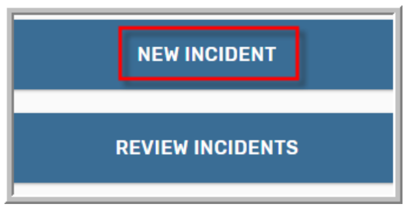
Anywhere Incident Tracking

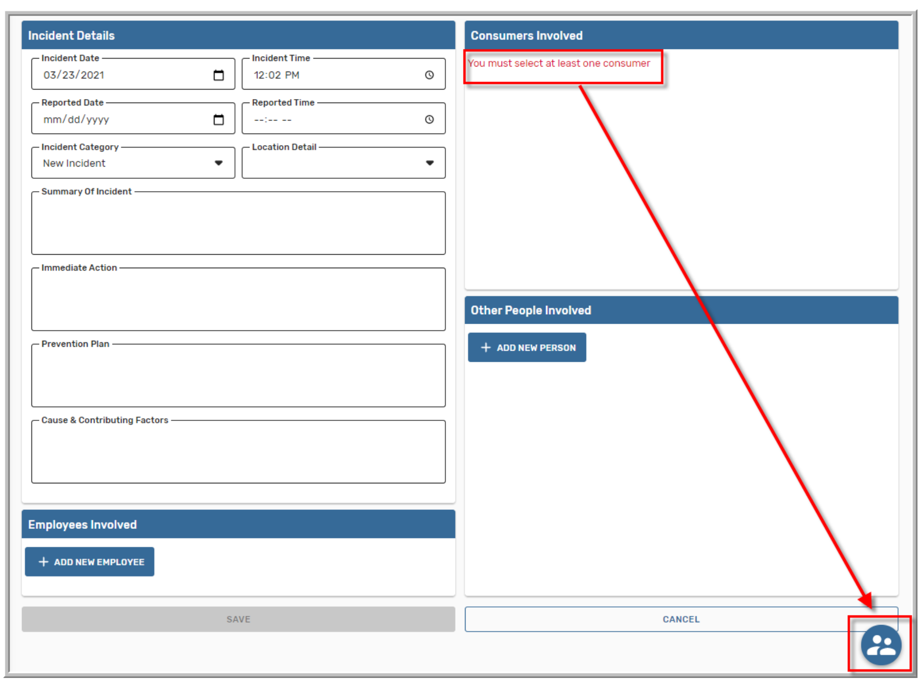
Navigating the Incident Tracking Module

To open the module, select the Incident Tracking on the Dashboard.

- Select New Incident



- Next, select a consumer(s) by selecting the People icon, or Mini Roster, at the bottom of the page.



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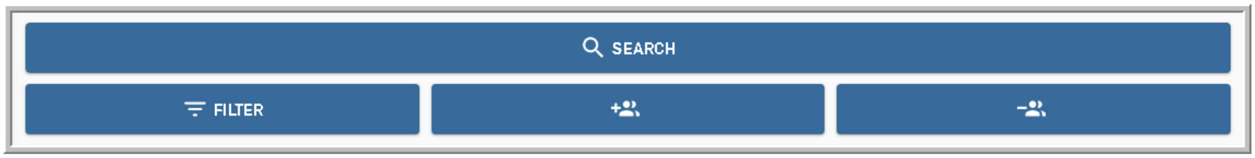
There are several filtering options that will display in this window. These filtering methods allow users to select the consumers in which they need to document an incident report. If default settings have been assigned for a specific Roster location or Roster group, the consumers assigned will appear in the incident tracking window.



- **<u>Search:</u>** Allows you to search for consumers by first name, middle name, or last name.
- **<u>Filter:</u>** Allows you to search for consumers by Date, Location, and Group(s). You can use one filter or combination of these filters to narrow your search for consumers.
- The **<u>People icon with the plus</u>**  selects all consumer cards at one time. All cards will become higlighted and all consumer names will appear on the case note.
- The **<u>People icon with the minus</u>**  de-selects all consumer cards. The highlighting will disappear.

Select consumer card(s) by using a method above or by individually selecting a consumer card. As cards are selected, the name(s) will become higlighted. Select Done.

- A blank incident report will display with the selected consumer(s) names in the Consumers Involved section.

<u>Creating an Incident Report</u>

The Incident Tracking module contains four sections. These sections are: Consumers Involved, Incident Details, Employees Involved, and Other People Involved. Each section is reviewed below.

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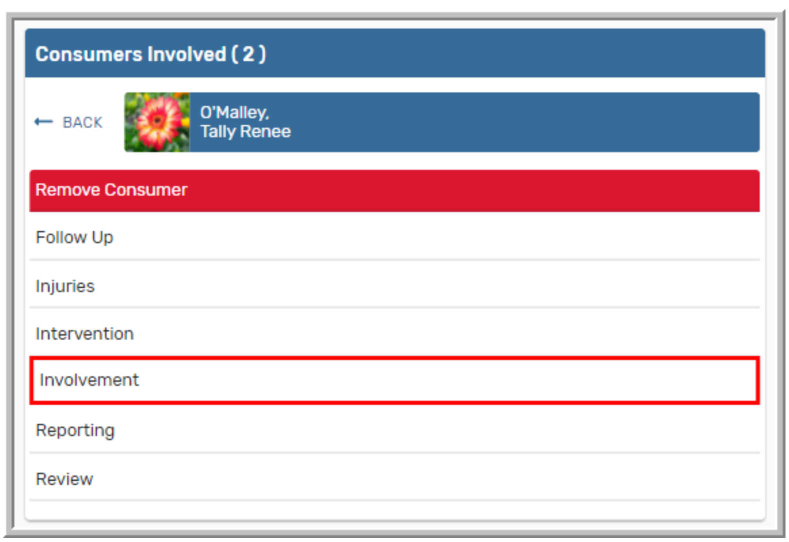
Consumers Involved

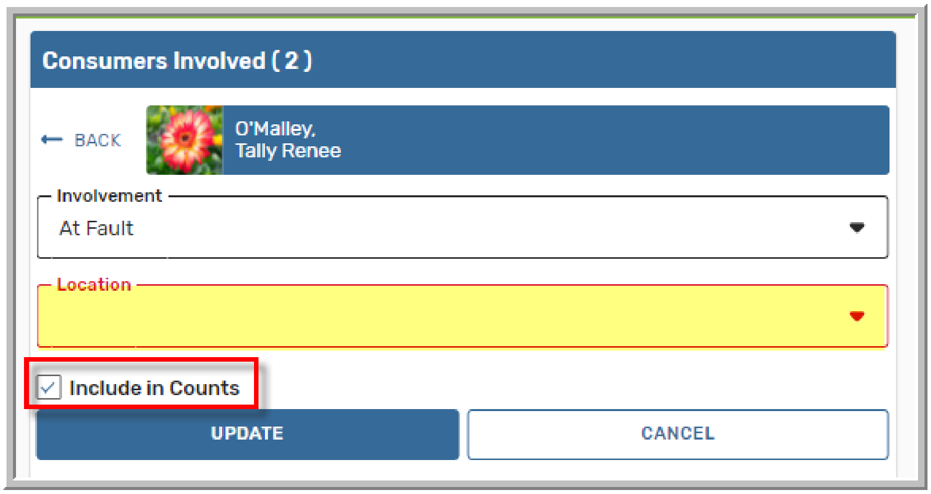
The consumer cards will allow users to capture incident details for each consumer assigned to the incident report. As incident reports are created, it is important to remember that all required fields in each section are highlighted in RED.

- The Consumer card is highlighted in RED. This is because incident reports require a location to be assigned to each consumer. In order to enable the save button, which will allow the user to save the incident report at any time, it is recommended that the location is assigned to each consumer before any other detail is captured for the incident report.

- To assign a location, select the consumer card.
  - Once selected, a menu list of options will display to capture incident details for the consumer.



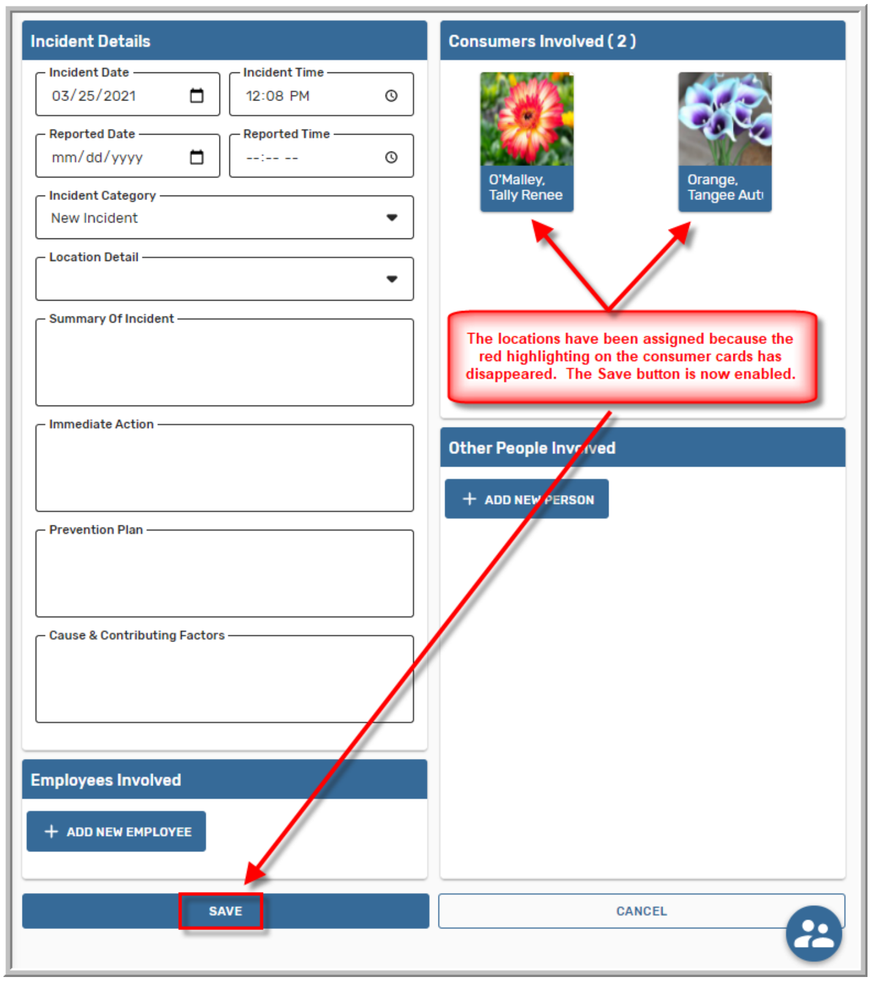
- The Involvement tab is highlighted in RED because this is where the location is assigned.
    - The "Include In Counts" check box on the Involvement tab is required on at least one consumer per incident report.



    - If the individual has one location assigned, the program will default the location.
        - If more than one location has been assigned, the user will use the drop down list to assign the location.

- The Involvement Type can be inserted by using the drop down arrows to select from available options.
    - Once all fields have been inserted, select the Update button.
    - The entry will be saved and the user will return to the menu list items.
    - Select the back button to return to the Consumers Involved section.
- The consumer card is no longer highlighted in red and the save button is now enabled on the incident report.

- If there is more than one consumer assigned on the incident report, repeat the previous steps to meet the required fields and enable the save button.
- Once the steps are completed and the highlighting on the consumer card disappears, users may now save their work at any time during the creation of the incident report.



- Additional Consumers can be added to an incident report by selecting the Mini Roster, or people icon at the bottom of the page.
  - Select the consumer name and select done. The consumer will be added to Consumer Involved section.
    - The Consumer name will be highlighted in RED. Use the previously reviewed steps for assigning a location on the Involvement tab.
  - To remove a Consumer from an Incident, select the consumer card. The menu list will display.

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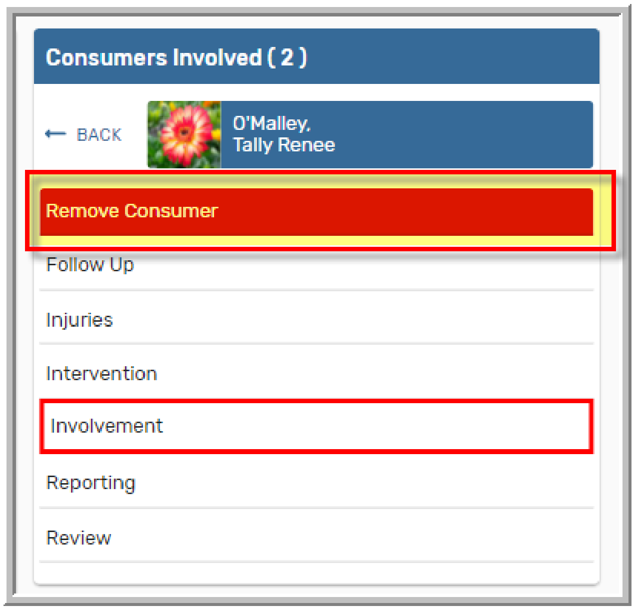
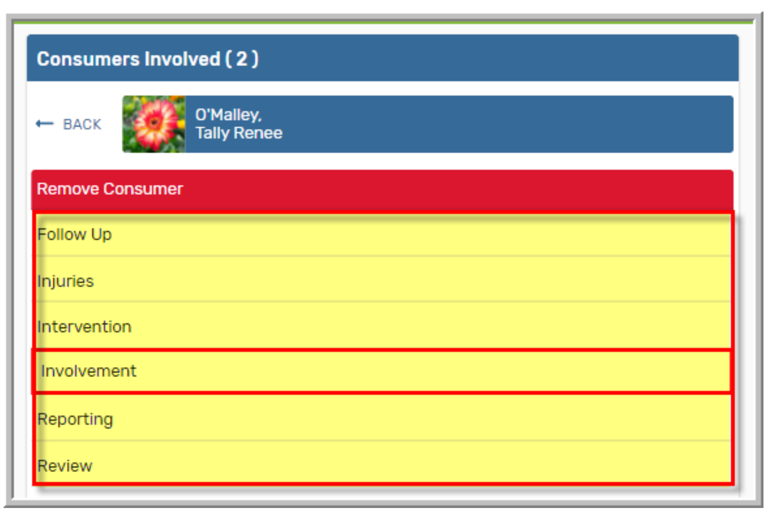


- Select the Remove Consumer button and the consumer card will disappear from the incident report.

Capturing Incident Details

To capture additional information for each consumer on the incident report, select the consumer card. The consumer card will display fields to capture the following information: Follow Up, Injuries, Intervention, Involvement, Reporting, and Review. There is also an option to Remove the Consumer from the incident report.



Follow Up

When selected, the user can select the "Add New Follow Up" button and the user can identify the Follow up type provided. It will also allow users to identify the person responsible for follow up, assign Due dates and completed dates. Required fields are highlighted in red.

- The note field allows users to capture details of the follow up strategies.
- Once all entries are completed, select Done.
  - If cancel is selected, users will return to the Follow up screen.
  - Users can select the Back arrow at any time to return to the Consumers Involved screen.
- Once an entry is saved, the Follow Up grid will display the Follow Up Type, Person Responsible, and Due Date details.
  - If a user needs to delete an entry, select the line item entry and the detail of the follow up will be displayed. Select the red Delete button. When selected, the program will ask verify if you want to delete the entry. When yes is selected, the entry will be permanently deleted.
  - If cancel is selected, users will return to the Follow Up screen.

Injuries

When selected, the user can select the "Add New Injury" button and the user can identify the Injury Location and Injury Type. It will also allow users to identify if the consumer was Checked By a Nurse. Required fields are highlighted in RED.

- The Details and Treatment text boxes allow users to capture information about the injury.
- User can also identify the date for when the consumer was checked by the nurse.
- Once all entries are completed, select Done.
  - If cancel is selected, users will return to the Injury screen. Users can select the Back arrow at any time to return to the Consumers Involved screen.
- Once an entry is saved, an Injury grid will display the Injury Location, Injury Type, and Checked By Nurse details.
- If a user needs to delete an entry, select the line item entry and the detail of the injury will be displayed. Select the red Delete button.
  - When selected, the program will ask verify if you want to delete the entry. When yes is selected, the entry will be permanently deleted.
  - If cancel is selected, users will return to the Injury screen.

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Interventions

When selected, the user can select the “Add New Intervention” button and the user can identify the Intervention Type. Required fields are highlighted in RED.

- It will also allow users to identify start time, end time, and total time associated with the intervention.
- The incident can be identified as Aversive by placing a check mark in the aversive box. There is a notes field to capture detail for the aversive intervention.
- Once all entries are completed, select Done.
    - If cancel is selected, users will return to the Intervention screen. Users can select the Back arrow at any time to return to the Consumers Involved screen.
- Once an entry is saved, an Intervention grid will display the Intervention Type, Time Length, and Aversive details.
- If a user needs to delete an entry, select the line item entry and the detail of the follow up will be displayed. Select the RED Delete button.
    - When selected, the program will ask verify if you want to delete the entry. When yes is selected, the entry will be permanently deleted.
    - If cancel is selected, users will return to the Intervention screen.

Involvement

When selected, the user can insert the “Involvement Type” and Location for the incident. A location must be assigned for each consumer on the incident report.

- Users can assign the Include In Counts status on this tab by placing a check mark in the Include In Counts box.
    - At least one consumer must be identified with the Include in Counts status per incident report.
- If cancel is selected, users will return to the Involvement screen.

Reporting

When selected, the user can select the “Add New Reporting” button and the user can identify the Reporting Category, Reported By, Reported To, and Report method. Required fields are highlighted in RED.

- The Date Reported and Reported Time can be captured.
- The Notes field allows users to capture details of the reporting process.
    - If cancel is selected, users will return to the Reporting screen.

- Once an entry is saved, a Reporting grid will display the Reporting Category, Date Reported, and Reported By details.
- If a user needs to delete an entry, select the line item entry and the detail of the follow up will be displayed. Select the red Delete button.
  - When selected, the program will ask verify if you want to delete the entry. When yes is selected, the entry will be permanently deleted.
- If cancel is selected, users will return to the Reporting screen.

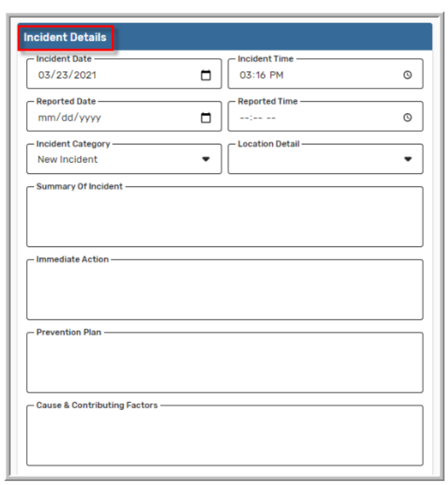
Review

When selected, the user can select the "Add New Review" button and the user can identify the Review Date and Reviewed By fields. Required fields are highlighted in RED.

- The Notes field allows users to capture details of the review process.
  - If cancel is selected, users will return to the Review screen.
- Once an entry is saved, a Review grid will display the Reviewed By and Date Reviewed details.
- If a user needs to delete an entry, select the line item entry and the detail of the follow up will be displayed. Select the red Delete button.
  - When selected, the program will ask verify if you want to delete the entry. When yes is selected, the entry will be permanently deleted.
  - If cancel is selected, users will return to the Review screen.

Incident Details

- The Incident Date and Time will always default to the current date/time.

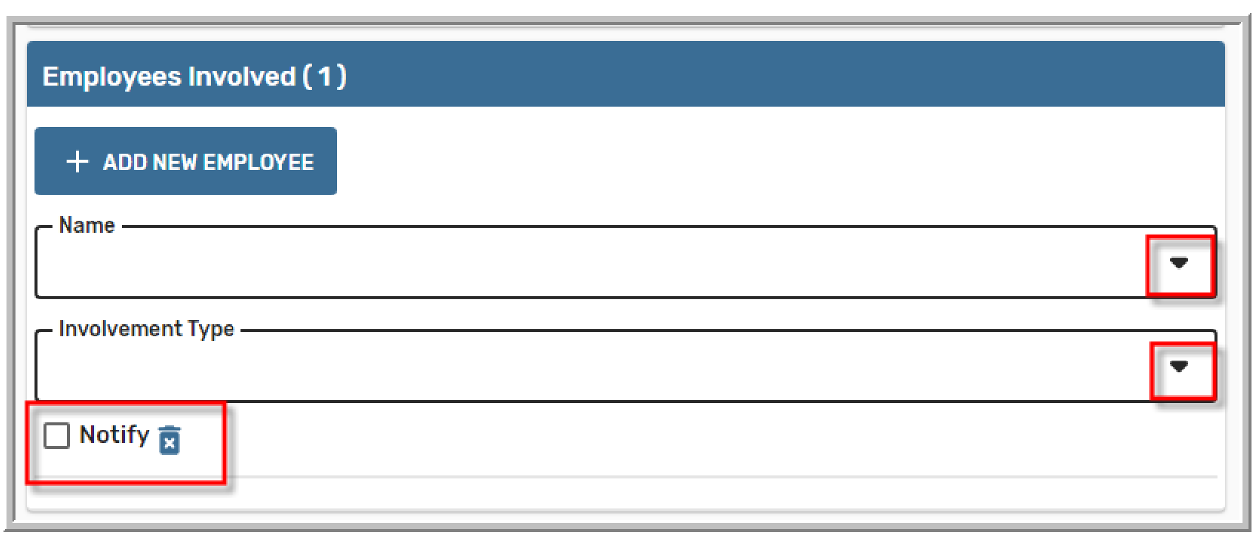


- The Reported Date can be inserted manually or by using the up and down arrows.
- The Incident Category defaults to 'New Incident" and the drop down list can be used to define the category, if desired.
- The Location Detail will display options that have been defined in the Advisor setup.
- The Summary of Incident, Immediate Action, Prevention Plan, and Cause and Contributing Factors are text fields. _These text fields will expand as entries are inserted.
    - There are no character limits in these fields.
- Once saved, the original Summary of Incident is "locked down" and cannot be revised. Additional information can be added to the original Summary of Incident. However, once saved, this information is also "locked down" and cannot be revised in the Anywhere website.
    - Revisions must be made in the Advisor application.

Employees Involved

- To insert an Employee, Select the Add New Employee button.

- Use the drop down arrows to Insert Name, Involvement Type, and Notify fields.

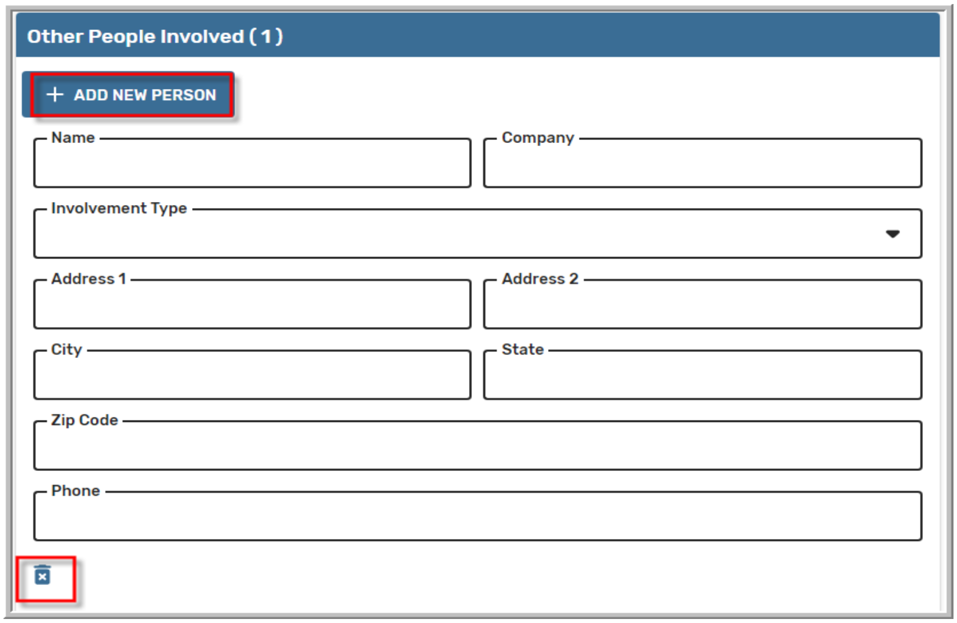


- The user can insert multiple entries by selecting the Add New Employee button to create additional entries.
- When the Notify check box is checked, the employee will receive an email or text message that the incident report was created.
    - To notify employees by text or email, the phone number or email must be captured on the Advisor- Edit Employee tab. If both items are captured on the employee tab, the employee will be notified by both methods.
    - Please note, an employee will not be notified if indicated on the incident report with an Involvement Type that does not allow for notifications.
        - For example, if the agency has assigned the set up for an Involvement Type of “At Fault” with a Hide from Employee status, the employee **will not** be notified the incident report was created or any updates created on the incident report.
- If the feature to “Automatically Notify Supervisors” option is assigned in the Advisor System Preferences- Incident Tacking tab, the user **does not** need to assign a supervisor on the incident report.
    - The supervisor will be notified of all incident reports created by the employees they directly supervise.
    - Supervisors will also see all incident reports for any location in which they have been assigned as a location supervisor.
        - The supervisor will not be notified if the supervisor is indicated on the incident report with an Involvement Type that does not allow for notifications.
        - For example, if your agency has assigned the set up for an Involvement Type of At Fault with a Hide from Employee status, the supervisor will not be notified the incident report was created or any updates created on the incident report.

Other People Involved

To insert Other People Involved, select Add New Person button.

- When selected, blank demographic fields will be displayed.

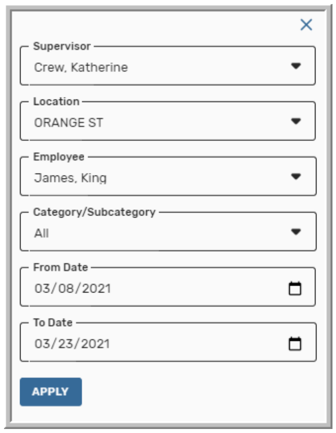


- The user can insert multiple entries by selecting the Add New Person button to create additional entries.
- The Trash Can will allow users to delete a line entry. Please note, this will only delete entries within the Other People Involved section.
- Once all requirements have been met, the Save button appears. To capture all information, the user must select Save to save all data inserted on the Incident Report.
    - If Cancel is selected, the program will take the user back to the Review Page without saving any changes.

Reviewing an Incident Report

The review page will display a filter and any incident reports that have been created within the designated time period that have been assigned in the Anywhere defaults.

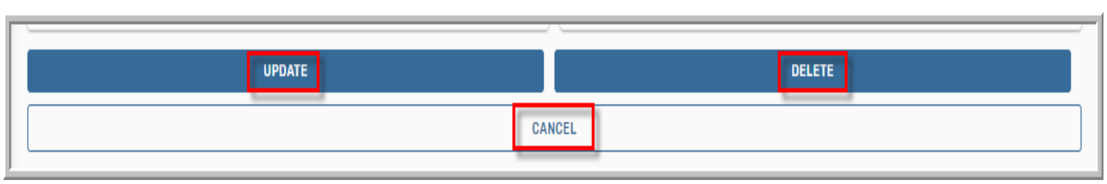
When the filter is selected, the user can use drop downs to designate Supervisor, Location, Employees, and Category/Subcategories.



- If the user is a supervisor, the list will display employees that are assigned to the supervisor AND those who are supervised by the user that is logged into Anywhere. This information is assigned in the Advisor Edit Employee window.
- If the user is NOT a supervisor, the user will only see their name in the dropdown. The Locations filter will match the list of Locations in the Roster.

In order to view, edit, or delete an existing Incident Report, select anywhere on the incident detail line. The incident report will be displayed.

- The Summary of Incident, Immediate Action, and Cause & Contributing Factors fields will stay expanded so users can easily review details of the incident report.
- Users may insert additional information in any of the incident fields.
- Please remember, once the Incident Report has been saved, the Summary of Incident cannot be revised.
    - If users try to change the original entry, the program will display a message stating no revisions can be made to an existing entry.
    - Users can add additional information to the Summary. However, once the report is saved, this information is "locked down" and cannot be revised.
    - Any revisions to the Summary must be completed in Advisor.
- To save all revisions, the user must select the "Update" button at the bottom of the page.



- If delete is selected, a prompt will be displayed to ask the user to confirm whether to delete the record.
- If the user selects Cancel, the program will take the user back to the Review Page and the revisions will not be saved.