

SAS

Safety Alert System

File Manager User Guide

This document provides the steps to manage submitted files in the Safety Alert System using the Info Center.

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Steps to Managing a Safety Alert/File

Step	Page	Section	Description
1. Open the File	3	Open a File	
2. Review the File			
3. See who has visibility of the file	4	Who is Alerted	<ul style="list-style-type: none"> To make sure the right people were alerted of the file Be aware of who is working on the file
4. Work on the File	5	Add Follow-up	<ul style="list-style-type: none"> Document any activity or work you did on the file Write Comments, Notes, Findings, Recommendations Acknowledge that you have reviewed the file
5. See others' work, activity, input	5	Follow-up Actions	<ul style="list-style-type: none"> To read others' comments/recommendations To keep track of others' activity on the file
6. Task Someone (Optional)	6	Tasks	<ul style="list-style-type: none"> Request others to review the file, investigate Request others to document their findings, input Make others aware of the situation
7. Complete tasks assigned to you	7	Review & Complete Tasks	<ul style="list-style-type: none"> To let others know you have completed the task assigned to you
8. Sign-Off on the File	8	Sign-Off	<ul style="list-style-type: none"> Means that you acknowledge that all work, tasks, investigation is complete You now want the file to be removed from your Info Center dashboard
9. Send to Director for Close	9	Send to Director	<ul style="list-style-type: none"> You want the Director to know that the file is ready for his/her review and closure

SAS Login

1. Access the SAS website through K-Net by clicking on “SAS” across the top navigation bar
2. Log in using your regular NKC Windows credentials. Username starting with the first two letters of your first and last name.
3. Use the main menu on the left to navigate the SAS website

Northwest Kidney Centers Network

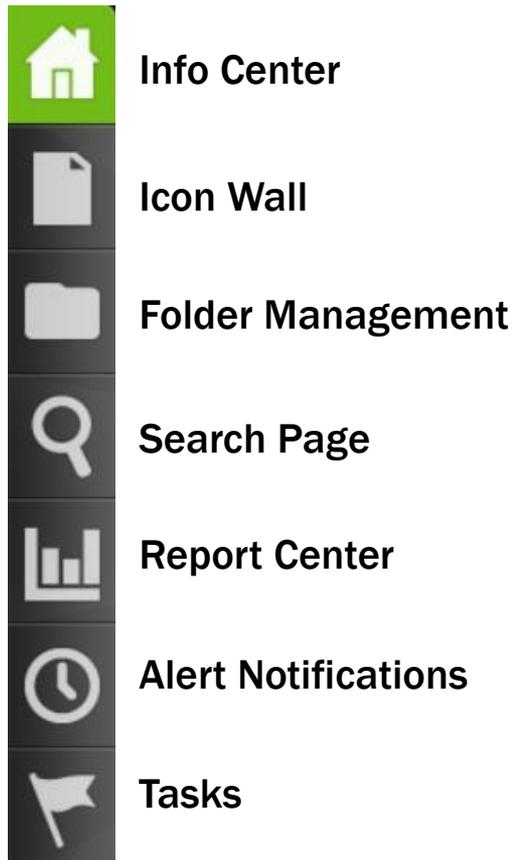
Login

Username:
c19287

Password:
.....

Login

rl solutions™ software for safer healthcare



rl solutions

Logged In as Crystal Lacant

Info Center

My Important Risk Files

Full Screen

<input type="checkbox"/>	File ID	File Name	Person Affected First Name	Person Affected Last Name	Updated Date	File State
No data exists.						

Risk Files Ready for Close (1 to 5 of 5 files)

Full Screen

<input type="checkbox"/>	File ID	File Name	Person Affected First Name	Person Affected Last Name	Updated Date	File State
<input type="checkbox"/>	81	Employee Event (81)	Y	Y	11-22-2016 10:53:56	In-Progress
<input type="checkbox"/>	28	Dialysis/Treatment Event (28)	MINNIE	MOUSE	11-22-2016 10:17:11	In-Progress

Icon Wall

Find a form

Please use the search above to narrow down your event results by using keywords to describe the event that you're looking for.

Adverse Drug Reaction

CPR/Airway Management

Blood Product

Dialysis/Treatment

Open a File

Method 1 From Alert Notification

1. Click the Info Center icon on the Navigation Toolbar.
2. Select the checkbox to the left of the alert name.
3. Click Open.
4. Select the file you'd like to open in the Open Alert Window.

Note: each alert notification is essentially a package with links to one or more files.

Info Center

Alert Notifications (1 to 2 of 2 Alerts)

[Acknowledge](#) | [Snooze](#) | [Open](#) | [Full Screen](#)

<input type="checkbox"/>	Alert Name	Trigger Date ▼	Alert Type	State
<input checked="" type="checkbox"/>	New File(s) Alert	12-03-2012 13:18:19	Watchdog Alert	In-Progress
<input type="checkbox"/>	New File(s) Alert	12-03-2012 13:12:17	Watchdog Alert	In-Progress

< 1 >

Method 2 From Email Notification

1. Open the email notification from your inbox (not shown).
2. Click on any of the links embedded in the message

For your review
no-reply@generalhospital.com
Sent: Mon 12/3/2012 1:12 PM
To: Katie Miller

Please review files linked below.

IMPORTANT ALERT
Katie, you are receiving this Alert because new file

This Notification was generated on 12-03-2012 13:18:19.

Below are the links to the files that triggered this Alert

- [File 85](#) Site: Site 1, Type of Person Affected: Affected
- [File 86](#) Site: Site 1, Type of Person Affected: In-Patient
- [File 87](#) Site: Site 2, Type of Person Affected: In-Patient

Open Alert ? x

Subject: New File(s) Alert

Messages:

IMPORTANT ALERT

Katie, you are receiving this Alert because new file(s) have been added to the system.

This Notification was generated on 12-03-2012 13:18:19.

Below are the links to the files that triggered this Alert.

- [File 88](#)

[More Details](#)

[Acknowledge](#) | [Snooze](#) | [UnSnooze](#) | [Delete](#) | [Exit](#)

Method 3 From Info Center

1. Click the Info Center icon on the Navigation Toolbar.
2. Select the checkbox to the left of the alert name.
3. Click Open.

Note: Instead of Open, you can click the Summary link to view the File Summary.

Info Center

My Files (1 to 5 of 36 files)

[Summary](#) | [Open](#) | [Important](#) | [Not Important](#) | [Full Screen](#) | [Close Files](#) | [Print](#) | [Email](#)

<input type="checkbox"/>	File Name	First Name	Last Name	Updated Date ▼	File State
<input type="checkbox"/>	Safety/Security Event (81)	PETER	KIM	12-06-2012 10:30:20	In-Progress
<input checked="" type="checkbox"/>	Blood Product Event (62)	GIVEN	FAMILY	12-05-2012 14:35:03	In-Progress
<input type="checkbox"/>	Blood Product Event (69)	SARAH	MORGAN	12-05-2012 14:32:09	In-Progress

Who's Alerted?

1. Open the file
2. Click on Alerts on the left hand side, under File Notifications
3. A pop-up will appear that displays who has visibility of the file

Behavior - Management Form - 102

[Add Follow-up](#)

Table of Contents

- Behavior
- When and Where Event Occ...
- Person Affected Details
- Parties Involved / Notified / W...
- Attachments
- ...

File Notifications

- Linked Files (0)
- Alerts (4)**
- Tasks (0)
- Summaries
- Audits
- File Exports

Behavior

This form is not meant to be used for assistance.

Notification Date	Recipient
01-24-2017 14:30:48	Heather Johnson
01-20-2017 17:30:10	Louise Kato
01-20-2017 17:30:09	Cindy Black
01-20-2017 17:30:08	Celia Brown

Showing 4/4
[More Alerts...](#)

Type of Person Affected

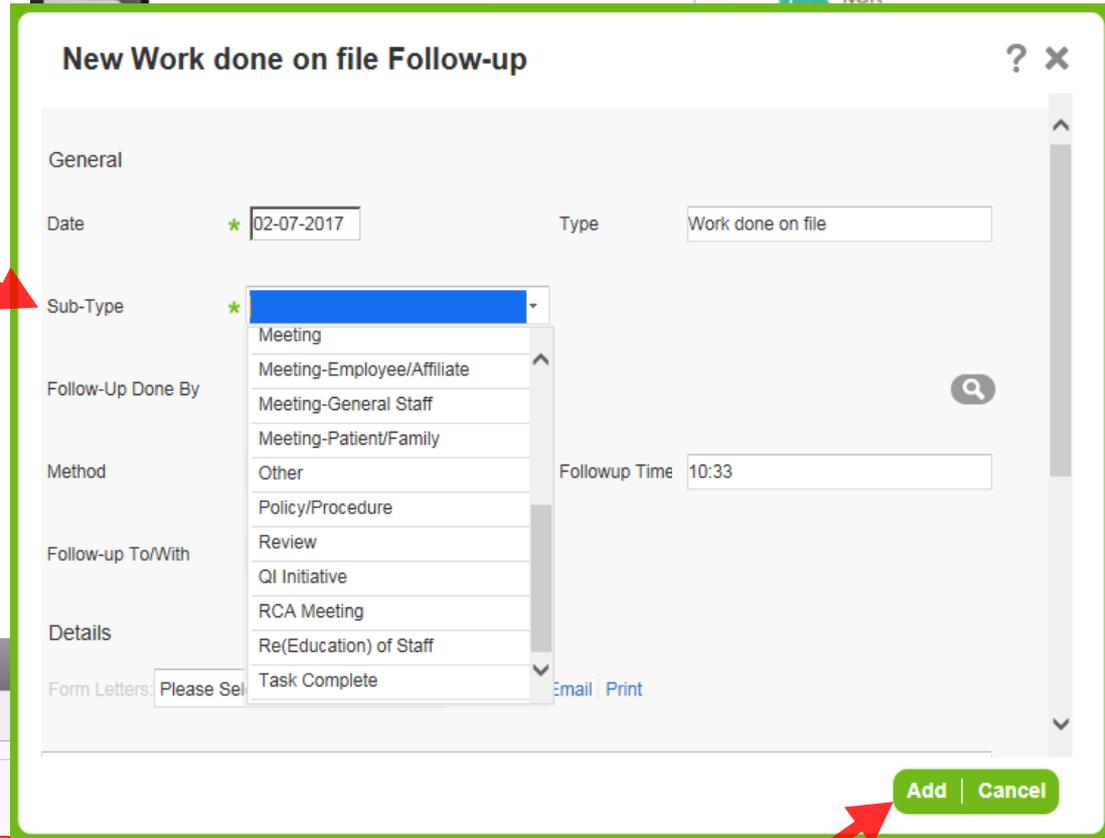
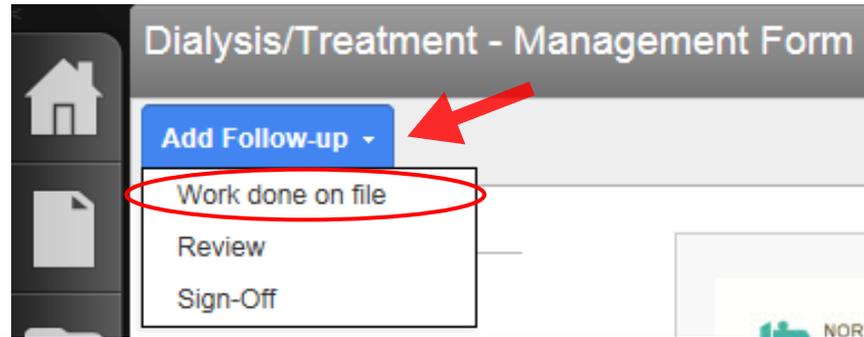
Reported Severity

Add Follow-up

1. Once the file is open, click the Add Follow-up button
2. Select the applicable follow-up type from the list.
3. Fill in as much detail as required.

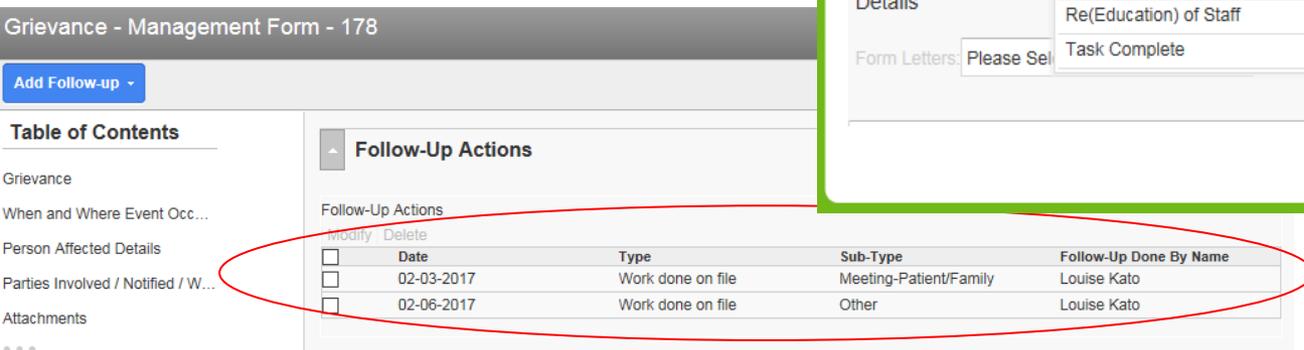
Tips:

- If you just reviewed the file, it is always best to add the **Review** follow-up type so it can be tracked on the file.
- All follow-up actions will appear on the file in the Follow-up Actions section which only management has access to.



Locate Follow-up Actions

1. Hover over the last section name in the Table of Contents to expand the view
2. Click on Follow-up Actions



Assign Tasks

1. In the management form, click on **Tasks** in the File Notifications panel on the left.
2. Click **Create Tasks**
3. At a minimum, fill in the mandatory fields.
4. Search for and select the name of the manager you'd like to assign the task to.
5. Click OK when done. **Note:** alternatively, you can click on OK and Copy, if you wish to use the content to create another task with similar details.
6. Click Close.

Dialysis/Treatment - Management Form - 175

[Add Follow-up](#)

Table of Contents

- Dialysis/Treatment
- When and Where Event Occ...
- Person Affected Details
- Parties Involved / Notified / W...
- Attachments
- ...

File Notifications

- Linked Files (0)
- Alerts (2)
- Tasks (0)
- Summaries
- Audits

Task For File 175 - My Incomplete Tasks
No Tasks

Showing 0/0
[Create Task](#) | [More Tasks...](#)

Add/Modify Task ? x

Module * Risk File ID * 74

Type * Review File Deadline *

Priority Normal Re-Assign To * det|

Description Please review this file and provide recommendations

Reminder Date Email Notifications?

% Completed Send Emails to Assignee and Creator

Debra M Marcella (dm8243@...)
Title: Clinical Director
Dept: Unspecified
Status: Active

OK | Open File | Cancel

Review & Complete Tasks

1. Click on the Tasks to open your tasks list.
2. Select My Incomplete Tasks from the dropdown
3. Select the checkbox of the task
4. Click Complete from the Action Links
5. Click Close

The screenshot displays the 'Tasks' interface in the r1 solutions application. The sidebar on the left contains several navigation icons: a home icon, a document icon (highlighted with a red arrow), a folder icon, a search icon, a bar chart icon, a clock icon, and a green flag icon (circled in red). The main content area is titled 'Tasks' and features a header with action links: 'Add', 'Open', 'Delete', 'Complete', and a dropdown menu currently set to 'My Incomplete Tasks' (highlighted with a red arrow). Below the header is a table with the following data:

<input type="checkbox"/>	Assigned To	Created By	Task Type
<input checked="" type="checkbox"/>	Theresa Tofflemire	Debra M Marcella	Check File Status
<input type="checkbox"/>	Theresa Tofflemire	Debra M Marcella	Check File Status
<input type="checkbox"/>	Theresa Tofflemire	Debra M Marcella	Follow-up with Staff
<input type="checkbox"/>	Theresa Tofflemire	Debra M Marcella	Follow-up on File
<input type="checkbox"/>	Theresa Tofflemire	Louise Kato	Follow-up on File
<input type="checkbox"/>	Theresa Tofflemire	Celia Brown	Check File Status

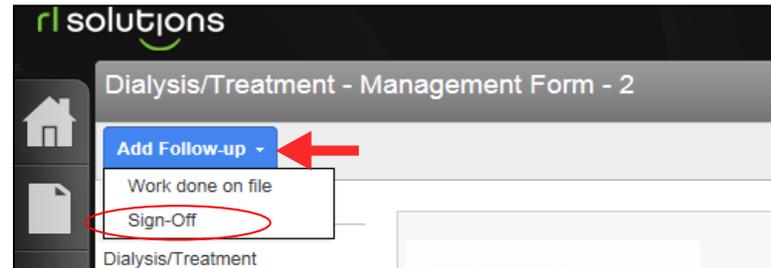
Manager Sign-Off

Sign off on the file once you have completed your work on the file.

NOTE: Once a manager/user has signed off on the file, it will be removed from your Info Center dashboard. You may still view the file through the Search page. The file will still be visible on the Director's info center until the Director closes the file.

1. Click on Add Follow-up
2. Select "Sign-Off" from the drop down menu. A pop-up window for New Sign-Off Follow-up will appear.
3. Under the Sub-Type drop down, select the Sign-Off option that best describes your role. Complete other fields as needed.
4. Click Add at the bottom of the pop-up window.

A new entry for Sign-Off will automatically be added under the Follow-Up Actions section of the form



New Sign-Off Follow-up

General

Date * 02-07-2017 Type Sign-Off

Sub-Type *
 Manager Sign-off
 Social Worker Sign-off
 HR Sign-Off
 Facilities Systems Sign-Off
 Plant Operations Sign-Off
 Security Sign-Off

Follow-Up Done By

Method Followup Time 09:32

Follow-up To/With

Details

Form Letters: Please Select [Populate](#) [Email](#) [Print](#)

Add | Cancel

Dialysis/Treatment - Management Form - 19

Table of Contents

Follow-Up Actions

Date	Type	Sub-Type
01-16-2017	Work done on file	Review
01-17-2017	Work done on file	Consultation
01-17-2017	Sign-Off	Manager Sign-off

Send File to Director for Close

To notify the Director or final authority that all work on the file is complete and is ready for his/her review and closure.

1. Locate to the **Resolutions and Outcomes** section at the end of the Management Form.
2. Click the check box next to “File ready to go to Director for close?”
3. Click Save & Exit

A notification will be sent to the Director that the file is ready for his review and closure

The screenshot shows the 'ri solutions' interface for a 'Dialysis/Treatment - Management Form - 174'. The left sidebar contains navigation icons for Home, Documents, Folders, Search, Analytics, and Clock. The main content area is divided into sections: 'Table of Contents' (listing Dialysis/Treatment, When and Where Event Occ..., Person Affected Details, Parties Involved / Notified / W..., Attachments, and File Notifications), 'File Notifications' (showing Linked Files (0)), and 'Resolution and Outcomes' (highlighted with a red oval). The 'Resolution and Outcomes' section includes a heading 'Resolutions and outcomes of the event' and a form with the following fields: 'File ready to go to Director for Follow-Up and Close' (with a checked checkbox and a red arrow pointing to it), 'Severity Level (Actual)' (with a dropdown menu showing 'Not Specified' and an 'Add/Modify' link), and 'Outcome Actions Taken' (with an 'Add/Modify' link).

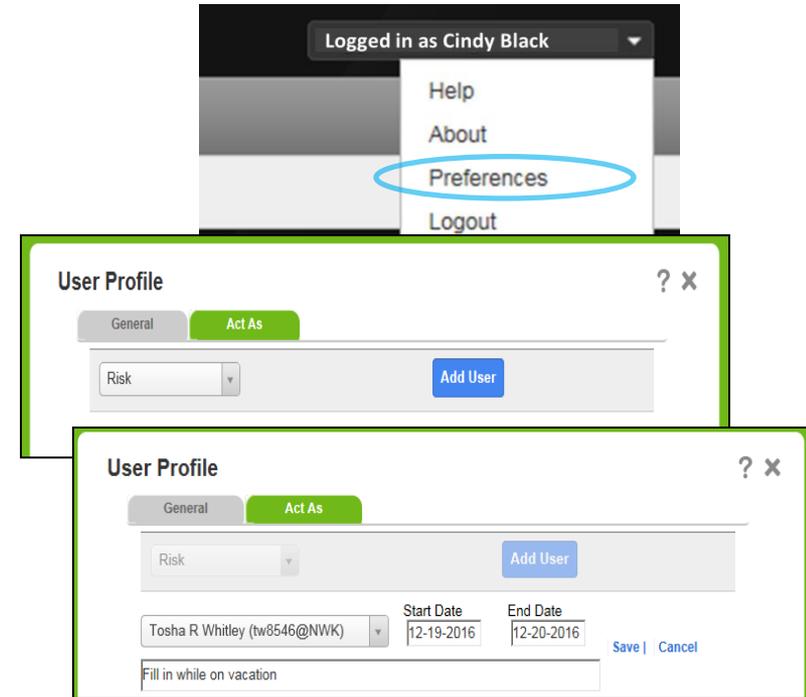
Act As

Use the Act As feature to temporarily assign someone to fill your role and act as you in the SAS

Steps for the Actual Manager

1. Click on your Name on the upper right hand corner
2. Click on Preferences. A pop-up window will appear called "User Profile"
3. Click on the tab Act As
4. Select "Risk" from the dropdown and click "Add User"
5. In the Type Username box, start typing the name of the person you want to fill your role in the SAS
6. Select a Start and End Date
7. Add a brief description in the text field below
8. Click Save

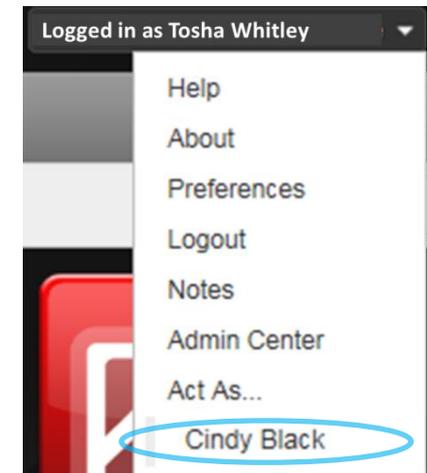
The person you assigned will now be able to act as you during the dates you indicated for Start – End Date. He or She will see the following option when they log in the SAS



Steps for the user acting as the Actual Manager

1. Click on your Name on the upper right hand corner
2. In the drop down, you will see "Act As..." at the bottom and the name of the Actual Manager listed below
3. Click on the Actual Manager's name and the system view will change as though you were the Actual Manager. This will be indicated on the upper right hand corner

Logged in as Tosha Whitley acting as Cindy Black

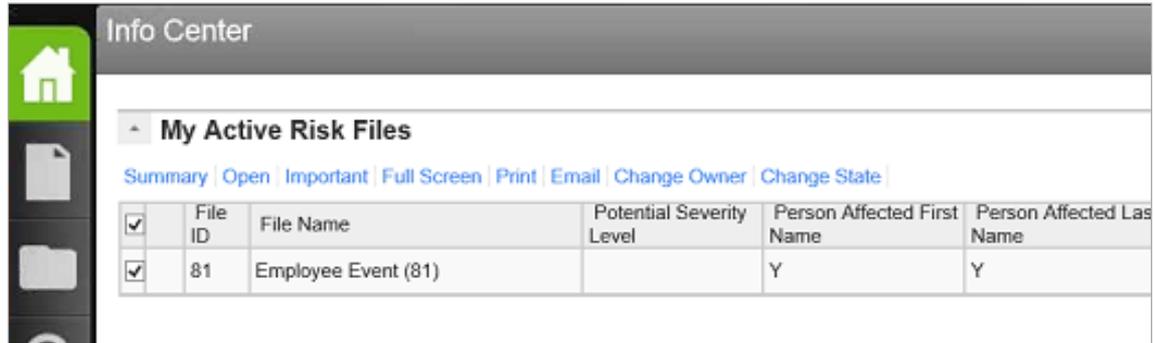


Mark File as Important

Method 1 From the Info Center

1. In the File Browse widget (caption may differ), select the checkbox of the file
2. Click Important from the Action Links at the top

Note: Files marked as important will appear with a symbol  next to the name



Info Center

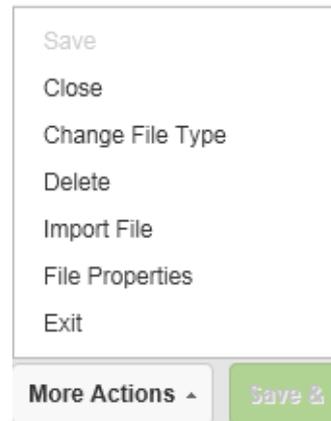
My Active Risk Files

Summary | Open | Important | Full Screen | Print | Email | Change Owner | Change State

<input checked="" type="checkbox"/>	File ID	File Name	Potential Severity Level	Person Affected First Name	Person Affected Last Name
<input checked="" type="checkbox"/>	81	Employee Event (81)		Y	Y

Method 2 While in the Management Form

1. Click the More Actions button at the bottom of form.
2. Select File Properties.
3. In the File Properties window, select the Status/Ownership tab.
4. Under My Important Files, select the checkbox to mark file as important.
5. Click Save.
6. Click Save & Exit on the form (not shown).



Save

Close

Change File Type

Delete

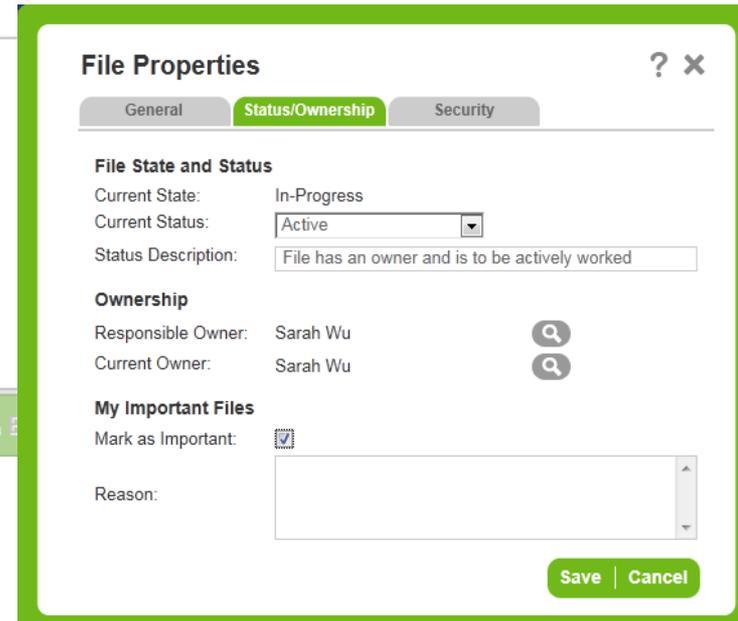
Import File

File Properties

Exit

More Actions ▾

Save & Exit



File Properties ? X

General | **Status/Ownership** | Security

File State and Status

Current State: In-Progress

Current Status:

Status Description:

Ownership

Responsible Owner: Sarah Wu 

Current Owner: Sarah Wu 

My Important Files

Mark as Important:

Reason:

Save | Cancel

Close a File

There are 2 primary methods to close files. For the first method, follow steps 1-2 on page 5, clicking on Close Files action link instead.

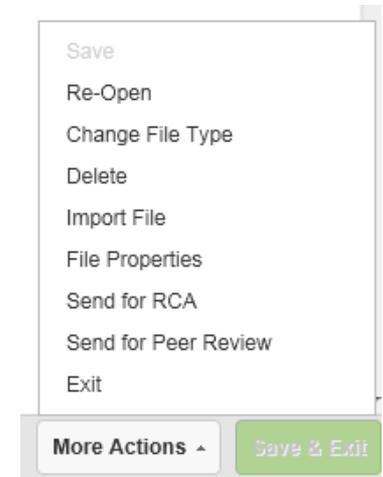
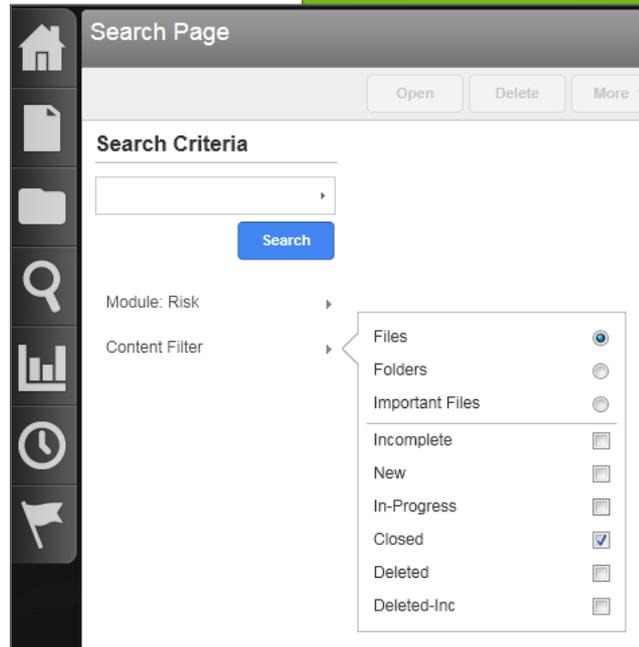
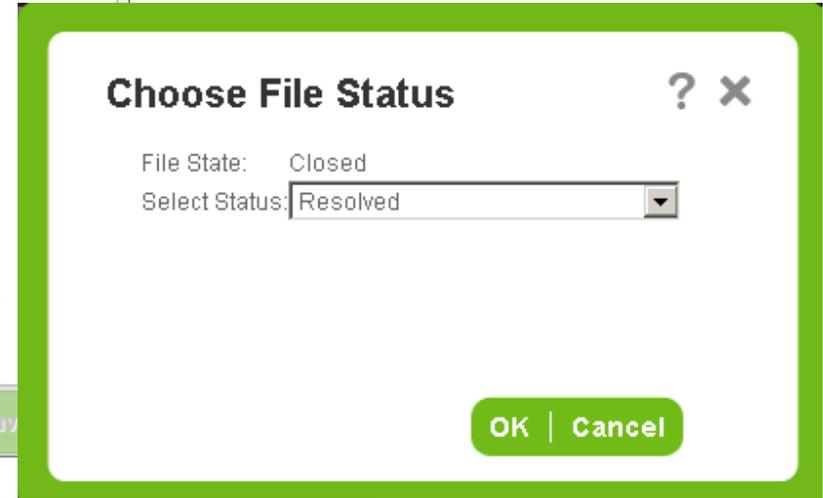
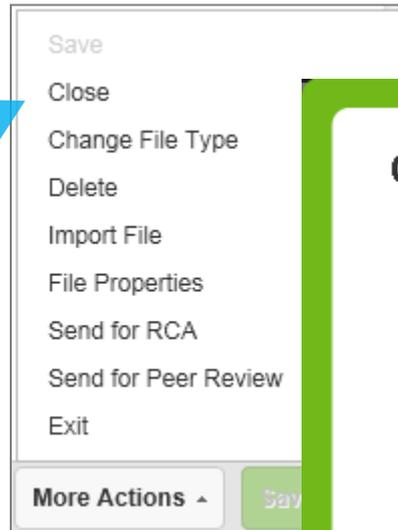
Method 2: Procedure

1. Click the More Actions button at the bottom of the form
2. Select Close from the list.
3. Select the appropriate status.
4. Click OK.

Re-open Closed Files

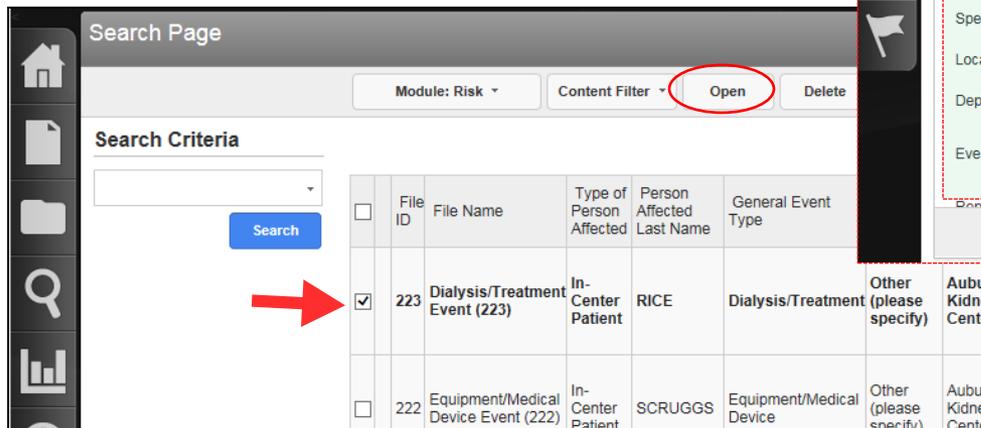
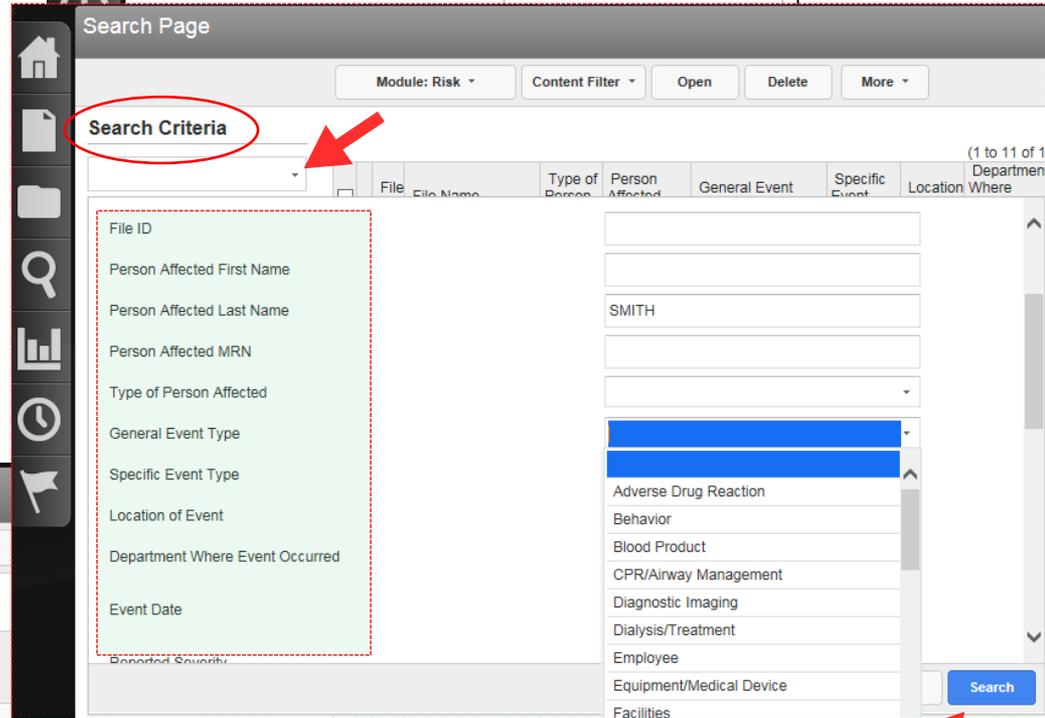
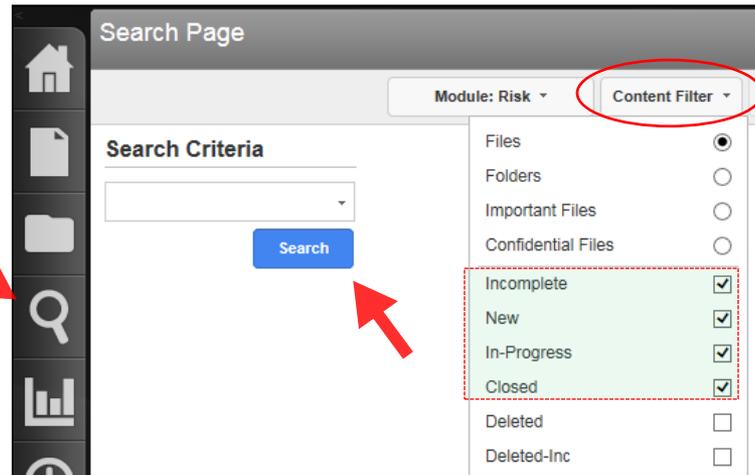
Procedure

1. Click the Search icon from the Navigation Toolbar.
2. Click Content Filter
3. From the pop-up, ensure that only the Closed option is checked off
4. Click Search
5. From the results options, select the checkbox of the desired file.
6. Click Open.
7. Click More Actions
8. Select Re-Open from the list.
9. Follow prompts (not shown)
10. Click Save & Exit



Search for a File(s)

1. Go to the Search Page by clicking on the magnifying glass icon on the left navigation pane
2. Filter your search by clicking on Content Filter at the top.
3. Select the type of file statuses you want to see
4. Click Search
5. You can narrow your search further by clicking on the Search Criteria drop down arrow
6. Specific your search by filling in one or more of the fields
7. Click on Search at the bottom of the window and a list of the files within your search parameters will appear
8. To open a file, select the box to the left of the file and click Open at the top



Print a File Summary

1. Open the file you wish to print
2. Click on Summaries on the left hand side under the File Notifications section
3. Select the type of summary you wish to print. A new tab on your browser will appear with the file summary
 - **Original Summary:** Summary of file as originally entered by submitter
 - **Current Summary:** Current summary of the entire file; includes all work done on the file
 - **Follow-up Summary:** Summary of the Follow-up actions only
 - **Task Summary:** Summary of the Tasks on the file only
4. On your browser, under File, select Print and proceed with your desired printing settings

Dialysis/Treatment - Management Form - 54

Add Follow-up ▾

Table of Contents

- Dialysis/Treatment
- When and Where Event Occ...
- Parties Involved / Notified / W...
- Attachments
- Follow-Up Actions
- ...

File Notifications

- Linked Files (0) ▸
- Alerts (8) ▸
- Tasks (0) ▸
- Summaries** ▸
- Audits
- File Exports

Original Summary

Current Summary

Followup Summary

Task Summary

Dialysis/Treatment

General information about the dialysis/treatm

Specific Event Type * Water - T

Type of Person Affected * Person N

Note: If a new tab does not appear at step #3, check your browser's cookies/pop-up settings. You may have to allow cookies/pop-ups for this site in order for the summary tab to appear.

File Edit View Favorites Tools Help

- New tab Ctrl+T
- Duplicate tab Ctrl+K
- New window Ctrl+N
- New session
- Open... Ctrl+O
- Edit
- Save
- Save as... Ctrl+S
- Close tab Ctrl+W
- Page setup...
- Print... Ctrl+P**
- Print preview...
- Send ▸
- Import and export...
- Properties
- Exit

Current Summary

Dialysis/Treatment Event (54) - 02-13-2017

File State: In-Progress
Owner:

NORTHWEST
Kidney Centers

Current Summary

Dialysis/Treatment Event (54) - 02-13-2017

File State: In-Progress
Owner: [Redacted] Entered Date: 02-13-2017

Dialysis/Treatment

GENERAL INFORMATION ABOUT THE DIALYSIS/TREATMENT EVENT

Specific Event Type	Water - Testing Issue
Type of Person Affected	Person Not Applicable
Reported Severity	B. Event Results in No Harm
Injury Incurred?	No
Equipment Involved/Malfunctioned?	No
Brief Factual Description	[Redacted]
Immediate Actions (Reported)	• No Action

When and Where Event Occurred

WHEN AND WHERE THE EVENT OCCURRED

Event Date	[Redacted]
Time (use military time i.e. 00:00)	[Redacted]
Location of Event	Elliott Bay Kidney Center
Department Where Event Occurred	Center Dialysis
Specific Location	Water Treatment Room

Help Menu

Finally- a smart Help Menu! Unlike other programs that make you look for the right instructions, this Help Menu will automatically take you to the section based on what screen you are on the SAS. Try it.

Logged in as Tosha Whitley

- Help
- About
- Preferences
- Logout
- Notes
- Admin Center
- Act As...
- Cindy Black

Home > [Submitting and Managing Files](#) > Understanding the Icon Wall

Understanding the Icon Wall

The Icon Wall contains links to the submission forms used to create new *files*. An *administrator* configures the arrangement of the icons on this page and the forms they access. The administrator

Home > [Submitting and Managing Files](#) > [Submitting a File](#) > Submitting a

Submitting a File

In order to submit a file, you must complete all required fields. There are a variety of field types, Submission Form Panel items and buttons available on the submission form. See the following topics for details about specific features.

Home > [Understanding RL6 Basics](#) > Understanding the Info Center

Understanding the Info Center

The Info Center contains a collection of *widgets* (as defined by your RL6 *administrator*). This page is like a dashboard, bringing you important information that helps you do your job. The page is split into two scrollable columns that show search results, *files*, *tasks* and alerts in the largest column on the left; in the small column on the right, links to reports, websites and your hospital's logo may display.

- Home Icon** – click this icon to return to the Info Center at anytime.
- Main Widgets** – widgets that show relevant files, tasks or alerts. You can view summaries or open files directly from these widgets ([Working with Widgets](#)).
 - Select** – radio buttons allow you to choose a file or record for viewing or performing an action.
 - Action Links** – used to work with a selected record or jump to a page.

File Name	First Name	Last Name	Department	Upd
Diagnostic Imaging Event (5)		SMITH	Triage 1	11-16
Adverse Drug Reaction Event (30)		JONES	Pediatrics	11-16
Adverse Drug Reaction Event (46)		BAILEY	Pediatrics	11-16
Adverse Drug Reaction Event (29)		BRADY	4E North	11-16
Adverse Drug Reaction Event (42)		CHOWDHURY	Triage 1	11-16