

# CHECKLISTS

ioLiving SmartKitchen

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## HACCP CHECKS

The company's HACCP plan includes organoleptic checks and tasks performed as directed on a daily, weekly, or monthly basis. The HACCP archive must contain entries on the checks and their result, as well as information on corrective actions if deviations were found. The checklists feature replaces the paper forms previously used to record checks.

The account administrator creates checklist templates for the service, which are used to record observations and possible deviations. Checklists include entries for selected HACCP tasks, such as: cleaning the dishwasher, approval inspection of raw materials, the result of a hygiene test, etc.

In an organization with several locations, the account administrator creates organization-wide checklists that are automatically copied and updated to all units in the organization. Checklists are scheduled to be completed daily, weekly, or monthly. The checklist is, in a way, a form template stored in ioLiving service. The checklist acknowledges the task performed, its execution time, the person who performed the action and the result of the check. This information is reviewed later in the service.

### Conditions for the use of checklists

1. The account administrator has a valid ioLiving HACCP license.
2. The account administrator has created a personnel list on the service:
  - ➔ Account
  - ➔ Unit information
  - ➔ Personnel list

When filling in the checklist, the person who performed the check is selected from the personnel list.

### CREATING A CHECKLIST

1. The administrator logs in to the account with own username. When the HACCP license is activated **"Checklists"** tab is displayed on the main page. On this tab you will find **"Create new checklist"**.
2. Start by giving a nickname to the list after which data fields are added. Press "Add New Field" to get new data fields. This is continued until the desired data fields have been created.
3. Select "Save measurements" if numerical values, such as temperatures, are saved in the checklist. After this the numeric value will have its own field, in addition to the normal comment field, when filling the list.

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4. A color is selected for the checklist to make it easier to manage the lists. If no color is selected, the checklist is displayed on a green background by default.
5. If you have an organization license, the created checklist will be distributed to all units in the organization by selecting **“This checklist is shared with all units”**. These units fill in checklists but cannot edit shared checklist fields or settings.
6. Guidelines for performing the checks are written in the template. Indicate what is required for the correct performance of the check / task, e.g. the accessories to be used (detergent, etc.).
7. When the checklist is complete, click **“Save checklist”**.

Figure 1.  
Creating a checklist window.

Once the checklist is created, it will appear on the **“Checklists”** tab of the service. If the checklist has a completion time, an icon appears in front of the checklist name. The icon flashes if the checklist is not filled within the specified time.

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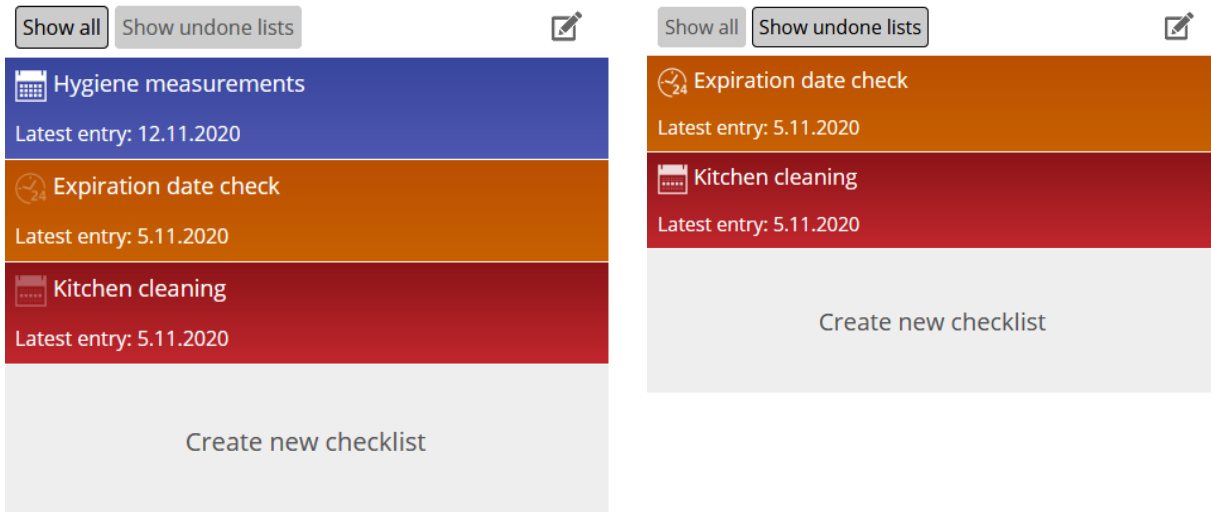


Figure 2. Checklist views on the service.

## FILLING IN THE CHECKLIST

### Example:

The “Kitchen cleaning” checklist created in the previous step is filled in as follows:

1. Choose the checklist.
2. Click “Add new entry”.
3. Fill in all data fields.
4. Save the entry with:
  - ”Rejected”,
  - ”Accepted with corrections” or
  - ”Accepted” button.

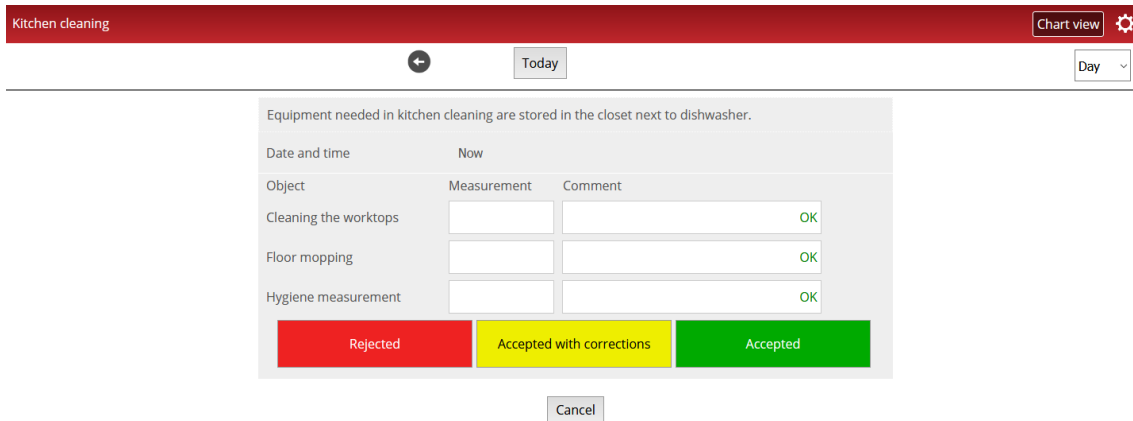


Figure 3. Adding a checklist entry.

- The numerical measurement value is entered as a normal check entry. The only difference is the extra "Measurement" field before the comment in which the measurement result is entered.

To edit the checklist, select the "settings" icon. The checklist name, color, completion date, instructions, and fields are changed here.

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## Review of implemented checklists

Completed checklists are viewed by selecting the checklist and then the desired review period on the right. Select the result of the check, for example “Rejected”, and the information filled in the checklist will be displayed. Click “Edit Entry” to edit the information entered.

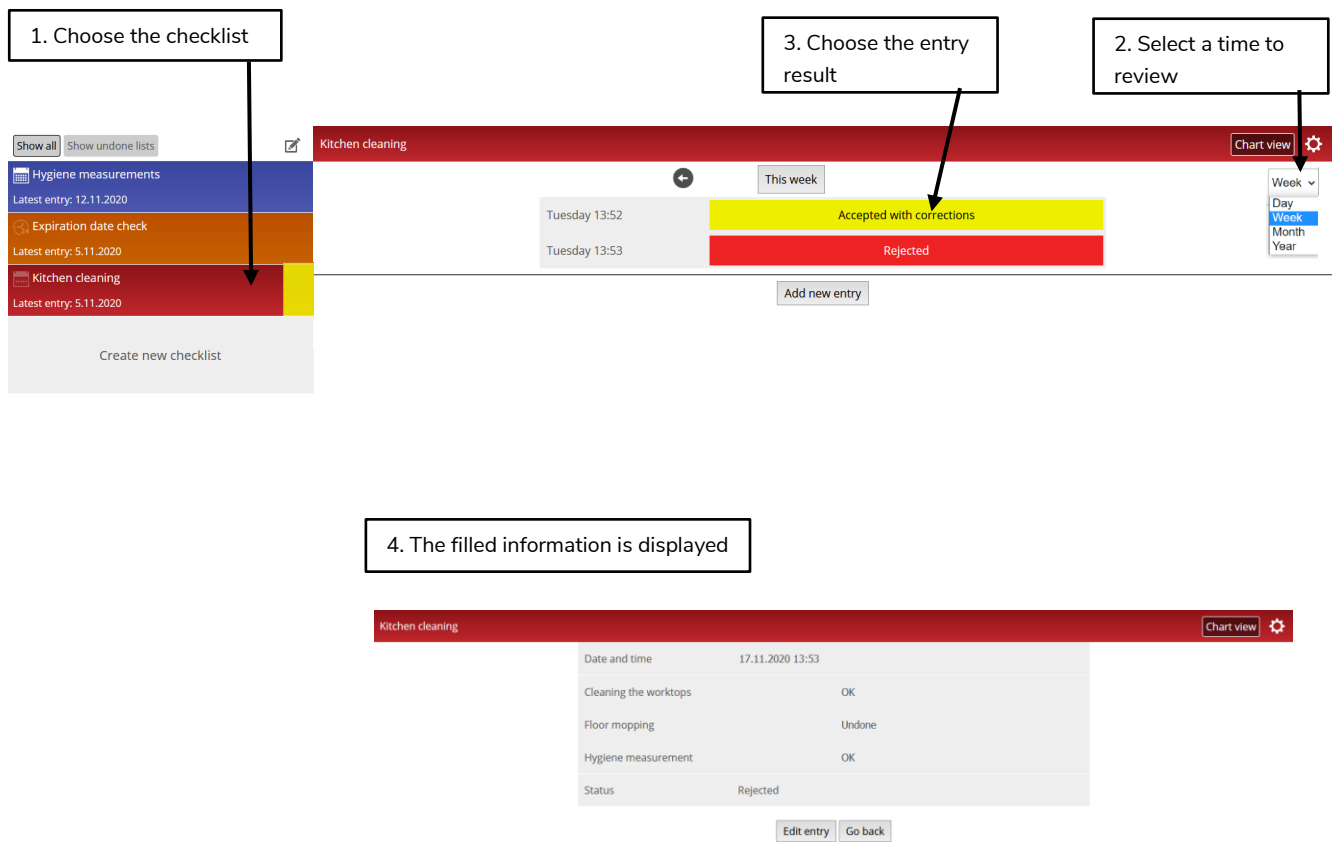


Figure 4. Examining the completed checklist.