How to Create a Checklist in Cloud

Communication · https://cclearninghub.co.uk/docs/how-to-create-a-checklist-in-cloud/

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Kieran Worth

This guide explains how to create and manage a custom recurring checklist within the Admin system, allowing you to structure tasks, assign responsibilities, and automate workflows.

Using checklists ensures consistency, improves efficiency, and reduces the risk of missed tasks. By standardising processes, staff can follow clear instructions, maintain accountability, and deliver reliable care without unnecessary errors or confusion.

By following this guide, you will learn how to:

- Create a new checklist from scratch
- Configure scheduling, visibility, and shift settings
- Set recurrence patterns for ongoing task automation
- Assign checklists to staff, teams, or locations
- Add and customise individual tasks within the checklist
- Control permissions and completion requirements
- Generate QR codes to support task completion

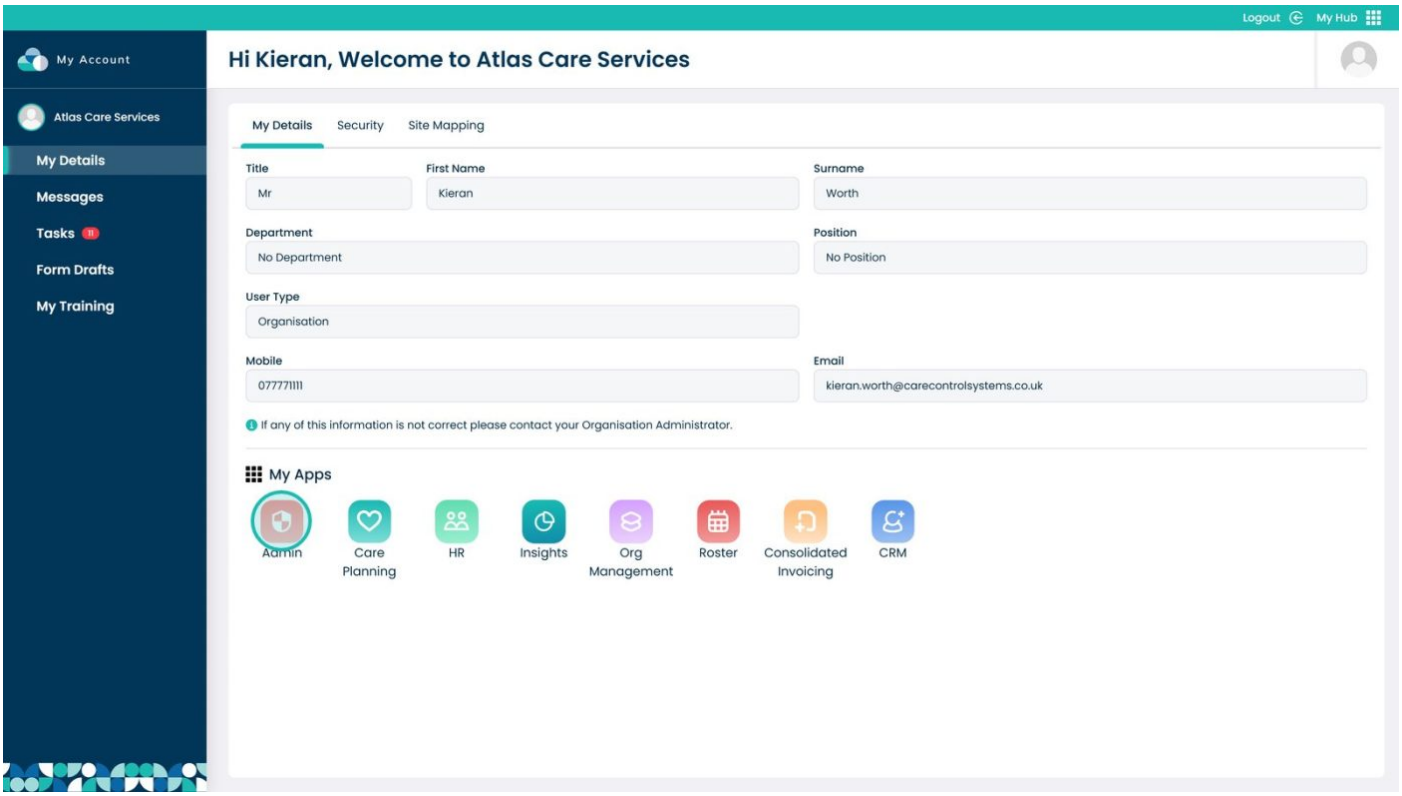
This ensures your organisation can deliver structured, repeatable workflows that improve efficiency, maintain compliance, and support high-quality care delivery.

Interactive Guide

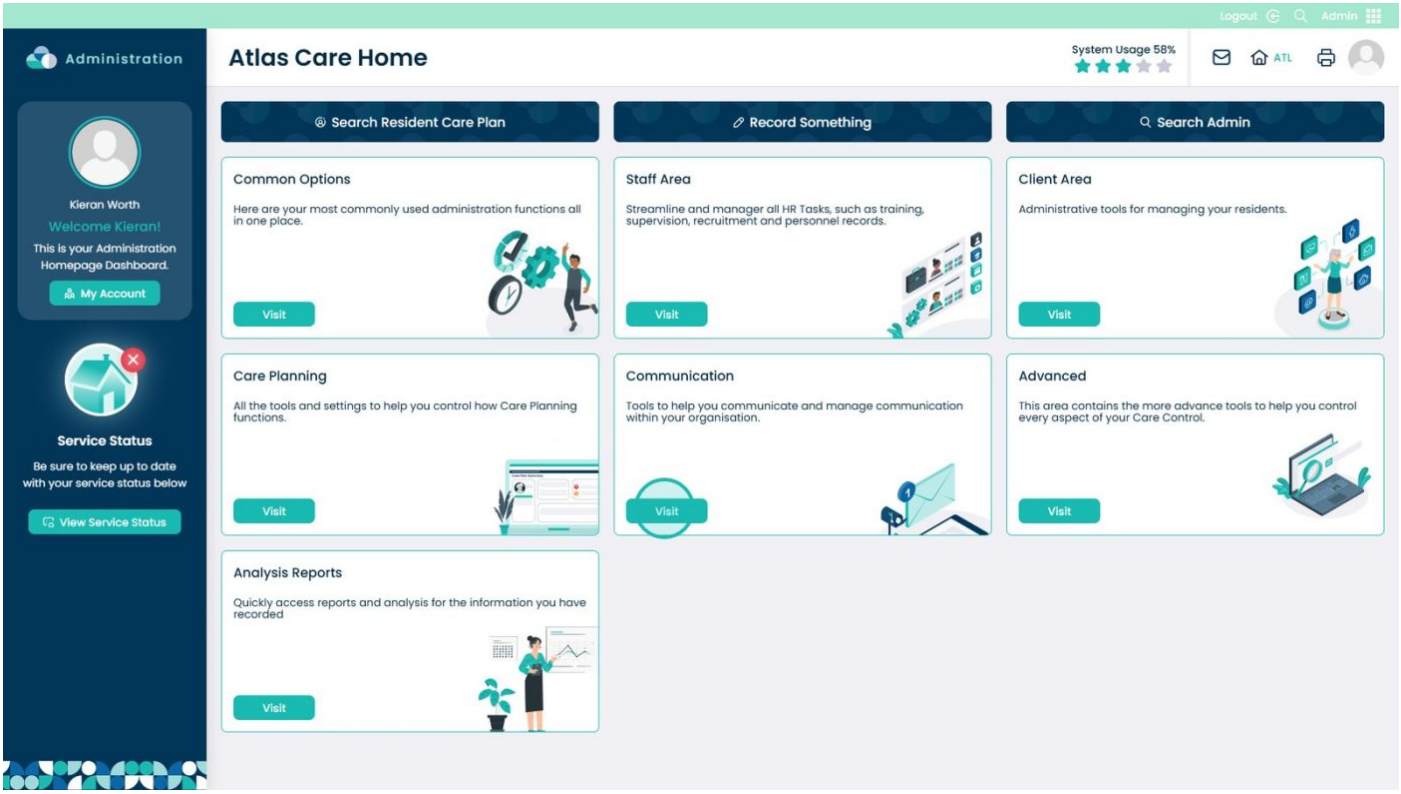
Embedded media:
https://demo.arcade.software/eC0tjUMjde2ET3u6wmmW?embed&embed_mobile=tab&embed_desktop=inline&show_copy_

Text based guide

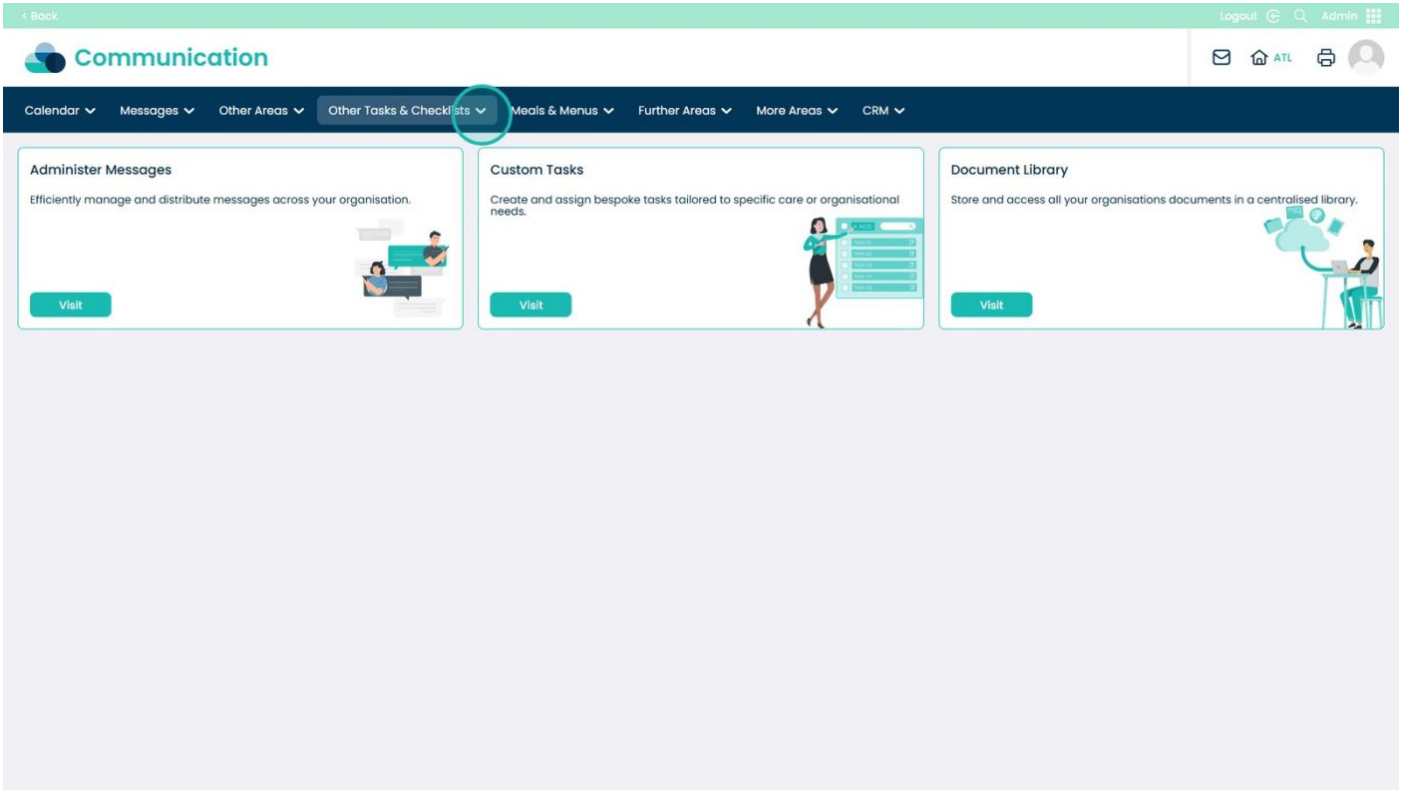
Launch the Admin app to access all administrative tools.



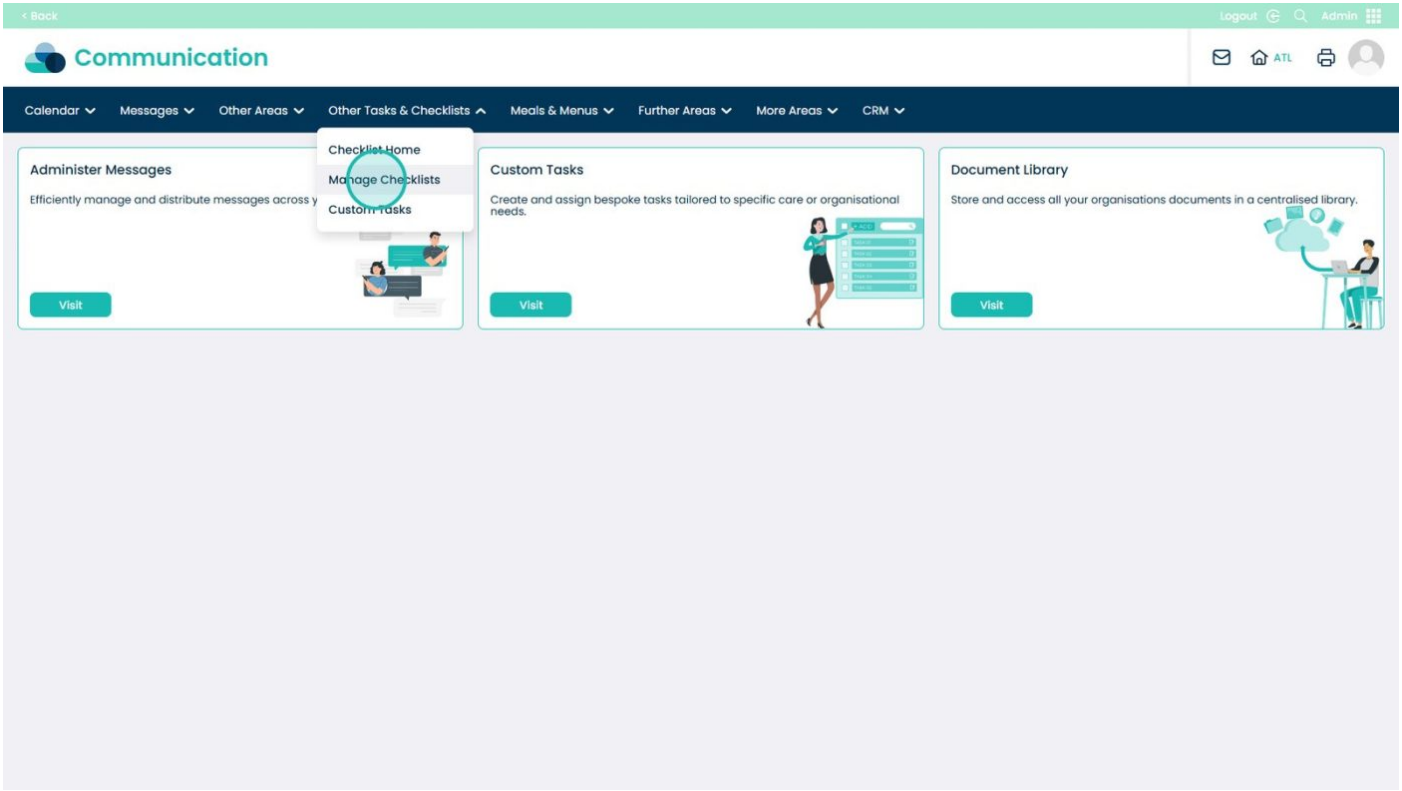
Click the Communication section to manage staff and client messaging.



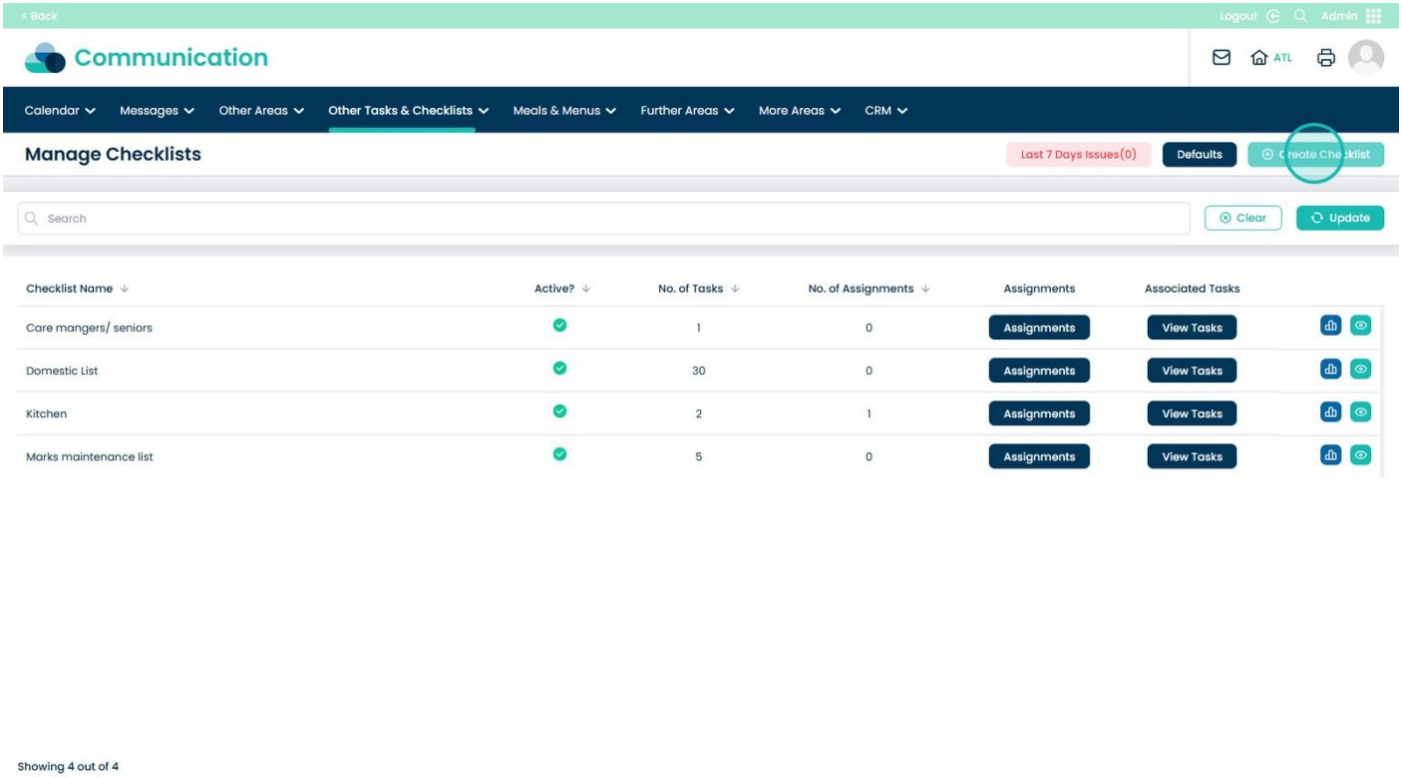
Expand the Other Tasks & Checklists menu to access checklist features.



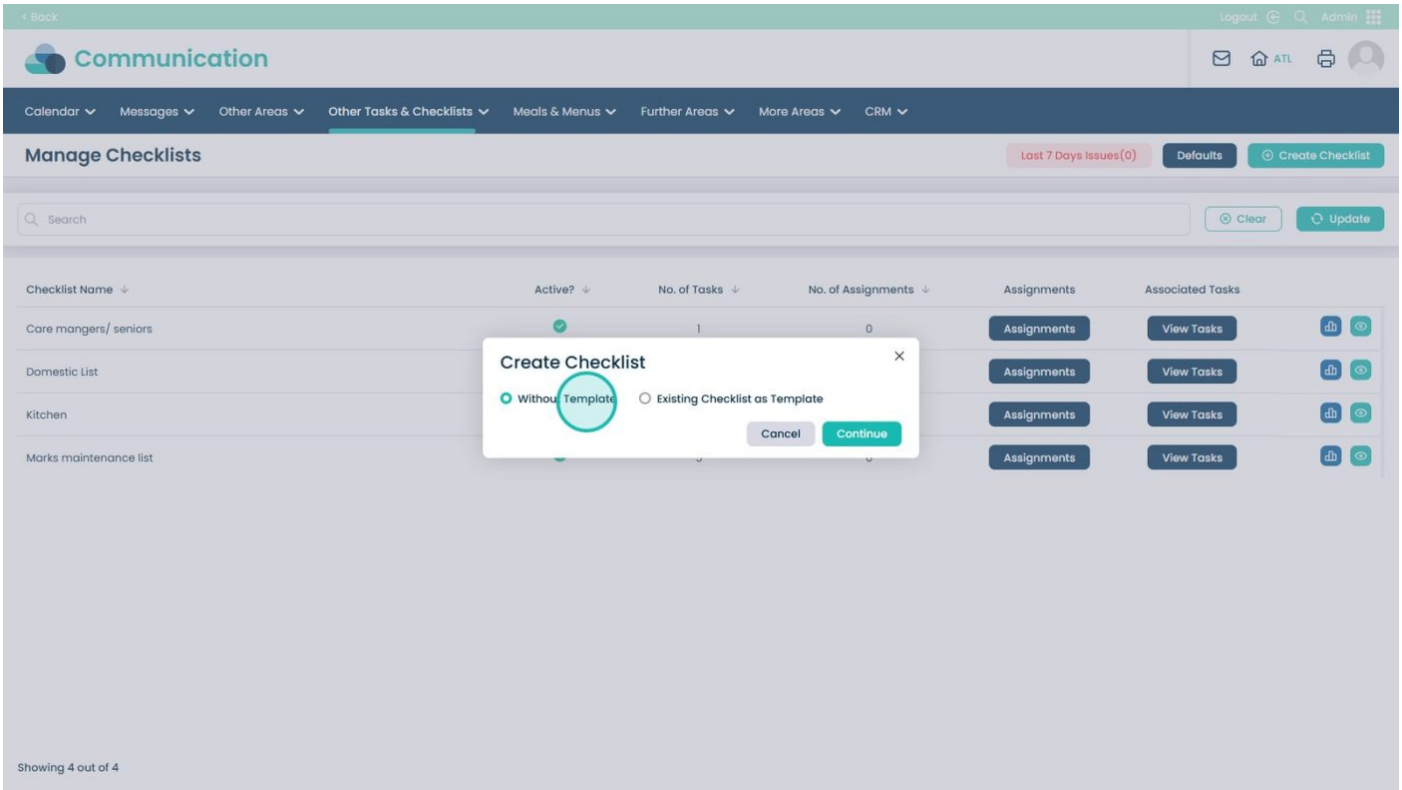
Click Manage Checklists to view and manage existing checklists.



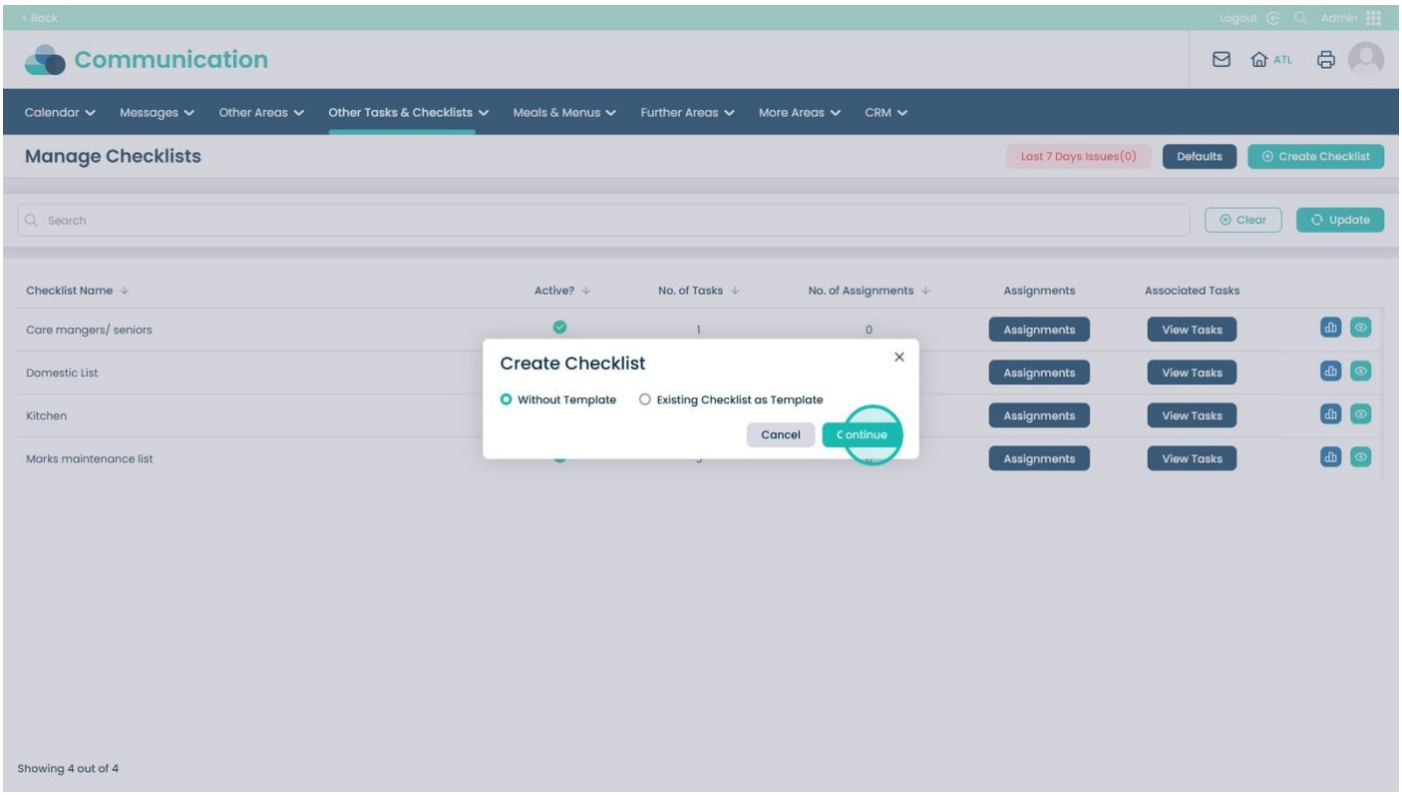
Click the Create Checklist button to start building a new workflow.



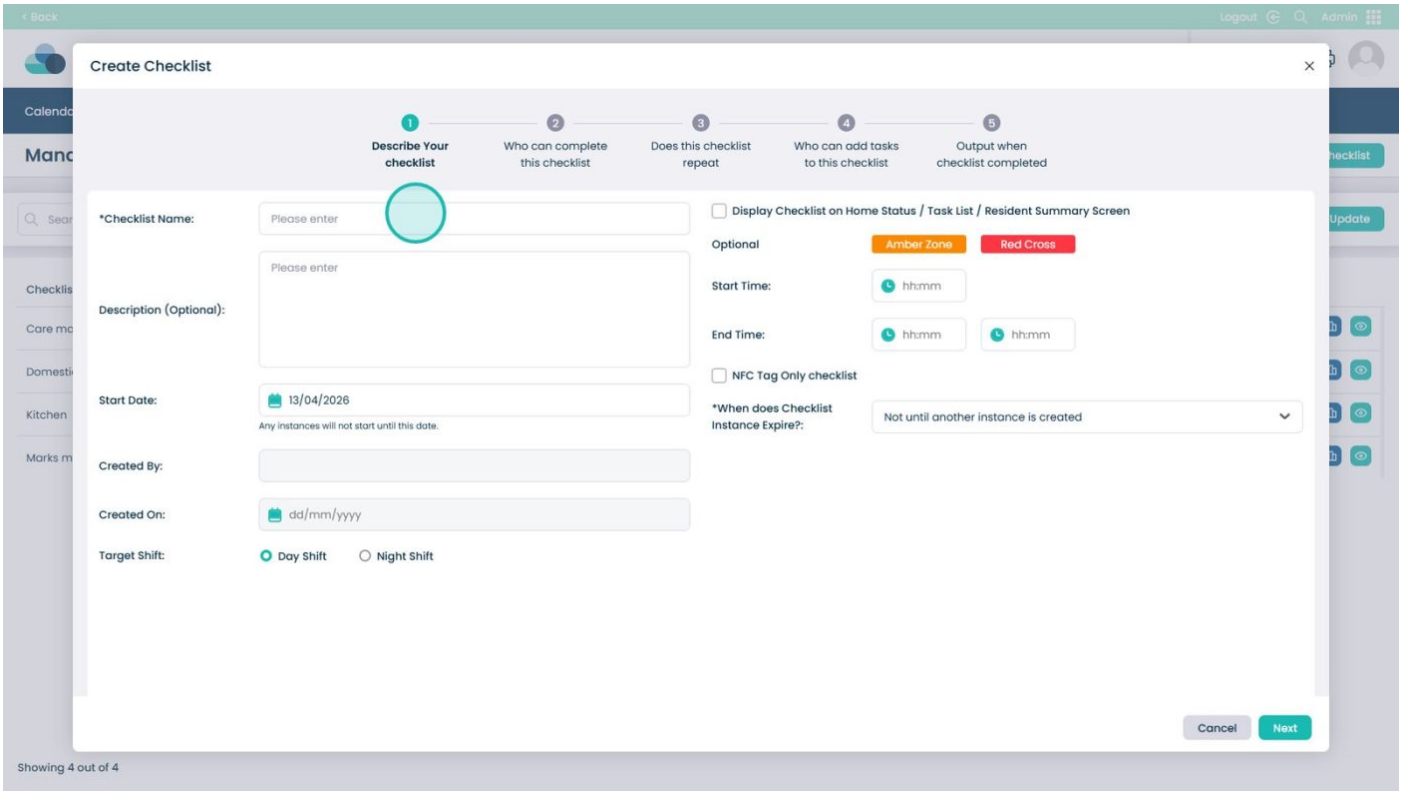
Select Without Template to create a checklist from scratch.



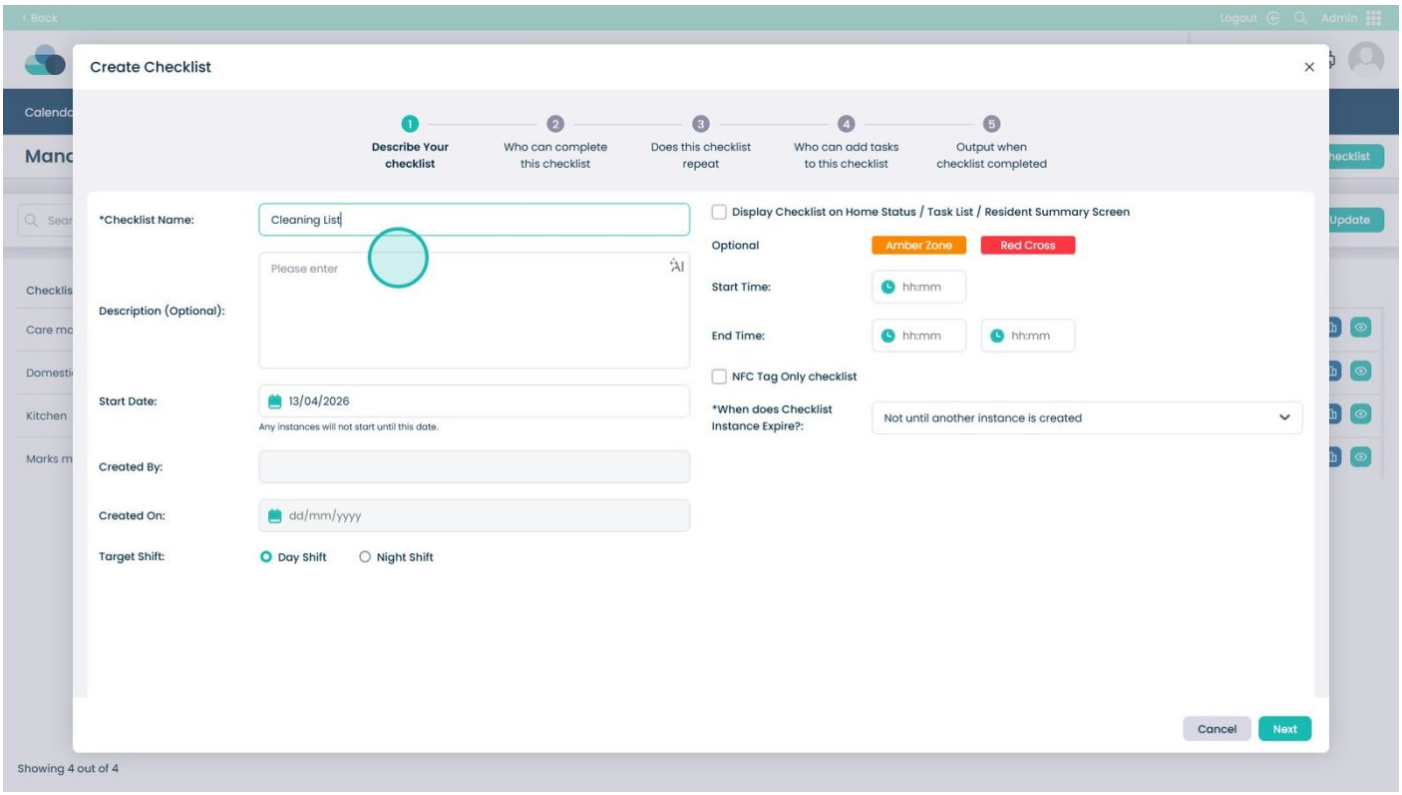
Click Continue to proceed with the checklist setup.



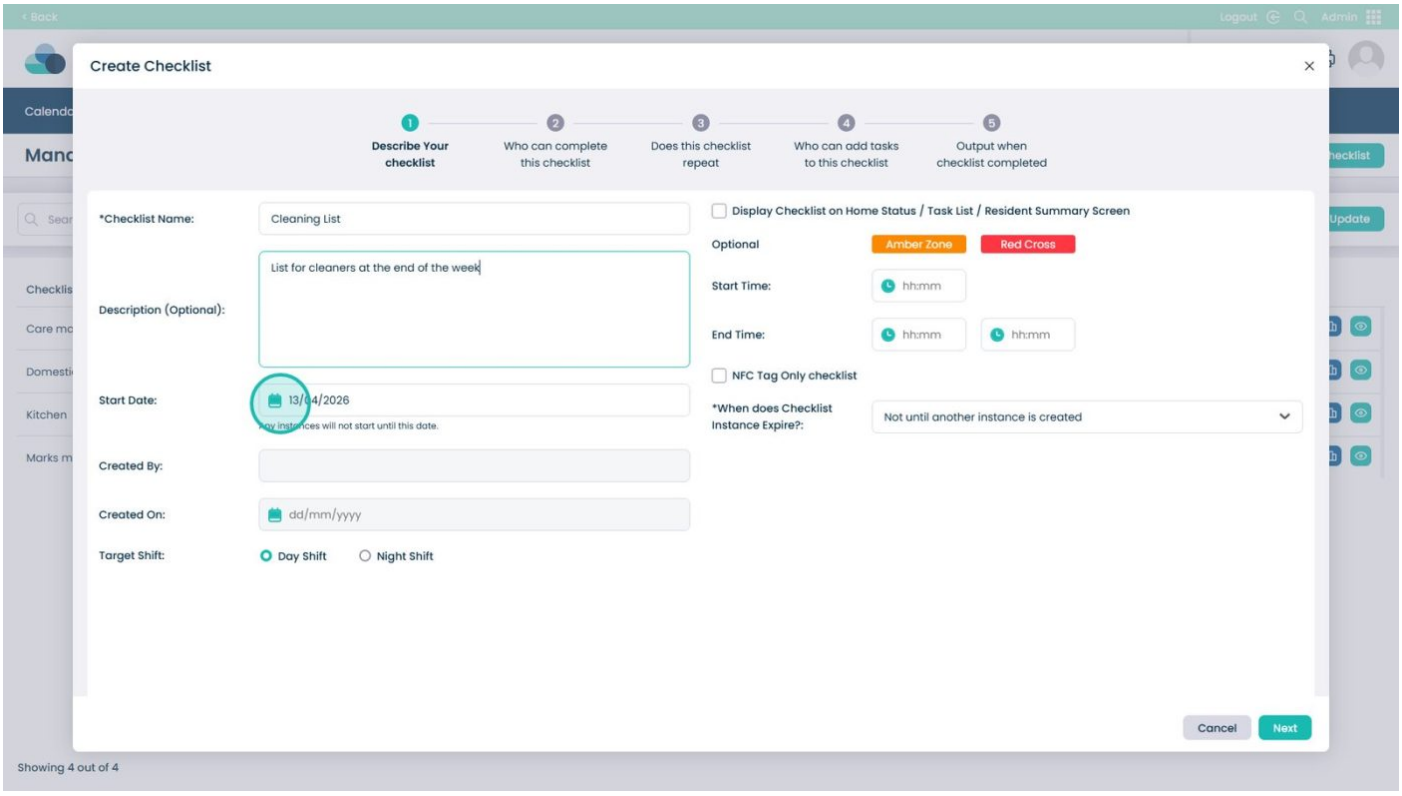
Enter a clear and descriptive checklist name.



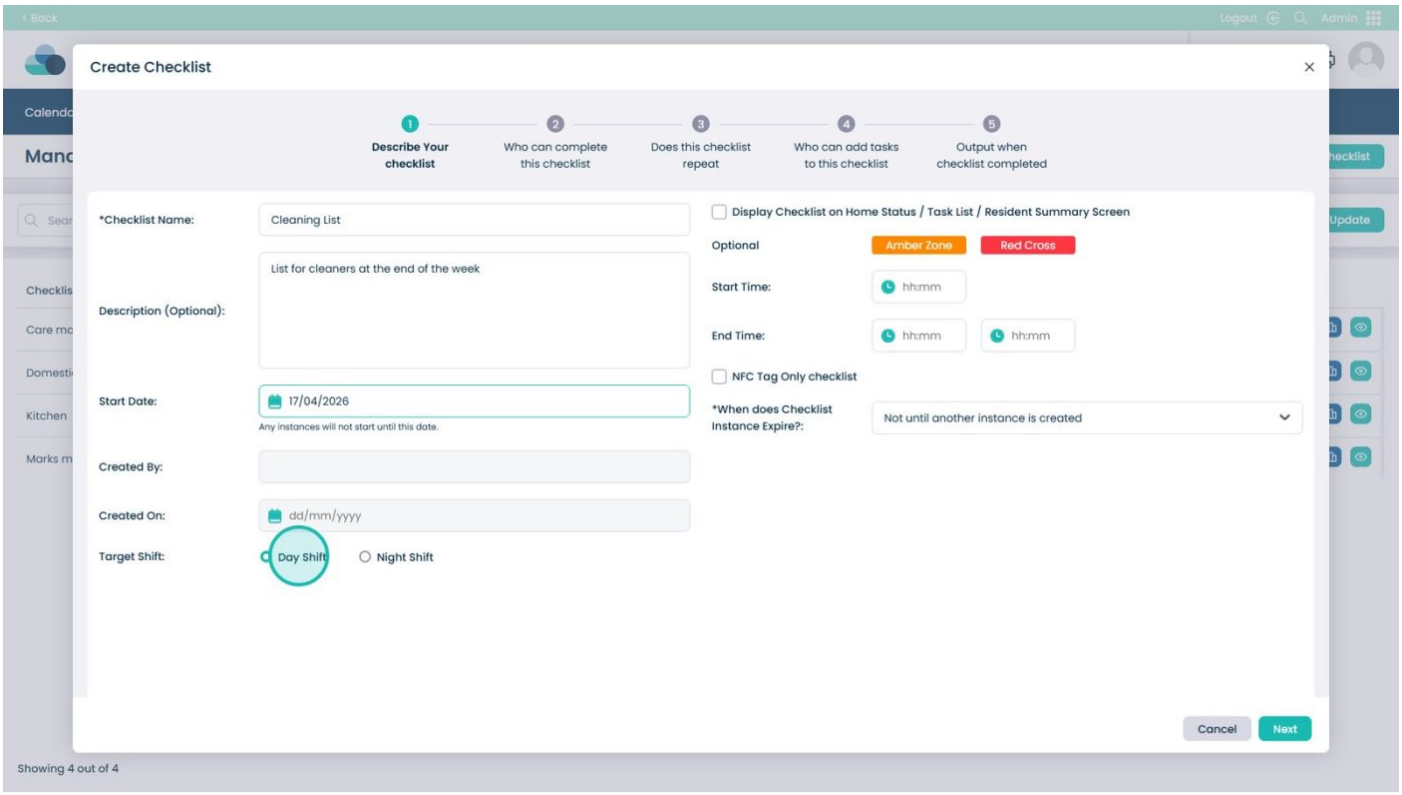
Add a description to explain the purpose of the checklist.



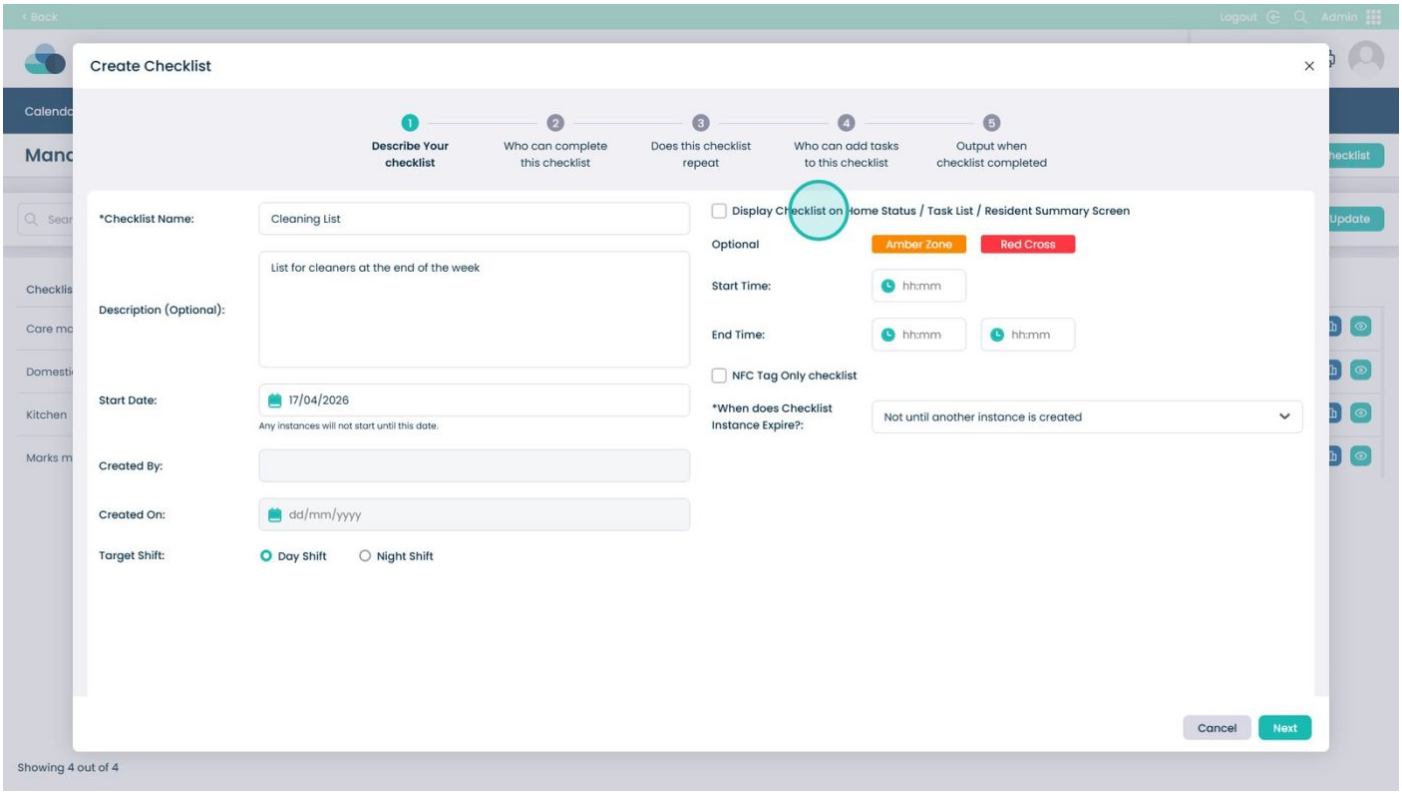
Select the go-live date to control when the checklist becomes active.



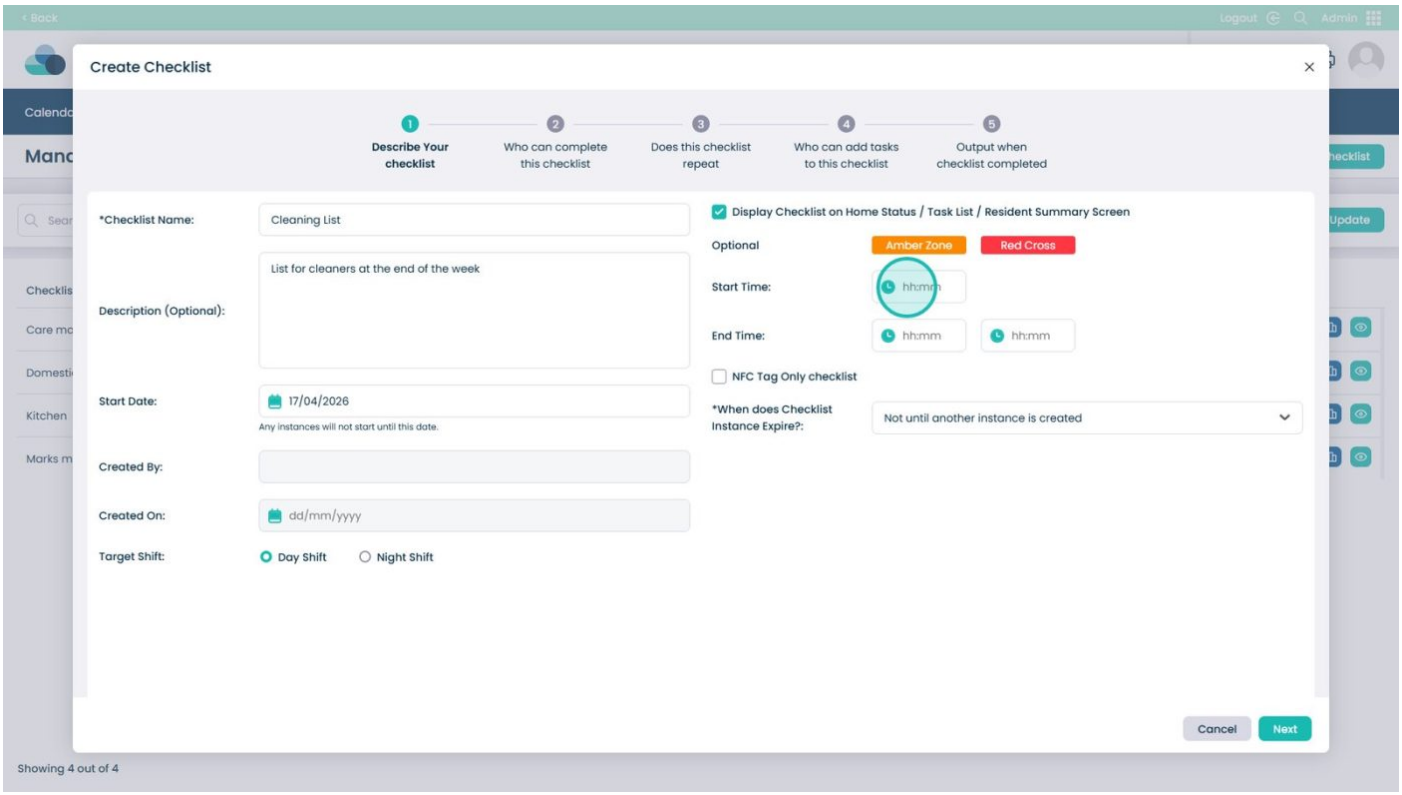
Select the shift to define which staff group will complete the checklist.



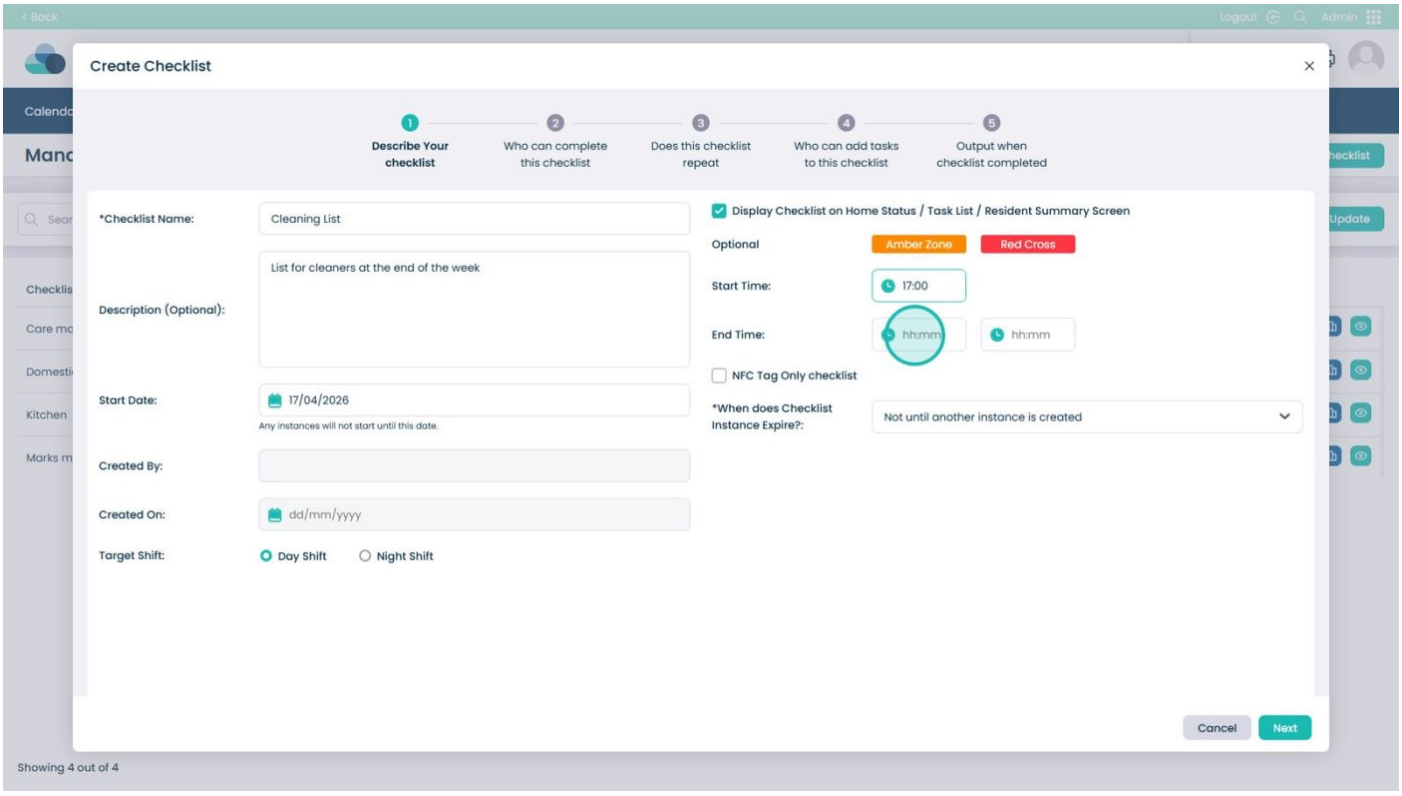
Enable visibility settings to ensure staff can easily access the checklist.



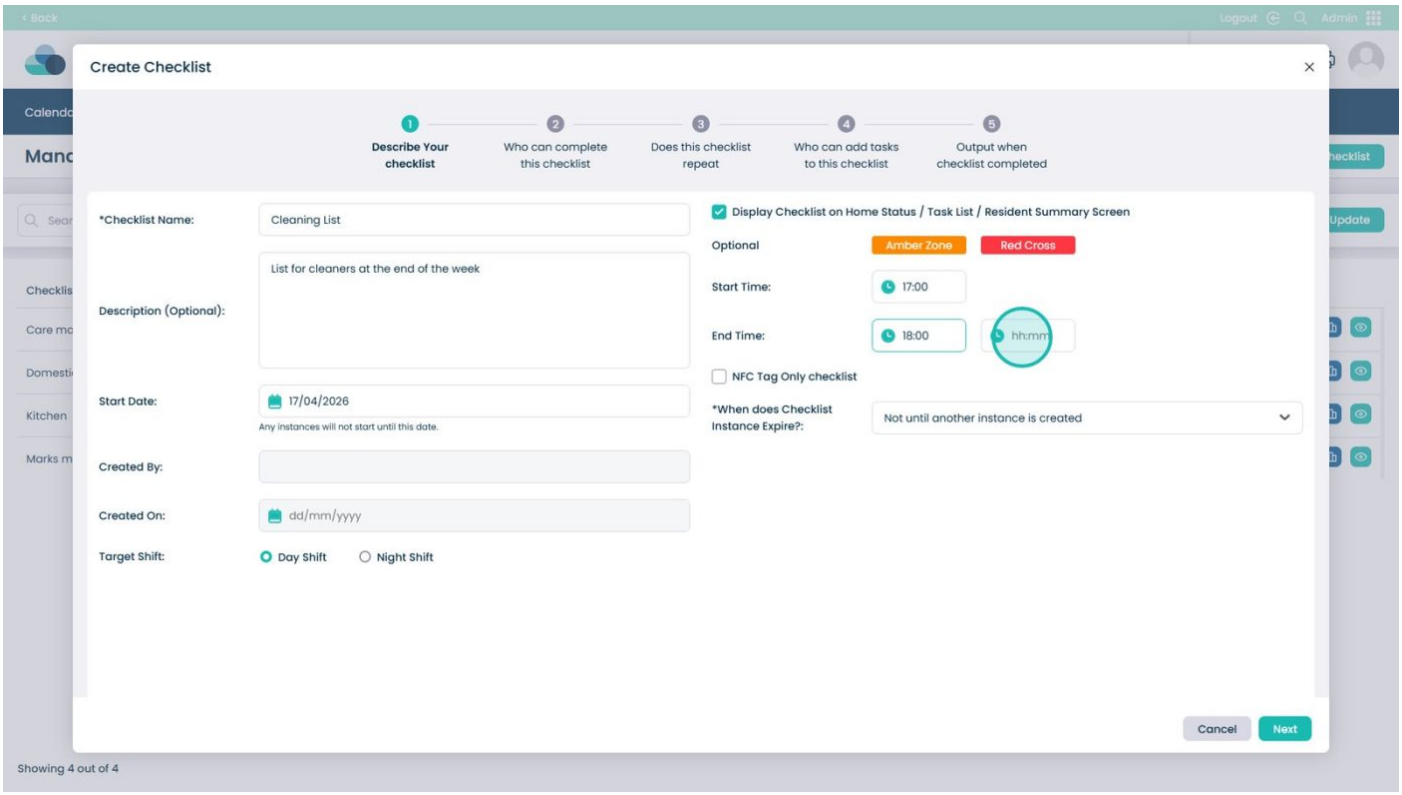
Set the start time to control when the checklist becomes active each day.



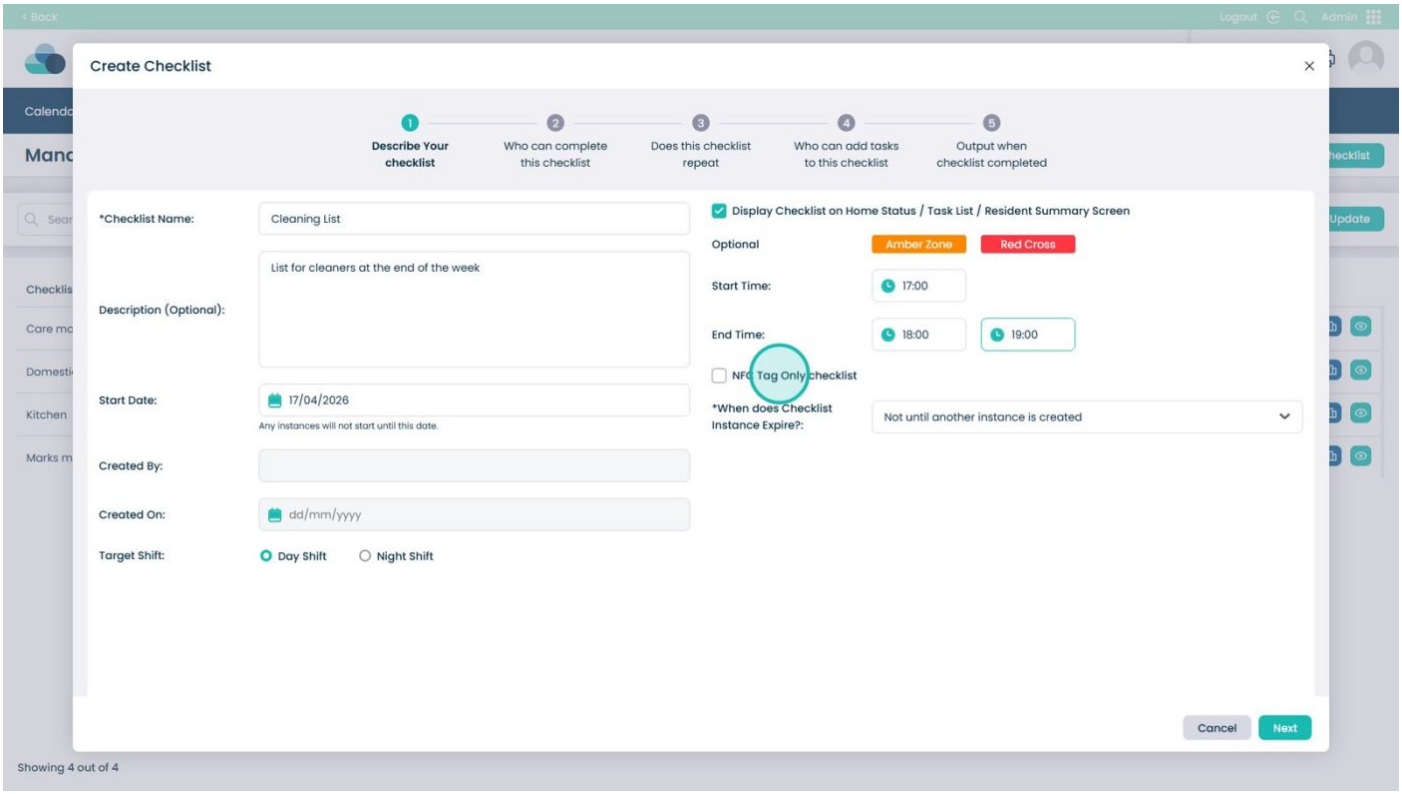
Set the end time to define when checklist tasks should be completed.



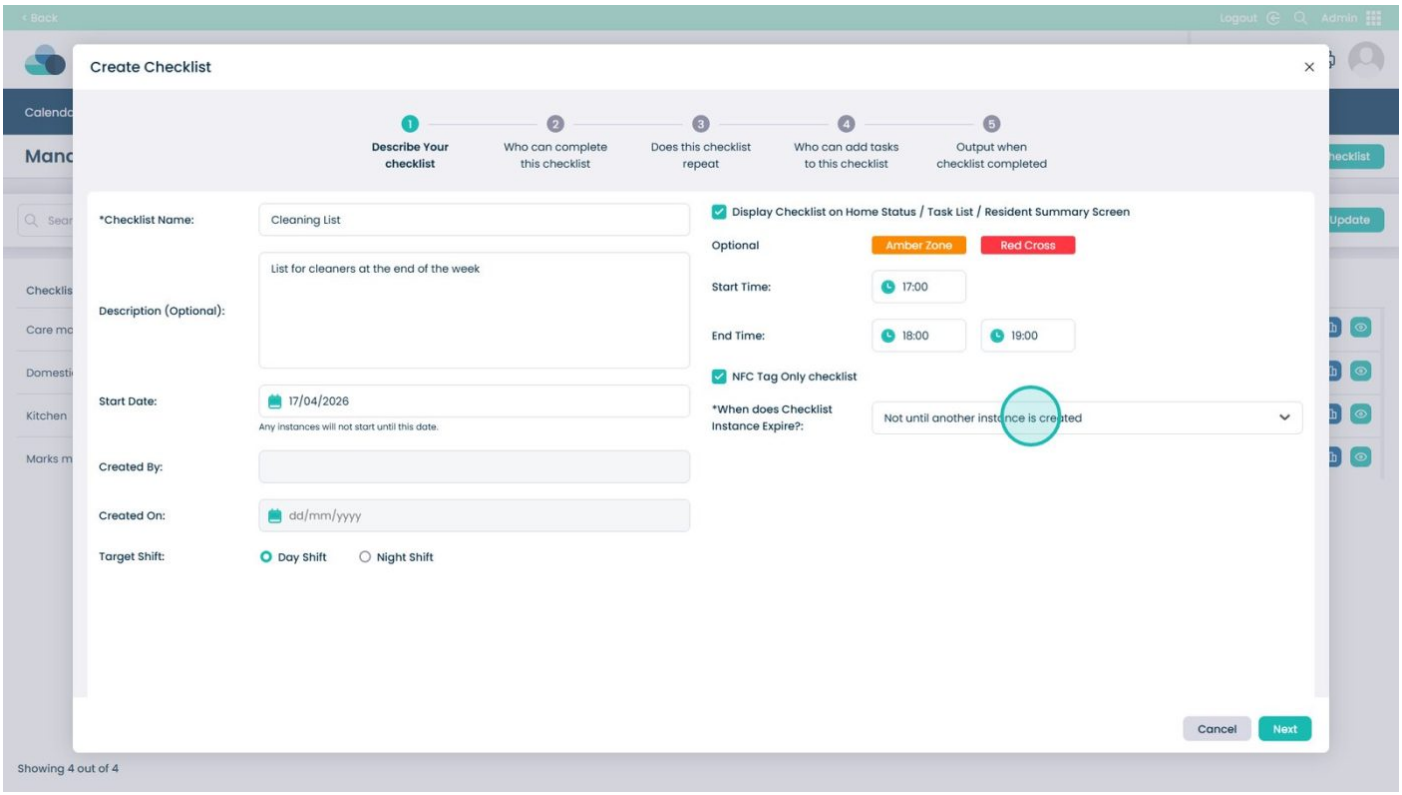
Understand that incomplete checklists will be marked if not finished on time.



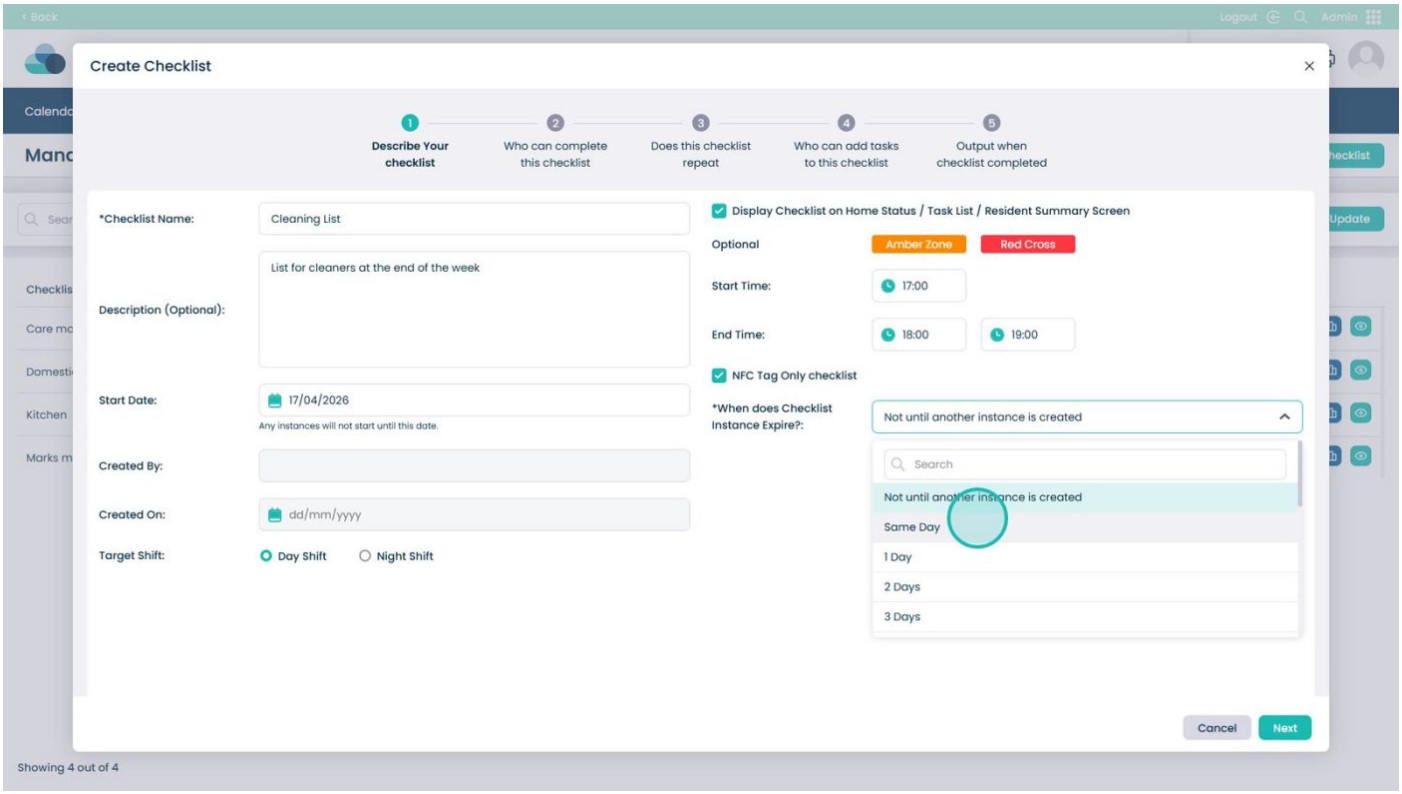
Enable NFC Tag Only to require location-based task completion.



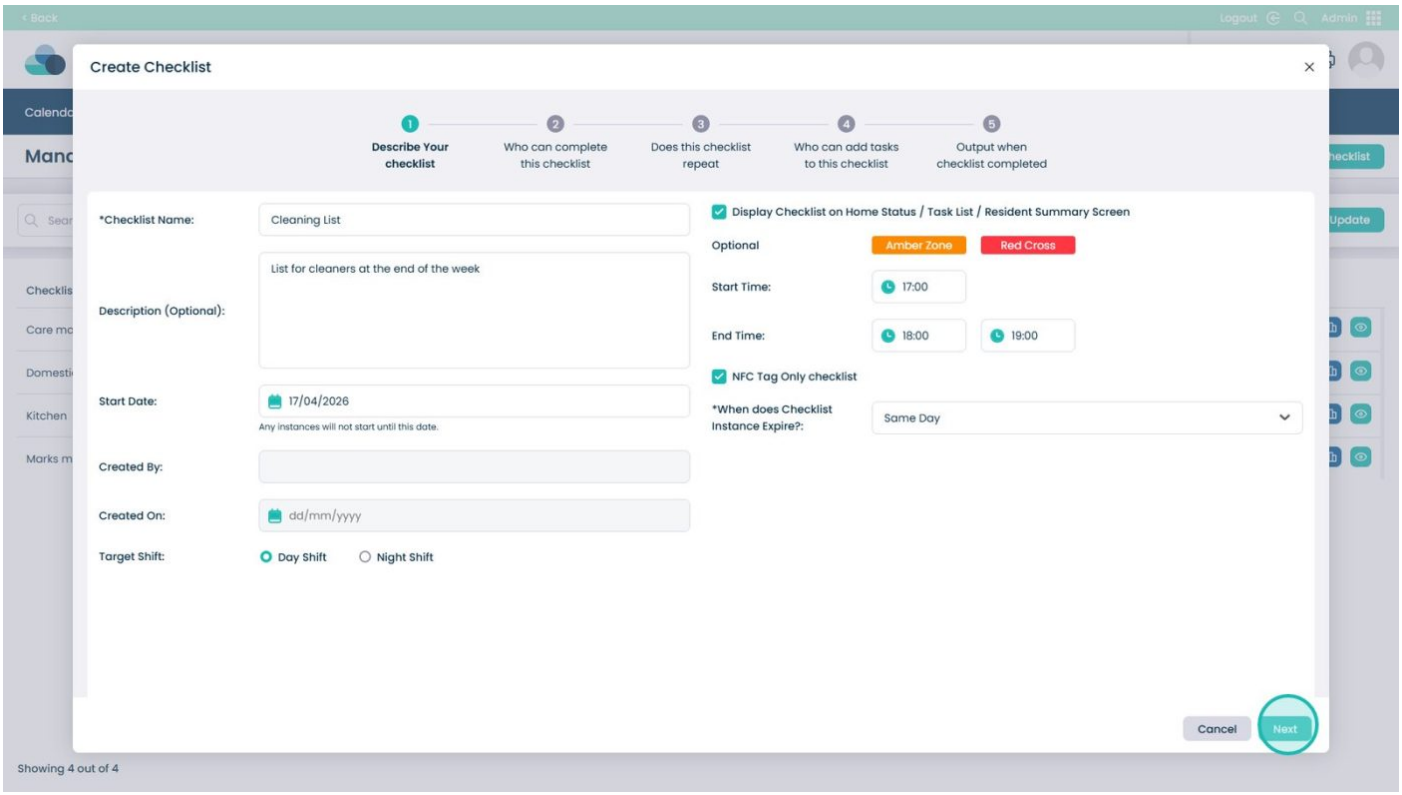
Adjust checklist expiry settings to control task lifecycle.



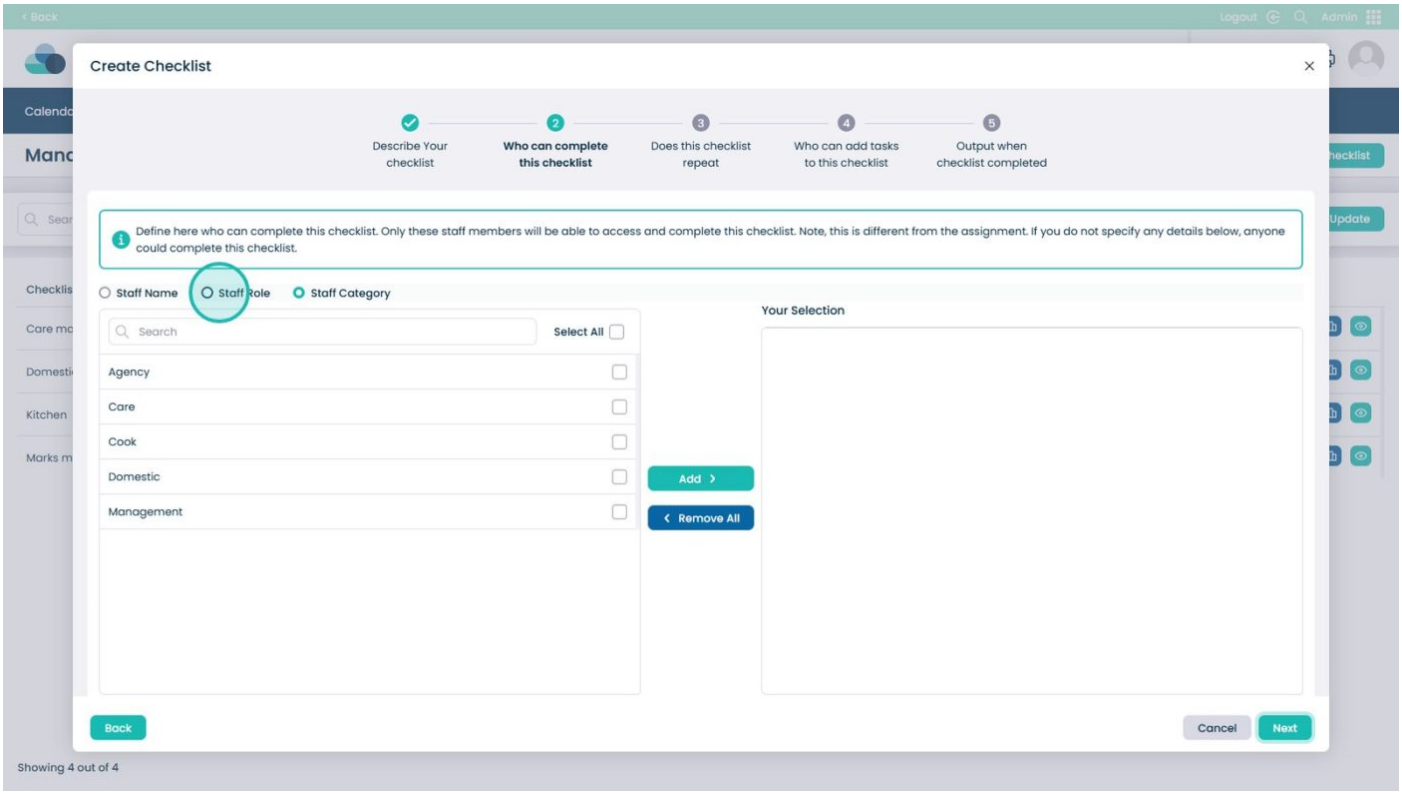
Select Same Day to ensure the checklist expires on the day it is created.



Click Next to proceed after configuring the checklist settings.



Select Staff Role to assign checklist access based on job roles.



Select the appropriate team to receive this checklist.

Click Add to confirm assignment permissions.

Click Next to continue to the recurrence setup.

Enable recurrence to automate checklist creation.

Select Weekly as the recurrence pattern to schedule ongoing tasks.

Set how often the checklist repeats by defining the frequency.

Select the specific days for the checklist to run.

Refresh example instances to preview when the checklist will appear.

Continue to the next step to finalise recurrence settings.

Restrict editing permissions to admin users for better control.

Continue configuring checklist permissions.

Enable automatic note creation when the checklist is fully completed.

Customise the output template for completion notes.

Edit the template to include all required information.

Add placeholders to personalise completion notes.

Save the custom output template.

Save the checklist to activate it.

Open View Tasks to begin adding checklist items.

Click Add Task to create a new checklist item.

Enter a clear task description.

Set the priority level for the task.

Enable free text entry to allow additional notes.

Allow optional entries for flexible task completion.

Save the task to add it to your checklist.

Close the tasks window to return to the checklist overview.

Open Assignments to define where tasks will take place.

Create a new assignment to link the checklist to staff or locations.

Select the assignment type.

Choose the required assignment option from the list.

Select the specific room if applicable.

Save the assignment once complete.

Generate QR codes to support checklist completion.

Select which QR codes to print and the format required.

Download and print the QR code PDF.

Review the generated output or final screen.

Was it helpful ?

- Happy
- Normal
- Sad

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