

Action List

14/07/2025 11:52 am BST

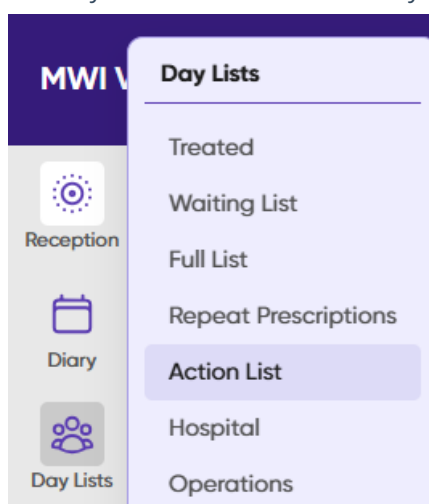
Summary

The Action 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 Action List can be accessed via the 'Day Lists' button from Primary Navigation on the left-hand side.



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:

Action List

Appointment

Winnie (Canine, Greyhound)

Laursen

Call with lab results

ol

Ben (Feline, DSH)

Darby

Phone call

Discuss diet

lo

These appointments will then display on the Action Day List.

| Action List | | | | | | | | | | |
|--|------------|------------|---------|---------|-----------|-------------|-----------------------|-------|---------------------|------------------|
| <div> <div>Memo</div> <div>Delete</div> <div></div> <div>Make Appt.</div> <div>Refresh</div> </div> | | | | | | | | | | |
| <div> <div>From</div> <div>14/07/2025</div> <div>To</div> <div>14/07/2025</div> <div>Surgeon</div> <div>All</div> <div>Site</div> <div>Esher SA</div> <div>Show Completed</div> </div> | | | | | | | | | | |
| | Start Date | Start Time | Client | Patient | Breed | Surgeon | Reason | Site | Location | Appointment Note |
| 1 | 14/07/2025 | 00:00 | Darby | Ben | DSH | Action List | Phone call | Esher | 11 Ellesdon Surr... | Discuss diet |
| 2 | 14/07/2025 | 00:00 | Laursen | Winnie | Greyhound | Action List | Call with lab results | Esher | Littlegate Surre... | |

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 | | | | | | | | | | |
|--|------------|------------|---------|---------|-----------|-------------|-----------------------|-------|---------------|--|
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Set Priority

Set In Progress

Set Completed

Appointment Memo

Edit Appointment

Delete Appointment

Send To VetCheck

Arrive and Send To VetCheck

Clipper

Show Referrals

View History

View PACS

Using the Actions List

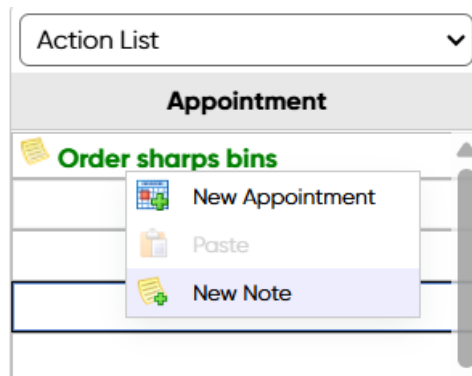
When selecting a patient from the Actions list, right-clicking provides you with a few options:

| 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. |
| Send To VetCheck | Send the patient to VetCheck if the integration is in use. |
| Arrive and Send To VetCheck | Arrive the patient and send to VetCheck if the integration is in use. |
| 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 daylight.

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

