



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	closed	2-13-13
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 “Rescheduled [new date]” in the Due Date column. 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.