Role Permissions

Action Items Workflow

Status	Status Guidelines	Person Responsible	Tabs
DRAFT	**Action item required information can be entered with attachments.** • Title, Description, and Location are required to save • Title, Description, Location, Priority, Due Date, Date Assigned, Assigned To, and Action Owner required to progress to the next status.		Action Information, Attachments, Progress Notes
ASSIGNED	**Progress notes and their attachments can be added during this status.** • Completed By and Date Completed are required to complete the action item.	Assigned To/ Action Owner	Action Information, Attachments, Progress Notes
CLOSED	**Action item is Closed but viewable, and Assigned By can reopen it.** • Action item is hidden from the Action Item's window unless Status filter includes Completed.	N/A	Action Information, Attachments, Progress Notes
DELETED	**Action item was removed from the platform and is not viewable.**	N/A	N/A
REOPEN	**Closed action items that are reopened will return to the Assigned status.**	N/A	Action Information, Attachments, Progress Notes

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