Checkit App Best Practice Guide (for Administrators)

Version 1

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Contents

1. Introduction

What is Checkit?

The Checkit App is a mobile application used to complete digital checklists. Your organisation may use mobile devices provided by Checkit such as the Motorola G75 or you can download the app on your own phone or tablet. Checklists are assigned to locations and teams. Depending on the type of checklist, they may be configured to be completed at scheduled intervals, for example, daily cleaning checklists, or as and when necessary, for example, checklists to record deliveries.

Checkit Kit & Tools

You will have the following Checkit kit and tools on site:

- **The Checkit App:** a mobile application used to complete digital checklists
- **Probes**: which are used to measure the temperature of food and send the reading directly to the Checkit App via Bluetooth
- **The Control Centre**: a cloud portal where you can manage sensors, assigned work, alerts, team, and users, and view reports

Alerts

There are 2 types of alerts:

- **Check Alerts:** are triggered if staff uncover an issue when completing a checklist
- **Overdue Alert:** are triggered if a checklist is not completed on time

User are notified of alerts via email and they can be managed in the Control Centre.

Reports

There are 2 reports available in the Control Centre:

- **Work Report**: a record of work completed on the Checkit App
- **Alerts Report**: a record of all actions taken to resolve an alert

User Roles

There are 4 user roles. Your role will determine your responsibilities.

Users may be assigned multiple roles, to multiple locations, and to multiple teams.

- **Administrators:** are assigned to locations. They are responsible for:
    - Managing mobile devices running the Checkit App
- **Safety Managers:** are assigned to locations. They are responsible for:
    - Responding to check alerts and overdue alerts triggered at their location
    - Account configuration (users, teams, checklists, schedules, work, and advanced configuration)
- **Supervisors**: are assigned to teams. They are responsible for:
    - Completing work assigned to their team on the Checkit App
    - Responding to check alerts and overdue alerts triggered by their team
    - Managing users in their team
- **Operators**: are assigned to teams. They are responsible for:
    - Completing work assigned to their team on the Checkit App

2. Onboarding New Staff

Follow the steps below when onboarding new staff to ensure they have access to the system, know what their responsibilities are, and know how to complete them.

Best Practice

- Create user accounts for new staff members when they join

  Note: Administrators can only create accounts for Safety Managers and other Administrators

  Note: If your account uses Single Sign-On, your IT department must add users to the Checkit App in your identity provider account (e.g., Microsoft Entra, Google Workspace, Okta, etc.) before you can create the user in the Control Centre

- Use the onboarding email template below to formally communicate access, responsibilities, and required learning resources

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Email Template

Dear [**add name**],

A Checkit account has been created for you (the system we use to manage workflow).

You are a [**Safety Manager / Administrator]** of **[X location]**

You can access your account at app.checkit.net

In order to learn about the Checkit system, please:

- Watch the Checkit Training Videos
- Read the Checkit Best Practice Guide
- Download the Checkit Quick-Start Guide and save it on your desktop
- Save the Checkit Help Centre link to your bookmarks

Kind regards,

[**Add name]**

3. User Management

Follow the steps below to ensure staff have the correct access, understand their responsibilities, and that all roles are adequately covered.

Best Practice

- Create user accounts for new staff members when they join

  Note: Administrators can only create accounts for Safety Managers and other Administrators

  Note: If your account uses Single Sign-On, your IT department must add users to the Checkit App in your identity provider account (e.g., Microsoft Entra, Google Workspace, Okta, etc.) before you can create the user in the Control Centre

- Ensure there are enough staff assigned to each user role to maintain adequate coverage

- Ensure there are at least two Safety Managers and Administrators on the system at all times

- Ensure all users watch the Checkit training videos annually. We offer a quiz to accompany our training videos so your training manager can create a Checkit module in your learning platform, assign it to staff, and track progress. Please contact us if you would like to integrate Checkit training in your learning platform

- Immediately delete users when staff leave

  Note: If your account uses Single Sign-On, users must also be deleted from your identity provider (e.g. Microsoft Entra, Google Workspace, Okta)

4. When Staff Leave

Follow the steps below when staff leave to ensure their access is removed

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Best Practice

- Delete users when they leave your organisation to ensure they no longer have access to the Checkit system

  Note: If your account uses Single Sign-On, users must also be deleted from your identity provider (e.g. Microsoft Entra, Google Workspace, Okta)

5. Service Interruptions

Checkit is designed to be highly reliable and is available 99.9% of the time. However, there may be rare occasions where the system is temporarily unavailable due to either planned maintenance or unplanned outages.

Planned Outages

From time to time, scheduled maintenance may be required to maintain system performance and security. We aim to keep planned outages as infrequent and as short as possible.

- Planned outages are communicated at least 30 days in advance.

Unplanned Outages

In rare cases, an unexpected outage may occur.

- You will be notified as soon as possible if an unplanned outage occurs
- Our teams will work to restore service as quickly as possible

What Happens During an Outage

Checkit has a robust architecture with redundancy built in to protect your data.

- Staff can continue to complete checklists on the Checkit App
- Work data is stored locally on mobile devices while the cloud service is unavailable
- You cannot assign new work or edit existing work while the cloud service is unavailable
- You will not receive alert notifications during the outage
- You may not be able to log in to the Control Centre

What Happens When Checkit Comes Back Online

Once the service is restored:

- You will be notified as soon as Checkit is back online
- You will be able to log in to the Control Centre as normal
- Alert notifications will resume
- No data is lost during the outage

Best Practice

- Ensure your organisation has an SOP in place for operating during Checkit service interruptions, ensure relevant staff are trained on these procedures

6. General Upkeep

Regular system upkeep helps ensure your Checkit system remains compliant and reflects current operational responsibilities.

Best Practice

- Ensure there are at least two Administrators and Safety Manager registered on your account
- Ensure all users watch the Checkit training videos annually. We offer a quiz to accompany our training videos so your training manager can create a Checkit module in your learning platform, assign it to staff, and track progress. Please contact us if you would like to integrate Checkit training in your learning platform
- Review mobile devices running the Checkit App that are registered on your account and block any devices that are no longer in use

7. Recommended Optional Feature

Checkit includes optional features that can improve alert response, security, and workflow efficiency. These can be enabled on request.

Recommended Enhancements

- Alert Escalations: escalate alerts to parent locations if they are not cleared within a specified period
- Checklist Subject: add a tag to distinguish between multiple checklists of the same type (e.g. *Checklist: Deliveries, Subject: Dairy*; *Checklist: Deliveries, Subject: Pastries*)
- Checkpoints: define individual assets or locations on site so the same checklist can be completed against each one (e.g. *Fire Door 1*, *Fire Door 2*), with the option to assign a QR code or NFC tag to trigger the checklist
- Custom Roles: define roles (e.g. *Cleaning Manager*) and restrict certain checks—such as final sign-off—to those roles to ensure quality control
- Delayed Checks: configure a check to trigger a follow-up task after a set period of time (e.g. *put food in hot hold→ 2 hours later, remove any unsold items from sale*)
- Links to Webpages, Documents, Photos, & Videos: add links to instructional material in checks (e.g. fridge user manuals, health & safety guides)
- Machine Readable Alerts: convert alerts to a machine-readable format to integrate with your in-house/third-party systems
- Operational Insights: a dashboard which summarises the performance of your locations and teams within the last month, highlighting problems such as work not completed
- Shared Libraries: import and export checklist libraries between accounts to share standard processes with subsidiaries, franchises, or acquired companies