Using Checklists

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> **Path: Main Menu > Progress Notes Menu > Bed Checks and Checklists**

About

Checklists are utilized by Residential Agencies and they replace paper hourly rounds/bed checks. There are three different ways to view and use a Checklist: by client, by building, or by block. The way a Checklist is displayed is determined by how your Agency has this functionality set up. Click the **+** sign next to each topic to expand the details for the different ways Checklists can be viewed and used.

Checklist by Client

1. Within Bed Checks and Checklists, click the **Open** button next to the Checklist you would like to open. The Checklist will open by client.

📌 **Note**: The first time you open the Checklist, it will not have a client associated. To add a client tab, use the Client Search field and radio buttons and click the **Add Tab** button. Additional clients can be added this way.

2. Fill in the fields as appropriate.

📌 **Note**: If you've opted to add a Progress Note section, it will be displayed at the bottom of the Checklist. Add additional notes there as needed.

3. Select one of the following options.

   - **Preview Changes:** Allows you to preview changes made to the Checklist.
   - **Save Changes:** Saves the changes made to the Checklist.
   - **Cancel Changes:** Cancels the changes made to the Checklist.

📌 **Note**: If another user is working on the Checklist at the same time, you will be able to view their changes as they are saved.

4. If you are finished with your Checklist, click **Seal Checklist** and enter your password to seal the Checklist.
5. Click the **Main Menu** button to go back to the main menu or click the **Go Back** button to go back to the list of Checklists.

Checklist by Block

1. Within Bed Checks and Checklists, click the **Open** button next to the Checklist you would like to open. The Checklist will open and default by building and the first block.

📌 **Note**: To change the building or block, click the building or block drop-downs and choose from the list. Click the **Open Block** button.

2. Fill in the fields as appropriate.
3. Select one of the following options.

   - **Preview Changes:** Allows you to preview changes made to the Checklist.
   - **Save Changes:** Saves the changes made to the Checklist.

- **Cancel Changes:** Cancels the changes made to the Checklist.

> 📌 **Note**: If another user is working on the Checklist at the same time, you will be able to view their changes as they are saved.

4. If you are finished with your Checklist, click **Seal Checklist** and enter your password to seal the Checklist.
5. To move to the next block, click the **Block** drop-down and choose from the list.
6. Click **Open Block**.

> 📌 **Note**: After sealing the Checklist, if you leave the window and come back to the checklist it will automatically default to the next unsealed block in the drop-down. Click the **Open Block** button.

Checklist by Building

1. Within Bed Checks and Checklists, click the **Open** button next to the Checklist you would like to open. The Checklist will open by building.

> 📌 **Note**: To change the building, click the Building drop-down and choose from the list. Click the **Open Building** button.

2. Fill in the fields as appropriate.

> 📌 **Note**: If you've opted to add a Progress Note section it will be displayed at the bottom of the Checklist. Add additional notes there as needed.

3. Click one of the following options.

- **Preview Changes:** Allows you to preview changes made to the Checklist.
- **Save Changes:** Saves the changes made to the Checklist.
- **Cancel Changes:** Cancels the changes made to the Checklist.

> 📌 **Note**: If another user is working on the Checklist at the same time, you will be able to view their changes as they are saved.

4. If you are finished with your Checklist, click **Seal Checklist** and enter your password to seal the Checklist.
5. To move to another building, click the Building drop-down and choose from the list, otherwise click on the next client tab to complete their information.
6. Click the **Main Menu** button to go back to the main menu or click the **Go Back** button to go back to the list of Checklists.

Clear Checklist

> ❗ **Warning**: It is important to understand how the **Clear Checklist** button functions. For all Checklists, it removes all of the data from the Checklist and regenerates an empty Checklist. It is important to review the clients listed on the Checklist for accuracy prior to using the Checklist for the day.

1. Within Bed Checks and Checklists, click the **Open** button next to the checklist you would like to open.
2. Locate the Checklist you would like to clear.
3. Click **Clear Checklist**.

> 📌 **Note**: Only users with a Correction Enabled permission can clear a Checklist that is sealed **Maintain Users > Process Permissions > Correction Enabled.**