BEACON HELP · GUIDE

Action plans

Working through, reviewing and verifying actions



BEACON VERSION
2026.11

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FOR
Nursery managers, room leaders and area support

ONLINE
help.beacon.earlytree.co.uk

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Screenshots show a fictional nursery group and people.

Contents

Action plans: working through, reviewing and verifying actions. These steps match Beacon 2026.11; for another version, see help.beacon.earlytree.co.uk. Beacon runs at your organisation's own address.

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Reading the screenshots. The orange numbers 1 on a picture match the numbers in the step text, and an orange box marks the part of the screen a step is about. Every guide is also online, with search, at help.beacon.earlytree.co.uk.

ACTION PLANS

About action plans

When an inspection is signed off, Beacon turns what the inspector found into an **action plan**: a list of actions, each with a title, what needs to happen, the evidence needed to close it, a role and person who owns it, and a due date. Every action has a reference such as **BH/0002/004**: the nursery's site code, the inspection number and the action number. Quote it when you talk or write about the action.

You'll find every action you can see on **Action Plans** in the menu, as a board with a column for each status. Each inspection also has its own action plan page, which you can export as a PDF.

The statuses

Status	What it means
Open	Nobody has started it yet.
In Progress	Someone is working on it, or waiting for something that's already in motion (an order, a contractor booked).
Blocked	Nobody can move it forward right now: a decision, approval, access or money is needed from someone else.
Done	The work is finished and the evidence is on the action, ready for area support to check.
Verified	Area support has checked the evidence and closed the action.

An action is **overdue** when its due date has passed and it isn't Done or Verified. Overdue cards have a red border and an **OVERDUE** badge. Verified actions drop off the board 7 days after they were verified.

Who can do what

	Area support manager or lead	Nursery manager, kitchen lead, maintenance manager	Room leader	Read-only auditor
See actions before the inspection is signed off	Yes	No	No	Yes
Move an action between Open, In Progress, Blocked and Done	Yes	Yes	Only actions assigned to them or to the Room Leader role	No
Post updates, photos and @mentions	Yes	Yes	As above	No
Mark an action **Verified**	Yes	No	No	No
Change the due date, role or owner	Yes (see note)	No	No	No

Everyone only sees actions for the nurseries they're assigned to. An action you can't change opens as **View only**, and the status buttons only offer the moves your role can make. Area support leads are allowed to change the due date, role and owner, but in this release those controls on the action only show for area support managers.

Guides

- The action plans board
- Working on an action
- Marking an action as blocked
- Reviewing, reassigning and verifying actions
- Actions tracked on the maintenance list
- An inspection's action plan and PDF

ACTION PLANS

Action plans: the board

WHO IT'S FOR
Area support manager · Area support lead · Nursery manager · Room leader

WHERE TO FIND IT
Action Plans

TIME
A few minutes

Purpose

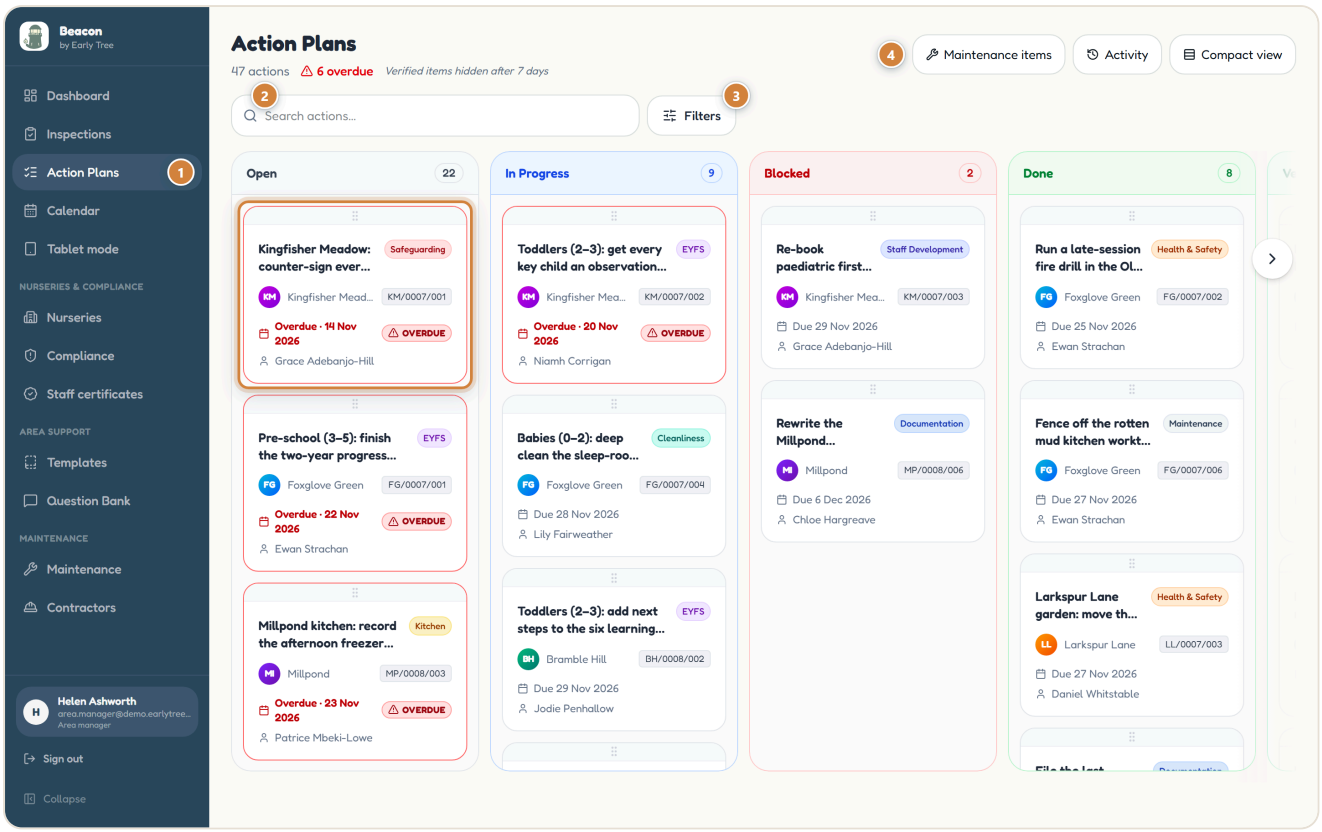
See every open action across your nurseries in one place, spot what's overdue or blocked, and narrow the board down to the actions you need: one nursery, one section, one person, one room or a date range.

Before you start

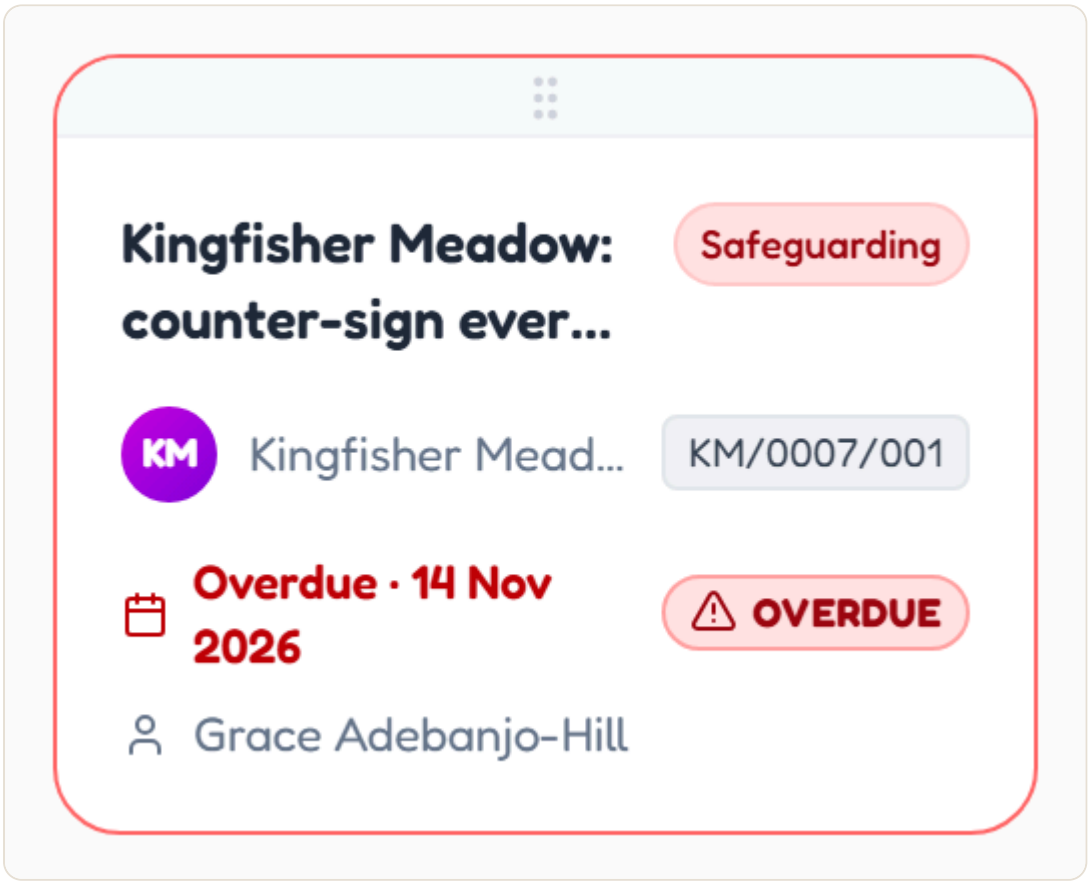
- You can see actions for the nurseries you're assigned to. Area support see all of them; everyone else sees a nursery's actions once its inspection report has been signed off.
- The board shows actions from signed-off reports only, unless you're area support (who also see actions on reports still in review). Read-only auditors can look at both, but not change anything.

Open the board

1. In the menu, select **Action Plans** 1. The board has a column for each status: **Open**, **In Progress**, **Blocked**, **Done** and **Verified**. At the top you'll see how many actions there are and how many are overdue.
2. Each card (highlighted in the picture) shows the action's title, its section (for example **Safeguarding**), the nursery, its reference, its due date and who owns it. Overdue cards have a red border and an **OVERDUE** badge.
3. Select a card to open the action. See Working on an action.



The action plans board. The highlighted card is one action.



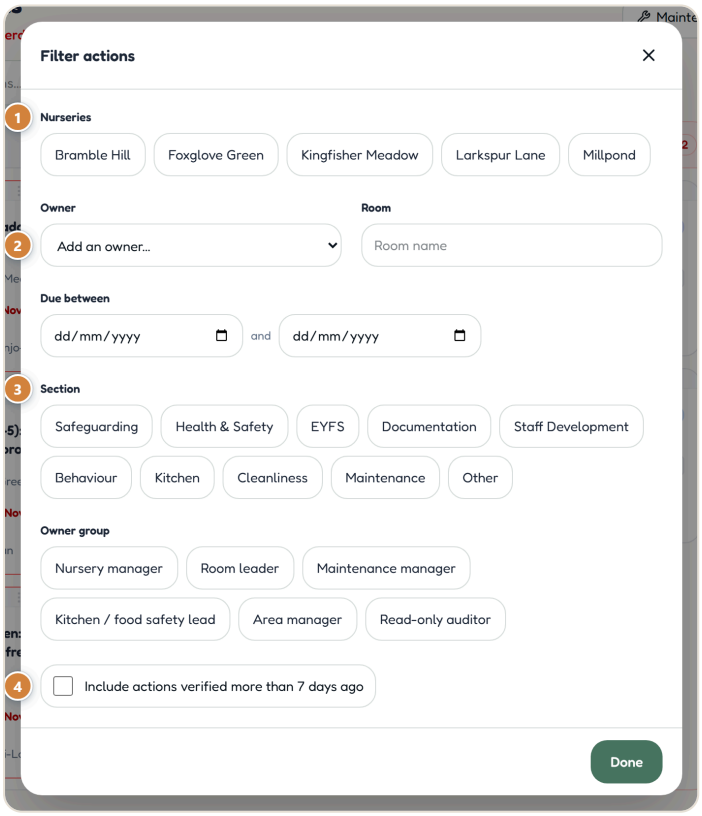
An action card: title, section, nursery, reference, due date and owner.

Search and filter the board

To find an action by its words, type in **Search actions...** 2 (the title, description, what needs to happen or the evidence) and press **Enter**.

For everything else, select **Filters** 3. The filters you choose are kept in the page address, so you can bookmark a filtered view or send it to a colleague.

1. Select **Filters**. The **Filter actions** window opens.
2. **Nurseries** 1 (area support only): select one or more nurseries. Nursery staff only ever see their own nursery.
3. **Owner** 2: choose **Add an owner...** to show the actions owned by one or more people. **Room**: type part of a room's name to show actions raised in that room. **Due between**: choose a date range.
4. **Section** 3 and **Owner group**: select one or more sections (such as **Health & Safety**) or roles (such as **Nursery Manager**). Select one again to turn it off.
5. Tick **Include actions verified more than 7 days ago** 4 to see older finished actions too.
6. Select **Done**.



The Filter actions window.

Each filter you've chosen shows as a chip next to **Filters**, with a count on the button. Select the cross on a chip to remove that filter, or **Clear all** to go back to everything.

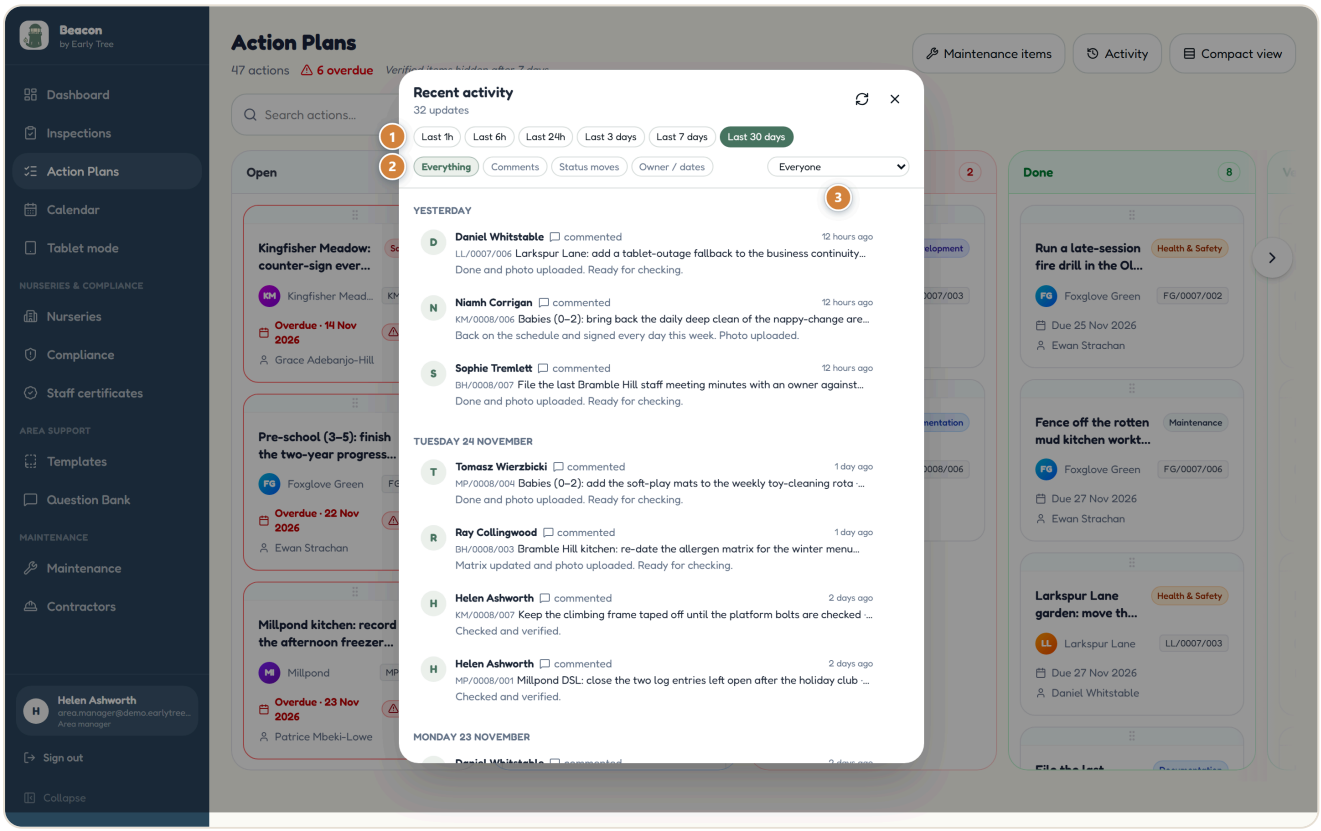
Change how the cards look

Select **Compact view** to show each card on one line, which helps when a column is long. Select **Full view** to go back. Beacon remembers your choice on this device.

See what's happened recently

Select **Activity** to see who has commented on, moved or reassigned actions recently.

1. Choose a time window (1): **Last 1h** up to **Last 30 days**.
2. Choose what to show (2): **Everything**, **Comments**, **Status moves** or **Owner / dates**.
3. To see one person's activity, choose them from the list (3).
4. Select an entry to open that action in a new tab. Close the window with the cross at the top.



Recent activity across the actions you can see.

What you should see

> The board shows only the actions that match your filters, with a count at the top. Overdue actions are counted in red next to the total.

Common problems

An action I expected isn't on the board.
Check the filter chips first, and tick **Include actions verified more than 7 days ago** under Filters if it was verified more than a week ago. If you're not area support, the inspection's report may not be signed off yet. Maintenance actions are kept on the maintenance list instead: select **Maintenance items** 4 (see Actions tracked on the maintenance list).

I can't see the Nurseries filter.
It only shows for area support, who can see more than one nursery.

The Verified column is off the edge of the screen.
Scroll the columns sideways, or select the arrow at the edge of the board.

I dragged a card and it jumped back with "Failed to update status".
You may not be allowed to make that change (only area support can move an action to **Verified**), or you lost your connection. Try again, or open the action and change its status there.

Related guides

- About action plans
- Working on an action
- Reviewing, reassigning and verifying actions
- The calendar

ACTION PLANS

Action plans: working on an action

WHO IT'S FOR

Nursery manager · Room leader · Kitchen lead · Maintenance manager · Area support

WHERE TO FIND IT

Action Plans › **select a card**

TIME

A few minutes per update

Purpose

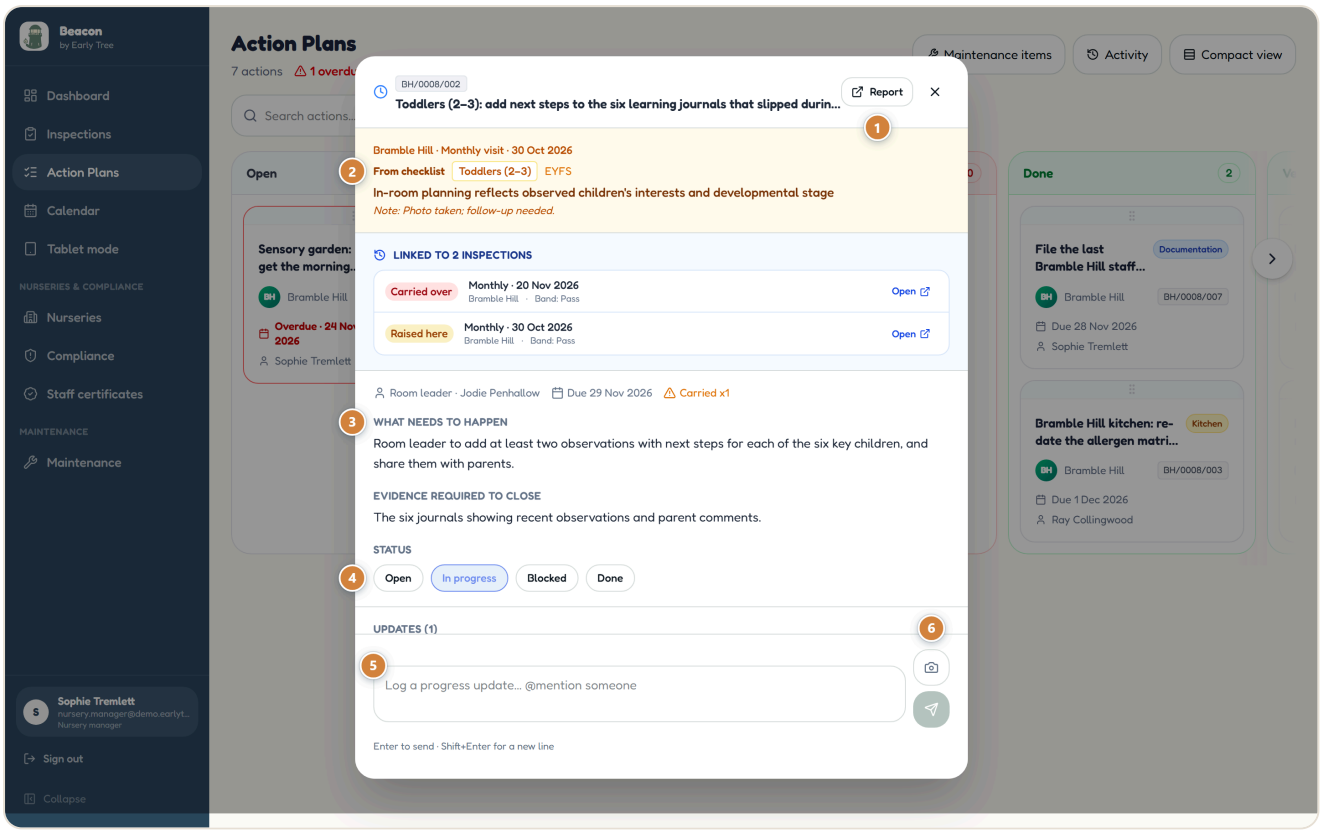
Keep everyone up to date as you work through an action: what you've done, what you're waiting for, and the evidence that it's finished. Every update, photo and status change is kept on the action with your name and the time, so area support can see the progress and check the evidence before they verify it.

Before you start

- The action is on the action plans board for your nursery. See The action plans board.
- To add a photo, have it on the device you're using (on an iPad or phone you can take it there and then).

Open the action

1. In the menu, select **Action Plans**, then select the action's card. The action opens in a window over the board.
2. Select **Report** 1 to open the inspection report it came from, in a new tab.
3. The yellow box 2 shows where the action came from: the nursery, the visit, the room, the checklist item that failed and the inspector's note. If the same problem was found again at later visits, **Linked to … inspections** lists them, marked **Raised here** or **Carried over**.
4. Read **What needs to happen** 3 and **Evidence required to close**. The evidence is what area support will look for before they verify the action.
5. The line above shows the owner, the due date (in red with **Overdue** if it has passed) and **Carried x2** if the action has been carried over from earlier inspections.



An action open from the board.

Post an update

1. In the box at the bottom 5, write what you've done or what you're waiting for. Type @ and start typing a name to mention a colleague; they're sent an email with your update (if your organisation has email switched on).
2. To add photos, select the camera button 6 and choose one or more pictures. They appear above the box; select the bin on one to remove it before you post.
3. Press **Enter**, or select the send button, to post the update. (**Shift** and **Enter** starts a new line.)

Change the status

1. Under **Status** 4, select the new status. You only see the statuses your role can choose.
2. Select **Done** when the work is finished and the evidence (photos, a note of where the paperwork is) is on the action.
3. If nobody can move the action forward, select **Blocked**: Beacon asks why first. See Marking an action as blocked.

You can also drag a card from one column to another on the board. On an iPad, press and hold the card for a moment before you drag it.

What you should see

> **Saved** appears briefly, the status button you chose is highlighted and Beacon adds a note to the updates, such as "Status changed from Open to InProgress". Your update appears under **Updates** with your name, the time and any photos. On the board, the card moves to its new column.

Common problems

There's no Verified button.
Only area support can verify an action, after checking the evidence. Select **Done**; area support will verify it.

The action says "View only" and there's no update box.
Your role can look at this action but not change it: for example, a room leader can only work on actions assigned to them or to the Room Leader role, and a read-only auditor can't change anything. Ask the action's owner or your manager.

"... is not an image" when adding a photo.
Only photos and other images can be attached to an update. Note where a document is kept in the update instead.

I can't change the due date or owner.
Only area support can reassign or reschedule an action. Post an update asking for more time, and @mention your area support manager.

The person I @mentioned didn't get an email.
Mention emails are only sent when your organisation has Beacon's email switched on. They'll still see the update on the action.

"This action item was merged or deleted and cannot be edited".
Area support merged it into another action, or removed it, while you had it open. Close it and look for the action it was merged into on the board.

Related guides

- The action plans board
- Marking an action as blocked
- Reviewing, reassigning and verifying actions
- Actions tracked on the maintenance list

ACTION PLANS

Action plans: marking an action as blocked

WHO IT'S FOR

Nursery manager | Room leader | Kitchen lead | Maintenance manager | Area support

WHERE TO FIND IT

Action Plans › **select a card** › **Status** › **Blocked**

TIME

A minute

Purpose

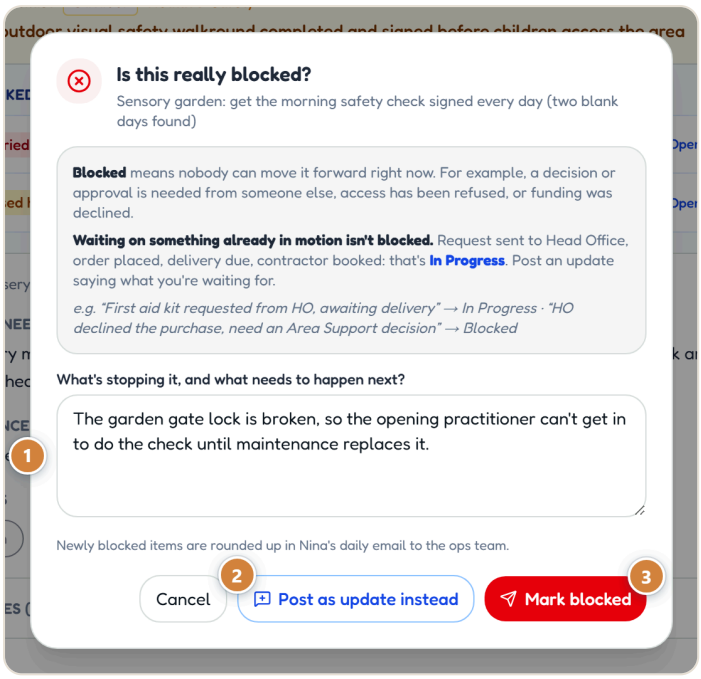
Tell area support that an action can't move forward, and why, so the right person can unblock it. **Blocked** means nobody can move it forward right now: for example, a decision or approval is needed from someone else, access has been refused, or funding was declined. Waiting for something that's already in motion (an order placed, a contractor booked) isn't blocked: that's **In Progress**, with an update saying what you're waiting for.

Before you start

- Open the action. See Working on an action.
- Know what's stopping it and what needs to happen next: that's what Beacon asks for.

Mark an action as blocked

1. Under **Status**, select **Blocked**, or drag the card into the **Blocked** column on the board. The **Is this really blocked?** window opens.
2. If the action isn't yours, Beacon says so and who owns it. If you're waiting on them, it's usually better to post an update and @mention them. To mark it blocked anyway, tick **I know this isn't my item and it genuinely can't move forward.**
3. Under **What's stopping it, and what needs to happen next?** 1, write the reason. If what you write sounds like something already in motion, Beacon suggests posting it as an update instead.
4. Select **Mark blocked** 3. Or, if it isn't really blocked, select **Post as update instead** 2: your note is posted as an update, and an Open action moves to In Progress.



Beacon checks the action really is blocked, and asks why.

What you should see

> The action moves to **Blocked**, and its updates show "Status changed from … to Blocked" with your reason underneath. If you chose **Post as update instead**, your note appears under **Updates** and the action stays where it was (or moves from Open to In Progress).

Common problems

Mark blocked is greyed out.

Write a reason first. If the action isn't yours, also tick the box to confirm.

I selected Cancel by mistake.

Nothing was saved and the card goes back to where it was. Select Blocked again.

The window mentions a daily email to the ops team.

That round-up is sent by Nina, the AI assistant, only where your organisation has Nina and email switched on. Either way, the reason is kept on the action for area support to see.

Related guides

- Working on an action
- The action plans board
- About action plans

ACTION PLANS

Action plans: reviewing, reassigning and verifying actions

WHO IT'S FOR	WHERE TO FIND IT	TIME	YOU NEED
Area support manager Area support lead	**Action Plans** › **select a card**	A few minutes per action	Area support manager or lead

Purpose

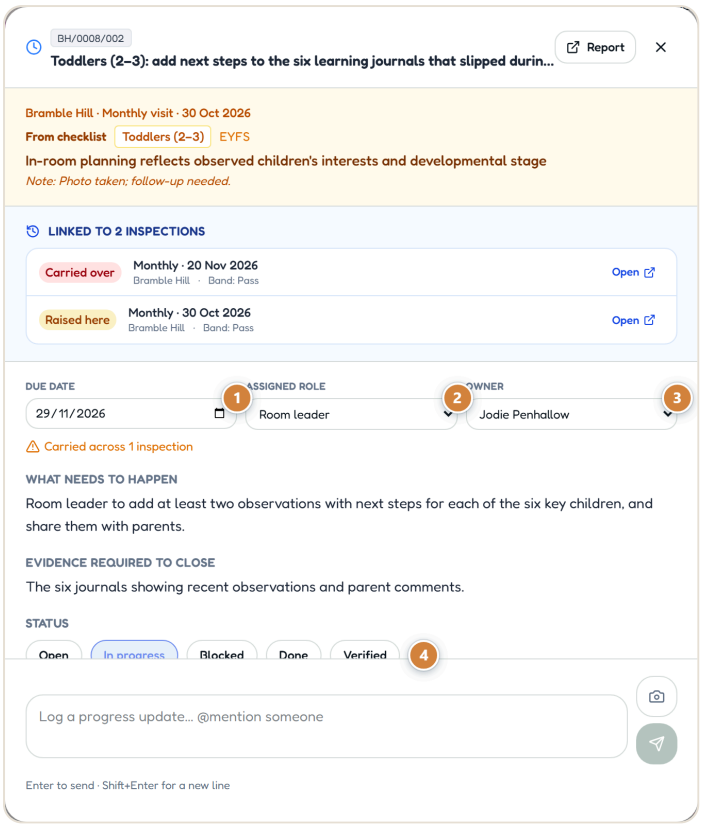
Keep each nursery's action plan honest: make sure every action has the right owner and a realistic date, chase the ones that are overdue, and close actions only when the evidence shows the work is really done.

Before you start

- You're an area support manager or lead for the nursery.
- Agree new dates with the nursery before you move them, and note why in an update.

Change the due date, role or owner

1. In the menu, select **Action Plans**, then select the action's card.
2. Change **Due date** 1. The change is saved when you leave the box.
3. Change **Assigned role** 2, the role responsible (for example **Nursery Manager** or **Maintenance Manager**).
4. Change **Owner** 3 to the person responsible, or **Unassigned** to leave it with the role.



Area support can change the due date, role and owner, and verify the action.

Each change is saved straight away, and Beacon adds a note to the action's updates saying what changed. Moving the due date into the future means the action is no longer overdue, and the overdue reminder (where email is switched on) is sent again if it becomes overdue later.

Chase overdue actions

1. On the board, overdue cards have a red border and an **OVERDUE** badge, and the number overdue shows at the top.
2. Use the **Due** and **to** dates, or a nursery, to narrow the board down.
3. Open each overdue action. A red box says **This item is overdue — extend the date above or update the status. Carried across 2 inspections** means the same finding has come up again at later visits.
4. Post an update and @mention the owner, or agree a new date and change it.

Where your organisation has Beacon's email switched on, the owner is also emailed once, the day after an action becomes overdue.

Verify an action

1. Open an action in the **Done** column.
2. Check the updates and photos against **Evidence required to close**. If you need to see it in the room, do it at your next visit.
3. If the evidence is there, select **Verified** 4. If not, select **In Progress** and post an update saying what's missing.

What you should see

> The action moves to **Verified**, with your name and the date recorded, and the updates show "Status changed from Done to Verified". After 7 days it drops off the board (select **Show old verified** to see it again).

Common problems

I'm an area support lead and I can't see the Due date, Assigned role and Owner boxes.
In this release they only show for area support managers, although leads are allowed to make these changes. Ask an area support manager, or post an update.

"Only Area Support Leads or Managers can reassign, retitle, reschedule, or verify an action item".
You don't have an area support role for that nursery. Ask your area support manager.

The person I want isn't in the Owner list.
They need a Beacon account with a role at that nursery. See Administration.

Related guides

- About action plans
- Working on an action
- The action plans board
- Review and sign-off

ACTION PLANS

Action plans: actions tracked on the maintenance list

WHO IT'S FOR
Area support | Nursery manager | Maintenance manager

WHERE TO FIND IT
Action Plans › **Maintenance items**

TIME
A minute

Purpose

Some actions are building and repair jobs for the maintenance team rather than tasks for the nursery. So that the same job isn't tracked in two places, Beacon manages these on the maintenance list and hides them from the action plans board. This guide explains which actions that applies to and how they close.

Before you start

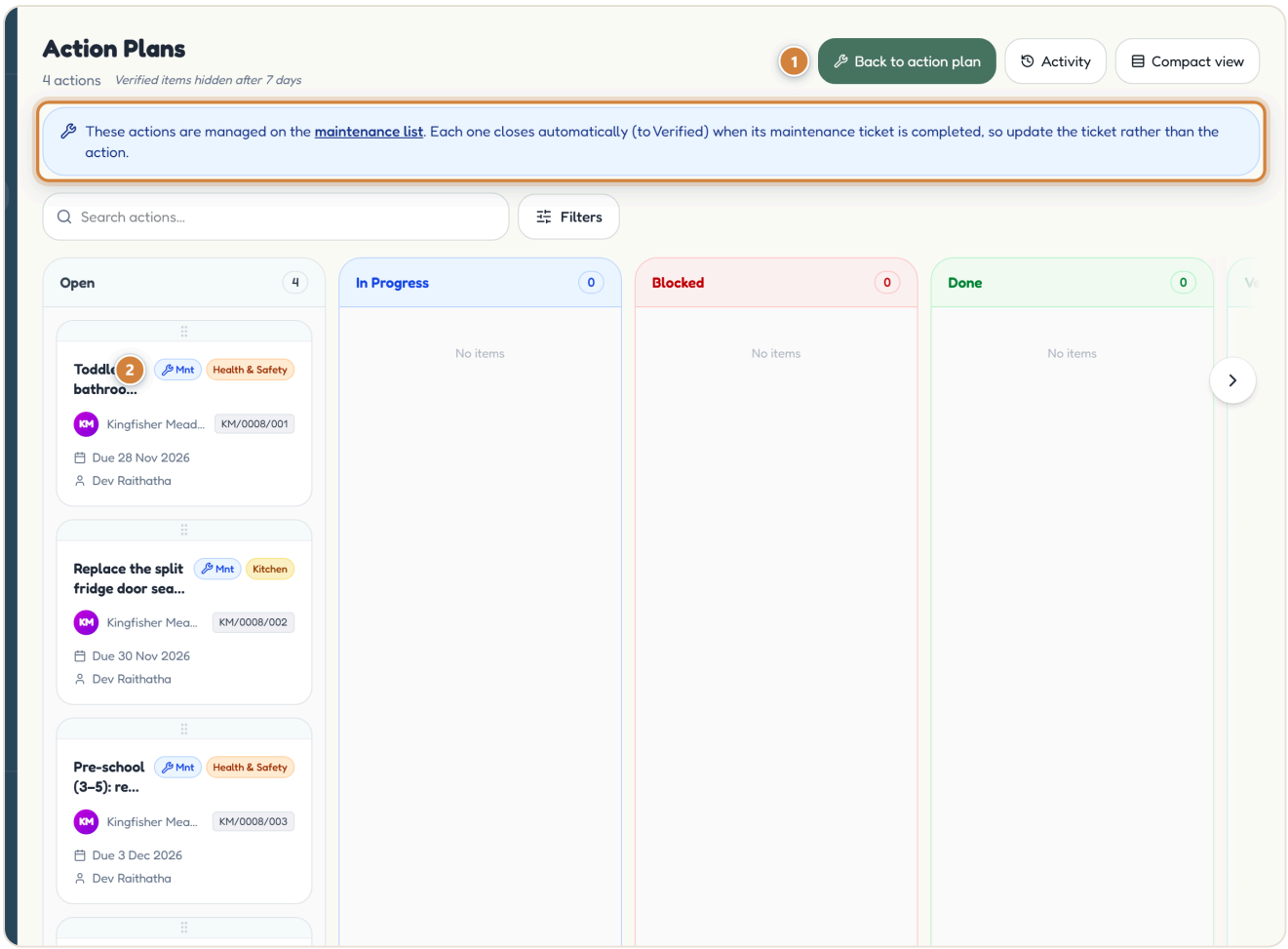
An action is tracked on the maintenance list when:

- it was raised from a maintenance note made during the inspection, so it already has a maintenance ticket; or
- it's in the **Maintenance** section and assigned to the **Maintenance Manager** role on a signed-off report. Beacon raises a maintenance ticket for it automatically (once a day).

Maintenance-section actions owned by the nursery itself (for example, assigned to the nursery manager) stay on the action plans board.

See the actions tracked on the maintenance list

1. In the menu, select **Action Plans**, then **Maintenance items**. The board now shows only the actions tracked on the maintenance list, with a blue note at the top.
2. Each of these cards has a **Mnt** badge 2. Open one and select **Maintenance** to open its ticket in a new tab.
3. Select **Back to action plan** 1 to return to the normal board.



Actions managed on the maintenance list.

What you should see

> Each action closes by itself: when its maintenance ticket is completed, the action moves to **Verified**. If the ticket is reopened, the action is reopened too. So update the ticket, not the action.

Common problems

A maintenance action has disappeared from the board.
It's now tracked on the maintenance list. Select **Maintenance items** to see it, or find its ticket under **Maintenance**.

The ticket is finished but the action is still open.
The ticket has to reach **Completed**. Beacon also checks once a day and closes any it missed.

Related guides

- About action plans
- Maintenance

- The action plans board

ACTION PLANS

Action plans: an inspection's action plan and PDF

WHO IT'S FOR
Area support · Nursery manager · Room leader

WHERE TO FIND IT
Inspections › **an inspection's report** › **Action Plan**

TIME
A minute

Purpose

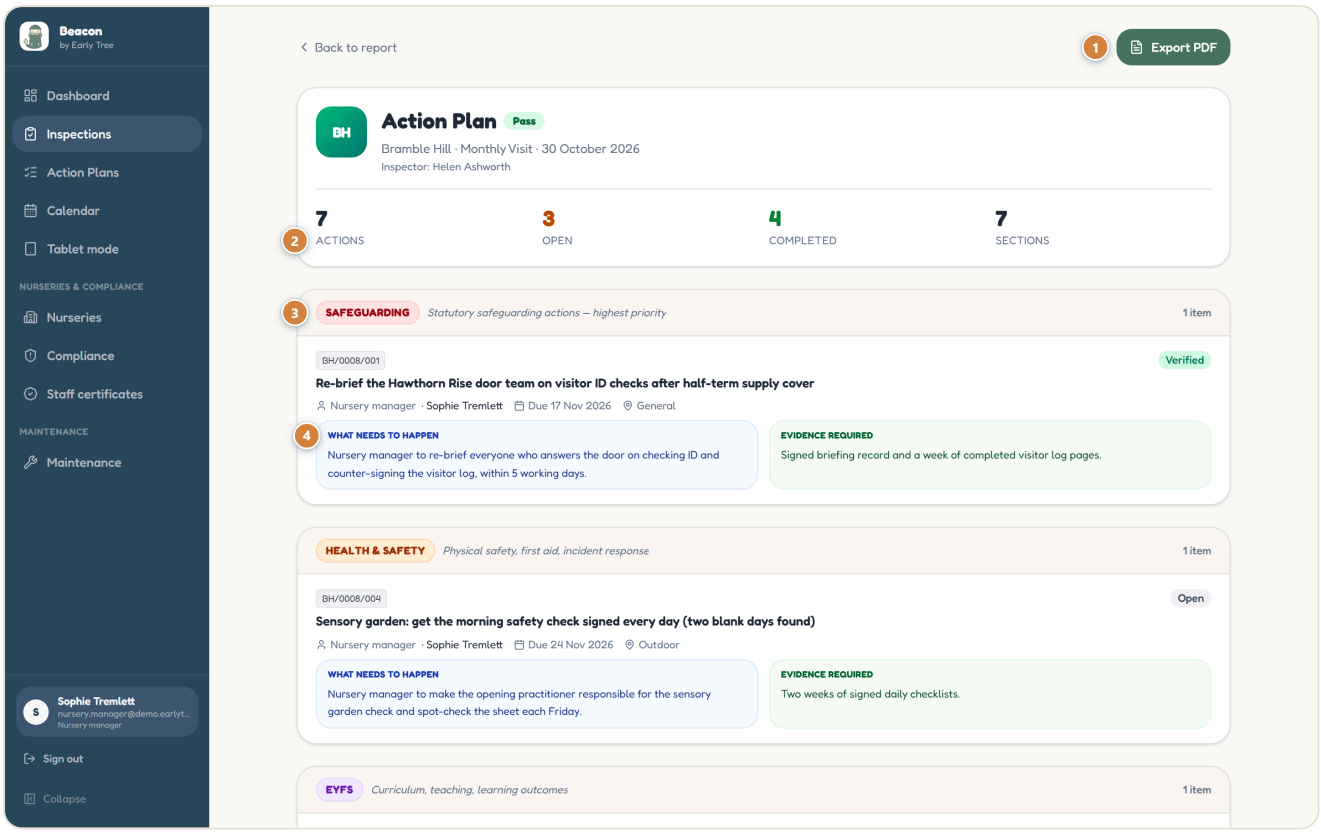
See everything one inspection asked a nursery to do, grouped by section with the most important first, and export it as a PDF to share at a team meeting or keep on file.

Before you start

- The inspection's report has been signed off. Area support and read-only auditors can see the action plan while the report is still in review; everyone else sees it after sign-off.

Open an inspection's action plan

1. Open the inspection's report: from **Inspections**, from the nursery's page, or by selecting **Report** on any of its actions. Then select **Action Plan** at the top of the report. (You can also download it straight away from the report with **Action Plan PDF**.)
2. The top of the page shows the nursery, the visit, the date, the inspector and the result. The counts 2 show how many actions there are, how many are still open and how many are completed.
3. Actions are grouped into sections 3, starting with **Safeguarding**. Each shows its reference, title, owner, due date, room, status, **What needs to happen** 4 and **Evidence required**.
4. To change an action, use the action plans board: this page is for reading and printing.



An inspection's action plan, grouped by section.

Export the action plan as a PDF

1. Select **Export PDF** 1. The PDF opens in a new tab.
2. Download, print or share it from there.

What you should see

> A PDF of the action plan with the nursery, the visit and every action as it stands right now. Export it again later to get an up-to-date copy.

Common problems

The page says it can't be found.

The report hasn't been signed off yet, or the inspection is for a nursery you're not assigned to.

"This inspection has no open action items."

Nothing in the inspection needed an action.

The PDF doesn't open.

Your browser may have blocked the new tab. Allow pop-ups for your Beacon address and try again.

Related guides

- About action plans
- The action plans board
- Review and sign-off