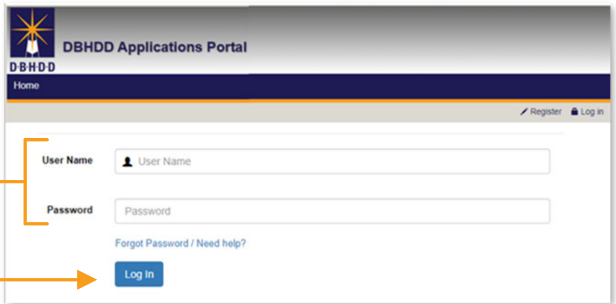
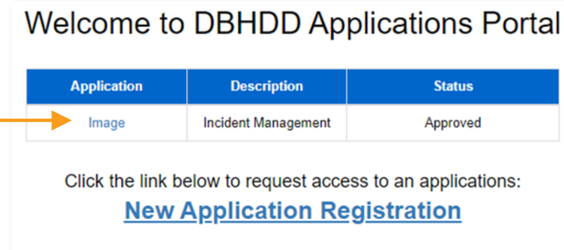
Creating Incident Reports (IRs) in Image

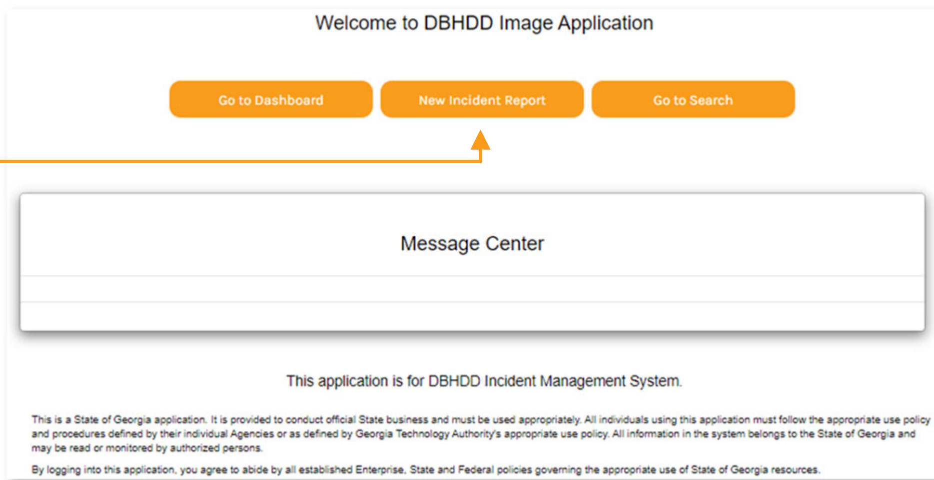
1. Visit the DBHDD Applications Portal, enter your User Name and Password, and select "Login"



2. Select "Image" to access the system



3. Select "New Incident Report" from the home page



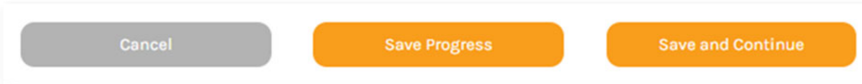
The "New Incident Report" button is also available on your Dashboard

4. You'll be taken to Stage 1 of the IR. Each IR has 5 stages that must be completed before it can be submitted.

- The stage on which you're currently working will always be highlighted in orange. Previously completed stages will appear in solid gray.
- Required information on each stage will be noted with a red asterisk (*)
- Throughout the IR process, anytime you complete an action within the workflow (save, assign, etc.), you'll receive an onscreen confirmation

Creating Incident Reports (IRs) in Image *(cont)*

5 The bottom menu allows you to “Cancel,” “Save Progress,” or “Save and Continue”



Use “Save Progress” often to ensure you do not lose entered information

Cancel deletes a pending, previously unsaved IR in Stage 1 or removes information you’ve added in later stages

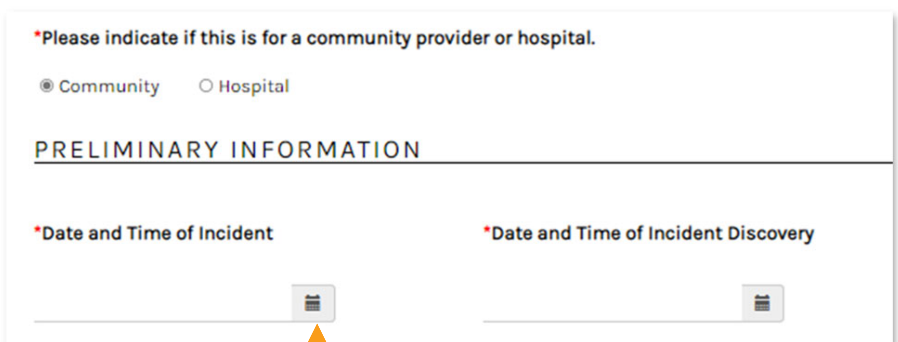
Save Progress allows you to enter only partial information, creates an IR number, and sets the IR status as “Draft”

Save and Continue validates all required fields on that IR stage, provides an error message if a required field is missing, saves your information, moves you to the next stage of the IR, and sets the IR status as “Draft”

6 **Stage 1 – Preliminary Information, Reporting Party, Responsible Party**

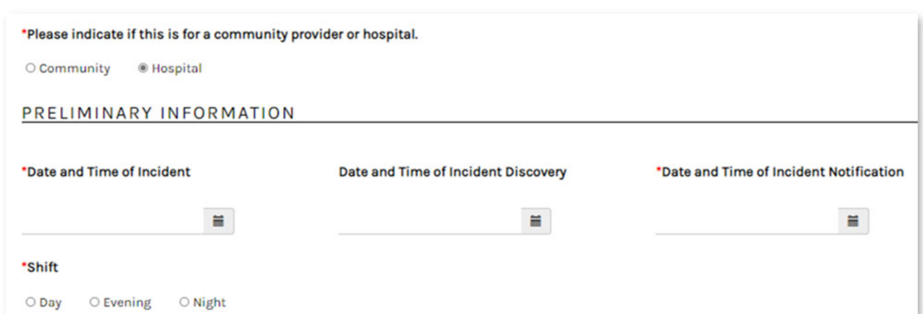
Stage 1.1 – Preliminary Information covers the location and time of the incident. The type of location you select (community or hospital) determines the subsequent information you’re asked to provide.

Community



Wherever you see a calendar icon, you can use it to quickly select a date/time

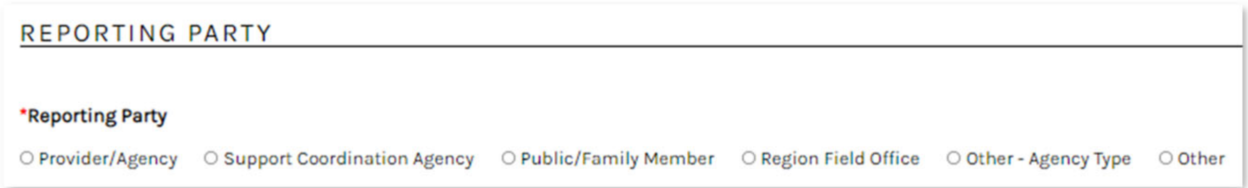
Hospital



Throughout the IR stages, information you’re asked to provide will be determined by your selections (provider, agency, hospital, staff, individual, etc.). While this guide will reflect the stages and sections of an IR, it will **not** show required information for each type of selection within a specific stage or section. Remember that required fields are always marked with a red asterisk (*).

6 Stage 1 – Preliminary Information, Reporting Party, Responsible Party *(cont)*

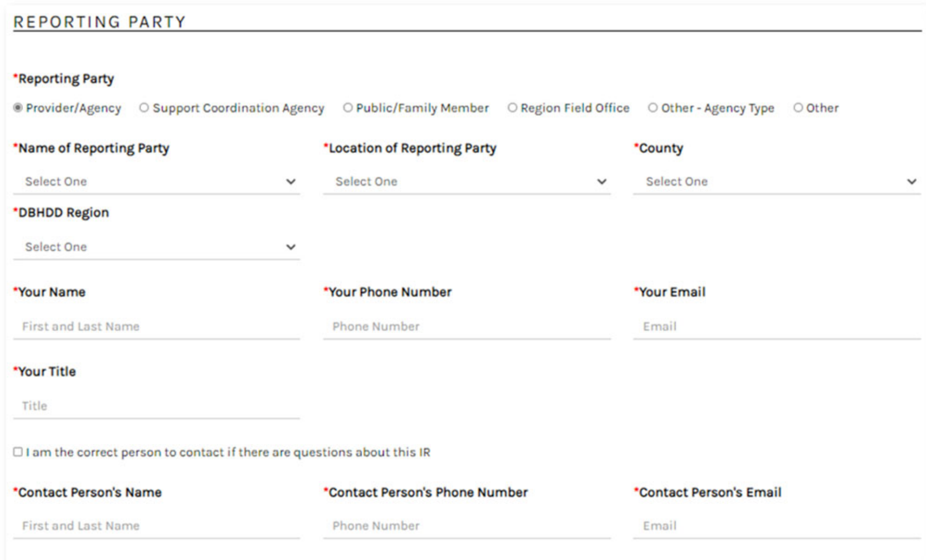
Stage 1.2 – Reporting Party is the entity that is reporting the incident (select only 1)


REPORTING PARTY

*Reporting Party

○ Provider/Agency ○ Support Coordination Agency ○ Public/Family Member ○ Region Field Office ○ Other - Agency Type ○ Other

Sample information when Reporting Party is Provider/Agency


REPORTING PARTY

*Reporting Party

◉ Provider/Agency ○ Support Coordination Agency ○ Public/Family Member ○ Region Field Office ○ Other - Agency Type ○ Other

*Name of Reporting Party: Select One
*Location of Reporting Party: Select One
*County: Select One

*DBHDD Region: Select One

*Your Name: First and Last Name
*Your Phone Number: Phone Number
*Your Email: Email

*Your Title: Title

☐ I am the correct person to contact if there are questions about this IR

*Contact Person's Name: First and Last Name
*Contact Person's Phone Number: Phone Number
*Contact Person's Email: Email

Stage 1.3 – Responsible Party is the is the party that was responsible for the care of the individual at the time of the incident (select only 1)

Selecting "Responsible Party is the same as the Reporting Party" will automatically fill in required information provided in Stage 1.2

Selecting a different responsible party will require completing additional information


RESPONSIBLE PARTY

The Responsible Party is the party that was responsible for the care of the individual at the time of the incident.

Please check all that apply.

☐ Responsible Party is the same as the Reporting Party.

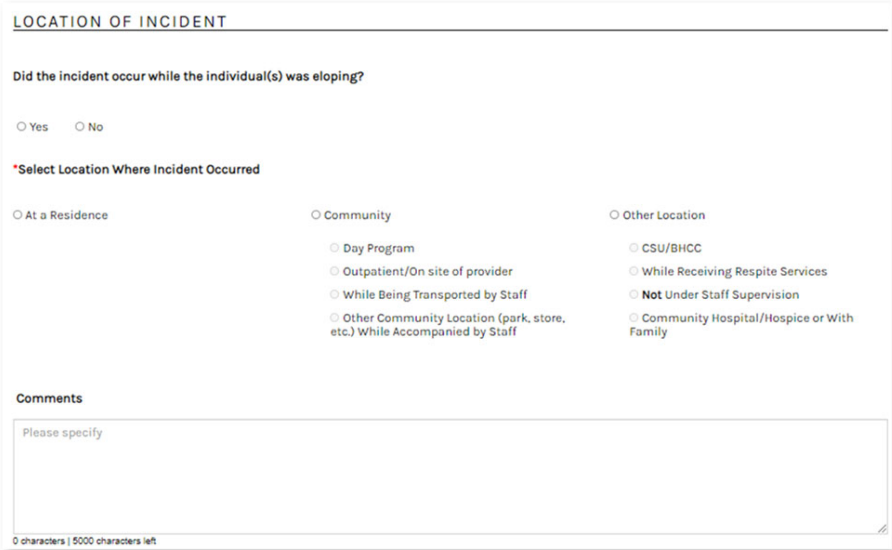
Please select a responsible party type.

○ Provider/Agency ○ Support Coordination Agency ○ DBHDD

Creating Incident Reports (IRs) in Image *(cont)*

7 Stage 2 – Location of Incident, Notifications

Stage 2.1 – Location of Incident notes where the incident occurred


LOCATION OF INCIDENT

Did the incident occur while the individual(s) was eloping?

○ Yes ○ No

*Select Location Where Incident Occurred

○ At a Residence

○ Community
- ○ Day Program
- ○ Outpatient/On site of provider
- ○ While Being Transported by Staff
- ○ Other Community Location (park, store, etc.) While Accompanied by Staff

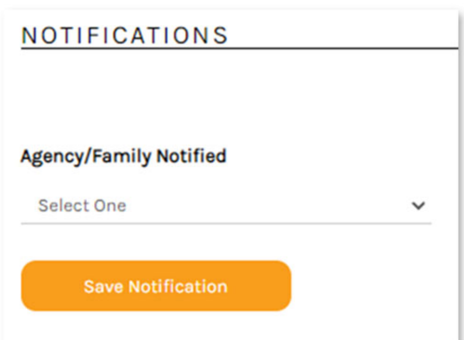
○ Other Location
- ○ CSU/BHCC
- ○ While Receiving Respite Services
- ○ **Not** Under Staff Supervision
- ○ Community Hospital/Hospice or With Family

Comments

Please specify

0 characters | 5000 characters left

Stage 2.2 – Notifications notes if any agency, authority, family, or guardian was notified of the incident


NOTIFICATIONS

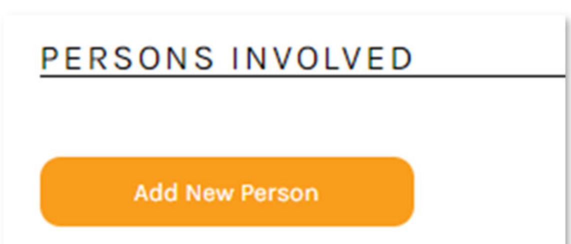
Agency/Family Notified

Select One

Save Notification

8 Stage 3 – Persons Involved, Incident Description

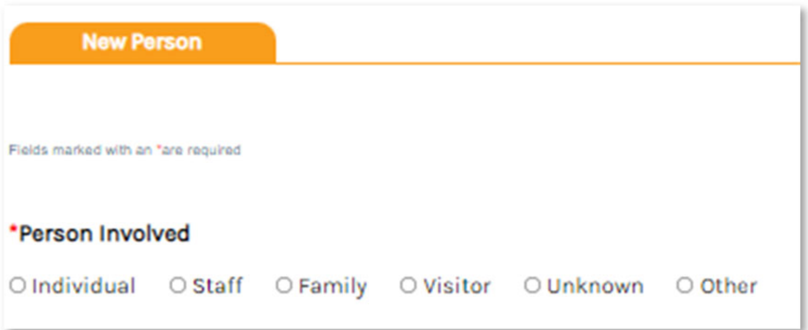
Stage 3.1 – Persons Involved allows you to note any staff, individuals, witnesses, or other persons involved in the incident. Select "Add New Person" to create that person's record on the IR.


PERSONS INVOLVED

Add New Person

8 Stage 3 – Persons Involved, Incident Description *(cont)*

Stage 3.2 – New Person allows you to select the type of person involved and complete the required information related to that selection type

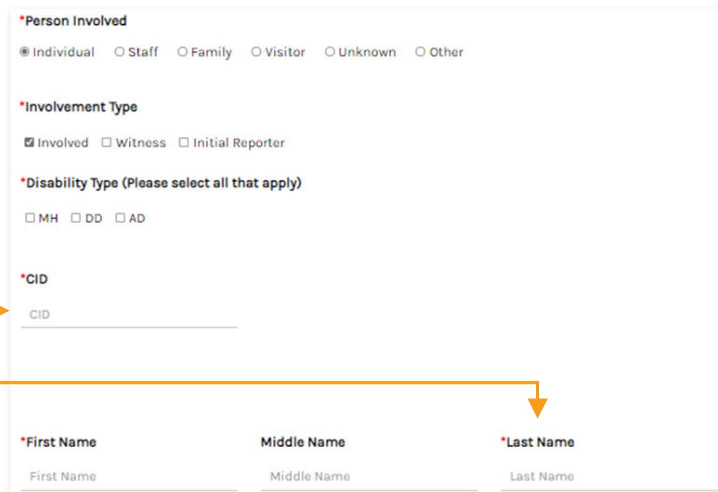


When adding an "Individual" to an incident, additional information is required and is determined by whether the incident occurred at a Provider or a Hospital

<u>Provider</u>

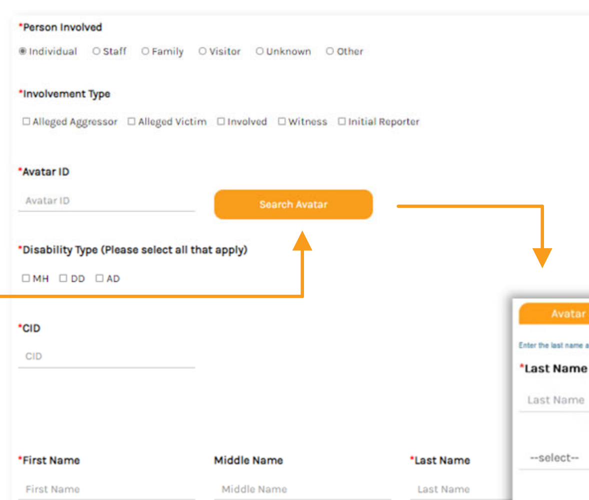
The 9-digit CID# and the Last Name must match what is on file. Once the CID is entered, the system will automatically populate the Individual's information.

If the Individual does not yet have an assigned CID# or you do not have access to it, you can use 111111111 and manually enter the required fields.
<u>NOTE</u> that using this generic CID will cause data integrity issues. You can update the CID field later to the assigned CID.

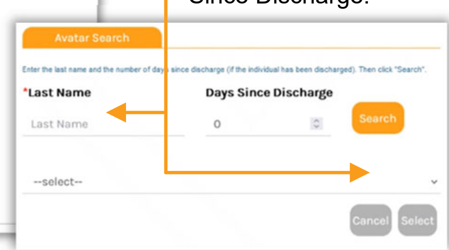


<u>Hospital</u>

You can use the Avatar search for an Individual at a hospital. Once the Avatar ID is entered, the Individual's information will automatically populate.



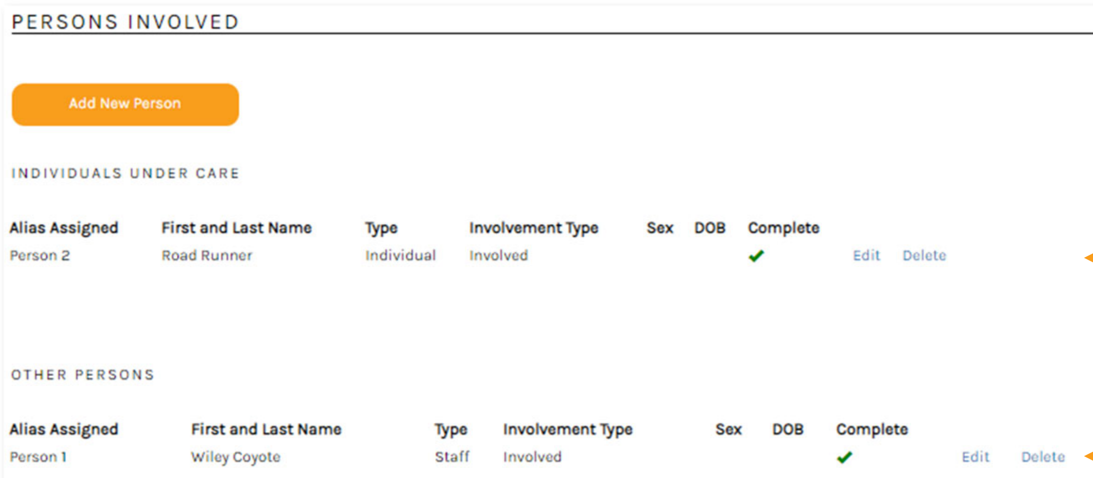
Avatar lets you "Search" by Last Name and "Select" the Individual from a dropdown list. If the Individual has already been discharged, be sure to enter "Days Since Discharge."



8 Stage 3 – Persons Involved, Incident Description *(cont)*

Stage 3.3 – Save Person Select “Save Person” or, if you have additional persons to add, select “Save Person and Add Another”

Stage 3.4 – Persons Involved now reflects anyone who was added to the IR

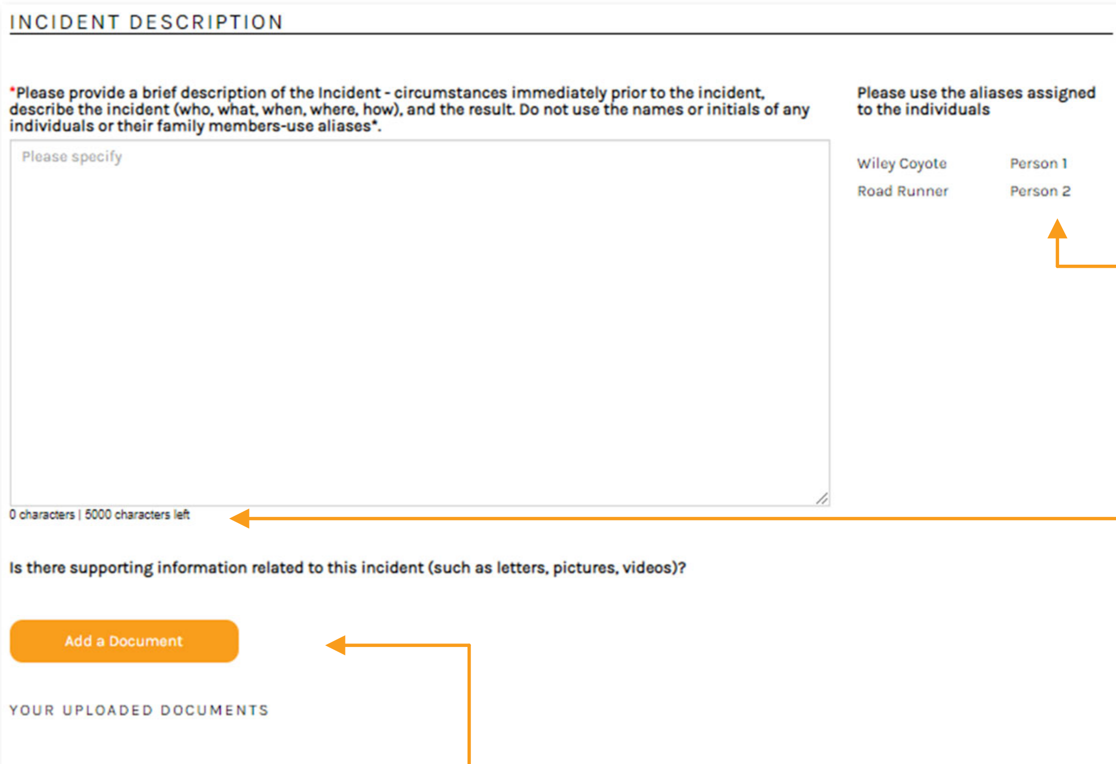


The system has now assigned an alias for each person involved

You can edit or delete persons after they’ve been added to the IR.

8 Stage 3 – Persons Involved, Incident Description *(cont)*

Stage 3.5 – Incident Description allows you to provide a detailed description of the incident


INCIDENT DESCRIPTION

Please provide a brief description of the Incident - circumstances immediately prior to the incident, describe the incident (who, what, when, where, how), and the result. Do not use the names or initials of any individuals or their family members-use aliases.

Please specify

0 characters | 5000 characters left

Please use the aliases assigned to the individuals

Wiley Coyote Person 1

Road Runner Person 2

Is there supporting information related to this incident (such as letters, pictures, videos)?

Add a Document

YOUR UPLOADED DOCUMENTS

When writing your description, be sure to use the assigned aliases for individuals receiving services or their family members

Note there is a character limit on the description field

Use “Add a Document” to upload any supporting documents along with the description. Supporting documents will appear in the “Your Uploaded Documents” section.

9 Stage 4 – Incident Type, Safety Plan

Stage 4.1 – Incident Type allows you to assign specific incident type(s) for each person who will be cited as a result of the IR

INCIDENT TYPE

Please select all that apply.

☐ An individual died

***Was there an allegation of Staff Abuse, Neglect, or Exploitation?**

○ Yes ○ No ○ Unknown

***Were any of the individuals admitted to the hospital, CSU, or BHCC?**

○ Yes ○ No ○ Unknown

Community policy

All Incident Types

☐ 000 - Incident Not Reportable	☐ 230 - Inappropriate Intervention	☐ 440 - Secl/Restraint - Injury 3+
☐ 100 - Death - Expected	☐ 300 - Falls - Injury 3+	☐ 441 - Secl/Restraint - CSU
☐ 101 - Death - Unexpected	☐ 310 - Choking	☐ 450 - Elopement
☐ 102 - Suicide	☐ 320 - Med Error	☐ 500 - Law Enforcement
☐ 103 - Death - Other	☐ 330 - Hospital - Medical	☐ 501 - Criminal Act
☐ 104 - Homicide	☐ 331 - Hospital - Psych	☐ 600 - Rights Violation
☐ 200 - Abuse - Physical	☐ 340 - Accident - Injury 3+	☐ 900 - Media Alert
☐ 201 - Abuse - Sexual	☐ 400 - Sexual Assault (Ind)	☐ 910 - Non-Compliance
☐ 202 - Abuse - Psychological	☐ 411 - Alleged Financial Exploitation - Ind/Ind	☐ 920 - Exposure-Coronavirus
☐ 203 - Abuse - Verbal	☐ 420 - Aggressive Physical Act Ind/Ind with an Injury Severity Rating of 3+	☐ 921 - Positive-Coronavirus
☐ 210 - Neglect	☐ 424 - Aggressive act resulting in death - Ind/Non-Ind	☐ 922 - Death-Coronavirus
☐ 220 - Exploit (St/In)	☐ 425 - Aggression (In/Other) – Injury 3+	☐ 923 - Recovered-Coronavirus
☐ 221 - Financial Exploit (St/In)	☐ 430 - Suicide Attempt	

Check all Incident Types that apply

Stage 4.2 – Select Staff or Individual Per Incident Type allows you to assign specific incident types to specific persons cited in the IR

SELECT STAFF OR INDIVIDUAL PER INCIDENT TYPE

Person	Incident Type
Chester Cat |	☑ 203 - Abuse - Verbal

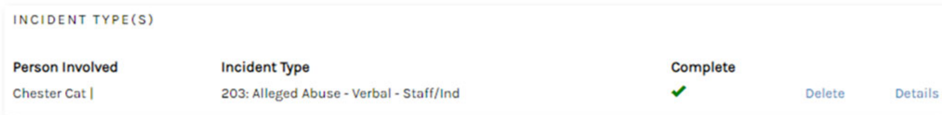
Save New Entry

Be sure the appropriate Incident Type(s) is/are checked for each person and click “Save New Entry”

Creating Incident Reports (IRs) in Image *(cont)*

9 Stage 4 – Incident Type, Safety Plan *(cont)*

Stage 4.3 – Incident Type(s) now shows all individuals selected and the associated incident type



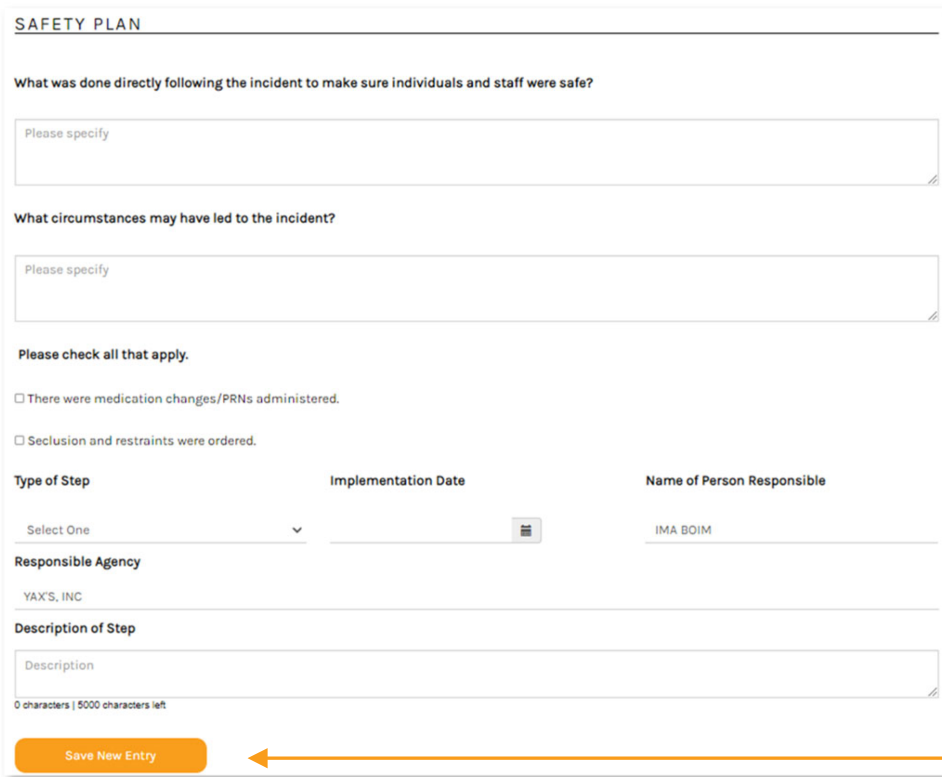
INCIDENT TYPE(S)

Person Involved	Incident Type	Complete		
Chester Cat |	203: Alleged Abuse - Verbal - Staff/Ind	✔	Delete	Details

You can use the "Delete" or "Details" links to view or remove

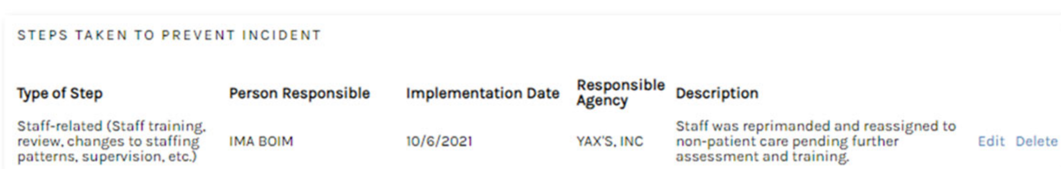
If the "Complete" column shows a red **X**, you'll need to select "Details" and click the "Save and Close" button

Stage 4.4 – Safety Plan outlines the steps that were, or are being, taken to ensure the safety of any individuals



Once the Safety Plan is completed, you must select "Save New Entry"

Stage 4.5 – Steps Taken to Prevent Incident are now visible



STEPS TAKEN TO PREVENT INCIDENT

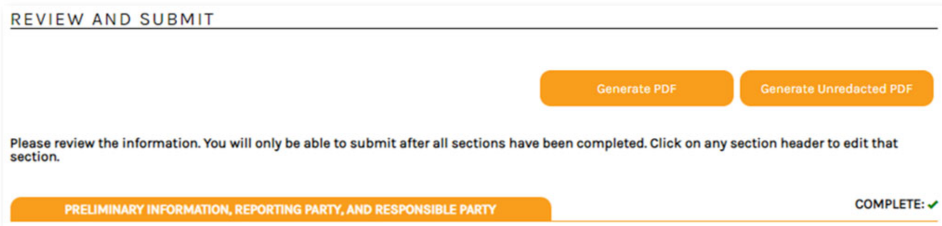
Type of Step	Person Responsible	Implementation Date	Responsible Agency	Description		
Staff-related (Staff training, review, changes to staffing patterns, supervision, etc.)	IMA BOIM	10/6/2021	YAX'S, INC	Staff was reprimanded and reassigned to non-patient care pending further assessment and training.	Edit	Delete

Use the "Edit" or "Delete" links to update this information

Creating Incident Reports (IRs) in Image *(cont)*

10 Stage 5 – Review and Submit

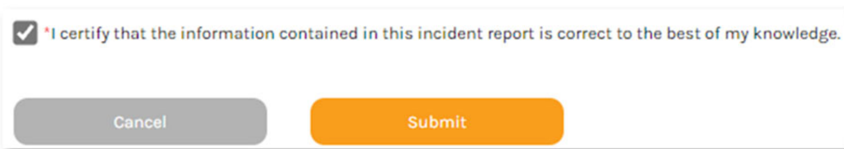
Stage 5.1 – Review allows you to verify that all stages of the IR have been completed



You can generate draft reports for the incident

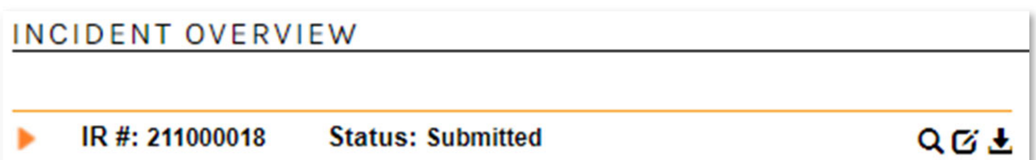
There will be a section header for each stage of the IR and it should show as “Complete” with a green checkmark

Stage 5.2 – Certify & Submit allows you to formally submit the IR for review



Be sure to check the certification and then click “Submit”

If you search for this IR or open it from your dashboard, the Incident Overview page will show a status of “Submitted”



“Submitted” is the initial status of a newly submitted IR. This status will change as the IR progresses through the review and, if necessary, investigation process.