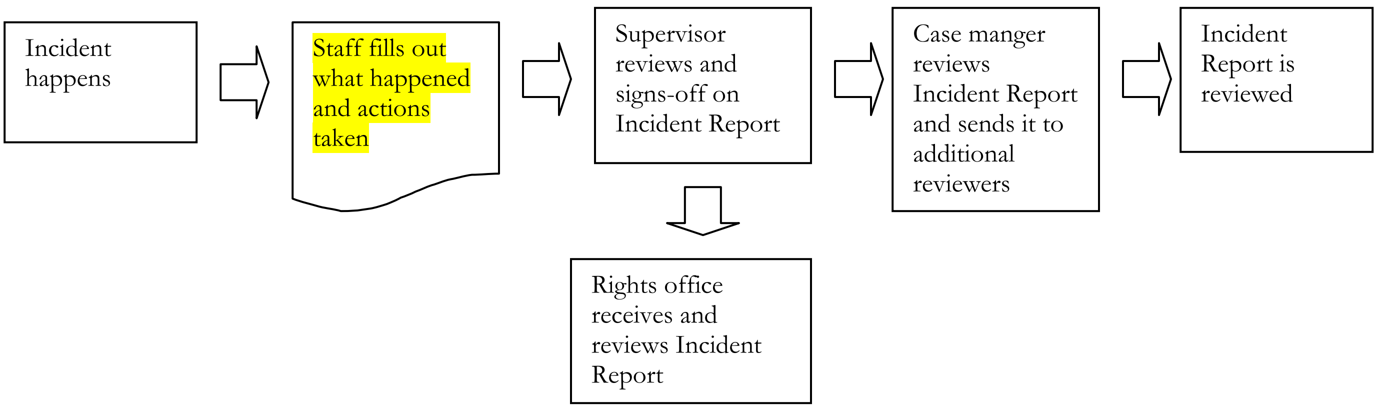
# Incident Reports: Provider Manual

## Entering Incident Reports

### *How to View, Add, Scan, Change, Clarify, Print, and Fax Incident Reports*

### *Overall Incident Report Process (Highlighted areas are covered in this section)*




*To **View Pending** Incident Reports:*

1. Click on the **Peer Review Documents** link in the Main Menu.


2. Click on Add new incident reports or complete a pending report link to the right of the Main Menu.


3. Search for Incident Reports by entering any of the following and click ***SEARCH***:
   a) Incident Number
   b) Incident Date
   c) Include Unknown Dates

To make the search results easier to navigate, you can sort them. Use the drop-down menus in the "Sort By" field to select the primary criteria you want the Incident Reports to be displayed by and whether you want the results to be in ascending or descending order. Use the "Then By" fields to sort the results further.

**Sorting**

| | | |
|---|---|---|
| Sort By: | Date/Time | Desc |
| Then By: | IR Code | Desc |
| Then By: | *Select one | Asc |
| Then By: | *Select one | Asc |

4. Click on the View link to the right of the report you want to view.

**1 Incident Reports** View Help

| Incident Details | Consumer(s) | Provider | Add Full IR<br>Add Scanned IR |
|---|---|---|---|
| **NUMBER**<br>1087<br>**DATE**<br>10/26/2007<br>**TIME**<br>9:00 AM<br>**STATUS**<br>Pending | John Doe | AAOG Ypsilanti | Change View<br>Clarification<br>Print IR<br>Fax IR |

5. In the View Incident Report screen, click on the small image of the Incident Report (if one is available) to bring up the document in a separate window. This document will be a scanned Incident Report or details of a report.

**Incident Report**

| **When was incident discovered?** | | **When did incident occur?** | |
|---|---|---|---|
| Date | Time | Date | Time |
| 10/15/2007 | 7:00 AM | 10/15/2007 | 9:00 AM |
| Check if Unknown | Check if Unknown | Check if Unknown | Check if Unknown |

**Where did the incident occur?**

| Provider | Incident Location | Author |
|---|---|---|
| Abdallah Zamaria MD | test | Kaylyn Krzyske |

**Involved Consumer(s)**

John Doe — Role:

CASE MANAGER: Laura R. Fucek LMSW

**Involved Staff**

Kaylyn Krzyske

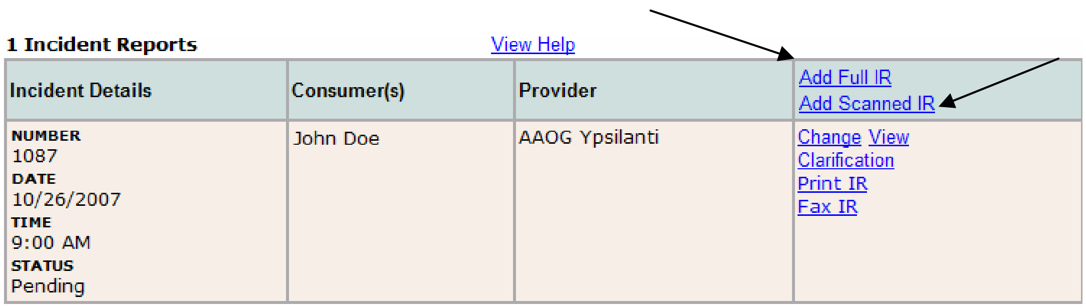
**Incident Reporting Code(s)**

06 - Injury/Accident: 0607 - Fall

### *To **Add** Incident Reports:*

Incident Reports can be added by one of two ways: you can scan a print version of the Incident Report into Encompass and enter a few basic details from the report, or you can fill out the entire report in Encompass. This section outlines how to do both.

1. Follow steps 1-3 under "To View Pending Incident Reports" on **page 2**.
2. To fill out the whole report in Encompass click on the Add Full IR link and then follow step 3. To scan a print version of a report, click on the Add Scanned IR link and skip steps 3 and follow step 4.




3. If you are filling out a full Incident Report fill in the following information:

| Field/Section: | Instructions: |
|---|---|
| **When was the incident discovered?** | Enter the date and time the incident was noticed. Use the icon to select the date or click the Use Current Date link to enter today's date. If the date and time are unknown, click on the "Check if Unknown" box under the unknown field(s). |
| **When did incident occur?** | Enter the date and time the incident happened. Use the icon to select the date or click the Use Current Date link to enter today's date. If the date and time are unknown, click on the "Check if Unknown" box under the unknown field(s). |
| **Provider** | Use the **lookup** button to select the provider that is reporting the incident. This field will pre-fill if the logged-in user is associated as a contact at any provider location.<br><br>**Note**: In rare cases, what is entered in the "Provider" field will not be where the incident occurred. In some cases Provider A might write an incident about a situation at Provider B. The "Provider" field should be set to Provider A because they wrote the report. |

| | |
|---|---|
| **Incident Location** | Enter the location where the incident occurred. If the incident happened in the provider's building, enter where in the building the incident happened. For example, if the consumer slipped in the bathroom enter "Bathroom." If the incident happened outside of the provider's building make sure to mention that in this field. For example, if the incident happened at Ted's Grocery Store enter "Ted's Grocery Store." |
| **Author** | The author of the Incident Report will pre-fill. Use the lookup button to change the author, if needed. If the author of the Incident Report cannot be found in the Lookup window, click on the "Temporary IR Staff" checkbox. The author does not have to be involved in the incident. |
| **Involved Consumer(s)** | Use the lookup button to select the consumer who was involved in the incident. Then select the consumer's role in the incident. If more than one consumer was involved, click on the Add new Line link to enter another consumer. Up to ten consumers can be added to a single report. If the consumer is not known, check the "Check if Anonymous Consumer" box. When a consumer is selected their case manager's name will pre-fill in the "CASE MANAGER" field. |
| **Involved Staff** | Use the lookup button to select all staff members who were involved with the incident. The staff member doesn't have to be part of an incident to be involved in it. Witnessing an incident or treating the consumer counts as being involved. Click the Add new Line link to enter up to five more staff members, if needed. Check the box below the field to indicate temporary staff members. |
| **Explain what Happened/ Describe Injury (if any)** | Explain what happened during the incident. If the consumer was injured, make sure to describe the injury. |

| | |
|---|---|
| **Actions taken By Staff/ Treatment Given** | Explain any actions taken by staff to help the consumer and describe the treatment the staff gave the consumer. For example, “Staff helped the consumer off the floor and cleaned his cut.” |
| **Name of Treating Physician/Health Care/Medical Facility/Hospital** | If the consumer received treatment, enter the name of the physician and the place the consumer was treated at. |
| **Care Given** | If the consumer received care, enter the date and time the consumer received treatment for his or her injury. Use the icon to select the date. |
| **Phone Number** | Enter the phone number of the place that treated the consumer, if applicable. |
| **Extent of Injury** | Select whether the injury was “Serious” or “Non-Serious.” Select “Serious” for injuries that required medical follow up or resulted in hospitalization. |
| **Physician’s Diagnosis of Injury, Illness or Cause of Death, if known** | Enter the physician’s diagnosis of the consumer’s injury, if applicable. |
| **Author Supervisor** | Use the lookup button to select the author’s supervisor. This person will receive the form, sign-off on it, and send it to the consumer’s case manager. If the author is in a position to sign-off on his or her own incident reports, the author must send the form to his or her self. |
| **Scan Documents** | Click the Scan link to scan other supplemental documentation, such as an ER discharge form. For directions on scanning see “To Scan Incident Reports” on **page 9**. |
| **Notes** | Enter any information about the incident that has not already been entered in the form. This field should only include details about how the Incident Report was entered into the system. All relevant details about the incident itself should be included in the “What Happened” and “Actions Taken” fields. |
| ✓Spell Check | Click this button to check your spelling. |

| | |
|---|---|
| SAVE | Click ***SAVE*** to save the Incident Report with a "Pending" status and finish it later.<br><br>**Note**: If you click ***SAVE***, the Incident Report is not completed. You must return to the report later to complete it. To do this, follow the instructions under "To Change Incident Reports" on **page 11**. |
| SAVE & SEND FOR SIGN-OFF | Click ***SAVE & SEND FOR SIGN-OFF*** to save the Incident Report and send it to be signed. Upon clicking this button, a notification will be sent to the user specified in the "Author Supervisor" field. |

4. If you are filling out a scanned version of an Incident Report fill in the following information:

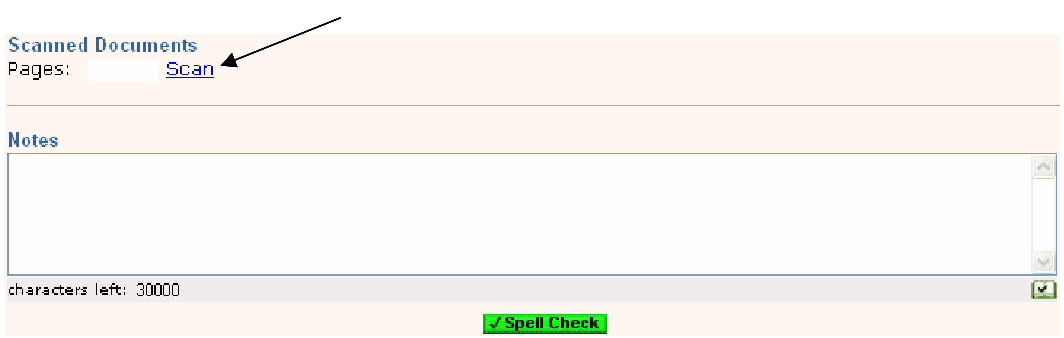
| Field/Section: | Instructions: |
|---|---|
| **When was the incident discovered?** | Enter the date and time the incident was noticed. Use the icon to select the date or click the Use Current Date link to enter today's date. If the date and time are unknown, click on the "Check if Unknown" box under the unknown field(s). |
| **When did incident occur?** | Enter the date and time the incident happened. Use the icon to select the date or click the Use Current Date link to enter today's date. If the date and time are unknown, click on the "Check if Unknown" box under the unknown field(s). |
| **Provider** | Use the lookup button to select the provider that is reporting the incident. This field will pre-fill if the logged-in user is associated as a contact at any provider location.<br><br>**Note**: In rare cases, what is entered in the "Provider" field will not be where the incident occurred. In some cases Provider A might write an incident about a situation at Provider B. The "Provider" field should be set to Provider A because they wrote the report. |

| | |
|---|---|
| **Incident Location** | Enter the location where the incident occurred. If the incident happened in the provider's building, enter where in the building the incident happened. For example, if the consumer slipped in the bathroom enter "Bathroom." If the incident happened outside of the provider's building make sure to mention that in this field. For example, if the incident happened at Ted's Grocery Store enter "Ted's Grocery Store." |
| **Author** | The author of the Incident Report will pre-fill. Use the lookup button to change the author if needed. If the author of the Incident Report cannot be found in the Lookup window, click on the "Temporary IR Staff" checkbox. The author does not have to be involved in the incident. |
| **Involved Consumer(s)** | Use the lookup button to select the consumer who was involved in the incident. Then select the consumer's role in the incident. If more than one consumer was involved, click on the Add new Line link to enter another consumer. Up to ten consumers can be added to a single report. If the consumer is not known check the "Check if Anonymous Consumer" box. When a consumer is selected their case manager's name will pre-fill in the "CASE MANAGER" field. |
| **Involved Staff** | Use the lookup button to select all staff members who were involved with the incident. The staff member doesn't have to be part of an incident to be involved in it. Witnessing an incident or treating the consumer counts as being involved. Click the Add new Line link to enter up to five more staff members, if needed. Check the box below the field to indicate temporary staff members. |
| **Incident Reporting Code(s)** | Use the lookup button to select the code(s) that best describes the incident. A description of each code can be displayed by clicking on the More Info link. Select all codes that apply. |

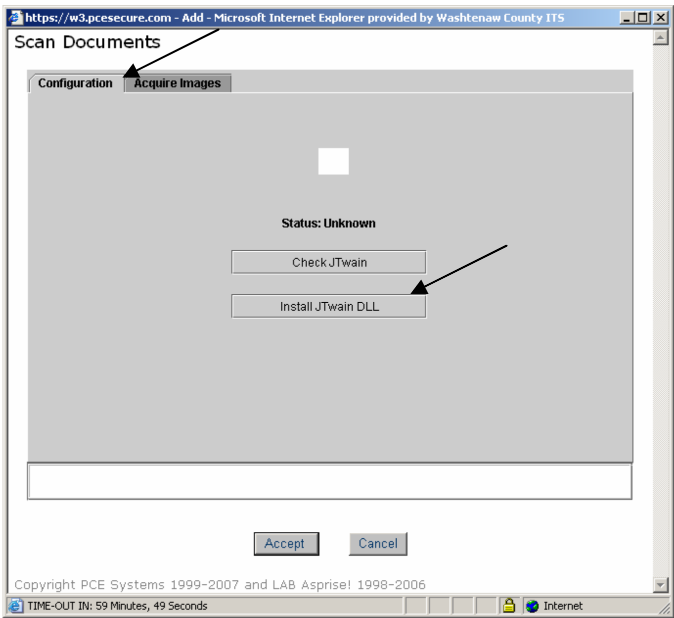
| | |
|---|---|
| **Severity** | If the incident has the potential to be a sentinel event, click the "Potential Sentinel Event" checkbox. If the issue doesn't appear to be sentinel, but is urgent or important, click the "Potential Critical Event" check box.<br><br>Checking these boxes will send additional e-mails to people who need to be alerted of these types of situations. |
| **Scan Documents** | Click the Scan link to scan the paper version of the Incident Report. For directions on scanning see "To Scan Incident Reports" on **page 9**. |
| **Notes** | Use this field to enter any information that you are unsure about on the original form. For example, "Couldn't read time incident happened at, but I think it said 9 a.m." |
| ✓Spell Check | Click this button to check your spelling. |
| SAVE | Click ***SAVE*** to save the Incident Report with a "Pending" status and finish it later.<br><br>**Note**: If you click ***SAVE***, the Incident Report is not completed. You must return to the report later to complete it. To do this, follow the instructions under "To Change Incident Reports" on **page 11**. |
| SAVE & SEND TO CSM | Click the ***SAVE & SEND TO CSM*** button to save the Incident Report and send it to CSM. Once you click this button, the Incident Report is sent to the consumer's case manager for review. |

### *To **Scan** Incident Reports:*

1. Follow steps 1-2 under "To Add Incident Reports" on **page 4**.
2. Click on the Scan link near the bottom of the Add Incident Report screen.



3. If a window pops up asking if you want to trust this applet or run this application, click the appropriate button to accept the application. The message and buttons available will depend on the computer you are using. Buttons labeled ***Yes, Always***, or ***Run***, will commonly appear for most users.
4. Check to see if there is a "Configuration" tab at the top left of the scanning window. If there is, you'll need someone with administrative rights to open this same window and click the ***Install JTwain DLL*** button.




5. If you need someone to install the JTwain DLL, close all browser windows and repeat steps 1-3. If you are in the middle of entering an Incident Report, return to it and click the ***SAVE*** button to save the form and set the status as "Pending."

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**Note:** If you continue to see the "Configuration" tab, the following steps will not work. Be sure to complete the above steps before moving forward.

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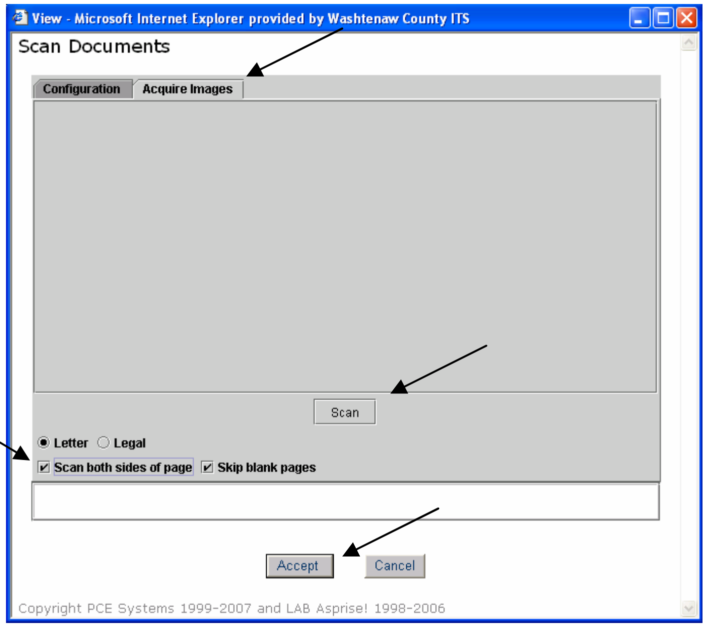
6. After installing the JTwain driver, or if there was no configuration tab, click on the "Acquire Images" tab.
7. Turn your scanner on, and put the Incident Report or document in the scanner bed.
8. Select the size of the paper. This option pre-fills on "Letter." If the form is on a legal size piece of paper, click on the "Legal" circle.
9. If you want to scan both sides of the document, and your scanner is capable of doing this, click on the box labeled "Scan both sides of a page." When that box is clicked you have the option of clicking on the "Skip blank pages" box so the scanner doesn't scan blank pages.




10. Click ***Scan.*** A preview of the scan will be displayed.
11. If you want to accept the scan click ***Accept***. To scan the document again, click ***ReScan*** as many times as necessary until you get an acceptable scan.
12. To stop scanning without saving the document, click ***Cancel.***

After you click ***Accept***, the scanner window will close. On the Add Incident Report screen, the number of pages you scanned into Encompass should be shown in the "Pages" field.


### *To **Change** Incident Reports:*

Only certain users can change a form. If you have access to this link use it to change Incident Reports before they have been sent out. The Change link is also used to finish pending Incident Reports.

1. Follow steps 1-3 under "To View Pending Incident Reports" on **page 2**.
2. Click on the Change link to the right of the report you want to change or send.

**1 Incident Reports** View Help

| Incident Details | Consumer(s) | Provider | Add Full IR<br>Add Scanned IR |
|---|---|---|---|
| **NUMBER**<br>1087<br>**DATE**<br>10/26/2007<br>**TIME**<br>9:00 AM<br>**STATUS**<br>Pending | John Doe | AAOG Ypsilanti | Change View<br>Clarification<br>Print IR<br>Fax IR |

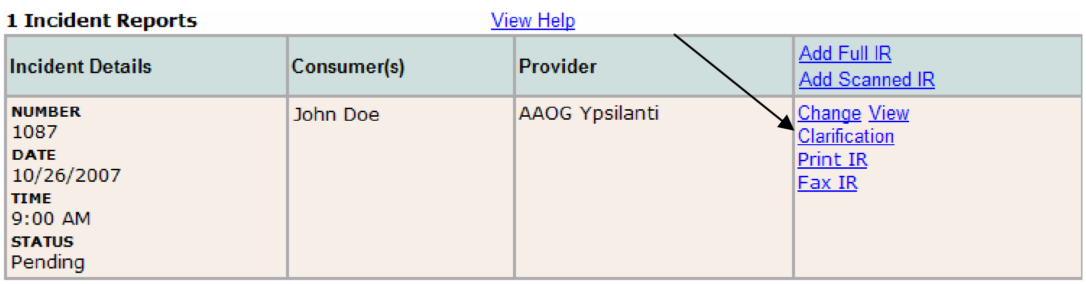
3. Make any necessary changes.

4. Click ***SAVE*** to save the report and not send it. To save and send the report, click ***SAVE & SEND to CSM*** or ***SAVE & SEND FOR SIGN-OFF***. The button that is available depends on whether you filled out a full or scanned version of an Incident Report.

### *To **Clarify** Incident Reports:*

The Clarification link is used to enter information that will clarify an incident. Don't use this link for anything else. Any Incident Report follow-ups should be added as a Progress Note—not as a clarification.

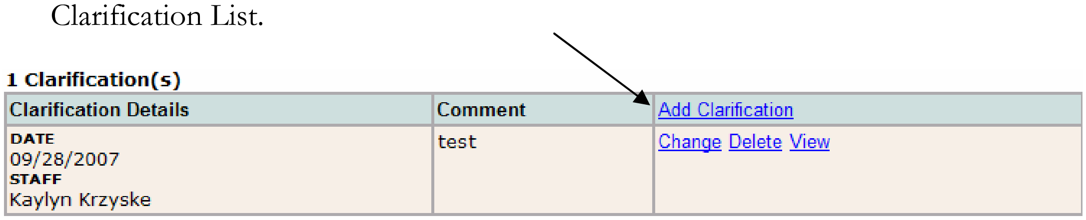
1. Follow steps 1-3 under "To View Pending Incident Reports" on **page 2**.
2. Click on the Clarification link to the right of the record that needs clarifying.



**1 Incident Reports** View Help

| Incident Details | Consumer(s) | Provider | Add Full IR<br>Add Scanned IR |
|---|---|---|---|
| NUMBER<br>1087<br>DATE<br>10/26/2007<br>TIME<br>9:00 AM<br>STATUS<br>Pending | John Doe | AAOG Ypsilanti | Change View<br>Clarification<br>Print IR<br>Fax IR |

3. Click on the Add Clarification link on the top of chart in the Incident Report Clarification List.



**1 Clarification(s)**

| Clarification Details | Comment | Add Clarification |
|---|---|---|
| DATE<br>09/28/2007<br>STAFF<br>Kaylyn Krzyske | test | Change Delete View |

4. Fill in the following information:

| Field/Section: | Instructions: |
|---|---|
| **Date** | Enter the date the clarification was added. Use the icon to select the date or click the Use Current Date link to enter today's date. |
| **Staff** | Your name will pre-fill. Use the **lookup** button to change the name, if needed. |
| **Comment** | Enter any comments needed to clarify the Incident Report. For example, "Incident Report did not mention the type of missed medication. Called home manager, and she said the missed medication was Haldol." |
| ✓Spell Check | Click this button to check your spelling. |

5. Click ***SAVE*** to save the clarification. Click ***CANCEL*** to cancel it.

*To **View** a Clarification:*

1. Follow steps 1-2 under "To Clarify Incident Reports" on **page 12**.
2. Click on the View link to the right of the clarification you want to view.

**1 Clarification(s)**

| Clarification Details | Comment | Add Clarification |
|---|---|---|
| **DATE**<br>09/28/2007<br>**STAFF**<br>Kaylyn Krzyske | test | Change Delete View |

*To **Change** a Clarification:*

Only administrators will have the ability to change a clarification, so not everyone will have access to this link.

1. Follow steps 1-2 under "To Clarify Incident Reports" on **page 12**.
2. Click on the Change link to the right of the clarification that needs changing.

**1 Clarification(s)**

| Clarification Details | Comment | Add Clarification |
|---|---|---|
| **DATE**<br>09/28/2007<br>**STAFF**<br>Kaylyn Krzyske | test | Change Delete View |

3. Make any necessary changes.
4. Click ***SAVE***.

## *To **Print** Incident Reports:*

1. Follow steps 1-3 under "To View Pending Incident Reports" on **page 2**.
2. Click on the Print IR link to the right of the record you want to print.

**1 Incident Reports** View Help

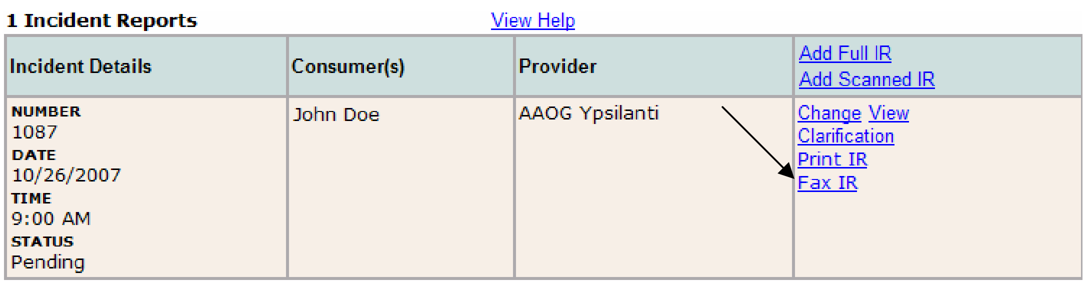
| Incident Details | Consumer(s) | Provider | Add Full IR<br>Add Scanned IR |
|---|---|---|---|
| **NUMBER**<br>1087<br>**DATE**<br>10/26/2007<br>**TIME**<br>9:00 AM<br>**STATUS**<br>Pending | John Doe | AAOG Ypsilanti | Change View<br>Clarification<br>Print IR<br>Fax IR |

3. A new Adobe Acrobat window will pop up. Click on the print icon in the upper-left corner of the screen.


### *To **Fax** Incident Reports:*

Incident Reports can be faxed to people who do not have access to Encompass. This feature allows the reports to be faxed without having to print them.

1. Follow steps 1-3 under "To View Pending Incident Reports" on **page 2**.
2. Click on the Fax IR link to the right of the report that needs to be faxed.



**1 Incident Reports** View Help

| Incident Details | Consumer(s) | Provider | Add Full IR<br>Add Scanned IR |
|---|---|---|---|
| NUMBER<br>1087<br>DATE<br>10/26/2007<br>TIME<br>9:00 AM<br>STATUS<br>Pending | John Doe | AAOG Ypsilanti | Change View<br>Clarification<br>Print IR<br>Fax IR |

3. Fill in the following information:

| Field/Section: | Instructions: |
|---|---|
| **Date** | Today's date will pre-fill. Change the date if it is incorrect. |
| **To** | Enter the name of the person you are sending the fax to. |
| **Company** | Enter the name of the company you are sending the fax to. |
| **Fax#** | Enter the number you are faxing the Incident Report to. |
| **Phone#** | Enter your phone number. |
| **From** | The current user's name will pre-fill. Change if incorrect. |
| **Notes** | Enter any notes the receiver of the fax might need. |

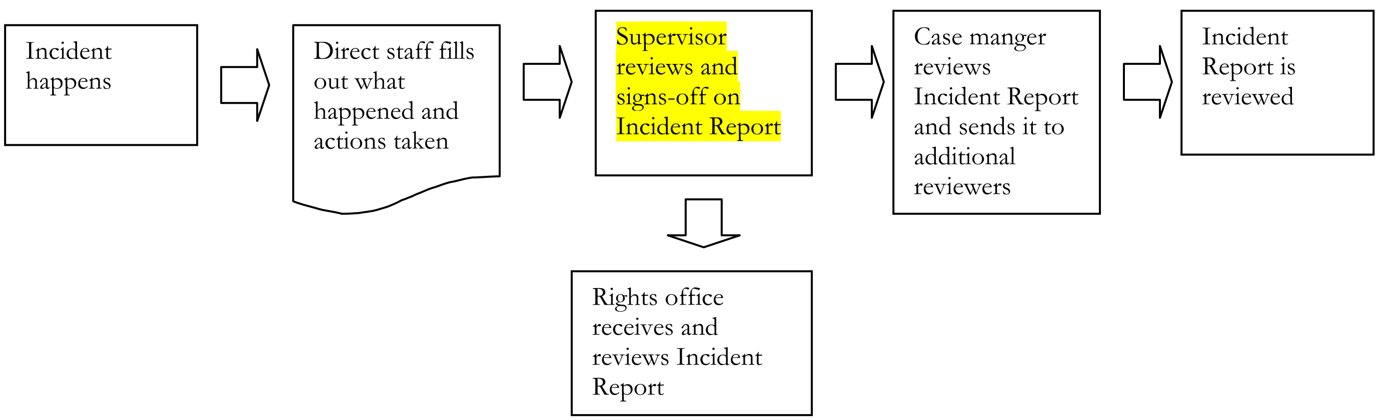
4. Click ***Send Fax.***

## Reviewing Incident Reports

### *How to Sign-Off on, Scan, Clarify, Print, and Fax, Incident Reports*

If someone sent you an Incident Report to review, use this part of Encompass to review it. You will be notified by e-mail that an Incident Report has been sent to you for review.

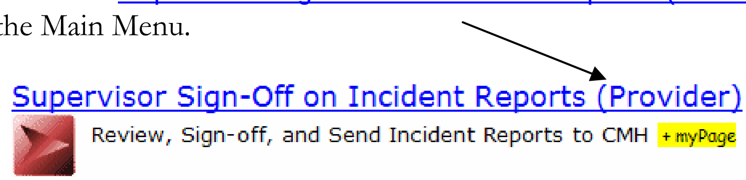
### *Overall IR Process (Highlighted areas are covered in this document)*




*To* ***Sign-Off*** *on Incident Reports:*
Provider supervisors have access to the Sign-Off link. After you sign-off on a report, it will be sent to the involved consumer's case manager.

1. Click on the **Peer Review Documents** link in the Main Menu.

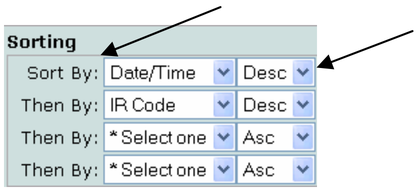

2. Click on the Supervisor Sign-Off on Incident Reports (Provider) link to the right of the Main Menu.



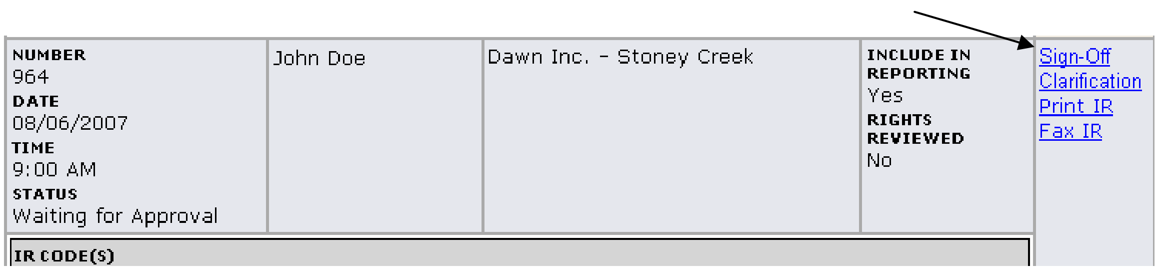

3. Search for Incident Reports by entering any of the following and clicking ***SEARCH***:
   a) Consumer
   b) Incident Number
   c) Incident Date

d) Incident Code
e) Potential Severity
f) Staff

To make the search results easier to navigate you can sort them. Use the drop-down menus in the "Sort By" field to select the primary criteria you want the Incident Reports to be displayed by and whether you want the results to be in ascending or descending order. Use the "Then By" fields to sort the results further.




4. Click on the Sign-Off link to the right of the record you need to sign-off on.




5. Fill in the following information:

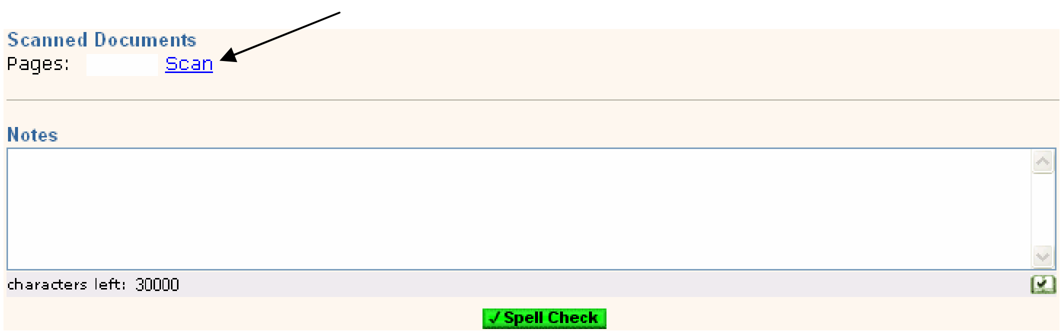
| Field/Section: | Instructions: |
|---|---|
| **Corrective Measures Taken to Remedy and/or Prevent Recurrence** | Explain any actions that have been made to prevent a similar occurrence from happening. |
| **Employee Assigned to Resident** | If an employee was assigned to watch over the consumer involved in the incident, use the lookup button to select the employee. |
| **Incident Reporting Code(s)** | Use the lookup button to select the code(s) that best describe the incident. A description of each code can be displayed by clicking on the More Info link. Make sure to select all codes that apply. |
| **Severity** | If the incident has the potential to be a sentinel event, click the "Potential Sentinel Event" checkbox. If the issue doesn't appear to be sentinel, but is urgent or important, click the "Potential Critical Event" check box.<br><br>Checking these boxes will send additional e-mails to people who need to be alerted of these types of situations. |

| | |
|---|---|
| **Type** | Select the person or agency that was notified about the incident from the drop-down menu. |
| **Name** | Enter the name of the person that was notified about the incident. |
| **Notification** | Enter the date and time the person was notified. Use the icon to select the date. |
| **Written Notice** | If a written notice was given, select the date and time the letter was sent to the person. Use the icon to select the date. |
| **Scanned Documents** | Click the Scan link to scan the paper version of the Incident Report. For directions on scanning see "To Scan Incident Reports" below. |
| **Notes** | Enter any additional information that isn't explained in the form. |
| ✓Spell Check | Click this button to check your spelling. |

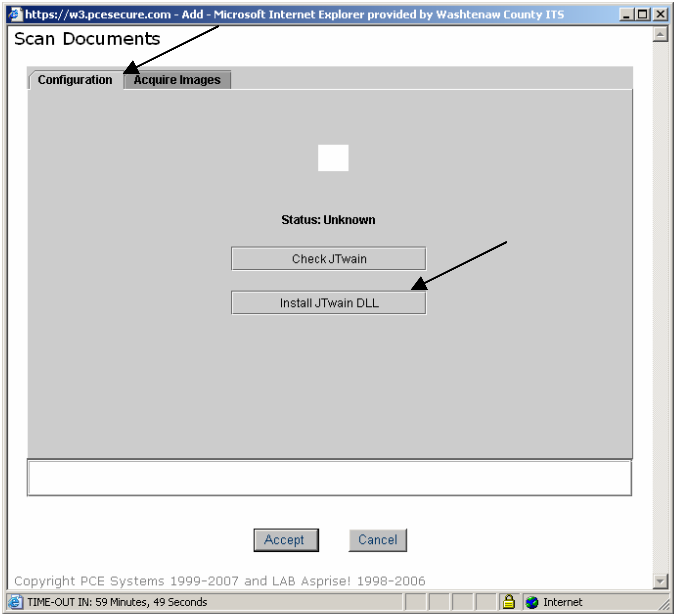
6. Click ***SAVE*** to save the record without signing it. To sign-off on the record, click ***SAVE & SEND TO CSM***.

### *To **Scan** Incident Reports:*

1. Follow steps 1-3 under "To Sign-Off on Incident Reports" on **page 15**.
2. Click on the Scan link near the bottom of the Change Incident Report screen.




3. If a window pops up asking if you want to trust this applet or run this application, click the appropriate button to accept the application. The message and buttons available will depend on the computer you are using. Buttons labeled ***Yes, Always***, or ***Run***, will commonly appear for most users.
4. Check to see if there is a "Configuration" tab at the top left of the scanning window. If there is, you'll need someone with administrative rights to open this same window and click the ***Install JTwain DLL*** button.




5. If you need someone to install the JTwain DLL, close all browser windows and repeat steps 1-3. If you are in the middle of entering an Incident Report, return to it and click the ***SAVE*** button to save the form and set the status as "Pending."

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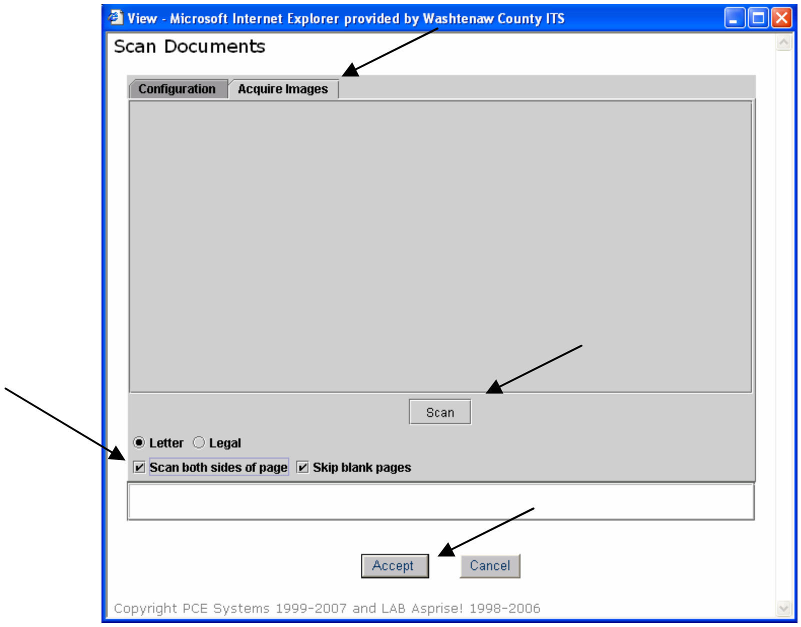
**Note:** If you continue to see the "Configuration" tab, the following steps will not work. Be sure to complete the above steps before moving forward.

---

6. After installing the JTwain driver, or if there was no configuration tab, click on the "Acquire Images" tab.
7. Turn your scanner on, and put the Incident Report or document in the scanner bed.
8. Select the size of the paper. This option pre-fills on "Letter." If the form is on a legal size piece of paper, click on the "Legal" circle.
9. If you want to scan both sides of the document, and your scanner is capable of doing this, click on the box labeled "Scan both sides of a page." When that box is clicked you have the option of clicking on the "Skip blank pages" box so the scanner doesn't scan blank pages.



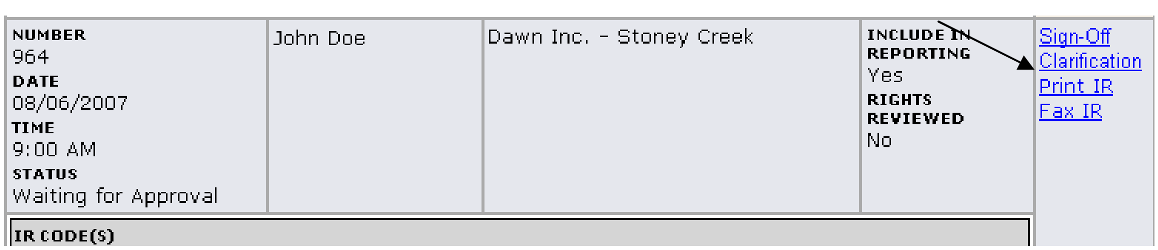

10. Click ***Scan.*** A preview of the scan will be displayed.
11. If you want to accept the scan click ***Accept***. To scan the document again, click ***ReScan*** as many times as necessary until you get an acceptable scan.
12. To stop scanning without saving the document, click ***Cancel.***

After you click ***Accept***, the scanner window will close. On the Change Incident Report screen, the number of pages you scanned into Encompass should be shown in the "Pages" field.


### *To **Clarify** Incident Reports:*

The Clarification link is used to enter information that will clarify an incident. Don't use this link for anything else. Any Incident Report follow-ups should be added as a Progress Note—not as a clarification.

1. Follow steps 1-3 under "To Sign-Off on Incident Reports" on **page 15**.
2. Click on the Clarification link to the right of the record that needs clarifying.



3. Click on the Add Clarification link on the top of chart in the Incident Report Clarification List.

**1 Clarification(s)**

| Clarification Details | Comment | Add Clarification |
|---|---|---|
| DATE<br>09/28/2007<br>STAFF<br>Kaylyn Krzyske | test | Change Delete View |

4. Fill in the following information:

| Field/Section: | Instructions: |
|---|---|
| **Date** | Enter the date the clarification was added. Use the icon to select the date or click the Use Current Date link to enter today's date. |
| **Staff** | Your name will pre-fill. Use the **lookup** button to change the name, if needed. |
| **Comment** | Enter any comments needed to clarify the Incident Report. For example, "Incident Report did not mention the type of missed medication. Called home manager, and she said the missed medication was Haldol." |
| **✓ Spell Check** | Click this button to check your spelling. |

5. Click ***SAVE*** to save the clarification. Click ***CANCEL*** to cancel it.

*To **View** a Clarification:*

1. Follow steps 1-2 under "To Clarify Incident Reports" on **page 19**.
2. Click on the View link to the right of the clarification you want to view.

**1 Clarification(s)**

| Clarification Details | Comment | Add Clarification |
|---|---|---|
| DATE<br>09/28/2007<br>STAFF<br>Kaylyn Krzyske | test | Change Delete View |

*To **Change** a Clarification:*

Only administrators can change clarifications, so not everyone will have access to this link.

1. Follow steps 1-2 under "To Clarify Incident Reports" on **page 19**.
2. Click on the Change link to the right of the clarification that needs changing.

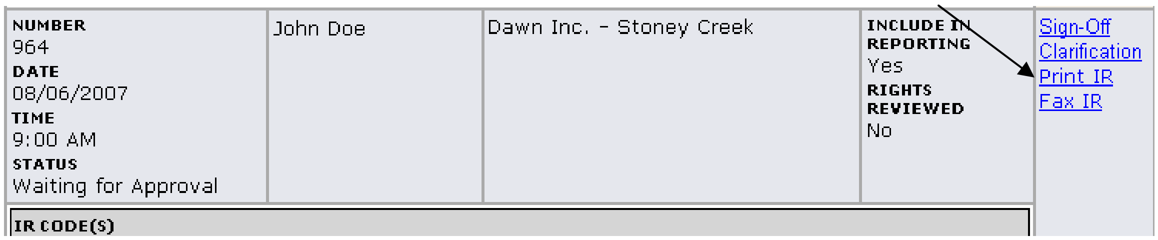
**1 Clarification(s)**

| Clarification Details | Comment | Add Clarification |
|---|---|---|
| DATE<br>09/28/2007<br>STAFF<br>Kaylyn Krzyske | test | Change Delete View |

3. Make any necessary changes.
4. Click ***SAVE***.

### *To **Print** Incident Reports:*

1. Follow steps 1-3 under "To Sign-Off on Incident Reports" on **page 15**.
2. Click on the Print IR link to the right of the record you want to print.

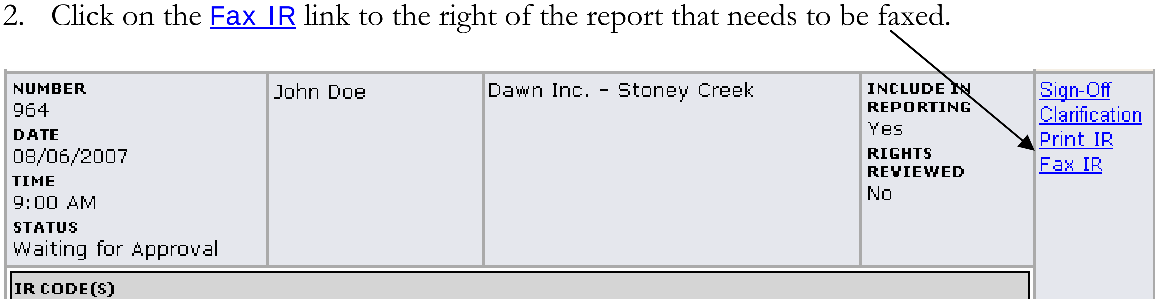



3. A new Adobe Acrobat window will pop up. Click on the print icon in the upper-left corner of the screen.


### *To **Fax** Incident Reports:*

Incident Reports can be faxed to people who do not have access to Encompass. This feature allows the reports to be faxed without having to print them.

1. Follow the steps 1-3 under "To Sign-Off on Incident Reports" on **page 15**.
2. Click on the Fax IR link to the right of the report that needs to be faxed.



3. Fill in the following information:

| Field/Section: | Instructions: |
|---|---|
| **Date** | Today's date will pre-fill. Change the date if it is incorrect. |
| **To** | Enter the name of the person you are sending the fax to. |
| **Company** | Enter the name of the company you are sending the fax to. |
| **Fax#** | Enter the number you are faxing the Incident Report to. |
| **Phone#** | Enter your phone number. |
| **From** | The current user's name will pre-fill. Change if incorrect. |
| **Notes** | Enter any notes the receiver of the fax might need. |

4. Click ***Send Fax.***

The window will close automatically once the fax is sent.

## Historical Incident Reports

### *How to View, Change, Clarify, Print, and Fax Historical Incident Reports*

Since the Incident Reports are being passed to different people's queues it can be difficult to find a certain report. This link is used to find any Incident Report in the system.

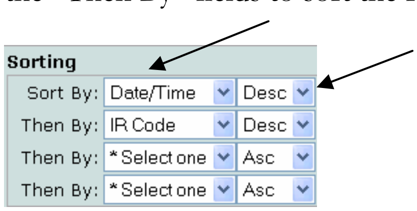
*To **View** Incident Reports:*

1. Click on the **Peer Review Documents** link in the Main Menu.


2. Click on the View Historical Incident Reports (Provider) link to the right of the Main Menu.


3. Search for Incident Reports by entering any of the following and clicking ***SEARCH***:
   a) Consumer
   b) Incident Number
   c) Incident Date
   d) Include Unknown Dates
   e) Incident Code
   f) Incident Status
   g) Potential Severity
   h) Staff

To make the search results easier to navigate, you can sort them. Use the drop-down menus in the "Sort By" field to select the primary criteria you want the Incident Reports to be displayed by and whether you want the results to be in ascending or descending order. Use the "Then By" fields to sort the results further.




4. Click on the View link to the right of the record you want to view.

| | | | | |
|---|---|---|---|---|
| **NUMBER**<br>1095<br>**DATE**<br>11/05/2007<br>**TIME**<br>Unknown<br>**STATUS**<br>Pending | | Renaissance Community Homes | **INCLUDE IN REPORTING**<br>Yes<br>**RIGHTS REVIEWED**<br>No | Change View<br>Clarification<br>Print IR<br>Fax IR |
| **IR CODE(S)** | | | | |

### *To **Change** Incident Reports:*

If the Incident Report hasn't been sent yet, it can be changed from this history link. You can also use this link to send the Incident Report.

1. Follow steps 1-3 under "To View Incident Reports" on **page 23**.
2. Click on the Change link to the right of the report you want to change or send.
3. Make any necessary changes.

| | | | | |
|---|---|---|---|---|
| **NUMBER**<br>1095<br>**DATE**<br>11/05/2007<br>**TIME**<br>Unknown<br>**STATUS**<br>Pending | | Renaissance Community Homes | **INCLUDE IN REPORTING**<br>Yes<br>**RIGHTS REVIEWED**<br>No | Change View<br>Clarification<br>Print IR<br>Fax IR |
| **IR CODE(S)** | | | | |

4. Click ***SAVE*** to save the report and not send it. To save and send the report, click ***SAVE & SEND to CSM*** or ***SAVE & SEND FOR SIGN-OFF***. The button that is available depends on whether you filled out a full or scanned version of an Incident Report.

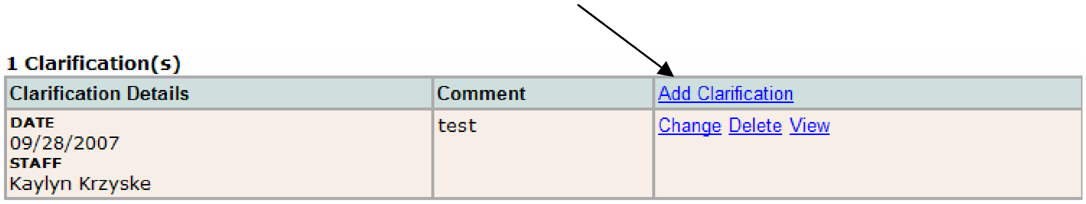
### *To **Clarify** Incident Reports:*

The Clarification link is used to enter information that will clarify an incident. Don't use this link for anything else. Any Incident Report follow-ups should be added as a Progress Note—not as a clarification.

1. Follow steps 1-3 under "To View Incident Reports" on **page 23**.
2. Click on the Clarification link to the right of the record that needs clarifying.

| | | | | |
|---|---|---|---|---|
| **NUMBER**<br>1095<br>**DATE**<br>11/05/2007<br>**TIME**<br>Unknown<br>**STATUS**<br>Pending | | Renaissance Community Homes | **INCLUDE IN REPORTING**<br>Yes<br>**RIGHTS REVIEWED**<br>No | Change View<br>Clarification<br>Print IR<br>Fax IR |
| **IR CODE(S)** | | | | |

3. Click on the Add Clarification link on the top of chart in the Incident Report Clarification List.



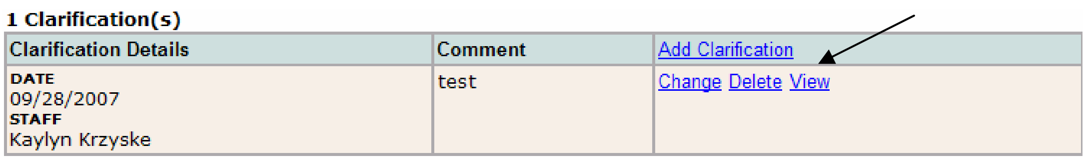

4. Fill in the following information:

| Field/Section: | Instructions: |
|---|---|
| **Date** | Enter the date the clarification was added. Use the icon to select the date or click the Use Current Date link to enter today's date. |
| **Staff** | Your name will pre-fill. Use the **lookup** button to change the name, if needed. |
| **Comment** | Enter any comments needed to clarify the Incident Report. For example, "Incident Report did not mention the type of missed medication. Called home manager, and she said the missed medication was Haldol." |
| ✓ Spell Check | Click this button to check your spelling. |

5. Click ***SAVE*** to save the clarification. Click ***CANCEL*** to cancel it.

*To **View** a Clarification:*

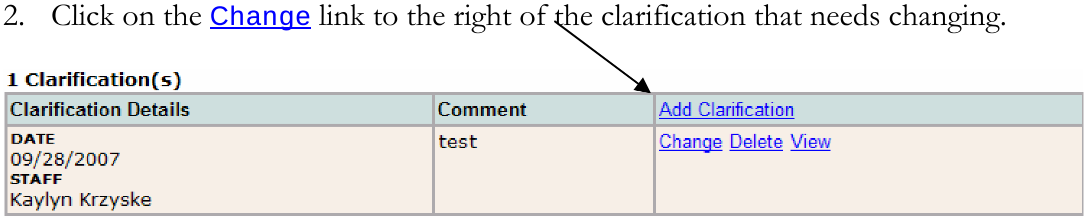
1. Follow steps 1-2 under "To Clarify Incident Reports" on **page 24**.
2. Click on the View link to the right of the clarification you want to view.




*To **Change** a Clarification:*

Only administrators will have the ability to change a clarification, so not everyone will have access to this link.

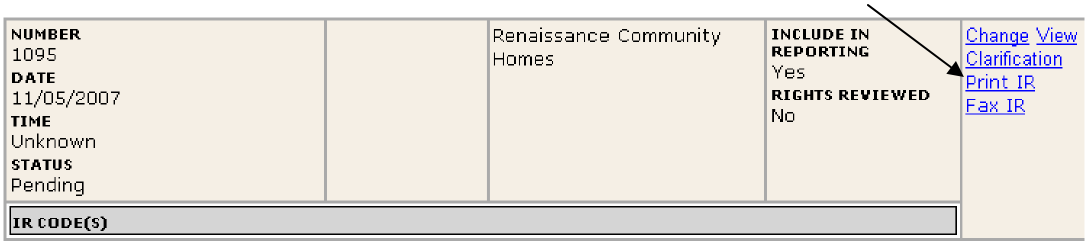
1. Follow steps 1-2 under "To Clarify Incident Reports" on **page 24**.
2. Click on the Change link to the right of the clarification that needs changing.



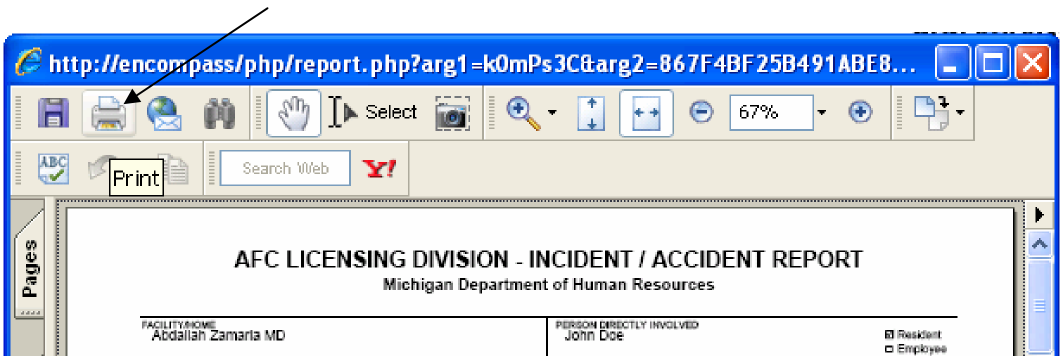

3. Make any necessary changes.
4. Click ***SAVE***.

## *To **Print** Incident Reports:*

1. Follow steps 1-3 under "To View Incident Reports" on **page 23**.
2. Click on the Print IR link to the right of the record you want to print.



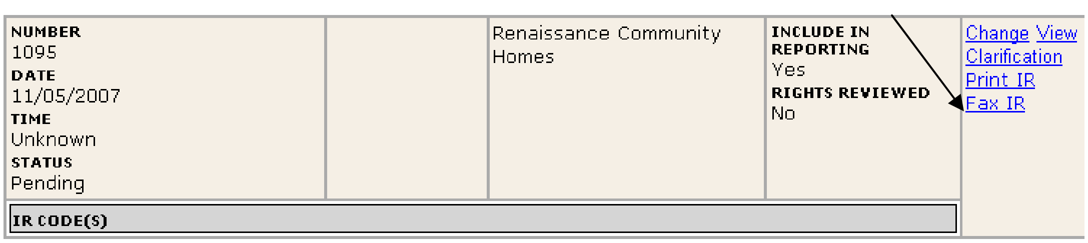

3. A new Adobe Acrobat window will pop up. Click on the print icon in the upper-left corner of the screen.




## *To **Fax** Incident Reports:*

Incident Reports can be faxed to people who do not have access to Encompass. This feature allows the reports to be faxed without having to print them.

1. Follow steps 1-3 under "To View Incident Reports" on **page 23**.
2. Click on the Fax IR link to the right of the report that needs to be faxed.




3. Fill in the following information:

| Field/Section: | Instructions: |
|---|---|
| **Date** | Today's date will pre-fill. Change the date if it is incorrect. |
| **To** | Enter the name of the person you are sending the fax to. |

| | |
|---|---|
| **Company** | Enter the name of the company you are sending the fax to. |
| **Fax#** | Enter the number you are faxing the Incident Report to. |
| **Phone#** | Enter your phone number. |
| **From** | The current user's name will pre-fill. Change if incorrect. |
| **Notes** | Enter any notes the receiver of the fax might need. |

4. Click ***Send Fax.***

The window will close automatically once the fax is sent.