

## How to Add an Action Item...

**Action Items** help to organize a Learner's development efforts and allow for setting automated email reminders, assuring that development efforts remain visible and timely.

In addition to simply "listing" Action Items, Matrix Insights encourages Learners to journal about progress, include notations about why an item is important, and ultimately complete the item. A learner can even "un-complete" an item if future changes warrant.

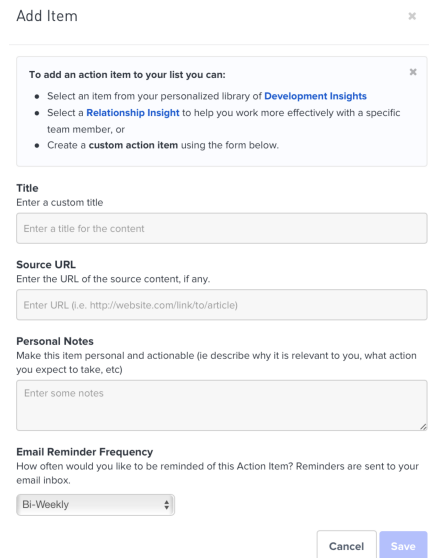
Learners can add as many Action Items as desired. Additionally, if the Learner is working with a Coach, the Coach can add, edit, and journal about a Learner's Action Items by using the **View As** option.

Action Items can be created from Matrix Insights content within **Relationship Insights** or **Development Insights** sections using the **+Add as Action Item** button.



A **Custom Action Item** can be created via the **+Add Item** link from the **Home** page and completing the pop-up form.

These can be anything people wish to bring attention to, track, or set email reminders for, such as a book to read, a YouTube video to view, or an on-the-job assignment to complete.



The screenshot shows a modal window titled "Add Item" with a close button (x) in the top right corner. Inside the modal, there is a section titled "To add an action item to your list you can:" with a close button (x) in the top right corner. This section contains three bullet points: "Select an item from your personalized library of [Development Insights](#)", "Select a [Relationship Insight](#) to help you work more effectively with a specific team member, or", and "Create a **custom action item** using the form below." Below this section are four input fields: "Title" (with the instruction "Enter a custom title" and a placeholder "Enter a title for the content"), "Source URL" (with the instruction "Enter the URL of the source content, if any" and a placeholder "Enter URL (i.e. http://website.com/link/to/article)"), "Personal Notes" (with the instruction "Make this item personal and actionable (e describe why it is relevant to you, what action you expect to take, etc)" and a placeholder "Enter some notes"), and "Email Reminder Frequency" (with the instruction "How often would you like to be reminded of this Action Item? Reminders are sent to your email inbox." and a dropdown menu currently set to "Bi-Weekly"). At the bottom right of the modal are "Cancel" and "Save" buttons.