

# The Incidents Module:

This Will Go On Your Permanent Record!

Professor Sara Tunick, Implementation Consultant



SHARE YOUR LEARNINGS:

[f @fooholdtechnology](#)  
[t @fooholdtech](#)

**#AWARDSU2018**

# Session Overview

- What Constitutes Good Data Entry
- Understand the Incidents Workflow
- Understand Permissions & Privileges
- Reporting & Outcomes



SHARE YOUR LEARNINGS:

 @fooholdtechnology

 @fooholdtech

**#AWARDSU2018**

# Good Data Entry

- Who?
  - Permission/Privilege Setting
- What?
  - Priority Information, Level of Detail
- When?
  - Establish Workflow, Roll Out Plan
- Where?
  - Configuration
- Why?
  - Legal, Clinical, Internal Policy, Outcome Tracking
- How?
  - Workflow, Training

“Garbage In, Garbage Out”



SHARE YOUR LEARNINGS:  
f @fooholdtechnology  
t @fooholdtech

#AWARDSU2018

## General Permissions

### Phase 1

- Program Chart Access
- Display Any Chart Records Button
- Display Incidents Button

### Phase 2

- Incident Review Data Entry

### Phase 3

- Unlock Incidents Report
- Delete Incidents Report

## Director & Deputy Director Privileges

- See full content of all reports for their assigned program(s)
- Edit report content even if they did not initiate it
- View comments written by others
- Lock reports they didn't initiate
- View forms even after the incident has been locked
- Cannot add comments to reports
- Cannot review (Phase 2) unless they also have the Incident Review Data Entry



SHARE YOUR LEARNINGS:

- [@foholdtechnology](#)
- [@foholdtech](#)

**#AWARDSU2018**

WHAT   WHO	PROGRAM DIRECTOR / DEPUTY DIRECTOR(S) *	USERS W/"INCIDENT REVIEW DATA ENTRY" PERMISSION	USER WHO ORIGINALLY ENTERED THE INITIAL REPORT	OTHER USERS
View the Initial Report	YES	YES	YES	NO (only some pieces) **
Edit the Initial Report	YES (prior to filing)	NO	YES (prior to filing)	NO
Add a Comment to the Initial Report	NO	YES (prior to filing)	NO	YES (prior to filing)
View Comments Added by Others	YES	YES	NO	NO (except for their own)
View the Incident Review	NO	YES	NO	NO
Edit the Incident Review	NO	YES (prior to closure)	NO	NO

\*Users may fall into more than one “Who” category.

\*\*Other Users: Those who do not fall into any other category in the table, but have access to the Incidents Module for that program. They can see:

- Incident ID
- Date
- Participants
- Location



SHARE YOUR LEARNINGS:

- 📍 @fooholdtechnology
- 📍 @fooholdtech

#AWARDSU2018

# Phase 1: Creating The Initial Report

## Permissions:

- Access to program and Incidents Module

## Notifications:

- Directors & Deputy Director(s)
- Anyone with the Incident Review Data Entry Permission



SHARE YOUR LEARNINGS:

- @fooholdtechnology
- @fooholdtech

#AWARDSU2018

# Phase 1.5: Updating & Commenting On The Report

## Permissions:

- To Update Report:
  - Initial Reporter
  - Directors & Deputy Director(s)
- To Comment:
  - Anyone with the Incident Review Data Entry Permission
  - Other Users

## Notifications:

- Director and Deputy Director(s)



SHARE YOUR LEARNINGS:



**#AWARDSU2018**

# Locking & Filing The Report

## Permissions:

- Initial Reporter
- Directors & Deputy Director(s)

## Notifications:

- Directors & Deputy Director(s)
- Anyone with the Incident Review Data Entry Permission



SHARE YOUR LEARNINGS:

- [@footholdtechnology](#)
- [@footholdtech](#)

**#AWARDSU2018**



# Phase 2: Reviewing & Closing the Report

## Permissions:

- Incident Review Data Entry Permission

## Notifications:

- None



SHARE YOUR LEARNINGS:

 @foholdtechnology

 @foholdtech

**#AWARDSU2018**

# Incident Reports

- Who is the intended audience?
- Incident Report
  - Displays unlocked/filed reports by default
  - Shows locked/filed reports for those with the Incident Review Data Entry Permission
  - Aggregate Report: Need the Incident Review Data Entry Permission
- Incidents ReportBuilder
  - What users can view is based on their role/Permissions/Privileges



SHARE YOUR LEARNINGS:

 @fooholdtechnology  
 @fooholdtech

**#AWARDSU2018**

# Q & A

## Resources:

- Online Help has extensive documentation
- Don't hesitate to contact the Help Desk!
- Contact your Implementation Consultant or Senior Project Manager to discuss configuration changes



SHARE YOUR LEARNINGS:

 @fooholdtechnology  
 @fooholdtech

**#AWARDSU2018**

# Be sure to fill out your report card!

Give us your completed report card after your PM II session to be entered into the raffle to **win** a **Google Home Max!**



SHARE YOUR LEARNINGS:

-  @fooholdtechnology
-  @fooholdtech

**#AWARDSU2018**