

QUALITY and RISK MANAGEMENT

Incident Management System (IMS)

Overview

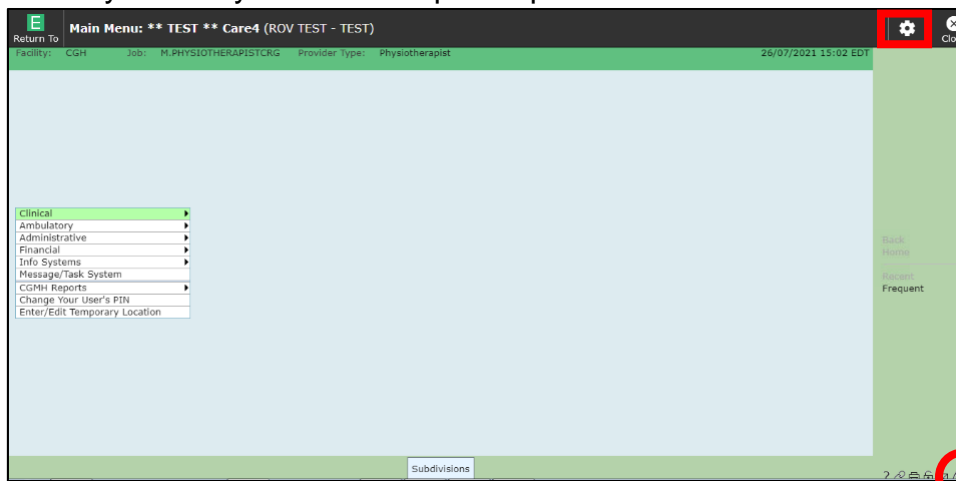
This document provides instructions on how to enter, manage and create a quality of care review within the QRM module.

Functionality & Tips

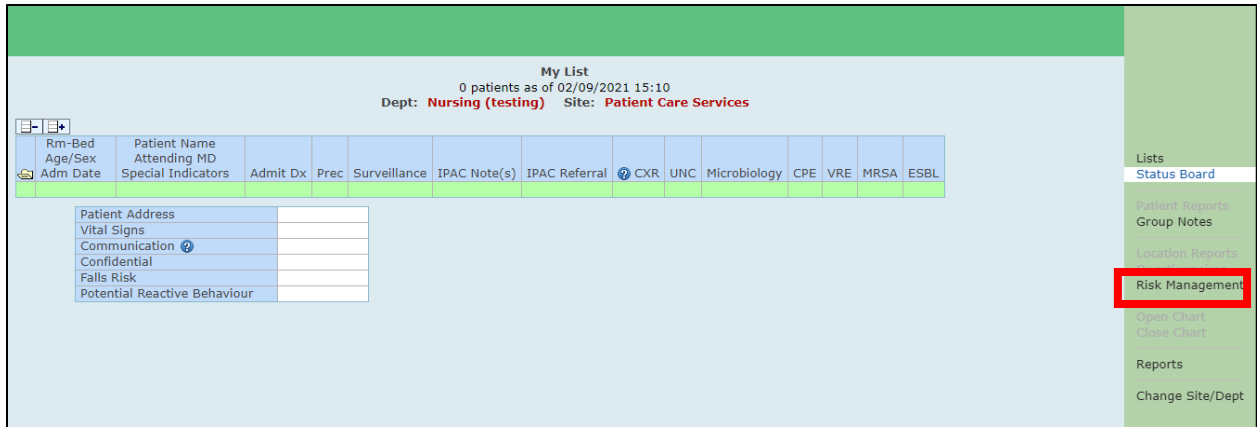
- The number and type of sections within incident forms may differ slightly depending on the type of Incident being entered and the affected person (e.g. patient, non-patient or employee).
- Fields that have an * are mandatory and you will be unable to save without completing them.
- The “-” and “+” buttons above or beside a section will collapse and/or open that section.
- “ALL” button will select all options within a section; click once to select, click twice to deselect.
- The “+” and “X” buttons below entry fields are for adding additional information/names or removing ones entered in error.

How to Enter an Incident

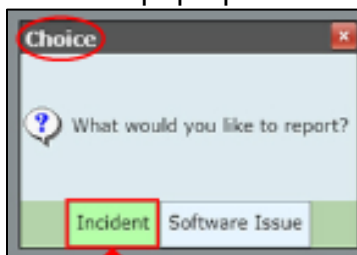
In order to enter an incident you can click on the Cog in the upper right corner or the triangle symbol in the lower right hand corner. One or both of these options will be available to you in any Meditech Expanse platform.



The Incident Management System is also available from PCS/EDM modules via the Risk Management option; then click “New” to start entering an incident.



From the pop-up window choose “Incident”.



Choose: the individual who was affected

Facility: populates where you work

Incident Type: what happened?

Event Code: more specific to the incident

Name of Individual who was affected or injured

Template Outline

Submitter Sections

All templates have submitter entry areas and manager/leader entry areas. The submitter area outlines the incident that occurred, any actions taken, the reason the incident happened and any other individuals who were present at the time.

These sections will be filled out by the submitter. However sections differ based on the incident being entered or the individual who was affected.

Manager/Leader Sections

- + Event Information
- + Event Severity
- + Individuals Involved/Witnesses
- + Individuals Notified
- + Cause
- + Progress Notes
- + Employee Witness Statement
- + Referrals
- + Disclosure
- + Corrective Action
- + Reportables
- + Related Incidents
- + Final Disposition

The assigned Manager/Leader can review the submitted information, edit if necessary and complete the remaining sections.

Incident Template

Event Codes

From here you can change the event code that you picked, on the initial page, without having to cancel out of the incident to choose the correct one.

QRM, Five 21/08/2020 13:08 - VD0000009/20 V000000453
 29 M 05/05/1992 Patient REG CLI V.CARDIOVE Fall Event Date/Time: New

Event Information

- *Event Codes
- From Standing X
- New
- Event Information
- *Event Date
- Event Time

Click NEW

Event Information

- *Event Codes
- On Level Ground X
- New
- Fall From Height
- Slip
- Trip
- From Standing

Choose the intended event code from the list

Event Information

- *Event Codes
- From Standing X
- Fall From Height X
- New

Click X to remove the wrong event code

Event Information

- *Event Codes
- Fall From Height X
- New

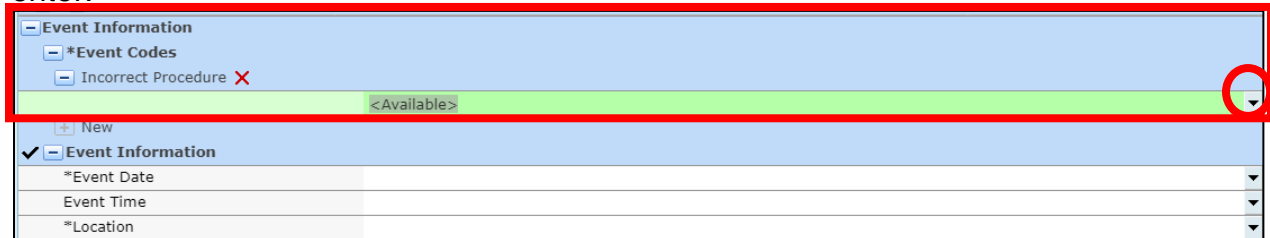
Your new event code is now listed.

CDS (Customer Defined Screen)

Some incidents have an additional step in the event code section, specifically:

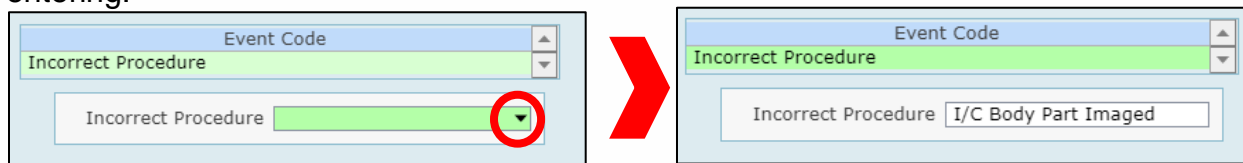
- Compliment, Concern, Discrimination, Inquiry and FYI (Patient Relations RVH only)
- GV Internal Pharmacy (GBGH & RVH)
- GV Imaging Services (GBGH & RVH)
- GV Labour/Delivery and Maternal Child (GBGH & RVH)

These incidents have an additional entry section below the event code that you must enter.



The screenshot shows the 'Event Information' section. Under 'Event Codes', there is a dropdown menu currently showing '<Available>'. A red box highlights this area, and a red circle highlights the dropdown arrow. Below this, the 'Event Information' section is expanded, showing fields for '*Event Date', 'Event Time', and '*Location'.

Click the drop-down arrow and select the most appropriate option for the incident you are entering.

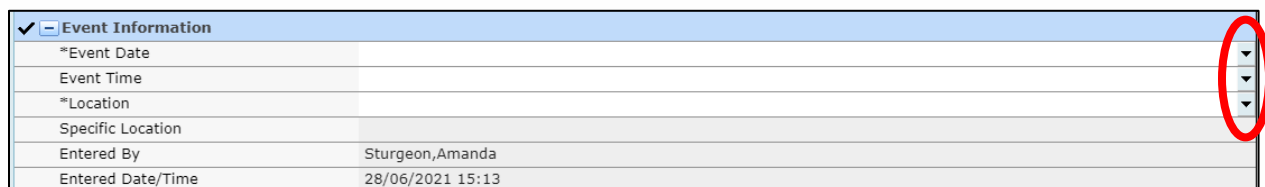


The diagram illustrates the selection process. On the left, the 'Event Code' dropdown is set to 'Incorrect Procedure'. A red circle highlights the dropdown arrow. A red arrow points to the right, where the 'Event Code' dropdown is still 'Incorrect Procedure', but a sub-field 'I/C Body Part Imaged' is now visible and populated.

In this example event code “Incorrect Procedure” has the additional factor of “Incorrect Body Part Imaged”.

Event Information

Staff must enter the date of the incident and location; by choosing the location the system knows which manager/leader to send the incident report to. Entered by and Entered Date/Time will automatically populate when the incident is entered.



The screenshot shows the 'Event Information' section expanded. Fields include '*Event Date', 'Event Time', '*Location', 'Specific Location', 'Entered By' (populated with 'Sturgeon, Amanda'), and 'Entered Date/Time' (populated with '28/06/2021 15:13'). A red circle highlights the dropdown arrow for the 'Location' field.

Objective Description of the Event:

Using the drop-down arrow, a documentation box will open. In this section you will document the event, giving only facts, and no names should be used.

Objective Description of Event	
Instructions	Briefly describe the incident in your own words. Describe what you saw/heard/did. Include any actions taken when the event happened to mitigate harm caused (e.g., details of first aid administered, procedures followed, etc.).
	Enter facts, not opinions. Do not enter names of staff or patients in this section (enter names in the Individuals Involved/Witnesses section below).
*Description of Event	
EMR Formatted Data	<None>

Description of Event

Using the drop-down arrow for EMR Formatted Data, will allow you to pull the last entered information from EMR for that patient.

Data Formats = documented information directly from patient chart in EMR (e.g. vitals, allergies, labs, imaging).

Add Field = any data available on the list, of that has been entered, can be pulled into the documentation (Account, Insurance, Address, Provider, admit date etc.).

Canned Text = frequently used, prepopulated statements that can be added to a chart quickly.

Note: *EMR formatted Data* section may not be available on some templates.


Associated Employee Injury

Some templates require staff to indicate if an employee was injured during the patient incident, and if so, reminds them to complete a separate Employee Incident.

Associated Employee Injury?	
Was This Patient Incident Associated With An Employee Injury	Yes No
If Yes, Please Complete An Employee Incident	

Individuals Involved/Witnesses

Staff can add names of other individuals who were there during the incident. Click on the drop-down arrow and choose from the list. No email notification will be generated and the individual will not be able to view or edit the incident that they are named in.


- Individuals Involved/Witnesses			
Instructions Please add any anyone who was involved in this incident.			
Other Individuals Involved	Contact Type	Name	
			
+ x			

Individuals Notified/Parties Notified

Staff can identify the individuals who were notified that the incident occurred, this is a single or multiple choice field. Click to select, a second click will unselect.


- Individuals Notified			
Parties Notified	Manager	Most Responsible Provider	Family
	 Hospital Coordinator/HSL	Director/VP	Visitor
	Supervisor/Coordinator	POA/SDM	Other

Note: there may be different sections to capture this information based on Incident Type and Facility.

- Manager/Other Parties Notified			
	*Contact Type	*Name	*Date/Time
			
+ x			

Cause (Note: not on all templates, it is dependent on facility and/or Incident type)


Choose from the list by clicking on the drop-down arrow. Where there is more than one cause, click “+” to choose another. If there is only one associated ‘General Cause’ it will automatically populate. Where there is more than one cause, you will choose a primary cause (most contributing). The list of causes are specific to the type of incident being entered.

- Cause			
	Specific Cause	General Cause	Primary
			<input type="radio"/>
+ x			

Event Severity

Use the drop-down arrow to open up the menu for your event severity. If needed you can refer to the [Event Severity Scale](#) reference document below for clarification.

Note: the severity scale is different between patient/non-patient incidents and employee incidents at CGMH

- Event Severity	
	

- | Name |
|--|
| 1) Near Miss - Did not reach the patient/person/organization |
| 2) No Harm - Resulted in no harm to patient/person/organization |
| 3) Harm: Non Severe/Non Critical - Resulted in additional monitoring/treatment |
| 4) Harm: Severe/Critical - Major med/surg tx or long- term harm/disability/death |

Event Severity Scale Reference

Harm/Severity Levels for Patient and Non-Patient Incidents			
Harm Level	Definition	Clinical / Patient Examples	Non-Clinical / Non-Patient Examples
Near Miss	<ul style="list-style-type: none"> Incident that did not reach the patient 	<ul style="list-style-type: none"> Wrong isolation signs on door, which is corrected before someone enters with inappropriate PPE Almost gave a medication and realized the patient has a known allergy to that medication 	<ul style="list-style-type: none"> Ice buildup on the sidewalk at patient entrance Malfunctioning automatic door that is closing too quickly is reported by a Volunteer and repaired
No Harm	<ul style="list-style-type: none"> Incident that reached the patient, but no discernable harm resulted 	<ul style="list-style-type: none"> Bloodwork drawn on the wrong patient – discovered and drawn on the correct patient Wrong medication/dose given to patient with no discernable harm 	<ul style="list-style-type: none"> Malfunctioning automatic door that is closing too quickly hits a volunteer causing them to fall without injury
Harm: Non-Severe/Non-Critical	<ul style="list-style-type: none"> Patient outcome is symptomatic Symptoms are mild/moderate May require some level of intervention May cause short term to permanent harm or loss of function May require increased length of stay 	<ul style="list-style-type: none"> Incorrect dose of blood pressure medication given to patient resulting in blood pressure drop. IV bolus given; no further intervention required Post-operative patient given soft diet instead of clear fluids Patient fall resulting in laceration, bruise, fracture etc. Patient fall resulting in small subdural hematoma that did not cause any symptoms but required them to stop blood-thinners 	<ul style="list-style-type: none"> Malfunctioning automatic door that is closing too quickly hits a volunteer causing them to fall and fracture an arm A physical altercation between two visitors results in one being treated for a broken nose
Harm Level	Definition	Clinical / Patient Examples	Non-Clinical / Non-Patient Examples
Harm: Severe/Critical	<ul style="list-style-type: none"> Patient requires life-saving intervention or major surgical/medical intervention Life expectancy may be shortened May cause major permanent, or long-term harm or loss of function May result in death that on the balance of probabilities was caused or brought forward by the incident 	<ul style="list-style-type: none"> Medication was given that patient was known to be allergic to – patient required transfer to ICU, resulting in increased length of stay Unexpected death, including suicide within the organization Patient fall resulting in subdural hematoma that caused one-sided weakness requiring rehabilitation Defective medical device causes disconnection of dialysis line resulting in significant blood loss requiring transfusion 	<ul style="list-style-type: none"> Infrastructure failure causing death of a visitor

Referrals

This section captures who the incident will be sent to. Referrals are automatically populated based on location/unit/area and/or incident type.

For Allied Health staff and Support Services Staff:

If you do not see your manager listed in the Referrals section, you must add them. Click the + symbol, and type in your Manager/Leader/Supervisor last name.

The screenshot shows a 'Referrals' section with a table. The table has columns for 'Refer To', 'Primary', and 'Statement'. A red arrow points to a plus sign (+) next to the text 'Mt, Meditech' in the 'Refer To' column. Below the table is a 'Message' field.

This ends the submission of an Incident by a staff member. The following sections are applicable to Manager/Leaders/Supervisors who follow up on Incidents.

Progress Notes

Managers/Leaders/Investigators will enter notes by clicking on the drop-down arrow which opens up a documentation section. Use the data formatting buttons as described in the Objective Description of Events Section above.

Progress Notes

Progress Notes <None>

Sturgeon,Amanda Employee RV ONA PRC (Workload) Event Date/Time: New

Verdana 10pt B I U

Entered by Sturgeon,Amanda 04/09/2021 9:22 am EDT:

Witness (Manager Use Only)

Witness MANAGER USE ONLY

Staff Statement	Name	Statement

Message to Staff Witnesses + x

Managers/Leaders/Investigators can add a Staff Witness using the same process as done in previous sections. When a staff witness is added the staff member will receive an email notification asking them to enter a statement. You also have the option of including a message to the employee witness (e.g. *Please provide details of your involvement in the incident. Thanks, Amanda*).

Referrals

Where the assigned Manager (“Primary referral”) deems necessary they can refer to another Manager/Leader/Supervisor. To add another Manager click on the drop-down arrow or click the + symbol to open the Staff dictionary and search by last name. This will generate an email to that person advising them of their referral and the incident information. Use the Message text box to add a custom message/instructions to the email the referred person will receive.

Note: Automatic referrals are pre-populated based on location/unit/area and/or incident type.

Referrals

PLEASE NOTE DO NOT enter investigation notes in the "Statement" field. ENTER ALL NOTES IN PROGRESS NOTES Section.

If Manager and HSL/Hospital Coordinator were notified but are not listed below, please add them.




*Refer To	Primary	Statement
Mt,Meditech	<input type="radio"/>	<None>

Message + x

Completing your Referral

Once you have reviewed a referred incident, entered your progress notes and completed your follow-up on the incident you should mark your referral as “Completed” to remove the incident from your worklist. This also lets other referred Managers know you have finished working on this incident as a (C) will appear in front of your name in the “*Refer To” list and the “Referrals” column on other referred Manager’s worklists.

Note: Choosing “Primary” will bring the Manager/Leader/Investigator to the top of the Refer To list. The primary referral is the person responsible for the management of the incident within IMS.

Referrals			
PLEASE NOTE	DO NOT enter investigation notes in the "Statement" field. ENTER ALL NOTES IN PROGRESS NOTES Section.		
	If Manager and HSL (RVH)/Hospital Coordinator (GBGH), if notified, are not listed below please add them.		
*Refer To	Primary	Statement	
Avey,Sharon	<input type="radio"/>	<None>	
Densmore,Miranda	<input type="radio"/>	<None>	
Johnson,Gloria	<input type="radio"/>	<None>	

1. Click the “i” beside your name.

2. Click in the Completed Date/Time field, enter the date & time you completed your involvement. Shortcut reminder: you can enter “t n” and click enter.

Manager	Statement	Completed Date/Time	Auto-Referred
Avey,Sharon	<None>		Yes
Densmore,Miranda	<None>		
Johnson,Gloria	<None>		
Kaushal,Ajay	<None>		
Mt,Meditech	<None>		
* Referral Date/Time		28/05/2021 13:12	

Disclosure


This section appears on all patient incident forms and includes one mandatory question. If the incident was disclosed the other fields should be completed. If disclosure has not yet been decided, choose still investigating. This can be changed prior to setting the final disposition.



Disclosure			
Disclosure	It is the Hospital policy to disclose harm after a patient safety incident in compliance with the Canadian Patient Safety Institute's Canadian disclosure guidelines, College of Physicians and Surgeons of Ontario, and College of Nurses of Ontario.		
*Was This Incident Disclosed?	Yes	No	
	Still Investigating	N/A-Did not reach patient	
Date Disclosure Occurred			Comment:
Disclosure Provided To:	Patient	SDM	
	Family	Other	
Disclosure Provided By:	Allied HealthProfessional	Most Responsible Provider	Pharmacy
	Manager	Nurse	Privacy Office

Corrective Action

This is where you can document the corrective action taken to prevent the incident from happening again (e.g., policy review, education etc.).

Corrective Action



 **New** 

Click “New”; a picklist will appear, choose the appropriate one. A comment field is available if you want to document a statement explaining the action taken.

Reportables

This section is similar to the Corrective Action section. Note: completing this field, does not notify anyone/agency, it strictly documents that a person/agency/committee was notified of the incident.

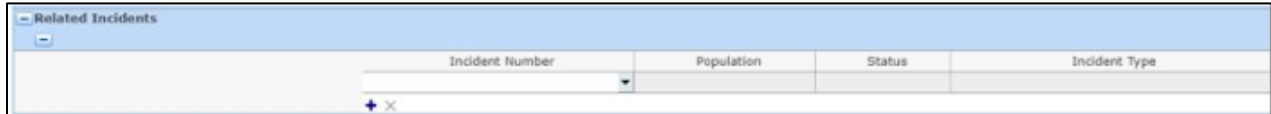
Reportables



 **New** 

Related Incidents

If there are any similar or duplicate incidents for this particular patient, you can link them here. Click the drop-down arrow beside Incident Number and the related incidents will display, choose the associated one by clicking on it; it will now populate in the section.



Incident Number	Population	Status	Incident Type

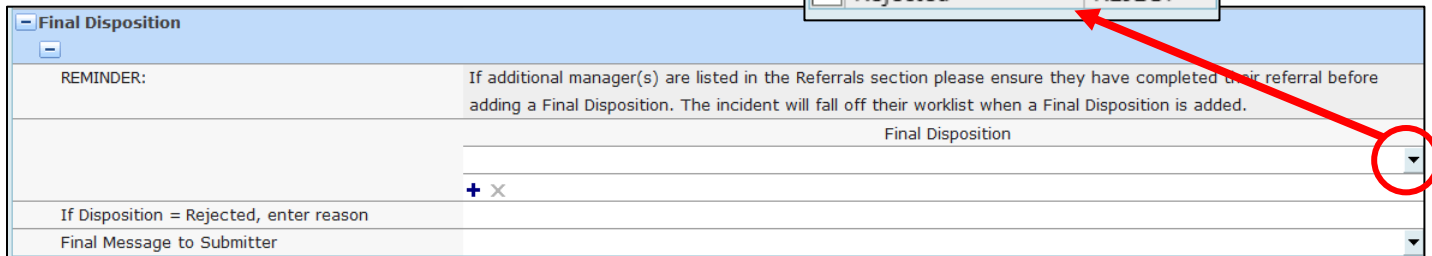
Final Disposition

Final disposition should only be set, by the primary referral, once all other parties in the referral section have entered a statement or completed their review. To complete an incident, choose one of the options from the drop-down menu. If you choose rejected, enter the reason in the comment box below.

Final Message to Submitter: you can enter a custom message in this text box, which will be included in the email sent to the person who submitted the incident. It is suggested you add your name so they are aware of who the message is from; as emails are sent from "Partners4Health".

Once complete the incident will be filed and removed from the Incident Desktop.

	Name	Mnemonic
<input type="checkbox"/>	Follow-up Complete	FC
<input type="checkbox"/>	Rejected	REJECT



Final Disposition

REMINDER: If additional manager(s) are listed in the Referrals section please ensure they have completed their referral before adding a Final Disposition. The incident will fall off their worklist when a Final Disposition is added.

Final Disposition

+ x

If Disposition = Rejected, enter reason

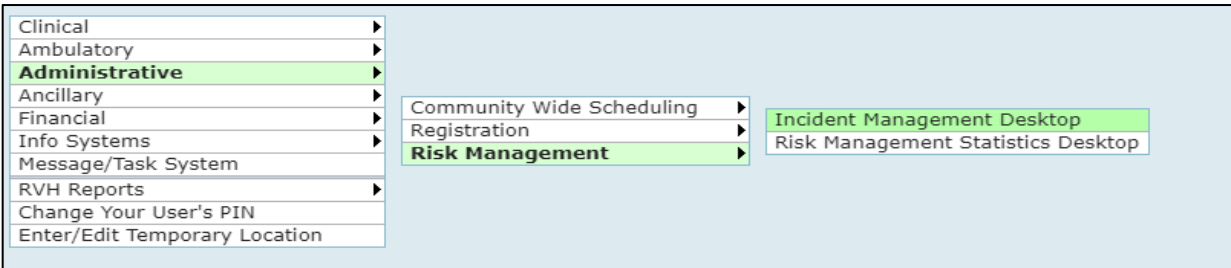
Final Message to Submitter

The following pages are for Managers/Leaders/Investigators. This will review Incident Follow-up, Functionality of the Incident Management Worklist and how to create an Incident Review.

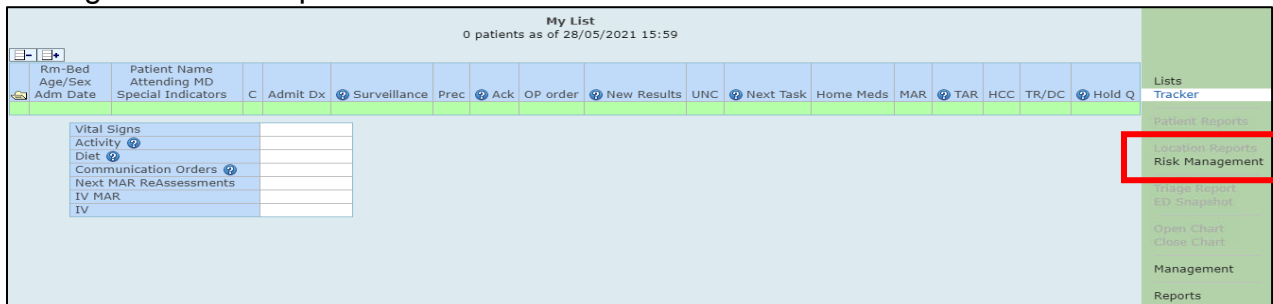
Incident Management Worklist Reference Sheet

You can get to the Incident Management worklist in 2 ways:

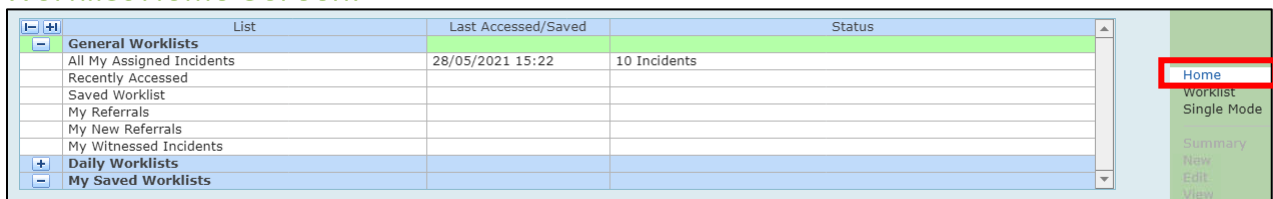
1. Main menu/home screen.



2. Risk Management button on your side menu from PCS, EDM tracker or SUR tracker. Click **Risk Management** and you will be taken to your home screen in the Incident Management Desktop.



Worklist Home Screen:



By clicking **HOME** on the menu, you will see a summary of incidents, as shown above. Below are the explanation for a few of the most commonly used worklist options.

- *All My Assigned Incidents* are the incidents which occurred in the area/department/unit you manage.
- *My Referrals* are all incidents that you have been referred on.
- *My New Referrals* are the incidents that someone has included you on for your review since your last log in.

- *My Witnessed Incidents* are those which you have been added as a Staff Witness and you need to enter your statement regarding the event.

Worklist Screen:

All columns can be sorted by the label in the blue header bar in ascending or descending order.

An arrow will be visible to show you what the worklist is currently sorted by. For example, the worklist below is sorted by event severity in descending order.

Severity	Name Account Number	Location	Incident Type Incident Number Incident Date/Time	Event Code	Referrals
1) Near Mis...	QRM,One VE0000029/20	Patient Food Services	RV Exposure: Bld/BodyFids/Shrps V2021-000207 05/07/2021 10:15	Blood/Bodily Fluids	Avey,Sharon Densmore,Miranda Gross,Leigh
1) Near Mis...	QRM,One VE0000029/20	Cancer & Palliative	Equipment/Device V2021-000118 13/04/2021	Equipment - Faulty	Densmore,Miranda Shennan,Stephanie
1) Near Mis...	QRM,One VE0000029/20	Radiation Treatment	RV Radiation Treatmnt Use ONLY V2021-000168 09/06/2021 15:55	RV Radiation Treatment	(E) Kaushal,Ajay Shennan,Stephanie Treatment,Radiation
2) No Harm...	QRM,two ME0000003/20	Medical	Infection Control M2021-000016 23/06/2021 09:00	Exposure	Avey,Sharon Densmore,Miranda (E) Johnson,Gloria
2) No Harm...	QRM,One VE0000029/20	3SB Medicine	Fall V2021-000196 25/06/2021 08:59	Trip	(E) Kaushal,Ajay
3) Harm: N...	QRM,Five VD0000009/20	Cardiac & Renal	Medication/ Fluid V2021-000181 17/06/2021 10:14	Missed Dose	(E) Avey,Sharon (C) Densmore,Miranda (C) Johnson,Gloria
3) Harm: N...	QRM,One VE0000029/20	Emergency	Fall V2021-000190 24/06/2021 09:31	Fall From Height	Avey,Sharon Densmore,Miranda Johnson,Gloria
3) Harm: N...	QRM,One VE0000029/20	Emergency	Fall V2021-000191 24/06/2021 09:36	From Standing	Avey,Sharon Densmore,Miranda Johnson,Gloria

- Severity levels are colour coded based on level of harm
Near Miss = No colour/White
No Harm = Yellow
Harm: Non Severe/Non Critical = Orange
Harm: Severe/Critical = Red

Referrals – Actions Taken by Others

Severity	Name Account Number	Location	Incident Type Incident Number Incident Date/Time	Event Code	Referrals
	QRM,One VE0000029/20	Cardio Georgian Bay Gen Hosp	Equipment/Device V2021-000082 18/02/2021	Equipment - Loss	(E) Avey,Sharon Johnson,Gloria (V) Kaushal,Ajay
		Alerts & Recalls	GV Alerts & Recalls V2021-000060 08/02/2021 15:15	Inventory Control Alert/Recall	(E) Avey,Sharon Kaushal,Ajay (E) Shennan,Stephanie
Harm: Non ...	QRM,One VE0000029/20	TEST	Safety Security V2020-000014 30/10/2020 15:30	Abuse/Assault/Harassment	(V) Avey,Sharon (C) Kaushal,Ajay
4) Harm: S...	QRM,One VE0000029/20	Emergency	Lab V2021-000146 05/05/2021 16:40	Lost/Missing Specimen	(V) Avey,Sharon (E) Kaushal,Ajay

Other Manager's actions to date are indicated by the letter in front of their name:

- No letter means they have not opened the incident
- (V) = Viewed incident
- (E) = Entered notes
- (C) = Completed their involvement

Worklist Side Bar Functionality

The tasks are listed on the right-hand side of the screen, the menu. NOTE: the functions outlined below may or may not be available to you depending on your access. If a function is not available it will not be visible in your side-bar.

When first opening your Risk Management Desktop the right panel functions are limited. Functions that are greyed out are only available when you search via Single Mode.

The screenshot shows a table with columns: Severity, Name, Account Number, Location, Incident Type, Incident Number, Incident Date/Time, Event Code, and Referrals. The table contains six rows of incident data. To the right of the table is a side bar with the following menu items: Home, Worklist, Single Mode, Summary, New, Edit, View, Change Status, Fix, Switch Acct, Assign Coverage, Witness Stmt, Create Review, Reports, Record Req, and EMR. The side bar is highlighted with a red box.

Single Mode

You can search for any incident by clicking on the drop-down arrow and entering the required information in the appropriate fields:

- Incident Number (e.g. V2021-127 the leading zeros are not required)
- Account Number (Name, Account #, EMR # or Medical Record #)
- Employee (Name or Employee #)
- Non-patient (Incident number only e.g. V2021-36)
- Accessed (accounts you have most recently accessed)



You will notice that the previously greyed out functions are now available for use.

The screenshot shows the 'Incident Identifier' search field at the top left. The side bar on the right is highlighted with a red box and a red star icon. The side bar menu items are: Home, Worklist, Single Mode, Summary, New, Edit, View, Change Status, Fix, Switch Acct, Assign Coverage, Witness Stmt, Create Review, Reports, Record Req, and EMR.

Summary

When an incident is selected on the worklist, clicking Summary provides a list of all incidents for the same Account/Med Rec Number (this visit only) or Employee.

New

Clicking NEW on the menu, will open the main incident-entry screen to enter a new safety incident

Edit

When an incident is selected on the worklist, clicking edit allows you to make changes to the incident

View

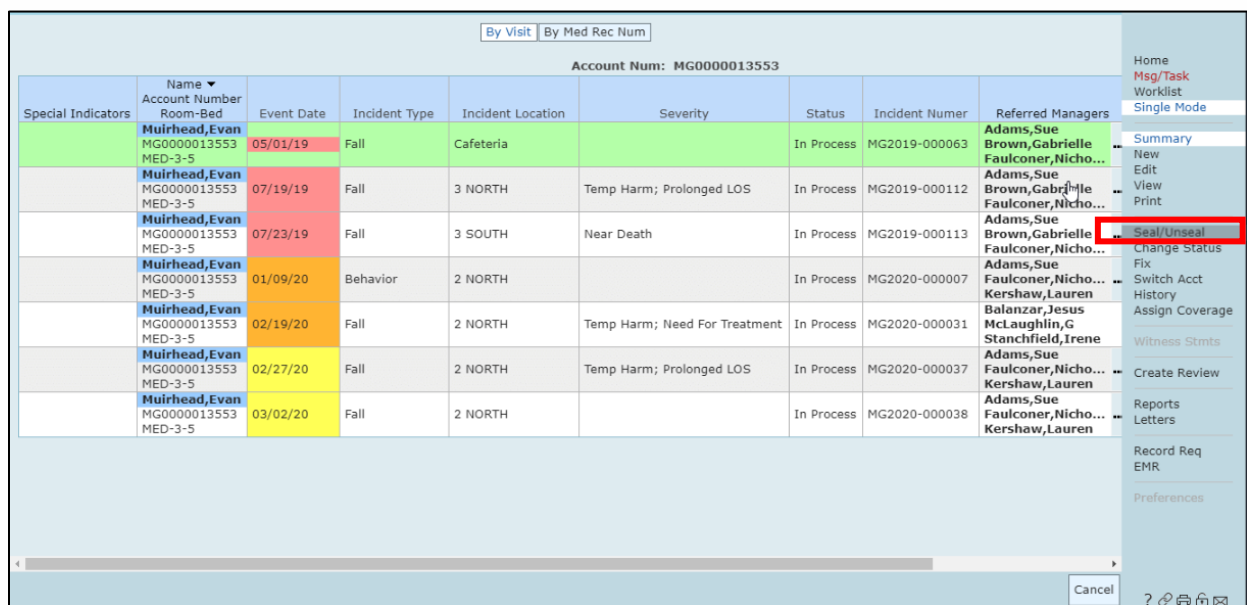
When an incident is selected on the worklist, clicking view allows you to review the incident but you are unable to edit any fields.

Print

NOTE: For privacy reasons, the print feature is available to a specified group of individuals. When an incident is selected on the worklist, clicking print gives those who have access the option to print or print preview. Upon clicking print you will have the option to suppress blank sections, or only print selected fields.

Seal/Unseal

This function allows users to restrict access to an incident.



The screenshot shows a worklist table with columns: Special Indicators, Name (Account Number, Room-Bed), Event Date, Incident Type, Incident Location, Severity, Status, Incident Number, and Referred Managers. The table lists several incidents for account number MG0000013553. A right-hand menu is open, showing options like Summary, New, Edit, View, Print, Seal/Unseal (highlighted with a red box), Change Status, Fix, Switch Acct, History, Assign Coverage, Witness Stmt, Create Review, Reports, Letters, Record Req, EMR, and Preferences. A 'Cancel' button is at the bottom right.

Special Indicators	Name Account Number Room-Bed	Event Date	Incident Type	Incident Location	Severity	Status	Incident Number	Referred Managers
	Muirhead,Evan MG0000013553 MED-3-5	05/01/19	Fall	Cafeteria		In Process	MG2019-000063	Adams,Sue Brown,Gabrielle Faulconer,Nicho...
	Muirhead,Evan MG0000013553 MED-3-5	07/19/19	Fall	3 NORTH	Temp Harm; Prolonged LOS	In Process	MG2019-000112	Adams,Sue Brown,Gabrielle Faulconer,Nicho...
	Muirhead,Evan MG0000013553 MED-3-5	07/23/19	Fall	3 SOUTH	Near Death	In Process	MG2019-000113	Adams,Sue Brown,Gabrielle Faulconer,Nicho...
	Muirhead,Evan MG0000013553 MED-3-5	01/09/20	Behavior	2 NORTH		In Process	MG2020-000007	Adams,Sue Faulconer,Nicho... Kershaw,Lauren
	Muirhead,Evan MG0000013553 MED-3-5	02/19/20	Fall	2 NORTH	Temp Harm; Need For Treatment	In Process	MG2020-000031	Balanzar,Jesus McLaughlin,G Stanchfield,Irene
	Muirhead,Evan MG0000013553 MED-3-5	02/27/20	Fall	2 NORTH	Temp Harm; Prolonged LOS	In Process	MG2020-000037	Adams,Sue Faulconer,Nicho... Kershaw,Lauren
	Muirhead,Evan MG0000013553 MED-3-5	03/02/20	Fall	2 NORTH		In Process	MG2020-000038	Adams,Sue Faulconer,Nicho... Kershaw,Lauren

You must choose the incident you wish to seal/unseal by highlighting in the worklist view or by using the single mode search.

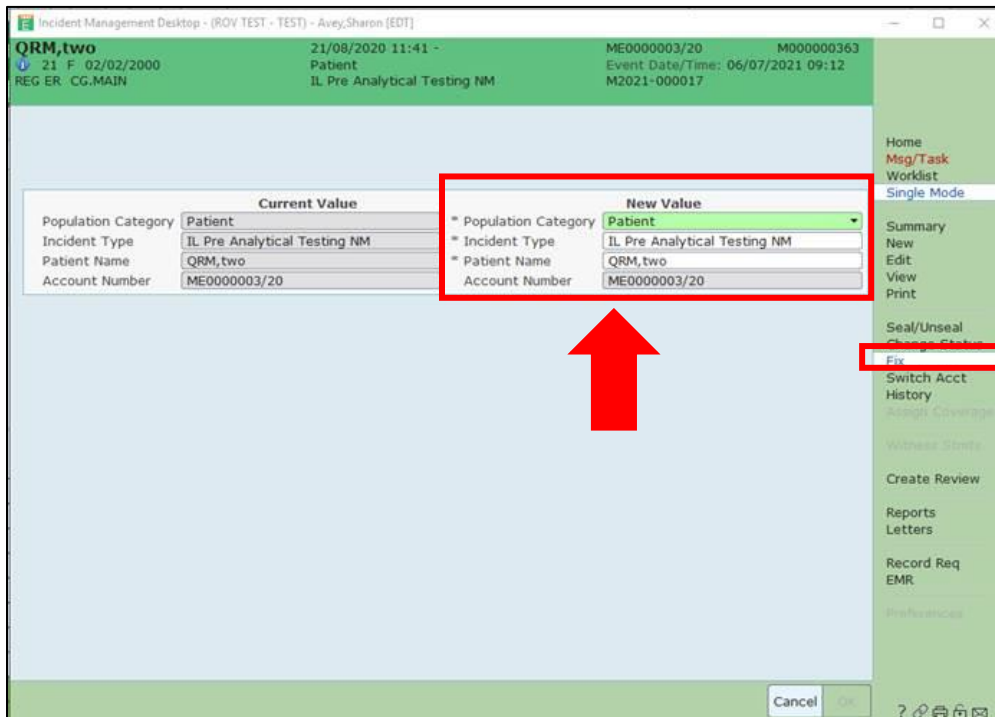
- Choose Seal/Unseal Yes/No
- Enter the reason for Sealing or Unsealing
- Hit SAVE

Fix

Allows you to change the review type or change the patients name when the wrong one was selected initially. This can only be accessed via a single mode search (e.g., name, account number, EMR or Medical Record number must be known). From the summary



screen select the account you wish to fix. Below you will see we can fix the following categories listed.

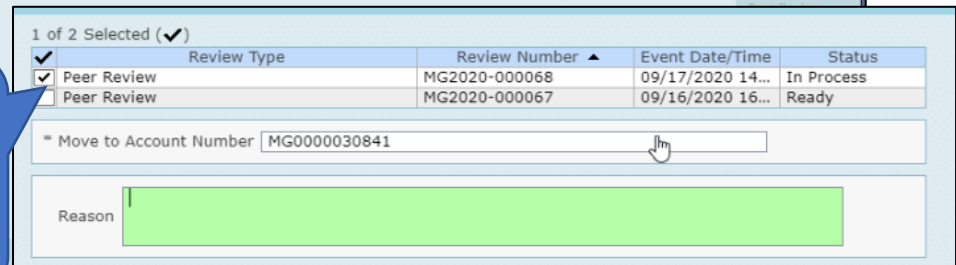


Switch Account

Allows you to switch the account the review was associated to. Again, search by single mode and highlight the incident which you wish to correct and click “Switch Acct”.



Check off the review you want to switch the account to. Choose the associated account in the next field. Then enter a reason if applicable



History

This function acts as an audit trail for Incidents, and will display any actions taken and fields that were documented in.

This can be accessed from your worklist or by the single mode function. Highlight the incident you wish to review and click on history on the menu bar.

Name	Account Number	Room-Bed	Special Indicators	Event Date	Incident Type	Incident Location	Severity	Status	Incident Number
Muirhead,Evan	MG0000013553	MED-3-5	Antibiotic Resistant Disease.	05/01/2019	Fall	Cafeteria	Temp Harm; Prolonged LOS	In Process	MG2019-000063
Muirhead,Evan	MG0000013553	MED-3-5	Antibiotic Resistant Disease.	07/19/2019	Fall	3 NORTH	Temp Harm; Prolonged LOS	In Process	MG2019-000112
Muirhead,Evan	MG0000013553	MED-3-5	Antibiotic Resistant Disease.	07/23/2019	Fall	3 SOUTH	Near Death	In Process	MG2019-000113
Muirhead,Evan	MG0000013553	MED-3-5	Antibiotic Resistant Disease.	01/09/2020	Behavior	2 NORTH		In Process	MG2020-000007
Muirhead,Evan	MG0000013553	MED-3-5	Antibiotic Resistant Disease.	02/19/2020	Fall	2 NORTH	Temp Harm; Need For Treatment	In Process	MG2020-000031
Muirhead,Evan	MG0000013553	MED-3-5	Antibiotic Resistant Disease.	02/27/2020	Fall	2 NORTH	Temp Harm; Prolonged LOS	In Process	MG2020-000037
Muirhead,Evan	MG0000013553	MED-3-5	Antibiotic Resistant Disease.	03/02/2020	Fall	2 NORTH		In Process	MG2020-000038

Incident Management Desktop (DEV21.US)

Muirhead,Evan 04/30/2019 14:30 - 06/07/2020 00:00 MG0000013553 MR00010082
 Patient Event Date/Time: 05/01/2019
 Fall MG2019-000063

* From Activity Date/Time 05/01/2019 15:03
 * Thru Activity Date/Time 08/11/2020 10:09

Include Data Fields For
 Incidents Registration

User: [] Include: All Data Field: [] Include: All Queries: []

Date/Time	Key	Data Field	Action	User
05/01/2019 15:03		Event Code (Key)	New	Muirhead,Brett
05/01/2019 15:03	♦	Event Code Comment	New	Muirhead,Brett
05/01/2019 15:03	♦	Indiv Inv Cont Type	New	Muirhead,Brett
05/01/2019 15:03	♦	Indiv Inv Role	New	Muirhead,Brett
05/01/2019 15:03	♦	Indiv Inv Provider	New	Muirhead,Brett
05/01/2019 15:03		Location	New	Muirhead,Brett
05/01/2019 15:03	♦	Mgr Auto-Referral	New	Muirhead,Brett
05/01/2019 15:03	♦	Mgr New Referral	New	Muirhead,Brett
05/01/2019 15:03	♦	Mgr Referral Dt/Tm	New	Muirhead,Brett
05/01/2019 15:03	♦	Mgr Auto-Referral	New	Muirhead,Brett
05/01/2019 15:03	♦	Mgr New Referral	New	Muirhead,Brett
05/01/2019 15:03	♦	MgrRef By Staff Rule	New	Muirhead,Brett

Record Key Name: [] Record Key Value: []

FALLOTH - Fall - Other [] New Value: [] Old Value: []

Print Back Compile

*Completing any or all of these sections it will reduce populated list of actions taken

Highlighting an action in the list will give you the details in the boxes below.

*Note: If you choose to filter by Data Field or Queries; you must change Include from "All" to "Selected" by using the drop-down arrow.

Assign Coverage

This function is used when a Manager/Leader will be off for vacation, leave, etc. and will ensure that incidents will be sent directly to the covering leader for investigation/follow up. Coverage can only be assigned when in Single Mode from the Menu bar.

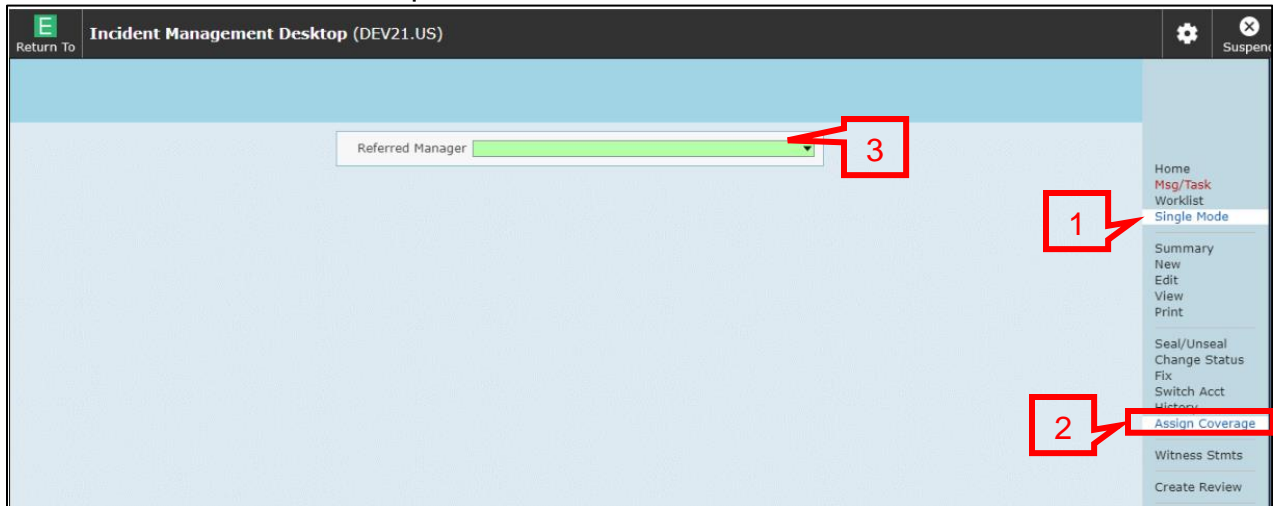
1. Click Single Mode
2. Click Assign Coverage

Quick Key Functions

T= Today, T-7=1 week ago, etc. N= Now (time) F9 = Opens Menu/List

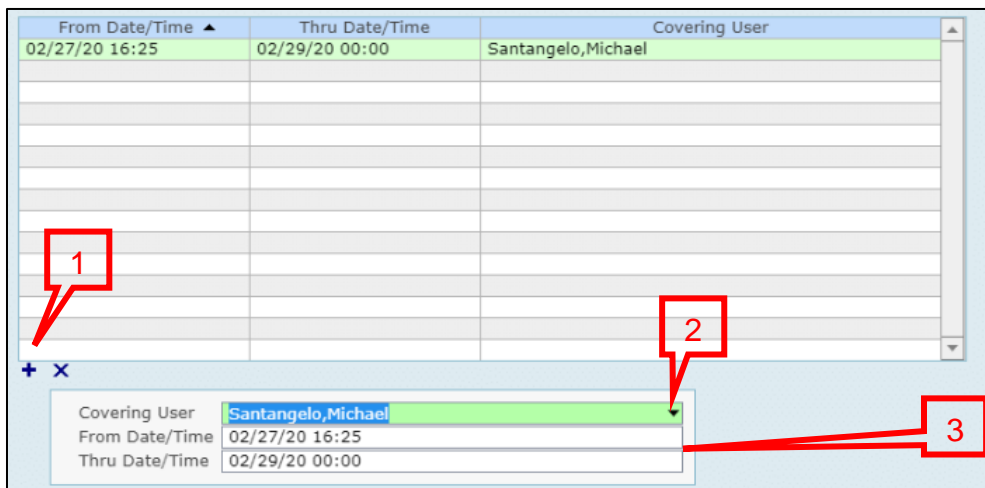


3. Referred Manager is the person requiring coverage (you); type the name in the field or select the name from the drop-down menu.



From the Assign Coverage Screen you will complete the following 3 steps:

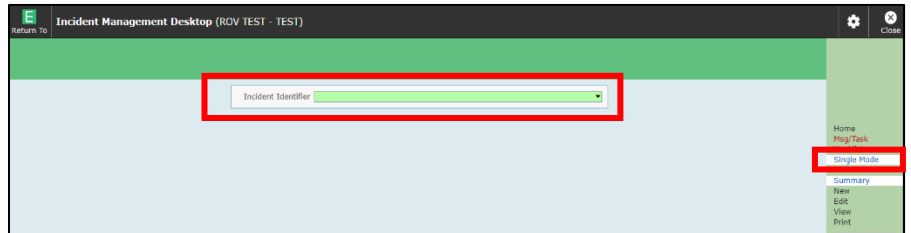
1. Click + to set a new coverage period.
2. Choose the Manager/Leader who will be covering in from the “covering user” drop-down or type in their name.
3. Enter the “From – Thru” date and time to set the coverage period and click save.



Opening a Completed/Closed Incident

In order to open an incident that has been closed do the following, starting in worklist view:

- ✓ Click on Single Mode
- ✓ Choose your search mode
- ✓ Enter the search criteria



- ✓ Click on the incident

By Visit | By Med Rec Num

Account Num: VD000009/20

Event Date/Time	Priority	Incident Number	Incident Type	Status	Sealed
14/07/2021 09:30		V2021-000216	Fall	In Process	No
14/07/2021 09:00		V2021-000215	Fall	In Process	No
05/07/2021 11:52		V2021-000210	Fall	In Process	No
05/07/2021 11:45		V2021-000208	Equipment/Device	In Process	No
05/07/2021 10:30		V2021-000209	Fall	In Process	No
05/07/2021 10:00		V2021-000212	Safety Security	In Process	No
04/07/2021 15:00		V2021-000213	RV Radiation Treatmnt Use ONLY	Complete	No
02/07/2021 15:00		V2021-000211	Fall	In Process	No
02/07/2021 11:09		V2021-000203	Fall	In Process	No
02/07/2021		V2021-000204	GV Concern	Complete	No
26/06/2021 12:00		V2021-000198	Treatment/Test/Procedure	Complete	No
26/06/2021		V2021-000202	Treatment/Test/Procedure	Complete	No
26/06/2021		V2021-000201	Treatment/Test/Procedure	Complete	No
22/06/2021 12:00		V2021-000197	Treatment/Test/Procedure	In Process	No
17/06/2021 10:14		V2021-000181	Medication/ Fluid	In Process	No
15/06/2021 11:41		V2021-000180	Fall	Complete	No
15/06/2021 09:05		V2021-000179	Fall	In Process	No
11/06/2021 09:58		V2021-000170	IL Pre Analytical Testing NM	In Process	No
09/06/2021 16:06		V2021-000169	Communication	In Process	No
01/06/2021 09:35		V2021-000157	Fall	In Process	No
14/05/2021 08:31		V2021-000149	RV Radiation Treatmnt Use ONLY	In Process	No
11/05/2021		V2021-000147	GV Concern	In Process	No

- ✓ Click Change Status
- ✓ Check off In Process
- ✓ Click SAVE

Current Status: Complete

Status
 In Process

By changing the status of a Completed Incident, the following field responses will be cleared:
 Completed Date/Time
 Completed By User
 Final Disposition
 Final Disposition Comment
 Referral Auto Completed
 Referral Completed Date/Time

Reason:

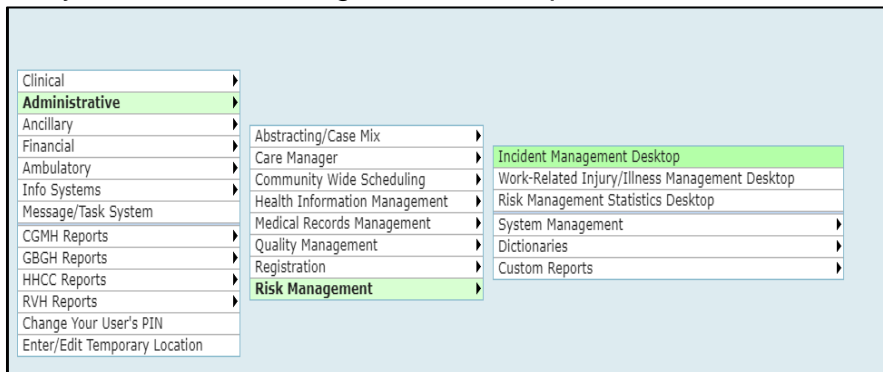
Quality of Care Review

Creating a Review

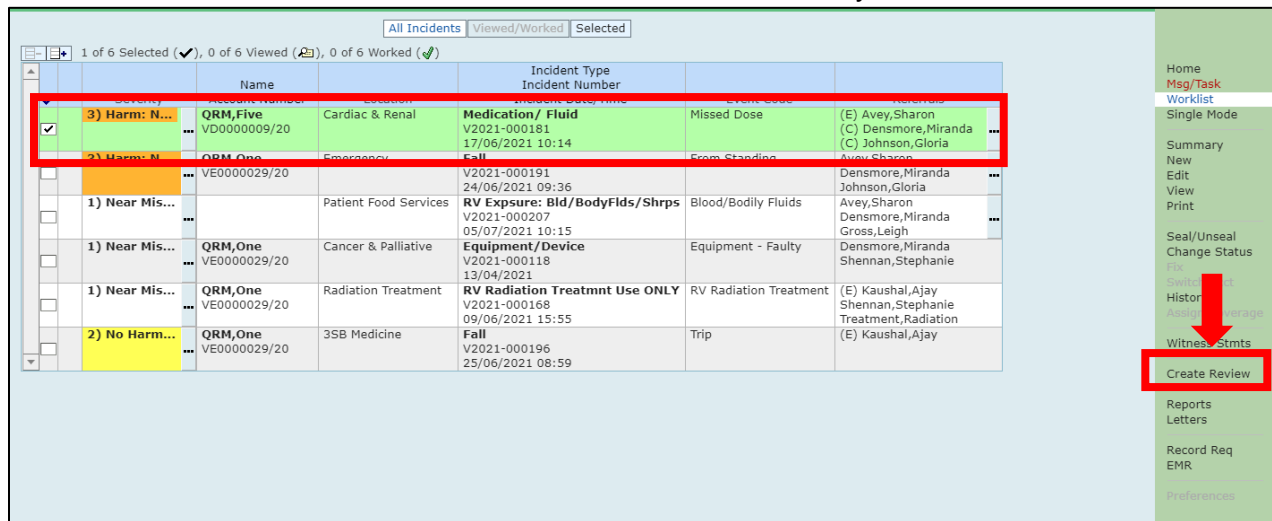
Via the Incident Management Desktop

A review can be created through the Incident Management Desktop as well as the Quality Management Desktop by clicking “New” on the right menu panel. However it is recommended that a Review is created from the Incident Management desktop as it will populate the incident number, location and event date/time, reducing the risk of error. NOTE: Do not start a review without notifying the Quality and Risk department within your organization.

1. Access your Incident Management Desktop



2. Select the Incident for review, click “Create Review” from your sidebar functions



3. Managers/Leader will complete the Initial Understanding of Facts section. Questions/fields with an * in front are required fields and must be completed before the review can be saved. Once saved this will send e mail notification to Quality and Risk Manager (QRM)/Quality Improvement & Patient Experience Coordinators (QIPEC).

Initial Understanding	
Note	Please Do Not Complete Until Quality and Risk Has Been Made Aware.
RM Incident Number	V2021-000181
RM Incident Location	Cardiac & Renal
*Event Date/Time	17/06/2021 10:14
*Has disclosure occurred with patient and/or family?	Yes No
*Has patient and/or family asked for additional follow up?	Yes No
Details of F/U with Family	
*Location of Patient at time of incident?	Comment:
Location of Patient at time of incident discovery(if diff)	Comment:
*** Additional Information From Staff Follow Up ***	*** Interview the staff who were on shift, working with the patient to understand the details of the incident ***
*How did the incident happen?	
*When did staff respond?	
*How did staff respond?	
*Describe patient current status	
*Relevant Diagnosis?	
*Coroner Notified?	Yes No
List of Participants to be Included in Review	

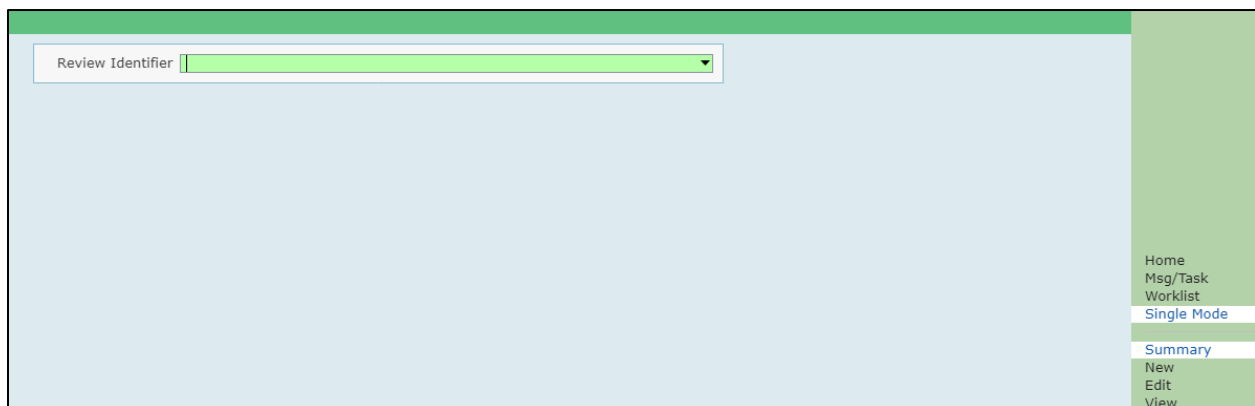
Via the Review Management Desktop

Review Management desktop is access through the Quality Management module. It is recommended that a Quality of Care review is only created this way when a review must be started prior to the incident being entered into the IMS.

1. Click Quality Management on your main Meditech menu and select Review Management Desktop



2. In the Review Management Desktop select Single Mode and then select New



3. Facility should auto populate if you have access to one facility – if you have access to more than one facility please choose your facility using the drop-down arrow

Facility

Review Type

Account Identifier

1. Search for the patient using any of the following Identifiers:

- Name
- Account Number
- Med Rec Number
- EMR Number

Name

Account Num

Med Rec Num

EMR Number

From the displayed matches, select the patient/incident that you want to start the review for.

Name

Account Num

Med Rec Num

EMR Number

Partial Name matches

Name	Birthdate	Account Num	Type	Date	Location	Med Rec Num
QRM,two	02/02/2000	ME0000003/20	REG ER	21/08/2020	M.ER	M000000363

Accessing a Review

From Review Management Desktop.

1. Click Quality Management on your main Meditech menu and select Review Management Desktop

Clinical

Administrative

Ancillary

Financial

Info Systems

Message/Task System

CGMH Reports

Change Your User's PIN

Enter/Edit Temporary Location

Quality Management

Risk Management

Review Management Desktop

Custom Reports

2. Your home screen will have different worklists:
 - My Referrals: reviews that have been created by QRM/QIPEC/Manager (QRM and QIPEC's will be auto referred when Managers start a review, when QRM/QIPEC starts a review, Managers have to referred manually – use the drop-down arrow and select appropriate Manager)
 - Recently Accessed: any review that you have recently opened/accessed
 - Review Criteria: allows you to custom compile a list of reviews based on date/facility/ review status
3. Worklist will show all the active/open reviews, select or highlight the review you want to access. View allows you to view the incident (this option will not let you edit) or choose edit if you want to add notes etc.

0 of 6 Selected (✓), 0 of 6 Viewed (A), 0 of 6 Worked (✓)

Name	Account Number	Current Location	Review #	Severity	Event Date/Time	Review Type	Status	Referral(s)
<input checked="" type="checkbox"/>	QRM,One	VE0000029/20	V2021-000001		20/05/2021 15:57	QCR	In Process	Avey,Sharon Johnson,Gloria Kaushal,Ajay
<input type="checkbox"/>	QRM,One	VE0000029/20	V2021-000004		14/06/2021 16:21	QCR	In Process	Avey,Sharon Johnson,Gloria Kaushal,Ajay
<input type="checkbox"/>	QRM,One	VE0000029/20	V2021-000007		16/06/2021 13:09	QCR	In Process	Avey,Sharon Johnson,Gloria Kaushal,Ajay
<input type="checkbox"/>	QRM,One	VE0000029/20	V2021-000008		30/06/2021 11:46	QCR	In Process	Avey,Sharon Johnson,Gloria Kaushal,Ajay
<input type="checkbox"/>	QRM,One	VE0000029/20	V2021-000010	DHARMSVCR	07/07/2021 11:25	QCR	In Process	Avey,Sharon Johnson,Gloria Kaushal,Ajay
<input type="checkbox"/>	QRM,One	VE0000029/20	V2021-000011		07/07/2021 12:16	QCR	In Process	Avey,Sharon Johnson,Gloria Kaushal,Ajay

Home
Msg/Task
Worklist
Single Mode
Summary
Edit View
Print
Change Status
Fix
Switch Act
History
Assignment
Peer Review
Staff Involved
Reports
Letters
Record Req
EMR
Preferences

4. When the review is ready to be closed, under Outcome, select the final outcome, this will give you a message that selecting the outcome will set the review to “complete” status, choose Ok and select save. This review will fall off the worklist.

Outcome	*Active	Last Edit Dt/Tm	Last Edit User	Comment
<input type="text" value=""/>	<input type="checkbox"/>			

Outcome Lookup

Search

	Name	Mnemonic
<input checked="" type="checkbox"/>	Goals Achieved	GA
<input type="checkbox"/>	Issue Resolved	IR
<input type="checkbox"/>	Issue Unresolved	IU
<input type="checkbox"/>	Process/System Change	PC

Message

Entering a final outcome sets the review status to 'Complete'.
All open referrals will have their completed date/time set.

Accessing a Completed/Closed Review

1. From your review desktop choose Review Criteria

List	Last Accessed/Saved	Status
General Worklists		
Account Selection File		
Recently Accessed	04/08/2021 17:27	0 Reviews
Review Criteria		
Review Manual List		
Review Selection File		
Saved Worklist		
Daily Worklists		
Department Assignments	02/07/2021 15:07	2 Reviews
My Referrals	04/08/2021 17:29	6 Reviews
My Saved Worklists		

2. Choose Status Complete. As an option you can choose your date range, facility, location (if you have access to more than one location) and then choose “Compile” from the bottom of the screen.

Review Criteria

Population Category
 Patient
 Nonpatient

Status
 In Process Inactive
 Assigned Cancelled
 Complete Pending

From Event Date: _____
 Thru Event Date: _____

Criteria Selection

Facility	All
Location	All
Review Type	All
Responsibility	All
Referral	All
Assignment Department	All

Facility: _____

Buttons: [Criteria](#) [Compile](#) [Print List](#)

3. You will now see a list of Completed reviews. Select the appropriate review and then utilize the side bar function “Change Status”

0 of 4 Selected (✓), 0 of 4 Viewed (A), 0 of 4 Worked (✓)

	Name	Account Number	Current Location	Review #	Severity	Event Date/Time	Review Type	Status	Referral(s)
<input checked="" type="checkbox"/>	QRM, Five	VD0000009/20	Cardioversion Clinic	V2021-000003		11/06/2021 14:49	QCR	Complete	Avey, Sharon Johnson, Gloria Kaushal, Ajay
<input type="checkbox"/>	QRM, One	VE0000029/20	Emergency	V2021-000002		31/05/2021 09:59	QCR	Complete	Avey, Sharon Johnson, Gloria Kaushal, Ajay
<input type="checkbox"/>	QRM, One	VE0000029/20	Emergency	V2021-000006		15/06/2021 14:42	QCR	Complete	Avey, Sharon Johnson, Gloria Kaushal, Ajay
<input type="checkbox"/>	QRM, One	VE0000029/20	Emergency	V2021-000009		05/07/2021 09:21	QCR	Complete	Avey, Sharon Johnson, Gloria Kaushal, Ajay

Side Bar Functions:
 Home
 Msg/Task
 Worklist
 Single Mode
 Summary
 New
 Edit
 View
 Print
Change Status
 Switch Act
 History
 Assignment
 Peer Review
 Staff Involved
 Reports
 Letters
 Record Req
 EMR
 Preferences

4. To change the status of the review from “Complete” to “In Process” go to the “Outcome” section and simply remove the date and time, this will give you a message that will set the review from “Complete” to “In Progress”, select save.

QRM,One 21/08/2020 11:31 - VEO000029/20 V00000449
 REG ER RV.MAIN QCR Event Date/Time: 05/07/2021 09:12 V2021-000009

Review Number	Status	Type	Event Date	Subject Map	Name	Acct Num
<input checked="" type="checkbox"/> V2021-000009	Complete	QCR	05/07/2021	Patient	QRM,One	VE0000029/20


1 of 1 selected reviews will be changed to In Process

Status
 In Process

By changing the status of any Completed Reviews, the following field responses will be cleared:
 Completed Date/Time
 Completed by User
 Completing User's Referral Completed Date/Time
 Any active Final Outcomes will be changed to not active.
 If the outcomes are still applicable to the review, change the Active field to Yes when completing the review again.

Reason

Return to List Cancel Save



The review will now appear on your Review Management Desktop's Worklist.