Action List

14/07/2025 11:52 am BST

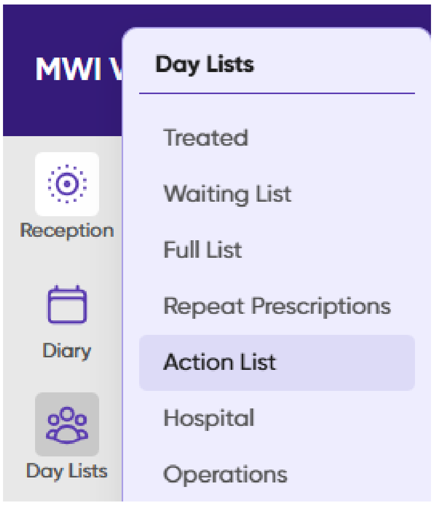
Summary

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 daylist, an 'Actions' diary column needs to be created.

Details

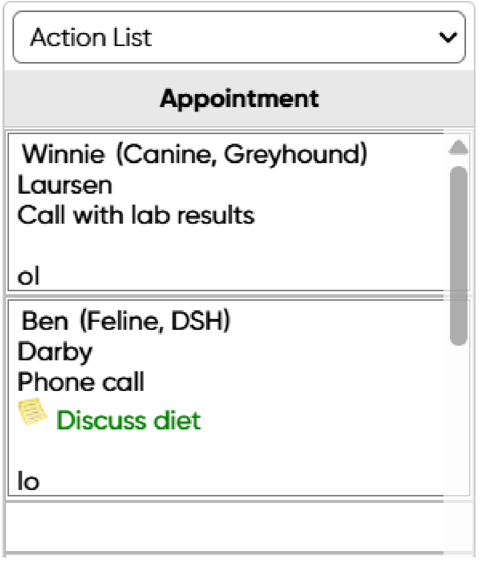
The Action List can be accessed via the 'Day Lists' button from Primary Navigation on the left-hand side.



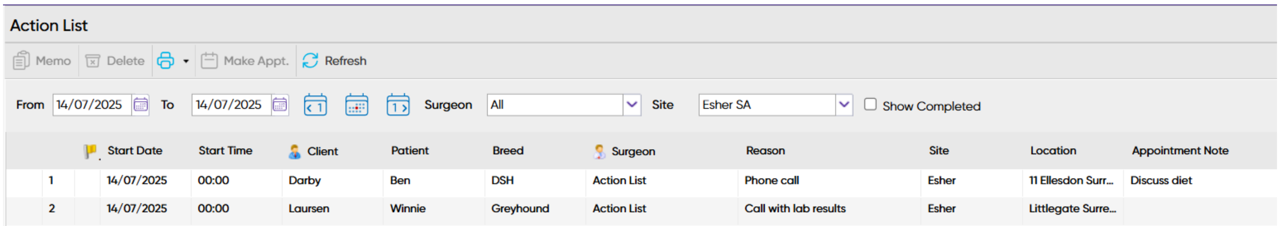
Creating an Action

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:



These appointments will then display on the Action Day List.

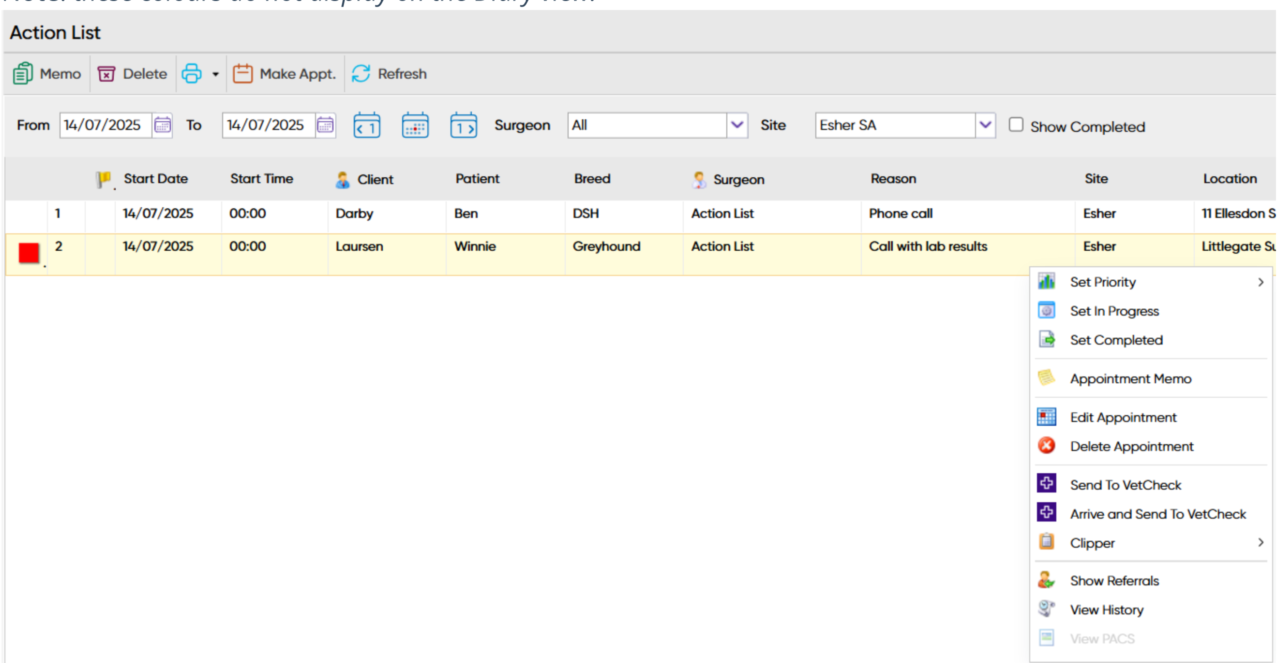


The patient will remain on the list, until the action has been set as 'Completed'.

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.*



Using the Actions List

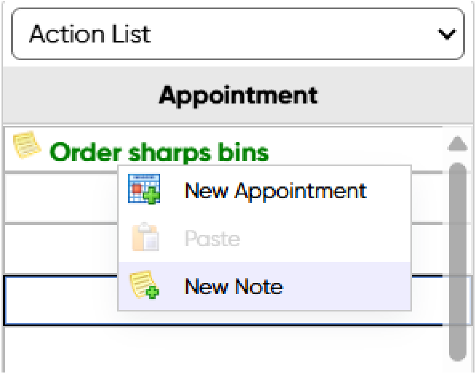
When selecting a patient from the Actions list, right-clicking provides you with a few options:

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