

Checklists Overview

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The standard Checklists plugin allows your organization to automate procedures and checklists.

Checklists

Checklist: [Open](#) [Complete](#) [Hide Remarks](#) [Show Remarks](#)

Steps in a checklist can be identified as a main numbered step or a substep marked with a letter/number. You can mark the progress of tasks by [assigning the appropriate status](#), as outlined in the table below. If this functionality is not desired, steps can simply be marked as **Complete**.

Value	Meaning	Comments
(Blank)	Not Started	A step status set to (Blank) sets all of its substeps' statuses to (Blank).
O	Open	Subtasks with a status of C , O , N , or P set the primary step's status to O . If all subtasks are (Blank), the primary step is also (Blank).
C	Complete	A primary step is complete when the status for each substep is set to C , N , or P . You cannot select C or O for a step that has an open (O) or (Blank) substep.
P	Previously Accomplished	A primary step status set to P sets the status of all its substeps to P . If all substeps are set to P , the primary step's status is automatically set to P .
N	Not Applicable	A primary step status set to N sets the status for all its substeps to N . If all substeps are set to N , the primary step's status is automatically set to N .

Users can [add remarks to any step](#) and view or hide the remarks. Checklists are incident-specific: a checklist used in one incident can also be used simultaneously and independently in other incidents; however, when archived, information associated with each incident is stored with the associated incident.

Administrators can create checklists and assign a deadline for a step. When a step has not been completed and the due date passes, the status indicator field for the step or substep turns red. The due date is based on the time entered in the checklist by the administrator when an incident is created. For example, if a new incident is created by the administrator at 11:30, then a task due in 30 minutes shows as overdue at 12:01.

To access Checklists

1. In the *Tools* section of the control panel menu, click **Checklists**.
Note: If you are logged in to a specific incident, the checklists applicable to that incident appear on the page. If you are logged in to a Master view, an **Incident** drop-down list shows in the window. The incident you select from that drop-down list determines the incident with which the checklist data will be archived. Archiving is only available in previous releases.
2. On the *Checklists* page, click the **Incident** drop-down list and select the incident you want.
3. Click the **Checklist** drop-down list and select the applicable checklist.

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