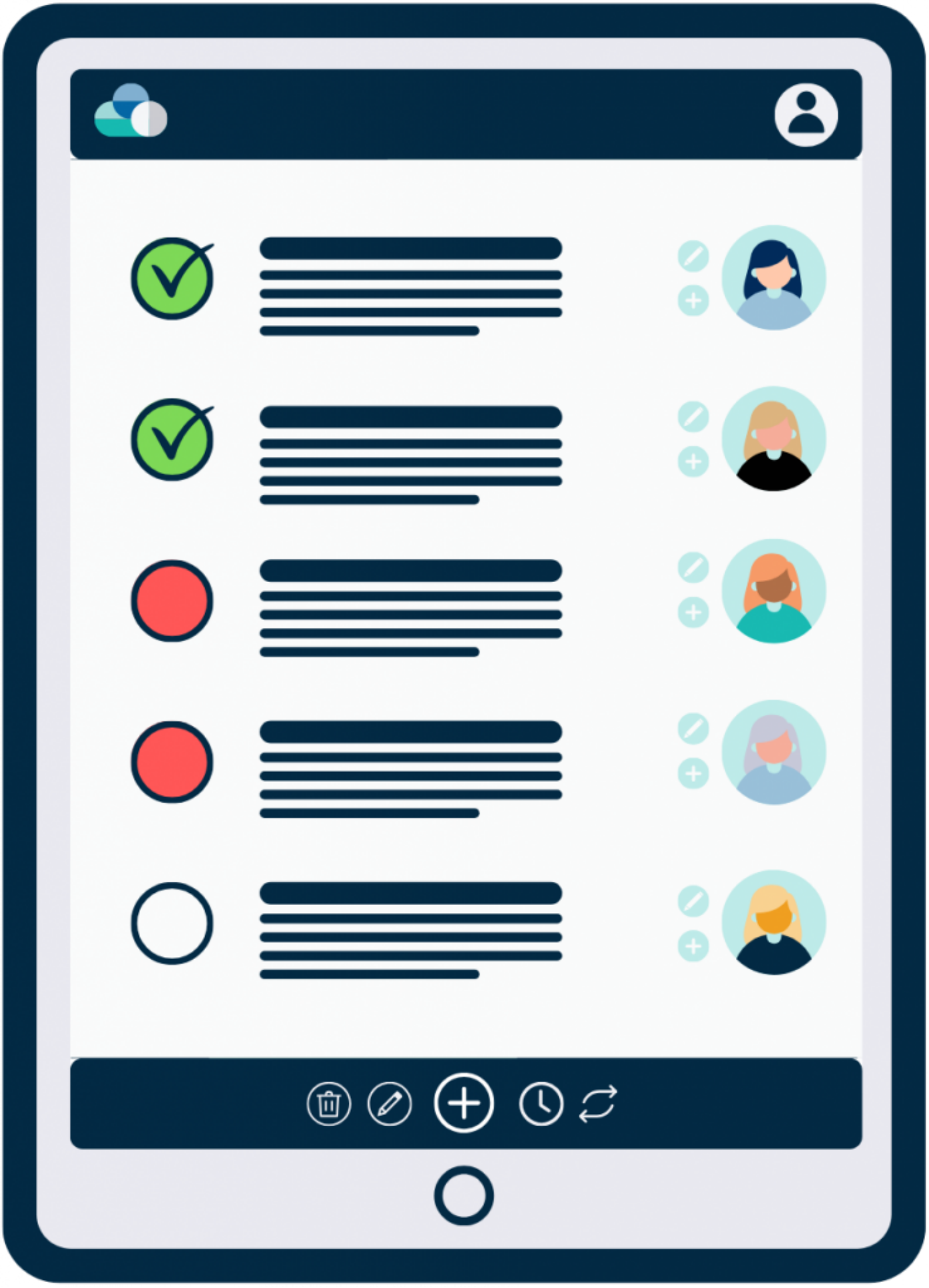
Assigning a Checklist to Multiple Staff

Checklists Windows · https://cclearninghub.co.uk/docs/assigning-a-checklist-to-multiple-staff/

Assigning a Checklist to Multiple Staff

This guide will cover one method to assign a checklist to multiple staff members. This method allows staff to collaborate on the same checklist and complete the same one together.



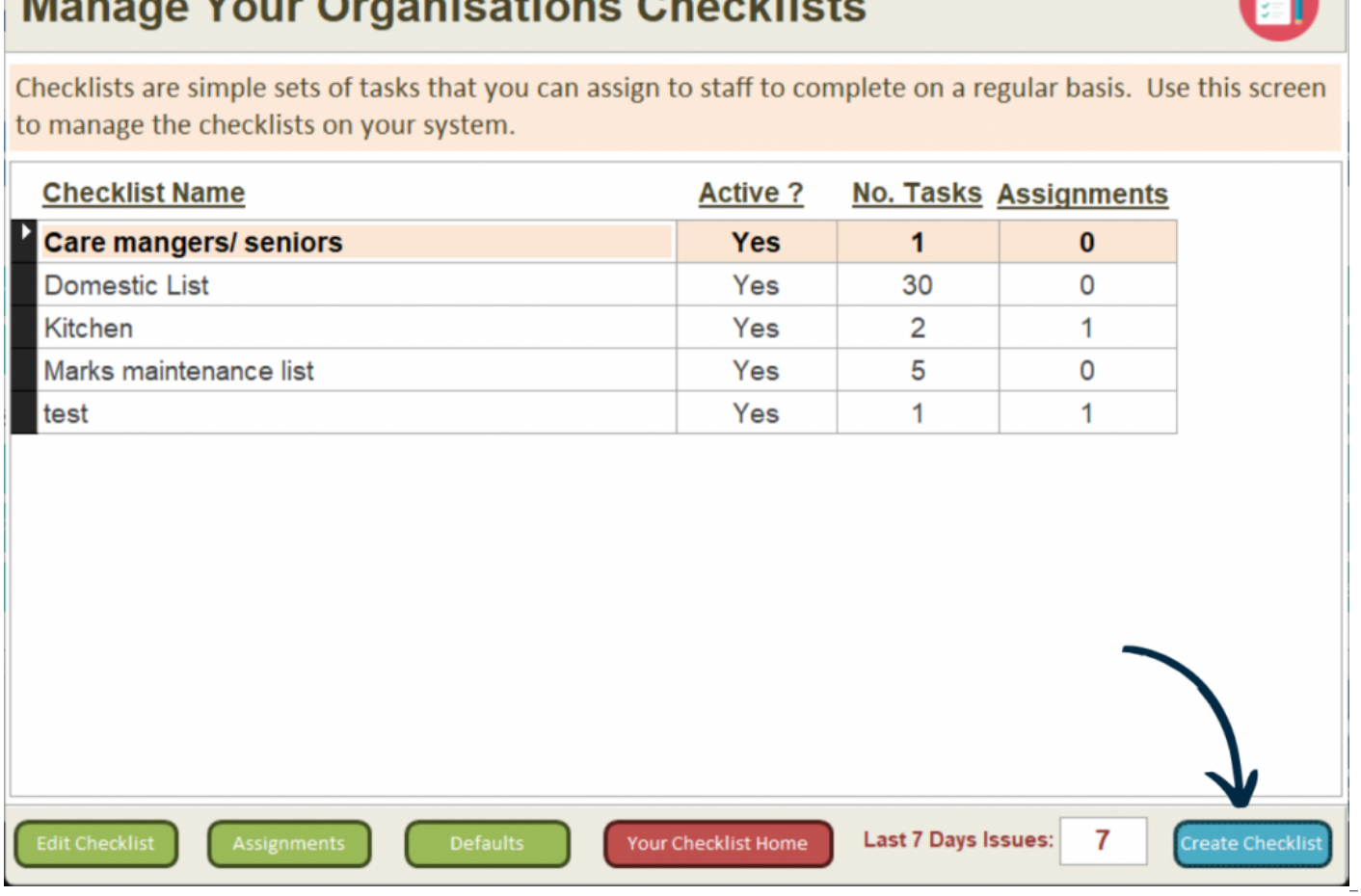


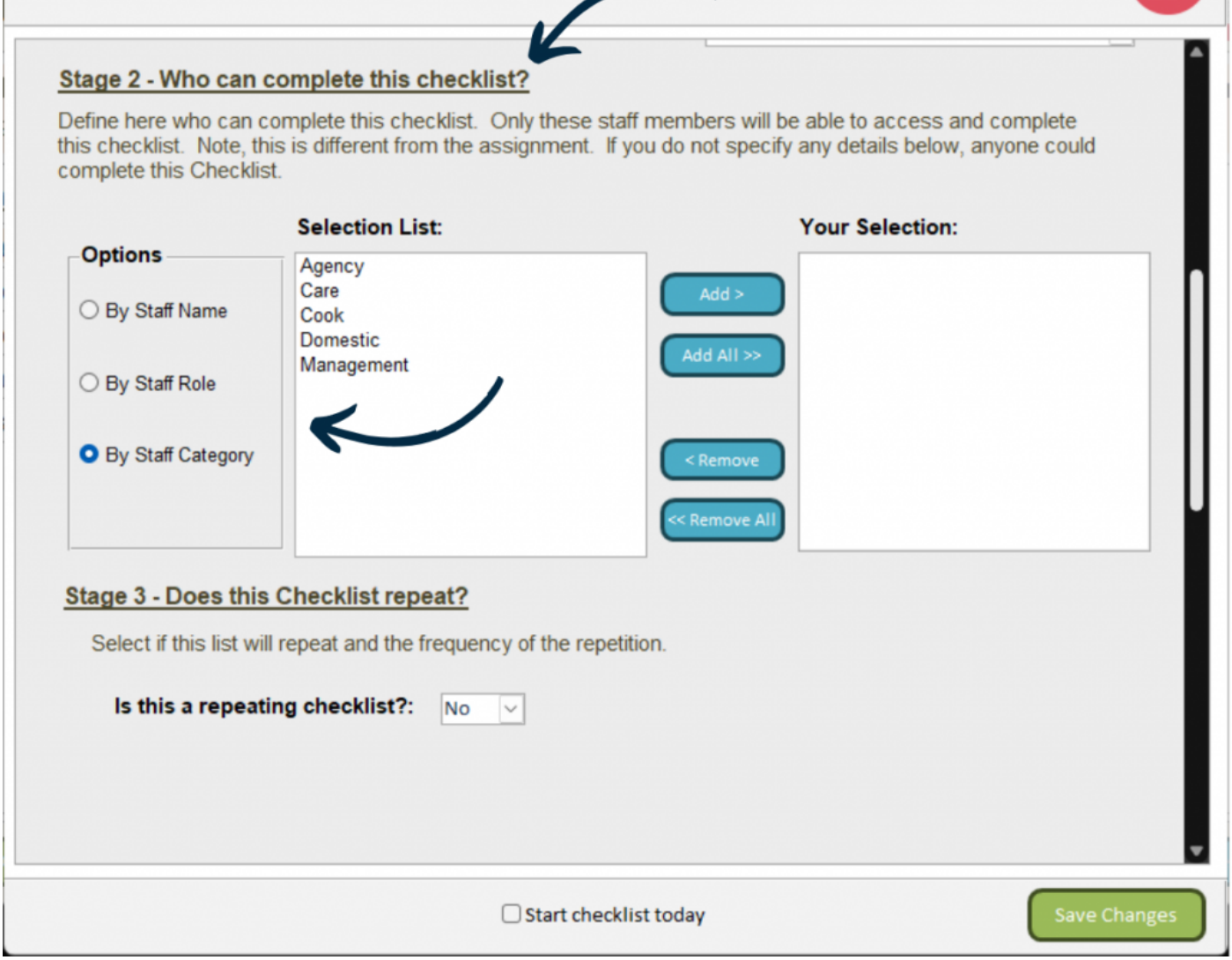
1

In the Administration of Care Control Windows, navigate to the **Checklists** tool, which can be found under the Communication tab.

2

Here, press **Create Checklist** to begin.


Manage Your Organisations Checklists
Checklists are simple sets of tasks that you can assign to staff to complete on a regular basis. Use this screen to manage the checklists on your system.
Checklist Name
Active ?
No. Tasks
Assignments
Care mangers/ seniors
Yes
1
0
Domestic List
Yes
30
0
Kitchen
Yes
2
1
Marks maintenance list
Yes
5
0
test
Yes
1
1
Edit Checklist
Assignments
Defaults
Your Checklist Home
Last 7 Days Issues:
7
Create Checklist



3

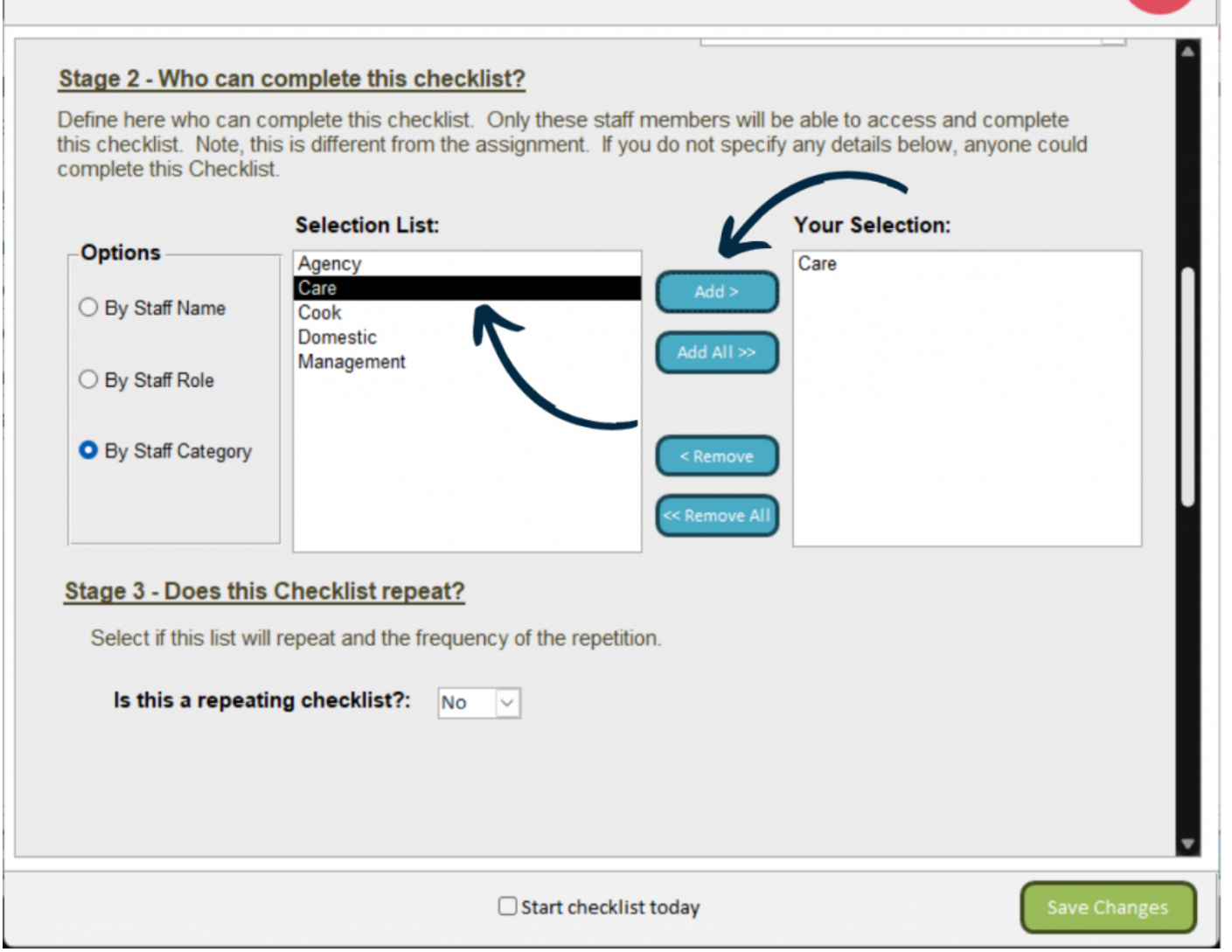
Complete the form as described in **this guide**.

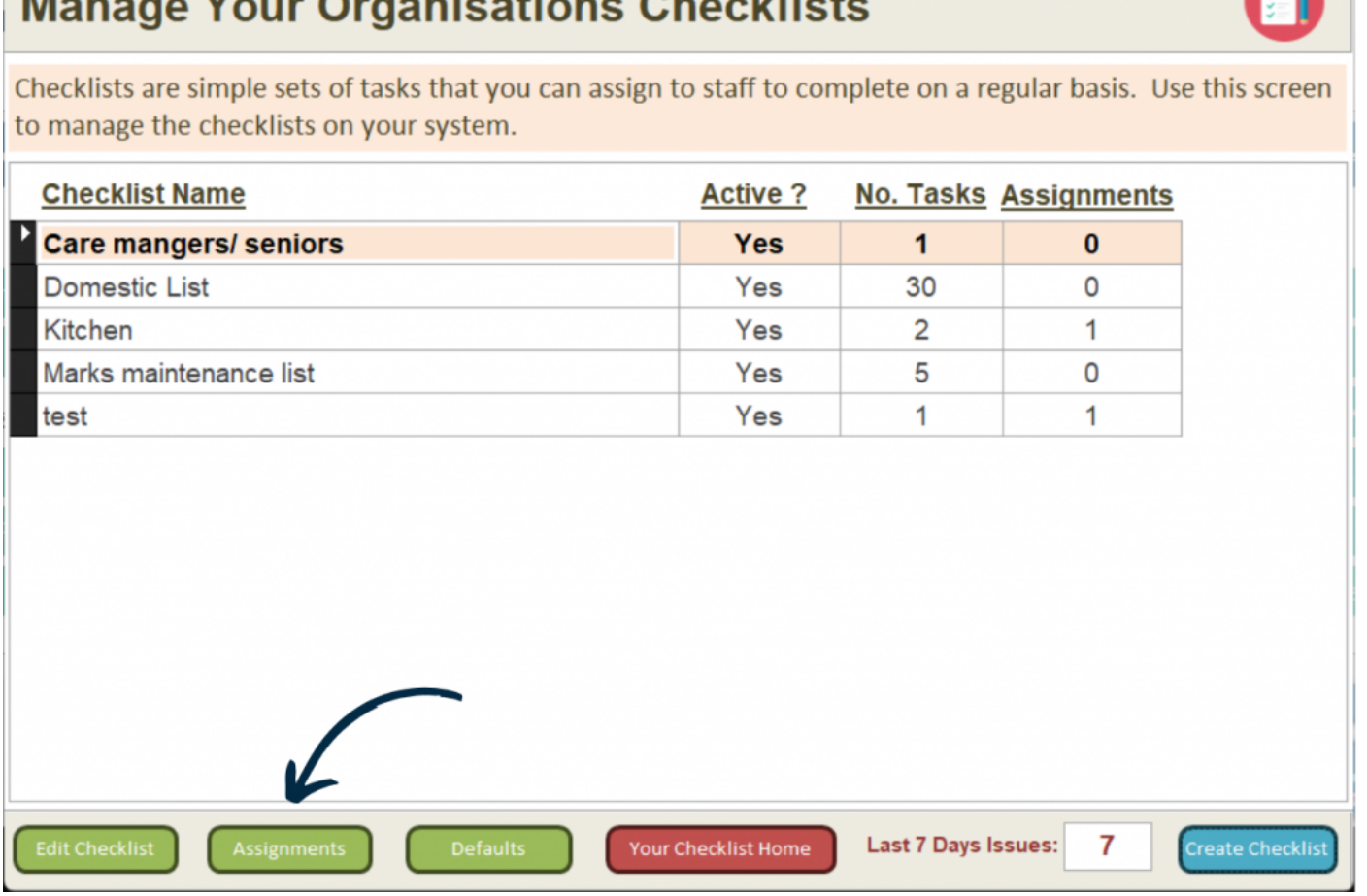
In Stage 2, choose the category or role of the staff you want to be able to collaborate on this checklist.

For example, if you want all *Care staff* to be able to work on this checklist, select them and press **Add**.

4

After doing so, continue to complete your new checklist, then, press **Save Changes**.


Stage 2 - Who can complete this checklist?
Define here who can complete this checklist. Only these staff members will be able to access and complete this checklist. Note, this is different from the assignment. If you do not specify any details below, anyone could complete this Checklist.
Options
By Staff Name
By Staff Role
By Staff Category
Selection List:
Agency
Care
Cook
Domestic
Management
Add >
Add All >>
< Remove
<< Remove All
Your Selection:
Care
Stage 3 - Does this Checklist repeat?
Select if this list will repeat and the frequency of the repetition.
Is this a repeating checklist?:
No
Start checklist today
Save Changes



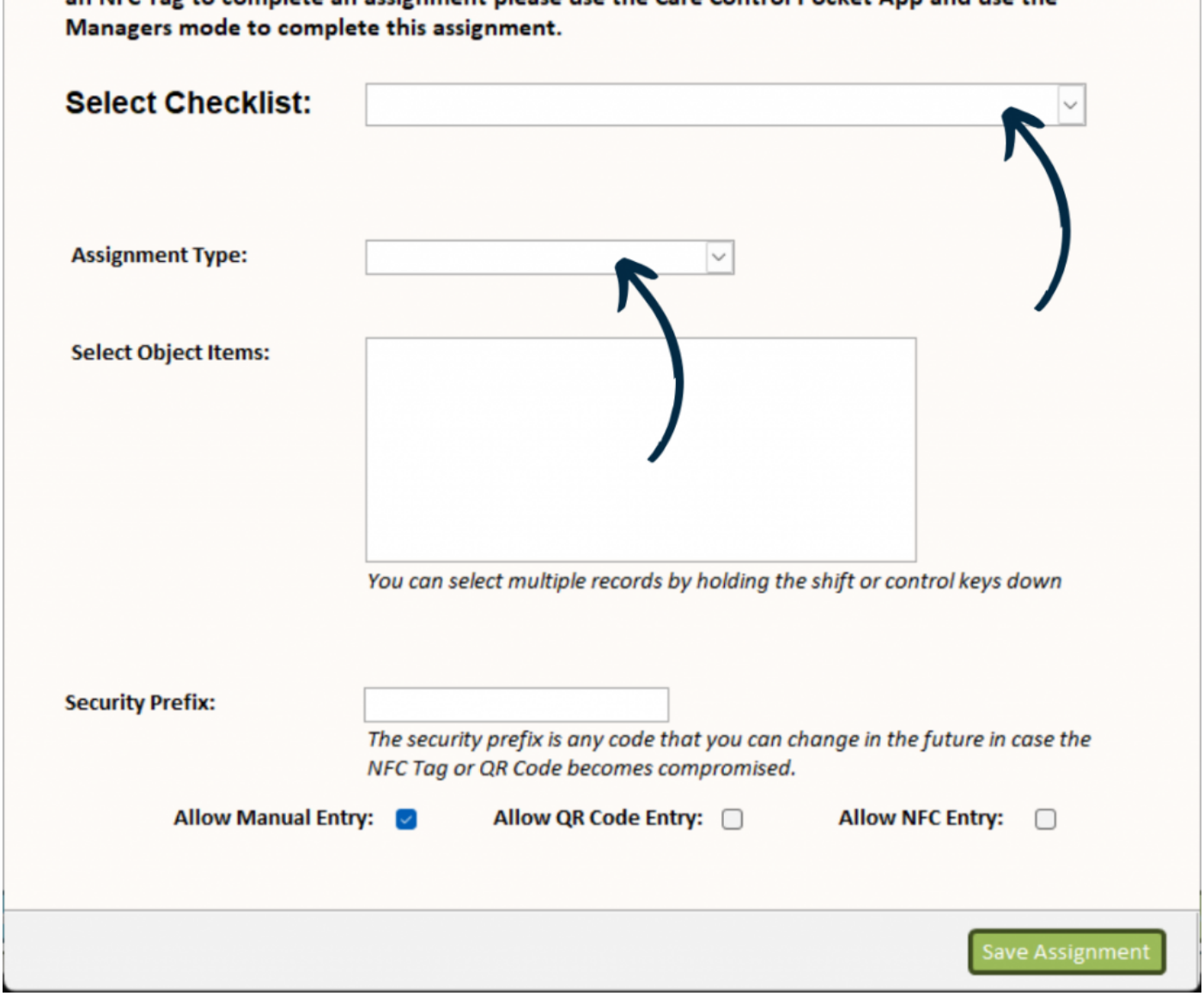
5

From the **Checklists** tool homepage, press **Assignments** from the options along the bottom of the window.

6

Then, press **Add New** to create a new assignment.


Remove Assignment
Generate QR Codes
Tip! Right click to filter records before producing QR Codes
Edit
Add New



7

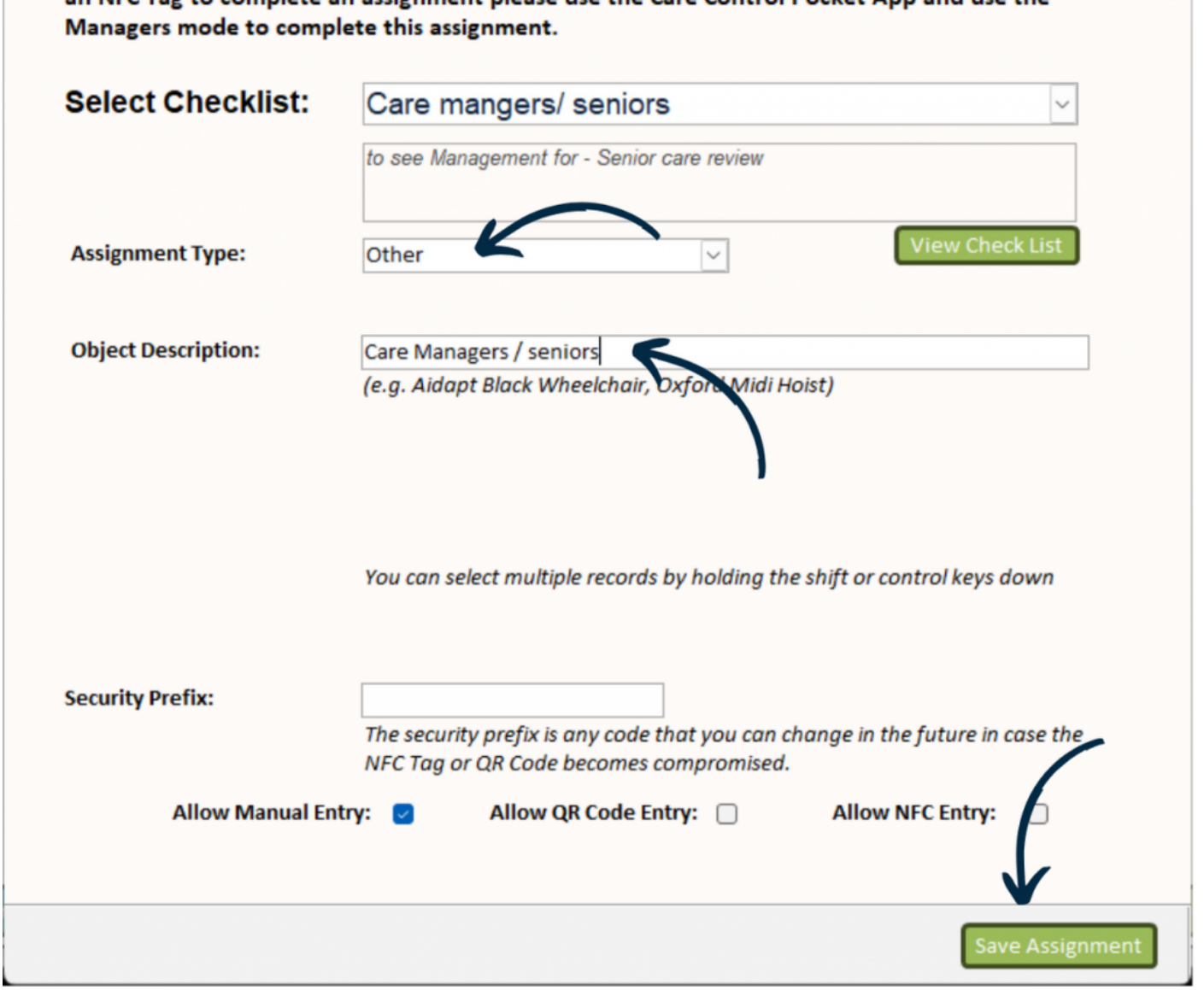
A blank form will open. Begin by choosing your checklist from the drop-down list.

Then, from the **Assignment Type** drop-down list, select **Other**.

8

Finally, enter the name of the checklist into the **Object Description** text box.

Press **Save Assignment** to complete the process.


Managers mode to complete this assignment.
Select Checklist:
Care mangers/ seniors
to see Management for - Senior care review
Assignment Type:
Other
View Check List
Object Description:
Care Managers / seniors
(e.g. Aidapt Black Wheelchair, Oxford Midi Hoist)
You can select multiple records by holding the shift or control keys down
Security Prefix:
The security prefix is any code that you can change in the future in case the NFC Tag or QR Code becomes compromised.
Allow Manual Entry:
Allow QR Code Entry:
Allow NFC Entry:
Save Assignment



9

Your new assignment will now appear in the list. This will allow any staff members with the chosen role / category to work on the same instance of a checklist, meaning they can collaborate to complete it.