How to set the default checklist on Cloud

Communication · https://cclearninghub.co.uk/docs/how-to-set-the-default-checklist-on-cloud/

How to set the default checklist on Cloud

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Kieran Worth

You can apply **default checklists** so that all the items you set as defaults are automatically attached to any new service users you create. This feature ensures that every service user starts with the same essential tasks, requirements, or assessments, without you needing to manually add them each time. By using default checklists, you save time, reduce the chance of forgetting important steps, and maintain a consistent standard of care across all new service users.

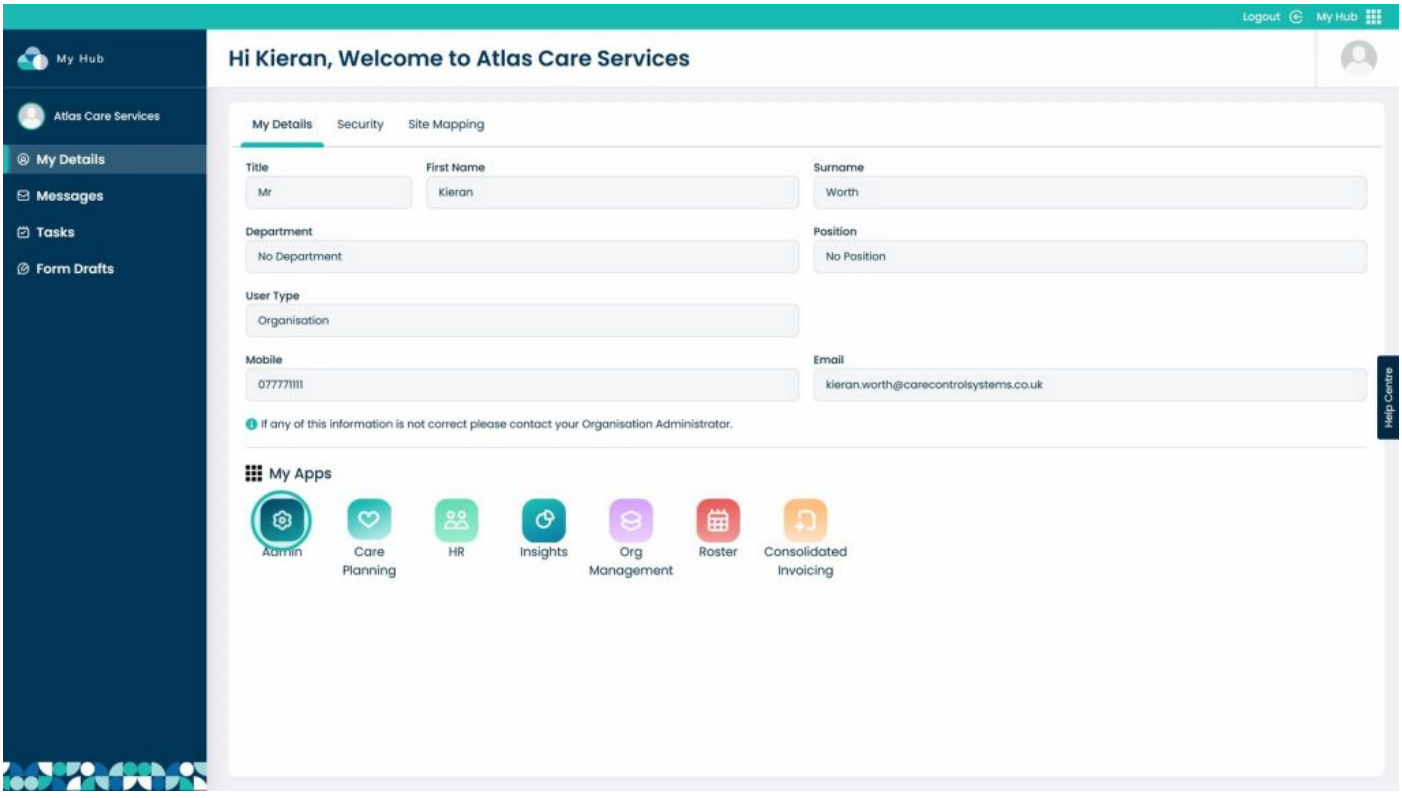
Interactive Guide

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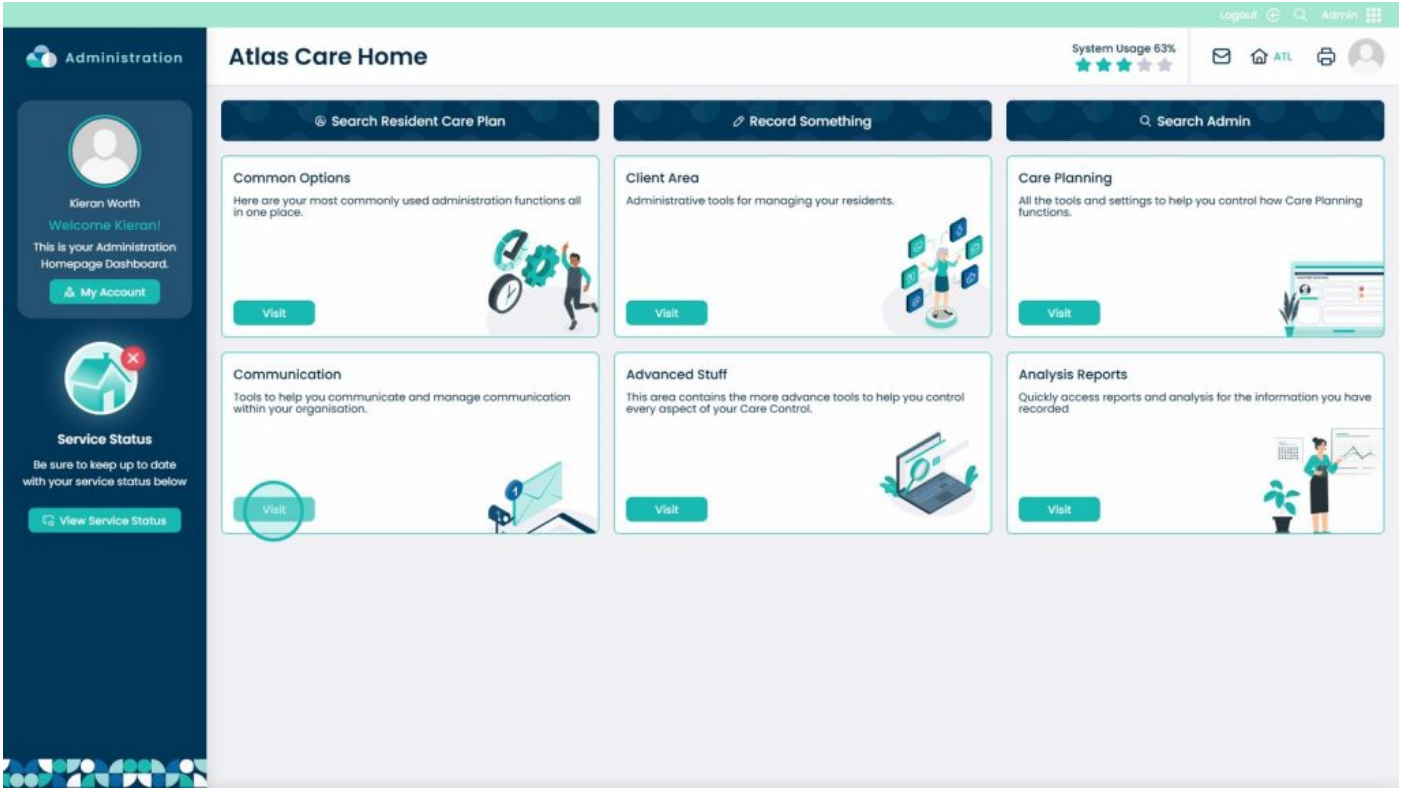
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Text based guide

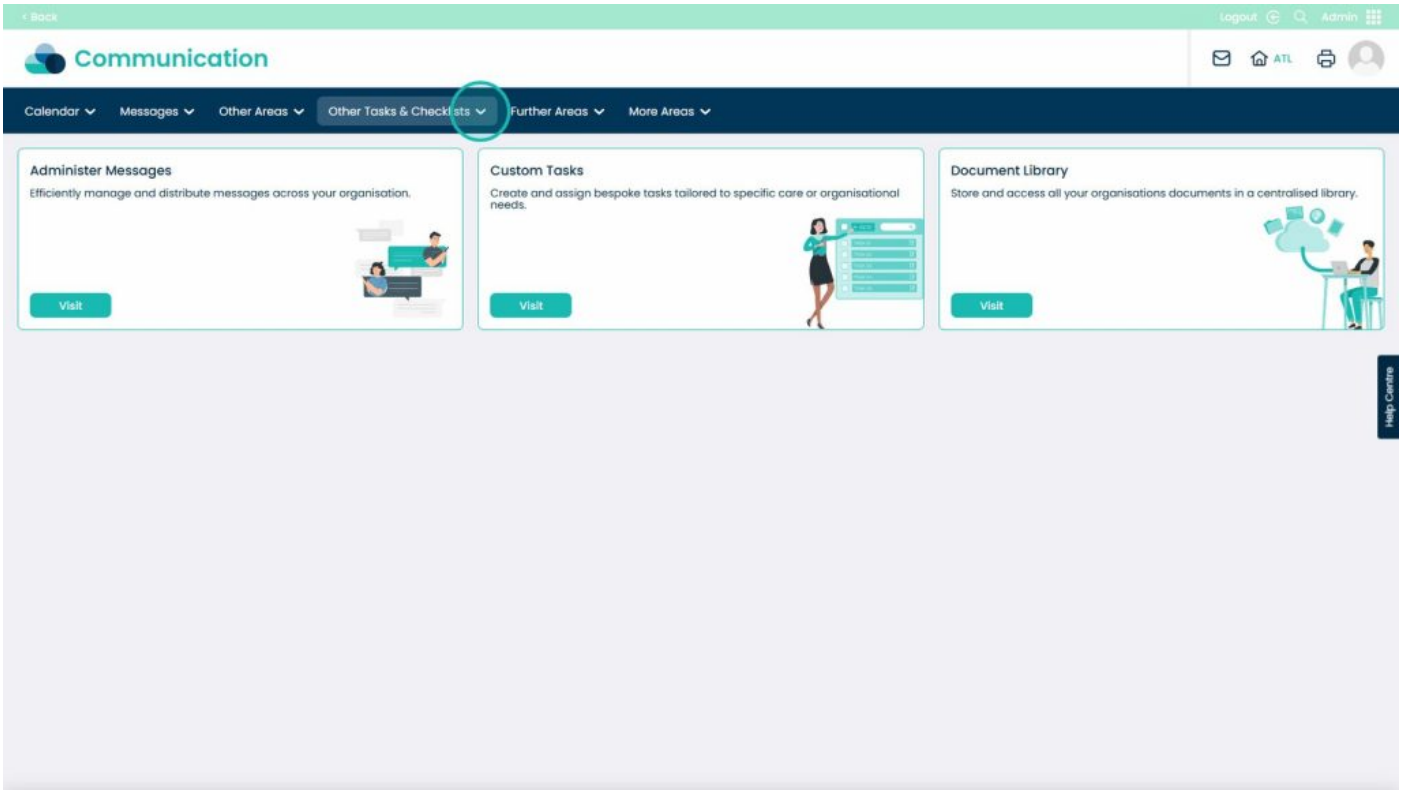
Open the Admin app



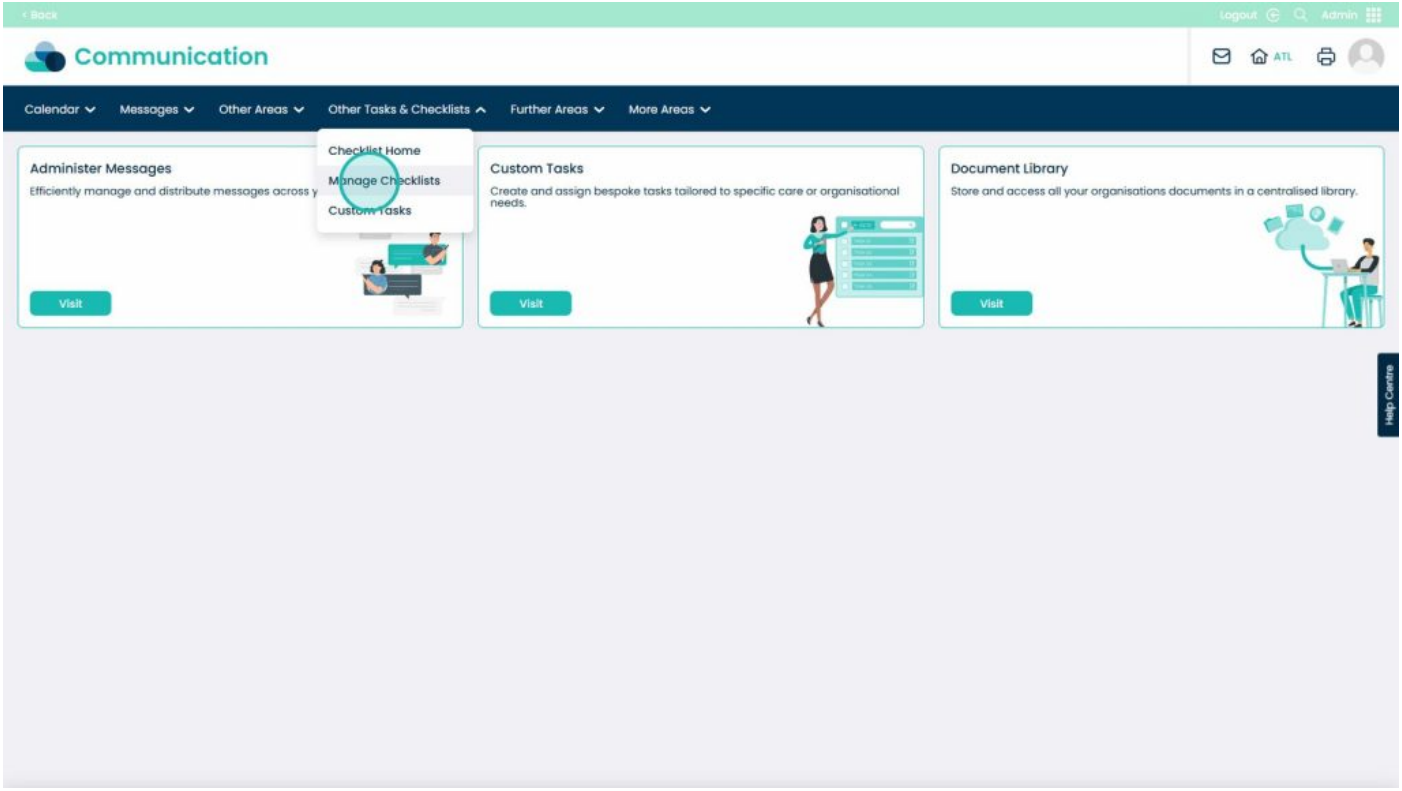
Click Visit on the Communication area



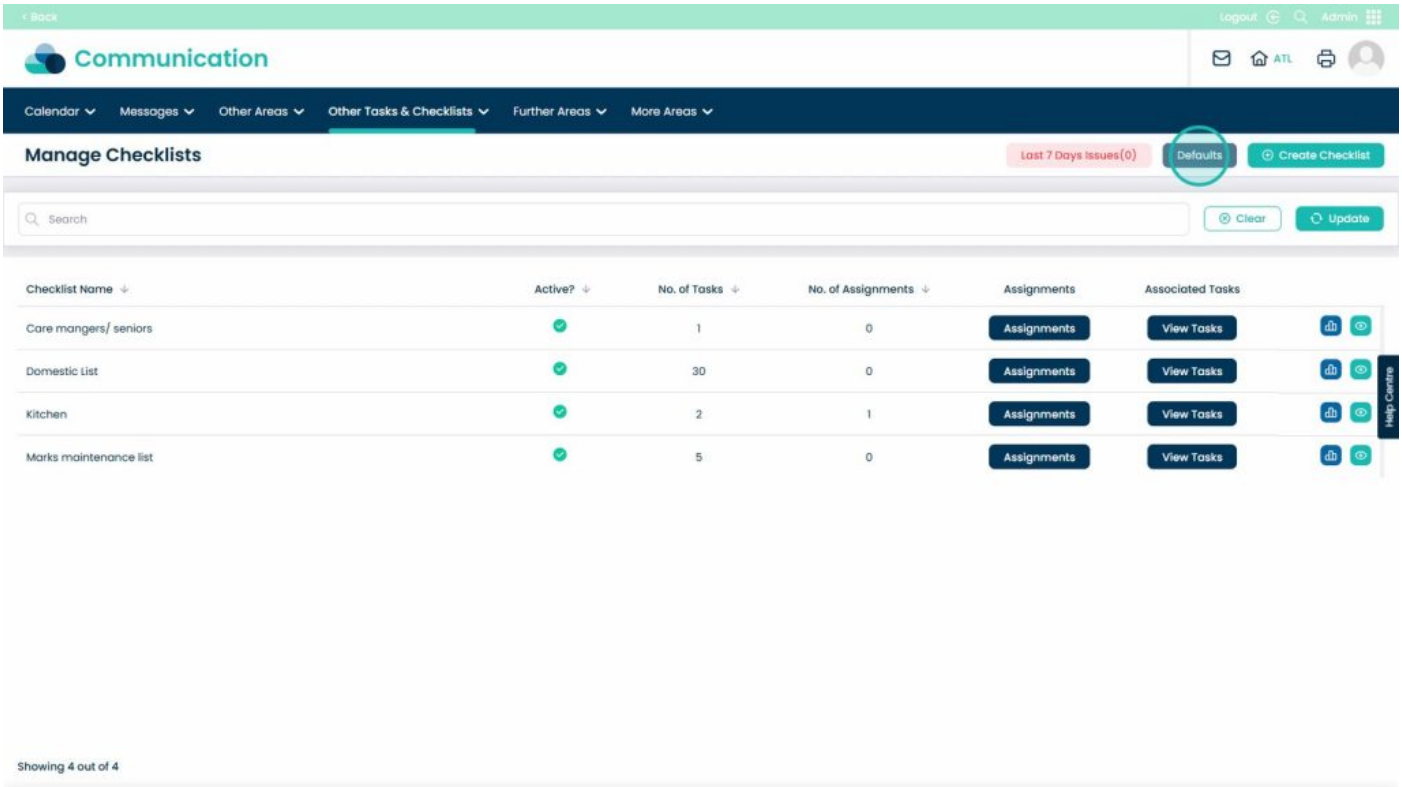
Open the Other Tasks & Checklists drop-down menu



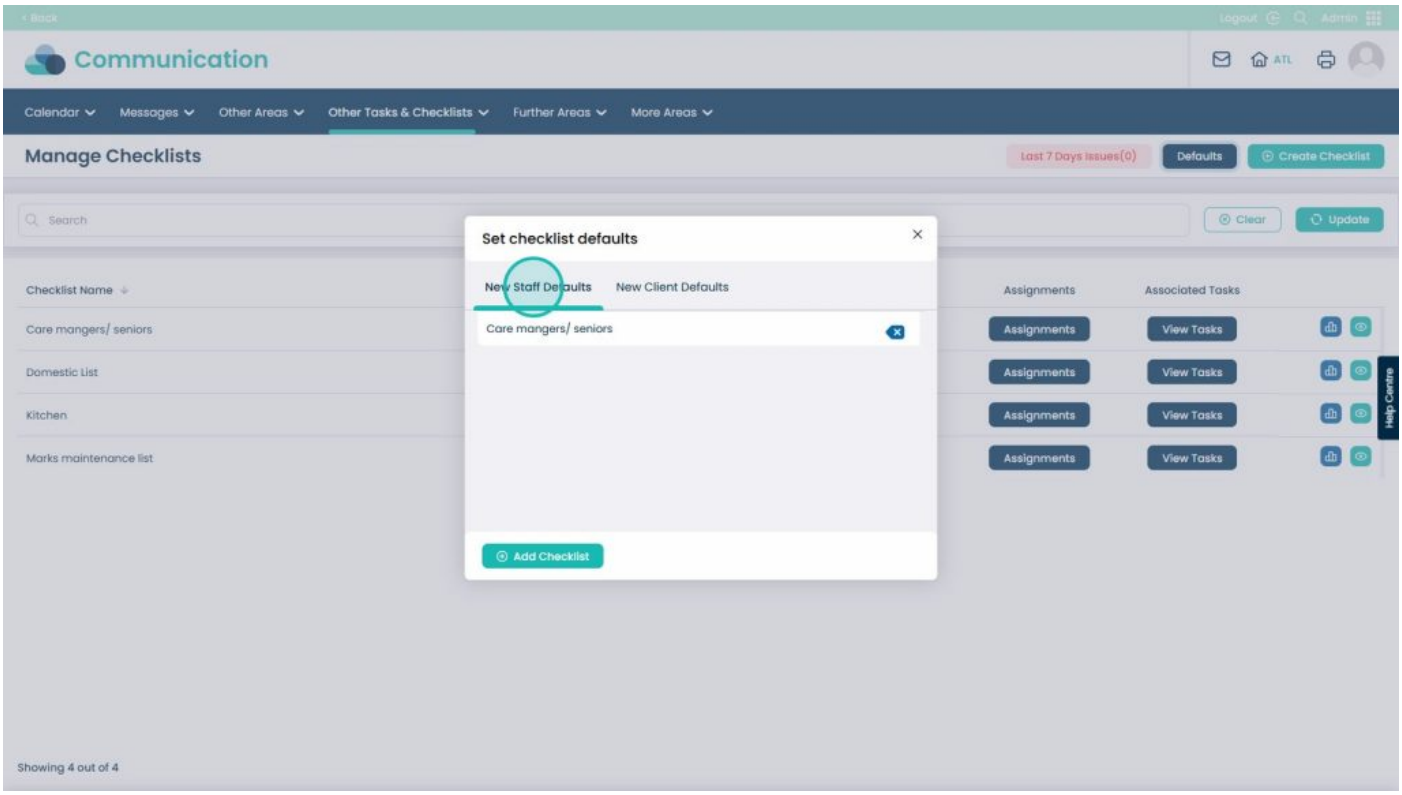
Select Manage Checklists



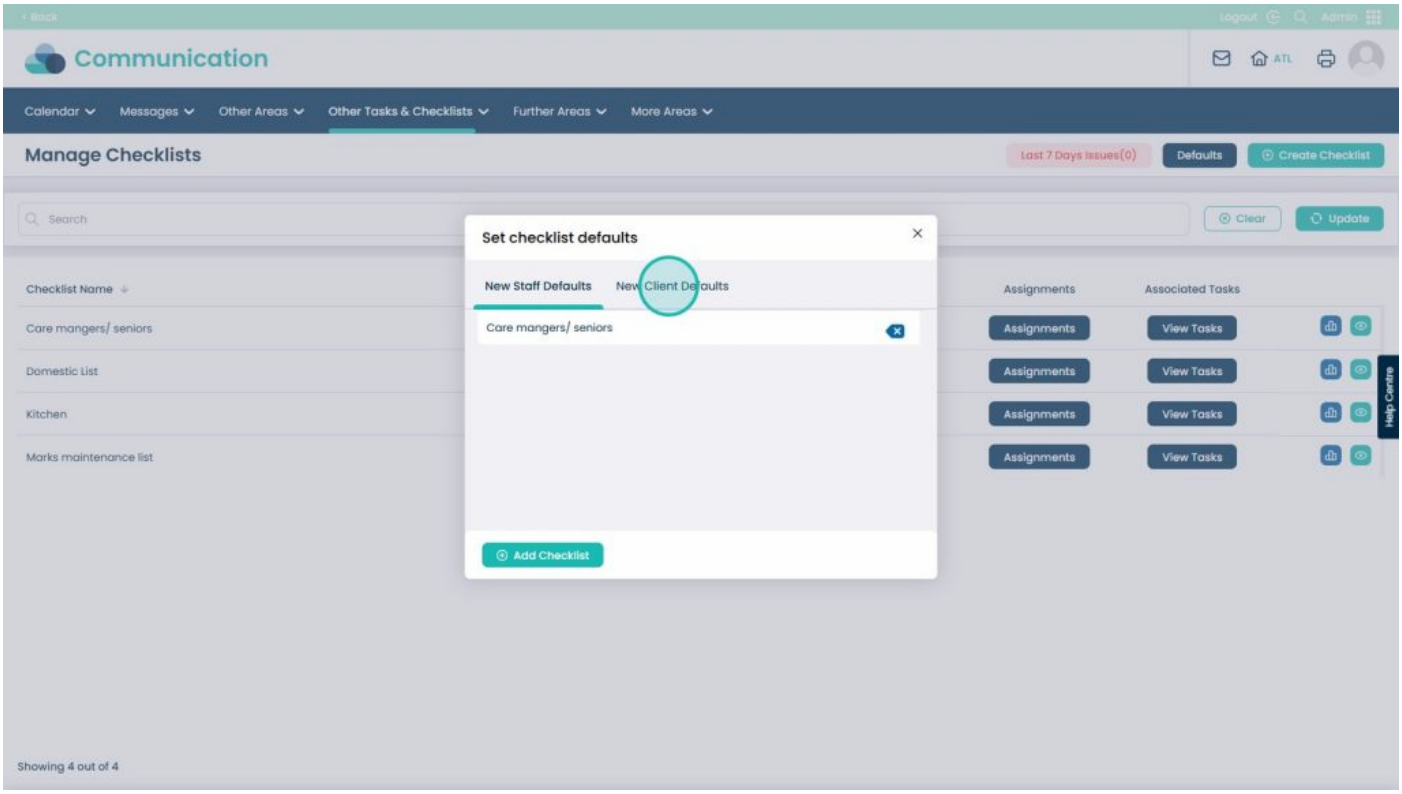
You can then click the Defaults button



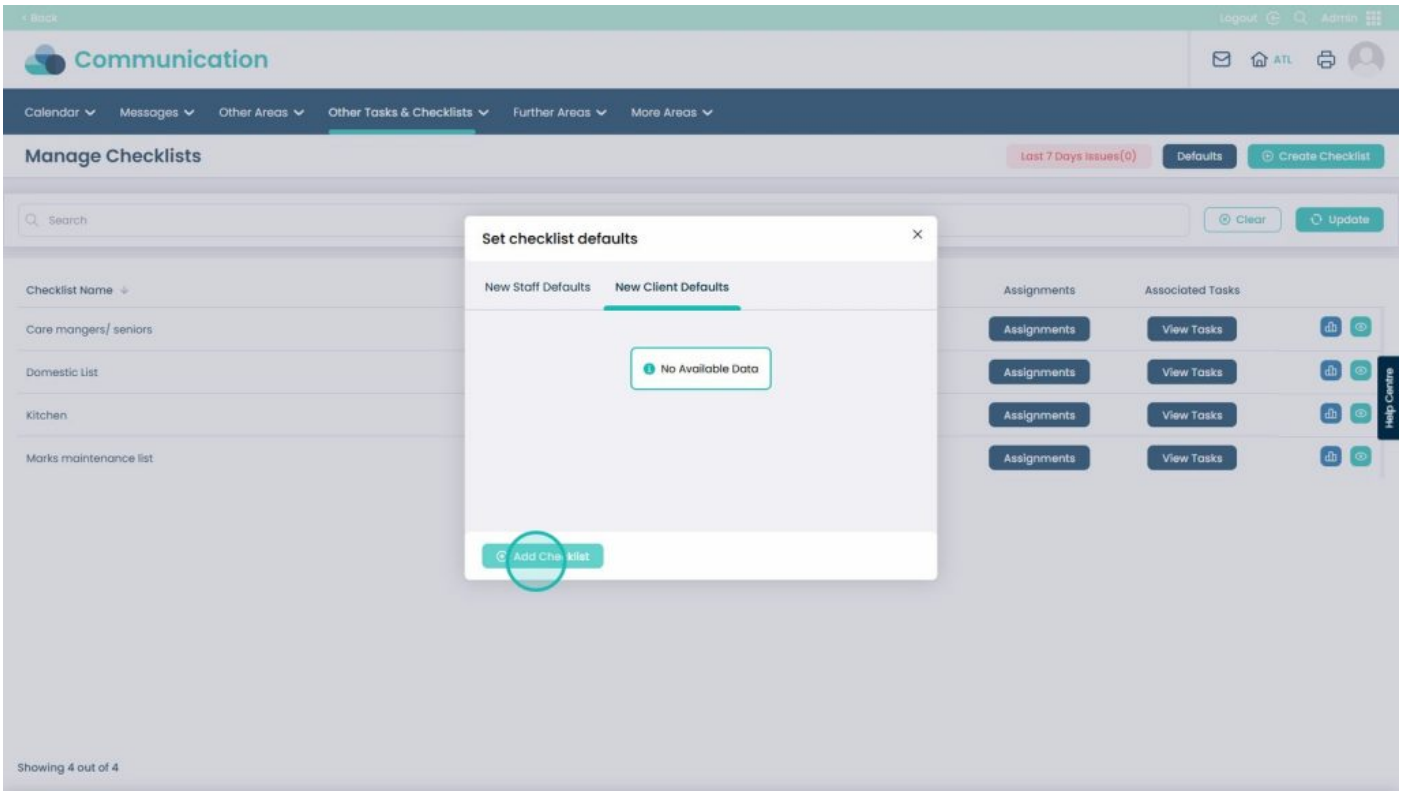
You can set the Staff Defaults by selecting this tab



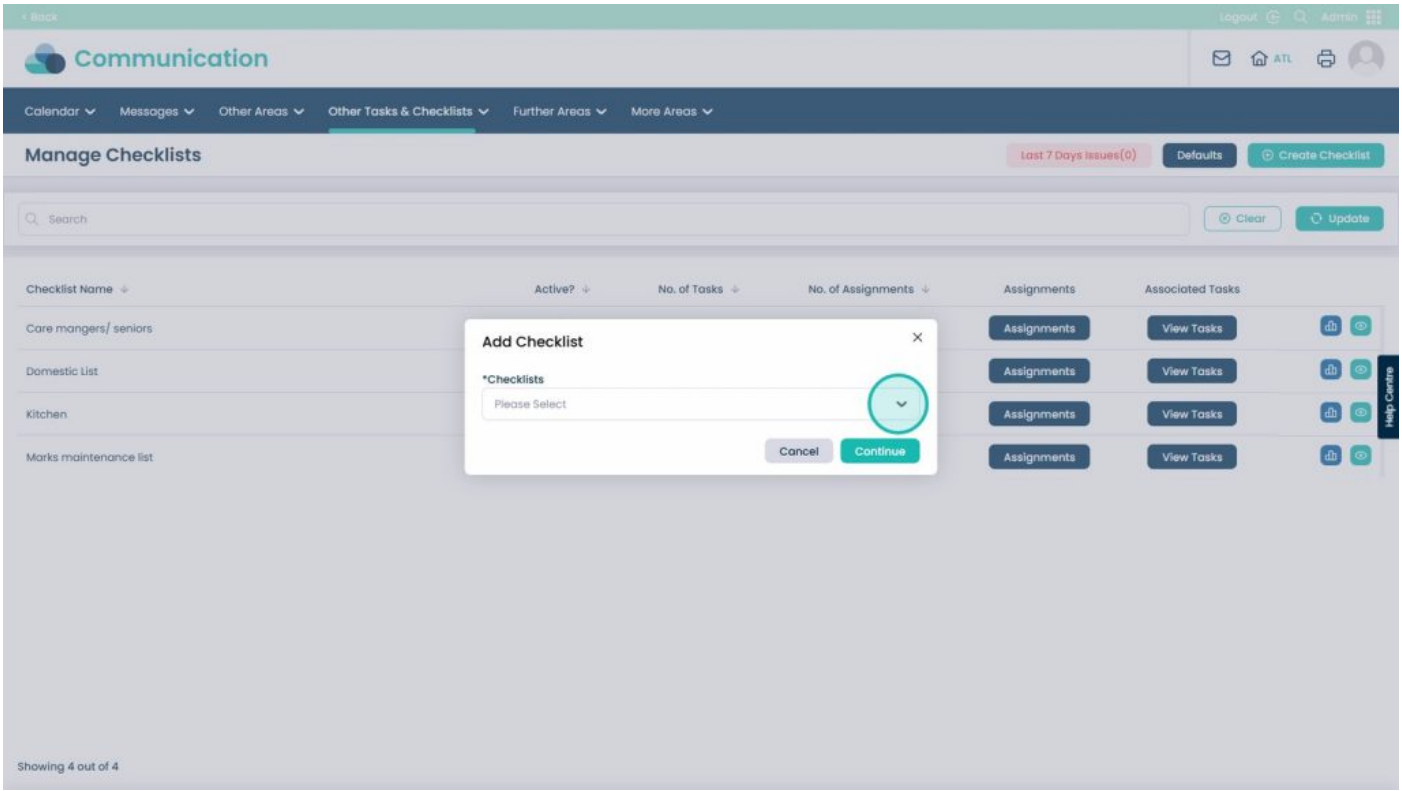
You can also choose to change the New Client Defaults by clicking this tab



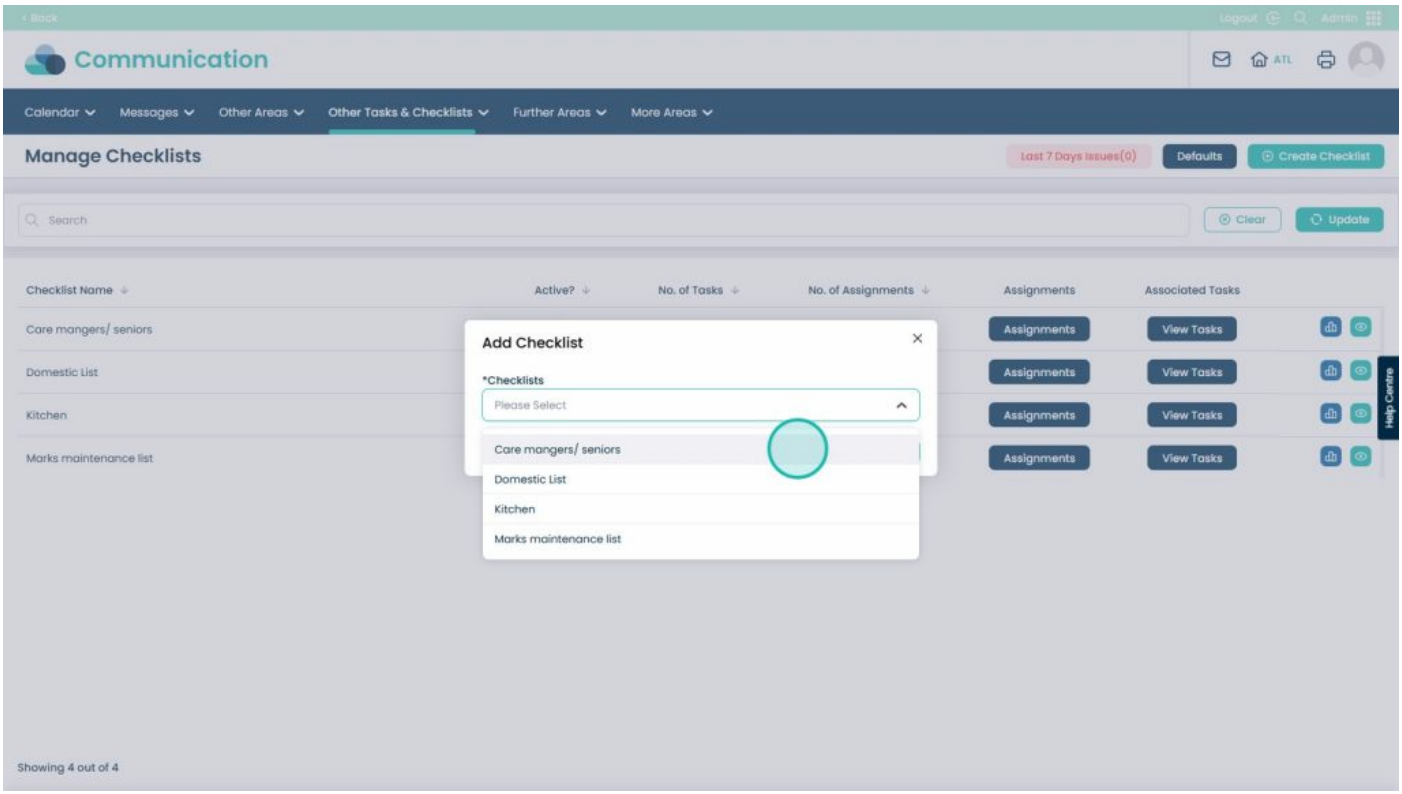
Click Add Checklist to set defaults



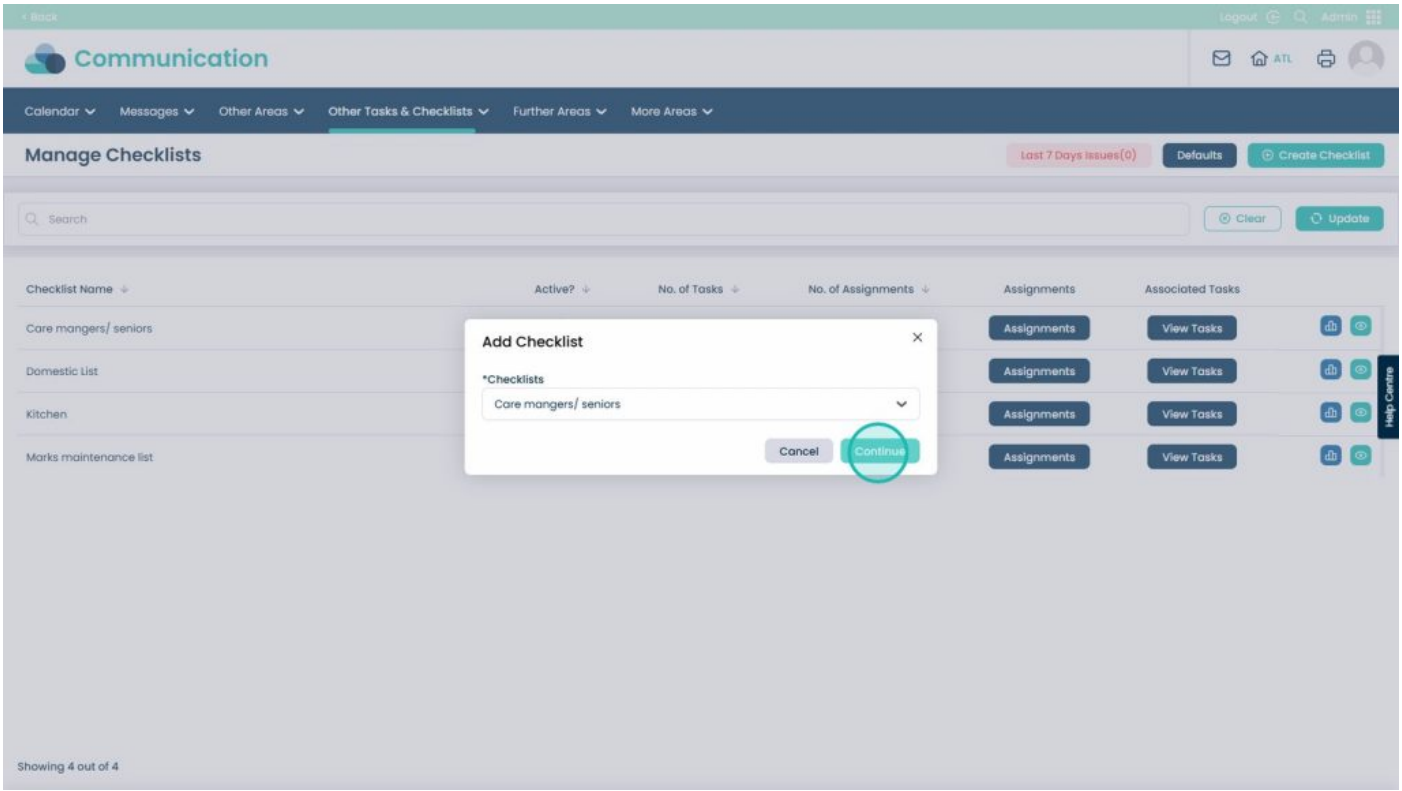
Open the drop-down to see all the current Checklists



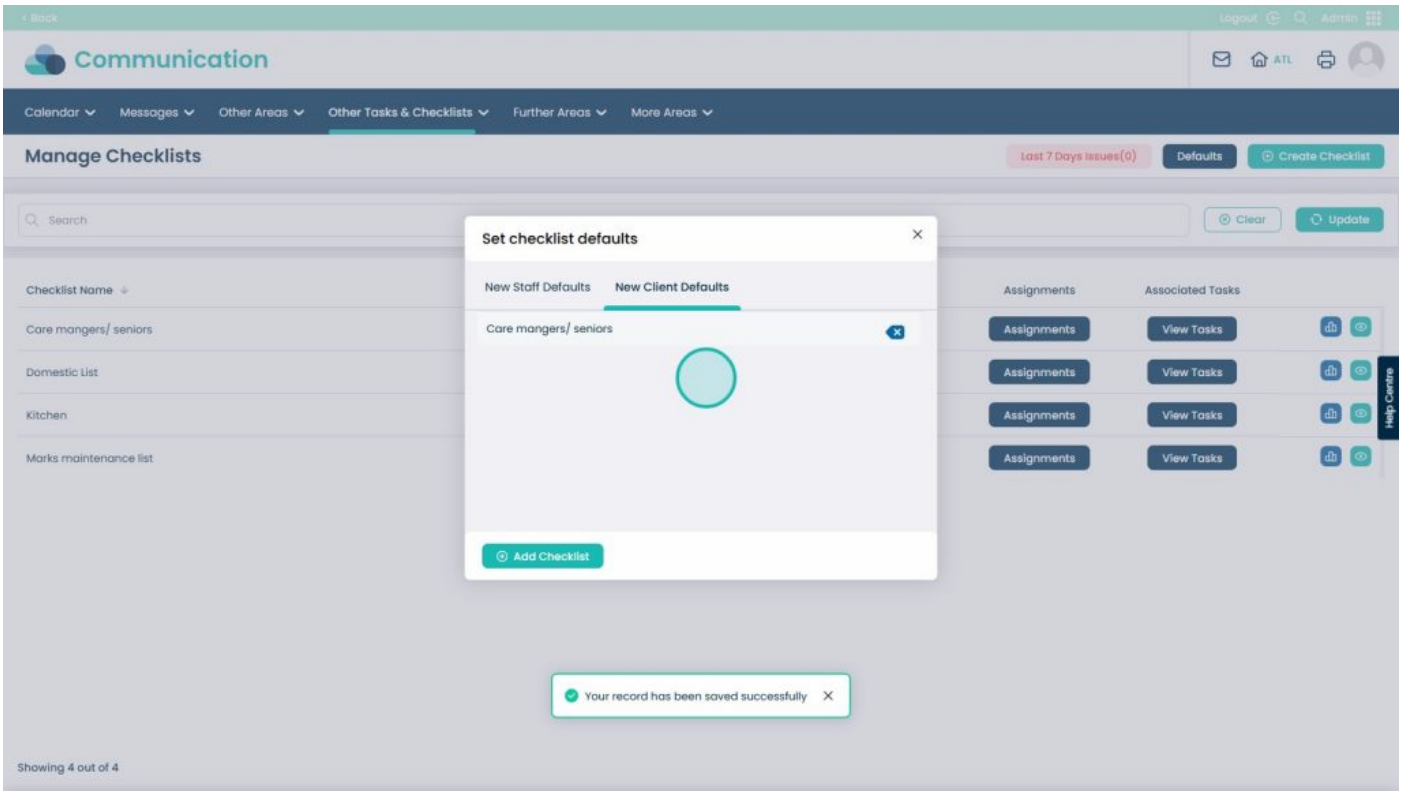
Choose the Checklist you want from the list



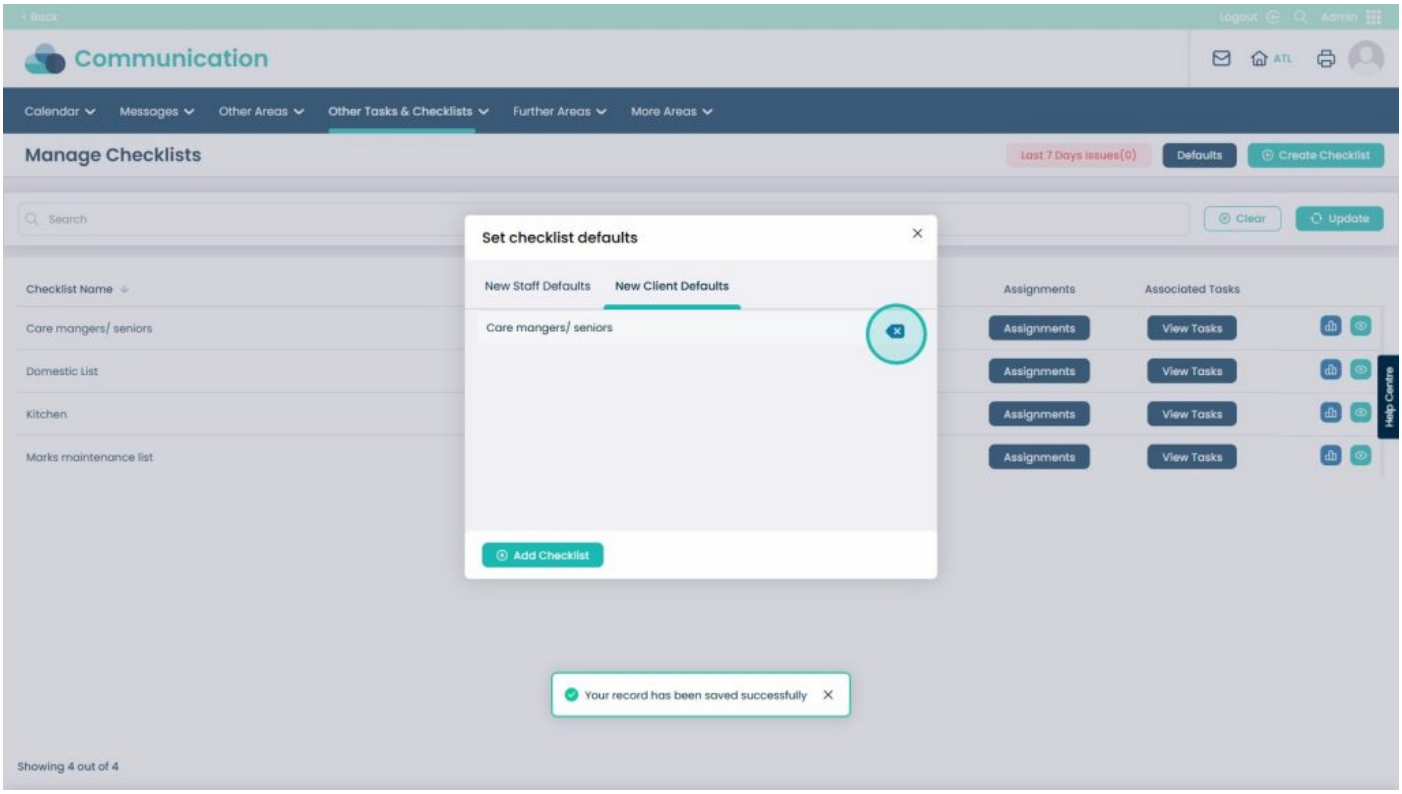
Click continue once you have chosen the correct Checklist



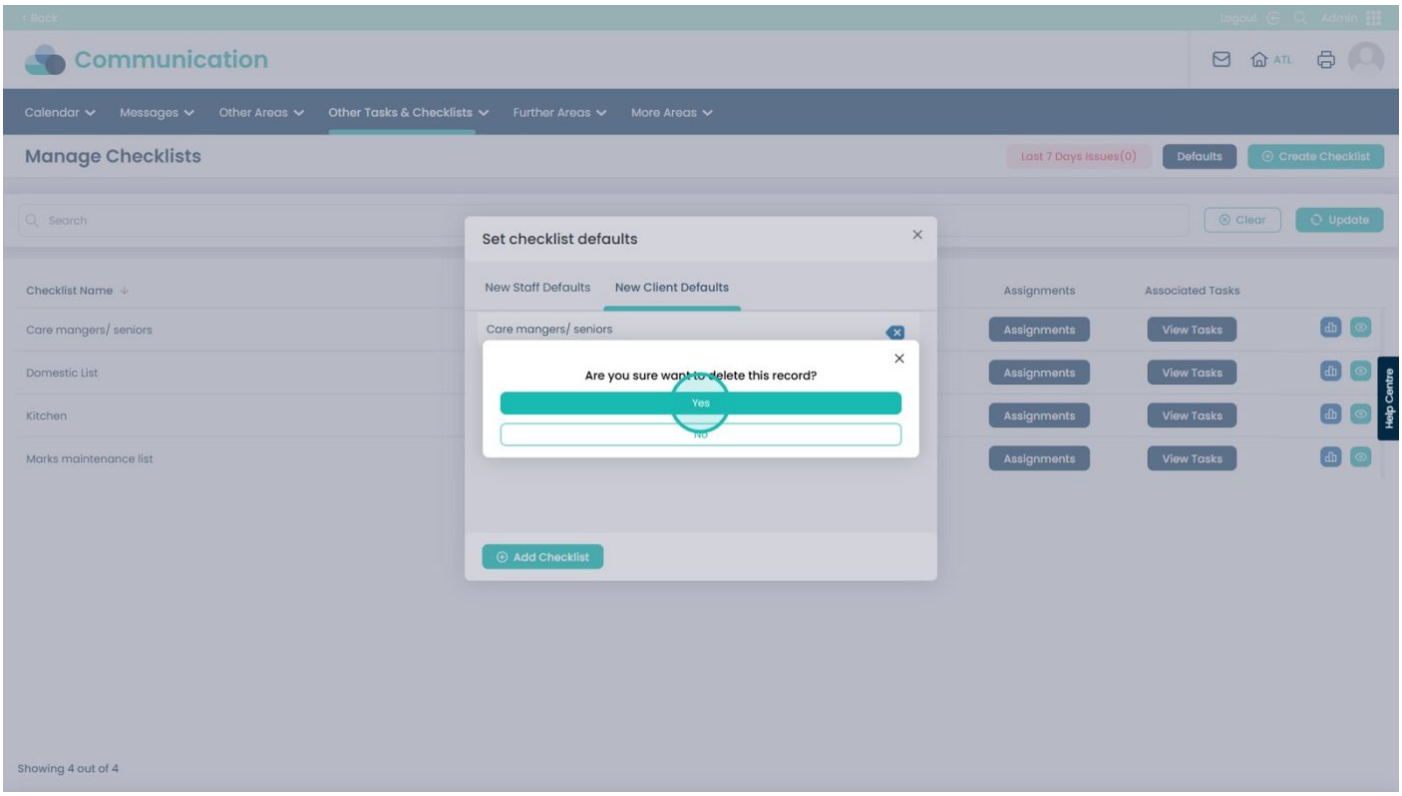
The checklist will now appear in the default checklist list



To remove a default Checklist, select the x button



Choose yes on this prompt if you are happy to remove the default checklist



Was it helpful ?

- Happy
- Normal
- Sad

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