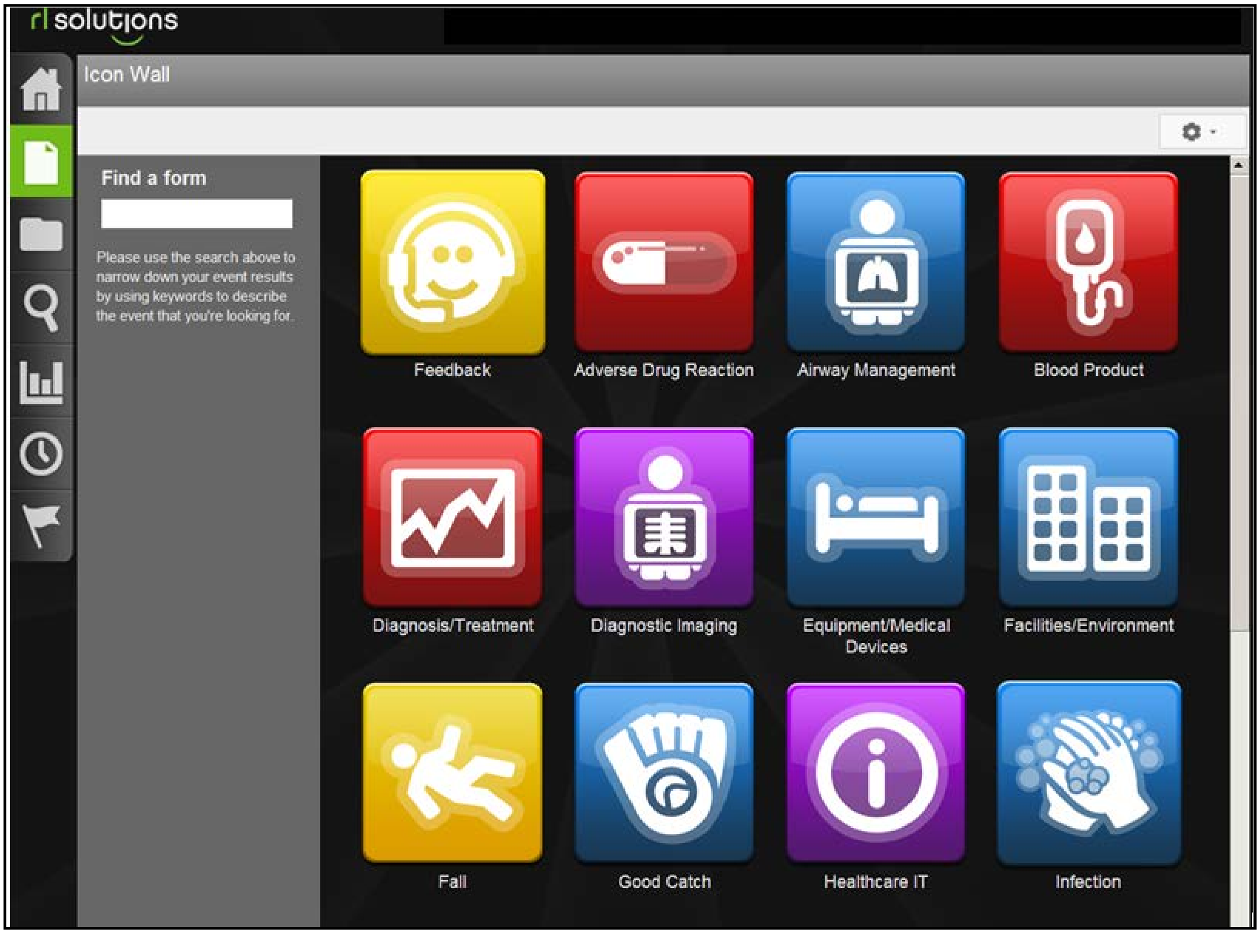
RL6 – Risk



CEO / COO / Designate Reference Manual

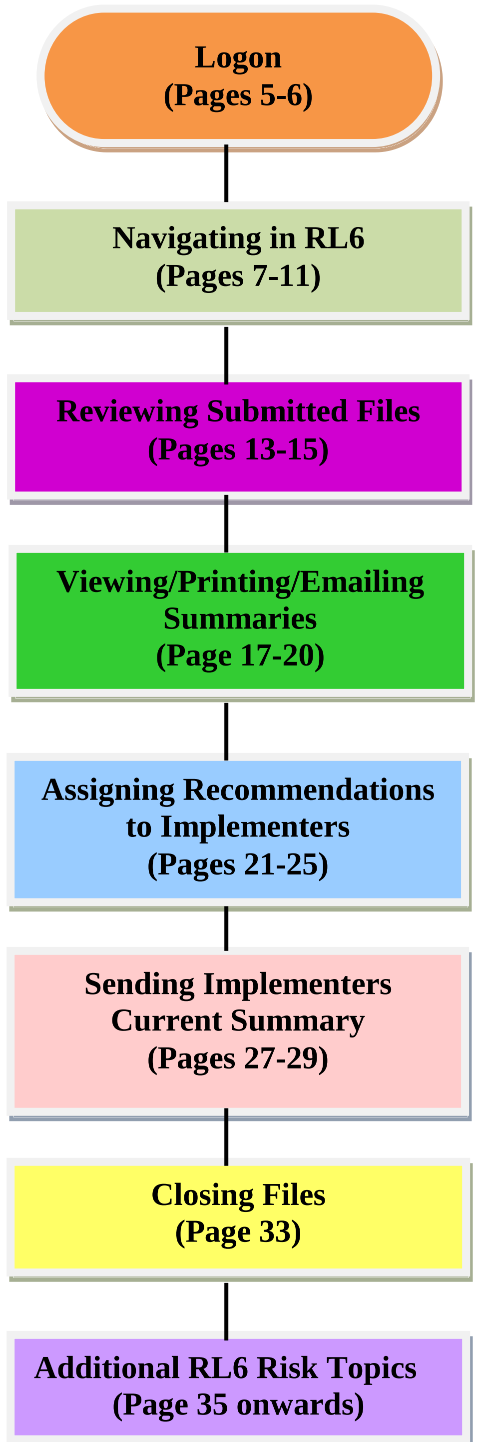
If you have RL6 Risk questions please contact:

Sandy Pereira spereira2@wrha.mb.ca or (204)926-8077

WRHA Quality Improvement & Patient Safety
Version: 2.0, January 27, 2014

Table of Contents

CEO/COO/Designate RL6 Risk Algorithm



PURPOSE

The purpose of RL6 Risk implementation is to improve the safety of patients, clients and staff by enhancing the occurrence management and reporting processes throughout the region.

The key goals of the RL6 Implementation include:

- To prevent re-occurrence and/or the risks associated with re-occurrence through early identification of risks and system errors

- To identify and prioritize opportunities and recommendations for improvement at the unit, site, program and regional level

- To develop a regional approach to monitor and report on key performance indicators related to patient safety (i.e. falls, adverse drug reactions)

- To promote a culture that supports organizational learning and growth by sharing information and lessons learned through enhanced monitoring and reporting capabilities

GETTING STARTED WITH RL6 RISK

You can log onto RL6 Risk either through the web or by clicking on the email link you received within the Alert message.

Logging In through the Web

1. Double-click on the **RL6** **icon** on the Desktop.

   Note: If there is no RL6 icon on the Desktop go to ***https://rl6.rlsolutions.com/WRHA_Prod***

   > ***Training Site:*** https://rl6training.rlsolutions.com/wrha_training/
   > (*The training site can be accessed for education purposes. However, please be aware this site will occasionally be configured different than 'normal' if specific user groups are being trained. If you would like to access this site to train your own staff or highlight specific features of RL, please call ahead to ensure there won't be any issues. Ph:204-926-8087).*

2. Ensure **WRHA** is selected from the drop-down box.

3. Type in your windows username and password that you use to access your work computer.

4. Click **Login**.

Logging in through Email Alerts

Another way to access RL6 is to click on the email link you received within the Alert message.

1. From your email Alert message, click the link to open up the RL6 login screen.

IMPORTANT ALERT

Dan, you are receiving this Alert because a CI has been verified.

This Notification was generated on 04-03-2013 16:30:57.

Below are the links to the files that triggered this Alert.

Click the link from your email Alert message → File 5871 **Event Date (mm/dd/yyyy):** 03-29-2013, **General Event Type:** Skin/Tissue, **Specific Event Type:** Ulcer, **Site/Community Area:** Grace Hospital, **Severity Level (Reported):** 2. Minimal Harm

2. Ensure **WRHA** is selected from the drop-down box.

3. Type in your windows username and password that you use to access your work computer.

4. Click **Login**.

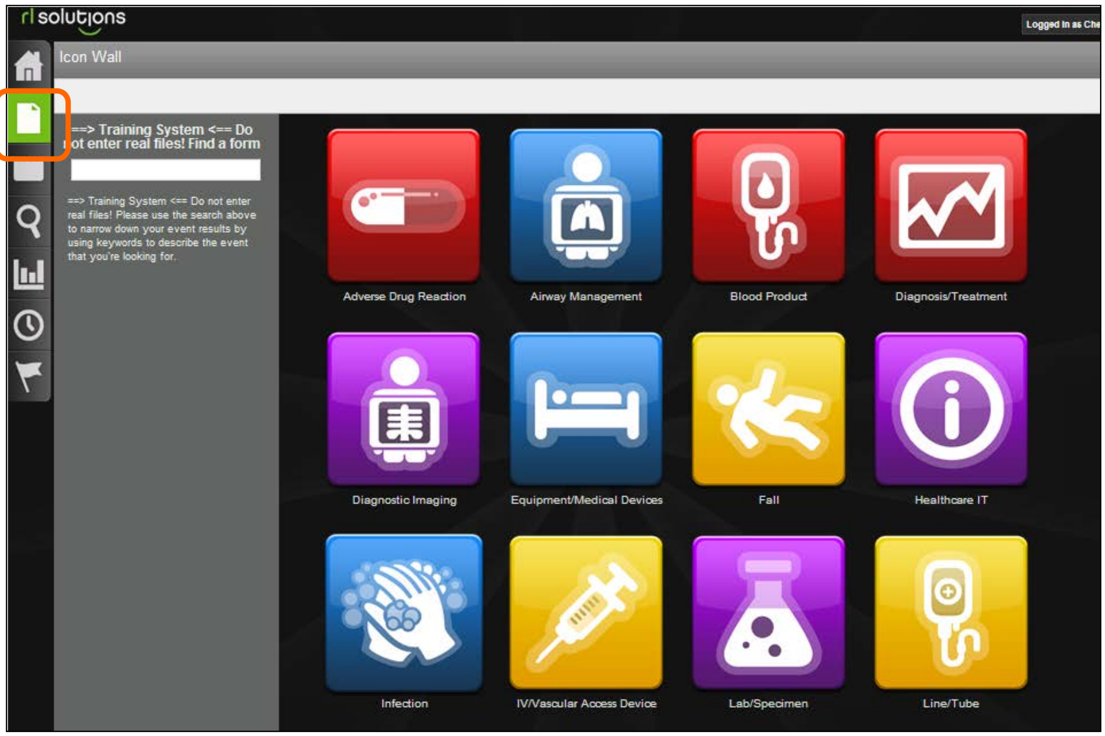
NAVIGATING IN RL6

Icon Wall

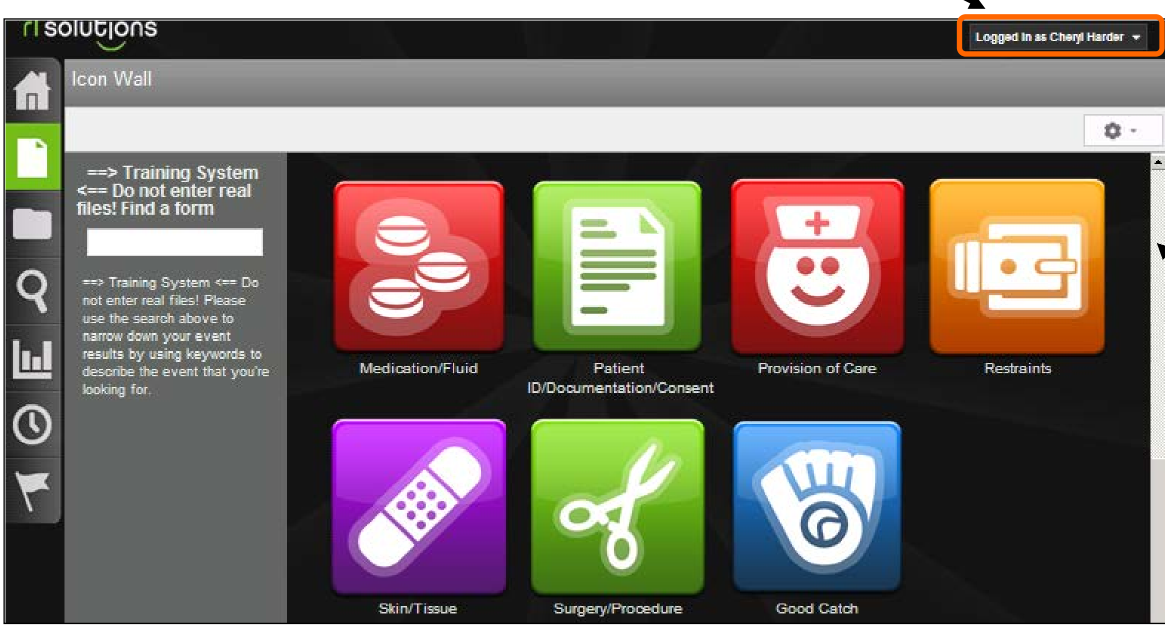
The Icon Wall contains links to the submission forms used to create new files.

1. Click the **New File** navigation button to access the Icon Wall.

New File



Indicates who is logged

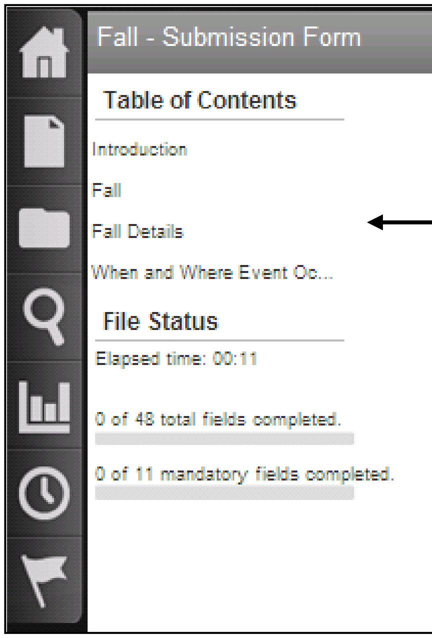


Use the scroll bar to move down

Navigation Toolbar

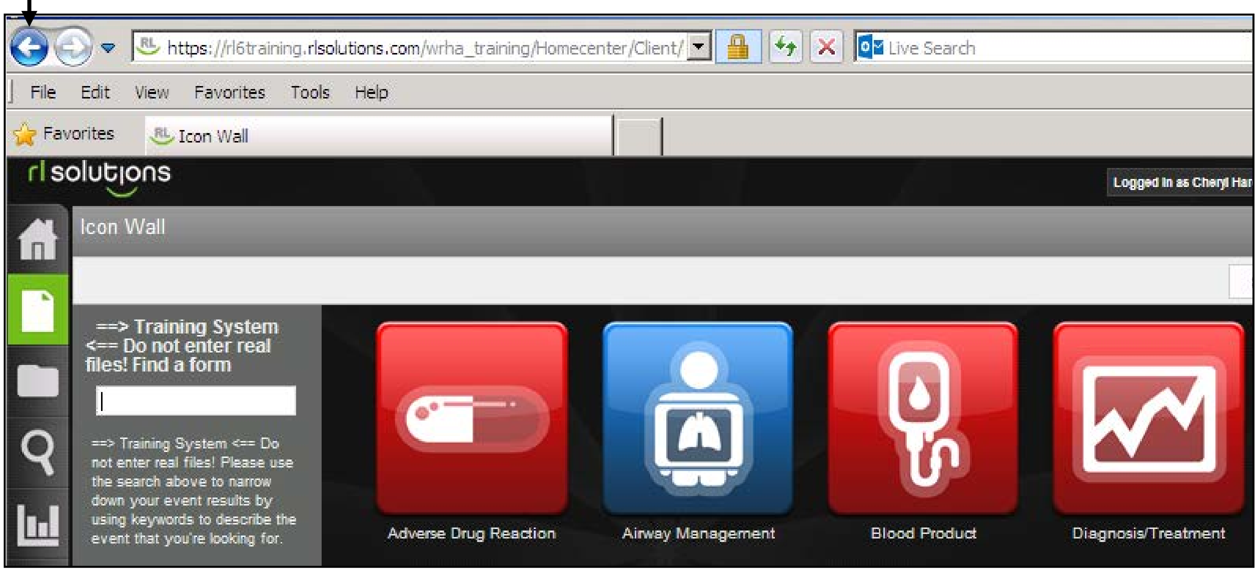
Back Button

Use the left-side widgets to navigate within the event form. Do not use the **Back** button to go to the previous screen.



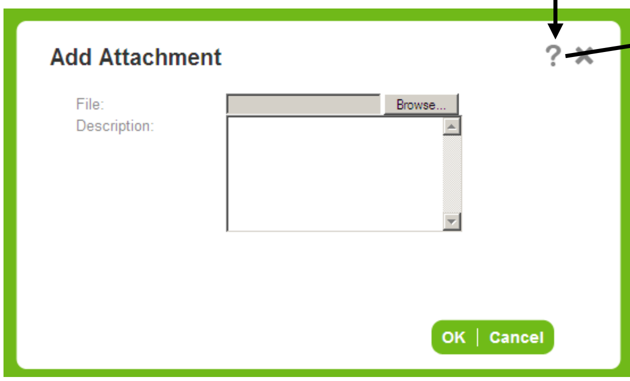
Click on the section of the form that you want to go to

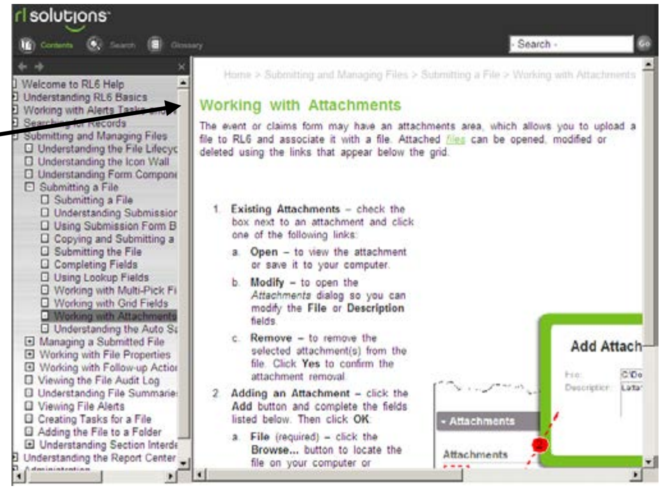
DO NOT use the Back Button



Using Help

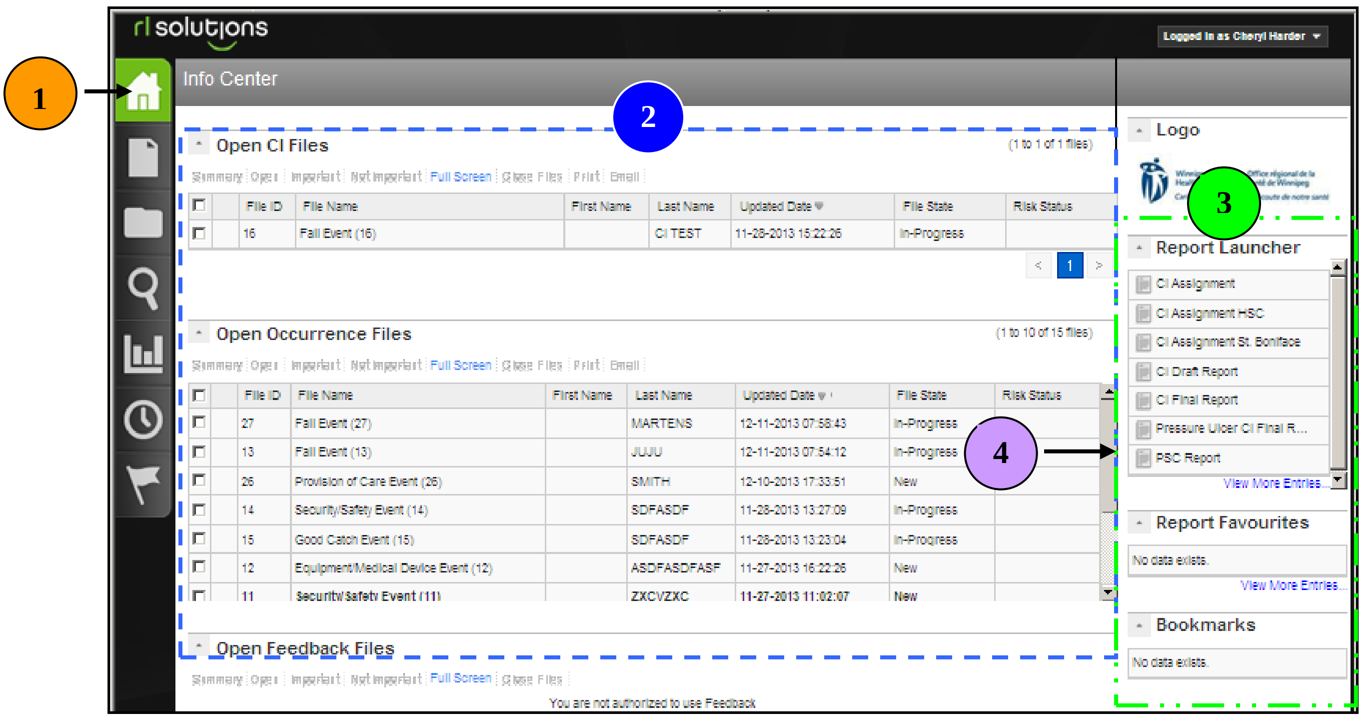
Click the ? to open up Help





Info Center

The Info Center contains a collection of widgets. This page is like a dashboard, bringing you important information. The page is split into two scrollable columns that show search results, files, tasks and alerts in the largest column on the left; in the small column on the right, links to reports and websites.



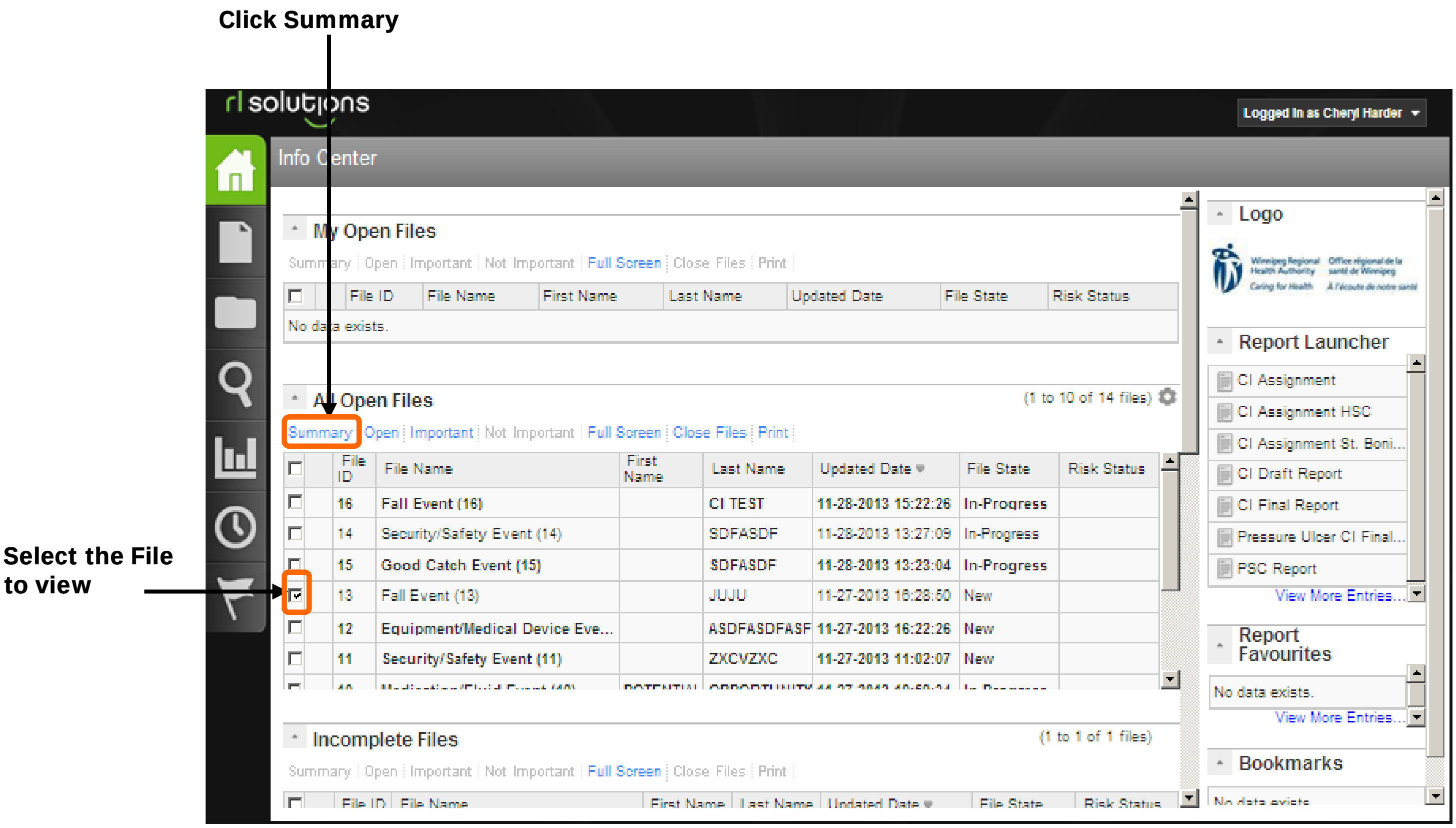
1	**Home Icon** click this icon to return to the **Info Center** at anytime.
2	**Main Widgets** – widgets that show relevant files, tasks or alerts. You can view summaries or open files directly from these widgets.
3	**Side Widgets** – widgets that provide links to Rl6 reports or external websites.
4	**Column Scroll Bars** – appear when the widgets extend beyond the space available in your browser window.

REVIEWING A SUBMITTED FILE

A quick way to view a file is through the Summary link. The current file summary will display.

Viewing Current File Summary

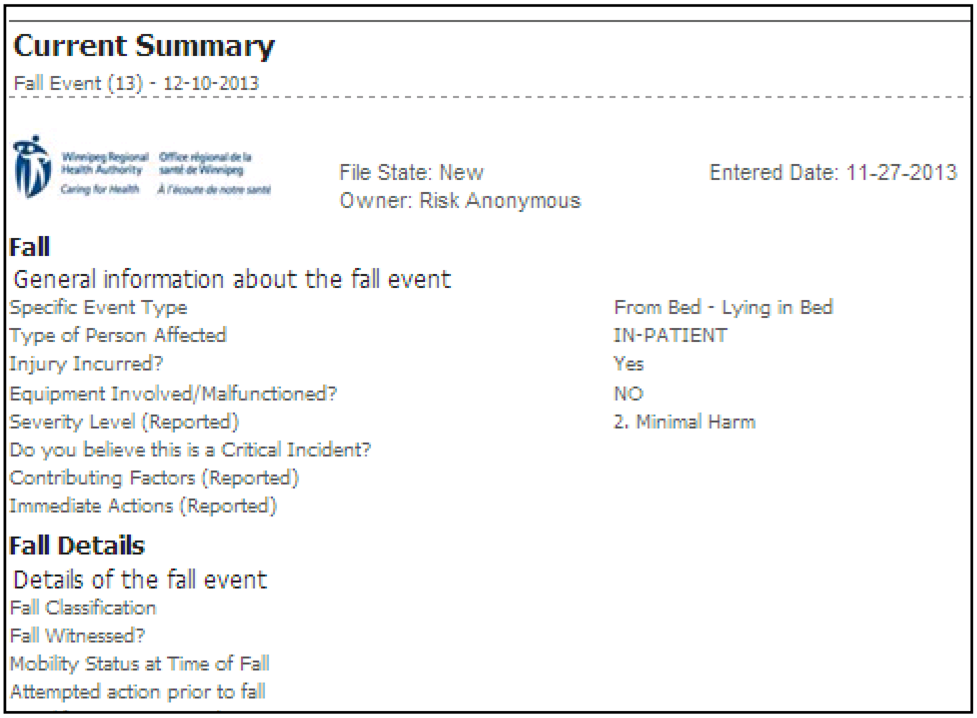
1. Click the **Info Center**  icon to return to the *Info Center*.



2. Select the desired file to view by clicking in the selection bubble before the file name.

3. Click the **Summary** link.

The *Current Summary* window opens.



4. Scroll through the summary to view the file information.

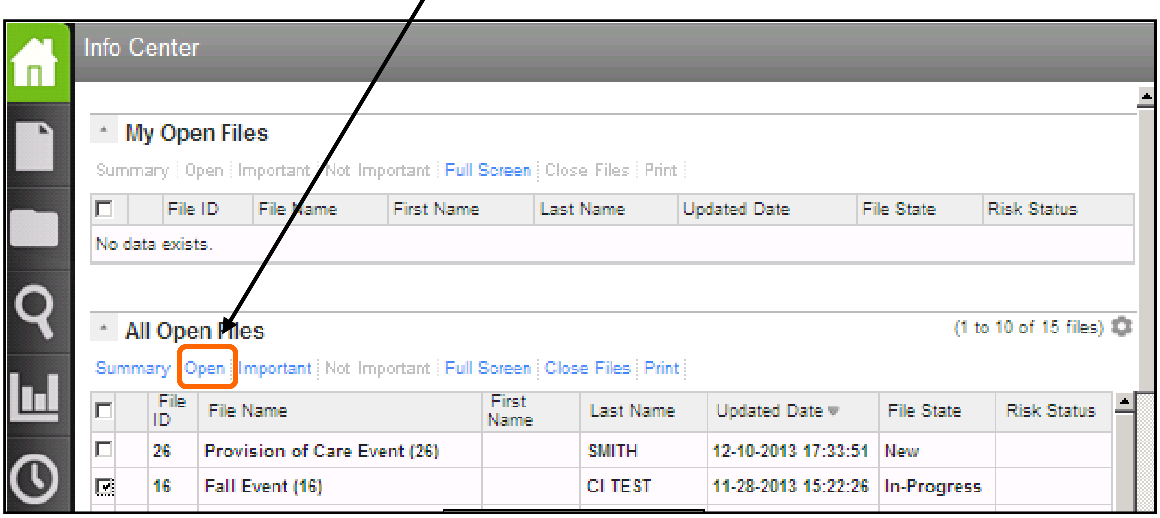
5. Click the ☒ (top-right corner) to close the summary.

Opening Files

1. From the *Info Center* select the desired file by clicking in the selection bubble before the file name.

2. Click the **Open** link.

Open



Note: Clicking on the file name also opens the file.

What CEO/COO/Designates can View

While the review is in process the CEO/COO/Designates can see the file in read only view. They can view the entire file expect for the reporter's name, the parties involved, and the CI section.

After the review is complete the CEO/COO/Designates, in read only view, can see the CI section, except for the CIRCs interview notes. They have access to the Resolution and Outcome section including Recommendations.

VIEWING/PRINTING/EMAILING FILE SUMMARIES

There are different file summaries that can be viewed based on your role assignment. You can hide sensitive fields or modify the summary in all but the Original Summary. You may email a PDF copy of the file summary or print the summary.

- **Original Summary**
  displays information from when the event was originally submitted

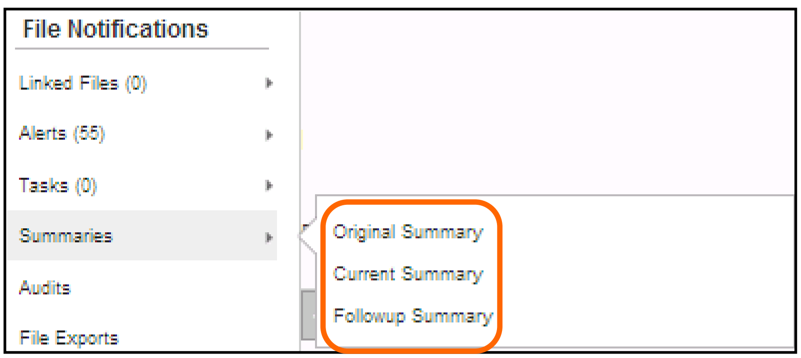
- **Current Summary**
  displays the original summary with any updates

- **Followup Summary**
  displays only the followup section of the summary

Viewing Summaries

1. Ensure the file is open.

2. In the **Summaries** widget, click the summary type you want to view.



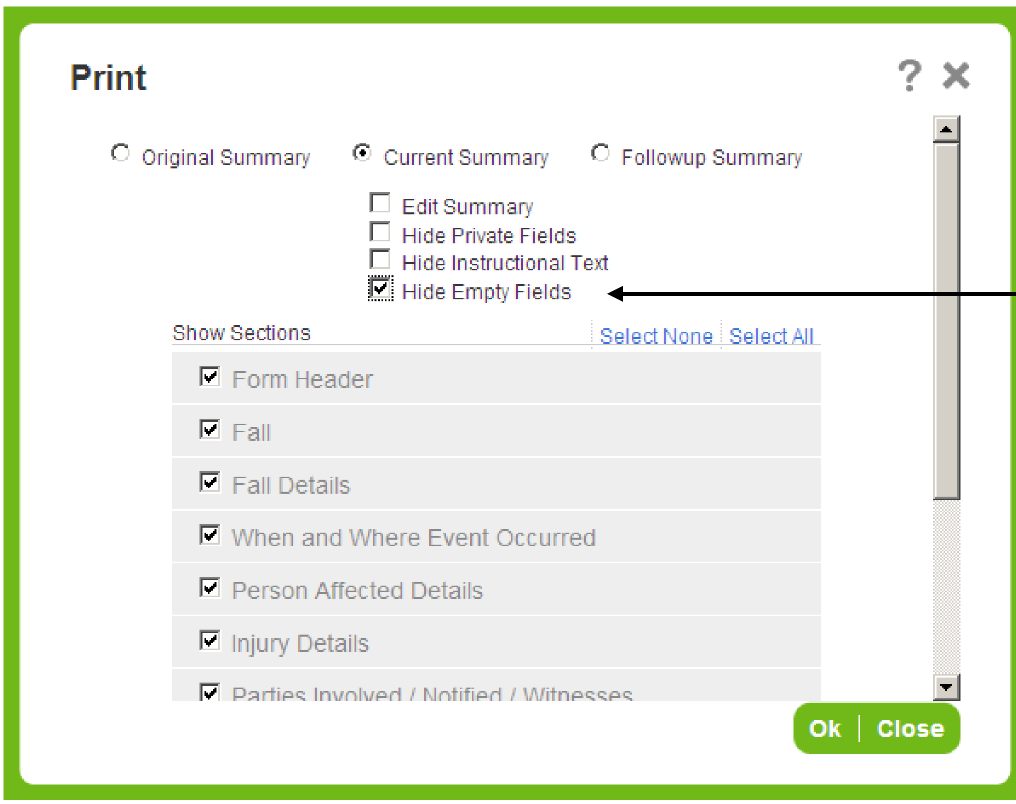
The summary window opens.

Printing Summaries

1. Ensure the file is open.

2. Click the **Share**  button (top-right).

3. Select the **Print** option to print the summary.



Click **Hide Empty Fields** to hide blank fields in the Summary

4. If desired, click the **Hide Private Fields** check box to hide the patient's name, DOB and MRN.

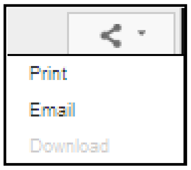
5. Click **OK**.

Emailing Summaries

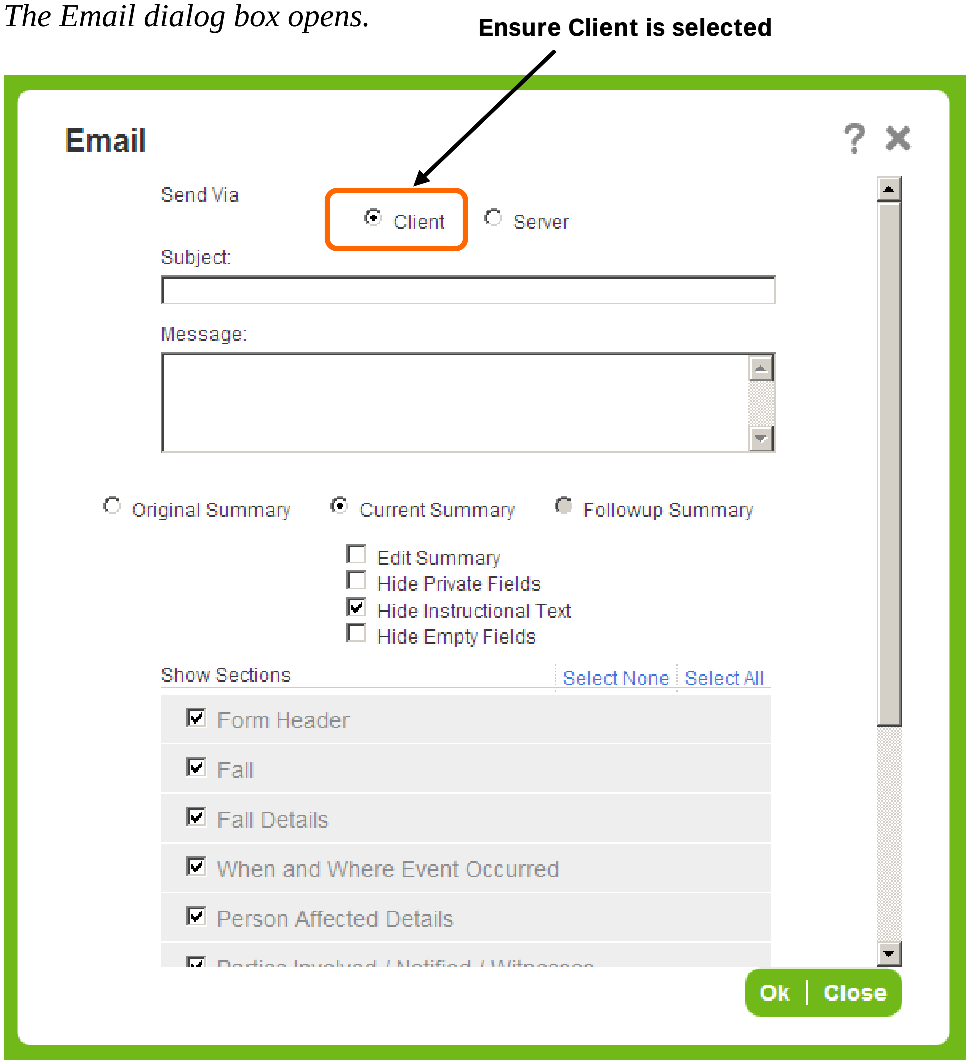
1. Ensure the file is open.

2. Click the **Share**  button (top-right).

3. Select the **Email** option to email the summary.



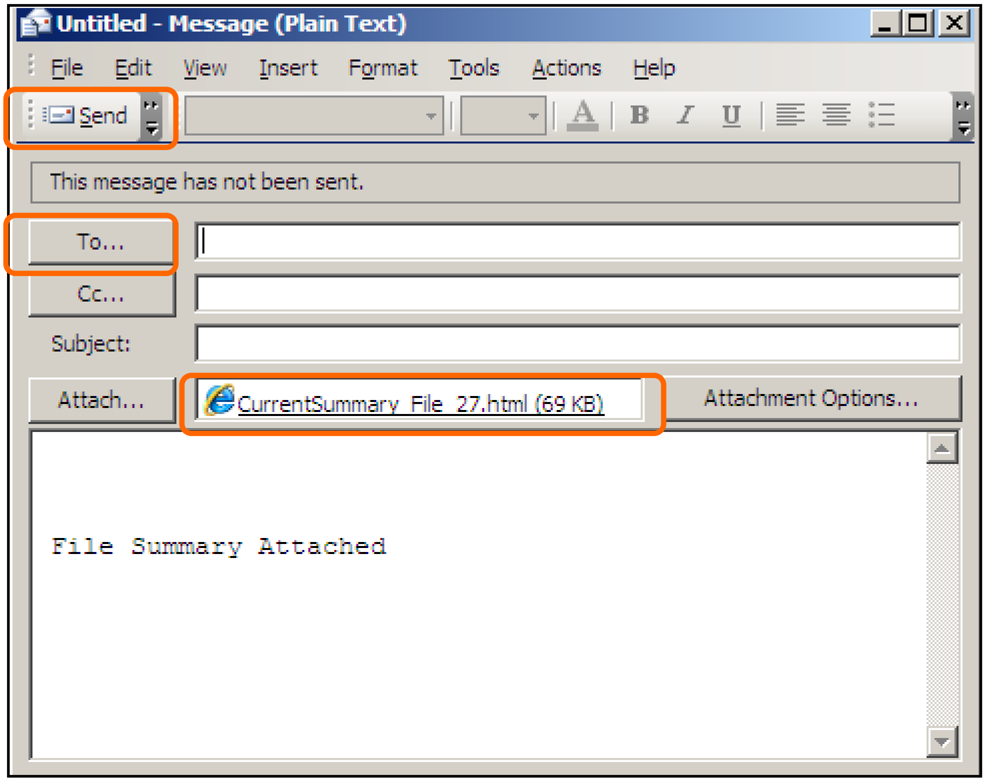
The Email dialog box opens.



4. Ensure **Client** is selected in the *Send Via* section of the dialog box.

5. Click **OK**.

Outlook opens with the summary attached.



6. Type the email address in the **To** text box or click the **To** link to select the email address.

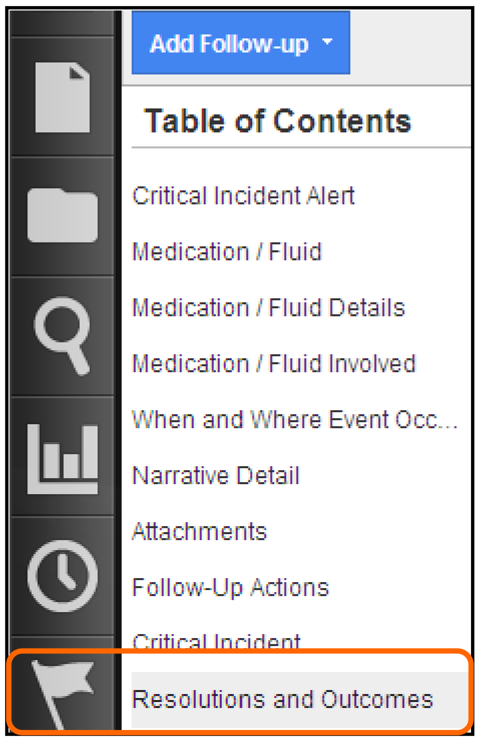
7. Click the **Send** button.
   The email and summary are sent to the recipient.

ASSIGNING RECOMMENDATIONS TO IMPLEMENTERS

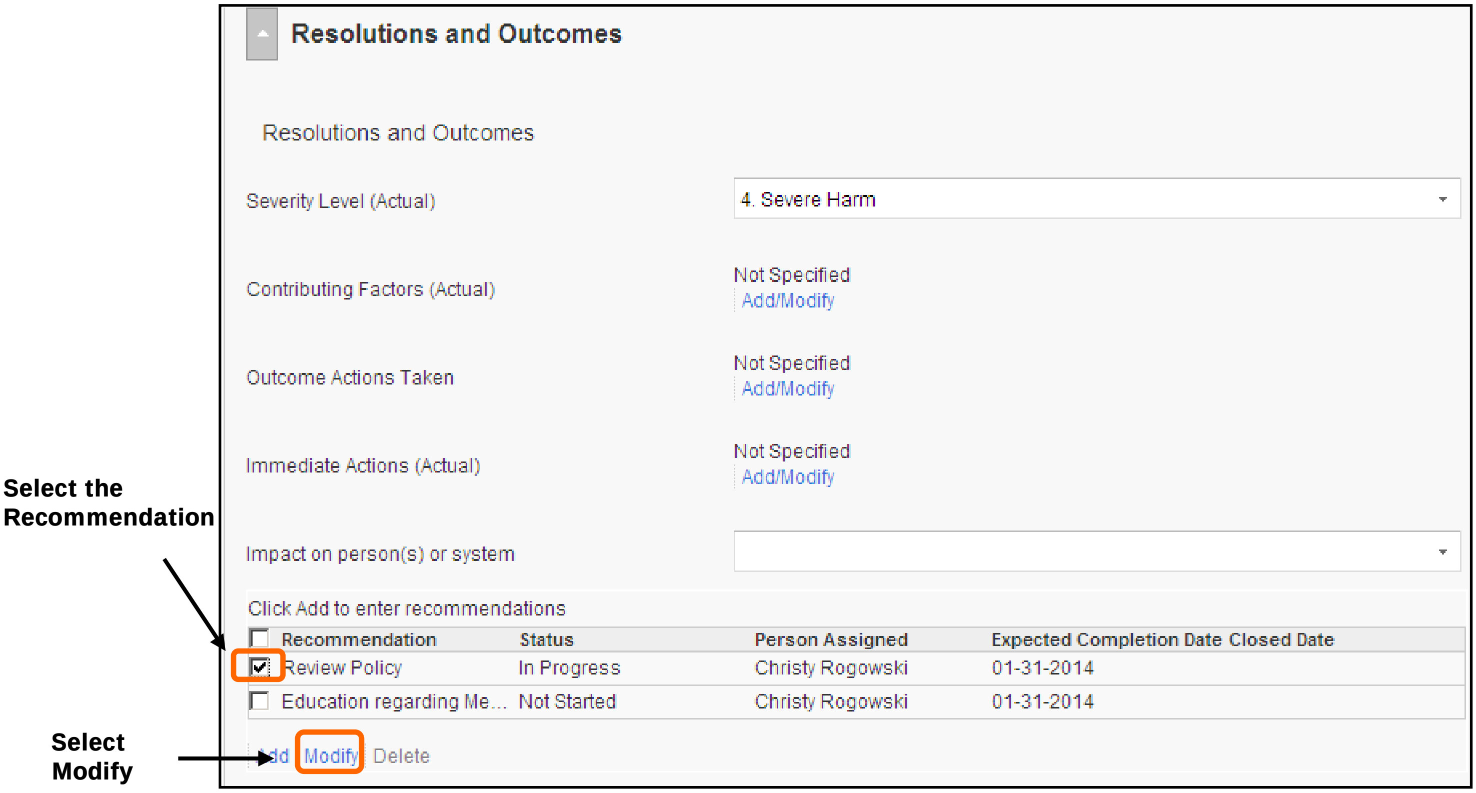
After reviewing the report you can send recommendations to an implementer to work on. The first step is to assign an implementer then to send them the Current Summary of the file via Outlook. If the implementer has access to RL6 Risk, and is within your reporting structure, you do not need to send them the Current Summary since they can view it from the CI Final Report Complete Alert they received.

1. Open the file that you want to assign an implementer to.

2. Select **Resolutions and Outcomes** from the left-side widget.

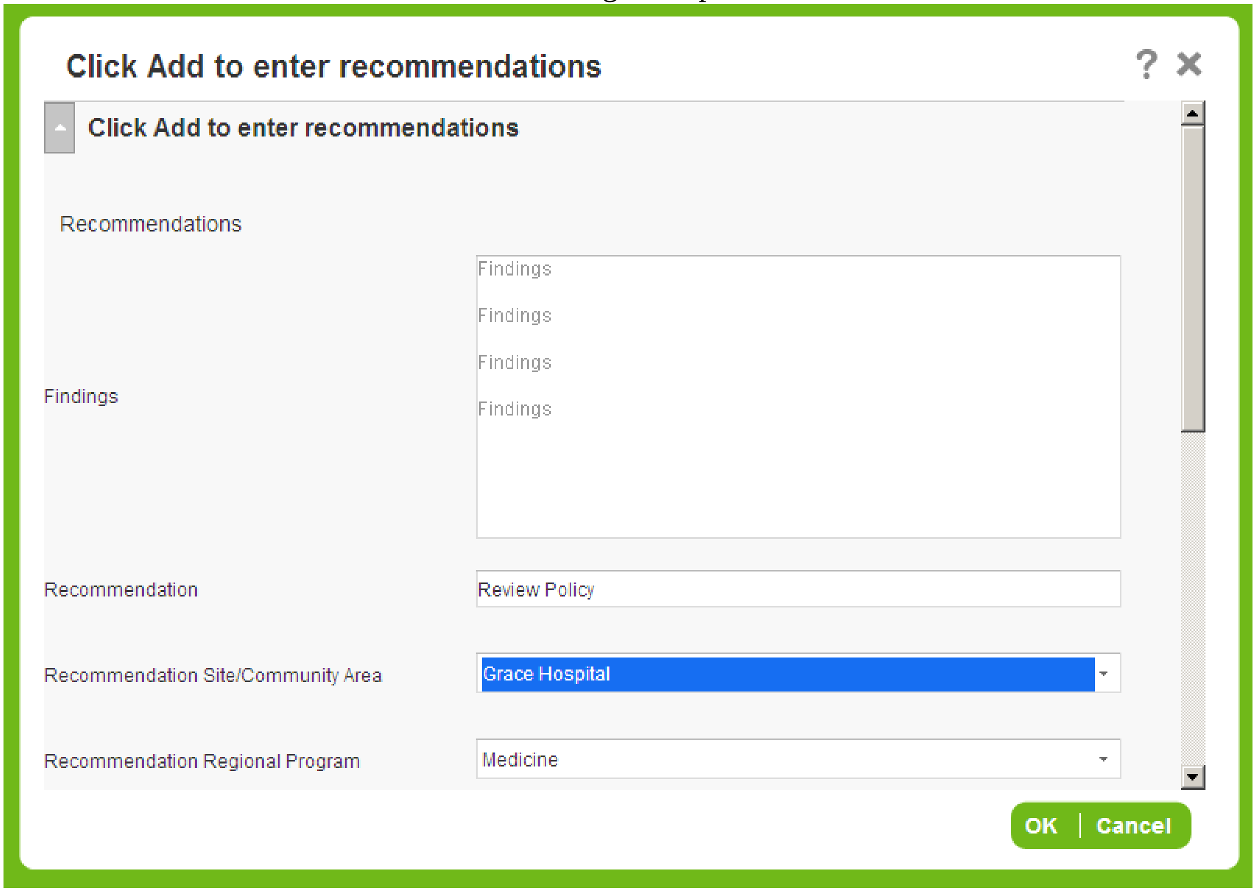


The Resolutions and Outcomes dialog box opens.



3. Select the recommendation you want to assign and select **Modify**.

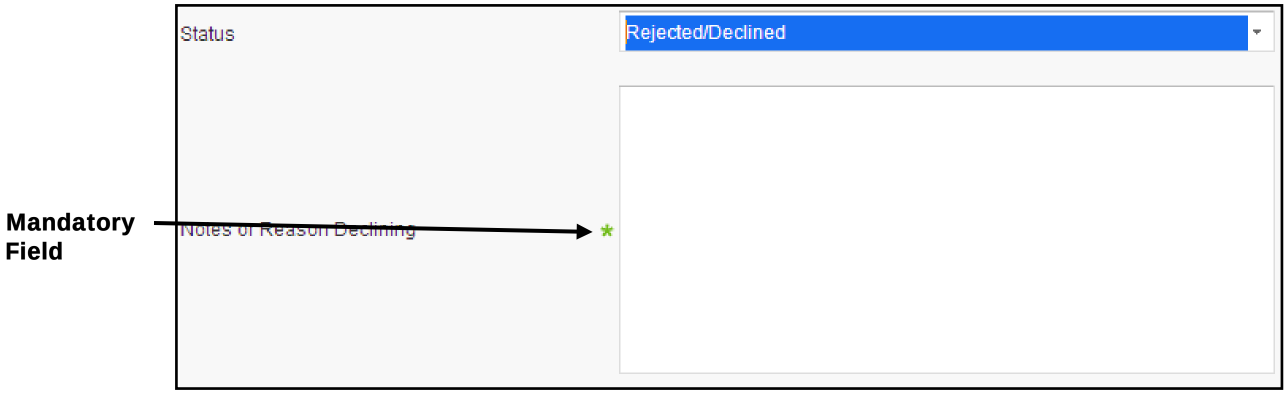
The *Click Add to enter recommendations* dialog box opens.



In most cases, some of this dialog box will already be filled out by the CIRC lead.

4. Ensure the appropriate person is entered in the **Person Assigned** text box.
5. Ensure the **Expected Completion Date** is entered.
6. Select the appropriate **Status**.

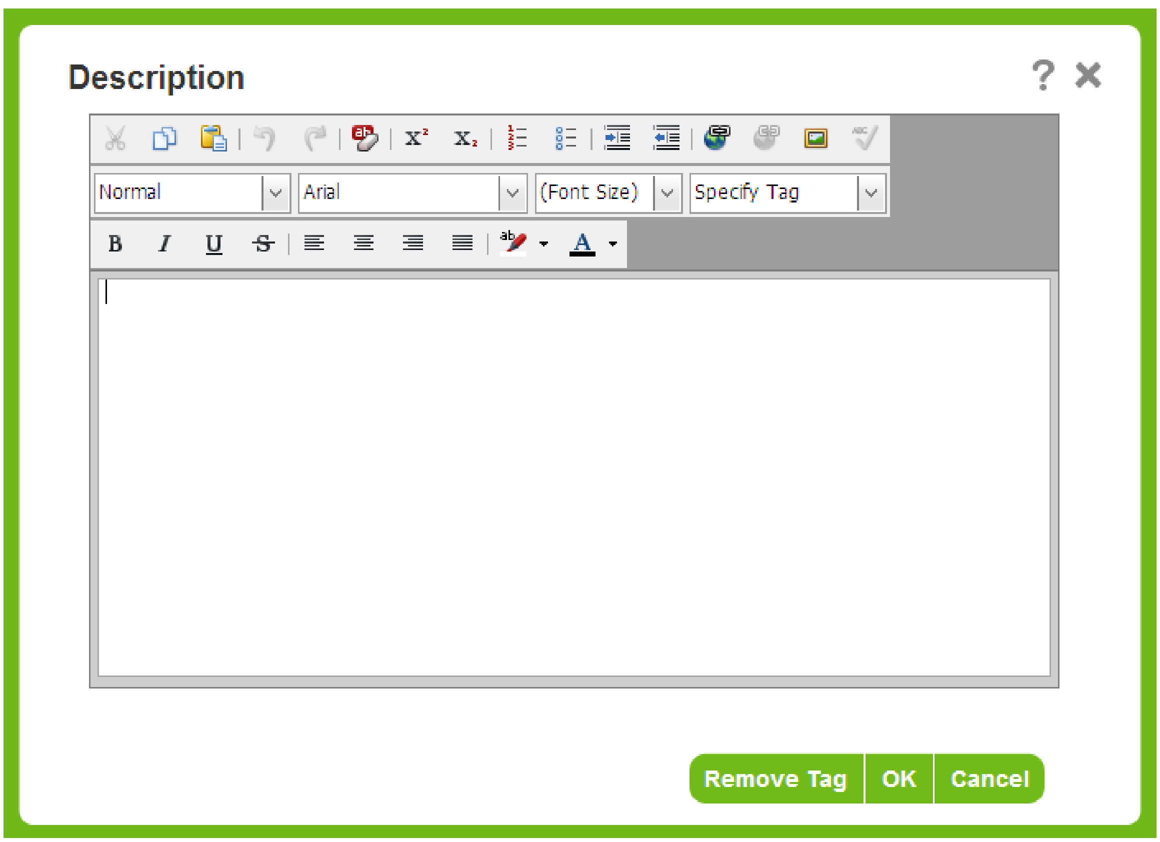
If the status **Rejected/Declined** or **Completed** is selected enter an explanation in the *Notes or Reason Declining* text box. The * indicates that it is a mandatory field.



Note: Before you enter any information into the Notes or Reason Declining text box ensure to first open up the Text Editor by double-clicking in the *Notes or Reason Declining* text box.

Text Editor

To open up the Text Editor double-click inside the appropriate text boxes such as Notes or Reason Declining, Narrative Details, Work Done on File. Within the Text Editor screen you can use various formatting functions such as bold, font style and color and spell check.



Note: Always use the copy and paste functions within the Text Editor. If you copy and paste directly within the form (not opening the Text Editor) the text may be overwritten. Ensure to first double-click in the form to open up the Text Editor and then use the copy and paste functions. While working in the Text Editor ensure to click OK and Save every 10-15 minutes.

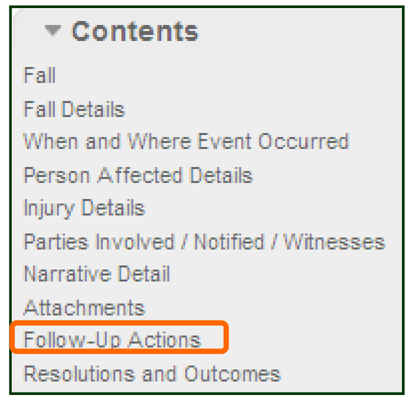
7. Select **OK**.

8. Click **Save**.

SENDING IMPLEMENTER CURRENT SUMMARY TO WORK ON RECOMMENDATIONS

Once an implementer has been assigned to work on recommendations they need to be given access to the file. In order for the implementer to view the file the COO/CEO/Designate emails the implementer the file's Current Summary. If the implementer has access to RL6 Risk, and is within the COO/CEO's reporting structure, the Current Summary does not need to be sent since the implementer can view it from the CI Final Report Complete Alert they received.

Sending Current Summary via Outlook



1. Click the **Info Center**  on the *Navigation* toolbar.

2. Select the file that you want to task the implementer with.

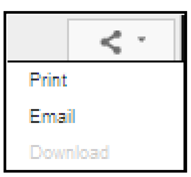
3. Click **Open** at the top of that menu bar.

Note: Within the *Resolutions and Outcomes* section, ensure you have completed the fields in the *Recommendation* dialog box, such as Person Assigned, Completion Date and Status.

4. Click the **More Actions** button, and click **Save**.

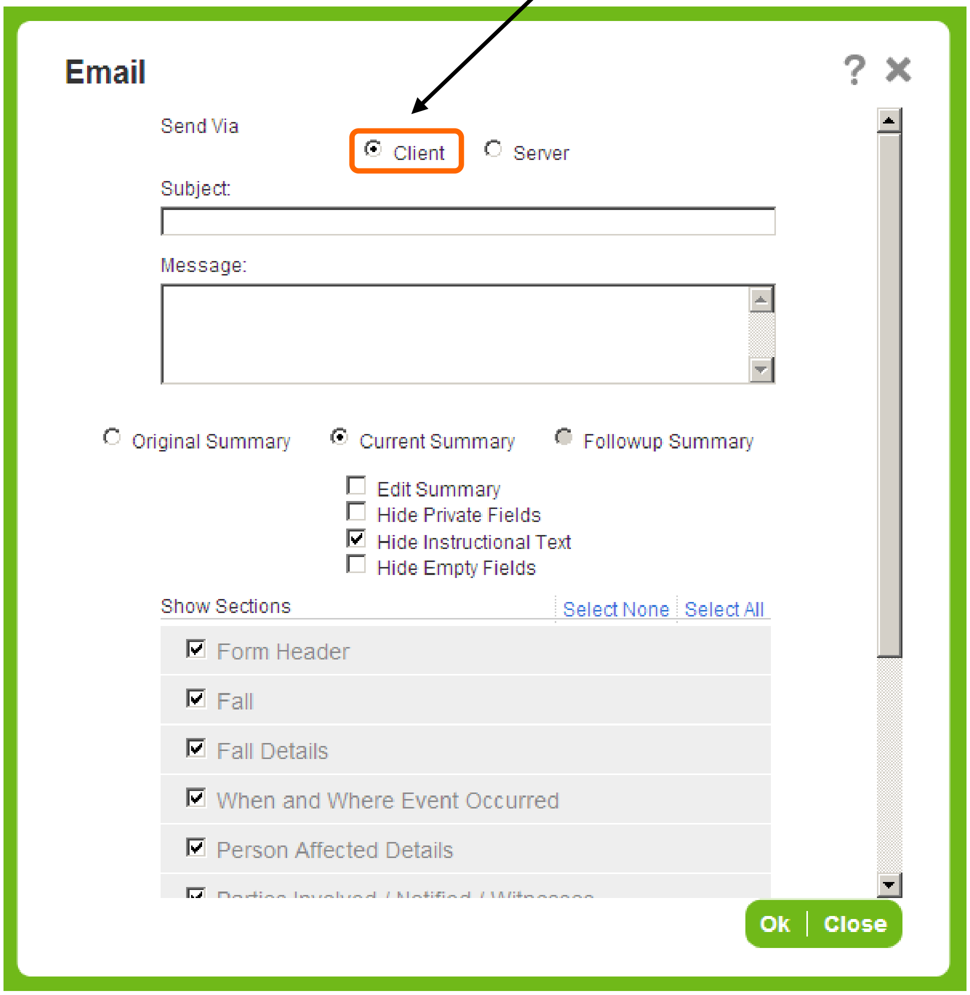
5. Click the **Share**  button (top-right).

6. Select the **Email** option to email the summary.



The Email dialog box opens.

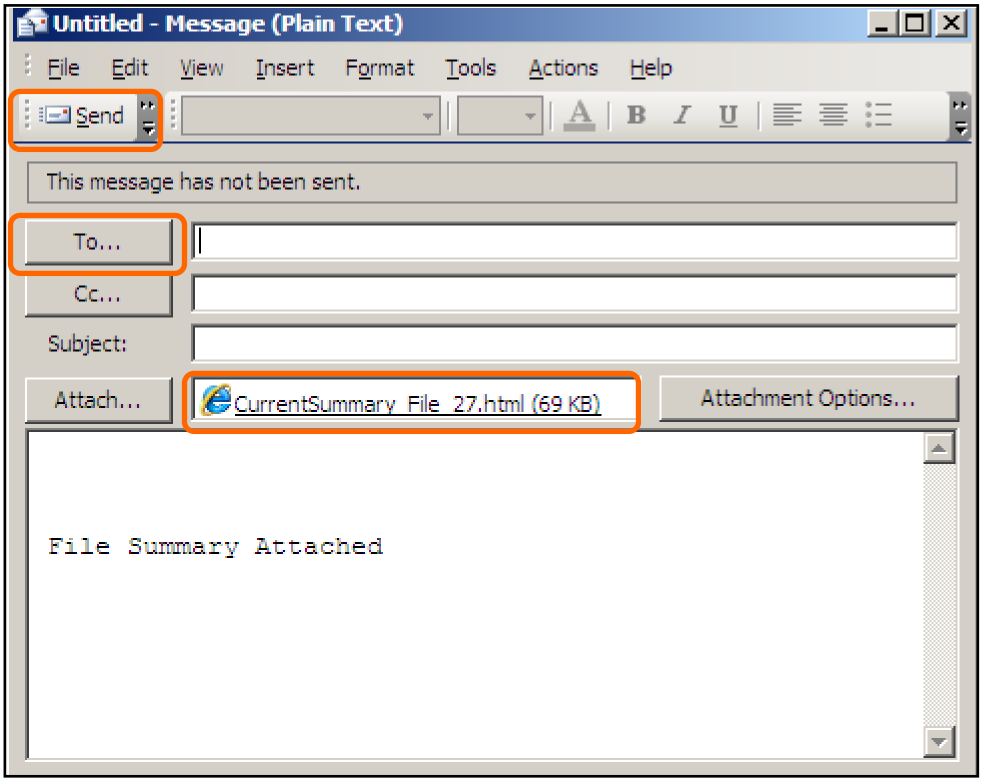
Ensure Client is selected



7. Ensure **Client** is selected in the *Send Via* section of the dialog box.

8. Click **OK**.

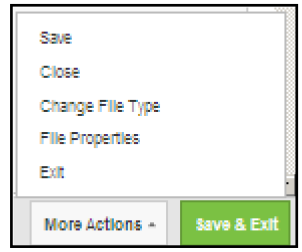
Outlook opens with the summary attached.



9. Type the email address in the **To** text box or click the **To** link to select the email address.

10. Click the **Send** button.
    The email and summary are sent to the recipient.

SAVING FILES



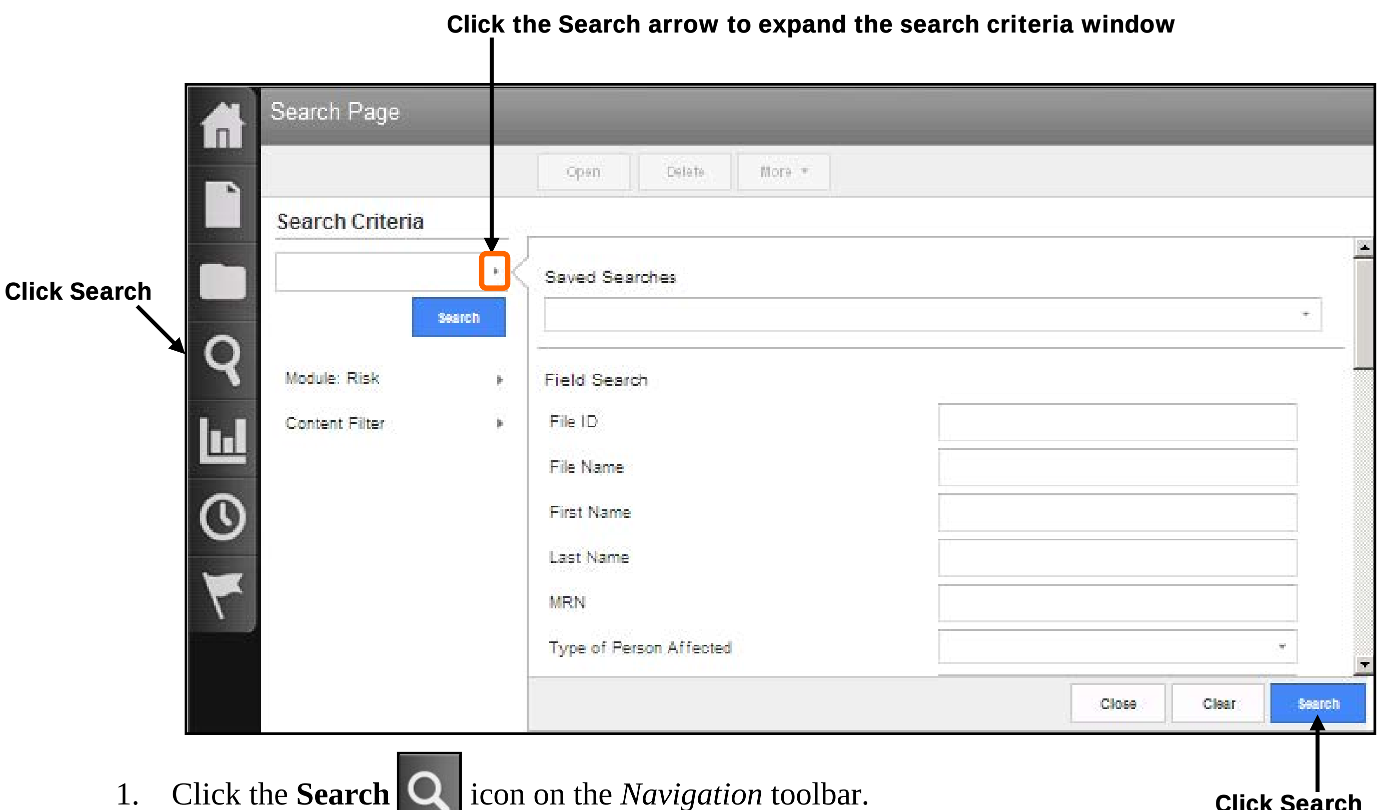
When you are working on a file ensure to click **Save** or **Save & Exit** to save your work.

If you click logout or close the file, without saving, your changes won't be saved. Save every 10 minutes.

Note: The Save & Exit button becomes enabled when a change has been made to the file.

SEARCHING FOR FILES

You can use the Search feature to search for file by specific search criteria.



1. Click the **Search** icon on the *Navigation* toolbar.
2. Click the *Search* arrow to expand the search criteria window.
3. Select the desired criteria (e.g. name, general event type, MRN) from the *Search* window. Use the scroll bar to access additional search fields, if necessary.
4. Click the **Search** button.
5. Files matching your search criteria are displayed in the *Search Results* section.

6. Select the desired file.

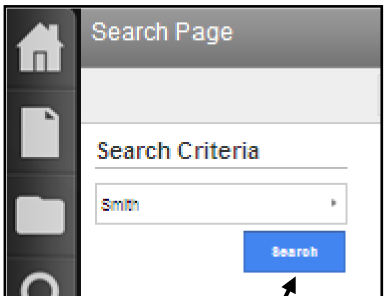
7. Select the **Open** or **More** button and select the desired option (open, view or print summary, close).

Quick Search

With a Quick Search you can enter search criteria without clicking the search arrow and entering the criteria in the search criteria window.

1. Click the **Search**  icon on the *Navigation* toolbar.

2. Enter the criteria you are search for in the text box, for example, “Smith”.



3. Click the **Search** button.

> **Note:** The Quick Search method will search for your criteria through all fields.

WORKING WITH PDF FILES

Creating PDF Files

If you would like to attach a Word file into your RL6 file the first thing that has to be done is to PDF the Word file.

1. Open the Word file you would like to PDF.

2. Select **File, Print.**

3. Select PDF from the printer list.

4. Select where you want to file to save to.

5. Click **Print**.

Attaching PDF Files in RL6

1. Open the RL6 file where you want to attach the PDF file.

2. Go to the **Attachments** section of the file.

3. Click **Add**.

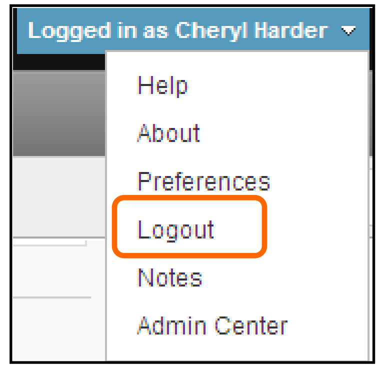
4. Click **Browse** and click on the PDF file you want to attach.

5. Click **Open**.

6. Click in the Description area and type in a description about the file you are attaching.

7. Click **OK**.

LOGGING OUT

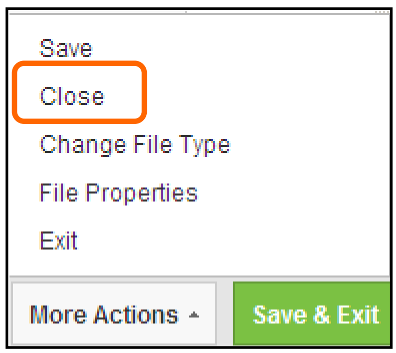


Ensure to click *Save & Exit* when you want to log out or click the *Logout* link on the *Info Center* toolbar (top-right). Do not click the X (Close) on the RL6 menu bar to exit because this is not the proper way to exit and may lock up your file for up to 30 minutes. If your file is locked contact **Sandy Pereira spereira2@wrha.mb.ca or (204)926-7849** to have it unlocked.

CLOSING FILES

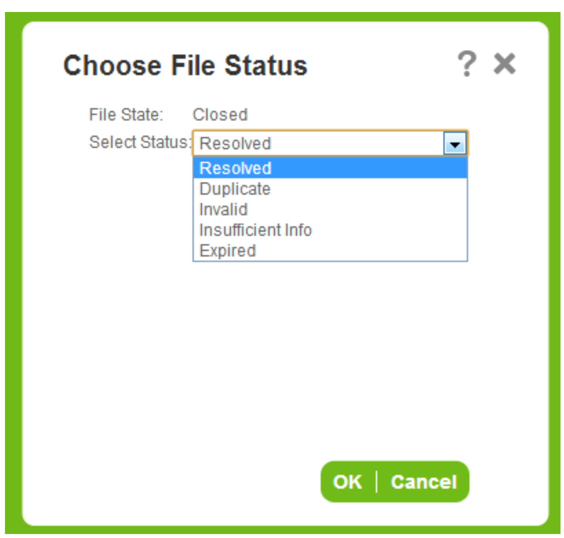
Once the recommendations are marked complete, within the *Resolutions and Outcomes* section, the file can be closed.

1. Ensure the file is open.
2. Click the **More Actions** button.



3. Select **Close**.

The Choose File Status dialogue box appears.

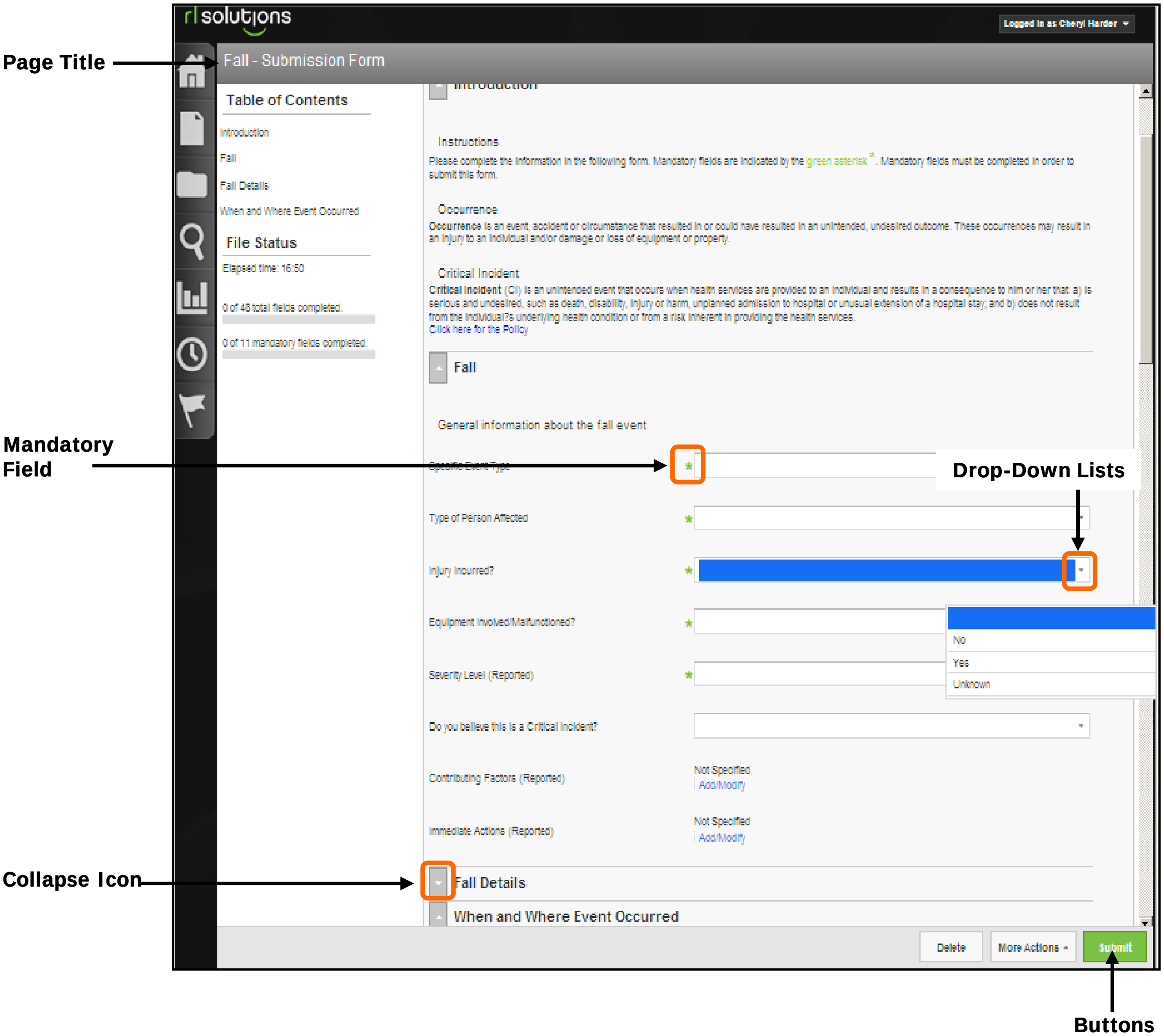


4. Select the desired option from the *Select Status* drop-down box.

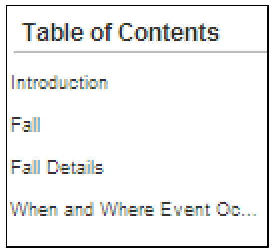
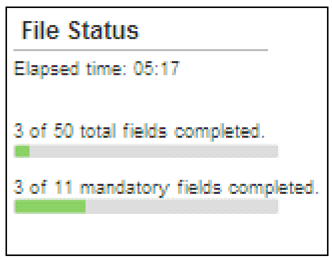
5. Click **OK**.

SECTION 2 - ADDITIONAL RL6 RISK TOPICS

NAVIGATING IN RL6



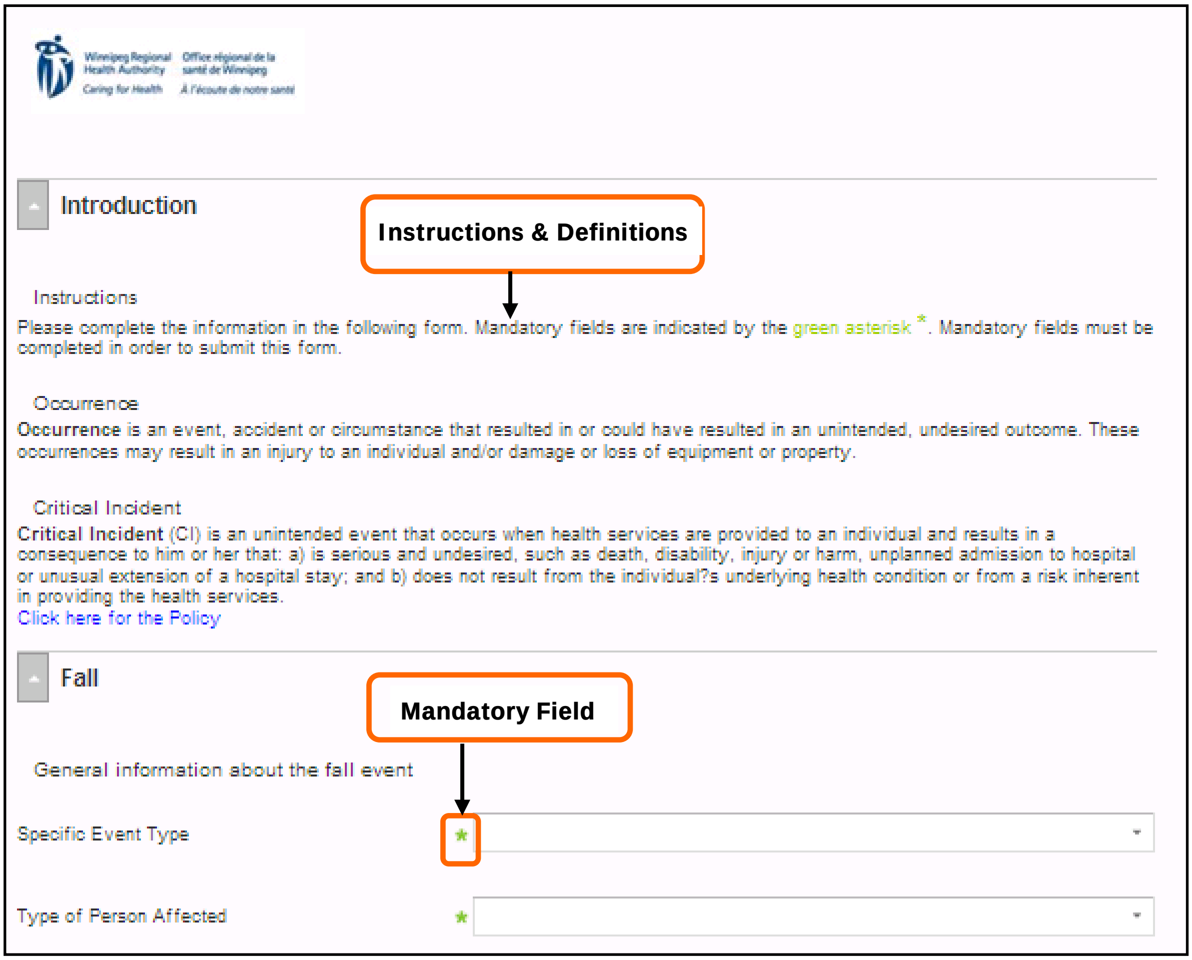
Submission Form Widgets

Widget	Image	Description
Contents		Provides links to the different sections of the submission form. Click the **Fall Details** link, for example, will take you to that section of the form.
Elapsed time **&** **File Status**		**Elapsed time** displays the length of time that the file has been open during its creation. **File Status** shows you how many of the form's fields have been completed. The first bar shows the total # of fields completed. The second bar shows how many mandatory fields have been completed. **In order to submit the file, all mandatory fields must be completed**

FALLS EVENT FORM

(Instructor Demo)

1. Click the **Fall**  icon on the *Icon Wall*.



Winnipeg Regional Health Authority Office régional de la santé de Winnipeg
Caring for Health À l'écoute de notre santé

Introduction

Instructions & Definitions

Instructions
Please complete the information in the following form. Mandatory fields are indicated by the green asterisk *. Mandatory fields must be completed in order to submit this form.

Occurrence
Occurrence is an event, accident or circumstance that resulted in or could have resulted in an unintended, undesired outcome. These occurrences may result in an injury to an individual and/or damage or loss of equipment or property.

Critical Incident
Critical Incident (CI) is an unintended event that occurs when health services are provided to an individual and results in a consequence to him or her that: a) is serious and undesired, such as death, disability, injury or harm, unplanned admission to hospital or unusual extension of a hospital stay; and b) does not result from the individual?s underlying health condition or from a risk inherent in providing the health services.
Click here for the Policy

Fall

Mandatory Field

General information about the fall event

Specific Event Type *

Type of Person Affected *

2. Complete the *Fall-Submission Form* ensuring to fill in all mandatory fields.

3. Click **Submit**.

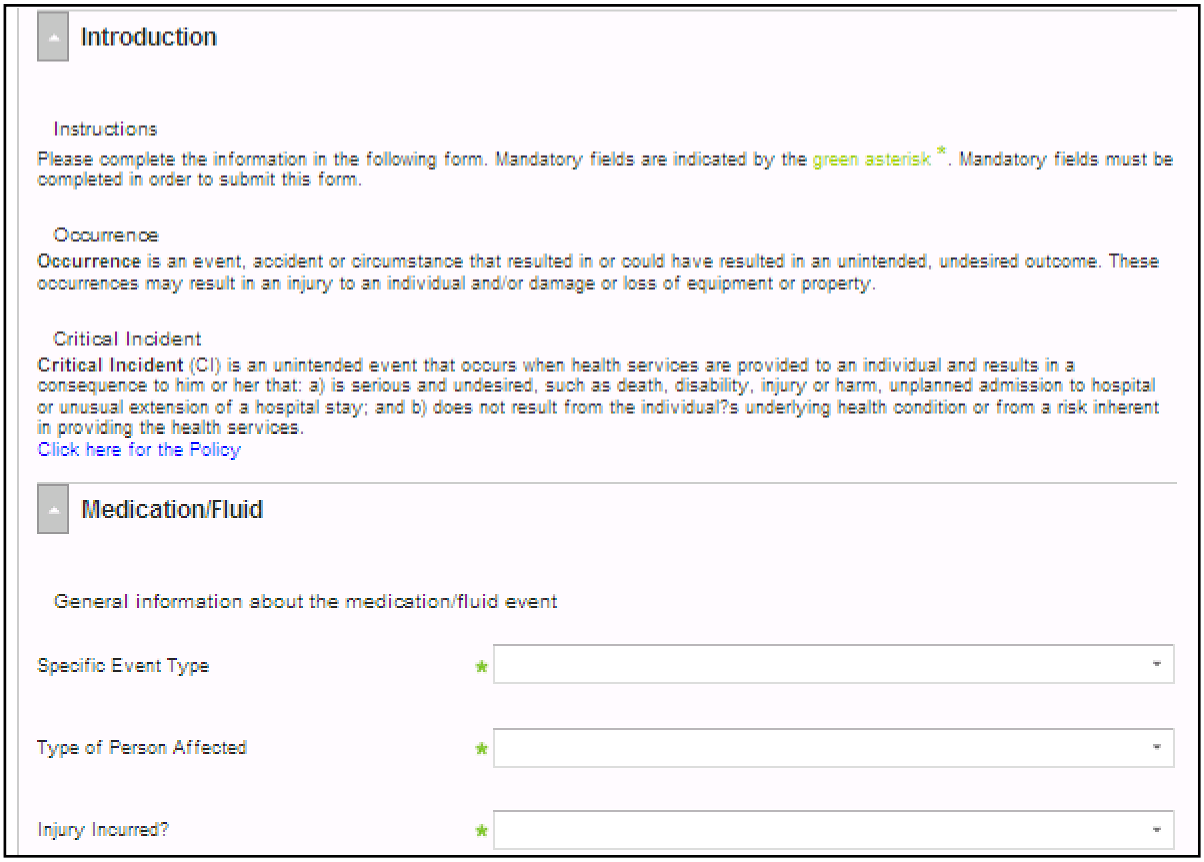
AFTER FORM IS SUBMITTED

Once the form is submitted an alert is automatically sent, via email, to the appropriate manager. It will also appear in the manager's Info Centre within RL6 Risk.
If the person submitting the form indicated it was a critical incident the form automatically goes to the Regional Intake Coordinator.

MEDICATION/FLUID FORM

(Instructor & Class work through example together)

1. Click the **Medication/Fluid**  icon on the *Icon Wall*.



Introduction

Instructions

Please complete the information in the following form. Mandatory fields are indicated by the green asterisk *. Mandatory fields must be completed in order to submit this form.

Occurrence

Occurrence is an event, accident or circumstance that resulted in or could have resulted in an unintended, undesired outcome. These occurrences may result in an injury to an individual and/or damage or loss of equipment or property.

Critical Incident

Critical Incident (CI) is an unintended event that occurs when health services are provided to an individual and results in a consequence to him or her that: a) is serious and undesired, such as death, disability, injury or harm, unplanned admission to hospital or unusual extension of a hospital stay; and b) does not result from the individual?s underlying health condition or from a risk inherent in providing the health services.

Click here for the Policy

Medication/Fluid

General information about the medication/fluid event

Specific Event Type *

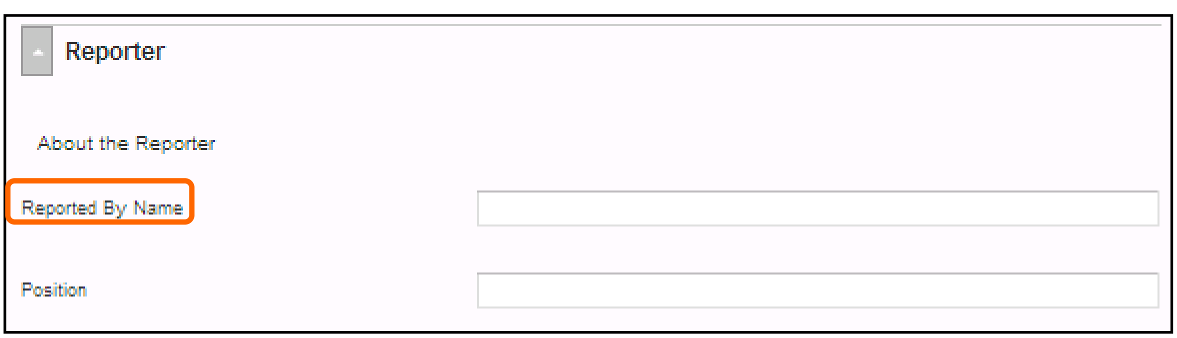
Type of Person Affected *

Injury Incurred? *

2. Complete the *Medication/Fluid – Submission Form* ensuring to fill in all mandatory fields. Use case study #1 on next page.

3. Click **Submit**.

Note: Within the submission form the *Reported By Name* field is an optional field (not mandatory) because the intent is to learn from the events not to instil blame.



Reporter

About the Reporter

Reported By Name

Position

Case Study #1 – Medication/Fluid Event

On March 14, 2013 at 1345, James Smith was administered metformin in the Emergency department. While being monitored, his blood sugar and blood pressure dropped. He required IV dextrose.

Mr. Smith's medications had been administered as per orders on the physician's order sheet. These were based on the patient's home meds. The wrong information was used and the patient received medication that was not his.

- The patient eventually recovered.
- Mr. Smith's date of birth is May 15, 1955.

1. Enter the event details in the appropriate submission form.

2. Submit the completed form.

Case Study #2 - IV/Vascular Access Device Event

On November 24, 2012 at 0745, Mary Dobbin was administered metformin in the Emergency.

The patient had an intravenous (IV) that went interstitial at 1600 hrs. The IV was infusing heparin. The IV was re-established in the right hand. At 0230 on November 24th, the patient got up and accidentally pulled out this IV. The IV was re-established in the left arm again. At 1330, the left arm was noted to be swollen with a lot of bruising from the top of her arm to her forearm. The patient was experiencing a great deal of pain and had decreased range of motion. The IV was stopped and re-established in the right arm. Compartment syndrome was ruled out.

- The patient has ongoing pain and a limited range of motion.
- Ms. Dobbin's date of birth is August 20, 1946.

1. Enter the event details in the appropriate submission form.

2. Submit the completed form.

Case Study #3 – Skin/Tissue Event

During the course of care the patient Michael Jones fell and fractured a hip, requiring uneventful surgery. On January 19, 2013 (6 days post surgery) bilateral black heel ulcers were noted on the patient's heels when the support stockings (TED) were removed during morning care. Skin care was immediately put into place and the change was not expected to delay discharge.

- The patient had a blackened heel. This was noticed during a bed bath. A wound care consult is pending. Heel boots are being applied.
- Mr. Jones' date of birth is November 2, 1933.

1. Enter the event details in the appropriate submission form.

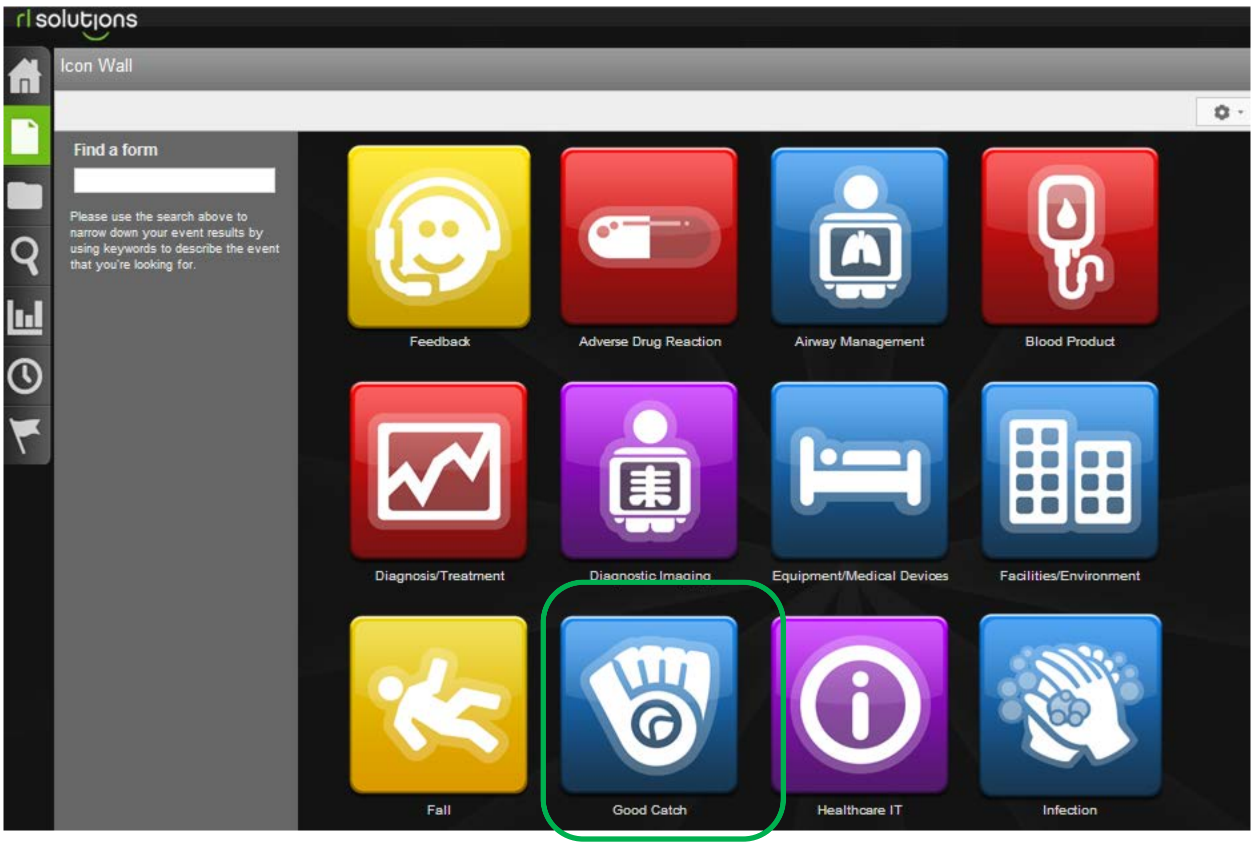
2. Submit the completed form.

NEAR MISS/GOOD CATCH

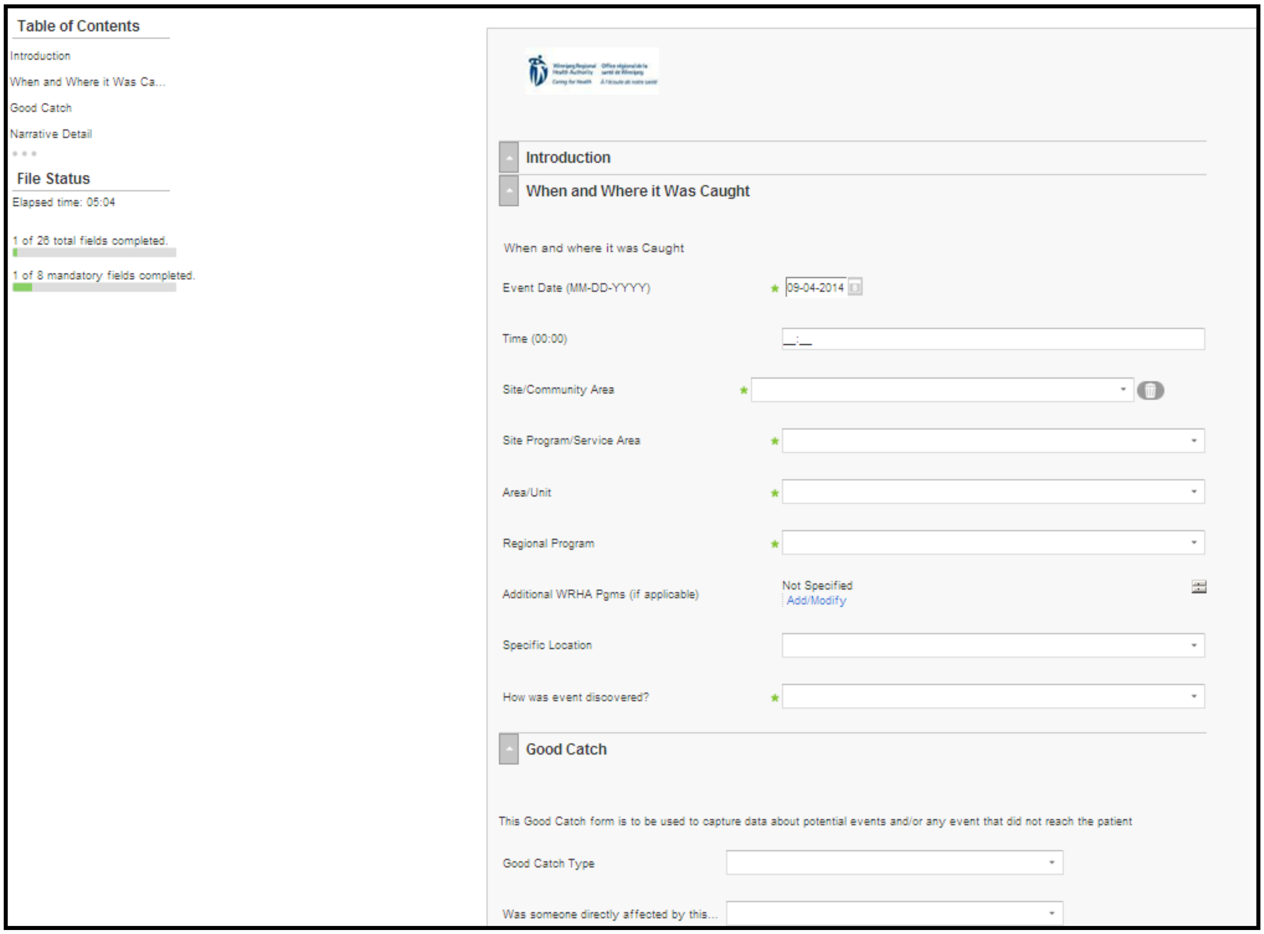
A Near Miss/Good Catch is an event or situation that took place, and could have resulted in an unintended outcome, but was “caught” before reaching the patient and adversely impacting the patient.

We have an opportunity to **“Catch it to Prevent it in the Future”.**

1. Double-click on the **Good Catch**  icon.



The Good Catch Submission form opens.



2. Complete the form ensuring all mandatory fields are entered (fields with a green *). Please provide as much information as possible in non-mandatory fields.

3. Click the **Submit** button.

   Once the form is submitted the file reference number appears on the screen. After the report is submitted you cannot add additional information to it. If you want to follow-up on the form or add additional information you can reference the file number with your manager.

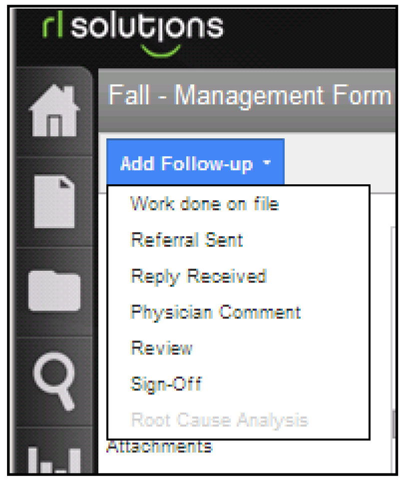
WORKING WITH FOLLOW-UP ACTIONS

There are different types of follow-ups that can be added to a file. They may only be added through the Follow-up Actions widget. All follow-up types have areas where circumstances, descriptions and attachment can be entered.

Note: A convenient way to manage the follow-up actions on a file is to enter in your actions/notes in the Work Done on File section of the file.

1. Ensure the file is open.

2. Click the **Add Follow-up** button; select the type of follow-up you would like to add (e.g. Work done on file).



3. Enter in your follow-up information.

4. Click **OK**.

ASSIGNING TASKS

(Use this function is implementer has access to RL6)

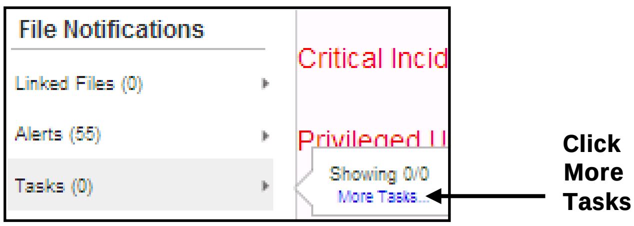
You can assign a task to an implementer to follow up on a file. When you assign a task to someone it gives them temporary access to the file. When you assign a task you can determine the amount of time that the implementer will have access to the file. If you wish, you can also send an automatic follow-up reminder to them regarding their task.

1. Click the  **Info Center** icon on the *Navigation* toolbar.

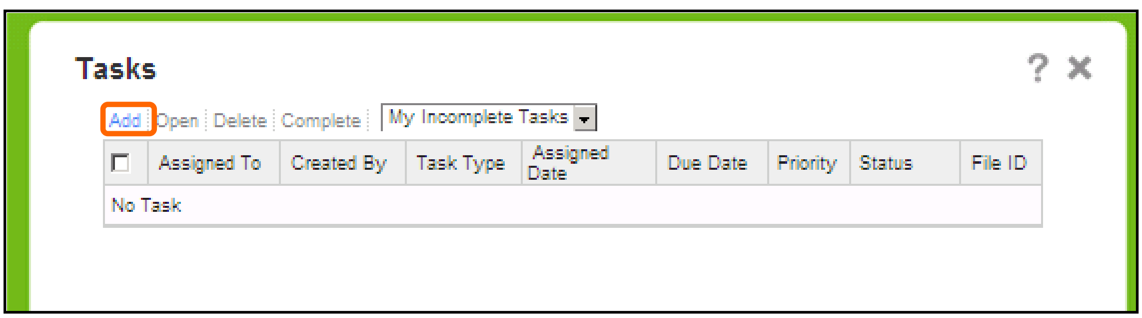
2. Select the file that you want to task the manager/director with.

3. Click the **Open** link at the top of the file list.

4. Click **Tasks** from the *Tasks* widget at the left-hand side, and select the **More Tasks** link.

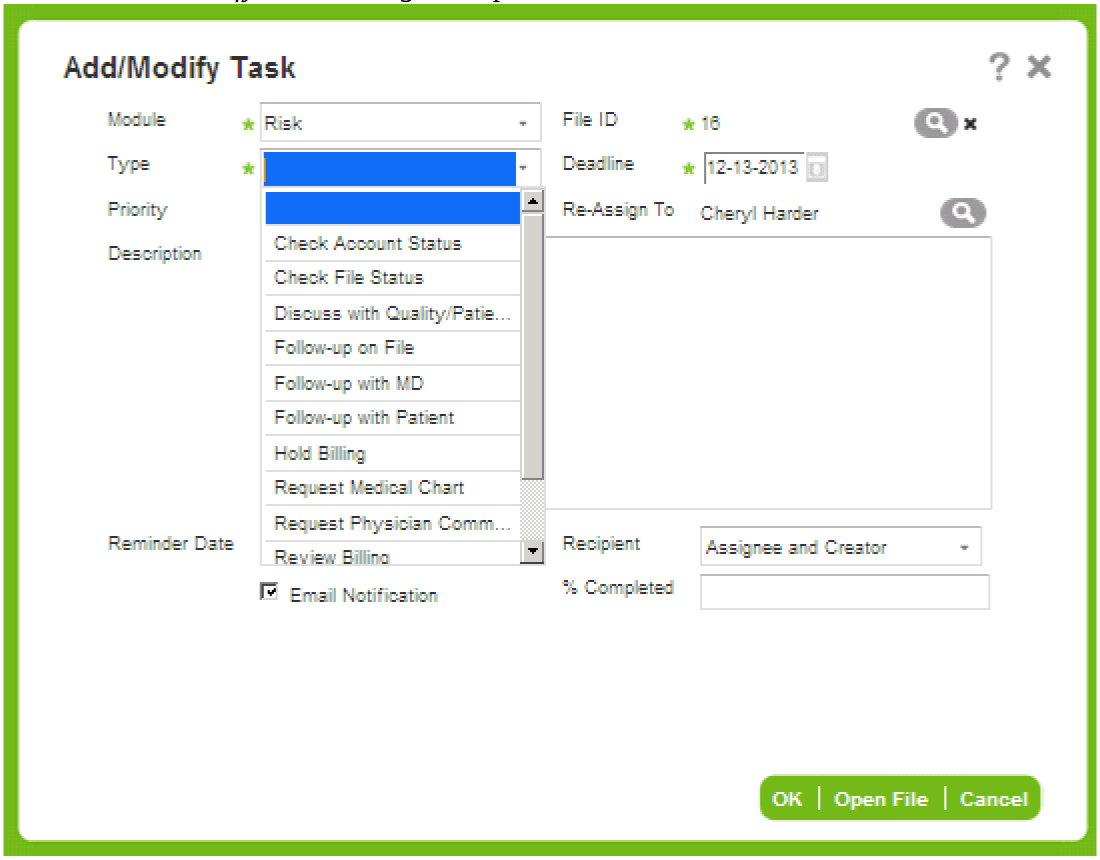


The Tasks dialog box opens.



5. Click **Add** from the *Tasks* dialog box.

The Add/Modify Task dialog box opens.

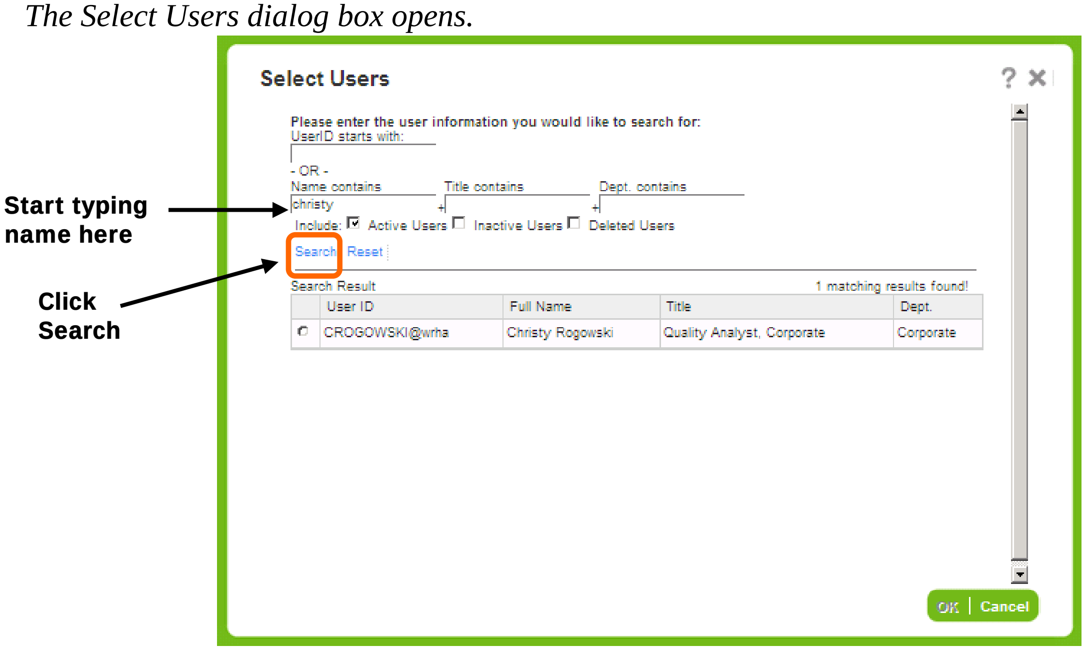


6. Select the type of task (e.g. Follow-up on File, Review File) from the *Type* drop-down list.

7. Complete the appropriate fields (Description, Deadline, Priority and Reminder Date).

8. Click the  icon next to the *Re-Assign To* field to find the person you want to assign the task to.

The Select Users dialog box opens.



9. Enter the first few letters of the person's name in the *Name contains* text box.

10. Click **Search**.

11. Select the person you want to assign the task to, and click **OK**.

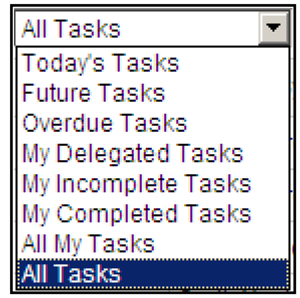
12. Click **OK**, and click **Close**.

> **Note:** RL6 will send an alert to the person letting them know of the task, but it is always good to connect with the person you need to work with as well.

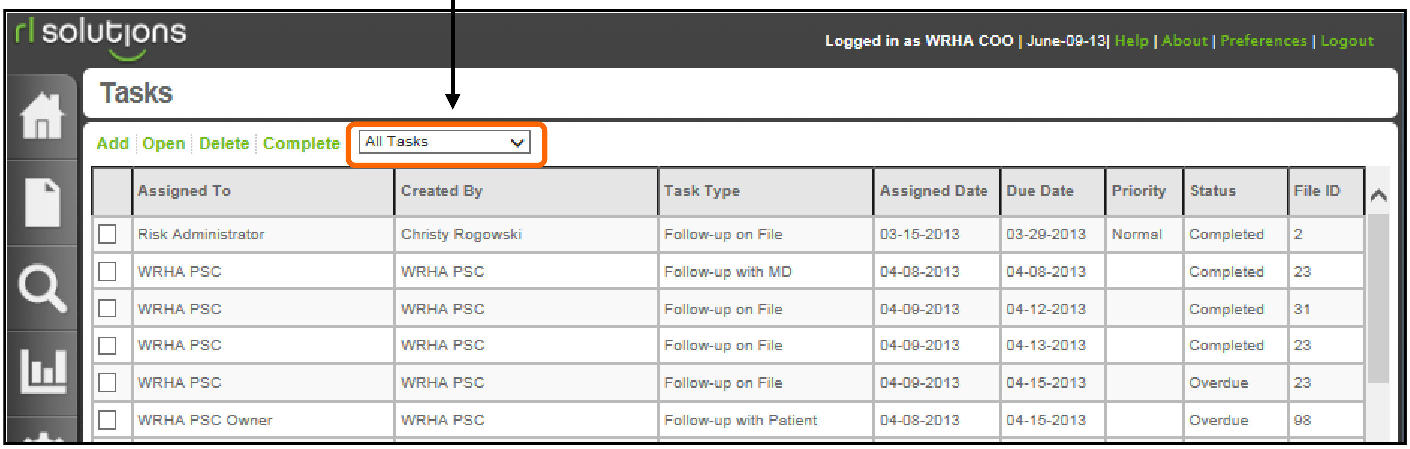
Checking Status on Tasks

You can check the status of tasks you have assigned to others to see if they are complete or overdue.

1. Click the **Tasks** icon on the *Navigation* toolbar.
2. Select the Task status to view.



Select the Task status to view



Completing Tasks

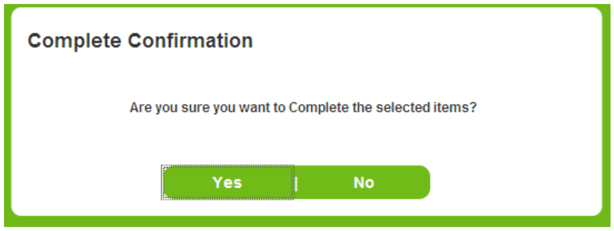
When you complete a task that was sent to you, and mark it as complete, the file leaves your *My Tasks* area in the Info Centre and you will no longer receive task reminders. A message is NOT sent back to the originator of the task that it is now complete.

1. Click the **Task** icon on the *Navigation* toolbar.
2. Select the task that you have completed.
3. Click **Complete** from the top menu bar.

Select Complete

The *Complete Confirmation* dialog box opens.

4. Click **Yes**.

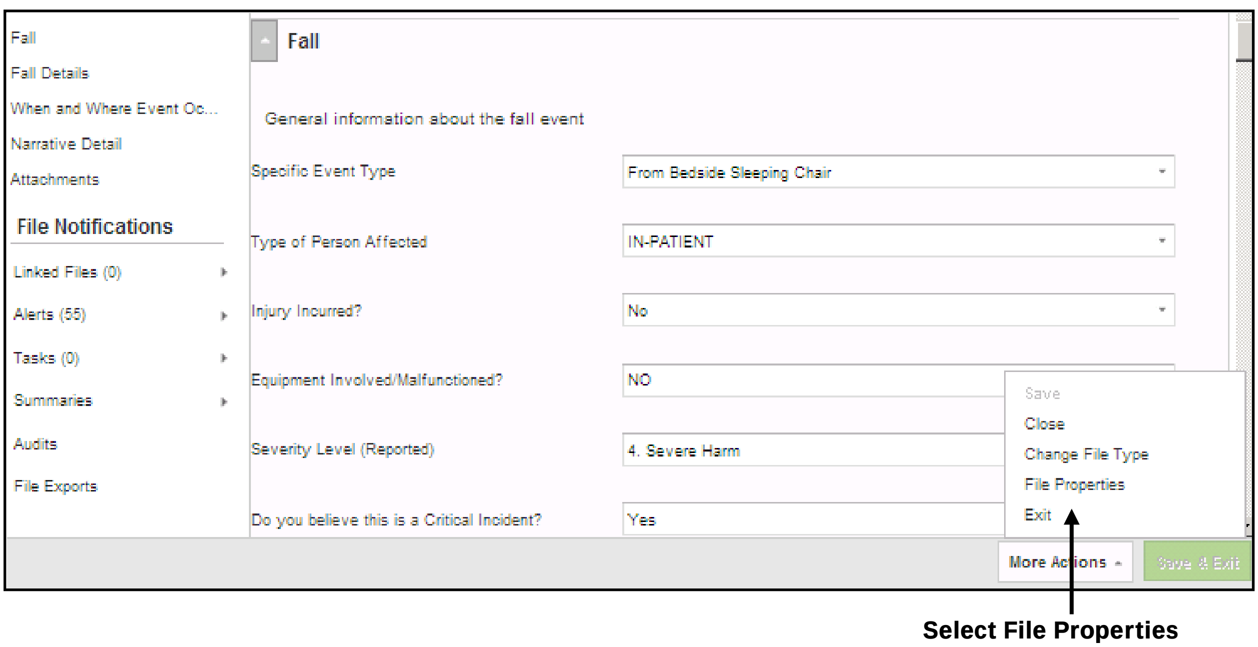


The task in removed from your *My Tasks* area in the *Info Center*.

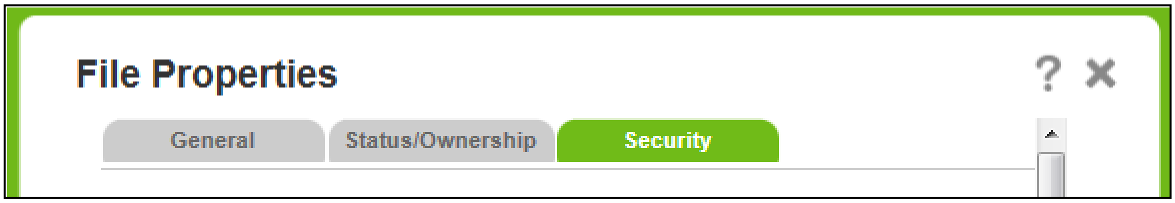
GRANTING ACCESS TO FILES

If you want someone to have access to the file, such as to another manager in different program, you would grant them access to the file for a period of time.

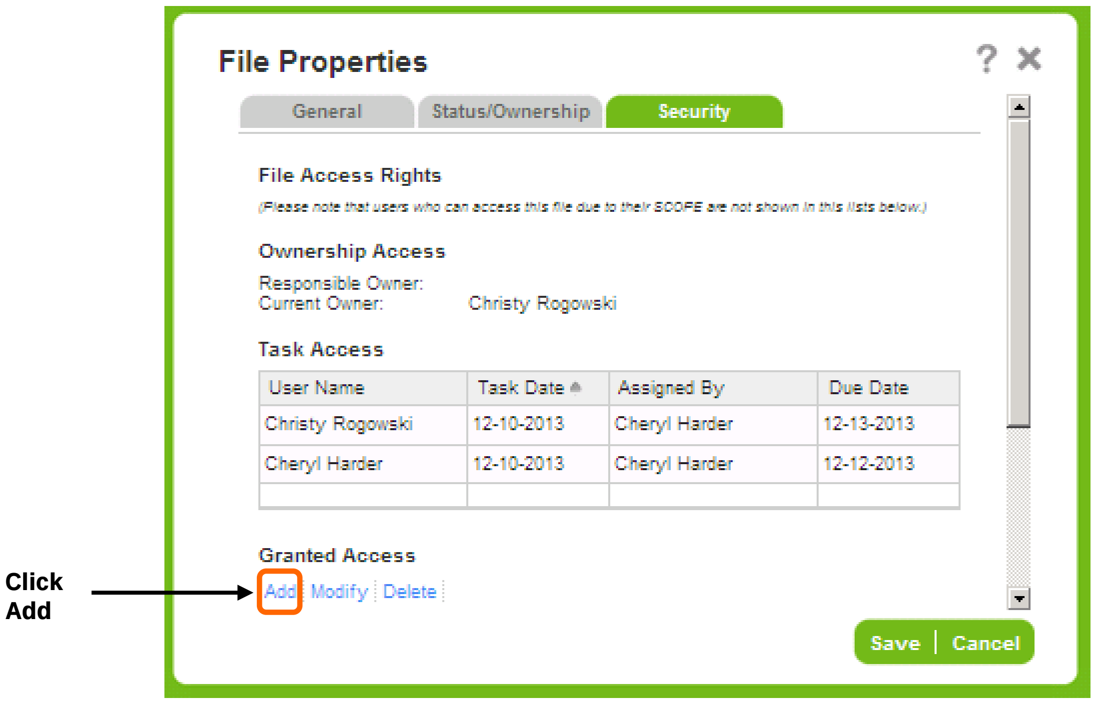
1. Click the **Info Center** icon on the *Navigation* toolbar.
2. Find the file that you want to grant access to.
3. Select that file; click the **Open** link at the top of the file list.
4. Click the **More Actions** button and select **File Properties**.



5. Select the **Security** tab.

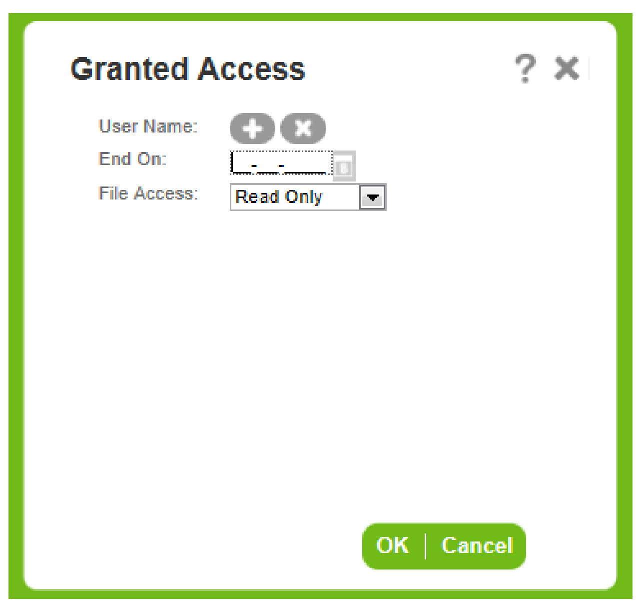


6. Click **Add** in the *Granted Access* section of the *File Properties* dialog box.

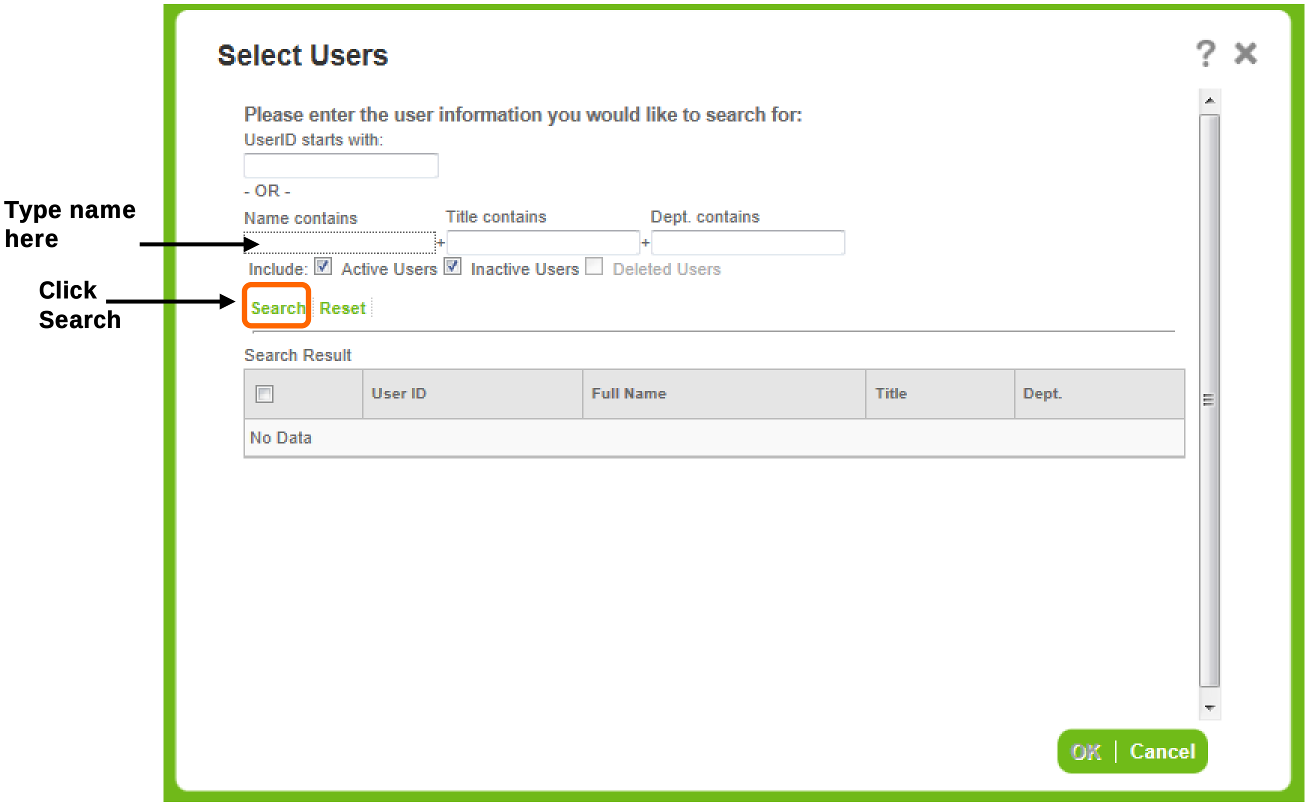


The Granted Access dialog box appears.

7. Click the  beside the **User Name** field.



The Select Users dialog box opens.

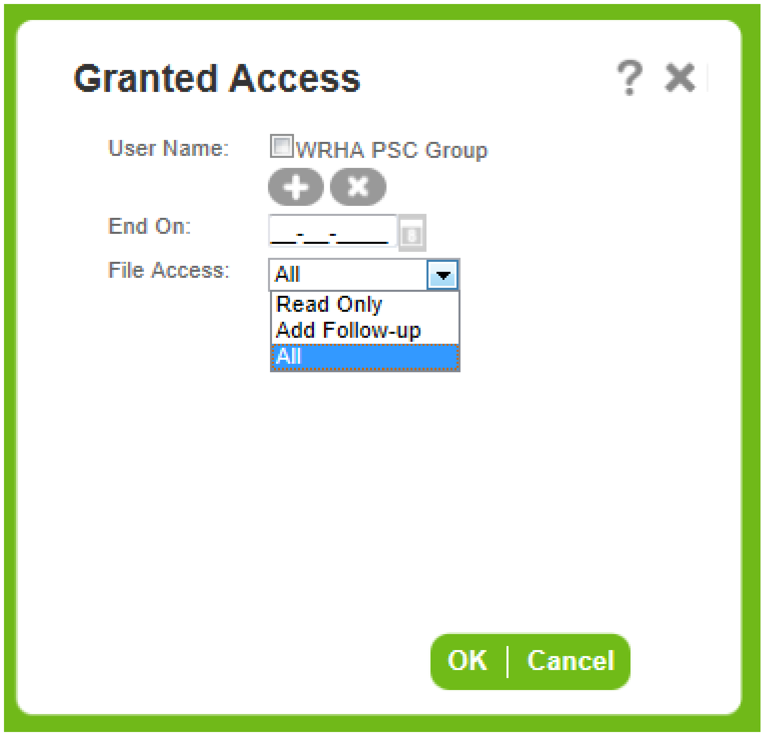


8. Enter the first few letters of the person's name in the *Name contains* text box.

9. Click **Search**.

10. Select the person you want to grant access to, and click **OK**.

11. Select the level of access from the *File Access* drop-down box.
    Most likely you will select **All** to allow all work to be added to the file.

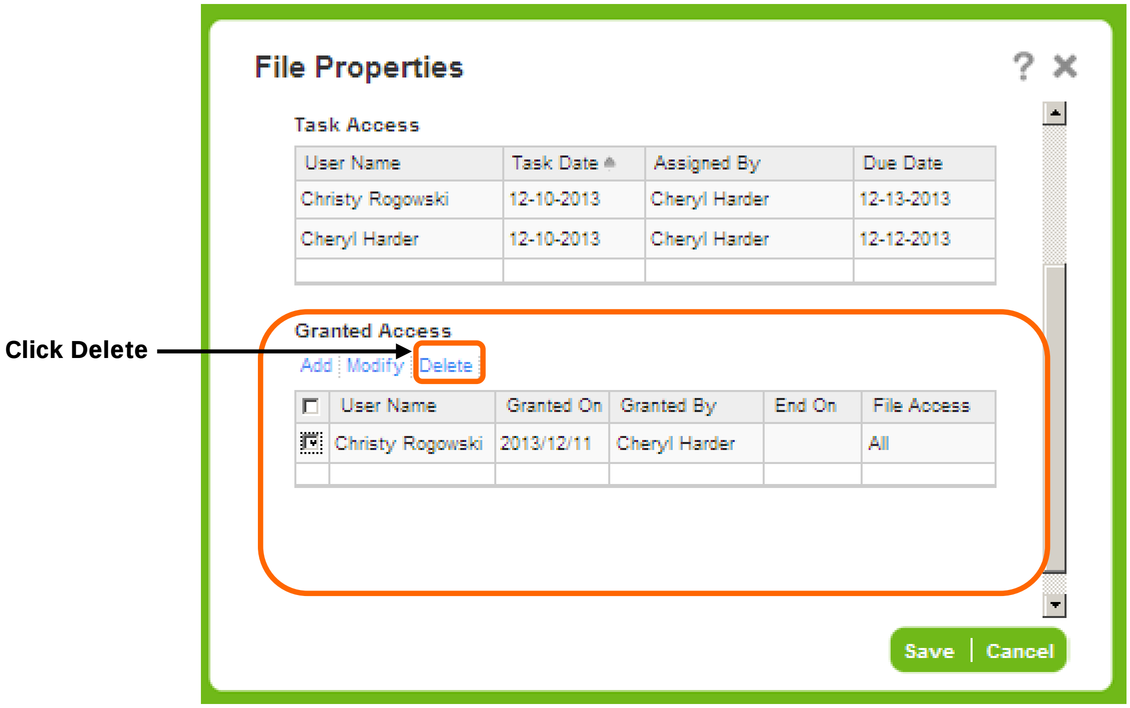


12. Click **OK**, and click **Save** and **Save & Exit**.

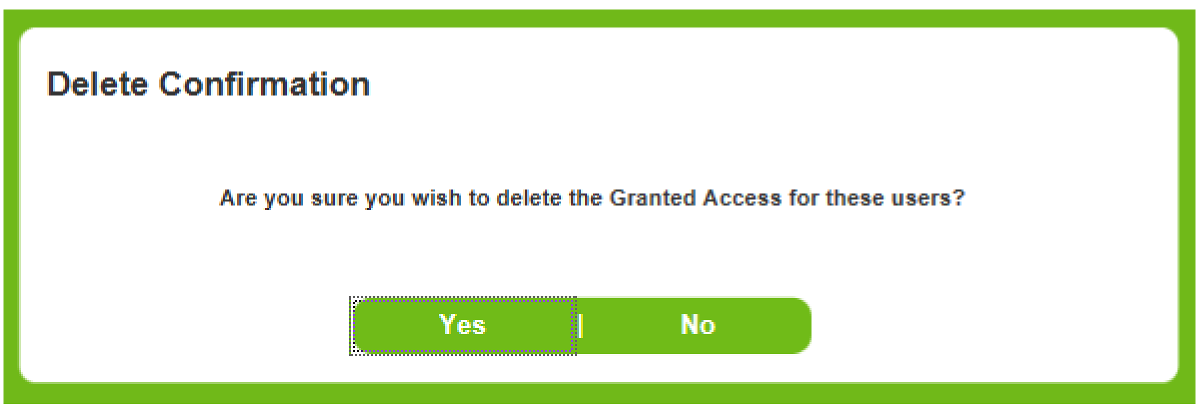
Note: RL6 will NOT send an alert to the user letting them know they have been granted access, so, it is a good idea to connect with the person you have granted access to.

Removing Access from a File

1. Click the **Info Center**  icon on the *Navigation* toolbar.
2. Find the file that you want to remove a user’s access from.
3. Select that file; click **Open File** at the top of that menu bar.
4. Click the **More Actions** button and select **File Properties**.
5. Click the **Security** tab.
6. Select the user you want to remove access from.



7. Click **Delete**.
   The Delete Confirmation box opens.

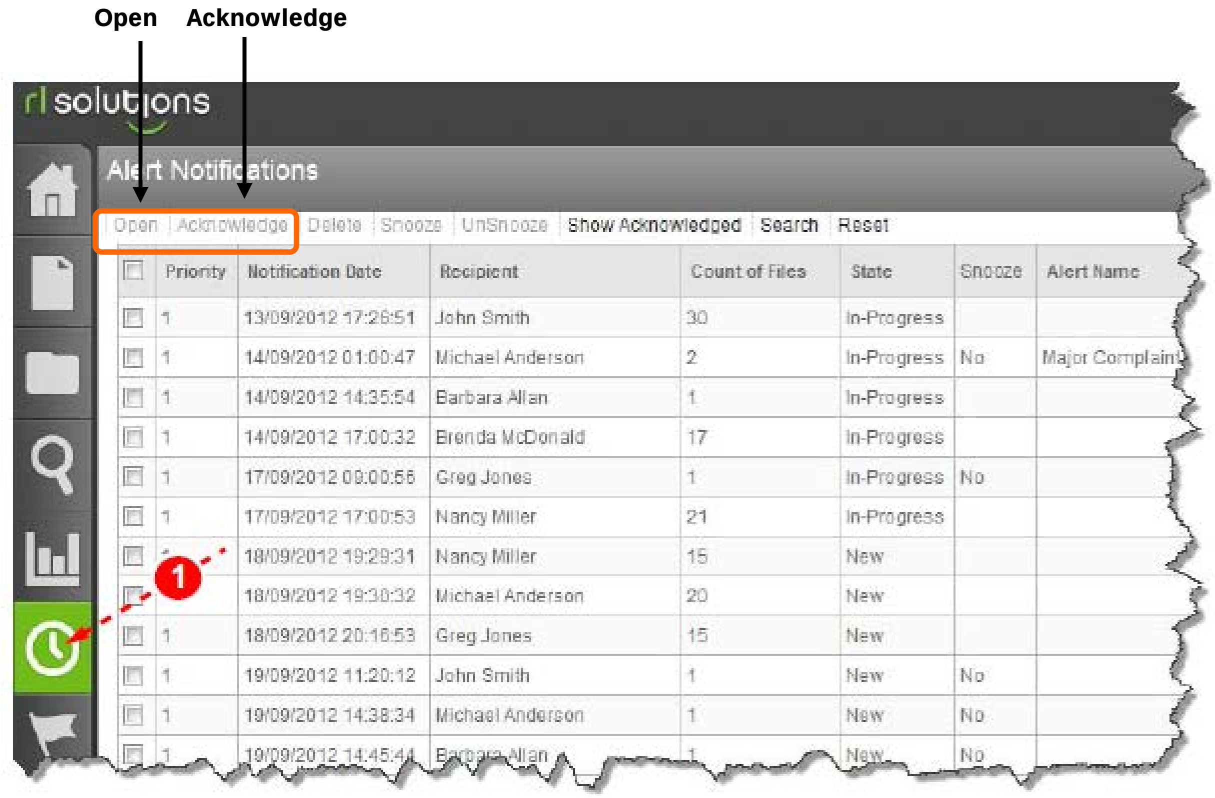


8. Click **Yes** to delete granted accesses to the selected user.

9. Click **Save**, click **Save & Exit**.

WORKING WITH ALERTS

Alert notifications help you manage your files and identify trends more effectively by providing timely notice when a set of conditions is met. The alert notification is emailed to you but can always be seen from the Alert Notification page.



Before opening an alert notification, it has the status **New**. Once opened, the status become **In-Progress**. When finished with the notification, you can change the status to **Acknowledged** or delete the alert.

Viewing Alerts

1. Click the box next to the alert notification you would like to view.

2. Click **Open**.

3. If you would like to view the alert details, click the **More Details** link.

Acknowledging an Alert

Acknowledged alert notifications are hidden in the initial result list. This is a good way to manage your notification, keeping the result list from becoming cluttered and retaining a record of the alert in case you need to refer to it later.

An alternative way to manage your notifications is to delete them when they are no longer needed.

1. Click in one or more boxes next to the alert notifications you would like to acknowledge.

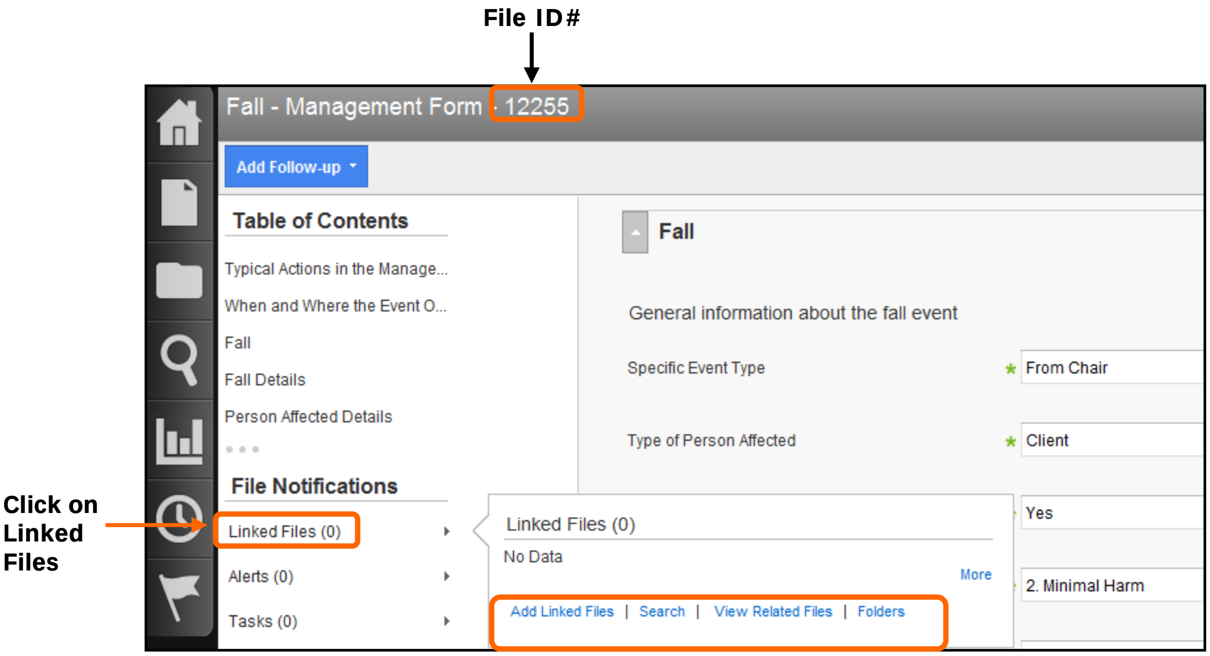
2. Click **Acknowledge**.

3. Click **Yes** to confirm. The page is refreshed and the acknowledged alert(s) no longer appear in the list.

LINKING ONE OCCURRENCE TO ANOTHER

The *Linked Files* feature provides you the ability to create hyperlinks between multiple files. It is a convenient way to associate two or more files that share similar traits. Once files are inter-connected, you can jump from file to another with single click. For example, a group of files for the same patient/ client/resident could be linked to one another for a subsequent review or analysis of that person's incidents (i.e. their cluster of files).

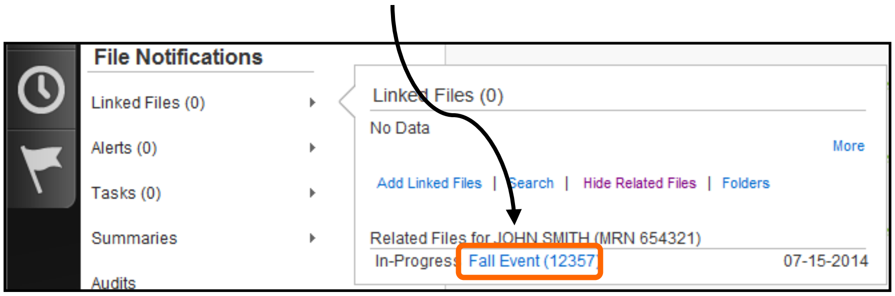
1. Click on the **Linked Files** in the *File Notifications* section.



A Pop-up dialogue box will appear with the following choices:

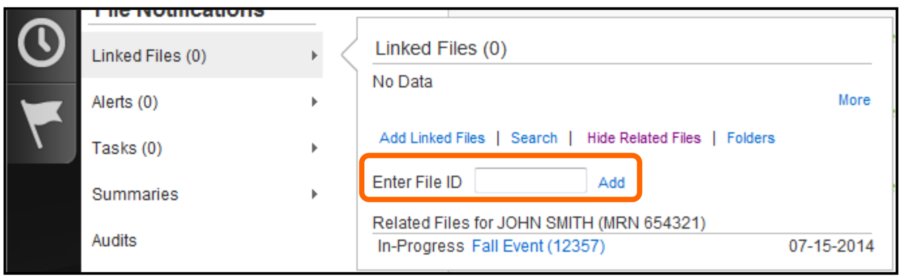
- **Add Linked Files** – Will prompt you for the File ID of the incident to link to the current file (e.g. the File ID for the above example is '12255'. This ID can be seen at the top of the form.)
- **Search** – This particular search function is not user friendly. Do not use.
- **View Related Files** – Will find all files that have the same MRN and patient last name as in the current file.
- **Folders** – This feature is not currently being used.

To search for other incidents that have the same Patient Name and MRN (chart number), click on **View Related Files**. The Pop-up dialogue box will show a list of any incidents for that person. In the example below, the results show another file has been entered for this person. That incident's File ID is '**12357**'.

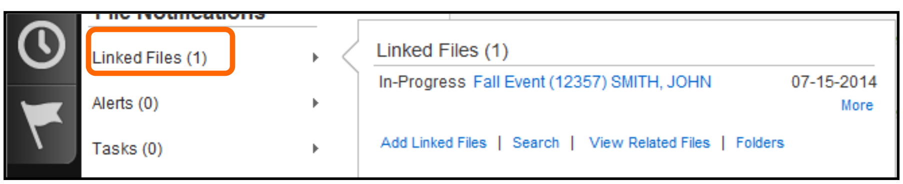


To add a link from the current file (File ID 12255) to the related file (File ID 12357):

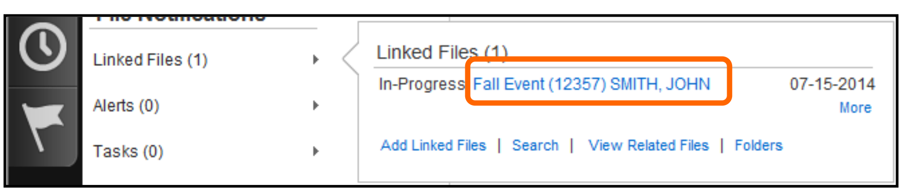
1. Click on **Add Linked Files**.
2. Type the related File ID into the *Enter File ID* box (e.g. 12357).
3. Click on the **Add** button.



The system now shows that a linked file has been added to this incident.



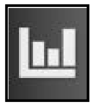
To move from the current file (#12255) to the linked file (#12357), click on the blue text within that row.

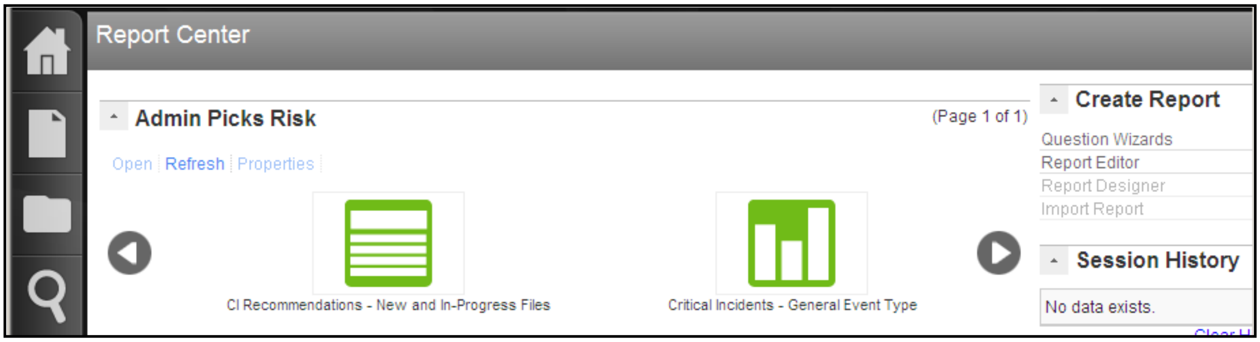


Both incidents are now linked to each other. Each file has its own link to the other incident. This will allow you to move quickly back and forth between linked files.

WORKING WITH REPORTS

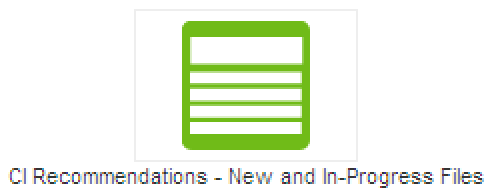
You can view a report that displays the CI Recommendation – New and In-Progress Files that are within your scope.

1. Click the **Report Center**  icon on the *Navigation* toolbar.



The Report Center dialog box opens.

2. Double-click o the **CI Recommendation – New and In-Progress Files** report icon.



The CI Recommendations – New and In-Progress Files report displays.

View the Status of the file

CI Recommendations - New and In-Progress Files

All dates

FileNr: INC_16	General Event Type: Fall

Recommendation	Recommendation Site/Community Area	Recommendation Regional Program	Status	Person Responsible for Recommendation	Person Assigned	Expected Completion Date
Review Policy	Deer Lodge Centre	Rehab/Geriatrics	Not Started	Candice Holden-Piush	Christy Rogowski	01-31-2014
Education regarding Fall Procedure	Deer Lodge Centre	Rehab/Geriatrics	In Progress	Dan Painter	Gerry Taylor	02-28-2014

FileNr: INC_52	General Event Type: Medication/Fluid

Recommendation	Recommendation Site/Community Area	Recommendation Regional Program	Status	Person Responsible for Recommendation	Person Assigned	Expected Completion Date
Review Policy	Grace Hospital	Medicine	Not Started	Dan Painter	Christy Rogowski	01-31-2014
Education regarding Medication Orders	Grace Hospital	Medicine	In Progress	Dan Painter	Christy Rogowski	02-28-2014

Opening a File from a Report

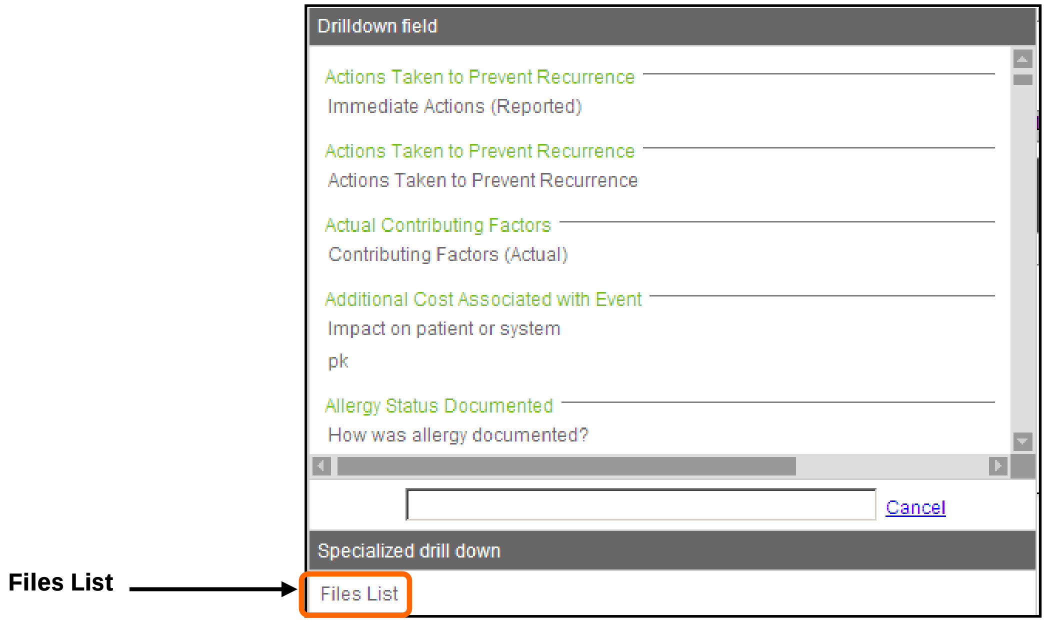
In the report view you can open a file to see more information.

1. Hover your mouse on the last row of the report you would like to open.
   Your mouse pointer changes into a  *drill.*

FileNr: INC_16	General Event Type: Fall

Recommendation	Recommendation Site/Community Area	Recommendation Regional Program	Status	Person Responsible for Recommendation	Person Assigned	Expected Completion Date
Review Policy	Deer Lodge Centre	Rehab/Geriatrics	Not Started	Candice Holden-Piush	Christy Rogowski	01-31-2014

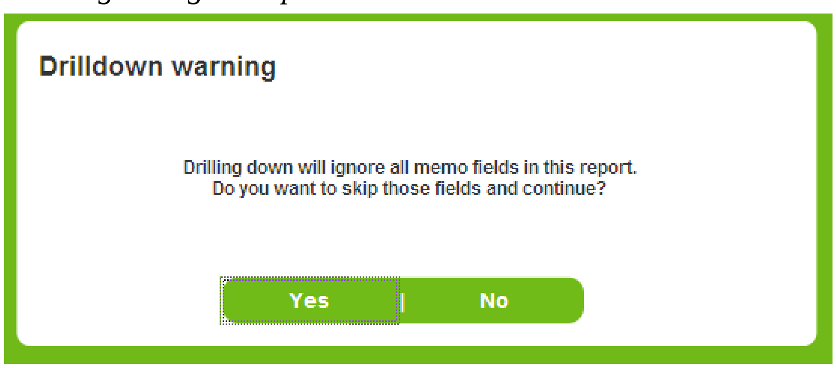
2. Click on any field in the last row of the report.
   The Drilldown field dialog box opens.



3. Click the **Files List** selection from the dialog box.

4. Click on any column in the report.
   Your mouse pointer changes into a  *drill.*

   The Drilldown warning dialog box opens.



5. Select **Yes** to ignore all memo fields.

6. Select **Open file** from the drop-down box.
   The file opens for you to review.