NORTHWEST Kidney Centers

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.

Last Update: 2/13/2017

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6	**Assign Tasks** *To request other users to do a task related to the file*
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Steps to Managing a Safety Alert/File

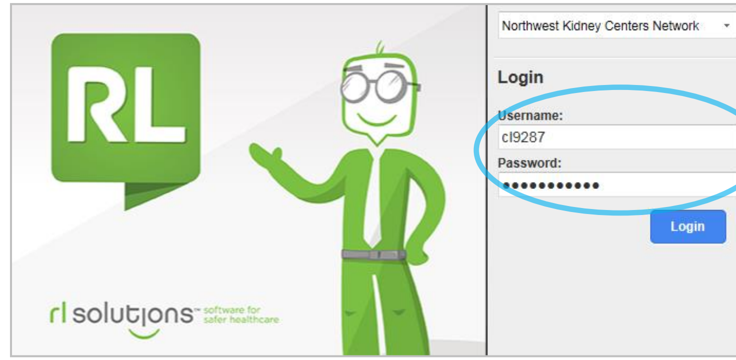
Step	Page	Section	Description
1. Open the File	3	Open a File	
2. Review the File			
3. See who has visibility of the file	4	Who is Alerted	• To make sure the right people were alerted of the file • Be aware of who is working on the file
4. Work on the File	5	Add Follow-up	• Document any activity or work 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	• To read others' comments/recommendations • To keep track of others' activity on the file
6. Task Someone (Optional)	6	Tasks	• 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	• To let others know you have completed the task assigned to you
8. Sign-Off on the File	8	Sign-Off	• 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	• 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



Info Center

Icon Wall

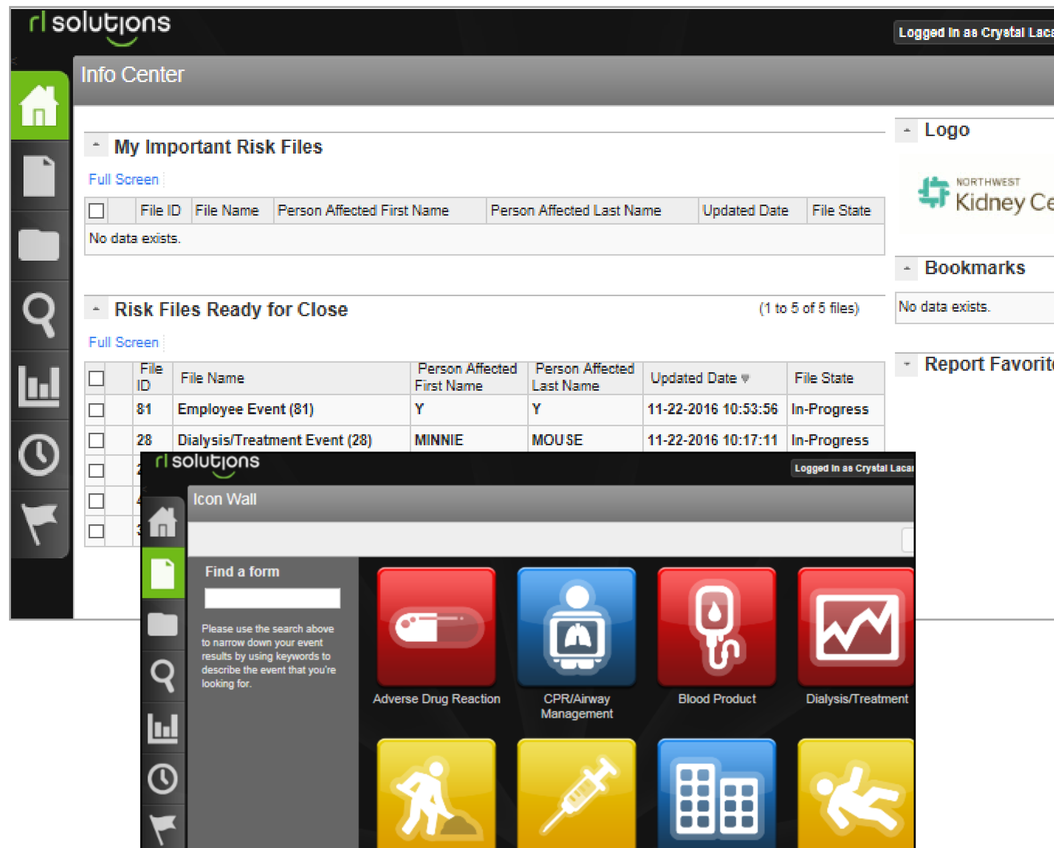
Folder Management

Search Page

Report Center

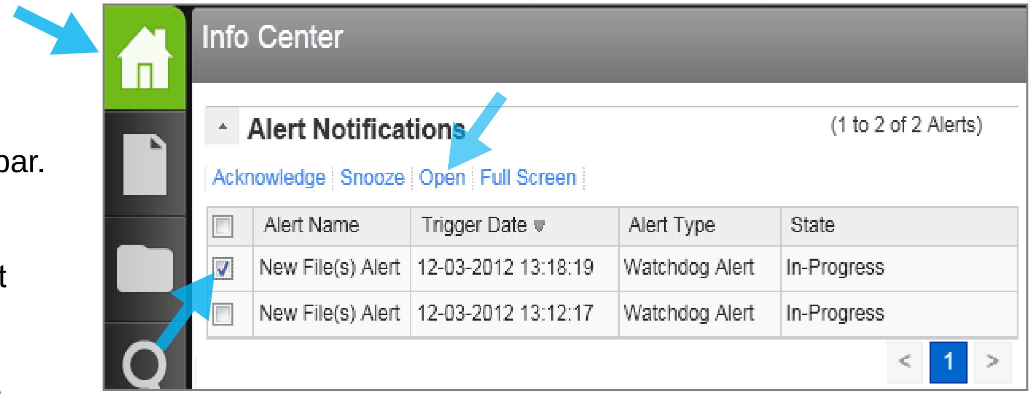
Alert Notifications

Tasks



Open a File

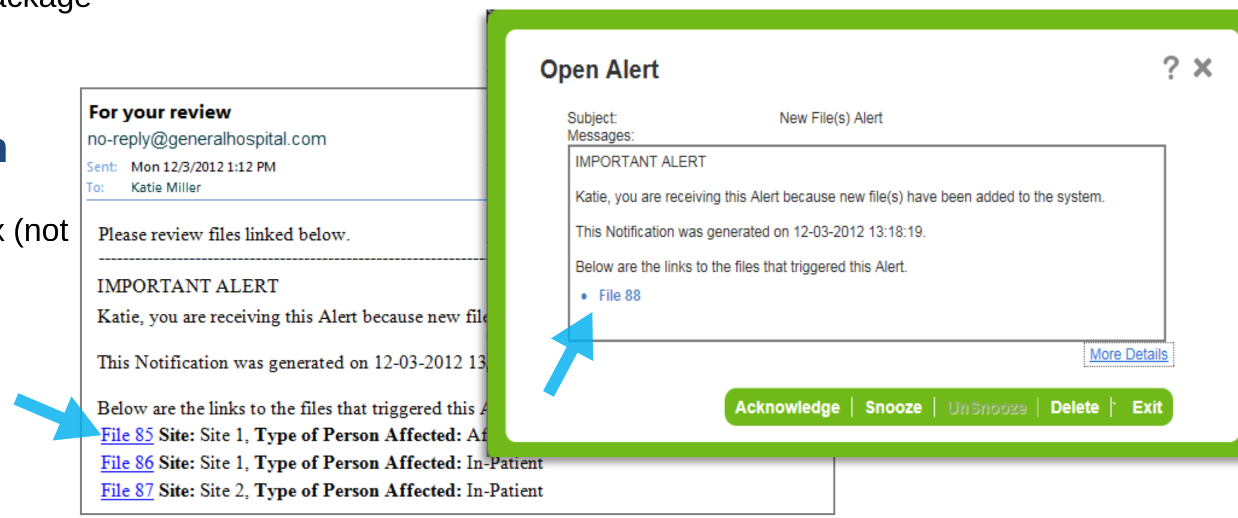
Method 1 From Alert Notification



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.

Method 2 From Email Notification

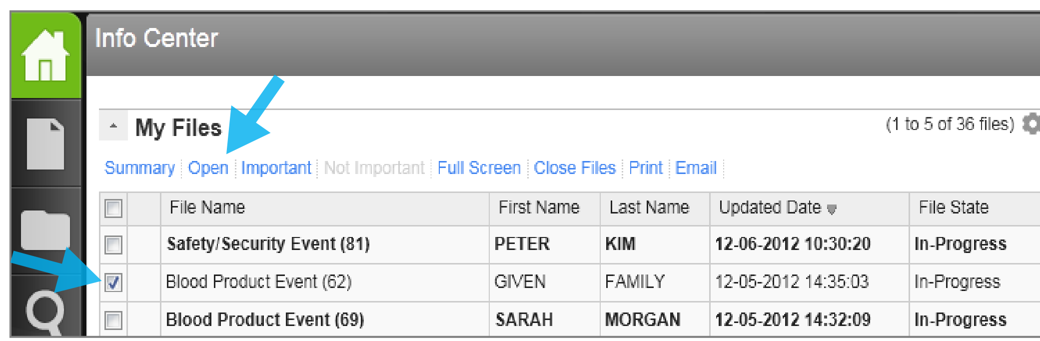


1. Open the email notification from your inbox (not shown).
2. Click on any of the links embedded in the message

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.

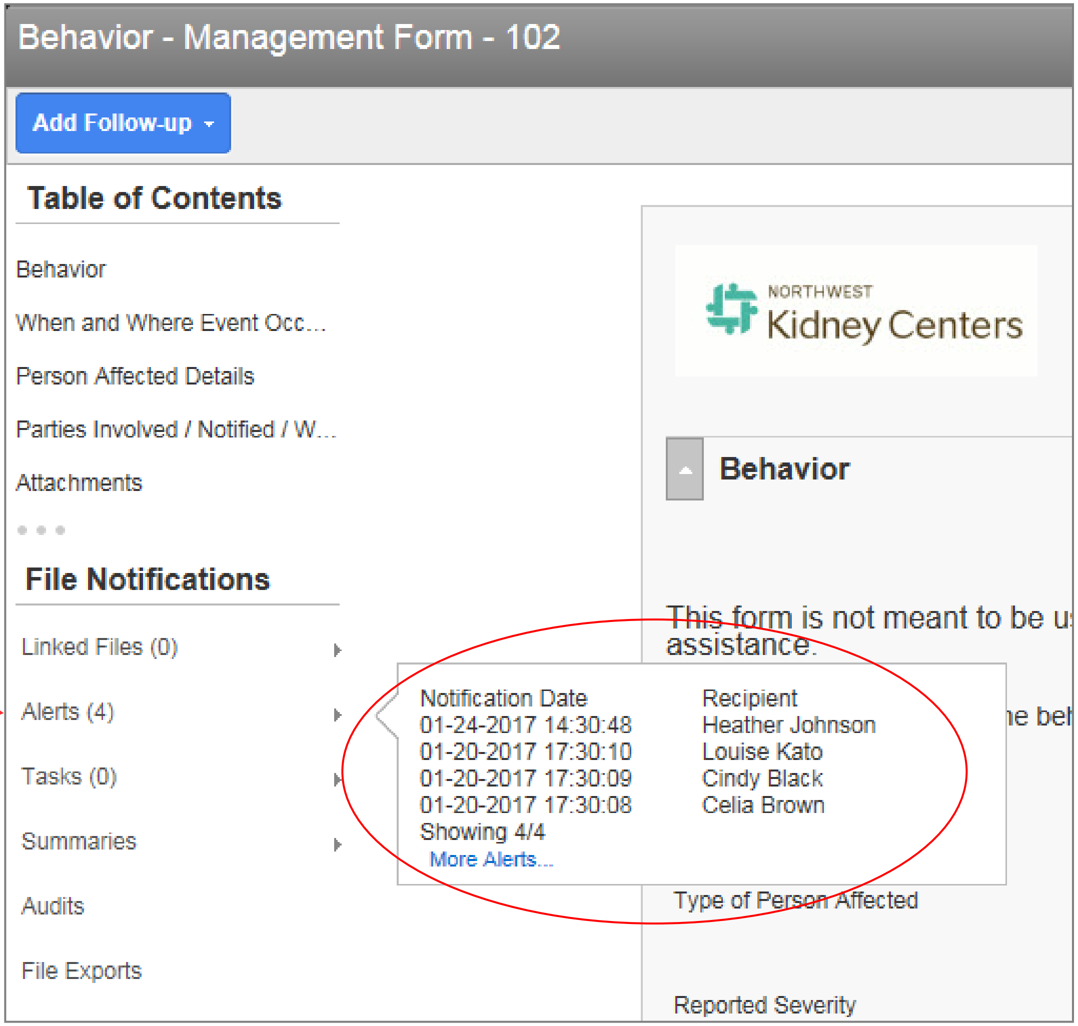


Who's Alerted?

1. Open the file

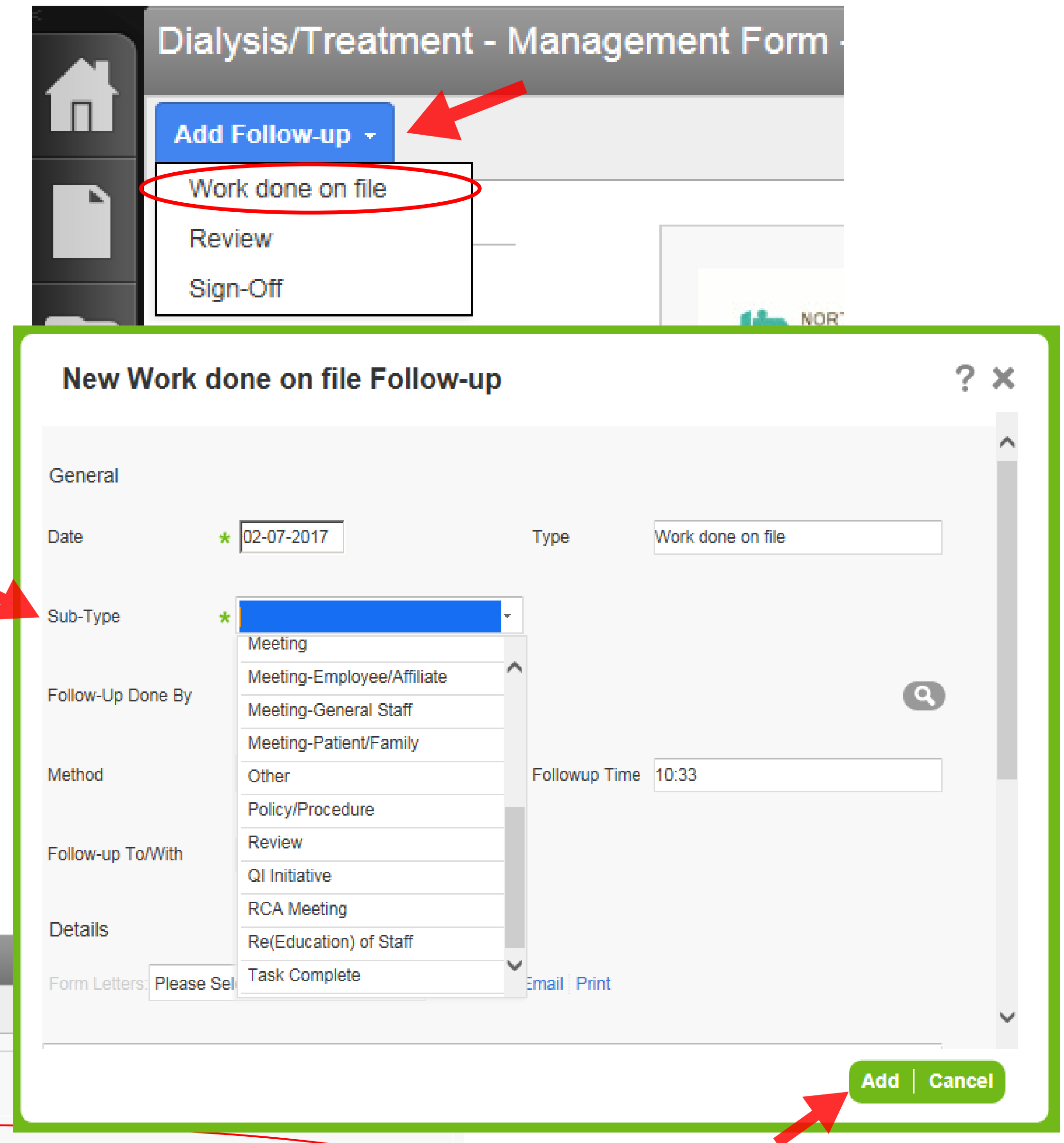
2. Click on <u>Alerts</u> on the left hand side, under File Notifications

3. A pop-up will appear that displays who has visibility of the file



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.

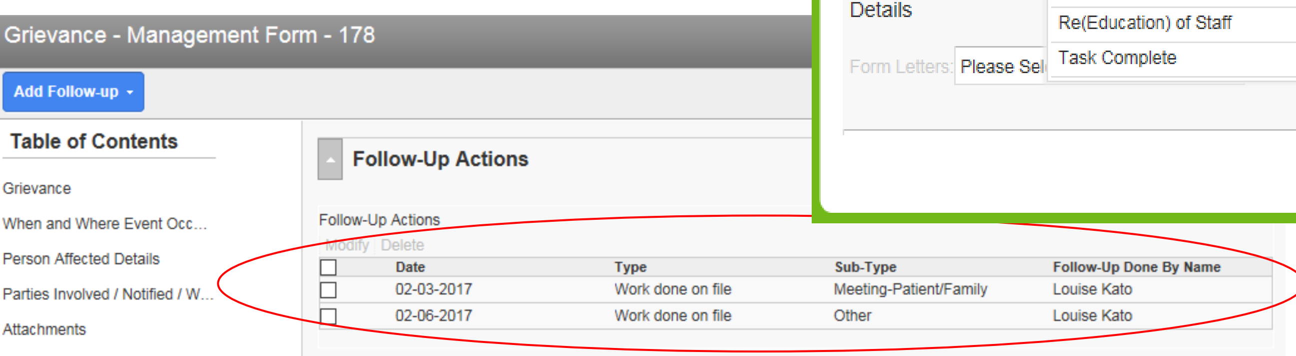


Tips:

- 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.

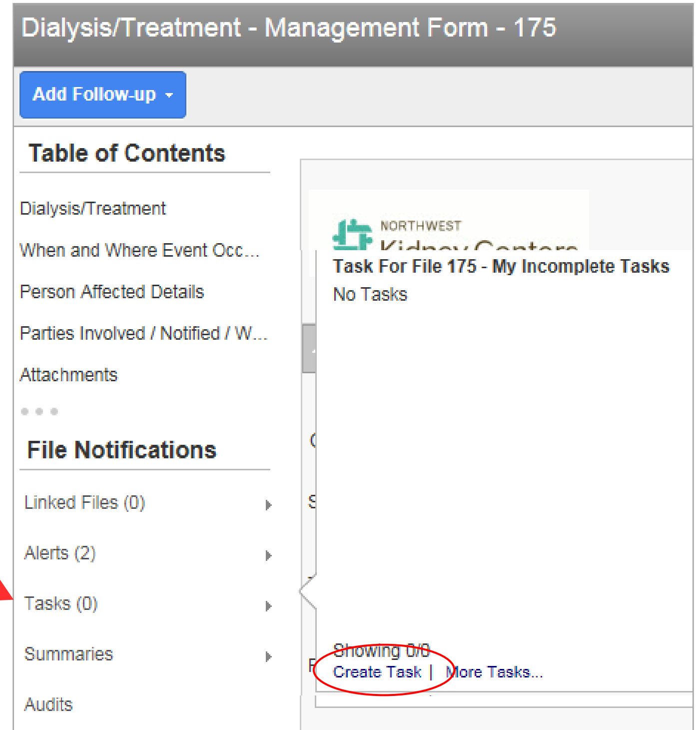
Locate Follow-up Actions

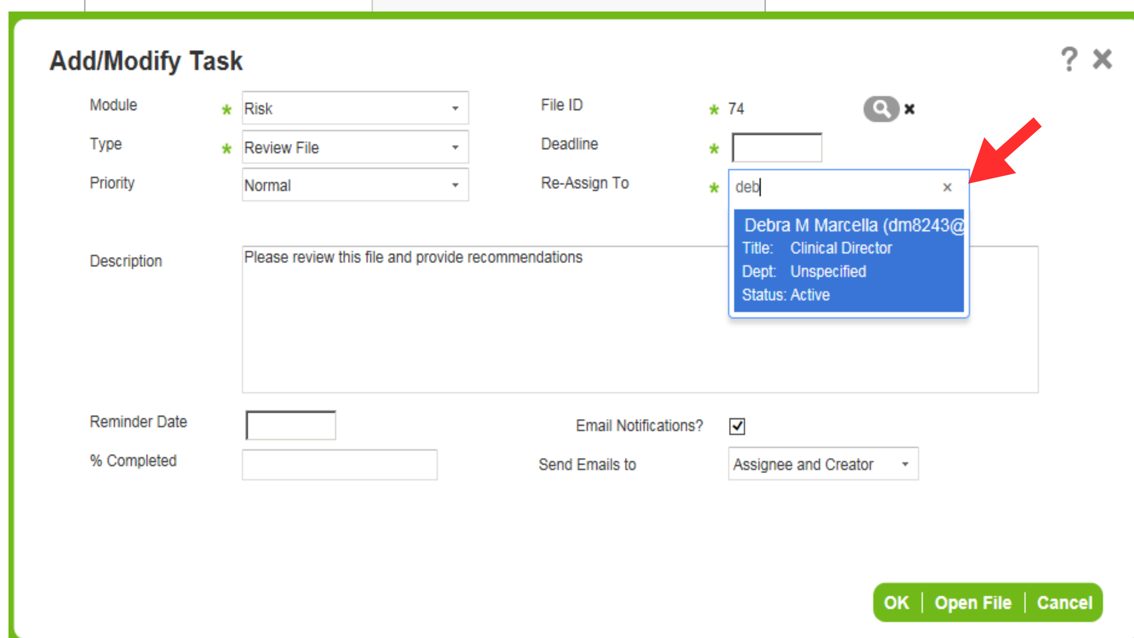
1. Hover over the last section name in the Table of Contents to expand the view
2. Click on Follow-up Actions



Assign Tasks

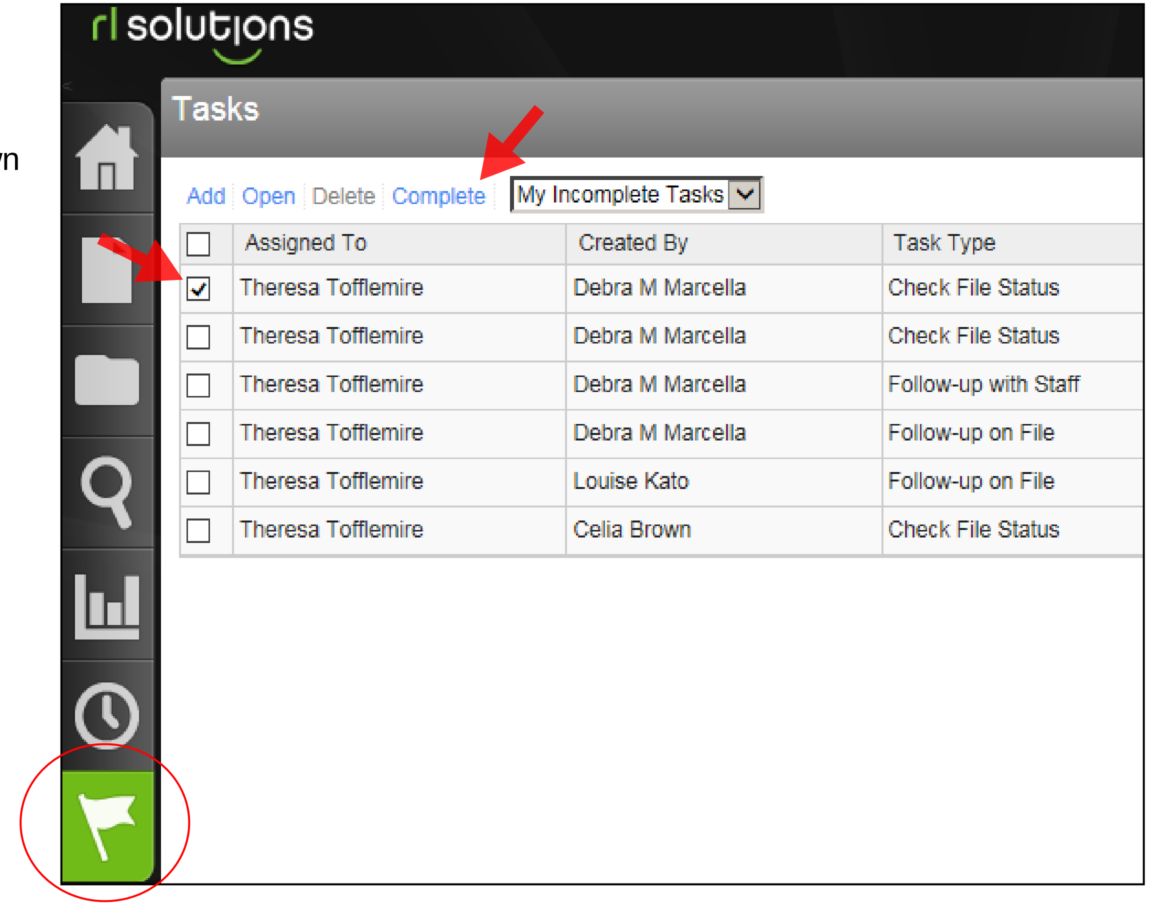
1. In the management form, click on **Tasks** in the File Notifications panel on the left.
2. Click **Create Tasks**
3. At a minimum, fill in the mandatory fields.
4. Search for and select the name of the manager you'd like to assign the task to.
5. Click OK when done. **Note:** alternatively, you can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





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



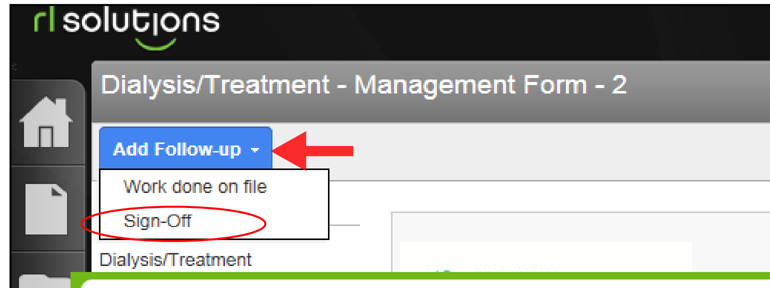
Manager Sign-Off

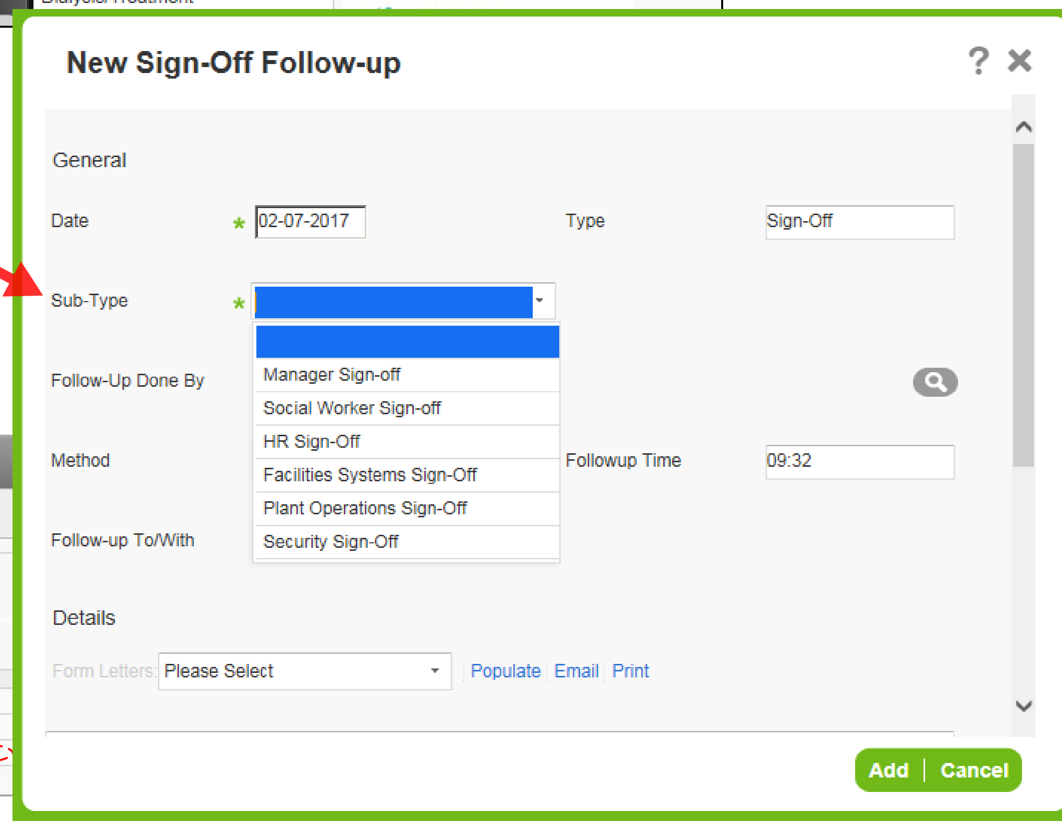
Sign off on the file once you have completed your work on the file.

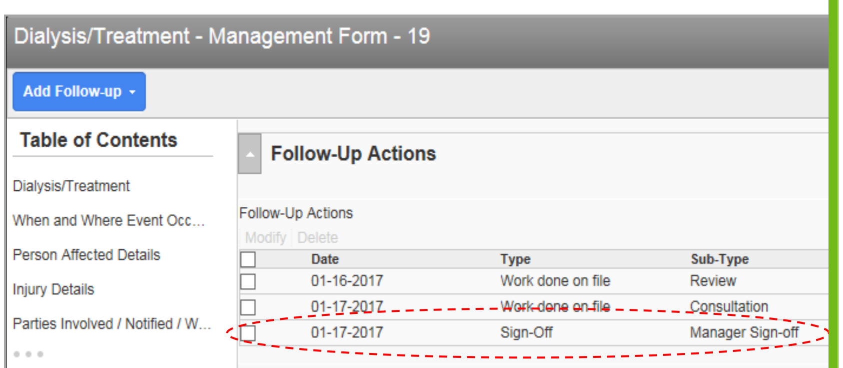
NOTE: Once a manager/user has signed off on the file, it will be removed from your Info Center dashboard. You may still view the file through the Search page. The file will still be visible on the Director's info center until the Director closes the file.

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







Send File to Director for Close

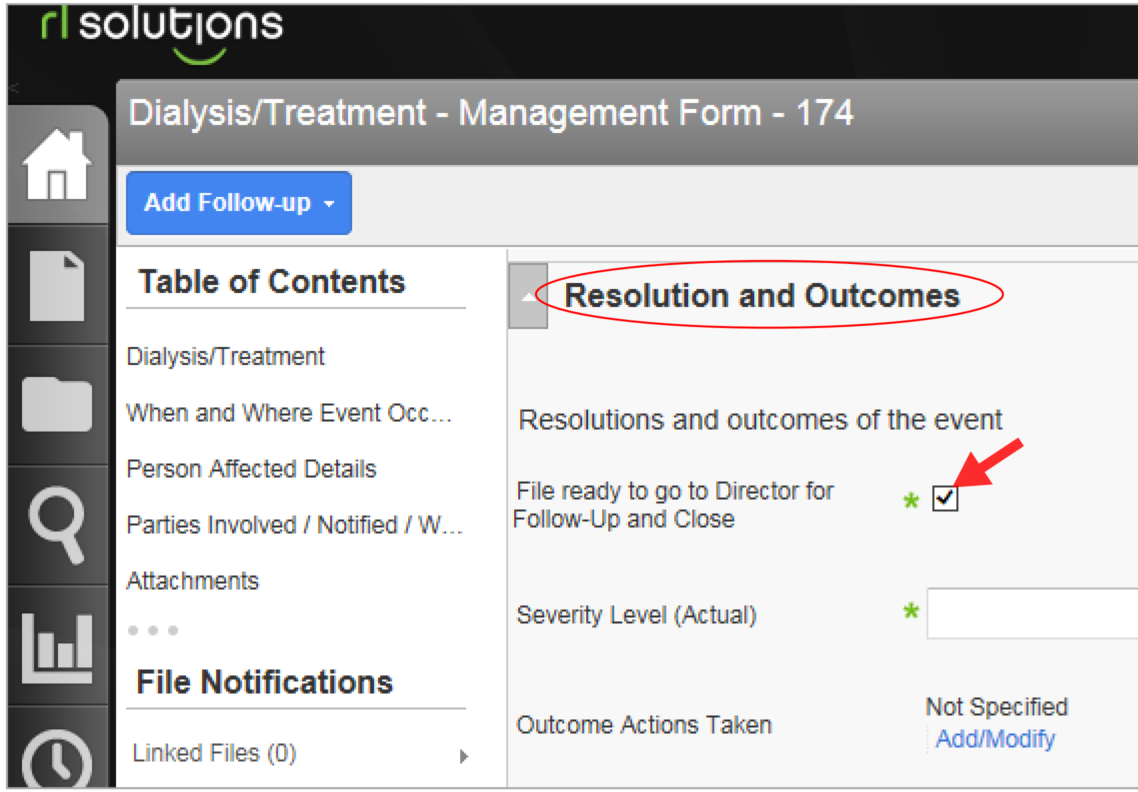
To notify the Director or final authority that all work on the file is complete and is ready for his/her review and closure.

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?"

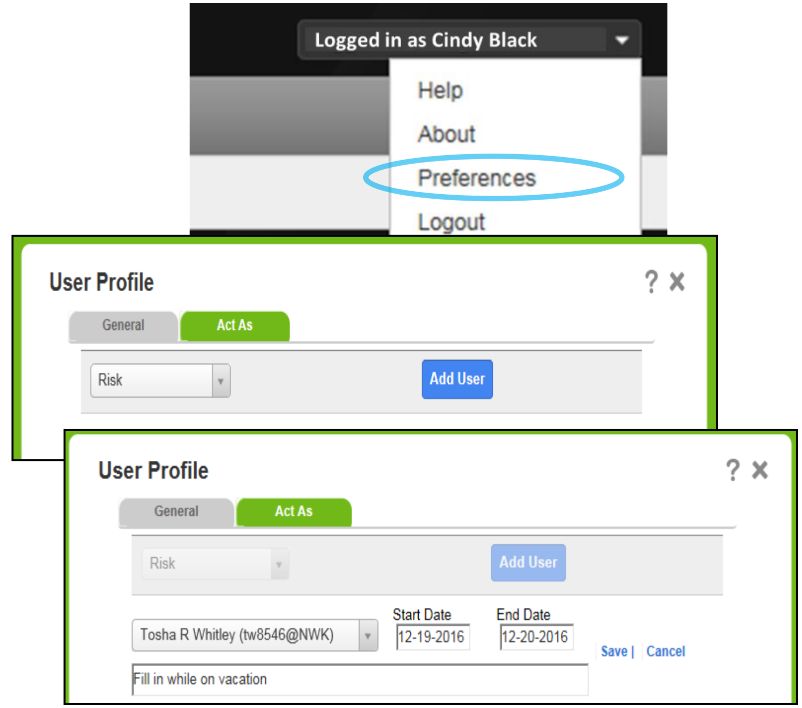
3. Click Save & Exit

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



Act As

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

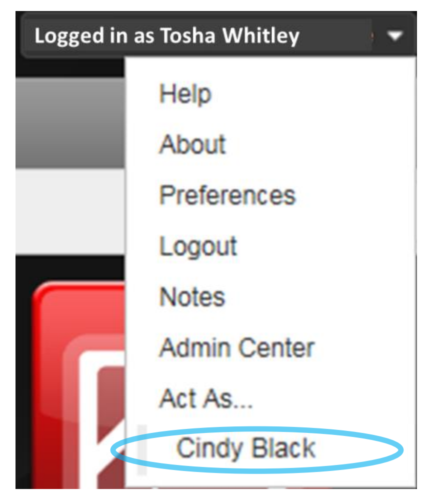


Steps for the Actual Manager

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 indicted 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



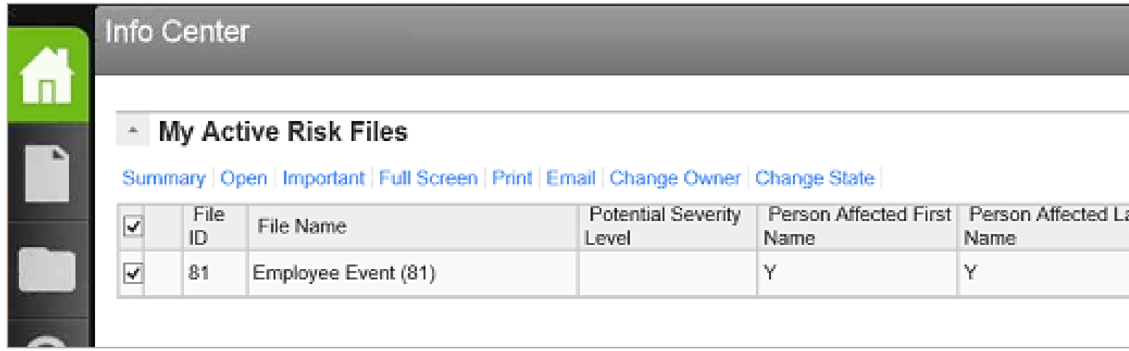
1. Click on your Name on the upper right hand corner
2. In the drop down, you will see “Act As…” at the bottom and the name of the Actual Manager listed below
3. Click on the Actual Manager’s name and the system view will change as though you were the Actual Manager. This will be indicated on the upper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

Mark File as Important

Method 1 From the Info Center

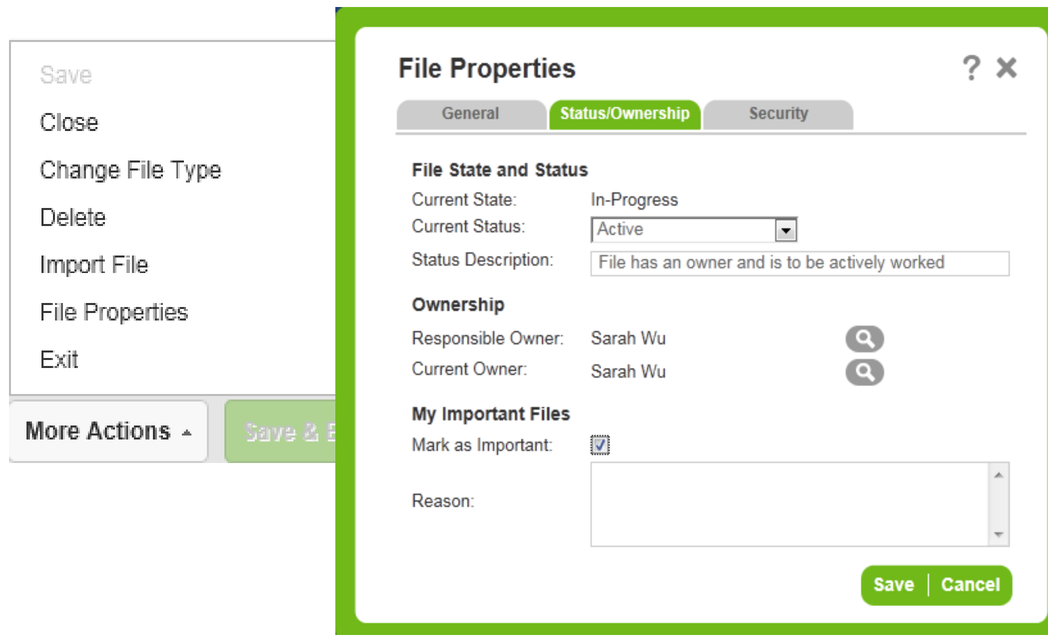
1. In the File Browse widget (caption may differ), select the checkbox of the file
2. Click Important from the Action Links at the top

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



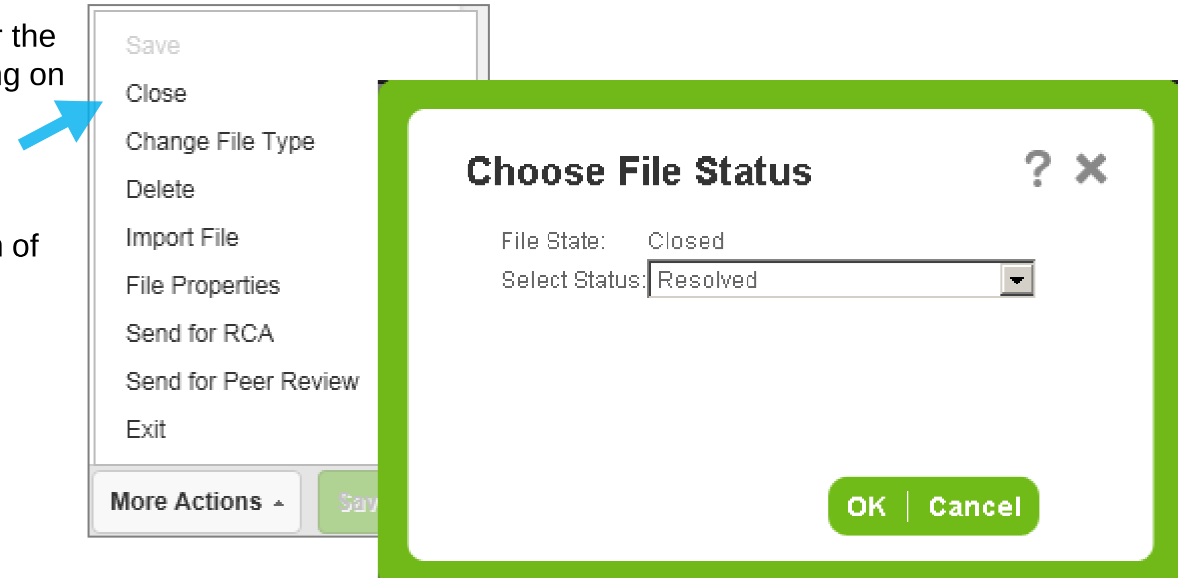
Method 2 While in the Management Form

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).



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.



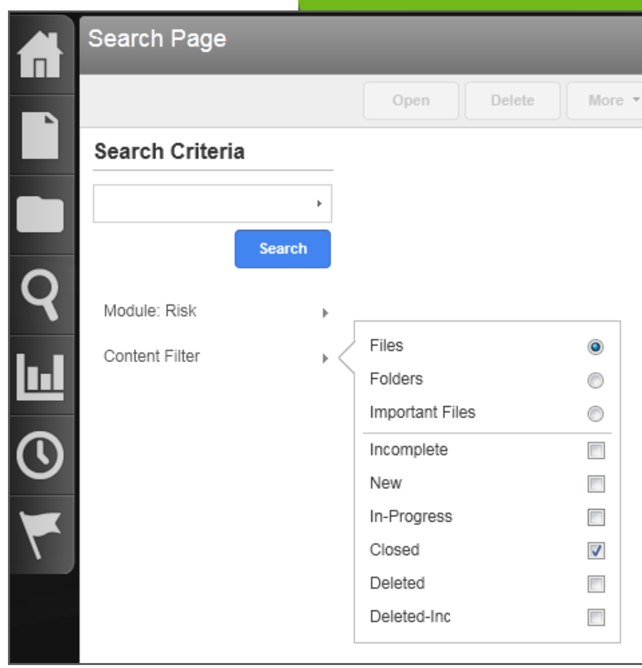
Method 2: Procedure

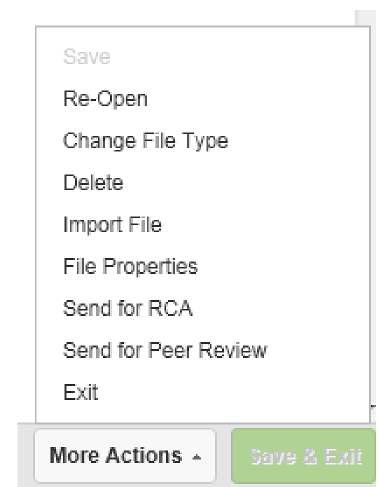
1. Click the More Actions button at the bottom of the form
2. Select Close from the list.
3. Select the appropriate status.
4. Click OK.

Re-open Closed Files

Procedure

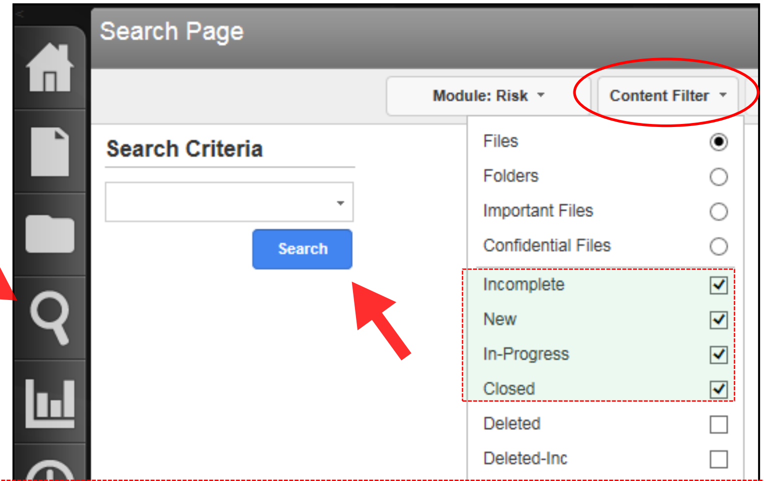
1. Click the Search icon from the Navigation Toolbar.
2. Click Content Filter
3. From the pop-up, ensure that only the Closed option is checked off
4. Click Search
5. From the results options, select the checkbox of the desired file.
6. Click Open.
7. Click More Actions
8. Select Re-Open from the list.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

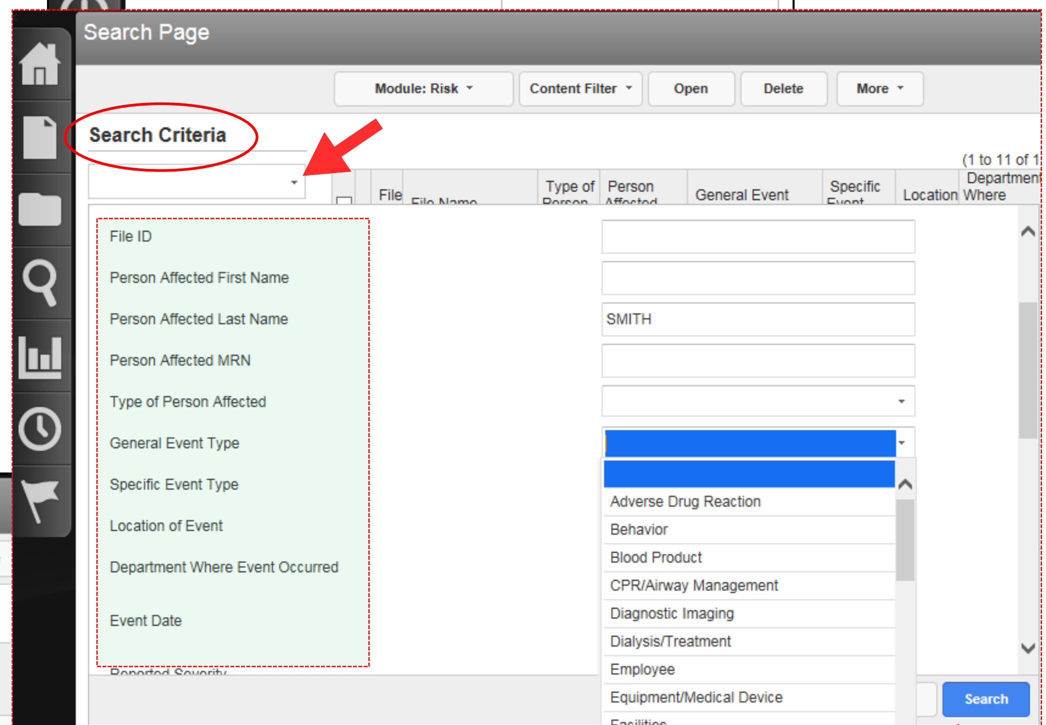


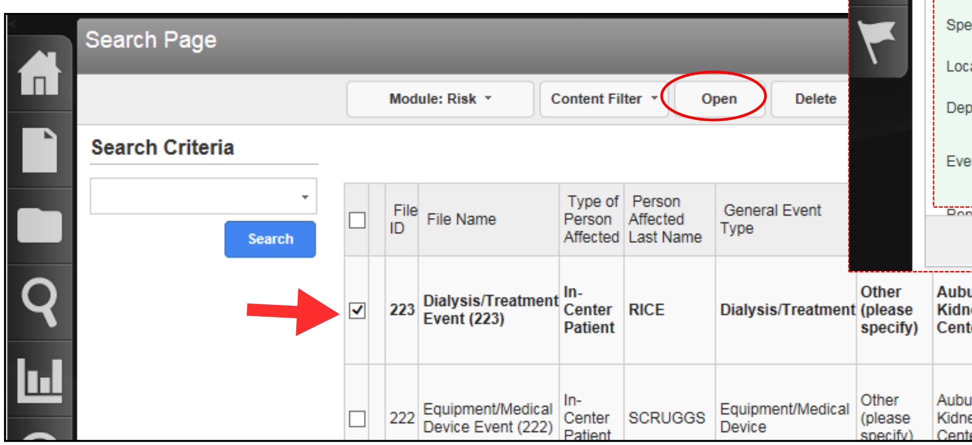


Search for a File(s)

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

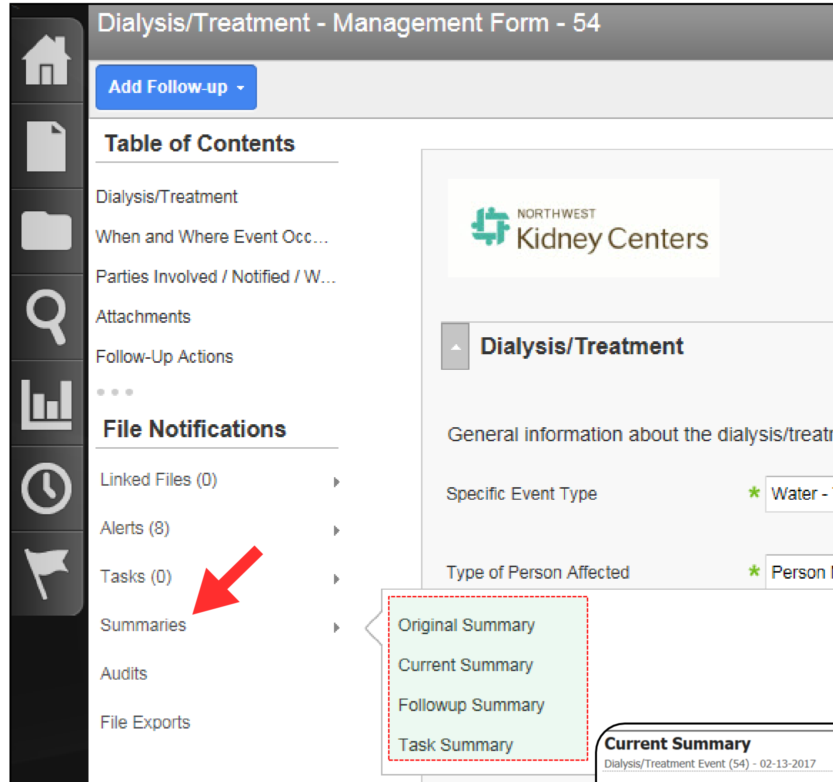
1. Open the file you wish to print

2. Click on Summaries on the left hand side under the File Notifications section

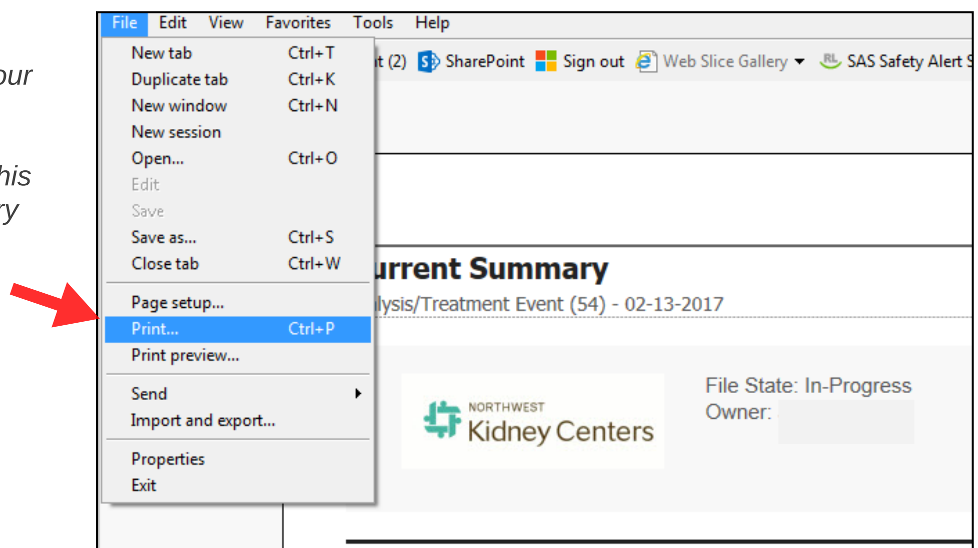
3. Select the type of summary you wish to print. A new tab on your browser will appear with the file summary

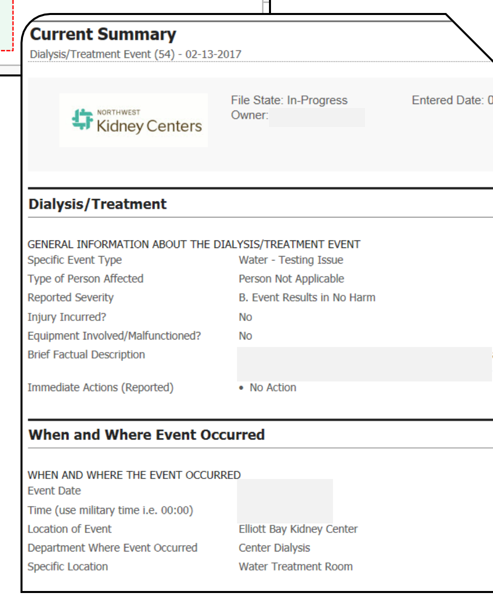
   - **Original Summary:** Summary of file as originally entered by submitter
   - **Current Summary:** Current summary of the entire file; includes all work done on the file
   - **Follow-up Summary:** Summary of the Follow-up actions only
   - **Task Summary:** Summary of the Tasks on the file only

4. On your browser, under File, select Print and proceed with your desired printing settings



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.





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.