McLaren MEDICAL GROUP

A QUICK REFERENCE GUIDE: Incident Reporting for Managers and Directors

Do you have more information to add, or should there be more details provided?

Yes

Add or change (if needed) any information in the file.

Once you have entered the additional information, go the "Add Follow-Up" (blue box), and select "work done on file".

Add Follow-up: Summarize what you did on file, any follow up done, details of follow up.

No

Is the Resolutions and Outcomes section completed?

No

Fill them out, leaving the last box, "resolution comments" blank.

Go to "Add Follow-up" (blue box), and select "work done of file".

Yes

Go to "Add Follow up" (blue box) and select "sign-off".

Sign Off: Once all required info has been entered, all appropriate follow up has occurred and has been entered into the file, we can sign off.

Recommendations for System Improvement: Ask yourself, "how can this event be prevented in the future?" Fill in appropriate suggestions.

Add Follow-Up (blue box): Any time *any* information is added or changed, we must note who has added or changed it, and what work was done – *see work done on file*.

We must also **sign-off** once the file has been reviewed, completed, and appropriate follow up actions have occurred and been recorded – *see sign-off*

Work done on file: this is used to show *what* was done to the file and *who* worked on the file. Please provide a brief description of the work that was done.

Directors: if you would like to give the responsibility to your operations manager's to do all follow up actions on incident reports, you can **task** them within the program, and sign-off.

Tasking: you can receive tasks or send tasks; this is our way of tracking all work done on the files. If you receive a task, you will receive an e-mail notification with the explanation. You can also send them to other people who you would like to work on the file (i.e director tasking manager to follow up).

Complete Task: Once you have completed an assigned task, please go to File Notifications located on the left side of your screen. Choose, tasks, more tasks, then select the small box next to your name, and select "complete".