

Quick Start Guide

For Incident / Investigation Coordinators

To Start

1. Your organization must be a customer of Practical Health Systems, Inc. and have been granted access to InfoServ DD.
2. You must have a computer (meeting our minimum requirements) with a working Internet connection.
3. A System Administrator from your organization must have set up your username and password in the system.
4. Start your browser and go to <http://www.infoservdd.com>.
5. Login to InfoServ DD by typing in your username and password and clicking on "Submit".

Incident Alert Setup

To produce **Incident alerts** in the form of email to supervisors and the Incident Management Coordinator(s):

1. Each employee should have his/her record updated with his or her correct Supervisor.
2. In addition, each Supervisor should have an email address in their employee record if you want them to receive an alert.
3. For the Incident Management Coordinator(s) to also receive an alert, your System Administrator should enter the Incident Management Coordinator's email address under the Agency Mgmt link from the Maintenance module.

If you have more than one coordinator, simply separate the addresses with a comma.

User Login Facts

The User Login screen is a security feature that allows the user to gain access to the *InfoServ DDSM* system. The option for logging into the *InfoServ DDSM* System is located on the right-hand side of the InfoServ home page. Ask your system administrator for your user name and password if you do not know it. Also contact your system administrator if you do not currently have access to the Incident / Investig. Module. (It will say "Access Denied" if you have not yet been given access.)

Menus / Options

Notice the major section headings at the top of the screen:



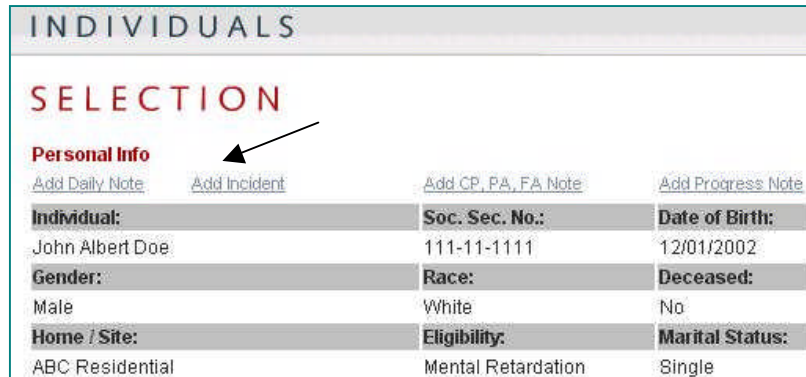
Incident and Investigation records are found in the "Individuals" section.

Other menus appear on the left-hand side of the screen. Click on the plus sign to the left of the item you wish to select when using these menus. "Links" appear in these menus and may be chosen by clicking anywhere on the underlined word or word phrase ("[Add Daily Note](#)" is a link).

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Adding an Incident

1. Select an individual if you have not yet done so.



The screenshot shows a web interface titled "INDIVIDUALS" with a sub-section "SELECTION". Under "Personal Info", there are four links: "Add Daily Note", "Add Incident" (highlighted with a black arrow), "Add CP, PA, FA Note", and "Add Progress Note". Below these links is a form with the following fields:

Individual:	Soc. Sec. No.:	Date of Birth:
John Albert Doe	111-11-1111	12/01/2002
Gender:	Race:	Deceased:
Male	White	No
Home / Site:	Eligibility:	Marital Status:
ABC Residential	Mental Retardation	Single

2. Click on the "Add Incident" link (to the right of the "Add Daily Note" link above the individual's name).
3. Enter in the appropriate information going down the page.
4. Note that you may check more than one of the "This Incident Required" checkboxes.
5. Note that if you check "Other Restraint", you should also fill in the "Other Restraint" text box to describe/define it.
6. Move down to the bottom of the form and click on "Submit".
7. A "New Incident Alert" will be sent to your supervisor and your own email address automatically (in the near future). This automatic alert is not yet active.
8. Optionally, you may add an incident from the "Add Incident" link found under "Incident / Investig.". This form is a longer form and is just like the one described in the next section. It includes investigation, program supervisor, contact and follow-up information not found in the short form.

Editing an Incident

1. Click on the plus sign to the left of the menu choice called "INCIDENT / INVESTIG."
2. Click on the [View Incidents](#) link.
3. The most recent incident entries are listed from most recent down to least recent. If your incident is not shown on the screen, then instead of clicking on View Incidents, click on [Search/Edit Incident](#) and put in an appropriate date range to search for it by.
4. Click on the [Edit](#) link (once). Give the edit screen time to load – it sometimes takes longer than usual.
5. Scroll down the page and find the field or fields you wish to edit (scroll down by holding down on your left mouse button with the mouse pointer located in the middle of the scroll bar on the far right of your browser and then by "dragging" the bar down).
6. Click on the "Submit" button at the bottom of the screen to save your changes.

Adding Investigation Information to an Incident

1. Click on the plus sign to the left of the menu choice called "INCIDENT / INVESTIG."
2. Click on the [View Incidents](#) link.
3. Click on the [Investigation](#) link on the corresponding incident that you wish to add investigation info to.
4. Fill in the information on the form and scroll to the bottom and click on "Submit" to save it.

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Adding a Committee Review Meeting and Follow-Up Tasks to an Incident

1. Click on the plus sign to the left of the menu choice called "INCIDENT / INVESTIG."
2. Click on the [View Incidents](#) link.
3. Click on the [Committee](#) link on the corresponding incident that you wish to add investigation info to.
4. Click on the [Add Committee Review Record](#) link to add a new Committee Review Meeting.
5. Fill in the information on the form such as the Committee Review Date, Issue Type, Description of Issue(s), Discussion, Committee Recommendations, Status, and be sure to click on the Follow-Up Required checkbox if there should be corresponding follow-up tasks assigned.
6. Scroll to the bottom and click on "Submit" to save it.
7. If you had "checked" the Follow-Up Required checkbox, a follow-up screen appears automatically.
8. If you're on the Follow-Up Action screen, enter the correct target date (or date the task should be completed by), choose the responsible party or type in a person who is not an employee in the "...OR Other Responsible Party" text box, type in an action to be taken, and click on the "Submit" button.
9. You are then taken to the Follow-up task record view screen, where you can continue to add more tasks to this same Committee Meeting, if needed, by clicking on the [Add Follow-Up Task Record](#) link.
10. If you want to add an additional Committee Meeting to this same incident, you must click on the [View Incidents](#) link on the left-hand menu, find the proper incident, and click on the [Committee](#) link. Then click on the [Add Committee Review Record](#) link.
11. You also may edit an existing Committee Meeting record by clicking on the [Edit](#) link instead of the [Add Committee Review Record](#) link.

Editing a Committee Review Meeting or Follow-Up Tasks to an Incident

1. Click on the plus sign to the left of the menu choice called "INCIDENT / INVESTIG."
2. Click on the [View Incidents](#) link.
3. Click on the [Committee](#) link on the corresponding incident that you wish to add investigation info to.
4. Click on the [Committee](#) link to edit a Committee Review Meeting.

Closing a Committee Review Meeting

1. Edit the Committee Meeting record you wish to close (see above).
2. Change the "Status" field to "Closed" when it (along with its corresponding follow-up tasks) have been completed.
3. Scroll to the bottom and click on "Submit" to save it.

The View My County Option

1. Click on the plus sign to the left of the menu choice called "INCIDENT / INVESTIG."
2. Click on the [View My County](#) link.
3. The most recent incident entries from the county that you are from will be listed. You are associated with this county because you were set up that way from the employee information screen, which asks for your "default" work site. This work site has a county attached to it as set up under Maintenance, [Agency Mgmt](#), and [View Sites](#). Contact the person in your organization who is in charge of maintaining employee information to change your default county, if necessary.
4. You may click on [View Incident Report](#) to see the incident report or you may click on [Upload/Attach File](#) or [Scan](#) if you want to attach a file to the incident or attach a scanned image to the incident, respectively. (See below for further information on uploading or scanning.)

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The Upload Option

1. There may be medical reports or other documents that need to be associated with an Incident or Investigation. These documents may be attached (associated) with a particular incident or investigation by clicking on the [Upload](#) link to the right of an incident shown while searching or viewing your incidents.
2. The upload option asks you for the location of the document you are going to attach/upload to the incident/investigation record. Use the "Browse" button to move around in the different folders on your computer to help you locate it, if needed. Click on "OK".

The Scan Option

1. There may be medical reports or other documents that need to be associated with an Incident or Investigation that do not exist in any form other than paper. These documents may be attached (associated) with a particular incident or investigation by clicking on the [Scan](#) link to the right of an incident shown while searching or viewing your incidents.
2. (See the separate scanning instructions found in the back of the InfoServ DD help/training manual or else the specific scanning instructions provided to your agency by PHS if you are using a multi-page scanner.)

Emailing an Incident Form

1. Click on the either the [View Incidents](#) or [Search/Edit Incident](#) link to find the incident you wish to email.
2. Click on the [Email](#) option to the right of the incident's description.
3. A mini-incident form appears.
4. Move down the page and fill in the appropriate email addresses.
5. Click on "Submit" after making sure that your e-mail date sent and time sent and all other appropriate information is correct.
6. This process may take a few seconds to complete. Please be patient while it creates the form and attaches it to an email (in the background).

Note: These email addresses may be pre-set so that they will default to the State's mr.incident@state.tn.us address and/or to internal email addresses within your organization by going into "Maintenance", "Agency Mgmt" and by editing these addresses there.

Report Link -- Viewing the Incident Form

1. Click on the either the [View Incidents](#) or [Search/Edit Incident](#) link to find the incident you wish to email.
2. Click on the [Report](#) link to the right of the incident's description.

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- The incident report appears (similar to the following):

REPORTABLE INCIDENT FORM – Tennessee Division of Mental Retardation Services	
Name of Person: Doe, John	Date/Time: 02/11/03 10:00 PM
Confidential, Please Print in Black Ink	
Agency Reporting: Skills Development Services, Inc. Region: M Agency Responsible, if different: Impact Center, Inc. Support Coordination Agency of Person Community Development Center Description of Incident (what/where/when/who) <i>Mr. Doe fell while taking a shower. he stated that he slipped on his bar of soap.</i> This incident was: <u>Discovered</u> > Where Incident Occurred <u>Home - Inside</u>	Description of Injury: must describe type, size, location/body part, color of injury; type and location of treatment; & other relevant information: <u>He hit the back of his head on the shower floor hard.</u>

(Top part of the State of Tennessee's Reportable Incident Form shown above)

- Click on your browser's "Print" icon to print it.
- If your browser automatically prints the page numbers and information on the footer, you may turn this function off by going to your browser's "File", "Page Setup" and then by deleting the information in the header and footer fields there.
- Optionally, you may click on your browser's "File", "Save As" in order to save the document to your computer's hard drive.
- If you have done the "Save As", then you may attach it to an email. You may open the document in Microsoft Word.

Incident Reports and Queries

- Click on the plus sign to the left of "INCIDENT / INVESTIG."
- Click on the plus sign to the left of "Reports".



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3. Notice the different report names from "By Description" down to "Incident Query".
4. Experiment with these reports by clicking on the report name.
5. Contact PHS for your "Incident Password" by emailing support@practicalhealthsystems.com.
6. The **Incident Query** is the most powerful option and requires that you are familiar with the options available on it. You can change the fields that appear on the report to other field names or even choose the "Blank" option that is found at the very top of the list. You can then "filter out" only the data you want by using the "Select Data for the report where" option. For example, if you want to see just incidents of clients who are class members of "Both", you would change the field from "Full Name" to "Class Member Type" and then type in "Both" in the blank to its right. You could also change the sort order with up to three sorts. Try clicking on the "Show Table Borders" and "Output to MS Excel Spreadsheet" options. In some cases, the "Output to MS Excel Spreadsheet" option may not work.
7. The **High Risk Review** report will show all incidents but will highlight in red those found for an individual where the total count is more than 3 for the date range specified.
8. The Investigation Info report includes information pertaining to a current or past investigation of incidents occurring between two dates.
9. The **Committee Meeting** report shows Committee Meetings and **Follow-up tasks** that were associated with those meetings, also between a starting and ending date range. This report allows you to view Pending, Closed, or All Committee Meeting records. Pending committee meetings mean that they have not yet been closed. (Close the committee meeting record by editing the record and marking it as closed.)
10. The **Incident Query** allows you to customize a report or possibly view detailed information that is not available in any of the reports mentioned above. The query comes pre-set with ten fields (columns) already chosen to appear on your report. However, you may change any of them by simply clicking on the column's pull-down option and selecting another choice. You are also able to "filter" information by selecting a field under "Select Data for the report where...", followed by a selection of the operator you need (like "contains", "after/greater than", "before/less than"), and then followed by the item you wish to filter by which you simply type in the blank to the right of the operator. For example, to see all incidents after the date of 10/31/2003, you would change the field "Full Name of Client" to "Incident Date", then choose the operator "after/greater than", and then type in 10/31/2003 in the blank. You may optionally set an "AND" or "AND NOT" condition to combine another filter with the first one to further limit the number of records you wish to see. You could then click on the "Generate Report" button to see the results. The default sort order is set as being in alphabetical order by client name. You could change this to "Incident Date" or any other field, or you could have multiple sorts like "Full Name of Client" with the second sort being "Incident Date" so that each client's incidents are in order by date within each client's set of incidents.
11. The **Committee Query** shows Committee Meeting results along with **Follow-Up Tasks**. You will receive one row of output for every follow-up task created. Therefore, the committee meeting information would be repeated for every follow-up task done for a single meeting. You may change the filtering criteria and/or sort order similar to the description above in the Incident Query for the Committee Query.

I verify that I understand this training material and am ready to begin using the Incident module in InfoServ DD.

Name (printed): _____

Signature: _____ Date: _____