### Introduction

This reference guide is aimed at Managers who are required to generate reports using existing Report Layouts and save these reports & associated filtering to their *"My Reports"* page

# **Note:** The terminologies used in this guide maybe different in your organisation

### Previewing RiskMan Incident Reports

To preview an Incident report, from the menu select *Reports -> Incidents* 

ayout Choice Select Layout: Age Group Analysis	Customise Layout
Report Type	
	🔍 Word Document (DOC) 🔘 Excel Workbook (XLS) 🔘 Excel Workbook (XLS Data Only) 🔘 Rich Text Format (RTF)
Date Selection	Time Selection
All Dates R Estantial Dates -	All Times     Selected Times
3	
Where Incident Date 👻	
is from 1 Jul 2012 to 31 Jul 2012	
Report Filter Options	
Standard Advanced 5 report will be	reviewed using Standard criteria.
By Classification:	
By Contributing Factor	
By Journal Type:	
By Incident Involved:	Exclude Items Without Any Contributing Factors?
By Preventability:	Consolidate Group Incidents
By Facility:	Incident ID(s)
By Location:	Medical Record =
By Patient Statusi	Staff Mbr ID(s)
	First Name
By Severity:	Surname
By Specialty:	
By Aggregate:	
By Service:	Report Comment/Footnote
By Source Of Notification:	6
By Body Part Affected:	· ·
By Custom Selection:	

RiskMan comes with a set of pre-defined Incident reports. All aggregate reports *(with the exception of the By Classification.... and By Contributing Factors reports)* can be customised to suit your organisation's needs by clicking on the **Customise Layout** button.

**Note:** Refer to the **RiskMan Incident Custom Reports Guide** for more information on how to create custom report layouts

## Step 0: Select a Layout Choice

The first step to previewing a RiskMan report is to select a report style from the **Select Layout** down list at the top of the screen. The list of reports that will be available to you in the **Select Layout** list will be dependent on whether the reports have been Site/Region restricted. If they have, then you will only see reports in this list that match your User Profile "Site/Region" restrictions and those that have not been restricted.

All RiskMan aggregate reports (reports showing collective statistics about incidents) collate adverse incidents into sections grouped by various fields.

It is optional to display a chart in an Aggregate report. If the report needs a chart, this can be done through the Custom Reports, by clicking on the **Customise Layout** button - refer to the **RiskMan Incident Custom Reports Guide** for more information.

Selecting the report type is equivalent to deciding "What question do I want to ask about my adverse incidents?" Examples of reports include: Q. WHERE are Adverse Incidents occurring?

- A. Select... **"By Site"** or **"By Location"** or
- Q. WHEN are Adverse Incidents occurring?
- A. Select... **"Time Of Day Analysis"** or **"Day Of Week Analysis"**
- Q. WHO are the people involved in Adverse Incidents?
- A. Select... "By Incident Involved" or "Age Group Analysis" or "By Patient Status"
- Q. WHICH DIVISIONS of the Organisation are associated with the Adverse Incidents?
- A. Select... "By Program" or "By Aggregate" or "By Specialty"
- Q. What is the **NATURE** of the Adverse Incidents?
- A. Select... "By Classification" or "By Classification - Summary" or "By Classification – Summary (Extended)"
- Q. What is the **SEVERITY** of the Adverse Incidents?
- A. Select... "By Outcome"
- Q. WHY is an Adverse Incident occurring?
- A. Select... "By Contributing Factor"
- Q. What is the **NOTIFICATION PROCESS** for Adverse Incidents?
- A. Select... "By Notification Delay" or "By Source of Notification"
- Q. What is the **RISK** posed by Adverse Incidents to the Organisation?
- A. Select... "By Risk Stratification"

Other available (non-aggregate) reports showing more detailed degrees of information about incidents include...

"Comprehensive Adverse Incident Report" (shows all standard incident fields) "Comprehensive Custom Report" (only shows fields the user has permission to) "Batched Insurer Report" "Journal Analysis" "Notifications" "Pending Feedback Requests

Non-aggregate reports do not have attached charts

### Comprehensive Custom Report

The Comprehensive Custom Report is a detailed report, only displaying the sections and fields that you have permission to view as stipulated by your user permissions. On selection of this report there will be an option to display the **Review History** at the bottom of the report and specify the order in which the **Journals** appear i.e. Date or Journal Type order

**Note:** The **Comprehensive Adverse Incident Report** only shows the standard Incident fields and is not customised to suit your organisation's Incident form. Generally, this report is not used. Your system administrator may have applied a restriction to the amount of record youre able to produce at one time. This helps with system performance.

Incident Reports	
Layout Choice Select Layouti Comprehensive Custom Report	Castoniise Layout
Report Type	
Standard Format (RPT)  Portable Doc Format (PDF) V	iord Document (DOC) 🔘 Excel Workbook (XLS) 🔘 Excel Workbook (XLS Data Only) 🔘 Rich Text Format (RTF)
Date Selection	Time Selection
All Dates Selected Dates	All Times O Selected Times
where Incident Date -	
is from 1 Jul 2012 to 31 Jul 2012 Report Filter Options	
	wed using Standard criteria.
By Classification	ningo aping premoting ringing.
By Countydening Pectan           By Jone 1 Type:           By Jone 1 Type:           By Tyrcality:           By Tacation:           By Pectantian:           By Pectantian:           By Second Total           By Second Total	
Preview Save Report	

To specify the order in which the Journals appear on this report

- Check mark the Journal Order = Date if the Journals are to appear in Date Entered order (see example below)
- Check mark Journal Order = Journal Type if the Journals are to appear in Type order e.g. Correspondence Received, Correspondence Sent

# To print the Review History on the Comprehensive Custom Report

3. Check mark the **Print Comprehensive Custom Report Review History** option (see example below)

Date/Time	Journal Entry			Reference	Cost
ournal Type:	Preventative Recommendation	ons			
created by:	Esler, Scott D. (Scott Esler)				
0 Oct 04 11:54:21	Erect warning signs				
	Actioned:	No		Mail Sent On:	
ournal Type:	Action Taken				
reated by:	Esler, Scott D. (Scott Esler)				
0 Oct 04 12:14:02	Signs erected				
	Status:				
	Actioned:	No		Mail Sent On:	
ournal Type:	Action Taken				
reated by:	System Manager (Manager)				
0 May 05 11:23:00	We put some warning signs	up			
	Status:				
	Actioned:	No		Mail Sent On:	
Jocumentes					
	No Attached D	ocuments.			
29 Jun 2007 12:16	System Man	ager (Manager)	Incident first viewed.		
9 Feb 2012 12:55		ager (Manager)	Most recently viewed.		
9 Feb 2012 12:55		ager (Manager)	Unposted incident edited.		
9 Feb 2012 12:55	System Man	ager (Manager)	Posted incident edited.		
9 Feb 2012 12:56		D. (Scott Esler)	User Alerted and Email SENT.		

**Example:** Comprehensive Custom Report showing the Journals in Date Entered order and the Review History

### **Non-Customisable Reports**

The following aggregate reports contain charts, but are not customisable reports because of the layout of the report:

- By Classification
- By Classification Summary
- By Classification Summary (Extended)
- By Contributing Factor

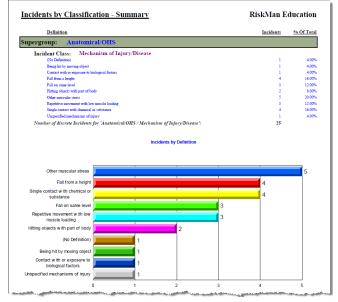
When you select one of these reports, the following options will display in the filtering section of the Reports page;

- Chart Types (see example below); or
- Print Chart Only (see example below)

For all other customisable aggregate reports, the option to print a chart as well as selecting a chart type is achieved via the Custom Report Builder page - refer to the *RiskMan Incident Custom Reports Guide* 

**Note:** You can create a custom report based on the RiskCat Classifications as well as the Contributing Factors via the Custom Report Builder page – refer to the **RiskMan Incident Custom Reports Guide** 

Layout Choice Select Layout: By Classification - Summary	Customise Layout
Report Type	
🗇 Standard Format (RPT) 🖲 Portable Doc Form	at (PDF) 💿 Word Document (DOC) 💿 Excel Workbook (XLS) 💿 Excel Workbook (XLS Data Only) 💿 Rich Text Format (RTF)
Date Selection	Time Selection
All Dates	All Times O Selected Times
Report Filter Options	
Standard Advanced Your repo	rt will be previewed using Standard criteria.
By Classification:	
By Contributing Factor:	
By Incident Involved:	
By Preventability:	Print Chart Only?
By Facility:	Incroence (U(B)
By Location:	Medical Record #
By Patient Status:	Staff Mbr ID(s)
By Severity:	First Name
By Specialty:	Surname
By Appregate:	Chart Type
By Service:	3D Column     Bar (Horizontal)
By Source Of Notification:	Bar (Horizontal)     Bar (Vertical)
By Body Part Affected:	Ber (vertical)     De
By Custom Selection:	© Time Line
	Report Comment/Footnota;
	A
	*



**Example: By Classification Summary** report using the Bar (Horizontal Chart). In this report an incident can have multiple classifications so potentially an incident can be counted more than once if it has been classified more than once

### Step 2: Select an Output Format

Nominate the file format in which the report is required.

- Standard Report (RPT): The report is produced as a standard "web page"; with no pagination (i.e. no headers/footers/ page breaks)
- Portable Doc Format (PDF): The report is created using the Adobe<sup>™</sup> PDF format. The advantage of this format is that it cannot be edited
- Word Document (DOC): The report is created in the Microsoft<sup>™</sup> Word format, and may be edited using MS Word<sup>™</sup>, if available
- Excel Workbook (XLS): The report is created in Microsoft<sup>™</sup> Excel, and may be edited using MS Excel<sup>™</sup>, if available. The report <u>will not</u> be displayed in a spreadsheet format. If this is required use the Excel Workbook (XLS Data Only) option
- Excel Workbook (XLS Data Only): The report will open in Microsoft<sup>™</sup> Excel in a spreadsheet format. For more details, refer to the section "Exporting Report Data to Spreadsheet Format" in this document
- Excel Workbook (XLS Grid Format): The report will open in Microsoft<sup>™</sup> Excel in a spreadsheet format. For more details, refer to the section "Exporting Report Data to Spreadsheet Format" in this document
- Rich Text Format (RTF): The report is created in an RTF document format which is editable by a variety of document editors e.g. Word<sup>™</sup>

**Note**: All output formats above where the report is an aggregate report, <u>with the exception of Excel Workbook (XLS Data Only) and</u>

(XLS Grid Format), can produce an attached chart at the end of each report (where applicable). Excel<sup>™</sup> simply creates a data export in flat (one row per incident record) format, with optional grouping fields, and no attached chart. However, charts can be created in Excel<sup>™</sup>.

### **Exporting Report Data to Spreadsheet Format**

There are two options for exporting data to Excel in RiskMan, determined by your **Report Type** chosen on the report configuration page:

- Excel Workbook (XLS Data Only), and
- Excel Workbook (XLS Grid Format)

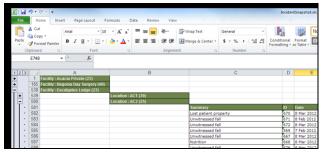
The **XLS Data Only** option will put your data into a 'flat' format (i.e. 1 row per record). You will need to create a **Layout** specifically for exporting your desired data.

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Hor	ne Insert	Page	Layout Form	iulas Data	Review View Ad	id-Ins Acrol	bat		
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Paste	ormat Painter	BI	<u>u</u> - 🖽 -	3•• <u>A</u> ·≣≡≡	: = : : : Mer	ge & Center *	\$ - % , 38 -38	Conditional Format Formatting * as Table *	Calculatio
Clipbo			Font	6	Alignment	6	Number 5	Formatting + as rable -	
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AI	•	1 m	J# 89						
ViewRep	ort.aspx [Read-	Only] [C	ompatibility Mo	ide]				-	= x
A	В	C	D	E	F	G H		K L M	N
1 89	👁 Jan 2006	09:40	80 to 89	ISR 4 MINOR	Acacia Private	Ward B Gene	ral Pt fell from chair. N	o injuries sustained	
2 117	1 Jan 2006	00:15	90 to 99	ISR 4 MINOR	Acacia Private	Ward A Gene	eral Pt found lying on the	floor. No injuries noted	t l
3 142	30 Jan 2006	00:30	70 to 79	ISR 3 MEDIUM	Acacia Private	Ward A Gene	eral Pt found in bathroon	n on the floor fitting	
	3 Jan 2006	(None	0 to 9	ISR 4 MINOR	Acacia Private			and an Table of an able	to parfor
4 143			0 10 3				op:Inappropriate equipri		
4 143		08:30	0 to 9 70 to 79	ISR 4 MINOR	Acacia Private		op Inappropriate equipn		to perior
	4 Jan 2006					Ward B Orthr	op Inappropriate equipn op Pt give another patie op Pt was given incorre	ent medications	
5 144	4 Jan 2006	08:30	70 to 79	ISR 4 MINOR	Acacia Private	Ward B Orthr Ward B Orthr	op. Pt give another patie op. Pt was given incorre	ent medications ct tablets oxycontin 10	
5 144 6 145	4 Jan 2006 4 Jan 2006	08:30 08:30	70 to 79 90 to 99	ISR 4 MINOR ISR 3 MEDIUM	Acacia Private Acacia Private	Ward B Orthr Ward B Orthr Ward A Obst	op. Pt give another patie op. Pt was given incorre etri Pt given wrong medi	ent medications ct tablets oxycontin 10 cation	mg. NUN
5 144 6 145 7 146	4 Jan 2006 4 Jan 2006 3 Jan 2006	08:30 08:30 13:50 19:30	70 to 79 90 to 99 30 to 39	ISR 4 MINOR ISR 3 MEDIUM ISR 4 MINOR ISR 4 MINOR	Acacia Private Acacia Private Acacia Private	Ward B Orthr Ward B Orthr Ward A Obst Ward A Gene	op. Pt give another patie op. Pt was given incorre etri Pt given wrong medi eral Pt absconded from I	nt medications ct tablets oxycontin 10 cation nospital. Brought back	mg. NUN
5 144 6 145 7 146 8 153	4 Jan 2006 4 Jan 2006 3 Jan 2006 5 Jan 2006 5 Jan 2006	08:30 08:30 13:50	70 to 79 90 to 99 30 to 39 90 to 99	ISR 4 MINOR ISR 3 MEDIUM ISR 4 MINOR	Acacia Private Acacia Private Acacia Private Acacia Private	Ward B Orthr Ward B Orthr Ward A Obst Ward A Gene Ward A Gene	opiPt give another patie opiPt was given incorre etriPt given wrong medi anal Pt absconded from I anal Found patient on flo	ent medications ct tablets oxycontin 10 cation hospital. Brought back or no injury sustained	mg. NUN
5 144 6 145 7 146 8 153 9 156	4 Jan 2006 4 Jan 2006 3 Jan 2006 5 Jan 2006 5 Jan 2006 7 Jan 2006	08:30 08:30 13:50 19:30 18:30	70 to 79 90 to 99 30 to 39 90 to 99 90 to 99	ISR 4 MINOR ISR 3 MEDIUM ISR 4 MINOR ISR 4 MINOR ISR 4 MINOR	Acacia Private Acacia Private Acacia Private Acacia Private Acacia Private	Ward B Orthr Ward B Orthr Ward A Obst Ward A Gene Ward A Gene Ward A Gene	op. Pt give another patie op. Pt was given incorre etri Pt given wrong medi eral Pt absconded from I	ent medications ct tablets oxycontin 10 cation hospital. Brought back or no injury sustained o the toliet	mg. NUN

Sample "XLS Data Only" output

It should be noted that the XLS Data Only output will not export the names of the fields you have exported as column headers in the resulting spreadsheet.

The **XLS Grid Format** option is designed to utilise your <u>existing layouts</u>, and will export your data with the grouping used in the layout, and <u>will</u> include column headers.



Sample "XLS Grid Format" output

It should be noted that the XLS Grid Format output option will not export any data from sub reports included in your report layout.

### Exporting to Excel using the "XLS Data Only" output

If you wish use the XLS Data Only report type, you will need to create a report layout that contains all your fields on **one row**. You can select up to 30 fields to be included in the report.

The following <u>will not</u> be exported to Excel™

• Report Title & Organisation Title

- Layout Options & Colour schemes from the Report
  Settings
- Page Headers
- Charts

Consider the following when setting up your report:

- 1. In the **Report Settings** set the **Page Type** and **Page Size** so that you can fit all the fields on one row
- 2. In the **Details** section drag & drop up to 30 fields on Row 1 (only)

**Tip:** Each time you add a field, make the width of the field as small as practical so you can still recognise what the field is - you may also wish to relabel the field e.g. "Incident ID" to "ID"

### Step 6: Select a Date/Time Period to Review

The next step is to define the **date period** to which this report applies. In the **"Where"** list select what type of date you will be basing this report on.

**Note:** The list of date fields and which date is selected by default is customisable. For those with suitable permissions, the date list is customised from Administration -> List & Codes Maintenance under the **(Incidents) Incident Report Date Selection** list. You can add and remove dates as required

Date Se	lection		Time Selection
O All C	Dates 💿 Selecter	Dates	All Times O Selected Times
Where	Incident Date	•	
is from	1 Jan 2010	to 30 Apr 2012	

Note: The date selection can be shown in the footer of every page

- To run the report over all date periods click the
   [O All Dates] option
- To run the report over a specific period, click the
  [
   Selected Dates] option. Select the date type from
   the "Where" list and enter the [Is From] and [To] dates
   to define the period over which the report will be run

The list of dates can be based on any date field on your Incident Entry form. Some of the dates that may appear in your **"Where"** list might include:

- Incident Date: When did the incident occur
- Notification Date: When did you find out about the incident
- First Posted Date: When was the incident first reviewed and accepted/posted
- Last Posted Date: When was the incident last reviewed and accepted/posted
- Date Closed: When was the incident Closed
- Rec # Completed Date: When were the recommendations # completed (*if the Formal Review section has been added to your Incident Form*)

**Note:** # represents the specific Recommendation number. There can potentially be 8 recommendations.

#### Optionally a time period can also be selected

Date Selection	Time Selection	
All Dates      Selected Dates	All Times  Selected Times	
Where Incident Date 👻	From: 09:00 To: 13:0	0
is from 1 Jan 2010 to 30 Apr 2012		

- To run the report over all time periods within a selected date range or all dates, click the [O All Times] option
- To run the report over a specific period, click the
   [O Selected Times] option. Then enter the [From] and
   [To] times to define the period over which the report will be run

**Note:** The times must be in a 24 hour period between 0:00 and 23:59. If you wish to run your report over a 24 hour period e.g. 7pm – 7am it will be necessary to create a **Shift** report – refer to the **RiskMan Incident Custom Reports Guide** 

## Step 4: Apply Standard Report Filtering

Standard Filtering which is available under the **Standard** tab, allows you to filter your reports based on pre-defined fields.

**Note:** The list of fields under the **Standard** tab is customisable. For those with suitable permissions, the fields are customised from Administration -> List & Codes Maintenance under the **(Incidents) Incident Report Filter Options** list. You can add and remove fields as required. These fields will only be "List" or "Classification Selector" fields. They will not include Yes/No field or Text fields. If you want to filter by one of those fields you will need to create a filter under the "Advanced" tab

**List Fields:** If the field is a list field e.g. Incident Involved, Site, Location, Program, and Outcome; check mark the field and select your criteria from the list. To select more than one item in the list hold your **CTRL** button and select as required

**Classification fields:** If the field is a classification field e.g. RiskCat or Contributing Factors, check mark the field and the Classification selector will open. Select the classifications from the list (you can select more than one)

**Text/Numeric fields:** If the field is a text/numeric field e.g. Client/Medical/Unit Record #, Incident ID(s), First Name, Surname enter the details into the field

- Incident ID(s), Client Record #, Staff Mbr ID(s) If entering more than one ID separate the IDs with a comma e.g. 34,57
- First Name, Surname fields These fields are based on the person affected in the Incident. The wildcard "\*" can be used in these fields to denote other non-specific text e.g. If sm\*th\* is entered into the Surname field, then the report will search for all incidents where the

surname of the person affected is like "smith" or "smythe" where any letter can be substituted for the \*

	Incident ID(s)
	Medical Record #
	Staff Mbr ID(s)
	First Name
Sm*th*	Surname

### Selecting more than one filter criteria

If selecting more than one item in a field, the search will be conducted on an **"OR"** basis e.g. "Program = Emergency" OR "Program = General Medicine"

If selecting criteria from more than one field, then the filter will be based on an **"AND"** basis e.g. Report will only show incidents where ("Program = General Medicine" **OR** "Program = Emergency") **AND** ("Outcome = ISR 1 SEVERE" **OR** "Outcome = ISR 2")

### **By Custom Selection**

If you are unable to produce a report based on the standard filters

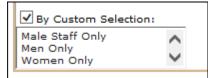
- That you would like to use regularly; or
- You are unsure how to use the Advanced Filters; or
- You are unable to create a Standard or Advanced filter

User defined custom selections can be created for your organisation

**Note:** Assistance with creating these selections can be done by contacting RiskMan support – support@riskman.net.au

### To use custom selections

- 1. Check mark "By Custom Selection"
- 2. Highlight the custom selection/s as required (hold CTRL key if selecting more than one)
- 3. You can combine Custom Selections with other Standard filters



### **Consolidate Linked Incidents**

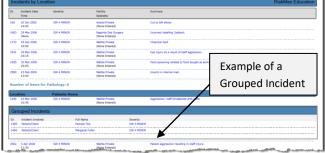
If checked, then Incident notifications that are linked (for example a client and a staff member are involved in an aggression related incident) will be classed as one event in the total count. The master notification for the selected date range will become the main incident for the report with an optional sub-list of linked incidents appearing underneath (this listing will be dependent on the selected date range).

If unchecked, each incident within a link will be counted as a separate incident and will appear so on the report. In order to display the linked incident notifications in a report, it will be necessary to create a "Linked Incident" sub-report in the custom reports (refer to the **RiskMan Incident Custom Reports Guide** for more information).

### To consolidate your linked Incidents

- 1. Select your report from the Select Layout list
- 2. Check the **Consolidate Linked Incident** option on the Incident Reports page (*as per example below*)
- 3. Press Preview (see example below)

Layout Choice						
Select Layout:	By Location (with Gr	oup Incident SR)	Cust	omise Layout		
Report Type						
Standard For	mat (RPT) 🔘 Port	able Doc Format (PDF)	Word	Document (DOC)	Excel Workbook (XLS)	Excel Workbo
Date Selection					Time Selection	
<ul> <li>All Dates</li> <li>Where Inciden</li> <li>is from 1 Jan 20</li> </ul>		30 Jun 2006			All Times C	Selected Times
Report Filter Op	tions					
Standard	Advanced	Your report will be	previewed	using Standard cri	teria.	
By Classifica By Contributi By Journal Ty	ng Factor:					
By Incident I	nvolved:			Exclu	de Items Without Any Co	ntributing Factors
By Preventat	ility:				olidate Group Incidents	
By Facility:					Incident ID(s)	
					Medical Record #	



**Example:** Incident Report showing the Master & Child Notifications of a Linked Incident

# Step 6: Apply Advanced Report Filtering

The Advanced Filter (available under the **Advanced** tab) will allow you to create your own filtering options for a specific report. If the filtering conditions are to be used again they must be saved with a selected report (see Step <sup>3</sup> for information on how to save reports)

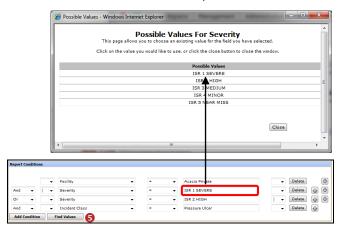
# **Note:** If using Advanced Filtering, the filtering from the Standard tab will not be used (and vice-versa)

Select Layoun By Location (with Group Incident SA)  Cantomise Layout  Report Type Sunderd Format (LPT)  Pertable Dor Format (DDF)  Word Document (DDC)  Excel Workbook (VLS) Excel Workbook (VLS) Date Only) Robits Text Format (RT) All Dates  Selected Dates All Times  Selected Times All Times  Selected Times All Times  Selected Times  Advanced Criteria  Standing Advanced Criteria  Report Conditions  Report Conditions  Report Conditions	Layout Choice	
Sundard Group (CPT) Periode De Formet (PDF) Word Decument (DOC) Excel Workback (XLS) Excel Workback (XLS) Data Only)  Rich Text Format (RTF)  Rich Te	Select Layout: By Location (with Gr	oup Incident SR) - Customise Layout
	Report Type	
Data Selection     Time Selection       All Data Selected Datas	Standard Format (RPT)  Porta	ible Doc Format (PDF) 💿 Word Document (DOC) 💿 Excel Workbook (XLS) 💿 Excel Workbook (XLS Data Only)
All Dess     Selected Dess     All Times     Selected     selected Times     selected     selected Time	Rich Text Format (RTF)	
All Dates  All Times  Calculate Dates  All Times  Calcula	Pata Calastian	The Columbus
Where Incident Date		
is from 1 Jan 2006 to 30 Jan 2006 Standard The Options Scheduler Advanced Voor report will be previewed using Advanced criteria. Report Conditions	All Dates Selected Dates	<ul> <li>All times U beletted times</li> </ul>
is from 1 Jan 2006 to 30 Jan 2006 Standard The Options Scheduler Advanced Voor report will be previewed using Advanced criteria. Report Conditions	where Traident Data	
Expand I         Advanced         Your report will be previewed using Advanced criteria.           Consolidate Group Incidents         Report Conditions		
Standard Advanced Veor report will be previewed using Advanced criteria. Consolicate Grapp Incidents Report Conditions	is from 1 Jan 2006 to 3	0 Jun 2006
Consolicite Grup Incidents Report Conditions	Report Filter Options	
Report Conditions	Characterist Advanced	Your report will be previewed using Advanced criteria.
Report Conditions	Standard Advanced	
· 		
Add Condition Find Values		
Add Condition Find Values	Consolidate Group Incidents	
Add Condition Find Values	Consolidate Group Incidents	
	Consolidate Group Incidents	7
	Consolidate Group Incidents Report Conditions	

### Create a filter

			7	2		3		4	7	8	9
6			•	Facility	•	-	-	Acacia Private		Delete	ł
And	-	(	-	Severity	-	-	-	ISR 1 SEVERE	-	Delete	ŵ
Or	-		•	Severity	-	-	-	ISR 2 HIGH	) -	Delete	ŵ
And	-		-	Incident Class	-	-	-	Pressure Ulcer	-	Delete	ŵ

- 1. Press Add Condition **1**
- 2. Select a field from the drop down list 2
- 3. Select a logical test 6
  - For List & Classification selection fields use =, <> (not equals), Is Null (empty), Is not null (not empty), Like, Not Like
  - For Date, Time or Numeric fields use =, <>, >, >=,
     <, <=, Is Null, Is Not Null</li>
  - For Text fields use Is Null, Is Not Null, Like, Not Like
- 4. Enter or select the criteria for the filter 4
  - Text fields: Enter the text. Wildcards "%" can be used e.g. Summary like %fall% which means the word "fall" must appear somewhere in the "Summary" field
  - Date fields: Enter the date as 1 Jan 2012
  - Time fields: Enter the time as 15:15 (24 hr clock)
  - Numeric fields: Enter the number e.g. 4, 50
  - List fields: Press the Find Values S button and select ONE value from the list (this ensures the correct criterion is selected).



RiskCat Classifications: Press the Find Values S
 button and select ONE value from the
 Classification list.

	Miscellaneous Operational Matters Pharmacy	Medication Process Method Of Delivery Medical Record Management Medical Record Management Unclassifiable Relevant Committee Criminal Activity Other Administrative / Contractual Equipment / Instruments Personal Property Personal Topyv Environmental Public Ilubility Other Other	
	Operational Matters	Medical Faccid Waxgement Medicator Administration Usclassifiable Relevant Criminista Criminal Activity Other Administrative (Contractual Equipment / Instrument Personal Property Encode Property Descent Property Encode Property Descent Property Encode Property Descent Property Encode Property Descent Property Encode Property Descent Property Descent Property Encode Property Descent Property Encode Property Descent Property Descent Property Encode Property Descent Propert	
	Operational Matters	Medication Administration Unclassifiable Relevant Committee Criminal Activity Other Administrative / Constructual Equipment / Instruments Personal Property Personal Injury Environmental Public Itability Other	
	Operational Matters	Unclassifiable Relevant Committee Cotimical Activity Other Administrative / Contractual Equipment / Instruments Personal Property Personal Property Environmental Public liability Other Other	
	Operational Matters	Relevant Committee       Crininal Activity       Other       Administrative / Controctual       Equipment / Instruments       Personal Property       Personal Property       Environmental       Public liability       Other	
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		Administrative // Constructual Equipment / Instruments Personal Property Personal Injury Environmental Public liability Other	
		Equipment / Instruments Personal Property Personal Topyry Envicenmental Public laubitry Other	
	Pharmacy	Personal Property Personal Injury Environmental Public Lability Other	
	Pharmacy	Personal Injury Environmental Public liability Other	
	Pharmacy	Environmental Public liability Other	
	Pharmacy	Public liability Other	
	Pharmacy	Other	
	Pharmacy		
	Pharmacy		
-			
		Dose change	
		ADR Docs	
		Change/recommended monitoring	
		Cease/withhold	
		Administration	
		Administrative	
		Initiation of drug therapy	
	Psychological Trauma	Restraint / Seclusion	
		Suicide	
_		Self Harm	
_		Other	
	Skin Integrity	Pressure Ulcer	
		Skjelear	
	Substance Abuse	Substarce Type	
		Used By	
		Found By	
		Used By	
	Weapons	Found By	

- If another condition is required e.g. The filter is based on more than one value from the same field or from different fields, press Add Condition 1
- If 2 or more conditions are added to your filter, select "And", "Or", "But Not" <sup>(3)</sup> at the beginning of the Condition (not required for the first condition)

When to use "And": When more than one condition must be met e.g. "Facility = Acacia Private" AND "Incident Class = Pressure Ulcer", then both conditions must be met before the incident notification is included in the report

When to use "Or": When at least one condition must be met e.g. "Outcome = ISR 1 Severe" OR "Outcome = ISR 2 High", then only one of the conditions must be met before the incident notification is included in the report

When to use "But Not": Used with the RiskCat Classifications only; e.g. if you select "Incident Class = "Fall" BUT NOT "Incident Class = Self Harm", then if the incident has a definition selected from the "Fall" class but also has a definition selected from the "Self Harm" class, it will <u>not</u> be included in the report

If required add Brackets 
 around the conditions.
 Brackets may be required around some conditions to
 ensure the alert is triggered correctly

A common scenario where you would need to use brackets is when:

- You have more than one condition to test for, and
- At least one of those conditions has more than one option that could satisfy it

			Ŧ	Facility	•	-	Ŧ	Acacia Private		-	Delete	0
And	-	(	Ŧ	Severity	-	-	-	ISR 1 SEVERE		•	Delete	4
Or	-		Ŧ	Severity	-	-	-	ISR 2 HIGH	)	•	Delete	4
And	-		-	Incident Class	-	-	-	Pressure Ulcer		-	Delete	ŵ

**Example:** In this advanced condition there are 3 distinct conditions: Facility, Severity and Incident Class, but Severity has 2 options. Therefore, we would place a bracket at the beginning of the first Severity condition and one at the end of the second Severity condition

- If you wish to delete a condition press the Delete <sup>(3)</sup> button next to the condition. You may need to modify your "Or", "And" or "But Not" options and your brackets
- 9. If you wish to re-order your condition statements use the Directional <sup>(c)</sup> buttons - Up <sup>(c)</sup> or Down <sup>(L)</sup> next to the respective condition. You may need to modify your "Or", "And" or "But Not" options and your brackets

### Additional Incident fields available for filtering

In addition to the fields that are available from your Incident Entry form, there are some 'virtual' fields that can also be used. They include

- Incident Day Name: Can be used to filter your report by particular days of the week e.g. Incidents that have occurred over a weekend - Saturday & Sunday
- Is Linked Incident: Can be used to only show Incidents that are included in a link only notification
- Is Master Incident: Can be used to only show the Master (i.e. source) report in a group only notification

- Journal Has Been Modified: Can be used to filter Incident Reports where the Journal entry has changed
- Sequence: This field represents the number of times the posted version of the Incident has been posted. For example, if Sequence = 1 then you are wanting to report on the first time the incident is posted
- Sequence No: Not relevant in Incident Reports because the notifications in the reports must be Posted

# Step 6: Add a Footnote

All aggregate reports may be annotated to include a footnote on the last page, directly under the chart.

If required, enter comments into the **Report/Comment** Footnote box.

If you wish to edit the footnote (as a result of analysing your report)

- Enter a comment such as "Enter Comments here". This will enable a text box to appear at the end of your report
- Output the report to Word™
- You can then edit the footnote by removing the words "Enter Comments here" and entering your Analysis

ID Incident Date Severity Time	Facility Specialty	In this example you can
Report Criteria (If Applicable)		expand the text box and
Incident Date from 1 Jan 2006		enter your analysis of
Incident Date to 30 Jun 2006		the report
Classifications Anatomical/OHS		

# Step 🕖: Preview Report

Click the **[Preview]** button to display an onscreen preview of the selected report.

### Step 8: Save Report

The selected report, date selection type and filter criteria can be saved to your **"My Reports"** page. MyReports is your personalised list of reports. By selecting a report from your **"My Reports"** page all that is required to run the report is to select a date range and the output format e.g. PDF, Word<sup>™</sup>, Excel<sup>™</sup>. Users with suitable permissions can then share their saved reports to selected users or templates. Depending on your permissions, you may also have access to save your report to the Reports Library. This allows you to save reports centrally where other users with suitable permissions can obtain a copy to keep in their own MyReports page. For more information about accessing and utilising the reports library, see the *Report Library guide*.

### To save a report

- 1. Select a report from the Select Layout list
- 2. Select the **date type** from the **"Where"** list that will be used e.g. Incident Date
- 3. Select the criteria or create an advanced filter for the report e.g. Medication Incidents for a specific Site

### 4. Press Save Report

	Save Report
	-
Report Name 0	Monthly falls
Report Title 0	Monthly falls
Organisation Title 0	Acacia Private Hospital
Allow editing of the report titles at runtime? <b>0</b>	
Report Description / Comments ()	
	×
Sav	Close Close

Example: Saving a Report to your "My Reports" page

- **Required:** Enter the **Report Name** this will appear in the list of reports on your **My Reports** page
- **Required:** Enter the title of your report in the **Report Title** field. This title will appear at the top of every page in the report
- **Optional:** Change the **Organisation Title** if you wish to override the name of your organisation that appears in the top right corner of your report e.g. to your Campus name, enter here
- Optional: Select 'on' for "Allow editing of the report at runtime" if the users who have permission to run this report from their "My Reports" page are able to change the Organisation Title and Report Title prior to running the report
- Optional: Enter a description of the report in the Report Description / Comments dialogue box e.g.

Description of what is contained in the report; the target audience e.g. specific committee, board report; how often it should be generated - monthly, quarterly; the Report template used

- 5. Click Save
- 6. Click Close

Note: If you **do not** have access to the Reports Library, your report will automatically save to My Reports. If you **do** have access to the Reports Library, your Save Reports screen will look as below:

	Save Report
Report Name 0	Monthly falls
Report Title 0	Monthly falls
Organisation Title 0	Acacia Private Hospital
Allow editing of the report titles at runtime	a7 🛛 ON 🕕
	,
Report Description / Comments 0	
Save to My Reports 0	
Save to Library <b>0</b>	OFF OFF
	Save Close

You will have the option to either save the report to My Reports, to save to the Reports Library or both. For more information about saving to the reports library, see the *Report Library guide*.

### My Reports

Reports that you have saved from your Incidents Reports page or reports that you have access to view that have been shared to you, can be accessed from your **"My Reports"** page under the **"Reports"** menu option

**Note:** Your list of reports will show any Register specific reports that you have saved or have been shared to you e.g. Incidents, Feedback, Risk Register, and Quality Activity Reports

				My Re	ports				
Drag a column he	ader here to group	by that column							
Report Name	Report Title	Organization Title	Report For	Date Created	Comments	Permissions	View Generated	Delete	Added From Libra
1	7	2 2		• 9					
Acacia Private Incidents by Location	Acacia Private Incidents by Location	My Facility	Incidents	15 Nov 2013	This report summarises all patient/client incidents by location for Acacia Private, with a graph.	Edit Share		Delete	
Acacia Private Incidents by Location	Risidian Education	Education - V16	Incidents	21 Apr 2016	This report summarises all patient/client incidents by location for Acacia Private, with a graph.	Share		Delete	×
AH Provisional Clinical Issues Risk Report	Risit/Ian Education	Education - V16	Incidents	21 Apr 2016	Monthly report for the XYZ committee	Share		Delete	4
AH Provisional	Provisional	The Mark			Monthly report for				

### To group your list of Reports

- Click on the column heading that you wish to group your reports by e.g. "Report For"
- 2. Holding your mouse drag the column heading to the space provided at the top of your list of reports and release your mouse (*refer to example below*)

- 3. To save the grouping press Save Grid Layout
- 4. To return your grid layout to the default layout press Clear Grid Layout

My Reports									
Drag a column head	er h	ere to group by that col	umn Report Fo						
Report Name		Date Created	Report For	Report Title	Comments				
	•	8	• 🕈	8	۲				
TNH Quality Activities Report		Vhims NorthernHealth - Development	24 May 2016	Quality Activities	TNH Quality Activities Report				
Scheduled Audits b Title		St Elsewhere Hospital	29 Jan 2014	Audit Schedule or Results	Scheduled Audits by Audit Title	Scheduled Audits by Audit Title			
Scheduled Audits		St Elsewhere Hospital	29 Jan 2014	Audit Schedule or Results	Scheduled Audits	review of all Scheduled Audits			

### To change the order of the columns in your report grid

- 1. Click on the column heading that you wish to move and drag to the new position release your mouse (refer to example below)
- 2. Repeat step 1 until you have re-arranged your columns
- 3. To save your layout press Save Grid Layout
- 4. To return your grid layout to the default layout press Clear Grid Layout

My Reports								
	inization Title Date Created		Comments					
♥	<b>V</b> .	• 🕈	4					
Incidents	17 Feb 2011							
Incidents	10 Jul 2009		Wattle Private Incidents By Location					
Incidents	6 Oct 2010		Wattle Private By Location					
Incidents	22 Aug 2016		hello world					

### To filter the My Reports being displayed

- Beneath each column heading is a white text box where you can add filter criteria to your list
- 2. Type your filter criteria, and choose the type of logical test you wish to perform by clicking on the funnel icon (as per the below example)

	Report Name		Report Title		Organization T
	fall	9		Ŷ	
-	Report For: Incidents		Begins with		
	Client Falls by Facility &		Contains		RiskMan Educa
	Month		Doesn't contain		Tristman Educe
	Client Falls by Facility &		Ends with		RiskMan Educa
	Severity		Equals		
	Falls by Facility		Doesn't equal		Education
	Falls by Facility		Doesn't equal		Education

- 3. It is possible to apply filters to multiple columns
- 4. To remove a filter, simply delete the criteria (e.g. *fall* in the above example)

**Note:** Any filters you apply on this page will be **remembered**, even after logging out of RiskMan and logging back in.

### To change the number of displayed reports

- The default number of reports displayed on your My Reports page can be modified by selecting from the Rows Shown list
- If there are more reports than displayed on your My Reports page, you will have the option to scroll to view more reports

Falls by Facility	Incidents	Falls by Facility		
Falls Incidents per Month for Acacia Private	Incidents	Falls Incidents per Month		
Incident in Op Theatre	Incidents			
JK Provisional Clinical issues Report	Risks	Provisional Clinical issues Repo		
Page 1 of 3 (25 items) < [1] 2 Rows Shown 10 Save Grid La				
14				
14 16 18 20 25 30 40				

### To view a report

- 1. Click on the Report Name in the list
- 2. Select the Run Report Now tab
- 3. If the **Report Title** and **Organisation Title** fields are editable, before running the report you will have the option to change these titles if required e.g. adding the Month or Quarter at the end of the report title

Back to My Report	s My Reports
	Audit Result report
Run Report Now	Manage Report Schedules
seport Title:	Audit Result report ave blank for default)
organisation Title	: Vhims NorthernHealth - Development (Leave blank for default)
Date Range:	○ All Dates
From:	1 Apr 2017
To:	30 Apr 2017
File Format:	Portable Doc Format (PDF)
	Run Report

- 4. Select **All Dates** or **Selected Dates** and enter your date range
- 5. Select the output format for the report e.g. PDF, Word
- 6. Press Run Report the report will be displayed
- To return to your My Reports listing page, press the Back to My Reports button

### To schedule a report so that it is generated automatically

- 1. Click on the Report Name in the My Reports list
- 2. Select the Manage Report Schedules tab
- 3. Give your Schedule a meaningful name in the **Schedule Name** field e.g. Monthly Patient Falls Report

- Add a description for your schedule in the Schedule Description E.g. Generated on the 5<sup>th</sup> of the month for the Falls Sub Committee meeting
- 5. Determine the period of time over which the report will be run and enter this into the Report Time Frame field. For example, if you wanted to create a schedule that reported on the previous calendar month your settings here might read: The previous 1 Months(s) up to Prior Month End

Report Time Frame:	The previous 1	Months(s) 🗸	up to Prior Month End	<
6. Determi	ne how often	you would l	ike the report to	
generate	in the <b>Run Fr</b>	<b>equency</b> fie	eld e.g. Every <b>Mo</b>	nth
on the <b>5</b>	<sup>.h</sup> at <b>8:30am</b>			

				-			 	
Run Frequency:	Every	month	on the	5th	at	08	30	

 It is advisable to check the next two fields, which will confirm via email if the report was successfully generated or whether the schedule failed

### 8. Select Save Schedule

*Note:* You can set multiple schedules for a single report if required

Your saved schedule will appear in a table:

- Either highlight the users that have already been shared the report and press **Remove** or
- Highlight the templates that have been shared and press **Remove**

#### 4. Press Save to save your changes

teports *   Help *   Log Out USER: System Manager (Manager)						ger)	
	My Re	ports					^
	Date Created	Comments	Permissions	View Generated	Delete	Added From Librar	
. 🕈	• •	♥					
	15 Nov 2013	This report summarises all patient/client incidents by location for Acacia Private, with a graph.	Edit Share		Delete		
	21 Apr 2016	This report summarises all patient/client incidents by location for Acacia Private, with a graph.	Share		Delete	M	

Back to My Reports	Share My Report	Report Details		
	Wattle Private Ward Report - Share Permissions			
User Register: Incident V Template Convert	Planut 2	Incolutes Cinated on 17 Fee 2011 Cinated by Bystem Manager (Manager) Original report 1916 © Watter Phanek Strate Report Original argumentation the ©		
Demo & Testing Executive Manager Risk Manager Risk Manager	Canada Ca	Acms Ply L38		

#### To delete a Report

Note: The deletion of a My Report <u>cannot</u> be undone

- 1. Click on the Delete button next to the report name
- 2. The report will be removed from your "My Reports" list

Schedule Control	Report Schedule ID	Schedule Name	3.	If the report was schedule Status			en it will be
				deleted from the	r "My Reports"	ist	
<b>■</b> 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	1	Schedule for Monthly Patient Falls Report	Help	• Log Out		USER: S	ystem Manager (Manager)
<b>■</b> 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	2	Schedule for Weekly Patient Falls Report		My Reports			^

You have the ability to **Pause**, **Delete** or **Run** each saved Schedule using the controls indicated above

To return to your **"My Reports"** listing page, press the **Back** to **My Reports** button

### To share or edit a shared report

- Click on the Share or Edit Share button next to the report you wish to share/edit share on your My Reports page (this is a user permission)
- 2. To share a report:
  - Either search for specific users, highlight the users and press **Authorise;** or
  - Select the Register the template belongs to and then highlight the Template and press Authorise
- 3. To remove sharing on a report:

Help * Log	Out			USER: Sys	tem Manager (Manag
My Re	ports				
e Created	Comments	Permissions	View Generated	Delete	Added From Librar
- 💎	۲				
lov 2013	This report summarises all patient/client incidents by location for Acacia Private, with a graph.	Edit Share		Delete	
.pr 2016	This report summarises all patient/client incidents by location for Acacia Private, with a graph.	Share		Delete	V
	Monthly report for				

### Privacy and Security in Qualitative reports

Sometimes a user will not have permission to see a particular field such as when that field is set to 'do not display' in their User Template. The question is; will that field display when they run a report? The answer is that it depends on the configuration of your system!

For those that have access to Global Settings, this is where that feature is controlled. (see Global Settings guide). The system administrator can control whether report fields to which the user doesn't have permission are masked when the report is generated. They can also control what mask to use when obscuring 'don't display' fields (e.g. \*\*\*\*\* which is the default).

Below is an example of the same report generated by the same user with the field masking option both on and off:

Field masking Global Setting off:

Incident ID Clinical review	Incident date / progress notes	Incident time			
1 On review not	17 Nov 2015 ed that patient had not l	08:00 been eating meals as provided			
2	20 Jan 2016	08:00			
(None Entered)					

Field masking Global Setting on:

Incident ID Clinical review /	Incident date progress notes	Incident time
1 ****	17 Nov 2015	08:00
2	20 Jan 2016	08:00
****		