

Action List

23/10/2024 10:17 am BST

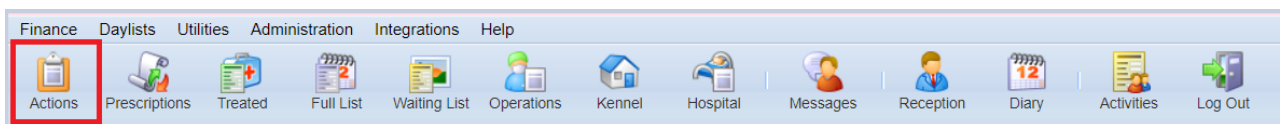
Summary

The Actions List allows you to view actions/tasks between dates specified and set them as completed. Its purpose is that of an electronic to do list or message board for the site.

To utilise the Actions daylight, an 'Actions' diary column needs to be created.

Details

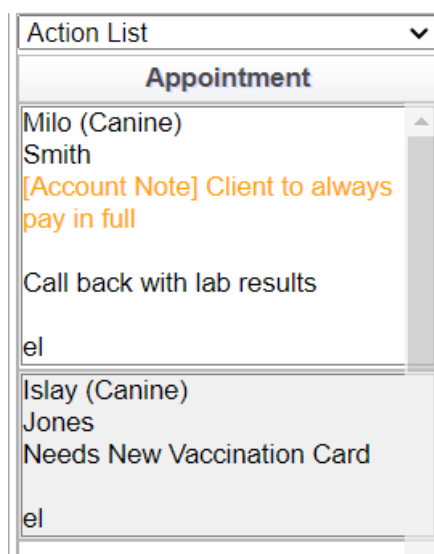
The Actions List can be accessed using the 'Actions' button on the main toolbar or from the 'Daylists' menu.



Creating an Action

1. Navigate to the **Diary Screen** and locate the '**Actions**' column.
2. **Double click into an empty slot** (using the same method as [making an appointment](#)).
3. Specify a '**reason**' for the action and **save** the 'appointment'.
4. The action will display in the Diary screen and on the 'Actions' Daylist.

Diary:



These appointments will then display on the Actions Daylist.

Memo

Delete

Make Appt

Refresh

From

23/08/2024

To

23/08/2024

Surgeon

All

Site

Esher

☐ Show Completed

Action List

		Start Date	Start Time	Client	Patient	Breed	Surgeon	Reason	Site	Location	
1		23/08/2024	00:00	Jones	Islay	Labrador Retriever	Action List	Needs New Vaccination Card	Esher	The Avenue BS...	
2		23/08/2024	00:00	Smith	Milo	Cocker Poodle	Action List	Call back with lab results	Esher	3 Victoria Road ...	

The patient will remain on the list, until the action has been set as 'Completed'.

There is a status filter on the Action List. By default, this shows only "Not Completed", though it can be altered to show actions which have already been processed.

Priority colours can also be specified on the Action List.

Note: *these colours do not display on the Diary view.*

Action List										
		Start Date	Start Time	Client	Patient	Breed	Surgeon			
1		18/06/2024	00:00	Davies	Milo	Bedlington Terrier	Action List			
2		18/06/2024	00:00	Eaton	Jasper					
3		18/06/2024	00:00	Woodhall	Milo					

Set Priority
Set In Progress
Set Completed
Appointment Memo
Edit Appointment
Delete Appointment
Send To Smart Flow
Arrive and Send To Smart Flow
Clipper
Show Referrals
View History
View PACS

Using the Actions List

When selecting a patient from the Actions list, right-clicking provides you with a few options:

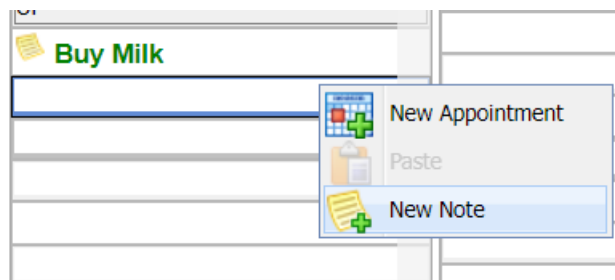
Function	Description / Function
Set Priority	Priority levels 1-10. If set, this block of colour will show in the first column in the Action List.
Set In Progress	Turns the appointment text red in the Action List and Diary
Set Completed	Sets the Action as completed. This appointment will then show when ticking ‘Show Completed’.
Appointment Memo	If a memo is added, the user can right click on the appointment, or select ‘Memo’ from the top of the screen to add/view it.
Edit Appointment	Allows the user to edit the Appointment Reason and Note.
Delete Appointment	Allows the user to remove the appointment. This will remove from the Action List and Diary screen.

Clipper	Add the patient and client details to the Clipper .
Show Referrals	Shows the patient's registered referral details.
View History	Displays the Patient's Treatment history in a pop-up window.
View PACS	If the practice makes use of a cloud-based PACS system, selecting this option will show any uploaded images in a new tab.

New Note

Basic notes can also be added into the actions diary column without transferring into the diary daylist.

Right click an empty slot and select 'new note'. This will prompt the user to enter free text and will display as a basic note that can be deleted and edited from the diary column itself.



The Actions List can be printed, emailed and exported as a CSV file:

