

Incident Management (NON-APS): Nursing Homes

Louisiana Department of Health (LDH) Training Guide

Incident Management (Non-APS)

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Incident Management (Non-APS)

Statewide Incident Management System (SIMS) maintains incident records for participants/victims/patients who are served by LDH.

Introduction	This training introduces you to the basic functions of adding and maintaining incident records for Nursing Homes.
Importance	Your confidence in using SIMS for processing, follow-up/investigation and reporting workflows will increase as you develop proficiency in the software.
Overview	To help the Louisiana Department of Health develop the necessary skills and understanding to effectively use SIMS to perform the reporting workflows in a Critical Incident Reporting context.
Objectives	<ul style="list-style-type: none">• Log into and out of SIMS• Successfully navigate the program• Understanding Ticklers, Dashboards, Workflow Wizards, Alerts, Forms, Word Merges and Reports• Following the steps in the guide, accurately enter an Incident record

Topics	Topic	Page
	Initial Incident Entry workflow	16

Icons Used in this Manual

Icon	Description
	<p>Tip Tips provide general recommendations on how to make it easier or more productive to use SIMS.</p>
	<p>Caution The Caution icon highlights areas of note or concern, where failure to use the system properly may cause or exacerbate problems.</p>
	<p>Note Notes provide additional information of general interest about a specific function or process of SIMS.</p>
	<p>Example Examples are provided to help you develop a better understanding of the subject area and how SIMS may be used in a specific scenario of relevance.</p>

SIMS Basics

SIMS is a web-based system that is accessed from a Web browser, specifically Microsoft Edge and/or Google Chrome. Your workstation will be configured before you “go live” to allow the system and all its functionality to operate properly. If you experience any problems during training or after “go live”, please coordinate with your System Administrator to evaluate the issue.

Enabling Pop-Up Windows

SIMS uses pop-up windows to display information to users. It is important to allow these pop-ups to be displayed on your screen.

To enable pop-up windows In **Microsoft Edge**, follow these steps:

1. **Open Edge** on your computer.
2. Go to **Settings and more** at the top of your browser.
3. Select **Settings > Cookies and site permissions**.
4. Under **All permissions**, select **Pop-ups and redirects**.
5. Turn on the **Block (recommended)** toggle.

To enable or configure pop-up blocking in **Google Chrome**, follow these steps:

1. **Open Chrome** on your computer.
2. Click the three dots in the upper-right corner to access the menu, then select **Settings**.
3. In the left-side navigation menu, click **Privacy and security**.
4. Scroll down and choose **Site settings**.
5. Under **Pop-ups and redirects**, you have a few options:

To set your **default behavior**, click the toggle switch to allow or block pop-ups.

In the future when you try to access SIMS from a workstation that is not your own, the default set up on the workstation may enable some other type of pop-up blockers (Google™, Yahoo®, MSN®, etc.). Be sure to follow the instructions to allow the use of pop-up windows.

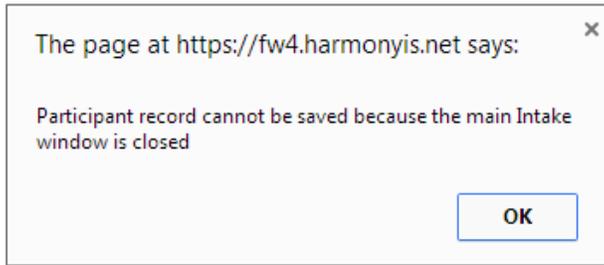
The specific steps you need to take may vary depending on the version of IE you are running. Check with your System Administrator whenever you are unable to resolve this issue on your own.

Screen Stacking

In SIMS, you will do a lot of opening and closing of screens (windows). As you’re working, you can have many screens open and not know because they’re stacked on top of each other. There is no harm in this, but it can make working in SIMS more cumbersome. Open screens can prevent you from getting to another area of the program. On the other hand, closed screens can also prevent you from moving around.

If a screen has been closed, but should have remained open, you’ll see an error message similar to this:

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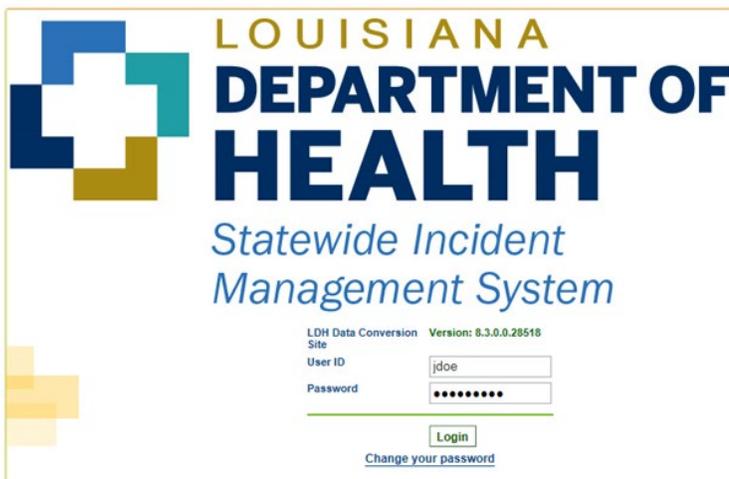
Best Practices recommend that you click **File > Save and Close** when you're saving records. This prevents unnecessary screens from staying open.

Log into SIMS



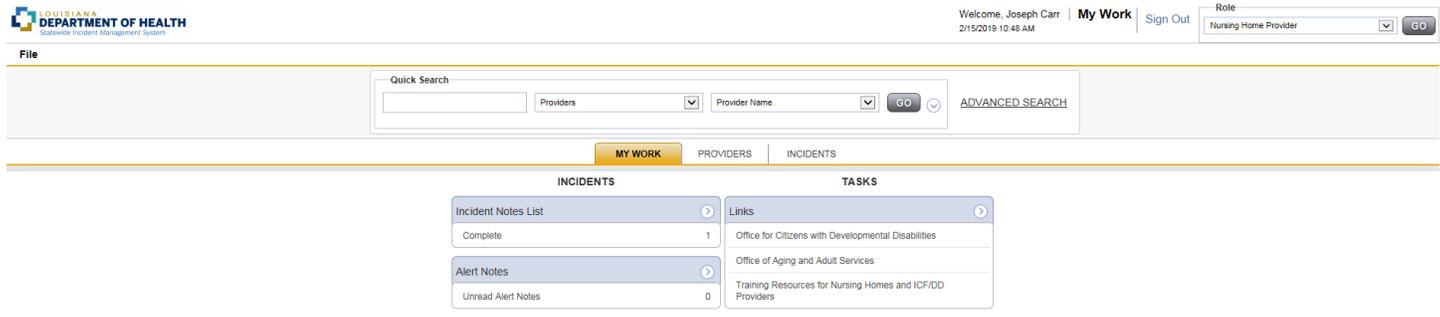
Your SIMS Application Administrator will provide you with the URL (Internet Address) of the WellSky Customer Portal and your login credentials for both the Sandbox Environment and the Live system when appropriate.

1. Open Microsoft Edge or Google Chrome and then enter the URL for SIMS
2. At the login, type your **User ID** and **Password**
3. Click **Login**



- a. The **Dashboard** is displayed

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Exit SIMS

To exit SIMS:

1. In the upper right portion of the screen, click **Sign Out**

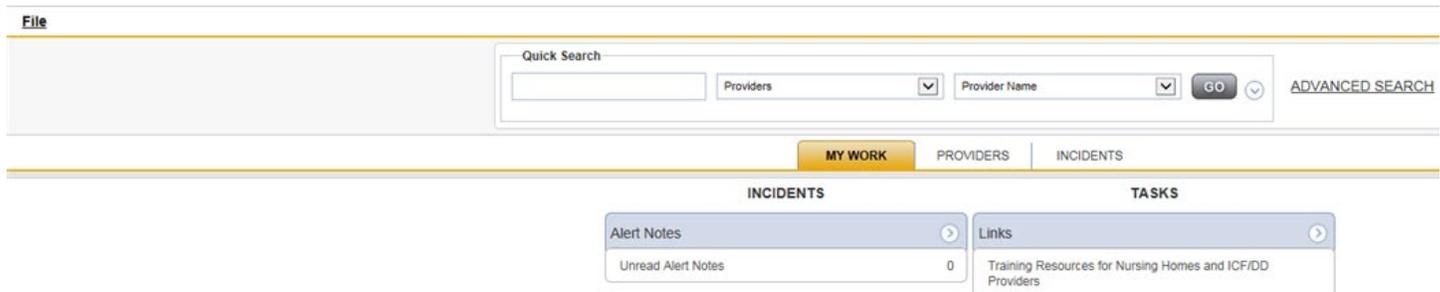


My Work

My Work ¹ is your home page and tasks might be managed. When you first log in, you will begin from here. Keep in mind that your **My Work** page may differ from that of your co-worker. Roles determine which features you may have.

My Work Screen Elements

There are several parts of the **My Work** screen, as shown in the ⁴ screenshot below: ⁵



1	The File menu is located throughout the program. Items on the File menu vary, depending on what you are doing. Some of the more common functions you'll use is the File > Add Notes and File > Save and Close Notes .
2	The tabs along the top of the screen are called Chapters . A chapter is like a section of the program. To move to another chapter, just click it. If you have the "UTILITIES" Chapter, let your supervisor know immediately. This chapter is reserved for IT.
3	My Work is divided into areas for consumers, providers, and tasks. You may see all or just some of these areas.
4	Within each area are boxes that contain information. These are referred to as Panes .

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5

Each pane includes a down arrow. When you click the down arrow, items in the pane are collapsed. This is helpful if you need more space on your screen. To expand the items in the pane, click the now right-facing arrow.



Many areas of the program allow you to collapse sections (panels). Click the down arrow in the circle . When you click it, it becomes a right-facing arrow .

Activities

Within each Pane on the My Work homepage, numbers will be visible next to different items. These numbers will represent a note that was written to you. For example, in the screenshot below, one can see there is a note assigned to them under the Incident Notes Pane.

The screenshot shows the 'MY WORK' tab selected. Under 'INCIDENTS', there are two panes: 'Incident Notes List' with a right arrow and the number '1' next to 'Complete', and 'Alert Notes' with a right arrow and the number '0' next to 'Unread Alert Notes'. Under 'TASKS', there is a 'Links' pane with a right arrow, listing 'Office for Citizens with Developmental Disabilities', 'Office of Aging and Adult Services', and 'Training Resources for Nursing Homes and ICF/DD Providers'.

1. To display the note, click on "Complete" status in the Incident Notes List pane. A new window will open with a grid.

The screenshot shows the 'Incident Notes List' window. It has a header with 'LOUISIANA DEPARTMENT OF HEALTH Statewide Incident Management System', 'Welcome, NH Provider 2/11/2018 9:55 AM', and 'Incident Notes List'. Below the header is a 'File' section with a 'Filters' box containing 'Status', 'Equal To', 'Complete', and 'AND' dropdowns, and a 'Note Date' field with a '+' button. Below the filters is a 'Search' and 'Reset' button. The main content is a table with 2 records:

Note Date	Note By	Note Type	Status
12/05/2017	Guglielmo, Barbara	Request for Additional Information	Complete
12/05/2017	eighty, tester	CNA Additional Information Needed	Complete

2. To open the note, hover your mouse over the note in the list view grid and click on it. You will be navigated to the note details page.

The screenshot shows a web application interface for the Louisiana Department of Health's Statewide Incident Management System. The main content area displays a 'Notes Details' form for an incident. The form includes the following fields and values:

- Incident ID: 13852017
- Date Reported: 13852017
- Note Date: 13852017
- Note Type: (Dropdown menu)
- Status: Complete
- Date Completed: 13852017

Below the form, there is an 'Attachments' section with a table:

Document	Description	Category	Action
Click Case Request for Additional Information.pdf	Word Template: CHA Case Request for Additional Information		

At the bottom, there is a 'Notes Recipients' table:

Name	Date Sent	Date Read	Status	Date Signed
Provider: MI	13852017		Unread	

Navigating the Application

This section provides a brief overview and some tips for working in the application.

Chapters

Chapters are links to different areas of SIMS. Authorized users can access chapters at any time by simply clicking the desired Chapter button (or tab) across the top of the screen. Note that not all workers can see all the listed chapters. Your view may differ from the example below. (Remember, every Role will have different Chapters. If you have the “UTILITIES” Chapter, let your supervisor know immediately. This chapter is reserved for IT.)



Chapter	Definition
Incidents	Contains information about every incident. This includes the patient and provider involved, the incident reporting form and notes.
Providers	Contains information about every individual or agency that provides a service to a consumer. It also contains information about the workers associated with a provider.

File Menu Bar

The File menu bar is displayed throughout the application and is located in the upper left corner of the screen. Depending on the screen that’s open, other menus may be displayed. This is the location where you’ll go to create or add files, close and save files and print files, among other functions.

Additional functions remain available under each option. Hovering above each **File Menu** bar category will expand additional menus. Access to these are granted based on the permissions which are driven by roles.



When users scroll through a page in SIMS, the **File Menu** header is frozen so that users will always be able to access these **File Menu** functions no matter where the cursor is located on the page.

- **File** – Contains the functions to add a new record or to view history changes to the data in view.
- **Edit** – Provides the ability to make changes to the data included in the record.
- **Tools** - Provides the user with additional functionality based on the page currently in view.
- **Reports** – Lists standard reports built into the WellSky software. Additional reports may be available to certain roles or groups. If a user has access to the Reports Menu, click the menu and select the report and it will open in a new window.
- **Word Merge** - Lists documents that have been uploaded to the application using the **Word Merge** Utility and are available to certain roles and groups. If a user has access to the **Word Merge** File menu, to access the document, click the file menu and select the document and it will open a new window.

INCIDENTS Tab

When you chose the Incidents Tab, your page will look very similar to the screen below. It will not automatically display a list of incidents.

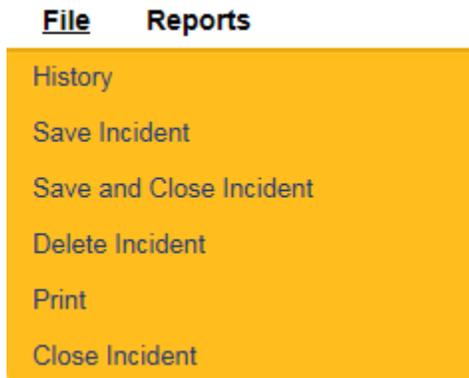
You will need to select filters to retrieve your incidents. (For example, below, the user wants to retrieve incidents reported after December 23, 2019 and the status equals Pending.)

Enter your search criteria in the Filters section and choose the **Search** button. You will retrieve only the incidents matching your search criteria. You will only be able to see items that are permitted by security settings for your User ID.

WARNING: (I strongly **suggest** you **do not** filter Status = Completed **only**.)

Incident Records: File Menu

As you are working with incident records, you will save and close records. This is done on the **File** menu, located near the top of your screen. The **File** menu options change, depending on what you're doing; the screenshot below displays what the **File** menu might look like. Some examples include and are not limited to: **Save**, **Save and Close**, **Print**, and **Add Incidents**.



The table below describes some of the **File** actions you'll work with as you are creating an incident record.

File Menu	Description
History	Allows user to view history changes to the data in view.
Save	Saves changes since the last save and keeps the record open. Saving a record can be done at any time.
Save and Close	Saves changes since the last save and closes the record.
Print	Allows user to print the information on the current screen.
Delete	Allows user to delete the record permanently.
Close	Closes the record without saving any recent changes.

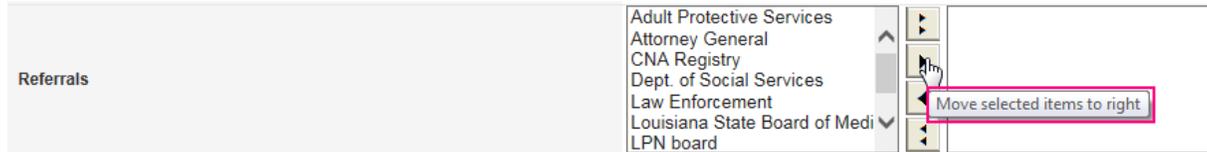


When you need to add, remove or save files, the **File** menu is the place to go. An example in the directions could appear as: go to **File > Save and Close Notes**. Closing a window by clicking on the "X" in the top right-hand corner of the window is not recommended. Information may be lost.

Multi Select Boxes

Using the Arrow Buttons

Some areas of the application require you to select items from a list, and move them from one field to another, using arrow buttons. If you hover over one of the arrow buttons, a tooltip is displayed that describes what the button does. In the screenshot below, the mouse was hovering over the button to move selected items to the right.



Buttons	Definition
▶	Move all items from the left to the right
▶	Move selected items from the left to the right
◀	Move selected items from the right to the left
◀	Move all items from the right to the left

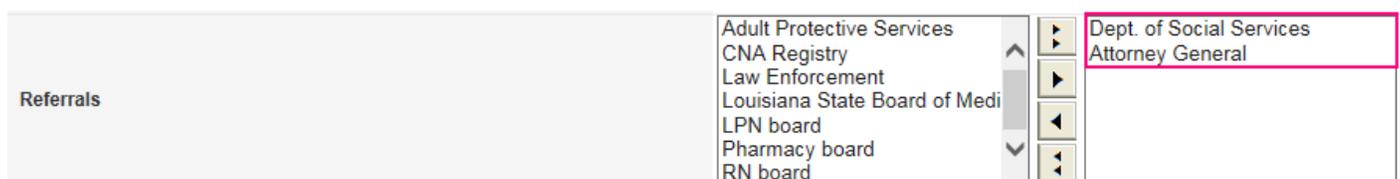
Using the Shift and Ctrl keys

If you want to select more than one item, and the items are *all together*, press and hold the **Shift** key on your keyboard and select the first and last records in the group. Then, click the right-facing button to move all items to either the right or left field.

If you want to select more than one item, and the items are *not together*, press and hold the **Ctrl** key on your keyboard and click the records you want. Click the right-facing button to move the items to either the right or left field.

Example

In the screenshot below, the incident is being referred to the Dept. of Social Services and the Attorney General. You could either select each item from the left side and click the right-facing arrow to move them to the right or use your **Ctrl** key to select both items at the same time and then click the right-facing arrow.



List Views and Search Filters

In various areas of the SIMS, records may appear on a **List View** screen. These screens limit the number of records returned at one time.

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Filters

Incident ID

1 Queue Search record(s) returned - now viewing 1 through 1

Incident ID	Report Received Date	Report Received Time	Disposition	Status	Provider Name	Victim First Name	Victim Last Name
153	02/01/2018	6:28 AM	Pending	Pending	4-B Group Home		

<< First < Previous Retrieve 15 Records at a time Next > Last >>

List View screens allow you to quickly retrieve a desired record. If the desired record is not displayed on the initial list view, you can click on one of the following buttons to scroll through the returned records:

Button	Description
	Jumps to the first record in the list
	Jumps button jumps to the previous record in the list
	Jumps to the next record in the list
	Jumps to the last record in the list



Tip

You can also modify the number of records returned in the list view by entering the desired number in the "Retrieve [15] records at a time" field and then clicking on one of the record search buttons (i.e., First, Previous, Next, Last).

You may sort the records by ascending or descending order by clicking on the column headers in the list view.

Advanced Search

The Advanced Search function allows you to look for existing data. There are multiple options and an expanded range of input variables for detailing your criteria to find the records you need.

To search for an Incident record using the **Advanced Search** function, take the following steps:

Quick Search

incidents

MY WORK PROVIDERS **INCIDENTS**

Filters

Incident ID

15 Queue Search record(s) returned - now viewing 1 through 15

Incident ID	Report Received Date	Disposition	Status	Provider Name
335	11/26/2018	Pending	Pending	
329	11/26/2018	Pending	Pending	
313	11/15/2018	Pending	Pending	

1. Click the **Advanced Search** link.
 - a. The Advanced Search window is displayed.
2. Once you have entered your search criteria in the Filters section, click **Search**.

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3. The system displays all items matching the search criteria you defined.



Note

You will only be able to see items that are permitted by security settings for your User ID.

Advanced Search Window

Each filter allows you to select from the following comparison search criteria:

Term	Definition
Equal To	Returns records that match the entered criteria. For example, if <Last Name> is entered as “equal to” a specific person’s name, the Consumer records assigned to that Worker will be returned.
Begins With	Returns records that begin with the entered criteria. For example, if <Last Name> is entered as “begins with” ‘T’ the system will return records assigned to the Worker having last names that start with ‘T’, such as Tester and Thomas.
Ends With	Returns records that end with the entered criteria. For example, if you search on <Last Name> “ends with” ‘r’, you can retrieve records where a Consumer’s name ends in ‘r’, such as Tester.
Not Equal To	Returns records that do not match the entered criteria. For example, if a particular name is entered for <Last Name> , the system will return a list of records except those records for the name provided in the search criteria.
Greater Than	Returns records that are dated later than the entered criteria. For example, if <DOB> is entered as “greater than” ‘03/01/2015’, the system will return all records with a record whose date of births are after March 1, 2015.
Less Than	Returns records that are dated earlier than the entered criteria. For example, if <DOB> is entered as “less than” ‘03/31/2015’, the system will return data for all records with a birth date before March 31, 2015.
Contains	Returns records that contain the entered criteria. For example, if <Last Name> is entered as “contains” specific values in the person’s name, the Consumer Record(s) assigned to that worker with those values would be returned.
Blank	A record is returned where the selected field does not have a value in the field.
Non-Blank	Returns records where the selected field does have a value in the field.

Boolean Logic

In addition, you can search on these filters using Boolean (**and/or**) logic:

- **AND** - Tightens your search: records returned only if meeting ALL criteria.



Example

Find Consumers where **<DOB>** is greater than (>) March 1, 2000 and **<DOB>** is less than (<) June 30, 2015. This returns all reports dated between the two dates entered.

- **OR** - Broadens your search; records returned if meeting EITHER criteria:



Example

Find records where **<Last Name>** equals **<Jones>** or **<DOB>** = “**June 22, 1998.**” The system returns records for Jones regardless of date of birth, **and** also returns any consumer records whose birth date is 06/22/2015.

Once you have entered your search criteria, click the **Search** button or you can tab to the **Search** button using your **Tab** key and press **Enter**.

The system displays all items matching the search criteria you defined.



Note

You will only be able to see items that are permitted by security settings for your User ID

Did your search return the expected results? If not, click the **Reset** button to clear your criteria. Reconsider your filters and try again.

Common Functions

Throughout this training guide, some functions are performed multiple times. Rather than describing the complete function each time, the steps to perform the function are included in this section, with a reference to this section in the instruction.

Switching Roles

Throughout the application, you may use many different Roles. Roles define a set of capabilities you have within SIMS, and each Role performs different functions. A Role change is indicated by the following symbol and instruction:



Switch Role to **Nursing Home Provider**

Private Medicaid/Medicare Licensed Nursing Homes serve persons who, because of illness or physical infirmity of age, are unable to properly care for themselves. Their workflow is described below.

Initial Incident Entry Workflow

The Incident Workflow begin with the discovery of a reportable incident.



Role = **Nursing Home Provider**

1. Click the **Providers** chapter. If your user account is only associated with one provider, the provider record should open automatically exposing the provider details (see picture in step 3 below).



2. If you are associated with more than one provider and it is not listed then you will need to search for it. Click the **Search** button to search for the provider if you do not see it listed.

Filters

Active Equal To Yes AND

Provider ID

3. Select your Provider from the **List View** grid which will open the Provider record.

MY WORK **PROVIDERS** INCIDENTS

(The) (12104)

Providers Divisions Workers Enrollments

Basic Information

Provider/Agency Name	(The)	Active	Yes
State ID	NH0002590	Provider Type	Nursing Homes

Contact Information

Contact Name	MR	LDH Region	2
Street	10145 Florida Blvd.	Parish	EAST BATON ROUGE
City	BATON ROUGE	Phone	(225)272-0111
State	LA	Fax Number	(225)275-3437



Note

If the user is associated to one Provider record, the record will automatically open. The list view grid will only appear if the user is associated to more than one Provider.

4. Click **File > Add Incidents**

File Edit

Print

Add Incidents

Add Incident Screen – starting an Incident record

1. Complete all fields. (*Fields with * are required.*) Disposition and Status will default to “Pending” until final completion of report.

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Event Information	
Division	INC
Entry Date *	02/15/2019
Entry Time *	10:54 AM
Report Received Date *	02/15/2019
Report Method	
Report Type *	Nursing Home
Report Made By *	NH, Reporter
Name of Reporter *	
SIMS Facility ID *	12159 <input type="button" value="Clear"/> Details
Facility Name *	(The)
Incident Occurred	
Incident Occurred Time	
Incident Discovered *	
Incident Discovered Time *	
Incident Description *	<div style="border: 1px solid #ccc; height: 100px;"></div> <p>7000 characters remaining</p>
Referrals	<div style="border: 1px solid #ccc; padding: 5px;"><ul style="list-style-type: none">Adult Protective ServicesAttorney GeneralCNA RegistryDept. of Social ServicesDSW RegistryLaw EnforcementLouisiana State Board of Medi</div>
Due Date	
Facility Details	
Street	11188 Florida Blvd.
Street 2	
City	BATON ROUGE
State	LA
Zip Code	70815
Parish	EAST BATON ROUGE
Decision	
Disposition *	Pending
Status *	Pending
Law Enforcement Parish *	<input type="button" value="Clear"/>

2. Click File > Save Incident.

Add Victim

1. Saving the Incident record will expose subpages that will help you complete the Incident record.
2. Click on the Victim subpage and click on Add Participant in the SIMS toolbar. Select **Victim Participant** from the dropdown list.

File **Add Participant**

Incident **Victim Participant**

Victim

Accused/Witnesses

Notes

Disposition History

- This will open the Victim details page. Click on Tools in the toolbar and select **Search for Person** in the dropdown menu.

File **Tools**

Search For Person

Victim

Salutation	
First Name *	
Middle Name	
Last Name *	
DOB *	
Age	
Gender	
Race	
SSN *	
Marital Status	
Injury	
Type of Injury	<ul style="list-style-type: none"> Bruise Burn Death Finger-marks/Hand prints Fracture Laceration Redness
Protective Actions *	<ul style="list-style-type: none"> 1-on-1 Supervision Admitted to Behavioral/Psychi Admitted to Hospital Counseled Evaluated in ER Examined by Medical Staff None
Primary	<input checked="" type="checkbox"/>
SIMS No	

- The People Search window will open. You can either use the Search box or the filters to set your search query.



Note

Typing a value in the Search box will ask the system to search the value in all fields. Using the filters will help narrow your search by specifying which field you want to use in your query.

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Search
morgan Help

Apply Filter to Search Search Reset Show Filter

Filter
Partial Contact Information Equal To AND x

Last Name + Search Reset Hide Filter

Search Results for Harmony People

Last Name	People ID	First Name	Middle Name	Suffix	DOB	Gender	Race	SSN	Contact ID	Member ID	Case No	Person Type	Date of Death
M	27374	S			1990		White	XXX-XX-8806				Consumer	

5. If your search results in a match, click anywhere on the record in the list view grid.
6. A dialog box will pop up, asking you how you would like to attach the selected record.

Overwrite Participant Data: Data on the Victim record will be replaced with data from the selected people record.

Link to Participant: Empty fields on the Victim record will be populated with data from the selected people record and then will be appended to the selected people record.

How would you like to proceed?

Overwrite Participant Data

Link to Participant

Cancel and Return to People Search Grid

OK

7. Click OK. The People Search Window will close, and you will be brought back to the Victim Details Page. The Victim record that you selected should now appear on this page.
8. Be sure to complete all required fields.

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Victim																
Salutation	Mr. ▾*															
First Name *	Last Name															
Middle Name	Middle Name															
Last Name *	First Name															
DOB *	11/07/1985															
Age	33															
Gender	Male ▾															
Race	White ▾															
SSN *	XXX-XX-9454															
Marital Status	Single ▾															
Injury	Yes ▾															
Type of Injury	<table border="1"> <tr><td>Burn</td><td>▶</td><td rowspan="6">Bruise Laceration</td></tr> <tr><td>Death</td><td>▲</td></tr> <tr><td>Finger-marks/Hand prints</td><td>▶</td></tr> <tr><td>Fracture</td><td>▶</td></tr> <tr><td>Redness</td><td>◀</td></tr> <tr><td>Scald</td><td>◀</td></tr> <tr><td>Scratch</td><td>◀</td></tr> </table>	Burn	▶	Bruise Laceration	Death	▲	Finger-marks/Hand prints	▶	Fracture	▶	Redness	◀	Scald	◀	Scratch	◀
Burn	▶	Bruise Laceration														
Death	▲															
Finger-marks/Hand prints	▶															
Fracture	▶															
Redness	◀															
Scald	◀															
Scratch	◀															
Protective Actions *	<table border="1"> <tr><td>Admitted to Behavioral/Psychi:</td><td>▶</td><td rowspan="6">1-on-1 Supervision Evaluated in ER</td></tr> <tr><td>Admitted to Hospital</td><td>▲</td></tr> <tr><td>Counseled</td><td>▶</td></tr> <tr><td>Examined by Medical Staff</td><td>▶</td></tr> <tr><td>None</td><td>◀</td></tr> <tr><td>Notification of Responsible Pa</td><td>◀</td></tr> <tr><td>Other (See Notes)</td><td>◀</td></tr> </table>	Admitted to Behavioral/Psychi:	▶	1-on-1 Supervision Evaluated in ER	Admitted to Hospital	▲	Counseled	▶	Examined by Medical Staff	▶	None	◀	Notification of Responsible Pa	◀	Other (See Notes)	◀
Admitted to Behavioral/Psychi:	▶	1-on-1 Supervision Evaluated in ER														
Admitted to Hospital	▲															
Counseled	▶															
Examined by Medical Staff	▶															
None	◀															
Notification of Responsible Pa	◀															
Other (See Notes)	◀															
Primary	<input checked="" type="checkbox"/>															
SIMS No																

9. Click File > Save and Close Victim.

10. If your search does not generate any results, click File > Close People Search.

File

Close People Search

Kaplan [Help](#)

Apply Filter to Search Search Reset Show Filter

Filter

Partial Contact Information ▾ Equal To ▾ AND ▾ ✕

Last Name ▾ +

Search Reset Hide Filter

Search Results for Harmony People

Last Name	People ID	First Name
No records to display.		

11. You will be brought back to the Victim Details Page. Complete all the relevant information.

Incident Management (Non-APS)

Victim																	
Salutation	Mr. ▾*																
First Name *	Last Name																
Middle Name	Middle Name																
Last Name *	First Name																
DOB *	11/07/1985																
Age	33																
Gender	Male ▾																
Race	White ▾																
SSN *	XXX-XX-9454																
Marital Status	Single ▾																
Injury	Yes ▾																
Type of Injury	<table border="1"> <tr> <td>Burn</td> <td>▶</td> <td rowspan="6">Bruise Laceration</td> </tr> <tr> <td>Death</td> <td>▲</td> </tr> <tr> <td>Finger-marks/Hand prints</td> <td>▶</td> </tr> <tr> <td>Fracture</td> <td>▶</td> </tr> <tr> <td>Redness</td> <td>◀</td> </tr> <tr> <td>Scald</td> <td>▼</td> </tr> <tr> <td>Scratch</td> <td>▼</td> <td></td> </tr> </table>	Burn	▶	Bruise Laceration	Death	▲	Finger-marks/Hand prints	▶	Fracture	▶	Redness	◀	Scald	▼	Scratch	▼	
Burn	▶	Bruise Laceration															
Death	▲																
Finger-marks/Hand prints	▶																
Fracture	▶																
Redness	◀																
Scald	▼																
Scratch	▼																
Protective Actions *	<table border="1"> <tr> <td>Admitted to Behavioral/Psychi:</td> <td>▶</td> <td rowspan="6">1-on-1 Supervision Evaluated in ER</td> </tr> <tr> <td>Admitted to Hospital</td> <td>▲</td> </tr> <tr> <td>Counseled</td> <td>▶</td> </tr> <tr> <td>Examined by Medical Staff</td> <td>▶</td> </tr> <tr> <td>None</td> <td>◀</td> </tr> <tr> <td>Notification of Responsible Pa</td> <td>▼</td> </tr> <tr> <td>Other (See Notes)</td> <td>▼</td> <td></td> </tr> </table>	Admitted to Behavioral/Psychi:	▶	1-on-1 Supervision Evaluated in ER	Admitted to Hospital	▲	Counseled	▶	Examined by Medical Staff	▶	None	◀	Notification of Responsible Pa	▼	Other (See Notes)	▼	
Admitted to Behavioral/Psychi:	▶	1-on-1 Supervision Evaluated in ER															
Admitted to Hospital	▲																
Counseled	▶																
Examined by Medical Staff	▶																
None	◀																
Notification of Responsible Pa	▼																
Other (See Notes)	▼																
Primary	<input checked="" type="checkbox"/>																
SIMS No																	

12. Click File > Save and Close Victim.

Add Incident Report

The HSS Incident Report captures information on the Incident Category, Accused, and Witnesses.

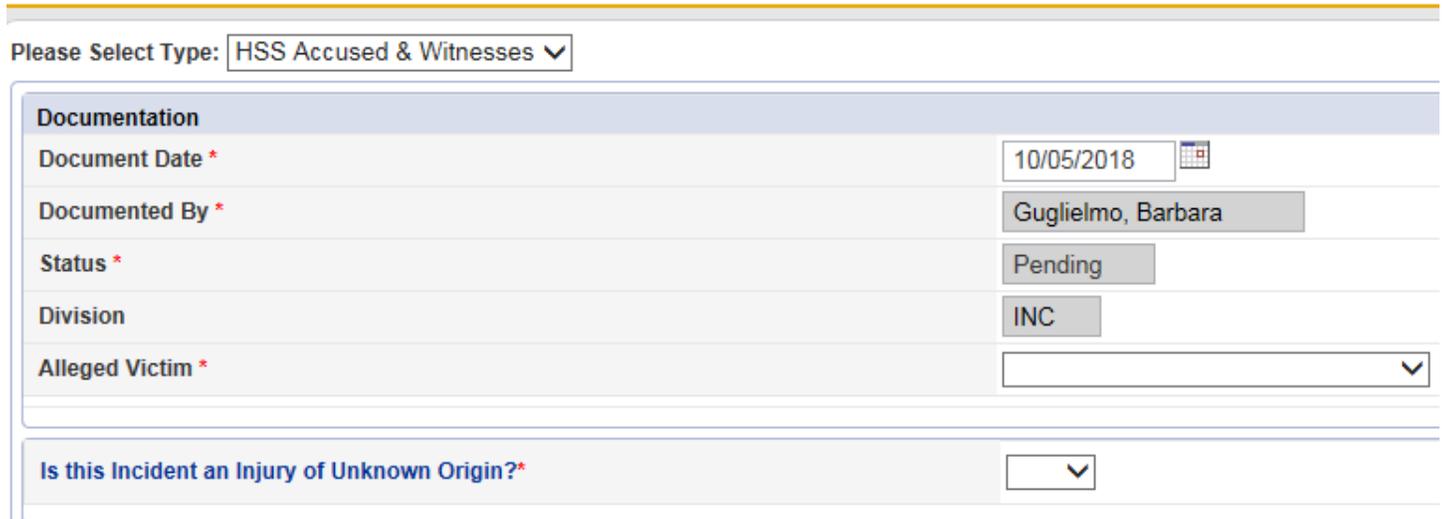
1. The Victim List page will appear on the screen.
2. Click on the Accused/Witnesses subpage.



The screenshot shows a vertical navigation menu with the following items: Incident, Victim, Accused/Witnesses (highlighted with a yellow box), Notes, and Disposition History.

3. Click File > Add Accused/Witnesses.
4. Select **HSS Accused & Witnesses** from the *Please Select Type* dropdown list.

File



The 'File' section contains a dropdown menu labeled 'Please Select Type:' with 'HSS Accused & Witnesses' selected. Below this is a 'Documentation' section with the following fields:

Document Date *	10/05/2018
Documented By *	Guglielmo, Barbara
Status *	Pending
Division	INC
Alleged Victim *	[Empty dropdown]

At the bottom of the section is a question: 'Is this Incident an Injury of Unknown Origin?' with a dropdown menu set to 'No'.

5. Select the Alleged Victim from the Participant dropdown list.

Injury of Unknown Origin

1. If the Incident is an Injury of Unknown Origin, indicate by selecting Yes.



The screenshot shows the question 'Is this Incident an Injury of Unknown Origin?' with a dropdown menu set to 'Yes'.

2. Two additional questions will display that need to be completed.

Incident Management (Non-APS)

Is this Incident an Injury of Unknown Origin?*	Yes ▾
Has a determination been made for an Injury of Unknown Origin?	Yes ▾
Allegation Finding:	<div style="border: 2px solid magenta; padding: 5px;">Substantiated Unsubstantiated Unable to Validate/Verify</div>

3. Select Save and Close Accused/Witnesses from the File menu.

Incident is Not an Injury of Unknown Origin

1. If the Incident is not an Injury of Unknown Origin, indicate by selecting “No”. Continue completing the rest of the report.
2. If the Accused is Unknown, indicate by selecting Yes.

ACCUSED	
Is Accused Unknown?	▾

3. 3 questions will appear to be completed, the Unknown Accused’s relationship to the Victim, the Unknown Allegation and if a determination has been made for the Unknown Allegation. *Please note that a question with a red asterisk is required.*

Unknown Accused Relationship:*	▾
Unknown Allegation:*	▾
Has a determination been made for Unknown Allegation?*	▾
Add Allegation #2 for Unknown?	<input type="checkbox"/>

4. If there are multiple allegations, check the box for “Add Allegation #2 for Unknown” which will expose additional questions to be completed.
5. If the Accused is known, indicate by selecting “No”, which will expose a list of questions to be completed on the Accused.

ACCUSED

Is Accused Unknown? ▾

Accused First Name:*

Accused Last Name:*

Relationship:* ▾

Title:* ▾

Accused DOB:*

Accused Gender: ▾

Accused Race: ▾

Accused SSN:*

Accused Address:*

Accused City:* ▾

Accused State:* ▾

Accused Zip Code:* ▾

Accused Phone Number:*

Accused Allegations:* ▾



Note

If the allegation determination has not been made at the time of creating the incident record, select "No" for "Has a Determination Been Made?". **Return to the reporting form when the resolution has been made.**



Note

If the Accused DOB is unknown, enter 01/01/1900. If the Accused SSN is unknown, enter 888-88-8888.

- If there is more than one Accused involved, check the Add Accused #2 box and complete all the questions for this individual.

Add Accused #2?



- To add witnesses, complete the Witnesses section of the reporting form.

WITNESSES	
Witness Name:	<input type="text"/>
Witness Address:	<input type="text"/>
Witness City:	<input type="text"/> <input type="button" value="Clear"/>
Witness State:	<input type="text"/> <input type="button" value="Clear"/>
Witness Zip Code:	<input type="text"/> <input type="button" value="Clear"/>
Witness Phone Number:	<input type="text"/>
Add Witness #2?	<input type="checkbox"/>

8. When all the relevant items are completed, click File > Save and Close Accused/Witnesses.

Add Investigation Findings

1. Click on the Note Subpage.

Incident

Victim

Accused/Witnesses

Notes

Disposition History

2. Click File > Add Note. The Notes Details page will open.

Incident Management (Non-APS)

Notes Details

Division * INC

Note By * Smith, Jane

Note Date * 02/15/2019

Note Time 09:42 AM

Alleged Victim

Note Type *

Note

Status * Draft

Date Completed

Attachments

Add Attachment

Document	Description	Category	Action
There are no attachments to display			

3. Alleged Victim = Select name from dropdown list.
4. Note Type = Investigation Findings.
5. Note = Type note in textbox.
6. Status = Defaults to Draft.
7. To attach the form to the note, click on Add Attachment.



8. A new window will open that allows you to upload the document. Click Browse to locate the file on your computer. Once you have selected it, Click Upload.

File C:\Users\Barbara.Guglielmo\Docume Browse...

File Name from uploaded file create new

Description

Category

Upload Upload and Add Another

Note: Maximum size for attachment is set to 5.76 MBytes.

9. You will be brought back to the Note details page where you will see the uploaded document.

Attachments

Add Attachment

Document	Description	Category	Action
Incident Immediate Reporting Form.txt			Remove

10. When the note is complete, change the Status from Draft to Complete.
11. Click File > Save and Close Note.

Submit Incident Record

When the Provider user has completed entering all the Incident information, they will submit the Incident Record to HSS.

Incident Management (Non-APS)

1. Click on the Incident subpage.

Incident

Victim

Accused/Witnesses

Notes

Disposition History

2. Scroll to the Decision section of the Incident Details page.

File Reports

Incident

Victim

Accused/Witnesses

Notes

Disposition History

Event Information

Division: INC

Entry Date: 09/12/2018

Entry Time: 08:36 AM

Report Received Date: 09/12/2018

Report Method: Email

Report Type: Nursing Home

Report Made By: Guglielmo, Barbara

SIMS Facility ID: 12104

Facility Name: Guest House (The)

Incident Occurred: 09/03/2018

Incident Occurred Time: 01:15 PM

Incident Discovered: 09/05/2018

Incident Discovered Time: 03:18 PM

Incident Description: test

Referrals

Due Date: 09/12/2018

Facility Details

Street: 10145 Florida Blvd.

City: BATON ROUGE

State: LA

Zip Code: 70815

Parish: EAST BATON ROUGE

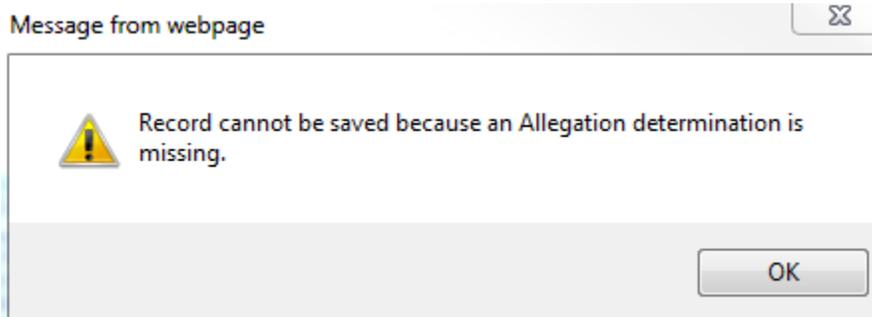
Decision

Disposition: Pending

Status: Pending

Law Enforcement Parish: East Baton Rouge

3. Change the following:
 - a. Disposition = Incident Closed
 - b. Status = Complete
4. Click File > Save and Close Incident.
5. Changing the Status to Complete will check the Incident record to ensure all information has been recorded. If there is missing information, a message will appear, alerting the user of the missing information and will not allow the user to save the Incident record.



Note

Changing the Status to Complete will render the Incident record read – only (non-editable). The Provider worker will need to contact the Nursing Home Program Manager or HSS Administrator to open the record.

HSS Incident Report

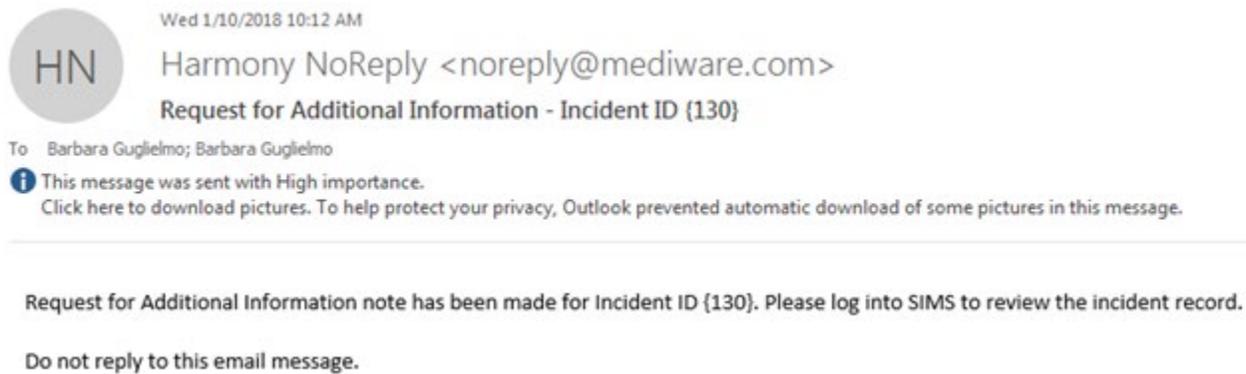
This report allows the User to see the entire Incident record as it consolidates information from the Incident Details page, the Victim page, Accused/Witness subpage and the Notes subpage.

1. On the Incident Details page, click on Reports in the SIMS toolbar and select HSS Incident Report from the dropdown menu.



2. A Production Report window will open with the report output.

1. The Provider worker will receive an email requesting additional information. Take note of the Incident ID #.



2. Upon login into SIMS, the Provider User will review the Note on the My Work dashboard. Click on Complete in the Incident Notes List.

Incident Management (Non-APS)

The screenshot shows a navigation bar with three tabs: 'MY WORK' (highlighted), 'PROVIDERS', and 'INCIDENTS'. Below the navigation bar, there are two main sections: 'INCIDENTS' and 'TASKS'. Under 'INCIDENTS', there are three sub-sections: 'Disposition' with a count of 1, 'Incident Notes List' with a count of 1, and 'Alert Notes' with a count of 0. Under 'TASKS', there is a section for 'Links' with a count of 1.

3. Click on the note in the list view grid.

The screenshot shows a search filter section with the following settings: Status (dropdown), Equal To (dropdown), Complete (dropdown), AND (dropdown), and a search button. Below the filter, it says '2 Incident Notes List record(s) returned - now viewing 1 through 2'. The table below has the following data:

Note Date	Note By	Note Type	Status
12/05/2017	Provider, NH	Follow Up: Provider	Complete
01/10/2018	Guglielmo, Barbara	Request for Additional Information	Complete

Navigation buttons at the bottom include: << First, < Previous, Retrieve 15 Records at a time, Next >, Last >>

4. After reviewing the note, click on Tools and select Mark as Read. This will be recorded at the bottom of the note.

The screenshot shows a 'File' menu with a 'Tools' sub-menu. The 'Tools' sub-menu is open, and 'Mark as Read' is highlighted in a red box. Other options in the 'Tools' menu include 'Note'.

Name	Date Sent	Date Read	Status
Guglielmo, Barbara	01/10/2018	01/10/2018	Read

5. Click File > Close Note.
6. Click File > Close Incident Notes List.
7. Click on the Incidents Chapter.

The screenshot shows a navigation bar with three tabs: 'MY WORK', 'PROVIDERS', and 'INCIDENTS' (highlighted).

8. After searching for the record, Enter the information requested by HSS.
9. After completing the record, click on the Notes subpage.

Incident Management (Non-APS)

Incident

Victim

Accused/Witnesses

Notes

Disposition History

10. Click File > Add Note.
11. Select Note Type = Investigation Findings.
12. Once the note is completed, change the Status field to equal Complete.
13. Click File > Save and Close Note.
14. Click on the Incident subpage.
15. Scroll down to the Decision section of the page and change the following fields:
 - a. Disposition = Incident Closed
 - b. Status = Complete.
16. Click File > Save and Close Incident.



Role = **Nursing Home Provider**

1. The Nursing Home Provider will receive an email notification that an Incident needs additional CNA information. Take note of the Incident ID #.



Wed 3/6/2019 8:46 AM

Harmony NoReply <noreply@mediware.com>

CNA/DSW Additional Information Needed - Incident ID {651}

To Barbara Guglielmo

 This message was sent with High importance.
Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

CNA/DSW Additional Information Needed note has been made for Incident ID {651}. Please log into SIMS to review the incident record.

Do not reply to this email message.

2. Upon login, the Nursing Home Provider will review the Note on the My Work dashboard. Click on Complete in the Incident Notes List.

Incident Management (Non-APS)

The screenshot shows the 'MY WORK' tab with three sub-tabs: 'MY WORK', 'PROVIDERS', and 'INCIDENTS'. The 'INCIDENTS' sub-tab is active, displaying a list of incident items under the heading 'INCIDENTS'. The items are:

- Disposition: Program Staff Reviewed- Follow Up Needed (1)
- Incident Notes List: Complete (1)
- Alert Notes: Unread Alert Notes (0)

The 'TASKS' sub-tab is also visible, showing a list of tasks under the heading 'TASKS':

- Links: Training Resources for Nursing Homes and ICF/DD Providers

3. Click on the Note in the list view grid.
4. After reviewing the note, click on Tools and select Mark as Read. This will be recorded at the bottom of the note.

The screenshot shows a 'Tools' menu with a red box highlighting the 'Mark as Read' option. Below the menu is a 'Note' field.

Name	Date Sent	Date Read	Status
Guglielmo, Barbara	01/10/2018	01/10/2018	Read

5. Click File > Close Note.
6. Click File > Close Incident Notes List.
7. Click on the Incidents Chapter.
8. Search and open the Incident record.
9. Click on the Notes Subpage.
10. Click File > Add Notes.
11. Select Investigation Findings as Note Type.
12. Use the Note textbox to capture additional information.
13. Click Add Attachment if documents need to be uploaded to the record.
14. Once all fields have been completed, change the Status field to equal Complete.
15. Click File > Save and Close Note.
16. Navigate back to the Incident Subpage.
17. Click File > Save and Close Incident.



Role = **Nursing Home Provider**

1. Monitor incidents whose Disposition = Extension Approved on My Work > Incidents Disposition Pane.

Incident Management (Non-APS)

fc



Role = **Nursing Home Provider**

1. Monitor incidents whose Disposition = Extension Denied on My Work > Incidents Disposition Pane.

Training Notes