QUALITY RISK MANAGEMENT (QRM)
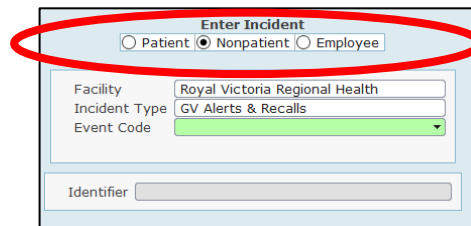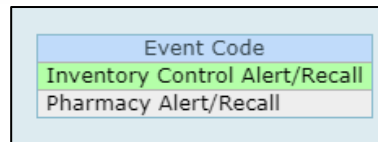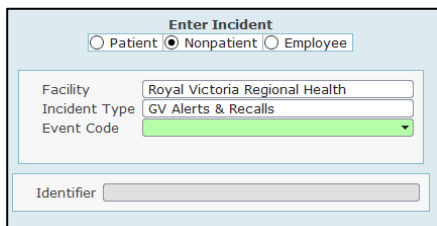## Alerts and Recalls Incident Entry

Overview

This document provides instructions on how to enter an Alert and Recall incident using the Incident Management System. This tip sheet is supplemental to the QRM Incident Management manual, located on the CARE4 website www.care-4.ca > Training > Resources > Administrative Training Materials > QRM.

Incident Entry (completed by the designated person in your organization)

From your home screen in Meditech click on the icon in the bottom right corner (triangle) or the cog in the top right corner and Report an Issue, choose "Incident".

Click the appropriate category for the person affected; for Alerts and Recall incidents choose "Non-Patient".

Choose the type of incident that occurred; for this example we have chosen "Alerts & Recalls". Then choose the event code, event code is a more specific description of the incident type, the form will then open.
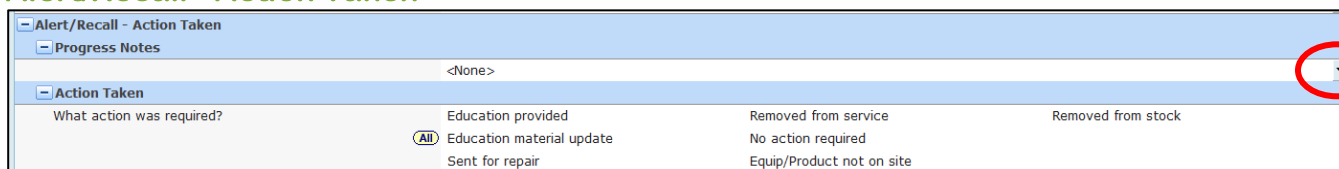

Alerts and Recalls Section (completed by the Inventory Control or Pharmacy staff member)

Alerts and Recalls			
Documents / Attachments			
Type of Document/Attachment(s)	Action Plan	Guideline	Policy
(All)	Agenda	Invoice	Presentation
	Attendance List/Register	Letter	Procedure
	Certificate	Memorandum	Patient Notes/Chart
	Email	Minutes	Report
	Fax	Medical Record	Statement
	File Note	Other Document Type	Training Materials
	Form	Photograph	
Attachment Instructions	Click the [Attachments] button at the bottom left side of the screen to attach the document(s). Documents must be saved in the Quality and Risk> Alerts Recalls Warnings folder in order to be accessible for upload.		

Click on the type of document you are to attach. Using the "Attachment" button in the bottom left corner of the screen, upload any documents relevant to this Incident. Note: ensure you follow the Attachment instructions as outlined on the form.
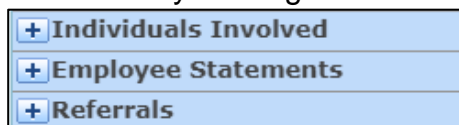
Alert/Recall - Action Taken

Alert/Recall - Action Taken			
⊟ Progress Notes			
	<None>		▾
⊟ Action Taken			
What action was required?	Education provided	Removed from service	Removed from stock
	(All) Education material update	No action required	
	Sent for repair	Equip/Product not on site	

Progress Notes: use the dropdown arrow to open up a documentation screen, here you can document any notes, actions etc. You can save and come back another time and enter further information. All information added will be in chronological order and indicate who entered the note.

Action Taken: click on the action(s) taken as required. Click ALL to select all listed actions, if applicable.

Additional Sections (for use if relevant)

The following sections are collapsed when you open the form. Expand the sections to document by clicking **+**.

⊞ Individuals Involved
⊞ Employee Statements
⊞ Referrals

Individuals Involved: add names of other individuals who were involved in following up on the alert/recall. No email notification is sent to them and they will not have ability to enter information.

Employee Statements: here you add a staff member who is required to enter a statement; an email notification will be sent upon adding them and saving the form. They will not see the whole form, only a text box to enter their statement.

Referrals: where necessary, you can refer another Manager/Leader to the incident, who will be notified via email. You have the ability to write a customized message providing more details in the "Message" field.

Filing Your Incident

When you have completed all sections of your incident; you can file it by clicking SAVE in the bottom right corner. You will be prompted if any mandatory fields were missed. A pop up will display notifying you that the incident has been filed as well as the incident number; you will also receive an email thanking you for submitting the incident and it will include the incident details.

When your incident has been reviewed and completed, you will receive a final email indicating the incident has been completed and filed.