ACTION ITEM LIST

Use this tool at your UBT meetings to track action items. Capturing the team's work and posting it on a wall creates visual focus and allows for agreement on details before closing the meeting.

Action Item List

#	TASK	OWNER(S)	DATE ASSIGNED	DUE DATE	STATUS	DATE CLOSED
1	Collect patient surveys	John Smith	1-13-13	2-13-13	--	2-12-13
2						
3						
4						
5						
6						

Explanation of terms

#: Number assigned to the action

TASK: Specific description of the task to be completed.

OWNER: Person responsible for making sure the action is completed by its due date; may be the person who does the work, but if not, oversees the work being done.

DATE ASSIGNED: By noting when an action was assigned, teams can see clearly how long it takes to complete.

DUE DATE: Date by which the item should be completed. *Note:* If the target date isn't met, leave the original date, then add a new entry in the "Due Date" column of the form "Rescheduled–[new date]." Use the status column to note why the due date was changed.

STATUS/NOTES: Place to put notes, if needed, to reflect any interim progress, issues, why the due date was rescheduled, etc. This column can be a good communication tool for action items in progress.

DATE CLOSED: Date the action item was completed.