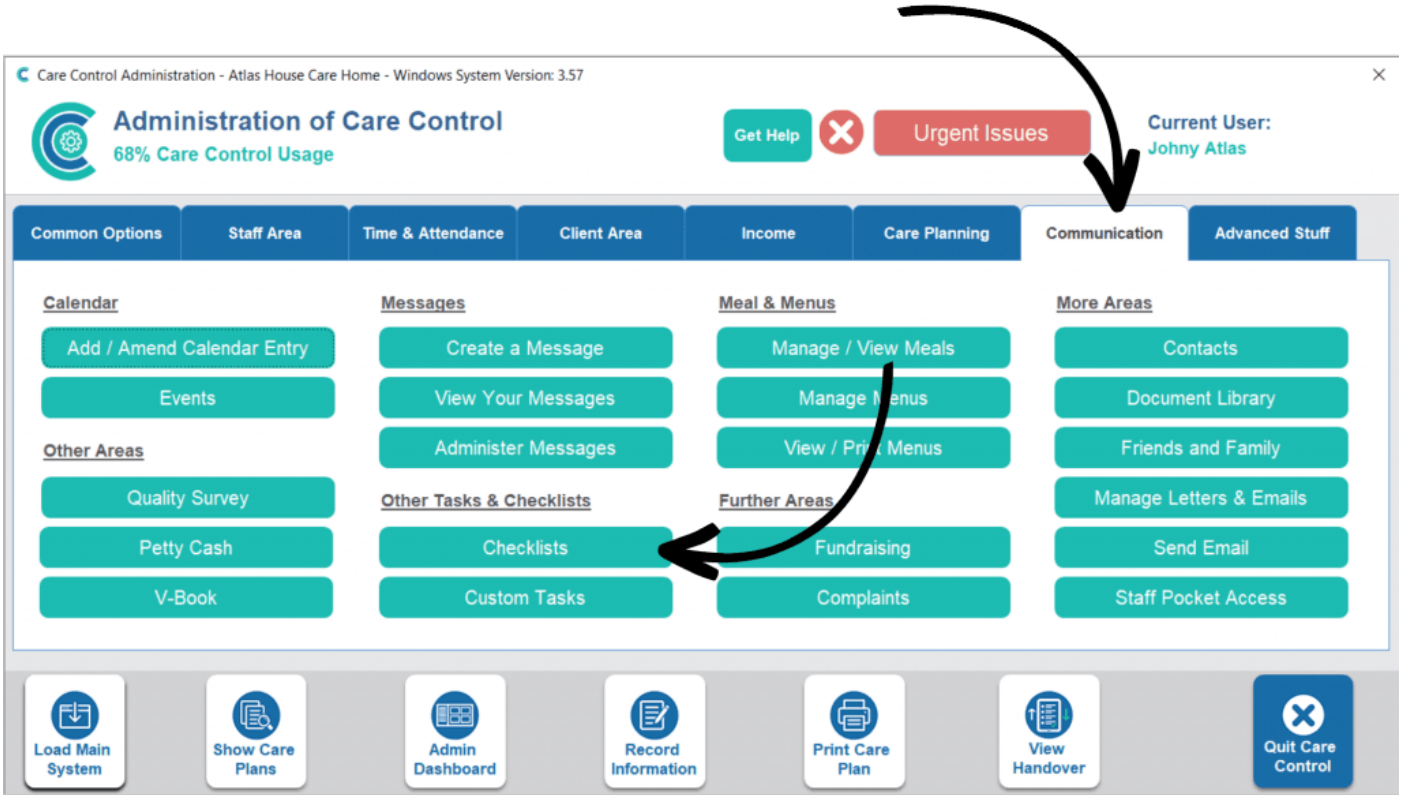
How to Create a Checklist

Checklists Windows · https://cclearninghub.co.uk/docs/how-to-create-a-checklist/

How to Create a Checklist

This guide will cover how to create a checklist on Care Control Windows. This feature allows a list of tasks to be created and assigned to staff or service users. This feature is useful for staff when completing jobs which contain multiple stages.

Embedded media:
https://player.vimeo.com/video/815247363?color&autopause=0&loop=0&muted=0&title=1&portrait=1&byline=1&h=8864



1

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

2

A new window will open. Here you can view already created checklists and open analysis for them. To create a new one, press **Create Checklist** in the bottom right-hand corner of the window.


Your System Checklists...
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
Domestic List
Yes
30
0
Kitchen
Yes
2
1
Marks maintenance list
Yes
5
0
Edit Checklist
Assignments
Defaults
Your Checklist Home
Last 7 Day
Issues:
6
Create Checklist

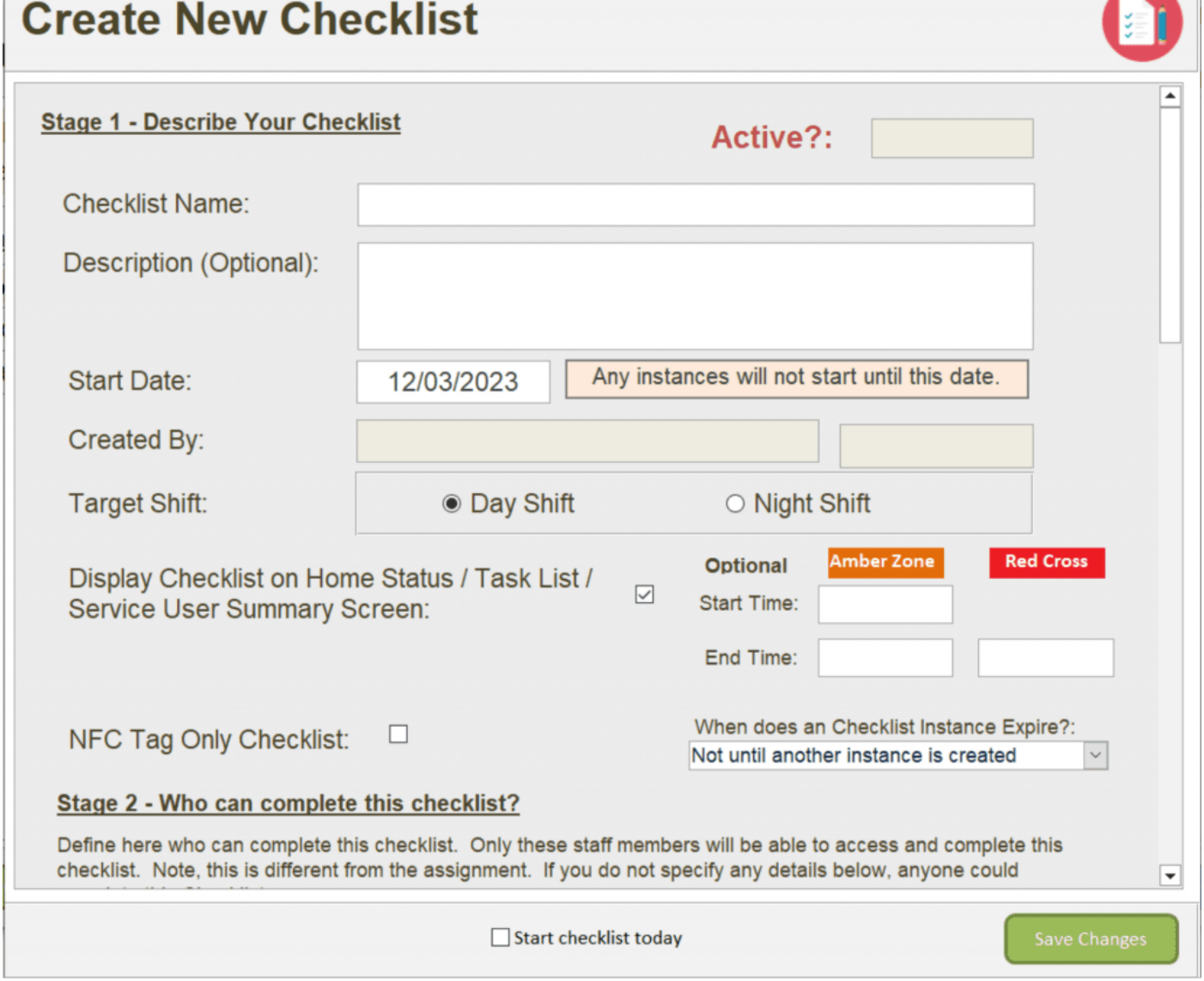


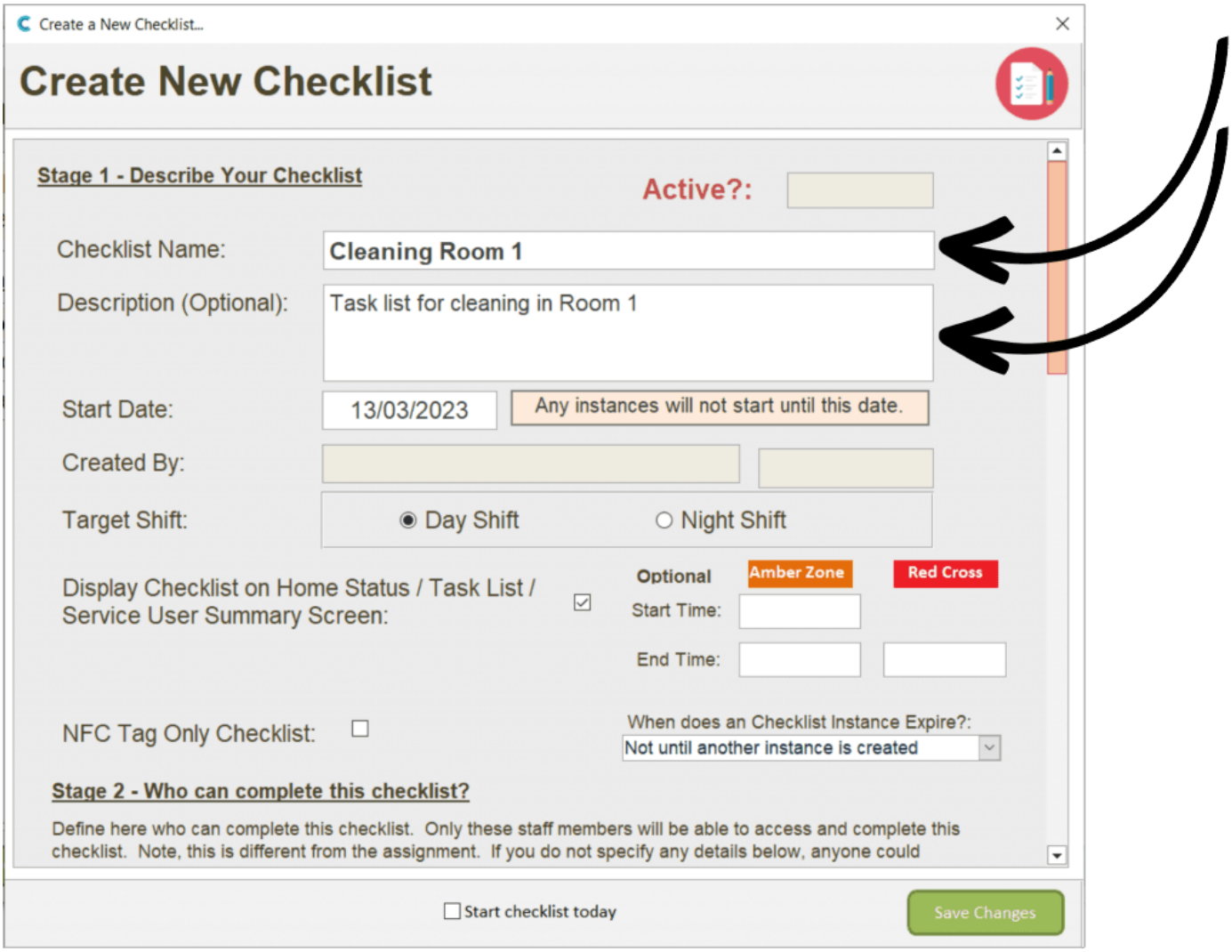
3

You can choose to base the new checklist off an existing one via a template. Press **Continue**.

4

A blank form will open. This is where you can enter the details about the checklist.


Create New Checklist
Stage 1 - Describe Your Checklist
Active?:
Checklist Name:
Description (Optional):
Start Date:
12/03/2023
Any instances will not start until this date.
Created By:
Target Shift:
Day Shift
Night Shift
Display Checklist on Home Status / Task List / Service User Summary Screen:
Optional
Amber Zone
Red Cross
Start Time:
End Time:
NFC Tag Only Checklist:
When does an Checklist Instance Expire?:
Not until another instance is created
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
Start checklist today
Save Changes

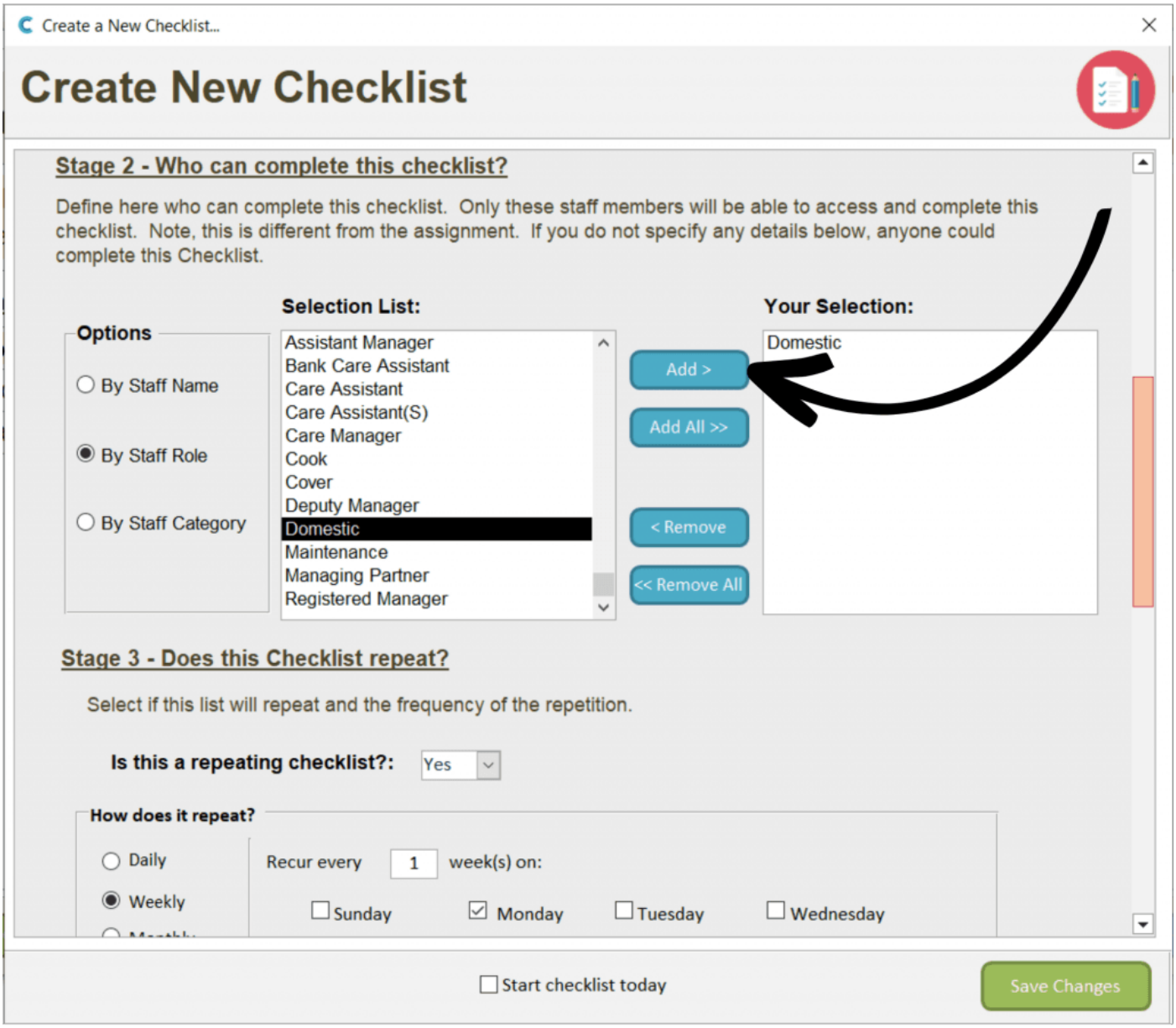


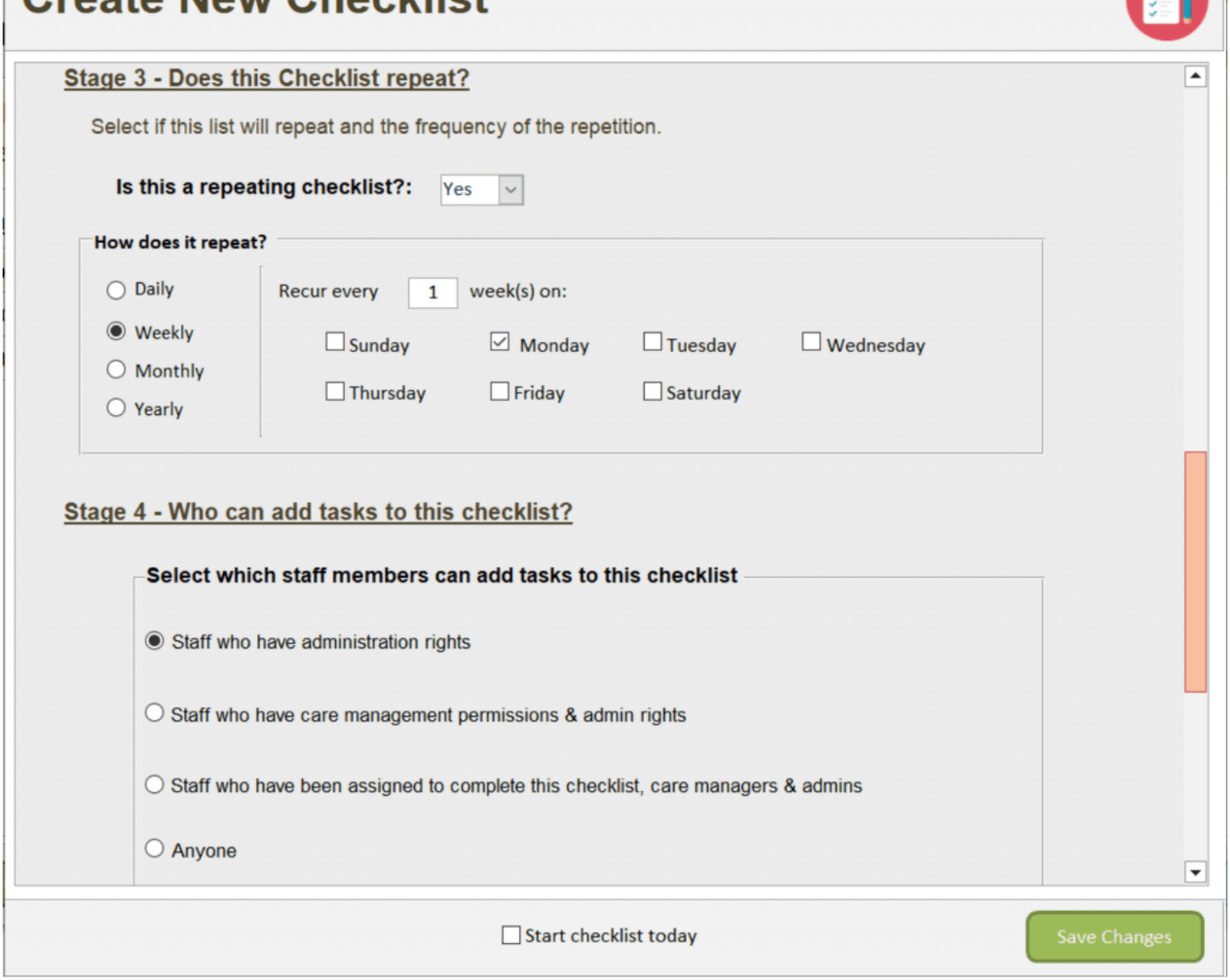
5

Enter a **Name**, **Description** and **Start Date** for the checklist. Next, select a **Target Shift** and choose whether it will show on the **Home Status**. You can also set this checklist to be NFC tag compatible.

You can use the **Amber** and **Red Zones** to set out times when the checklist will appear on the home status as an amber and red warning.

6


Create a New Checklist...
Create New Checklist
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.
Selection List:
Your Selection:
Options
By Staff Name
By Staff Role
By Staff Category
Assistant Manager
Bank Care Assistant
Care Assistant
Care Assistant(S)
Care Manager
Cook
Cover
Deputy Manager
Domestic
Maintenance
Managing Partner
Registered Manager
Add >
Add All >>
< Remove
<< Remove All
Domestic
Stage 3 - Does this Checklist repeat?
Select if this list will repeat and the frequency of the repetition.
Is this a repeating checklist?:
Yes
How does it repeat?
Daily
Weekly
Recur every
1
week(s) on:
Sunday
Monday
Tuesday
Wednesday
Start checklist today
Save Changes



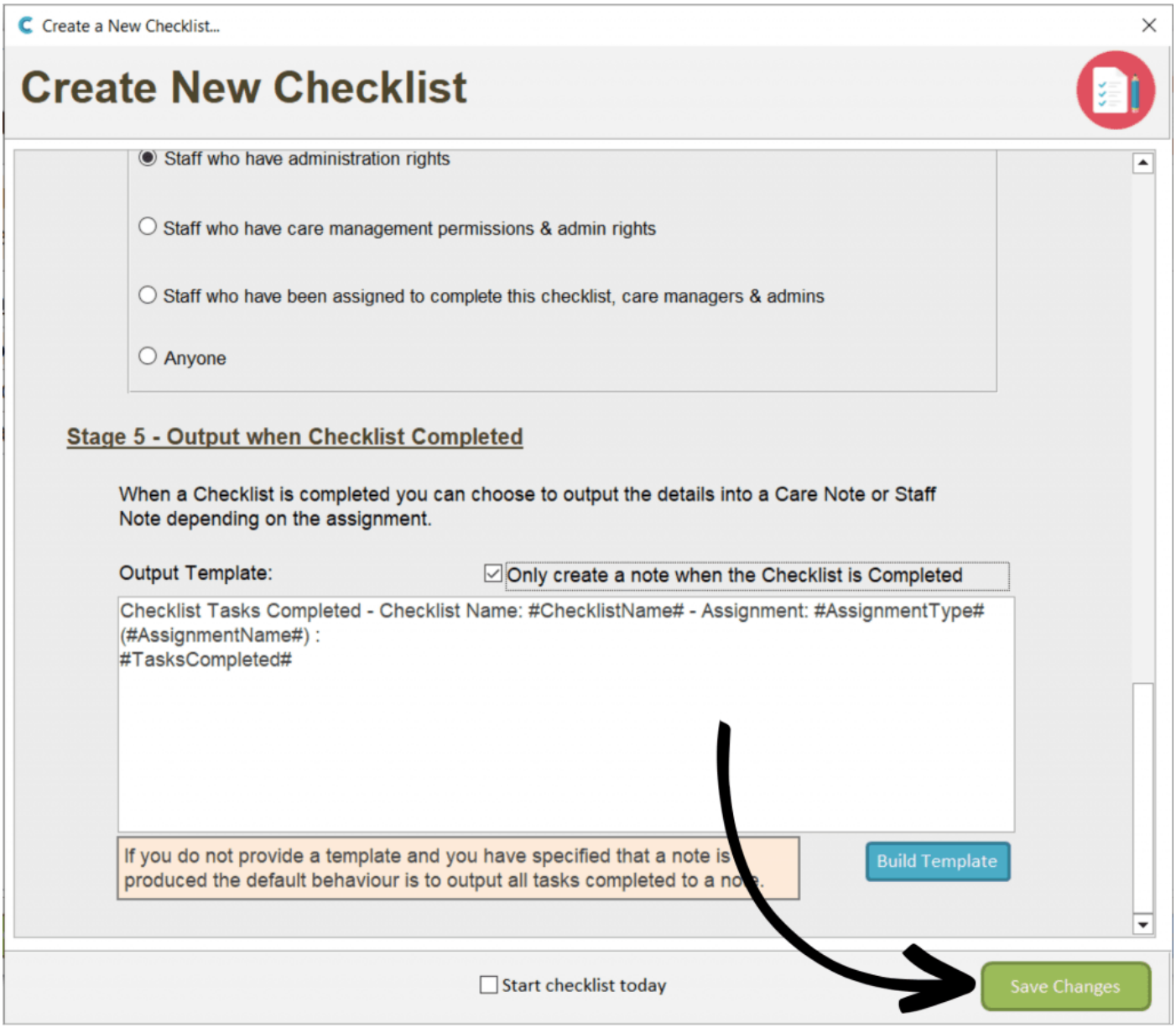
7

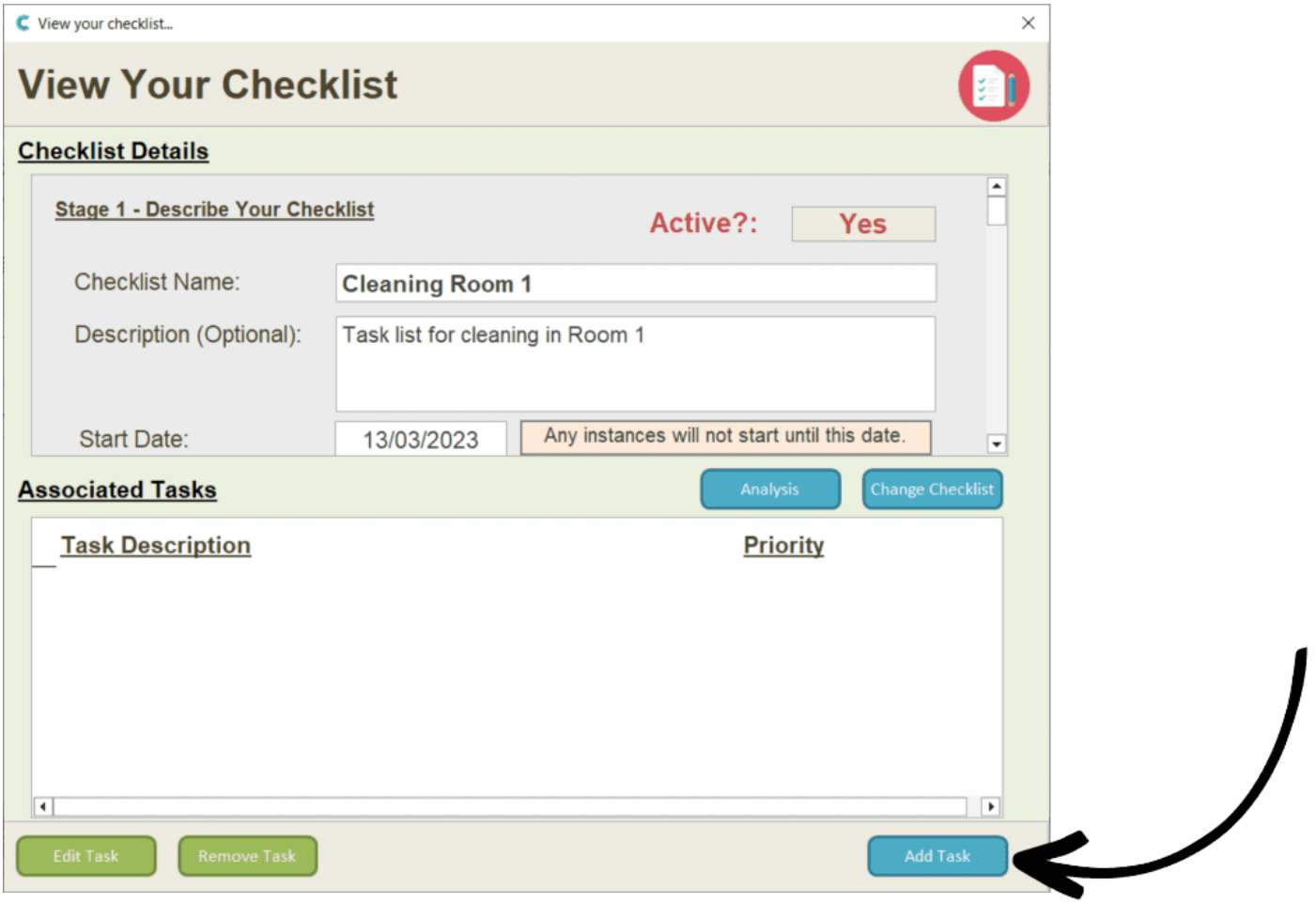
Next, you can set whether this checklist will repeat, and how often. In this example, our checklist is a weekly checklist, completed on Mondays.

The following section covers which staff members can add tasks to the list. In the example, we choose admin-only staff members.

8

Finally, we can build a note which is created after the checklist is completed. The default note will





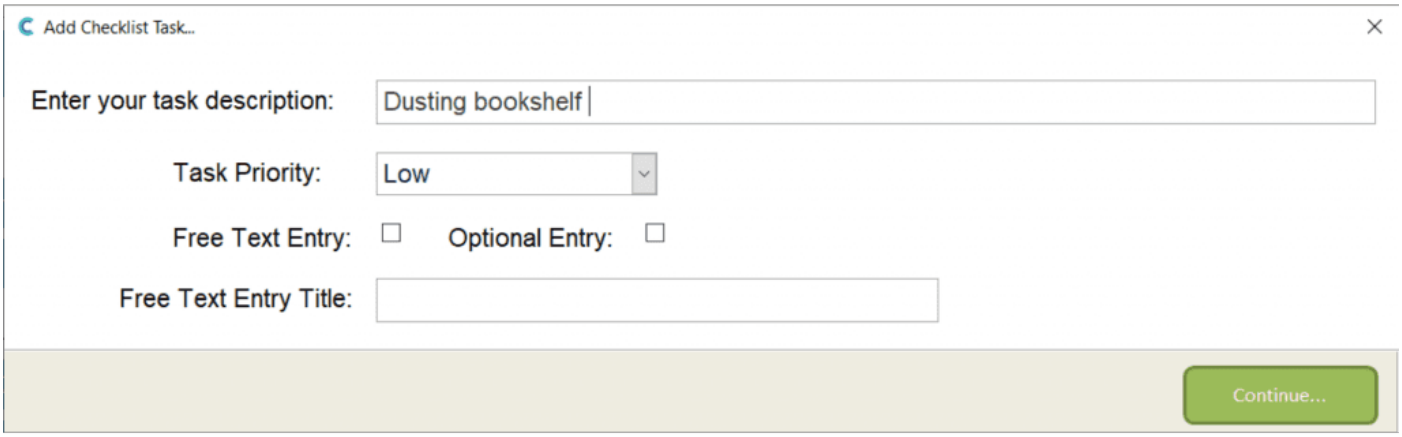
9

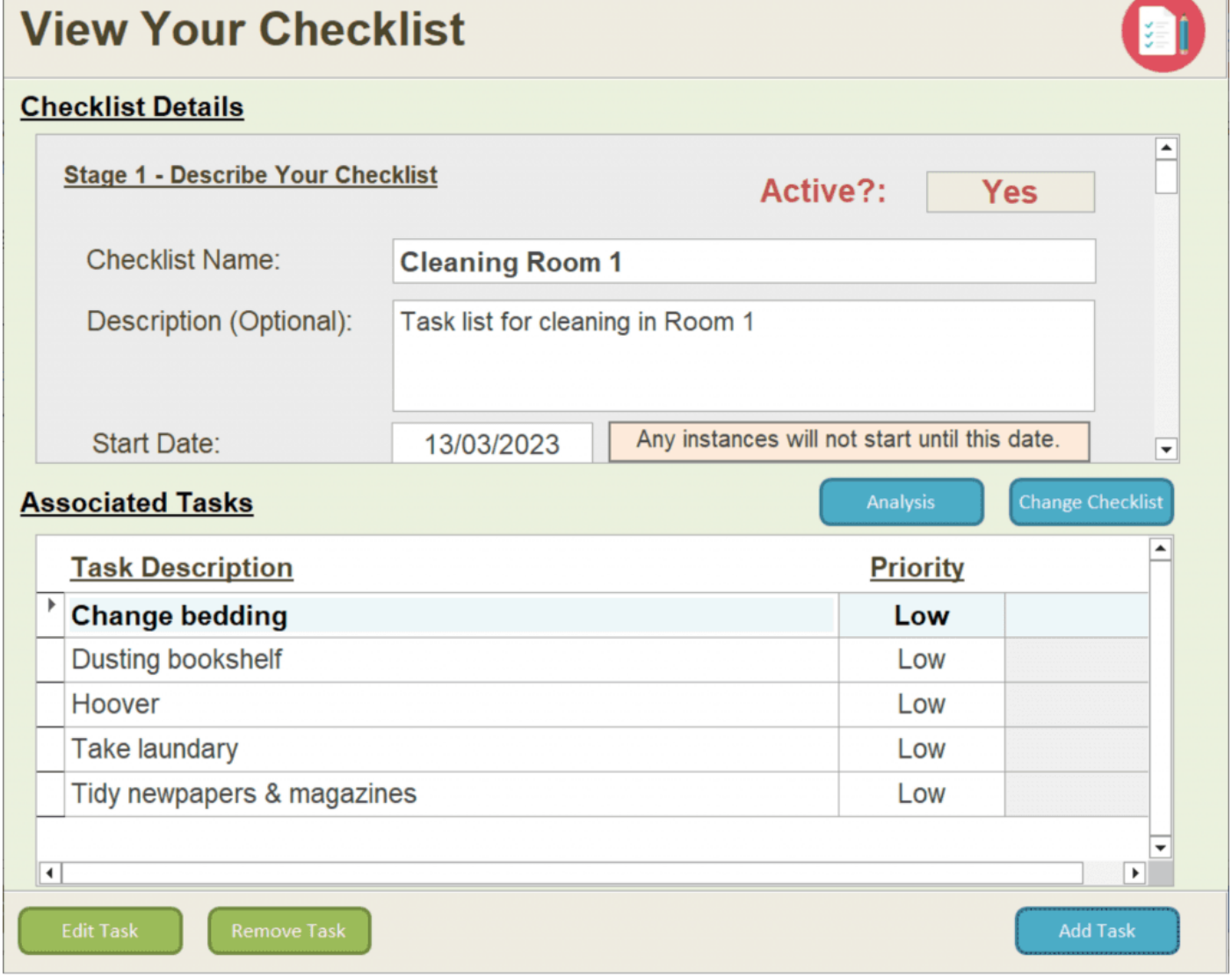
We can now begin adding tasks to our list. Simply press **Add Task** in the bottom right-hand corner of the window.

10

Enter a task description and priority. You can also choose to allow free text or optional text entry after a task is completed.

Press **Continue** to add the task to the list.





11

Repeat steps 9 and 10 until your checklist is complete!