Contents

Clinect Portal Incidents

The incidents section of the portal is where you can view and manage all incident-related activity. There are two types of incidents, Triggered and Manual.

Triggered Incidents: Incidents created automatically when specific responses to select survey questions are submitted.

Manual Incidents: Incidents created manually by a user via the incident form.

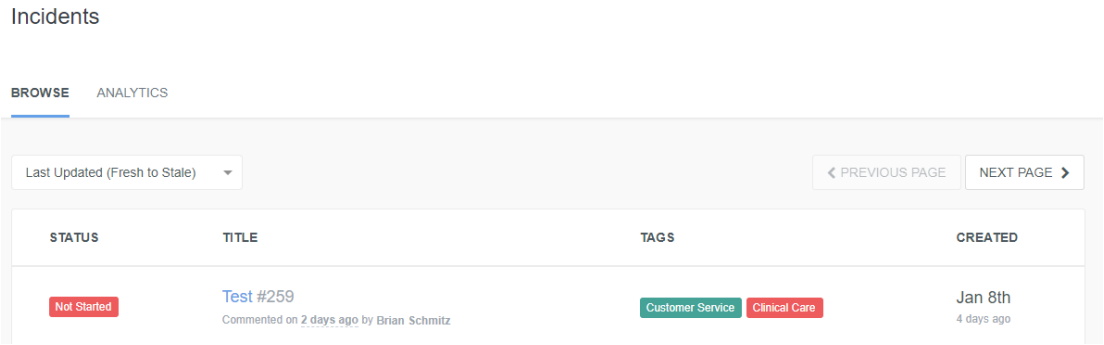
When an incident is created, there is the option to include select portal users as 'Followers'. The practice can assign automatic Followers for triggered incidents based on location, provider, and/or survey question/response.

Followers receive an automated email notification to make them aware of the creation of the incident. The email contains a link to the specific incident, where they can view details and take any necessary action.

Clinect's incident management tool is intended for staff documentation. Details related to the incident, including any comments added by staff, will not populate in the patient's EHR record or PM account.

Browse Incidents

Incidents open to the Browse section. Here you can view, sort and filter the list of all incidents that have been created. The 'Previous Page' and 'Next Page' buttons can be used to navigate through the list of incidents. This page also shows the Status, Title, Tags and Created date at a glance.



Status: The status indicates the progression of the incident resolution. All incidents default to a status of 'Not Started'. To edit the status, you must first 'open' the incident by clicking on the title (in blue).

Title: The Title for triggered incidents will reference the name of the survey and the first question that triggered the incident. For manual incidents, the title is entered by the user creating the incident. In both cases, a system generated Incident ID will populate at the end of the title. Clicking on the blue title will open the incident management section.

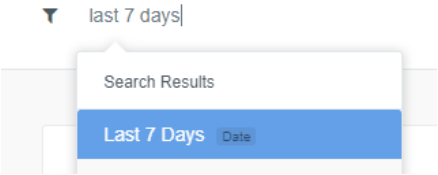
Tags: Any tags added to the incident will be displayed in this column. To add or edit tags, you must first 'open' the incident by clicking on the title. Once opened, place your cursor over the word 'Tags'. You will see the 'Tags' turns blue which indicates that you can click on this word. A plus sign will appear, click on the plus sign and a drop-down menu of tag options and a search bar will populate.

Created: The date of when the incident was created will appear in this column.

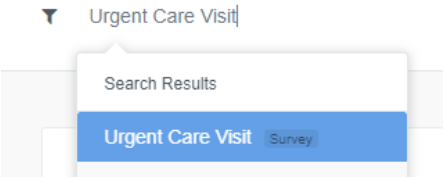
Incident Filters

You will find the filter field at the top of the Incidents page, just like the Dashboard page. Any filters that were added on the Dashboard (or other section of the portal) will populate here unless removed. This includes the date default filter. In addition to filtering by Date, Survey, Provider and Location, there are a few additional filter options available for Incidents. You can also filter by Incident Status, Tag and Person.

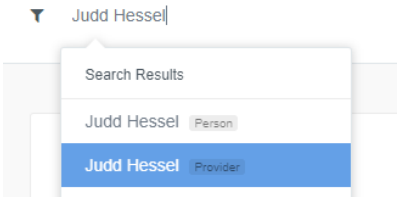
Date Filter: Type in any of the following date options (only one Date filter may be applied at a time): 'Today', 'Last 7 Days', 'Last 30 Days', 'Last 60 Days', 'Last 90 Days', 'Previous Quarter', 'Previous Month', 'Previous Year', 'Previous Week'; 'This Quarter', 'This Month', 'This Year', 'This Week'



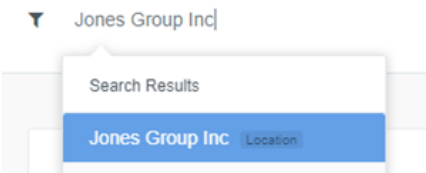
Survey Filter: Type in the name of the survey(s) or type '*survey'* if you are unsure of the exact survey names used by your practice. It will have the name of the survey and an identifiable tag such as "the work survey".



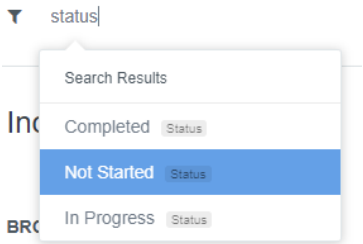
Provider Filter: Type in the name of the rendering provider(s). If you filter by multiple providers, it will show you data for all the providers included. In the example below, you will see that the name appears twice. If you want to filter the data by Provider, make sure to select the name that shows 'Provider' (and not 'Person') to the right. We also have the ability to create provider 'groups' that you can filter by.



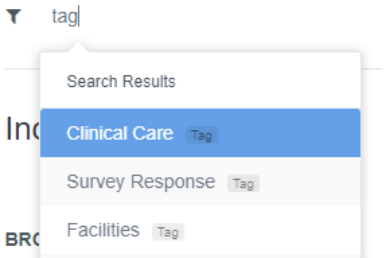
Location Filter: Type in the name of the service location(s). If you filter by multiple locations, it will show you data for all the locations included. We also have the ability to create location 'groups' that you can filter by.



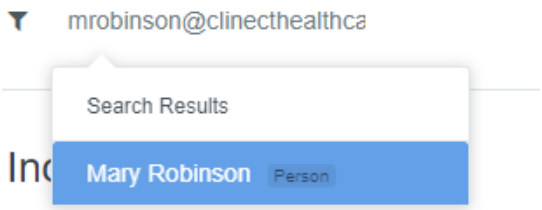
Status: Type in the name of the incident status you want to filter by or type the word 'Status' to display the available options. Custom statuses can be added by request. Most practices start with these three, 'Not Started', 'In Progress', and 'Completed'.



Tag: Tags are used to categorize incidents. Type in the name of the tag you want to filter by or type the word 'Tag' to display the available options. We start you off with a list of suggested tags, but custom tags may also be added.

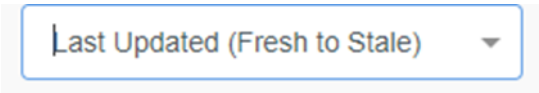


Person: You can filter by Person to isolate incidents specific to a patient and/or follower. Followers are users added or assigned to incidents, typically because they should be aware of the incident or possibly act to resolve it. Type in the name or email address of the patient or user/follower to see all the incidents they are included on. For patients, you can also type their Patient ID into the filter field.



Incident Sorting Options

In addition to filtering, you can also change the order of how the incidents are listed by using the sort options. This is a great tool to help monitor and work the queue of incidents. The default order is 'Last Updated (Fresh to Stale). You can click on the arrow to the right to expand the full menu of sort options.



Date Created (New to Old): Lists most recently created incidents on top.

Date Created (Old to New): Lists oldest incidents on top.

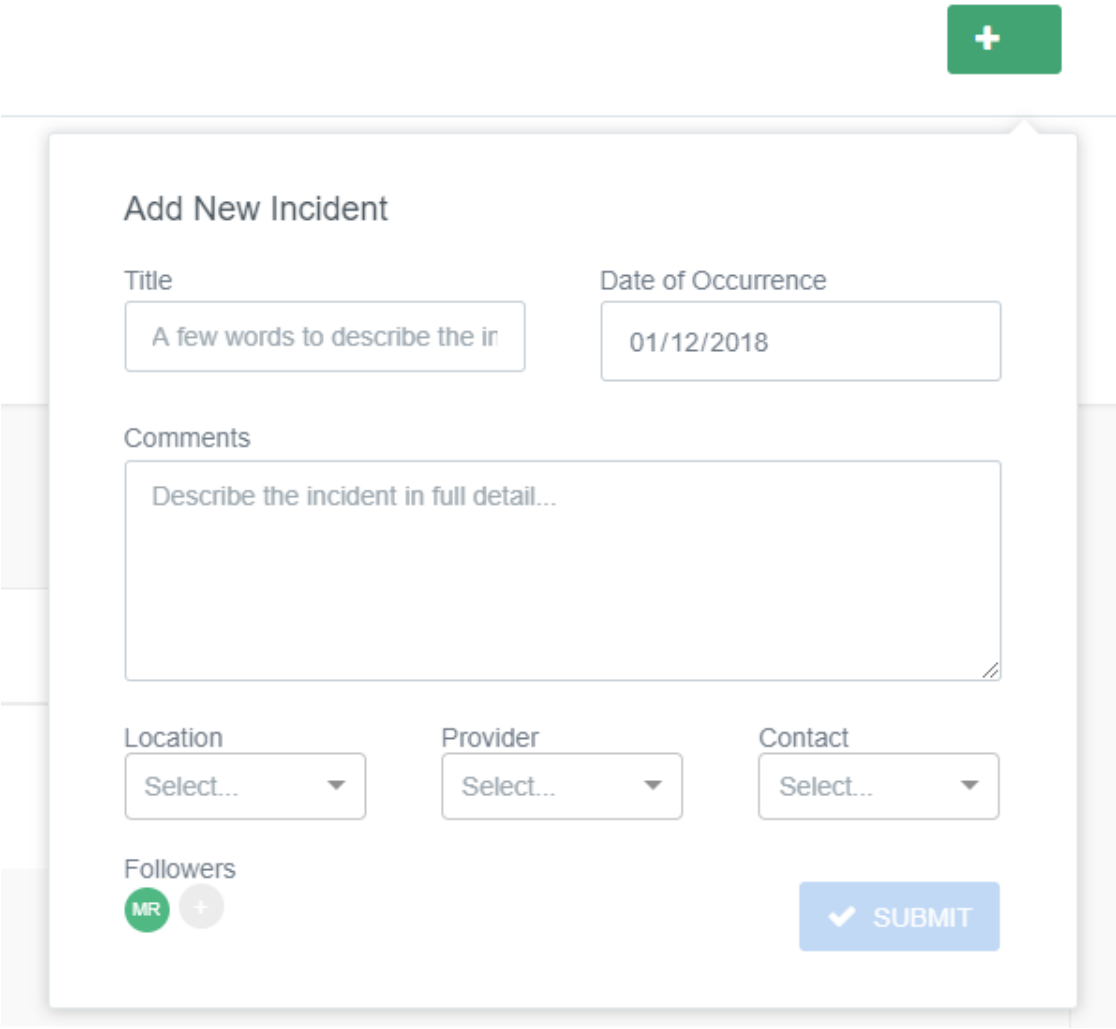
Last Updated (Fresh to Stale): Lists incidents with the most recent action on top.

Last Updated (Stale to Fresh): Lists incidents that have not had recent action on top.

Status: Groups incidents with the same status together, listed in alphabetical order of the status name.

Title (A to Z): Lists incidents in alphabetical order by title.

Title (Z to A): Lists incidents in reverse alphabetical order by title.



Creating Manual Incidents

To create a manual incident, click on the green box with the white plus symbol. The incident form will populate.

Title: The title that you enter will appear in the title column on the Browse page. You can sort by title name, so standardization may be helpful.

Date of Occurrence: The current date will automatically populate here, but you can edit it to reflect any past date.

Comments: This is where you will provide the details of the incident you are documenting.

Location: If the incident is specific to a service location, you can choose from a list of active locations by clicking on the drop-down arrow.

Provider: If the incident is specific to a provider, you can choose from a list of active providers by clicking on the drop-down arrow.

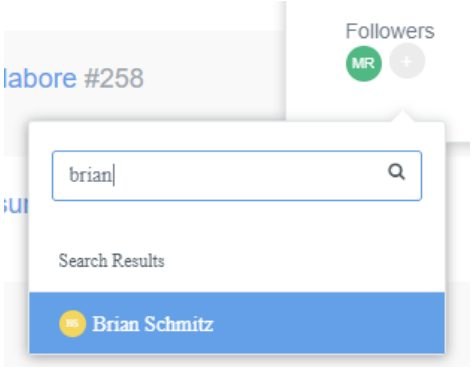
Contact: If the incident is specific to a patient, you can search by their name or email address by typing in the contact field. Please note that only patients who we have attempted to send a survey to will appear in the search. You can enter the patient details into the Comment section for any patients who are not accessible in the search.

Followers: Followers are users who should be aware of specific incidents and possibly involved in the resolution. For manual incidents, the user who creates the incident is automatically added as a follower. In both cases additional followers can be manually added.

All added followers receive an email notification when they are added to an incident or one is automatically triggered. The email will contain a link directly to the incident management page.

To add a follower, click on the grey circle with the '+' symbol. A search menu will display. Type in the first and last name of the portal user you want to add. Click on their name when it appears in the list below the search box. They will be added as a follower and the email notification will automatically be sent to them.
Please note that only portal users can be added as followers, as they will need to have login credentials for the portal to access the incident management screen. This is for security and HIPAA reasons, due to the nature of the incident information.

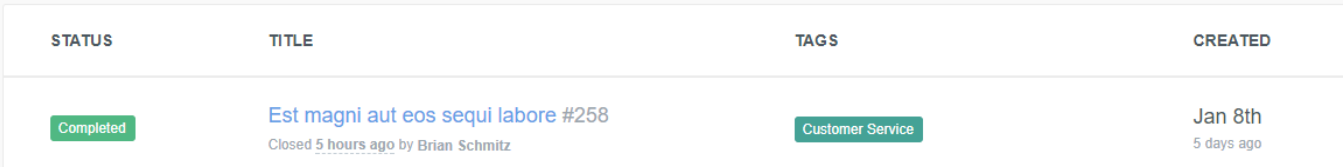
If you are unable to add a portal user to an incident, it may be that they have conflicting permissions. If they are not authorized to view information for the survey, provider and/or provider associated with the incident the system will not allow them to be added as a follower.



Submit: Once all the fields have been completed, click on the blue 'SUBMIT' button to create the incident. You can add Tags and additional comments as well as edit the Provider, Location and Followers after the incident is created.

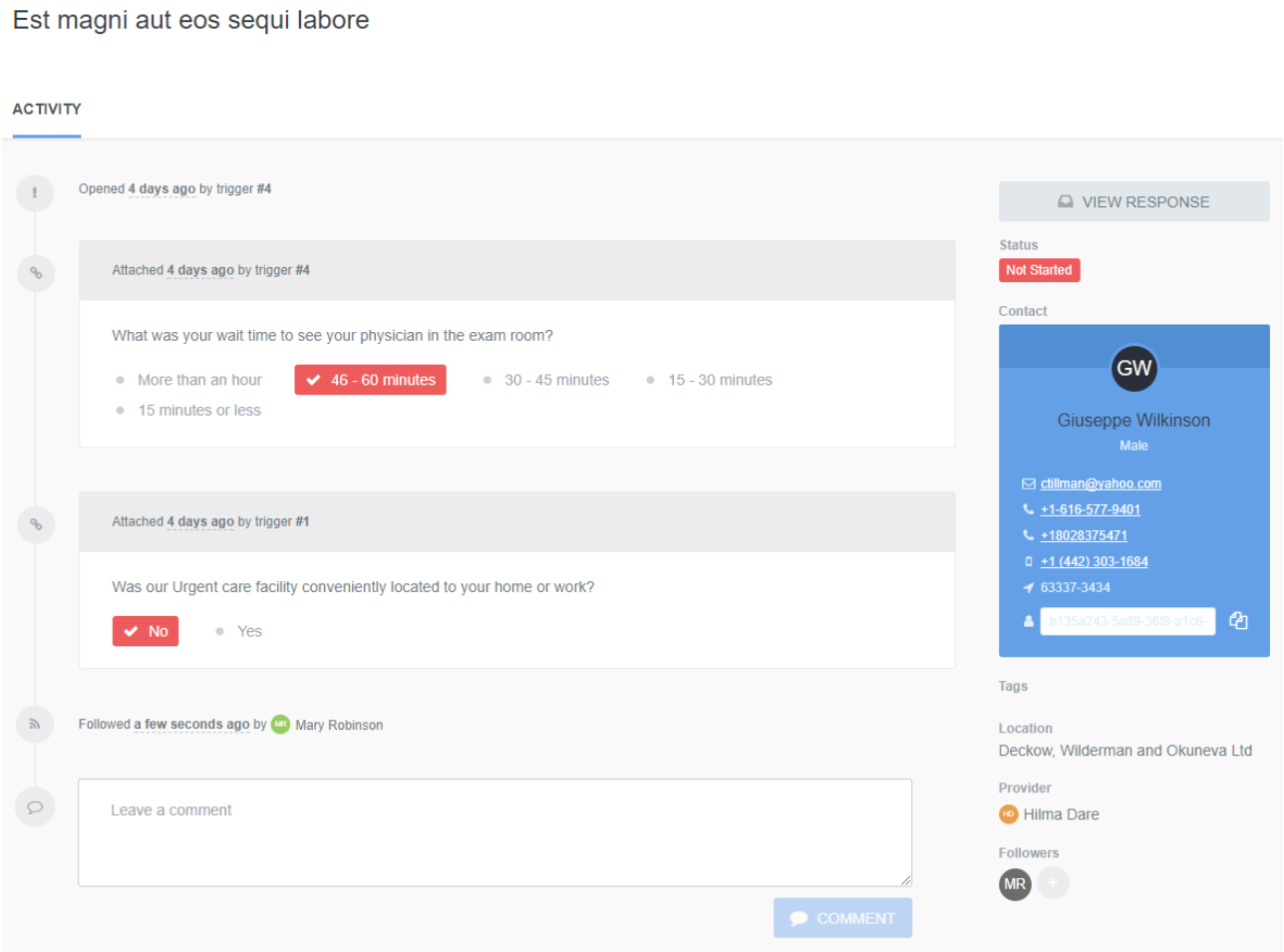
Managing Triggered and Manually Created Incidents

While on the main Incidents page, click on the title in blue to open the incident.



The incident management screen will open. This is where you can view additional details related to the incident and apply documentation. From the incident management screen, you can view the activity timeline, add comments,

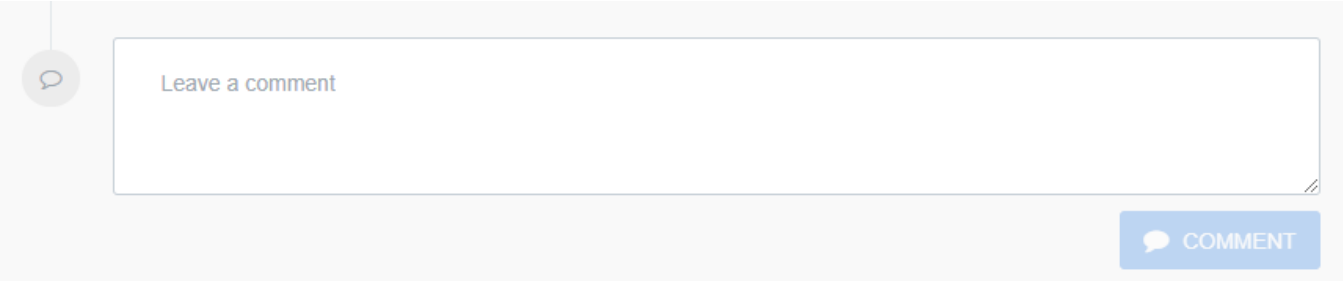
apply tags, edit the incident status, add followers and even edit the associated provider and location. If the incident is triggered by a survey response, you will see the question(s) and response(s) that triggered the incident. You also can view the entire survey as submitted by the patient.



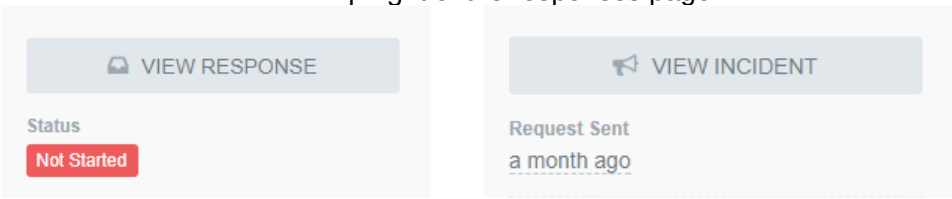
Incident Title: The title of the incident is shown at the top. If it is a triggered incident, the title will contain the name of the survey and the first question that set the trigger. Titles for manual incidents will appear as what was typed into the Title field when the incident was created.

Activity Thread: The activity thread shows a timeline of all notable activity that has taken place on the incident. This includes when the incident was opened, the question(s) and response(s) that triggered the incident, added followers, status updates, and comments that have been documented. Each activity is automatically time/date stamped and includes the name of the user who associated with the activity.

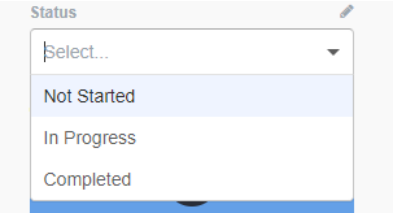
Comments: Comments can be documented by typing into the white text box and clicking on the blue 'Comment' button to save. There is no limit to how many comments can be added. A new text box will appear each time a comment is saved. (Please Note: Once a comment has been saved it cannot be edited.) The comments added to the incident management screen may only be accessed via the Clinect portal or from reports generated within the portal. The information is not shared with the patient nor does it populate in the patient's PM or EHR account.



View Response: If the incident was triggered by one or more responses to survey questions, there will be a grey 'View Response' button on the top right of the incident management screen. Clicking on 'View Response' will allow you to view the entire survey as submitted by the patient. To return to the incident management screen, you can click on the grey 'View Incident' button on the top right of the responses page.

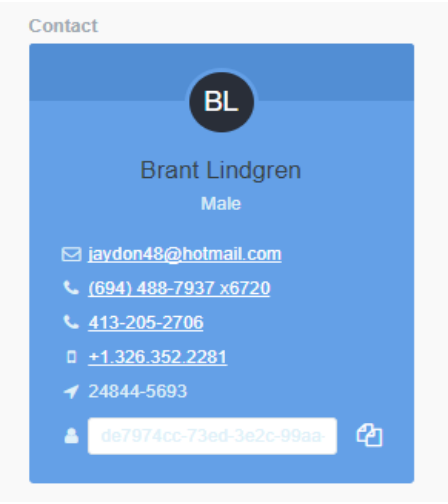


Status: The status identifies the progress of an incident. The default status is 'Not Started'. If you hover your cursor over the word 'Status' you will see that the cursor changes from an arrow to a pointing finger. This indicates that you can click there to act. When you click on the word 'Status', you will see a drop-down menu appear. You can choose from the options to update the status. The status options typically include Not Started, In Progress and Complete. Custom statuses can be added by submitting a support ticket to support@clinecthealthcare.com.

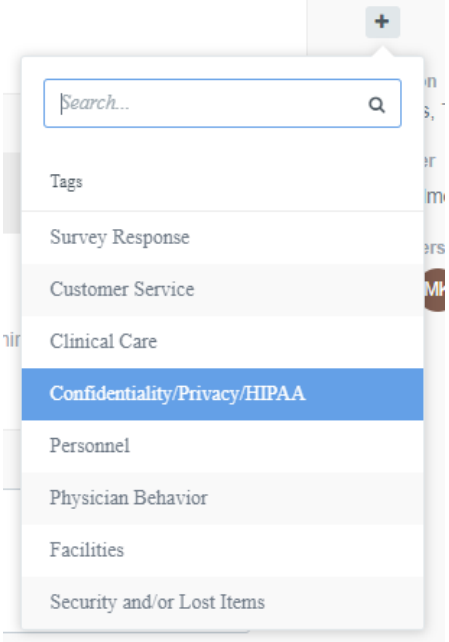


Contact: The blue box on the right, below status, is the Contact information section. his is where you will find details for the patient associated with the survey that triggered the incident or added to the manual incident.

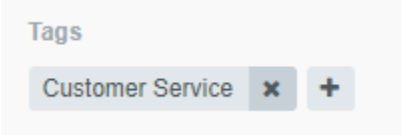
Details typically include the patient's name, gender, email address and/or phone number and Patient ID. The ID shown in the white box can be used to look the patient up in the practice's PM and/or EHR system. You can use the icon to the far right of the box to copy the ID to your computer's clipboard. Then just paste into the associated search field within the PM or EHR system.



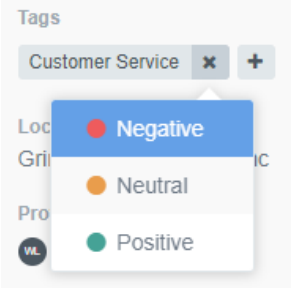
Tags: Tags can be applied to categorize the nature of an incident. If you hover your cursor over the word 'Tags', you will see that the cursor changes from an arrow to a pointing finger. Again, this indicates that you can click there to act. When you click on 'Tags' you will see a grey box with a '+' symbol appear. Clicking on that box will open the tag selection menu. You can use the search box to find a specific tag or you can click on a tag from the list that appears.



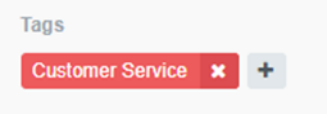
When a tag is selected, it will appear on a grey background. That indicates that a sentiment has not yet been applied.



To apply a sentiment, click on the tag and a sentiment selection menu will appear. You can choose from Negative, Positive and Neutral sentiments. The color of the tag background will change based on the sentiment selected.

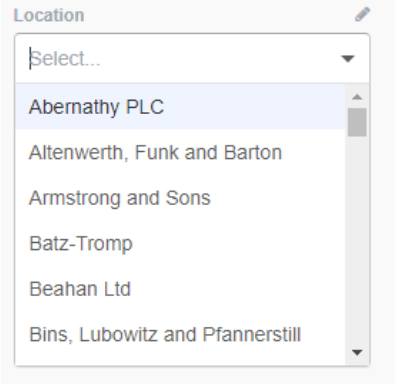


There is no limit to the number of tags that can be applied to a single incident. Just follow the steps above to apply additional tags. To remove a tag, you can click on the small 'x' to the right of the tag name.

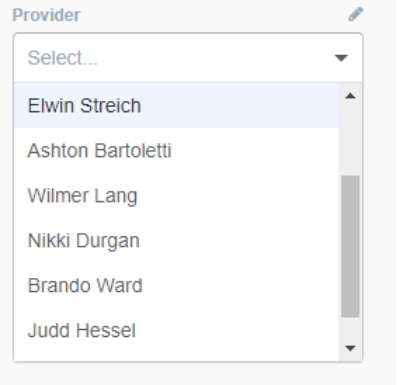


If you are unable to apply a sentiment or remove a tag, it is likely that you are no longer in edit mode. Click on the word 'Tags' to open edit mode.

Location: For triggered incidents, the location displayed is the service location of the patient encounter associated with the survey. For manual incidents, the location can be manually added during the creation of the incident. In most cases, you will not need to edit the location listed. However, if needed, you can change the location by clicking on the word 'Location' and select from the drop-down menu that appears.



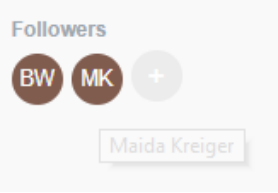
Provider: For triggered incidents, the provider displayed is the rendering provider of the patient encounter associated with the survey. For manual incidents, the provider can be manually added during the creation of the incident. In most cases, you will not need to edit the provider listed. However, if needed, you can change the provider by clicking on the word 'Provider' and select from the drop-down menu that appears.



Followers: Followers are users who should be aware of specific incidents and possibly involved in the resolution. For triggered incidents, you may have followers automatically added based on specific questions, responses, providers and/or locations. For manual incidents, the user who creates the incident is automatically added as a follower. In both cases additional followers can be manually added.

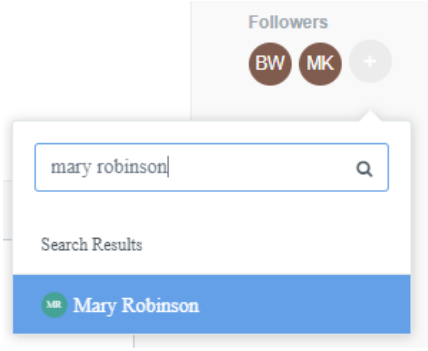
All followers receive an email notification when they are added to an incident, whether they are added automatically or manually. The email will contain a link directly to the incident management page.

The initials of each follower are shown in the circles in the follower section. If you hover your cursor over the circle, you will see the full name of the follower.



To add a follower, click on the grey circle with the '+' symbol. A search menu will display. Type in the first and last name of the portal user you want to add. Click on their name when it appears in the list below the search box. They will be added as a follower and the email notification will automatically be sent to them.

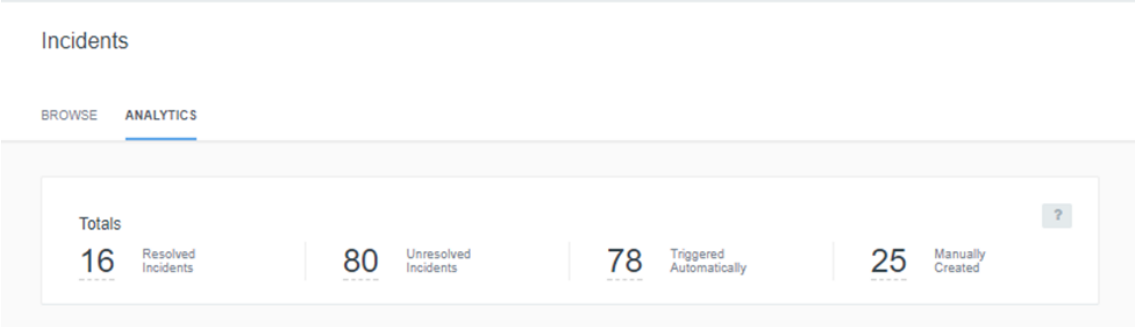
Please note that only portal users can be added as followers, as they will need to have login credentials for the portal to access the incident management screen. This is for security and HIPAA reasons, due to the nature of the incident information.



If you are unable to add a portal user to an incident, it may be due to conflicting permissions. If they are not authorized to view information for the survey, provider and/or provider associated with the incident the system will not allow them to be added as a follower.

Incident Analytics

To access the incident analytics, click on the word 'Analytics' at the top of the page (next to 'Browse'). Here you can view totals associated with the incidents. All the totals are calculated with consideration of any filters that are applied.



Resolved Incidents: The total number of incidents that have been resolved and completed, based on the assigned incident status.

Unresolved Incidents: The total number of incidents that have not been resolved and have possibly not yet been started, based on the assigned incident status.

Triggered Automatically: The total number of incidents created automatically, based on the submission of specific responses to select survey questions.

Manually created: The total number of incidents created manually by users.