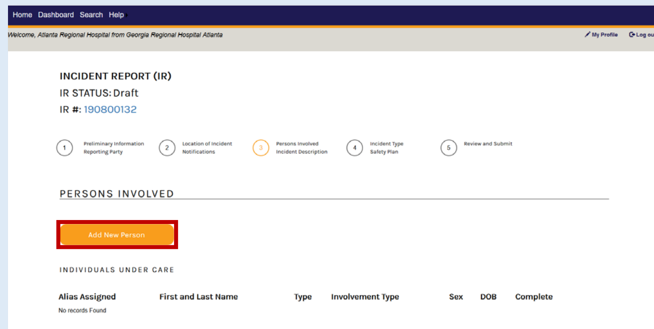
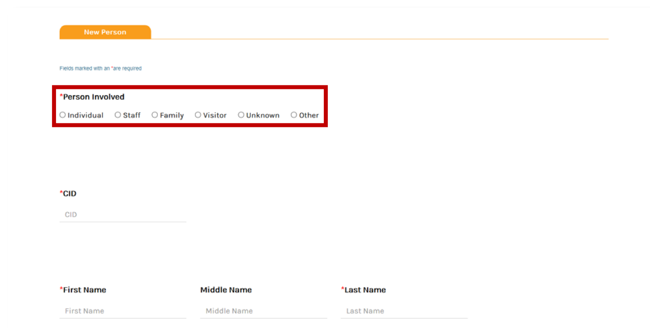
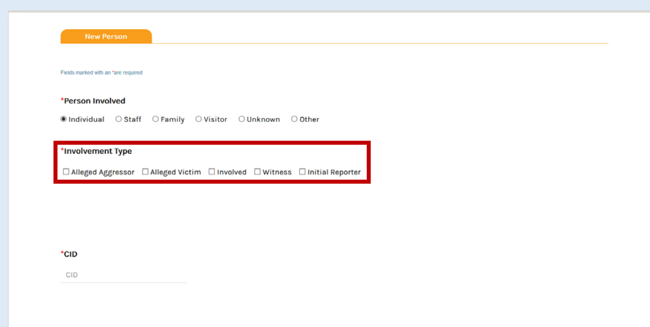
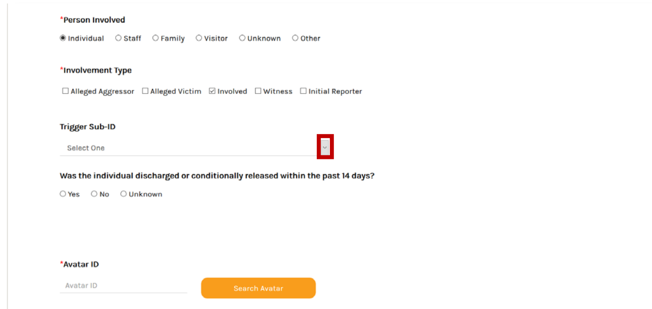
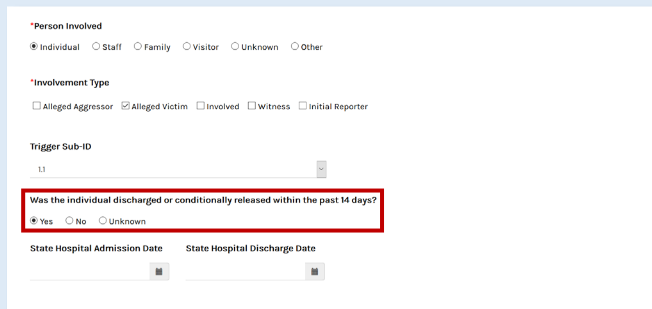
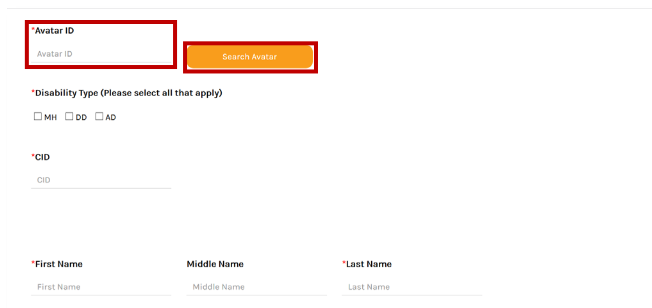
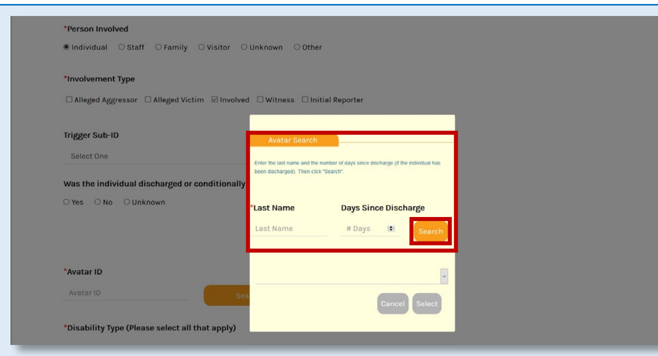
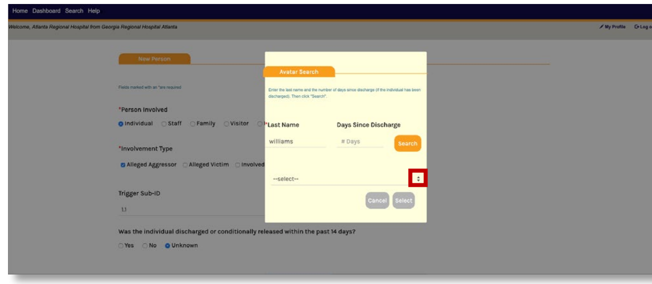
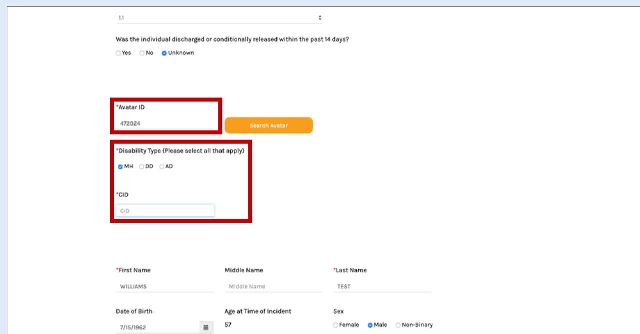
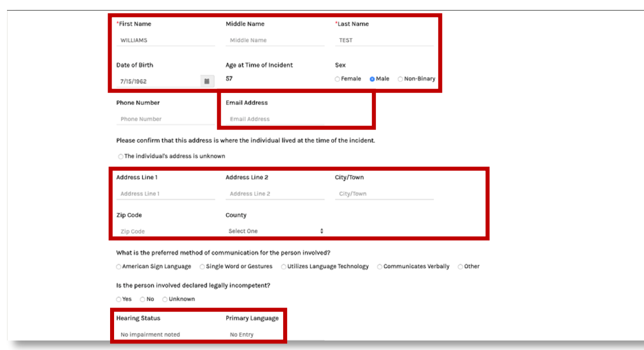
Stage 3: Persons Involved and Incident Description

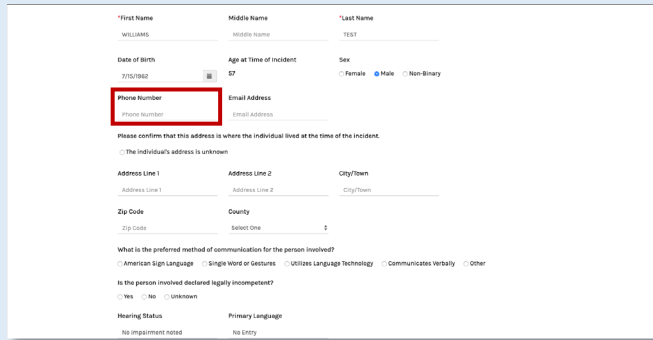
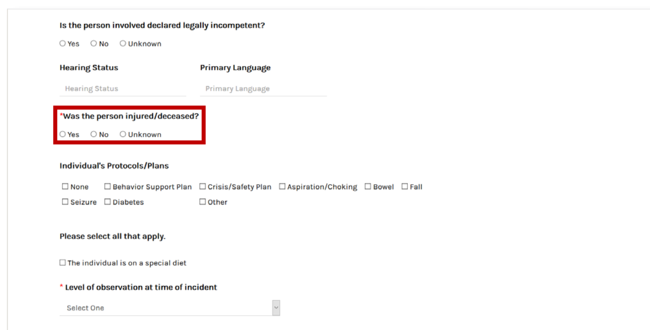
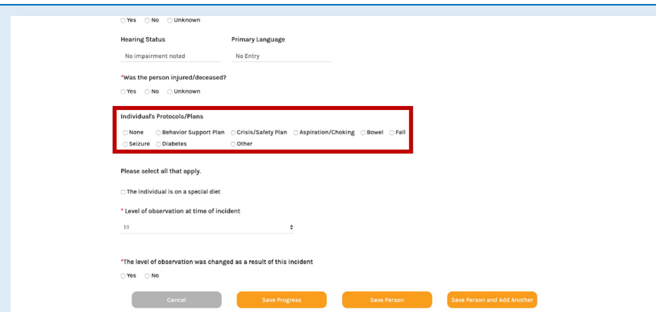
SUMMARY

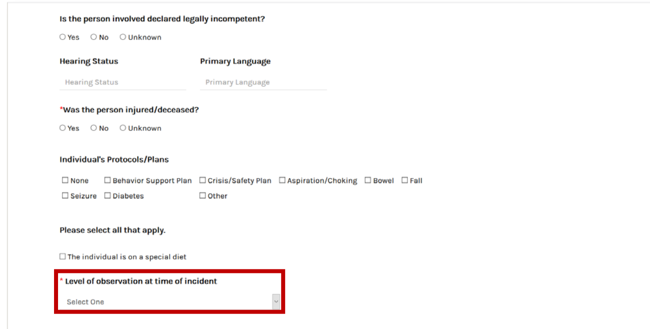
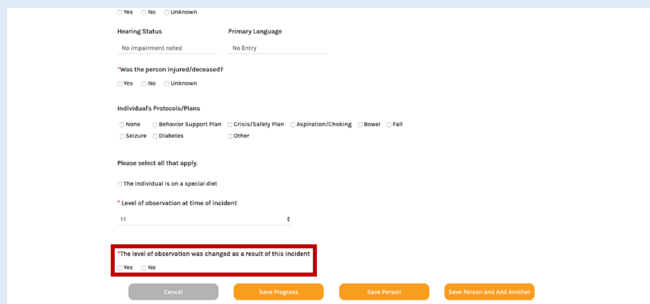
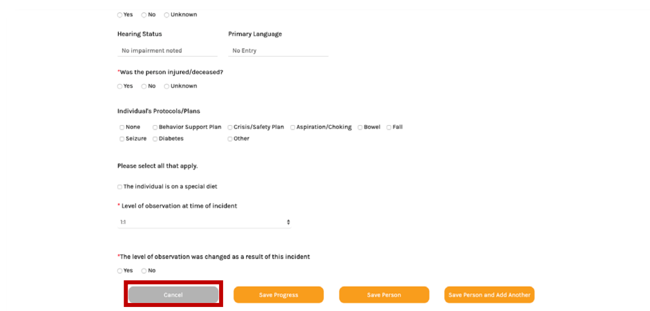
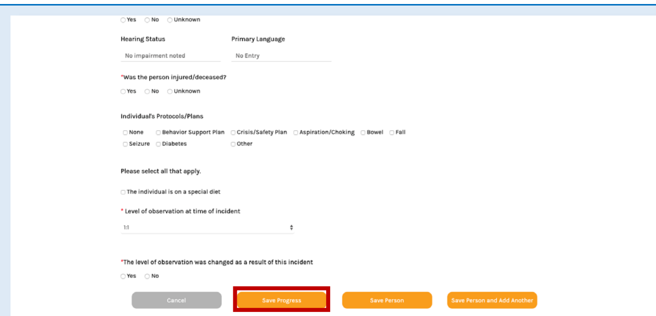
This job aid covers the third of five stages about how to Create an Incident Report in Image. The following steps will cover Stage 3, Persons Involved and Incident Description.

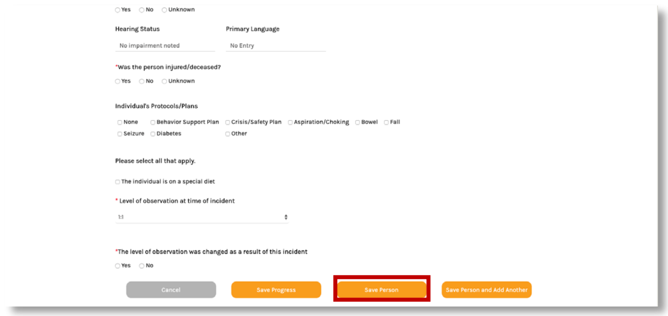
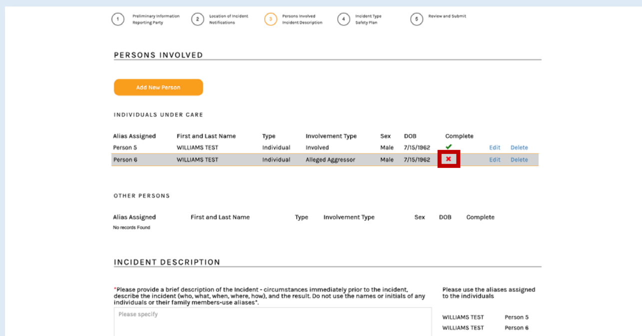
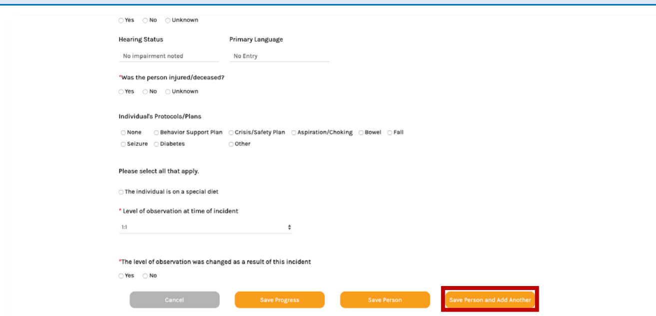
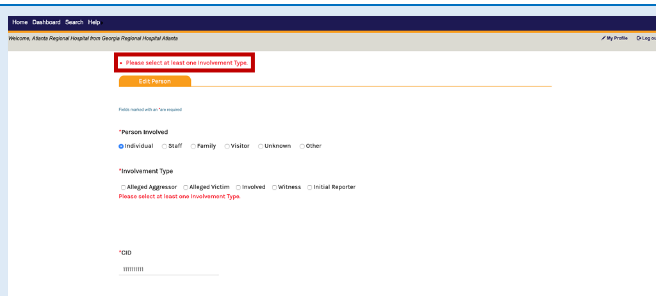
Step	Action	Visual
1	In the **PERSONS INVOLVED** section, select the **Add New Person** button.	
2	The system will navigate to a new page where you will enter the details about each person who was involved in the incident. There are six **Person Involved** options: **Individual, Staff, Family, Visitor, Unknown,** and **Other**. Indicate the person involved in the incident by selecting one of the options.	
2a	If the **Person Involved** is an **Individual**, indicate his or her **Involvement Type** by selecting any of the following options: **Alleged Aggressor, Alleged Victim, Involved, Witness,** or **Initial Reporter**. Multiple **Involvement Types** for an Individual involved can be selected. There must be at least one Individual involved in the incident.	

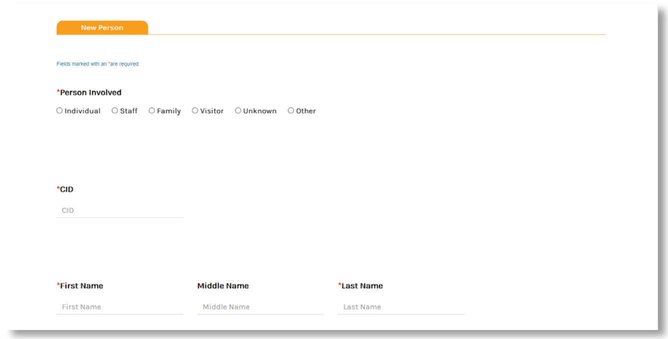
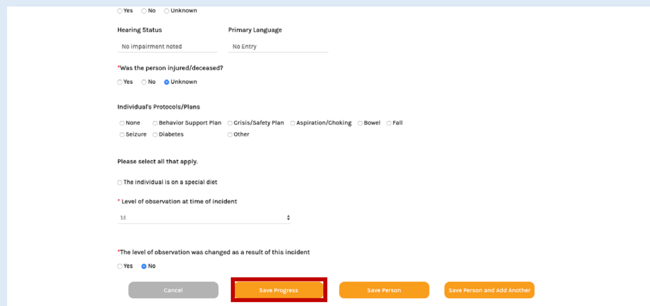
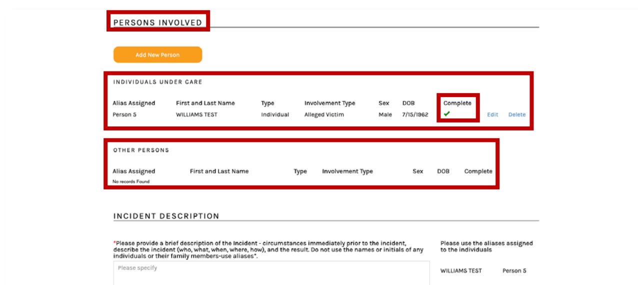
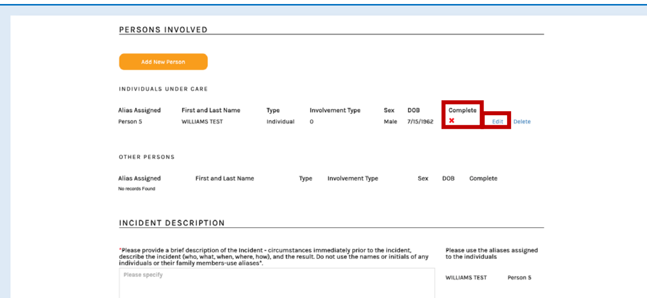
Step	Action	Visual
3	If the Individual is an **Alleged Aggressor, Alleged Victim,** and/or **Involved,** Select the **drop-down arrow** in the **Trigger Sub-ID** field and choose the appropriate option from the list. The **Trigger Sub-ID** field is optional.	
3a	Select the **Yes**, **No,** or **Unknown** radio button for the **Was the individual discharged or conditionally released within the past 14 days?** field. **NOTE:** If **Yes** is selected, use the **calendar** icons in the **State Hospital Admission Date** and **State Hospital Discharge Date** fields, and document the State Hospital Admission and Discharge Dates.	
3b	If you know the Individual's Avatar ID number, enter it in the **Avatar ID** field. If you do not know the Individual's Avatar ID number, select the **Search Avatar** button to the right of the **Avatar ID** field.	
3c	In the **Avatar Search** popup window, enter the Individual's last name in the **Last Name** field. If the Individual has been discharged, enter the number of days since discharge in the **Days Since Discharge** field. Select the **Search** button.	

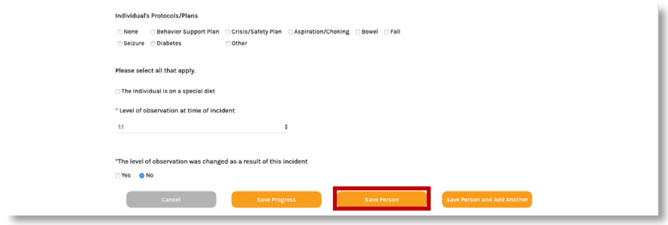
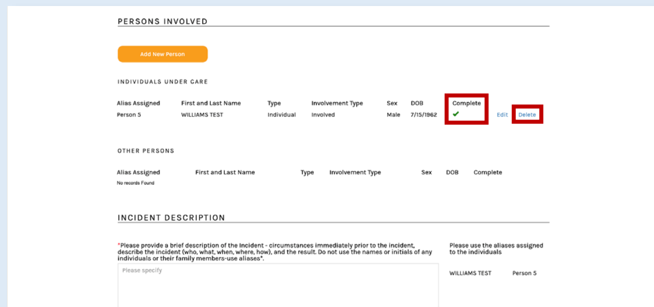
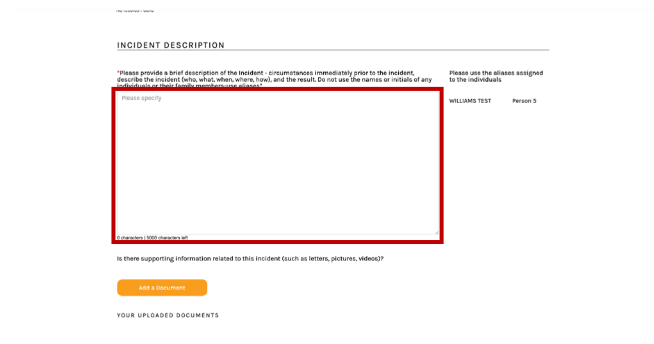
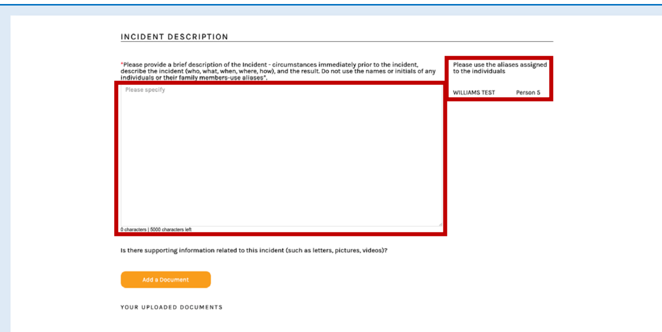
Step	Action	Visual
3d	Select the **drop-down arrow** to the right of the **select** text and choose the appropriate Individual from the list. Select the **Select** button.	
3e	The **Avatar Search** window will close, and the Individual's Avatar ID number will display in the **Avatar ID** field. The **Disability Type** and **CID** fields will auto populate based on the **Avatar ID**.	
4	The following fields will be auto-populated from the Avatar System based on the Individual's CID. Next, confirm the address where the Individual lived at the time of the incident is correct. **NOTE:** If the person involved is an Individual and his/her Avatar ID is entered, then the **First Name, Middle Name, Last Name, Date of Birth, Age at Time of Incident, Sex, Email Address, Address Line 1, Address Line 2, City/Town, Zip Code, County, Hearing Status,** and **Primary Language** fields will auto-fill.	

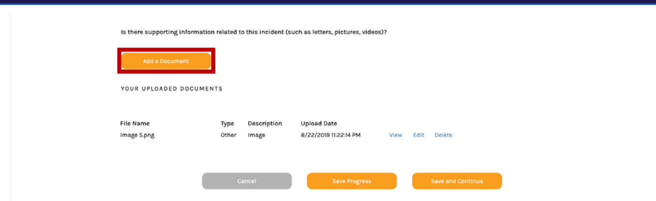
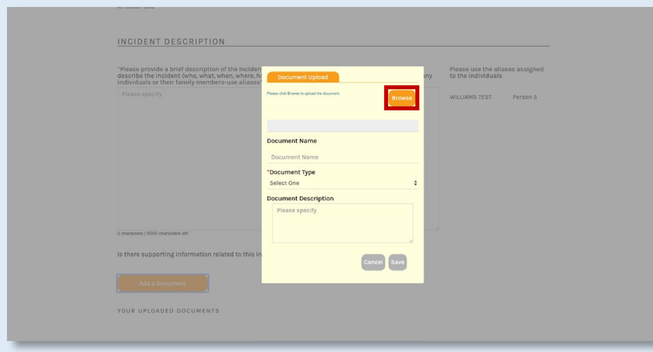
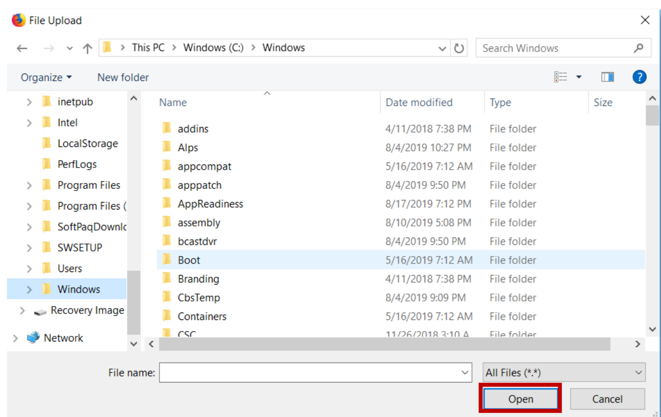
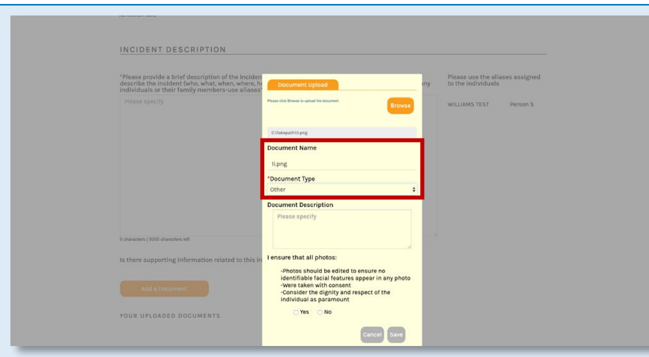
Step	Action	Visual
4a	If you hover over a text entry field, a tool tip will display. The tip usually indicates the field's character limit but sometimes will also contain examples of what needs to be entered. You will want to document as much information as you can about the person involved, even if the field is not required. **REMINDERS:** • Hovering over a text entry field will prompt a tool tip to display indicating the field's character limit or examples of what needs to be entered. • Document as much information as you can about the person involved, even if the field is not required.	
4b	In the **Was the person injured/deceased?** field, indicate if the individual was injured or deceased by selecting the **Yes** or **No** radio button. If the information is unknown, select the **Unknown** radio button. As a general rule, the **Was the person injured/deceased?** field is required for all persons involved and the involvement type.	
4c	Select the checkboxes that apply to the **Individual's Protocols/Plans**.	

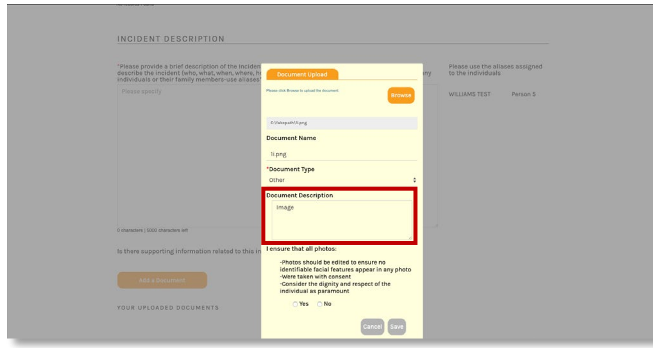
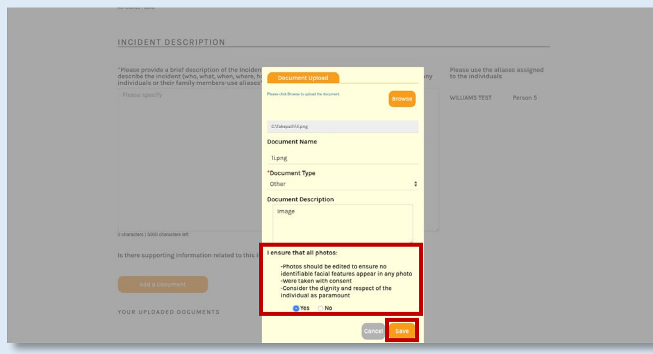
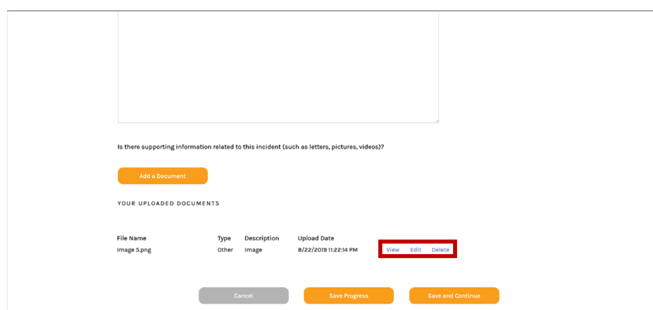
Step	Action	Visual
4d	Under the **Level of observation at time of incident** field, select the **drop-down arrow** to choose an option. For example, you can choose 1:1.	
4e	Next, you can indicate if the level of observation was changed as a result of the incident by selecting the **Yes** or **No** radio button.	
5	There are four buttons at the bottom of the page: The **Cancel** button, the **Save Progress** button, the **Save Person** button, and the **Save Person and Add Another** button. Selecting the **Cancel** button will return you to the previous page.	
5a	Selecting the **Save Progress** button will save the information you have entered, but the system will not check for required fields.	

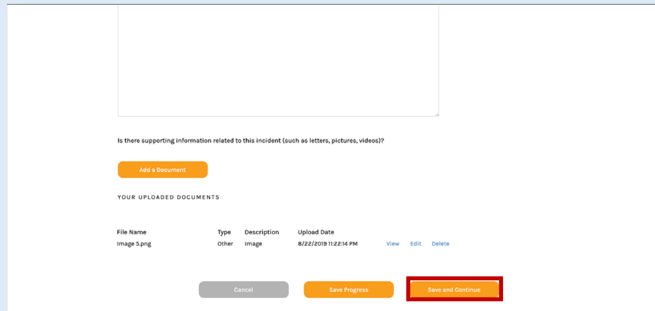
Step	Action	Visual
5b	Selecting the **Save Person** button will save the information you have entered and will return you to the previous page.	
5c	Just like the **Save Progress** button, the system will not check for required information when you select the **Save Person** button. When the Stage 3 page loads, you will see a red X in the **Complete** column if not all the required information has been entered. **NOTE:** The system will check for all required information. You will see a red X in the **Complete** column when the Stage 3 page loads.	
5d	If you select the **Save Person and Add Another** button, the system will check to ensure that all required information has been entered.	
5e	If all the required information has not been entered, you will see an error message or messages in red text at the top of the page.	

Step	Action	Visual
5f	If all the required information has been entered, the **New Person** page will refresh, and all the fields and options will be unfilled so that you can add another person.	
5g	**NOTE:** Remember to save your progress often, especially on a page like **New Person,** where there is a lot of information to enter.	
6	When you are finished documenting all the people involved in the incident and have returned to the Stage 3 page, you will see an entry for each person you added in the **PERSONS INVOLVED** section. For example, DBHDD Individuals will be listed first and grouped under the **INDIVIDUALS UNDER CARE** section. All other persons will be listed under the **OTHER PERSONS** section. The system will assign an alias for each person. If all the required information about a specific involved person has been entered, you will see a green checkmark in the **Complete** column.	
6a	If all the required information has not been entered, a red X will display in the **Complete** column. To enter the required or missing information, select the **Edit** link to open the **Edit Person** page.	

Step	Action	Visual
6b	After making the corrections and entering the required information, select the **Save Person** button.	
6c	The Stage 3 page will display, and now you should see a green checkmark in the **Complete** column. If you need to delete a person, select the **Delete** link.	
7	In the **INCIDENT DESCRIPTION** section, select the **Please specify** text and enter a description of the incident.	
7a	Notice that the same aliases that were assigned to each person listed in the **PERSONS INVOLVED** section are listed in the **Please use the aliases assigned to the Individuals** area where the incident description is entered. It is imperative that you use these aliases instead of the involved persons' names. For example, instead of entering "WILLIAMS TEST," you will enter "Person 5." **NOTE:** The same alias assigned to each person is listed in the **PERSONS INVOLVED** section. Use this alias in the description instead of the involved person's name.	

Step	Action	Visual
8	Select the **Add a Document** button if you need to upload supporting information to the Image system that is related to the incident, such as letters, pictures, or videos.	
8a	In the **Document Upload** popup window, select the **Browse** button.	
8b	In the **Open dialog** box, navigate to the location of the file that you want to upload. Select the file and then select the **Open** button.	
8c	The **Open dialog** box will close, and the name of the file you just chose will display in the **Document Name** field. Select the **drop-down arrow** in the **Document Type** field and choose the type of document from the list.	

Step	Action	Visual
8d	In the **Document Description** field, enter a brief description of the file's contents.	
8e	If the document uploaded is a photo, select the **Yes** radio button within the **I ensure that all photos** section. In this document upload example, uploading photo files will require you to ensure that all photos comply with HIPAA and PHI standards. Select the **Save** button.	
8f	The file will now display under the **YOUR UPLOADED DOCUMENTS** heading. There are three links that allow you to view, edit, or delete the file. Select the **View** link to view the file. When selected, a **Save As** dialog box will open and you can navigate to where you want to save the file. Select the **Edit** link to edit either the Document Type or the Document Description. Select the **Delete** link to delete the uploaded file. You will see a message asking you to confirm the deletion. Select **Yes** to delete the file from Image. If you have multiple documents to upload, you will repeat the upload process for each file. **NOTE:** Repeat the upload process if you have multiple documents to upload.	

<table>
<tr><th>Step</th><th>Action</th><th>Visual</th></tr>
<tr><td>8g</td><td>When you have entered all the information for Stage 3, select the Save and Continue button to advance to Stage 4.</td><td>
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