

# Accident and Incident Reporting

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## Set-up

The set-up for this module is extremely important as it dictates the various Categories and the Items under each Category which will be available to users when entering data. This flexibility allows your facility to define twenty-five (25) data Categories and ninety-nine (99) data Items under each category. When first installed, the Accident/Incident module may contain a default Categories and Items set-up similar to the following:

Categories	Items
LOCATION	Bedroom, Bathroom, Hallway, Dining Room, Parlor/lounge, Elevator, Therapy suite, Chapel, Beauty Shop, Activities, Kitchen, Campus grounds, Off Campus, Other, Not known
OBSERVATION	Witnessed by staff, Witnessed by other, Unobserved, Reported by resident, During staff assistance
ACTIVITY	Transfer to bed, Rolling out of bed, Transfer toilet, Falling off toilet, Transfer chair, Slip off chair, Washing, Dressing, Making bed, Ambulating, Wheeling chair, Eating, Bus, Stairs, Pt. Aggressor, Pt. Victimized, Other
MED/TREAT	N/A, Related to meds, Related to treatments
ASSISTIVE DEVICEN/A,	Used properly, Not used properly
WHEEL CHAIR	N/A, Locked, Unlocked
ENVIRONMENT	Wet, Dry, Rug, Curb, Other, N/A
OBSTRUCTION	Door, Wheelchair, Walker, Cane, Cart, Resident/staff, Other, N/A
FOOTWEAR	Footwear on, Footwear off, Improper footwear, N/A
RESTRAINT ORDER	Yes, No, N/A
SIDE RAILS	Side rails up, Side rails down, Side rails involved, N/A
RESTRAINTS	Restraints on, Restraints off, Restraints loose, N/A
SYMPTOMS	Dizzy, Faint, Lost balance, Nausea/Vomiting, Diarrhea, Other, None
INJURY SITE	None, Head, Body, Limb, Hand, Joint, Multiple
INJURY TYPE	None, Hematoma/Abrasion, Laceration, Skin tear, Several skin injuries, Foreign body, Fracture, Multiple injuries, Other
TREATMENT	Nursing Rx, Physician Rx, No Rx needed
DISPOSITION	X-ray, Hospital, Other, N/A

The above data tracking categories may be changed, deleted, or increased so that you meet your facility's needs. For example, you may wish to have a category called ACCIDENT SITE rather than LOCATION. Or, you may wish to add another category for tracking whether eyewear was being used, or to delete a category supplied to you with the system. In a like manner you may add, edit, or delete the items which appear as choices for the categories. For example, under LOCATION your facility may not have a dedicated chapel but it may have a whirlpool room that is separate from the resident's bathroom. You could delete chapel and add whirlpool.

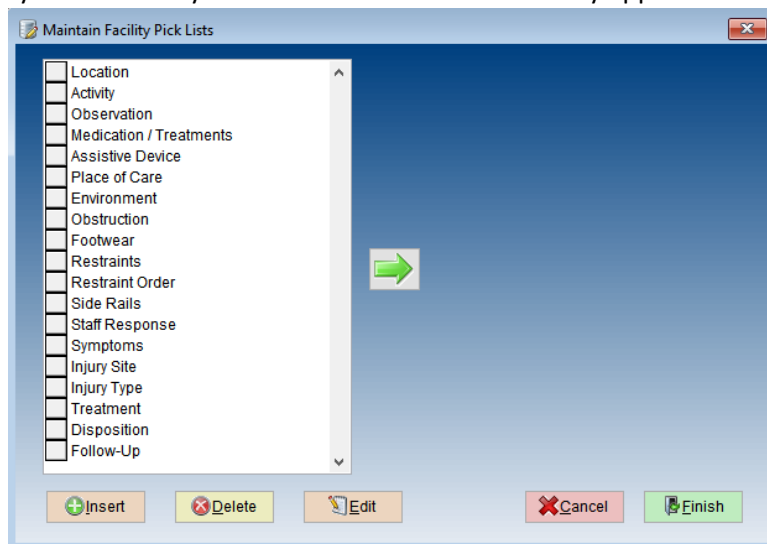
**Please Note:** It is important to set-up your new Accident/Incident Reporting Module so that it will provide you with information relevant to your facility prior to utilizing the system. It is also important to your clinicians to utilize terminology which is familiar to them.

## Set Up Categories and Items

### Utilities – Maintain Lists

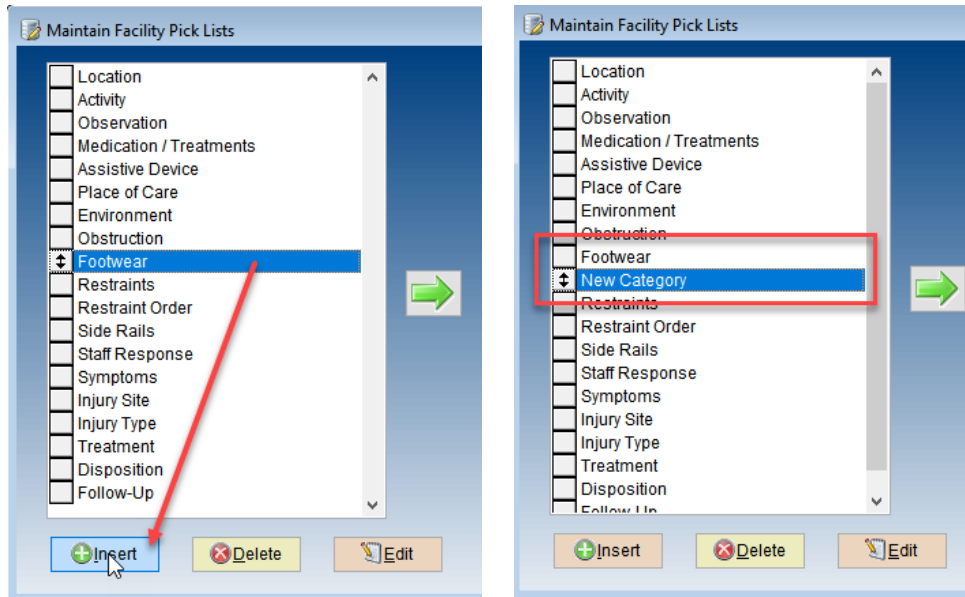
#### CATEGORIES

When you select the menu option, the window will open with a list of all current categories on the left. The categories will display in your data entry screen in the order in which they appear here.



#### *Add a Category*

To add a new category, first decide where in the list you wish the new category to display. Highlight the category just *above* where you want to insert the new one. For example, we want to add a new category to track whether the resident was wearing their eyewear or using their contacts. We decide we want the new category to be *under* the existing category for FOOTWEAR. First, we will highlight FOOTWEAR and then press the **INSERT** button. You will notice your new category displays in the list just under FOOTWEAR and it has the name NEW CATEGORY.



You will want to give your new category a better name so double click it. A new window will display where you may type in the new name of your category. Press **OK** to display it in the list.

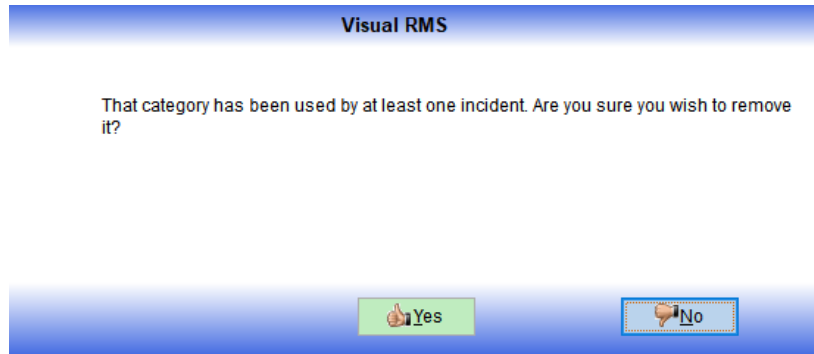


#### *Edit a Category*

You may wish to change the name of a category. Remember that this will change what displays on all of your reports so be very careful. It is best to change names to clarify, not to change the meaning of the title. For example, you would not want to change the name of FOOTWEAR to say ALARMS. It would change the meaning of all prior data collections. You may, however, want to change LOCATION to say EVENT SITE or FACILITY SITE so that it matches terminology that you use in your facility. To do this, highlight the category you wish to change and then press the **EDIT** button. An Edit Category Title window (like displayed above) will appear. Type in the new name of the category and then press **OK** to save it to the list.

#### *Delete a Category*

If there is a category that you wish to remove from the list, highlight it and then press the **DELETE** button. The system will look to see if that category has ever been used in prior data collections. If it has, you will be warned. Be very careful. If you elect to delete anyway, all of the prior data will be erased permanently. Rather than destroying your data, it may be best to simply move the category to the bottom of the list.



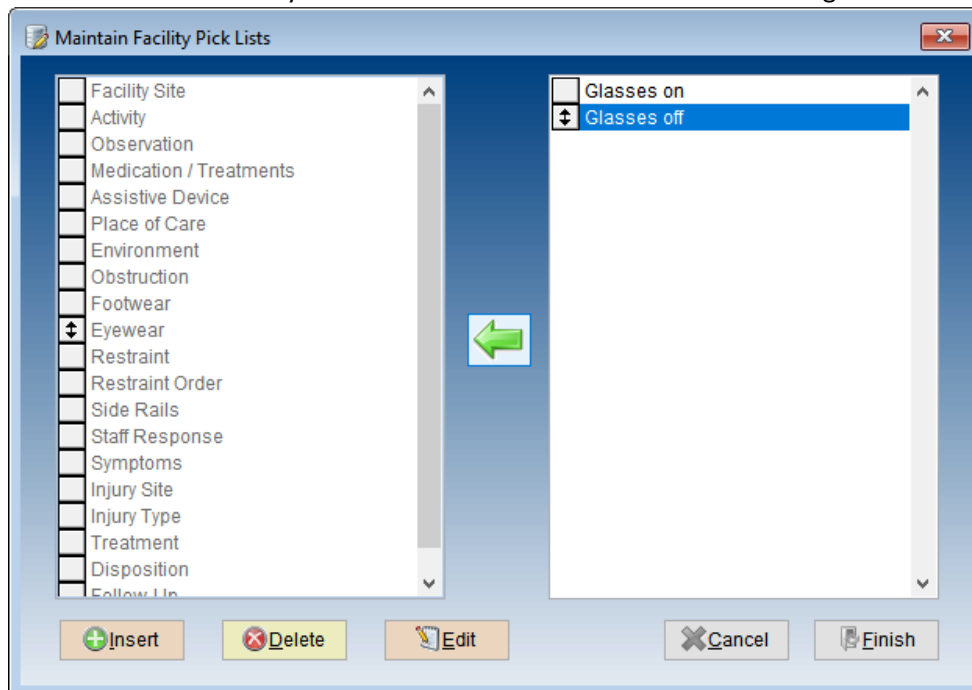
### *Change the Order of a Category*

As you edit titles and add categories, you may find that a different order would be helpful. You can easily change the display order. Click on the box to the left of the category you wish to move. You will notice that a two headed arrow displays. With your mouse clicked on that arrow, drag it to the new position and then release the mouse.

### CATEGORY ITEMS

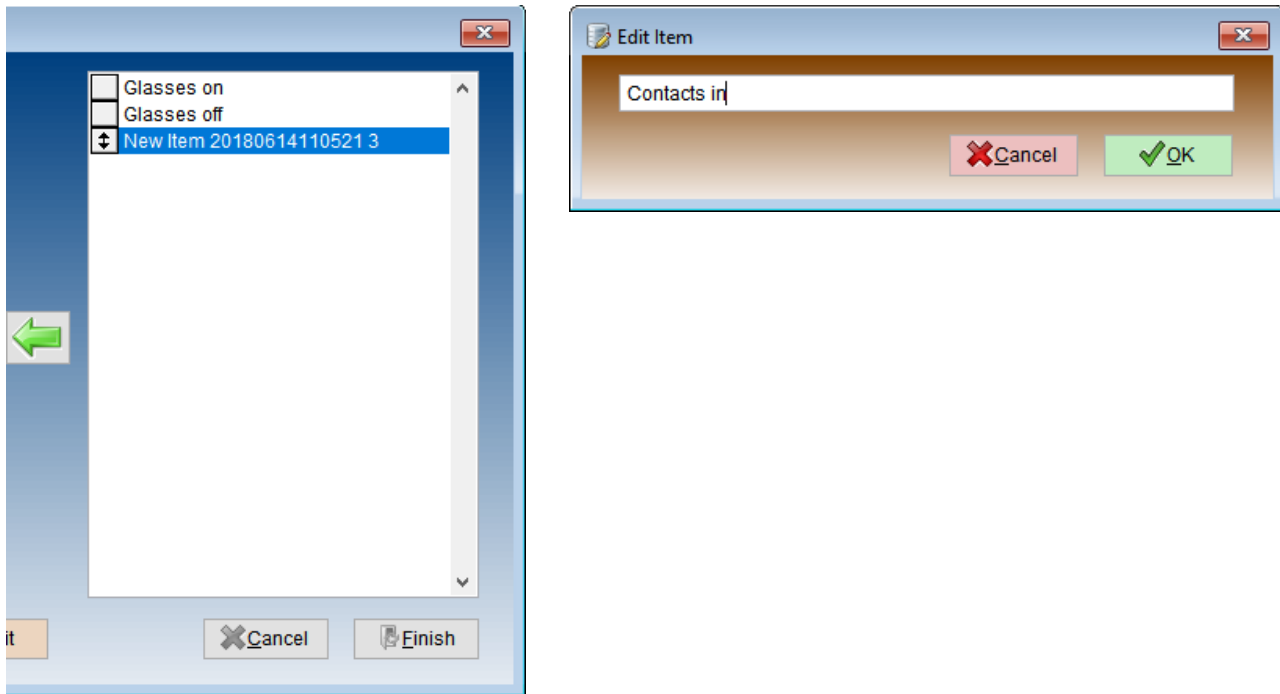
Category Items are those things that define your category. For example, under the category LOCATION or FACILITY SITE you may want a list of all places within your facility – bedroom, bathroom, shower room, dining room, gathering room, activities room, hallway, therapy room, etc.

From the list of categories, highlight the category that you wish to review and then click the **GREEN RIGHT FACING ARROW**. The list of all current items will appear to the right of the list of categories. The green arrow will also switch directions. This allows you to move between the items and the categories.



### Add an Item

To add a new item to the list, select the existing item that you want your new text to appear below. In our example above, we want to add a new item to the bottom of the list, so we will highlight GLASSES OFF. Then press the **INSERT** button. A line with the text NEW ITEM will appear in the list. You will want to give your new item a better name so double click it. A new window will display where you may type in the new name of your category. Press **OK** to display it in the list.



Once you have entered all of your new items, press the **GREEN LEFT FACING ARROW** to return to the category list. Press **FINISH** to return to the menu.

**Tip:** It is best to create an item for NOT APPLICABLE and another for UNKNOWN so that you can record data for each of your categories. You want to discourage people from creating event reports that have blanks. Did they forget to complete the report, was the information not applicable, or was it unknown? Don't make people reading the report later guess at the circumstances.

### Edit an Item

You may wish to change the text/label on an item. It is best to change names to clarify, not to change the meaning of the title. To *clarify* a title, highlight the item you wish to change and then press the **EDIT** button. An Edit Item window (like displayed above) will appear. Type in the new name of the item and then press **OK** to save it to the list.

### Delete an Item

If there is an item that you wish to remove from the list, highlight it and then press the **DELETE** button. Be very careful – deleting items that have been assigned to prior events can impact how items appear in the graphical reports. If you have a question, please give us a call.



Name: AAA B, Accident/Incident Reporting SS: [REDACTED]

Date of Incident: // 1 Time of Incident: : 2

Date of Report: // 3 Unit: 01 4

Witness or Person Finding: 5

Home: - - Work: - -

Accident or Incident:  6

Accident or Incident Due to Fall: No 7

Was an employee/resident exposed to potentially infectious blood or body fluids? No 8

Add Note

1. Enter the **DATE** the incident occurred.
2. Enter the **TIME** the incident occurred. Time is a twelve-hour time with AM/PM
3. Enter the **DATE** that the incident was reported. If on Monday morning a resident reports something that happened on Saturday, enter Saturday's date as the INCIDENT and Monday's date as the REPORT.
4. The resident's **UNIT** today will default. If, however, that is not the unit at the time of the incident, you may correct it by using the drop-down list to select.
5. If there was a **WITNESS** to the incident or if someone discovered the resident on the floor, for example, record the information (name, address, phone numbers) you may need to make further contact or secure a statement.
6. Indicate whether this was an accident (**A**) or an incident (**I**).
7. Was the event a result of a **FALL**? Indicate YES or NO by using the drop-down list to select.
8. If there was **EXPOSURE TO POTENTIALLY INFECTIOUS BLOOD OR BODILY FLUIDS**, indicate YES by using the drop-down list to select.

In the lower right-hand corner there is a shortcut button to the Progress Notes module. If you use this button, any default note categories will automatically be assigned and the Incident/date information will become a part of the note for easy identification. While in the note, additional categories can be assigned.

When this screen is complete, press NEXT PAGE from the menu in the upper left corner. The first of the details pages will appear. This is now where you review the categories and associated items that you have created.

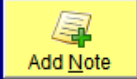
You will use the TAB KEY to move from category to category. To move back up the list use SHIFT TAB.



Name: AAA B, SS:

<b>FACILITY SITE</b>		<input type="checkbox"/> Facility Site <input checked="" type="checkbox"/> Bedroom <input type="checkbox"/> Chapel <input type="checkbox"/> Hallway <input type="checkbox"/> kitchen <input type="checkbox"/> Lounge <input type="checkbox"/> Dining room <input type="checkbox"/> Nurses station <input type="checkbox"/> Other <input type="checkbox"/> Elevator <input type="checkbox"/> PT <input type="checkbox"/> OT <input type="checkbox"/> Activities <input type="checkbox"/> Campus grounds <input type="checkbox"/> Not Known
<b>ACTIVITY</b>		
<b>OBSERVATION</b>		
<b>MEDICATION / TREATMENTS</b>		
<b>ASSISTIVE DEVICE</b>		
<b>PLACE OF CARE</b>		
<b>ENVIRONMENT</b>		

Pressing Tab and Shift+Tab will move you through the prompts

 Add Note

Begin with the first category, FACILITY SITE in our example. All of the items associated with this category will display on the right. Use the mouse and click on box to the left of each item that applies to this event. An X will appear in the box to the left of the item name. Once all of the items have been picked, press TAB to move to the second. As you do that, you will notice that the items you selected for the first category will now be listed in the large white text box to the right of the category name.

With the second category now selected, the list of items on the right will change to reflect those associated with the new category. Again, click on those that pertain to this category. You will see an X appear next to those you select. When finished, press TAB to move your choices into the white text box next to the category and to move to the next category. Repeat until you have processed all of the categories. If you have more than seven categories, the system will automatically move to the next set of seven. After the last category you will be returned to the RESIDENT RECORD SCREEN. If you are done with this resident press FINISH.

#### EDIT AN EXISTING RESIDENT ACCIDENT/INCIDENT RECORD

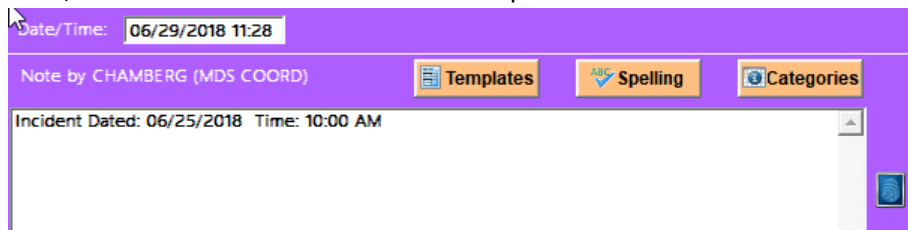
While on the RESIDENT RECORD SCREEN for your selected resident, highlight the record you wish to change and then press the **EDIT** button. The same screens will appear as did when inserting a record. The current information from that record will display. Use the NEXT PAGE on the menu to cycle through the pages. Use the TAB key to move from category to category. To change items displayed for a category, first TAB to that category. In the item list, mouse click on new items to add them to the list. Or, to remove items, mouse click on the existing X to remove it. Click the FINISHED button when all edits are done.

## DELETE AN EXISTING RESIDENT ACCIDENT/INCIDENT RECORD

To delete an erroneous record for a resident, first select the resident in question. On the RESIDENT RECORD SCREEN, click on the incorrect record to highlight it blue. Click on the DELETE button. A message will appear asking, "Are you sure you wish to delete this record?" Answering YES will permanently remove this record so be very sure you have the correct record.

## ADD NOTES TO ACCIDENT/INCIDENT RECORD

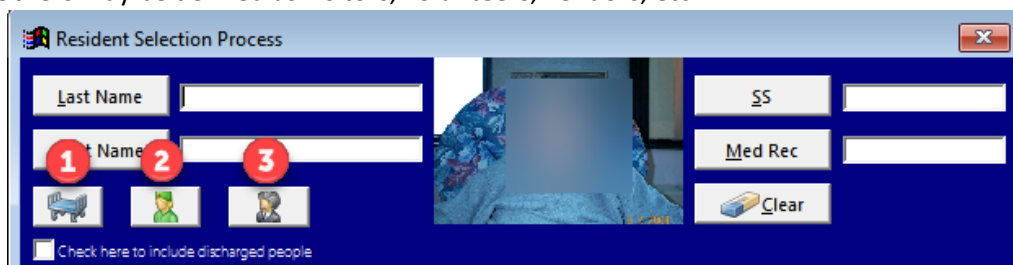
You will notice on the RESIDENT RECORD SCREEN and then each of the data entry screens there is an **ADD NOTE** button at the bottom of the window. This button will act as a shortcut to take you to the Progress Notes module. If you have highlighted an event on the RESIDENT RECORD SCREEN or are working in an event when you push the button, you will be asked if you want identifying information to carry forward. If you answer YES and then create a note, the first line will show like this example:



If you wish an automatic category to be placed on all notes created from this shortcut, you may place a default category on the ADD NOTE button. To do so, you must have a rights level of 5 for the Accident/Incident module. Right click the button and then check off all of the categories you wish to use. Remember, these can be fine-tuned when you create the actual note. To review these notes, you may do so through Progress Notes or by using any of the ADD NOTE buttons throughout the system.

## Accident/Incident Data for Staff/Other

The resident selection screen also offers you the option of selecting from a list of employees or a list of "other" individuals. Others may be defined as visitors, volunteers, vendors, etc.

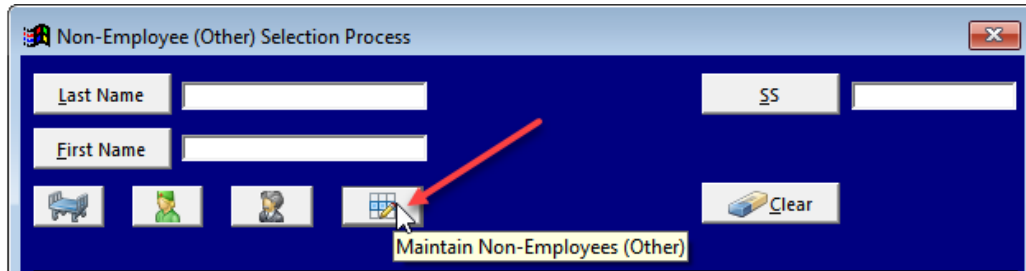


1. When you press the button with the icon of a bed, you will have a list of all RESIDENTS. Search fields are name, social security number, and medical record number.
2. When you press the button with the green icon of a person, you will have a list of all defined EMPLOYEES. Search fields are name, social security number, and position.
3. When you press the button with the gray icon of a person, you will have a list of all defined OTHERS. Search fields are name or social security number.

Once you select which list you want to see, you may use any of the associated search fields to locate the individual.

### STAFF/OTHER SET-UP

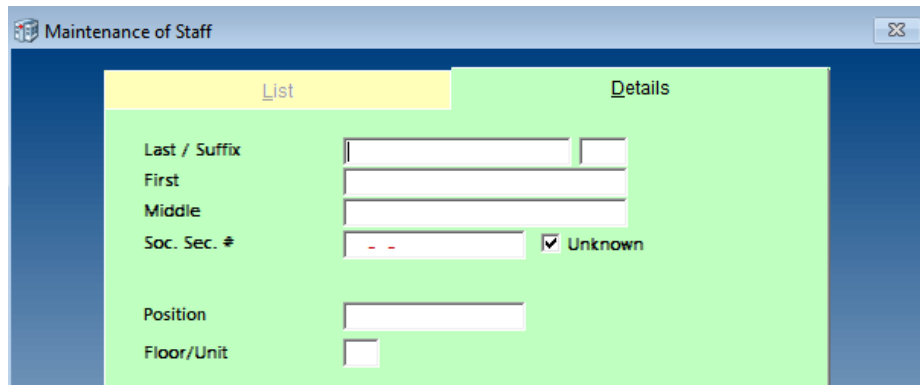
In order to track data on Staff or Others, basic information must first be entered for the individual. To enter employee information, first press the green icon on the Selection screen for STAFF (illustrated with #2 above) or the gray icon on the Selection screen for OTHER (illustrated with #3 above). When you do so, you will see a new icon appear. In the illustration below, we pressed the gray icon (#3) and a new MAINTAIN NON-EMPLOYEES (OTHER) button displayed to the right of the prior three buttons.



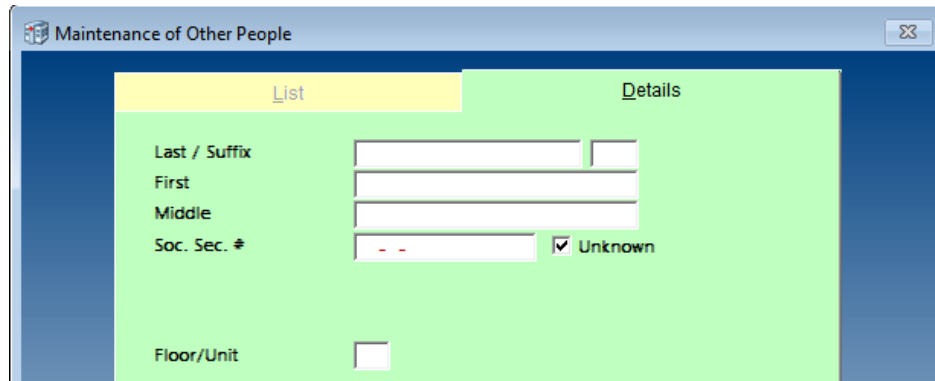
This will bring up an employee/other maintenance screen listing any employees that have already been input into the system. At the bottom will be a series of buttons – Edit, Insert, Delete.

Click **INSERT** to add a new employee/other to the list. Enter the information that you know about the individual. If you do not know or do not wish to track social security numbers, click the UNKNOWN box. When complete, press the SAVE button.

### Employee/Staff ADD



### Others ADD



To update information for Employees or Others, Highlight the individual in the appropriate list and then click the **EDIT** button. The current information will be displayed. Make your changes and then click **SAVE**.

When you have completed your adds and edits, click FINISHED.

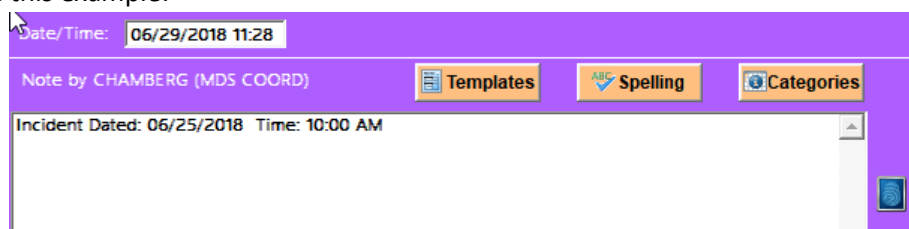
To get back to the RESIDENT selection list, click the orange, **CLICK HERE TO CHANGE PERSON** button. Now click the bed icon to display the resident list.

#### INSERT/EDIT/DELETE A NEW STAFF/OTHER EVENT

The screens and the functions are the same whether working with a resident list, an employee list, or the other list. Once the employee or other person is added to the appropriate list, you may select the name from the list just as you did when selecting a resident. **INSERT** button will allow you to enter data for a new event just as you did for resident accidents or incidents. To edit an existing event, highlight the record to turn it blue, then press the **EDIT** button. Make adjustments as necessary. To delete a record, you will also highlight the record until it is blue and then press the **DELETE** button.

#### ADD NOTES TO ACCIDENT/INCIDENT RECORD

You will notice on the STAFF/OTHER RECORD SCREEN and then each of the data entry screens there is an **ADD NOTE** button at the bottom of the window. This button will allow you to record notes. If you have highlighted an event on the STAFF/OTHER RECORD SCREEN or are working in an event when you push the button, you will be asked if you want identifying information to carry forward. If you answer YES and then create a note, the first line will show like this example:



Note that these notes are NOT visible in the Progress Notes module (only resident notes are in that module). To review, you must do so through the Accident/Incident module.

## Analytics/Reports

### Incident Report

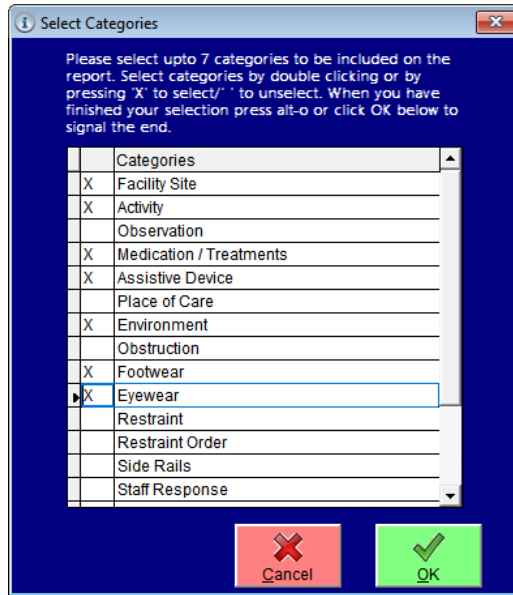
The Incident Report configuration screen

(R)esidents/(E)mployees/(O)ther? (Blank for all)	R
Individual?	Yes
Date range to be reported on?	Month to Date 06/01/2018 06/15/2018
(A)ccident, (I)ncident or (B)oth	B
(F)all, (N)o fall or (B)oth	B
Separate by Unit?	No
Limit printing to specific unit?	<input type="checkbox"/>
Shading?	Yes

OK Cancel

1. Enter **R**, **E**, or **O** to indicate whether you wish to gather information for Residents, Employees, or Others. If you wish to review all data sources, leave this field **blank**.
2. Use the drop down to select **YES** if you want a report for a single individual. If you want information on all, then select **NO**.
3. You can select from a variety of **PRESETS** (month to date, year to date, quarter to date, etc.) or you may select **CUSTOM** and enter your own **DATE RANGE**.
4. Determine whether you want to see just those items you have labeled as **ACCIDENTS** or **INCIDENTS** or whether you wish to see **BOTH**.
5. Indicate whether you want to see only those events due to falls, only those without a fall, or both.
6. Decide if you want a report to separate the information by unit.
7. Indicate whether you want the report to be limited to one specific unit.
8. If you want every other line to be shaded for easier reading, indicate YES.

When you click OK to proceed, you will be shown a list of all of your categories. You may select up to 7 of your categories at one time (the paper is only so wide). To select a category, double mouse-click in the box preceding the title of the category. An X will appear.



If you wish to generate a summary report by resident of all accidents or incidents, DO NOT select any categories. Click FINISH to produce the report.

Each of the reports has a column called FLAG. F = Fall, A = Accident, and I = Incident

Example 1: Detail with seven selected categories.

All Accident/Incident Reports for Residents  
For the Period of: 01/01/2018 - 06/15/2018

Name	Date	Time	Flag	Facility Site	Activity	Medication /	Assistive Device	Environment	Footwear	Eyewear
**** Month -- February, 2018										
ABOUT, [redacted]	2/5/2018	10:00	F A							Glasses on
AAA B, [redacted]	2/7/2018	09:00	A	Hallway	Slip off chair	N/A	Not used properly	Dry	Footwear on	Glasses off
**** Month -- May, 2018										
AAA B, [redacted]	5/25/2018	10:45	F I	Other	Showering	N/A	Used properly	Wet	Footwear on	Glasses on
ALCOTT, [redacted]	5/31/2018	09:00	I	Chapel	Pt. victimized	N/A	Used properly	N/A	N/A	Contacts in

Example 2: Summary of same period (no category selections).

All Accident/Incident Reports for Residents  
For the Period of: 01/01/2018 - 06/15/2018

Name	Date	Time	Flag
**** Month -- February, 2018			
ABOUT, [redacted]	2/5/2018	10:00	FA
AAA B, [redacted]	2/7/2018	09:00	A
**** Month -- May, 2018			
AAA B, [redacted]	5/25/2018	10:45	F I
ALCOTT, [redacted]	5/31/2018	09:00	I

## Audit Report

On the report configuration screen, enter R(esident), E(mployee), or O(ther) and specify the date range for the report. On the category selection screen, select up to 7 categories to include on the report by placing an “X” in the first column. Click on the OK button to produce the report.

This report has multiple sections

- Number of incidents with minor or no injury reported during the time period by unit and shift. A total for the facility is also given.
- Number of incidents with serious injury reported during this time period by unit and shift. Again, facility totals are also included.
- Residents (name, social security number, medical record number, room) with one or more accidents or with multiple incidents during the reporting time period.
- Predominant factors for each of the categories that you have selected.

## Statistical Report

This option will create a statistical report for all data between two dates. The report can be generated for just residents, employees, or others, or for all combined.

This report will show you each of the categories and the items that were selected for each during the time period you entered. The number of occurrences for each item as well as the *percentage of events* having that item. NO RESPONSE indicates that none of your items were selected for that category. No percentage is calculated.

An Example:

Below, first you will see the Incident Report for three categories and then will follow a snippet of those same three categories in the Statistical Report.

All Accident/Incident Reports for Residents  
For the Period of: 01/01/2018 - 06/18/2018

Name	Date	Time	Flag	Injury Type	Treatment	Disposition
**** Month -- February, 2018						
ABOUT, [REDACTED]	2/5/2018	10:00	F A			
AAA B, [REDACTED]	2/7/2018	09:00	A	Bruise	Nursing Rx	Ice Pack
**** Month -- May, 2018						
AAA B, [REDACTED]	5/25/2018	10:45	F I	Hematoma/Abrasion Laceration	Nursing Rx Physician Rx	X-ray
ALCOTT, [REDACTED]	5/31/2018	09:00	I	Other	Nursing Rx	Ice Pack

Notice that INJURY TYPE and TREATMENT have an event for resident AAA with more than one item per category. In the Statistical Report below these will be noted with “1 event had multiple entries”. Also notice that the first event for resident ABOUT has no responses for any of the three categories. This will also be noted in the report below and these counts will be *excluded* from the calculation of percentages.

The percentage shown in the Statistical Report says – of the number of events *with responses*, what percentage of those responses had this particular item for this category. The percentages are independent of one another and will not necessarily add to 100%.

**Injury Type**

Bruise	1	33.33%
Hematoma/Abrasion	1	33.33%
Laceration	1	33.33%
Other	1	33.33%
No Response	1	

1 event had multiple entries

**Treatment**

Nursing Rx	3	100.00%
Physician Rx	1	33.33%
No Response	1	

1 event had multiple entries

**Disposition**

Ice Pack	2	66.67%
X-ray	1	33.33%
No Response	1	

How to read the above report –

- For INJURY TYPES, of the three events with responses, one-third had a response of bruise (AAA), one-third had a response of hematoma (AAA, second event), one-third had a response of laceration (AAA, second event), and one third had a response of other (ALCOTT).
- For TREATMENT, of the three events with responses, all of them had a response of Nursing and one-third had a response of physician (AAA, second event).
- For DISPOSITION, of the three events with responses, two-thirds had a response of ice pack (AAA, first event, and Alcott), and one-third had a response of x-ray (AAA, second event).
- The line No Response corresponds to resident ABOUT in all instances and is not included in the percentage calculation.

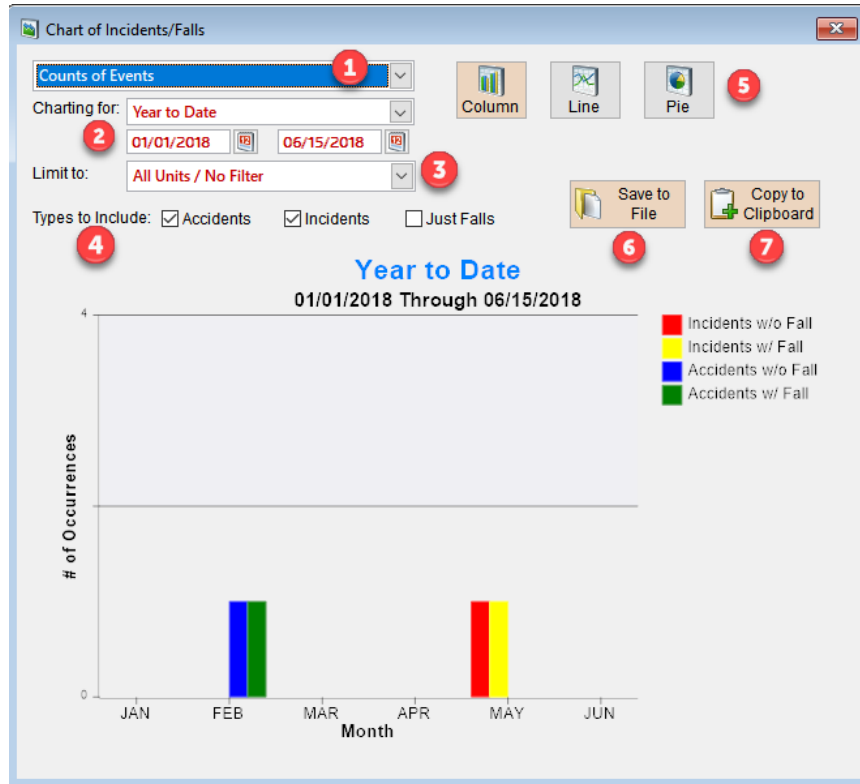
**Chart of Occurrences**

The computer running this report must have Microsoft Excel installed on it. The export to excel will develop a spreadsheet showing each hour and then every quarter of an hour. Then it will show the number of accidents, the number of incidents, and the total for each of those time periods. The data is then also displayed graphically.



## Various Charts

This allows you to select a variable (Count of Events, Days of the Week, Shift, and Time Ranges) for a period of time. You may also select one of your categories to review. The category will show the number of times an item was charted during the period of time. As you make selections the chart will appear in the bottom portion of the window.



1. This is a drop down that allows you to select the variable/category that you wish to review.
2. You may use the drop down to select a preset date period or you may enter a custom date range of your choosing.
3. Decide if you want to filter by a specific unit or all units (no filter).
4. You may filter to include accidents, incident, or both. You may also filter to show only those with falls. Simply mouse click in the box next to what you wish to see. It will place a tick in the box. To remove a tick, mouse click again.
5. You have an option to select the type of chart you want to display – column, line, or pie. Note, not all chart types are suitable for all variables. For example, line graphs may not be available for every variable you select.
6. SAVE TO FILE allows you to save the chart you have created. A bmp file will be saved to your desktop. Carefully read the message that pops up in the upper right corner so you know the exact **location** and **file name**.

Chart was successfully saved to C:\USERS\CHRISTINE\DESKTOP\VISRMS EXPORT\COLUMNCHART20180622120116346.BMP  
Hit any key to continue

- COPY TO THE CLIPBOARD allows you to clip (as if you had pressed the windows command Ctrl C for copy) and then paste it into a document. Position your cursor in the document where you want to insert the chart and then press Ctrl V (windows command for paste).

### Review Charts of Occurrences

This option generates comparison line charts for selected time periods. The screen displays with the information for the past two months displayed. Use the pull-down to the right of the **CHARTING FOR** field to select a different time period. The **REFERENCE DATE** will default to the current date. If you want a different period in time, change the reference date back in time. For example, this is June. You have a choice of **CURRENT MONTH** (June) or **PRIOR MONTH** (May). To see April detail, all we would have to do is set the Reference Date back to April 30.

In the illustration below, the reference date as been set to mid-June 2018. We then selected **YEAR TO DATE** for our charting period. This gives us a monthly chart for January through mid-June.

