Edit:** Make your changes and click the **Update** button to save the changes.
- **Delete:** A pop-up will display asking you to Confirm Delete?
 - **Ok:** This will delete your selected column or row.
 - **Cancel:** This will cancel the deletion and return you to the Checklist.

Rows		
New	Row Name	#
Edit Delete	12:00	



Note: If something was deleted in error, click the **Recover** button to restore the column, row, or column type drop-down options.

Rows		
New	Row Name	#
Recover	12:00	