

Change an Action Item's Status

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You can change an action item's status. This helps you track not only the item, but also the completeness of the parent issue.

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You can access action items from either the **Issue View** or the **Action View**. Once you have the issue open, you can change the status. Status changes are recorded and available from the issue's history.

Note: Improvement issues and their action items can be accessed from the Home page, as described in this procedure, or from the Incident Dashboard (select the **Improvement Plan** tab).

To change the action status from the Issue View

1. On the *Home* page, point to **Recovery** and click **Improvement Plan**. The *Improvement Plan* page opens.
2. On the left, click **Issue View**.
3. In the field after **Issue View**, select **Open**.
4. If appropriate, select the facility.
5. Locate the improvement issue, and then click **Edit**. The *Edit Improvement Issue* window opens.
6. Locate the action, and select the appropriate status option: **Open**, **Pending**, **Closed**, **Completed**, **In Progress**, **Under Review**, or **Follow Up Required**.
7. Click **Save**.

To change the action status from the Action View

1. On the *Home* page, point to **Recovery** and click **Improvement Plan**. The *Improvement Plan* page opens.
2. Open the **Action View**.
3. In the field after **Action View**, select the appropriate status.
4. If appropriate, select the facility.
5. Locate the action item, and then click **Edit**. The *Edit Improvement Issue* window opens.
6. Locate the action, and select the appropriate status option: **Open**, **Pending**, **Closed**, **Completed**, **In Progress**, **Under Review**, or **Follow Up Required**.
7. Click **Save**.