MI-ACTS USER GUIDE

FOR

FACILITY TRAINING

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1) Overview

MI-ACTS (Michigan entry into ASPEN Complaint Tracking System) is a web-based application that automates the Facility's process of adding, updating, viewing, deleting drafts and submitting incident and investigation reports to the State of Michigan.

To navigate through MI-ACTS a navigation panel is situated on the left side of every screen.

Click on the screen name in the navigation panel to open the screen.

Navigation may also be achieved from the Task List screen to the Incident and Investigation screens. See Chapter 2w for information on Task List.

The toolbar 

is at the top of every screen. Clicking on:

- Save - commits the information entered as data to be stored on the MI-ACTS database.
- Submit - commands the database to submit the incident to the State Agency (SA) and change the workflow status.
- Print - results in printing a single page image of the screen the worker has open.
- Clear - refreshes the screen to a blank screen.
- Logout - exits the worker from MI-ACTS

The required fields are noted with a red * asterisk before the field title. If the required fields are not populated prior to clicking the Save button, the system provides an error message to notify the worker to "Enter the Required Fields".

A Help feature is available on each screen/tab by clicking the blue circle with the enclosed question mark .

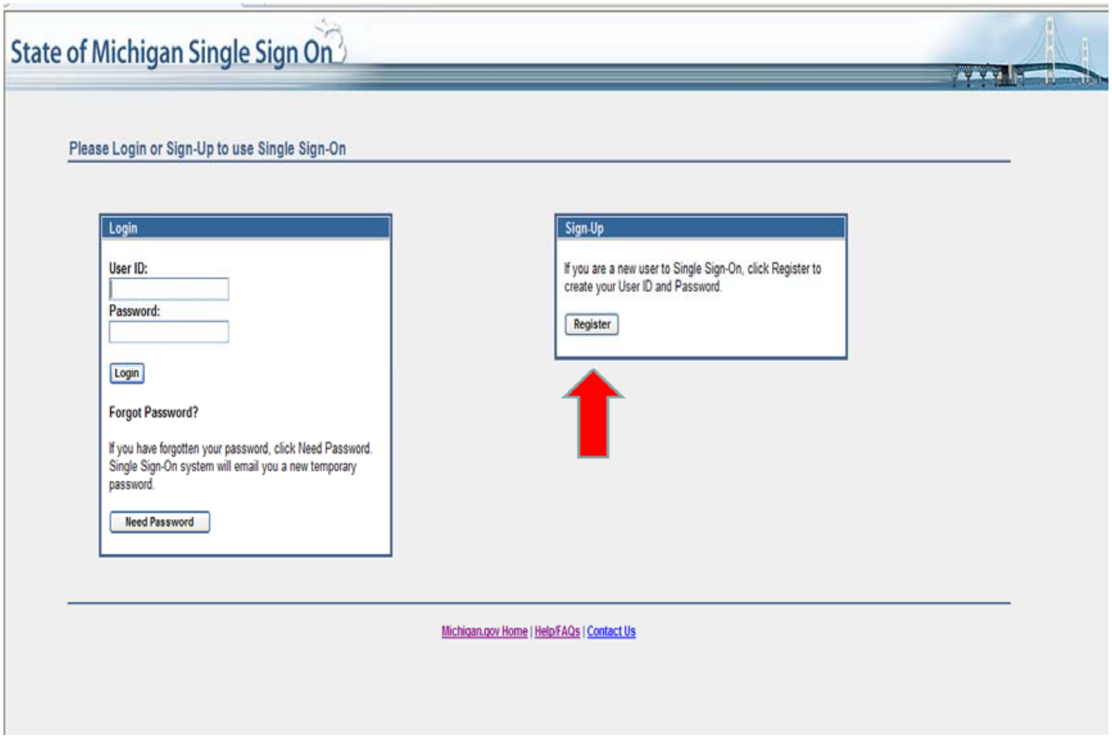
MI-ACTS IDs are assigned incrementally by the system when the Resident Tab is Saved for the Incident. What this means is a Facility in Northern Michigan may click on Save and be assigned MI-ACTS ID 00000001, while a Facility in Southeast Michigan may be assigned MI-ACTS ID 00000002.

1a) Security

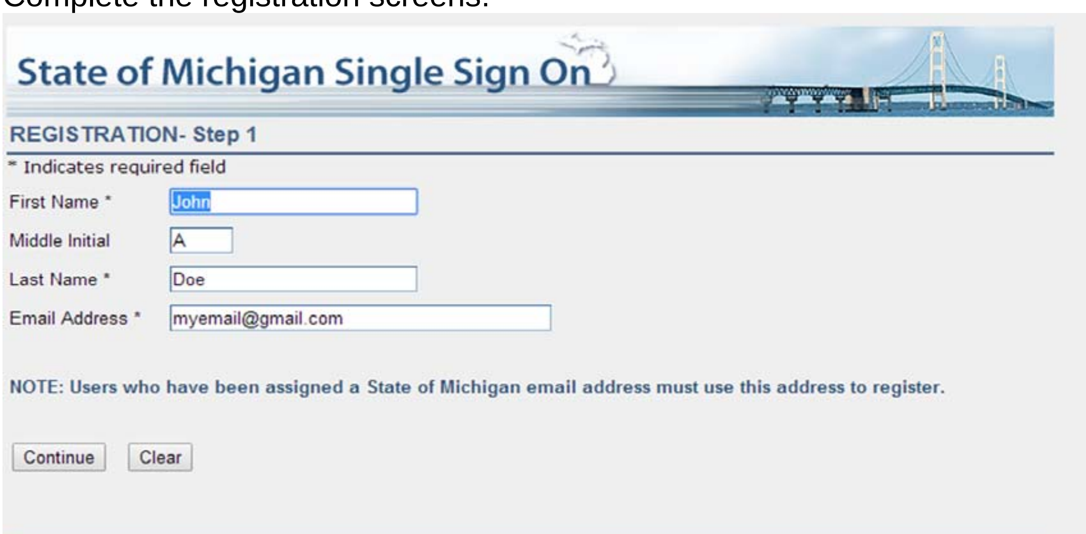
Users are required to use State of Michigan (SOM) Single Sign-On (SSO) to access the Long Term Care Provider Portal (LTCPP), where the MI-ACTS application is hosted. In addition, Role based security within the application controls access to specific functionality in MI-ACTS.

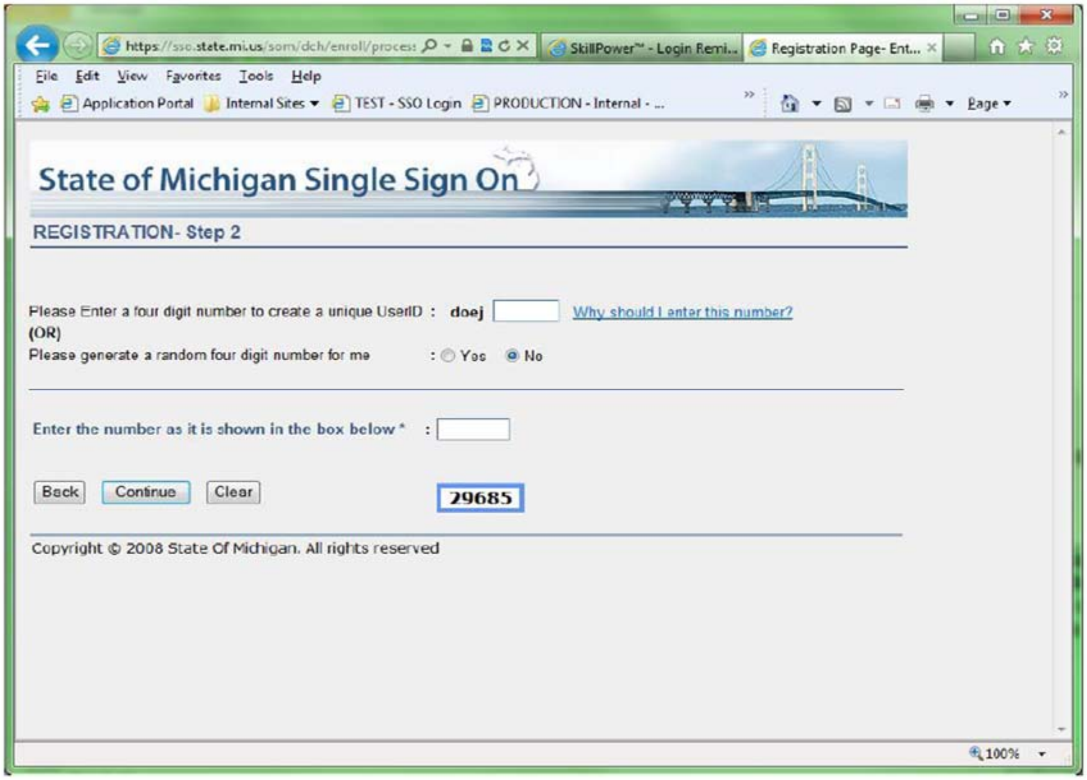
To obtain a SSO ID, Register at: https://sso.state.mi.us/

The following screen is presented. Select Register to create a new ID:



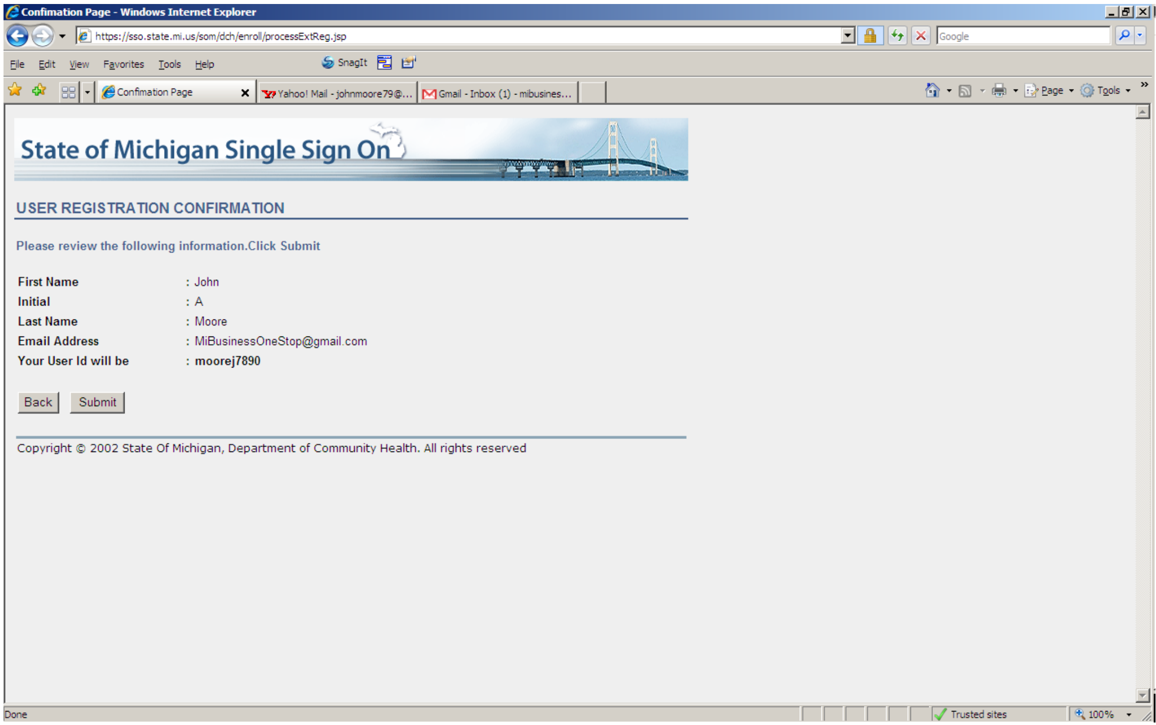
Complete the registration screens:





The system uses the Last Name, first letter of the First Name and a 4-digit number to create a user name. You may enter a 4-digit number in the box at the top of the screen, or click on the "Yes" radio button to allow the system to generate the 4-digit number.

The number in the blue-outlined box at the bottom of the screen is to protect the system from malicious attempts to flood the system with ID requests. You must enter the number presented in the blue-outlined box into the box above it.



You will receive an email within 24 hours containing your ID and password. Use the link in the email to log into SSO with your new ID and temporary password:

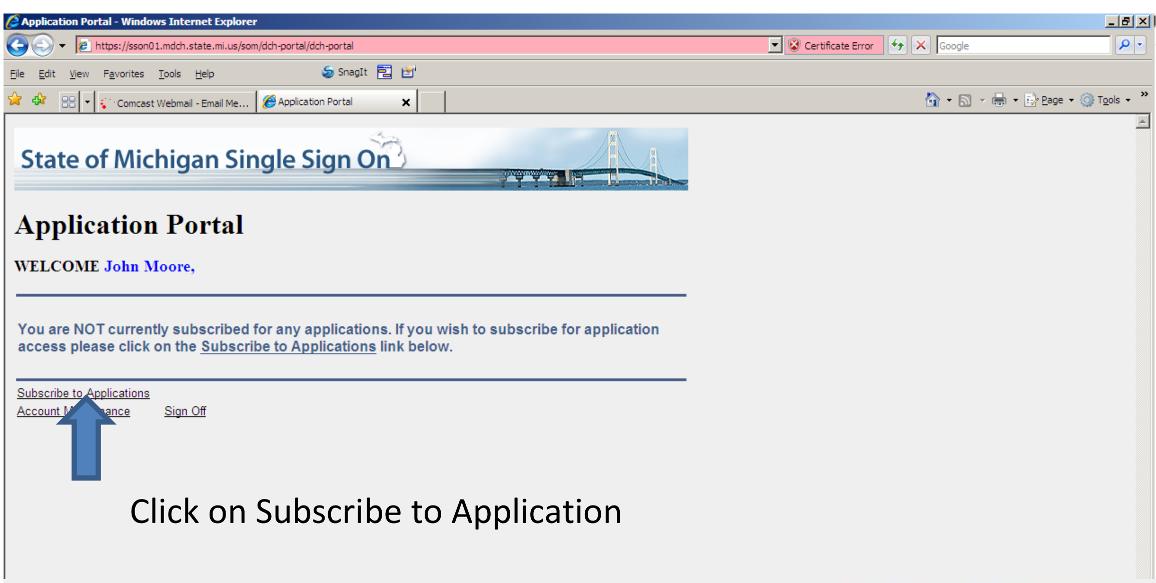
The system prompts you to change your password. Follow the instructions on the screen to create your new password.

Complete the challenge questions so that you are able to reset your own password if problems occur in the future.

- If you experience issues setting the new password, contact the DTMB Client Service Center at 517-241-9700, 1-800-968-2644 for assistance.

After you receive your SSO ID, the Facility Administrator must complete the authorization form and follow the directions on the form for submission: [SSO Authorization Form and Process].

When you log into SSO for the first time, you will be presented with the following screen:



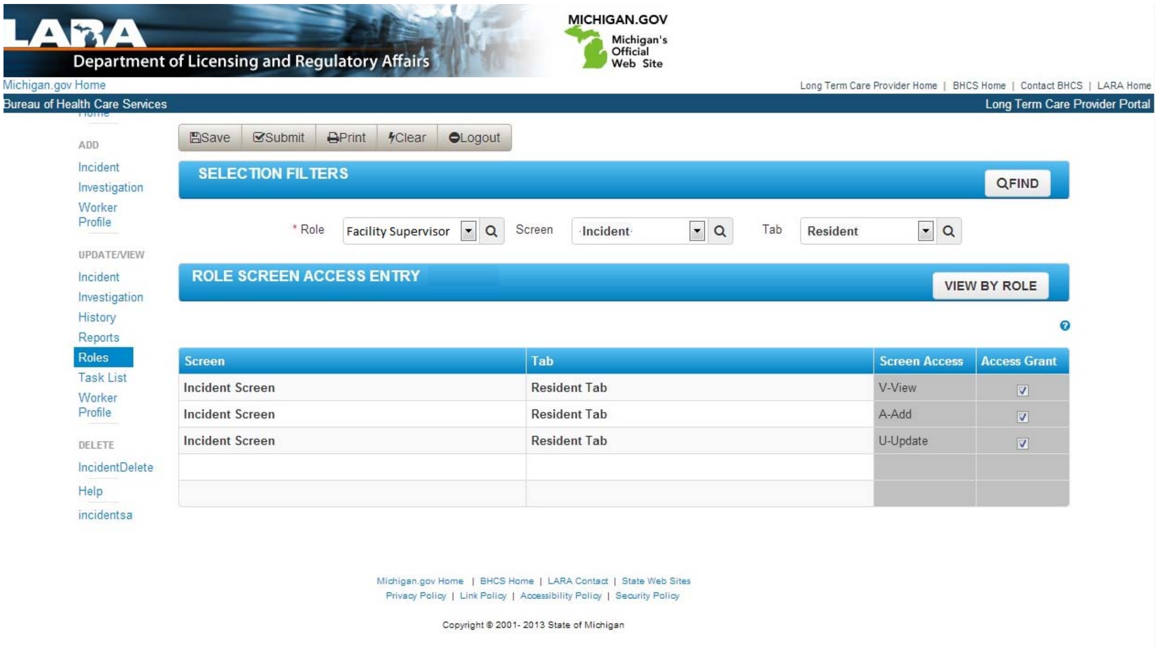
1b) Roles

The Nursing Home System Administrator has the ability to assign MI-ACTS roles to a user. Roles defined for MI-ACTS include:

ROLE	ACCESS LEVEL
Facility Administrator	Add users, Add/View/Update/Delete Incidents and Investigations, View Task List, View Reports, View History, View Maintenance Records, View Roles, Add and Update Worker Profile Records.
Facility Supervisor	Add users, Add/View/Update/Delete Incidents and Investigations, View Task List, View Reports, View History, View Maintenance Records, View Roles, Add and Update Worker Profile Records.
Facility Worker	Add/View/Update Incidents and Investigations *, View Task List, View History, View Maintenance Records, View Roles.

- * Update permitted only until the incident/investigation is submitted to the SA.

The Role screen is used by the Facility and SA roles to view the access a Role has to MI-ACTS screens and tab sections.



To view the access a Role has to screens, tabs and screen functions, navigate to the Role Screen Access Entry screen. The View Role Screen Access Entry screen function defaults as open.

Enter or select the MI-ACTS *Role and click the Find button. The system displays the access the Role has to all MI-ACTS screens, tabs and screen functions in the grid.

Enter or select the MI-ACTS *Role and enter or select a MI-ACTS screen name and click the Find button. The system displays in the grid, the access the Role has to the specific MI-ACTS screen, its tabs and screen functions.

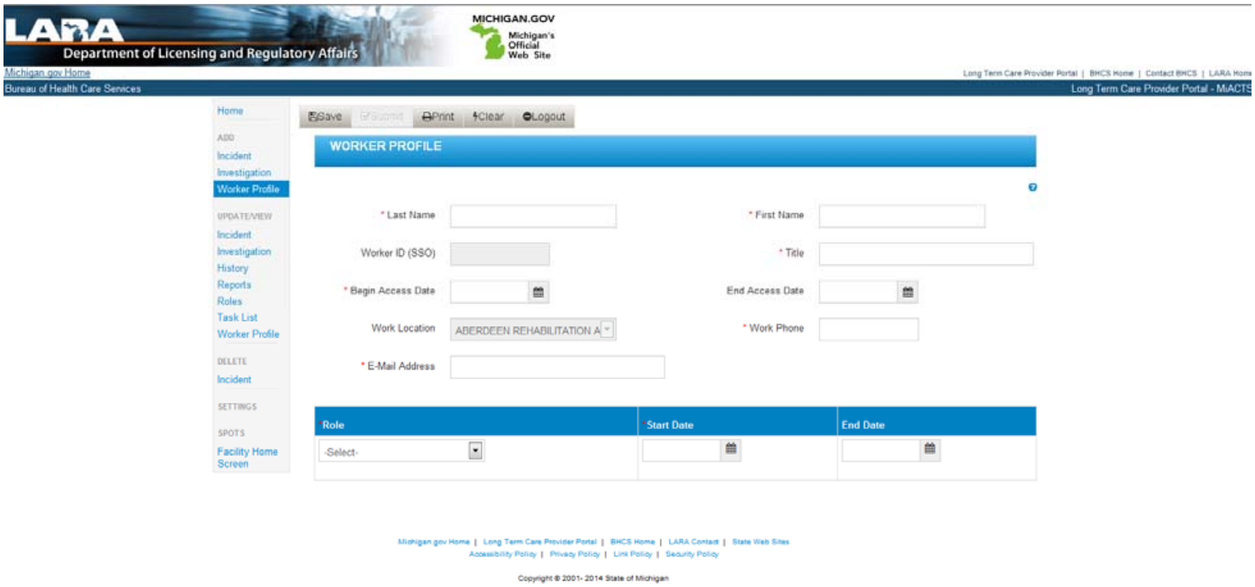
- If the Role entered or selected has access to the screen name entered, the system displays in the grid, the access the Role has to the specified screen, tab(s) and screen function(s).

Enter or select the MI-ACTS screen without entering the Role and click the Find button. The system returns an **Enter Required Fields** message.

1c) Worker Profile

The Worker Profile screen is used to control login to and security access of data in MI-ACTS. The worker must have an active State of Michigan Single Sign On (SSO) ID before they may be given the security to log into MI-ACTS. If an individual does not have an active SSO record and a Worker Profile Record in MI-ACTS, they are not able to log into MI-ACTS. The worker's access to data is controlled by the roles set by a system administrator. See Roles Screen for more on Roles and the access each role has on the system (1b).

The Worker Profile Screen allows the Administrator to add the workers profile and role(s), thus granting them access to log into MI-ACTS.



The system administrator selects Add Worker Profile from the Navigation panel. The Worker Profile screen opens with the following fields (*denotes a required field):

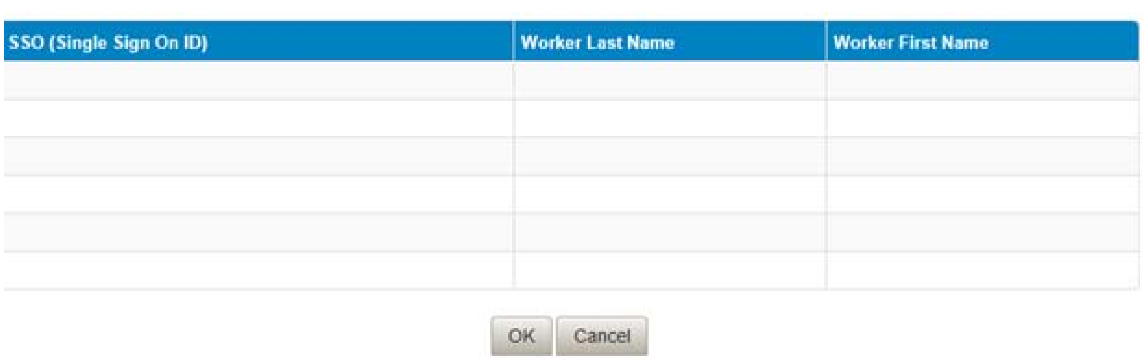
Upon the system Administrator entering data into the Last Name, First Name and Worker ID (SSO) fields, the system automatically performs a search on the Worker ID (SSO). If no match is found the Administrator or Supervisor tabs to the next field to continue adding the worker. If a match is found, the system returns the **Worker Already Exists in MI-ACTS, Add Not Allowed** message.

The Worker Profile Screen can be used by a worker to view a worker profile record. Every worker has view access to view their own Worker Profile record. A worker does not have view access to another worker's profile record, unless the worker also has a supervisor or administrator role.

To view a profile record, the worker selects Update/View Worker Profile screen from the navigation panel. To view a worker profile record, the worker must enter the Worker ID (SSO) and/or Last Name and/or First Name of the worker in the Selection Filters and click the **Find** button. If only one entry matches the name entered, the system automatically populates the following fields:

- *Worker's Last Name,
- *Worker's First Name,
- Worker's Middle Name,
- *Worker ID (SSO) – The unique, single sign-on (SSO) ID, created by the State of Michigan Security Administrator for each worker on the state systems.
- *Work Location
- *Worker's Title,
- *E-Mail Address,
- *Begin Access Date to MI-ACTS,
- End Access Date to MI-ACTS,
- *Role(s) for the specified work location,
- *Supervisor,
- *Role Start Date; and
- Role End Date.

If more than one entry matches the information entered by the worker, the system displays a popup for the worker to select from.



The worker selects the correct entry by highlighting and clicking in the row on the grid, or by highlighting the record and clicking the OK button. The system populates the information on the screen.

To terminate the search and not select an entry in the grid, click the Cancel button. The search popup closes and returns the worker to the Worker Profile screen.

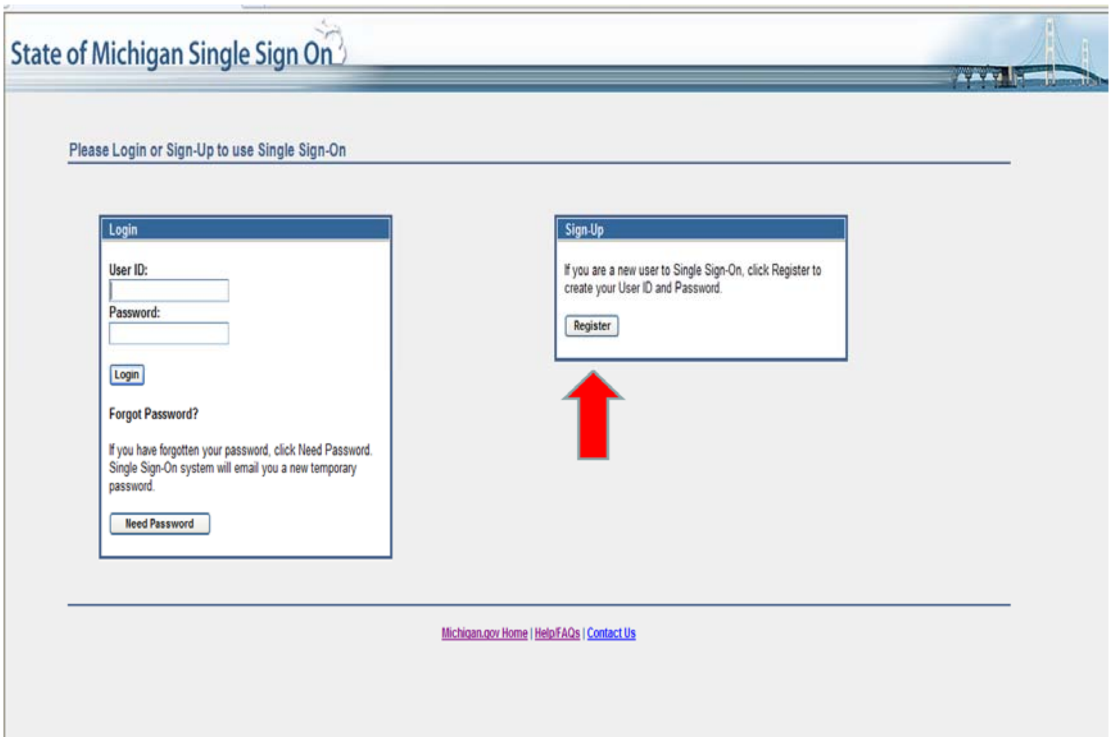
The system administrator may update the following fields in the worker profile record:

- *Title
- Access End Date
- *Role(s)
- Role End Date

Important Note: To disable/end a worker from logging into MI-ACTS, an Administrator or Supervisor must enter both an End Access Date and a Role End Date on the screen. The worker has access to MI-ACTS until midnight for the date entered.

2) *System Navigation - Facility*

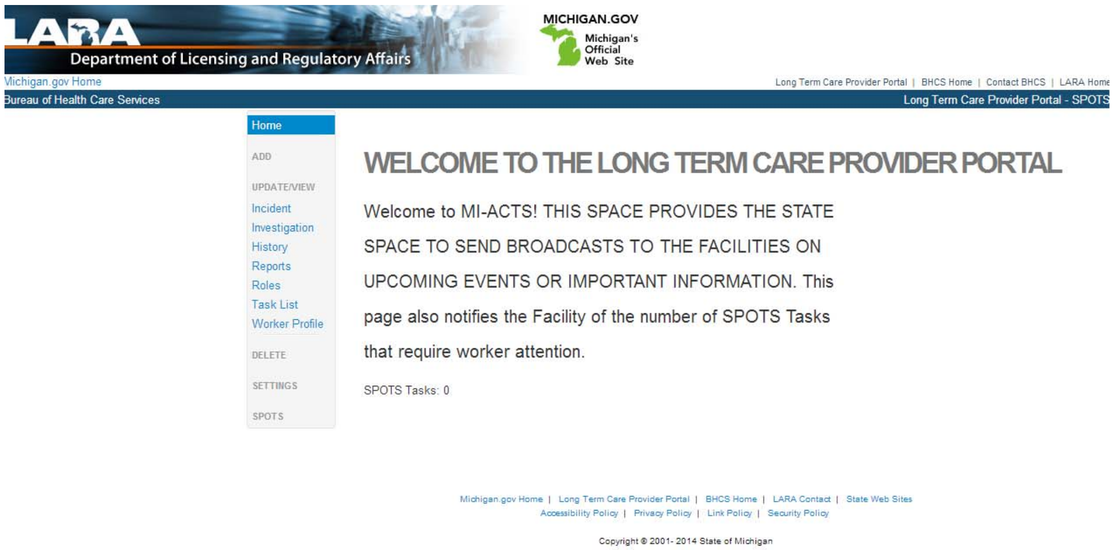
2a) Login Page



2b) Home Screen

The Home screen is the first screen that opens when a worker logs into MI-ACTS. The page allows the Facility to:

- Read broadcasts from the SA on upcoming events and important information.
- Navigate to other screens in MI-ACTS and SPOTS.
- See the number of tasks in SPOTS needing the Facility's attention.



2c) Incident Screen

The Incident screen allows the Facility worker to add, view, update and for those with the administrator and Supervisor role, even delete a draft report (an Incident Report not yet submitted to the SA. The incident screen collects information pertaining to the incident in individual tab sections* such as Resident name, Alleged Perpetrator name, Incident Summary Information, Incident Detail Information, and the individual reporting the incident. It also provides the ability to attach documents and pictures to the Incident Report.

> **Note:** *Workers using the Firefox browser may see tabs that do not appear to be enabled, but the worker can click on the tab to open.*

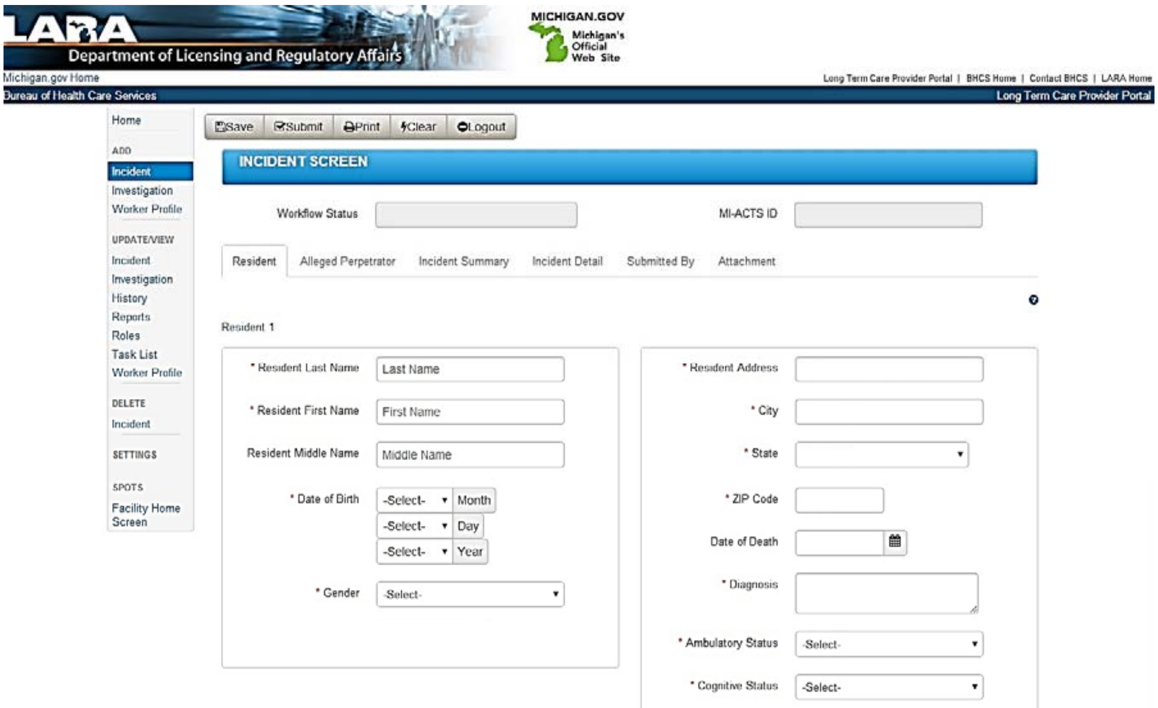
The SA cannot view the Incident Report until the Facility submits the record to the SA. After the Facility reports the incident to the SA, the information (data) for the incident is locked and may only be viewed by both the Facility and the SA.

After the Incident Report is received by the SA, the SA reviews the information for Immediate Jeopardy triage.

2d) Add an Incident – Resident Tab

Upon accessing the MI-ACTS application from the Home Page, the facility worker may open the Task List screen. This screen displays incidents and investigations that are in progress are discussed in more detail in Section 2w.

The navigation pane on the left side of the screen presents the actions that can be taken. To add an incident, the facility worker selects *Incident* under the ADD section of the navigation pane:



The Resident tab opens and all fields are enabled for the worker to enter or select information to populate the fields. The required fields are noted with a red * asterisk before the field name:

- *Resident Last Name
- *Resident First Name
- Resident Middle Name
- *Date of Birth:
  - *Month
  - *Day
  - *Year – Drop down defaults at 1930 and the worker may scroll up or down from 1930 to select the year of birth.
- *Gender
- *Resident Address - Automatically populates by the system using the Facility's Address, although the worker may manually overwrite the information.
- *City - Automatically populates by the system using the Facility's Address, although the worker may manually overwrite the information.

- *State - Automatically populates by the system using the Facility's Address, although the worker may manually overwrite the information.
- *ZIP Code - Automatically populates by the system using the Facility's Address, although the worker may manually overwrite the information.
- Date of Death
- *Diagnosis
- *Ambulatory Status
- *Cognitive Status

When the worker enters the required fields of Resident Last Name, Resident First Name, Date of Birth and Gender, the system immediately performs a search on the Resident information entered to determine if the Resident exists in MI-ACTS for the facility. This search is necessary to safe-guard against duplicate Residents being created for the facility.

- If only one Resident matches exactly with the name, date of birth and gender, the system populates the matched Resident's most current information on the screen. The worker may choose to update any information populated, as appropriate.

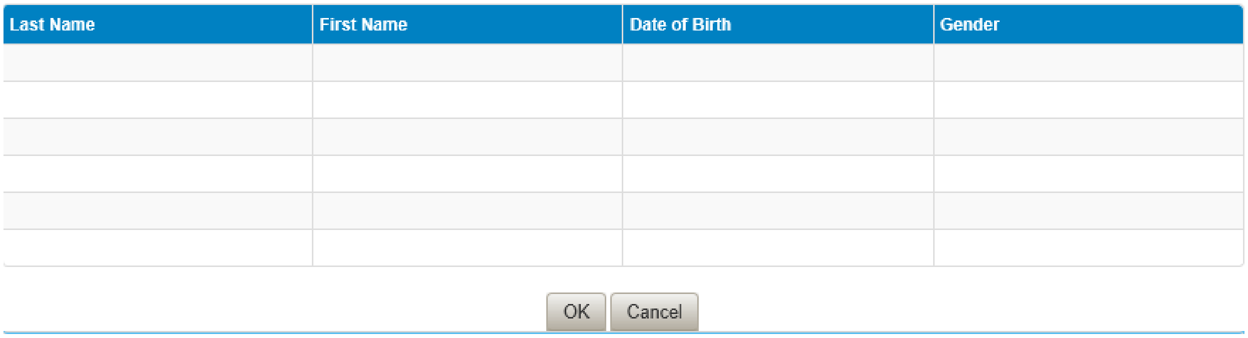
  - The data automatically populated for the Resident is:

    - *Resident Last Name
    - *Resident First Name
    - Resident Middle Name (if known)
    - *Date of Birth:
      - *Month
      - *Day
      - *Year
    - *Gender
    - *Resident Address
    - *City
    - *State
    - *ZIP Code
    - Date of Death (when applicable)

- If the search produces more than one result, the Search Results Popup screen displays the Resident Last Name, Resident First Name, Date of Birth, and Gender.

- To select a record, the worker highlights the row and clicks the **OK** button, or clicks in the highlighted row. The system populates the information for the Resident selected.

- If the decision is made not to select a Resident from the grid, click the **Cancel** button in the grid to close the Search Results Popup**.** The popup screen closes and returns the worker to the Resident screen to continue adding the Resident information.

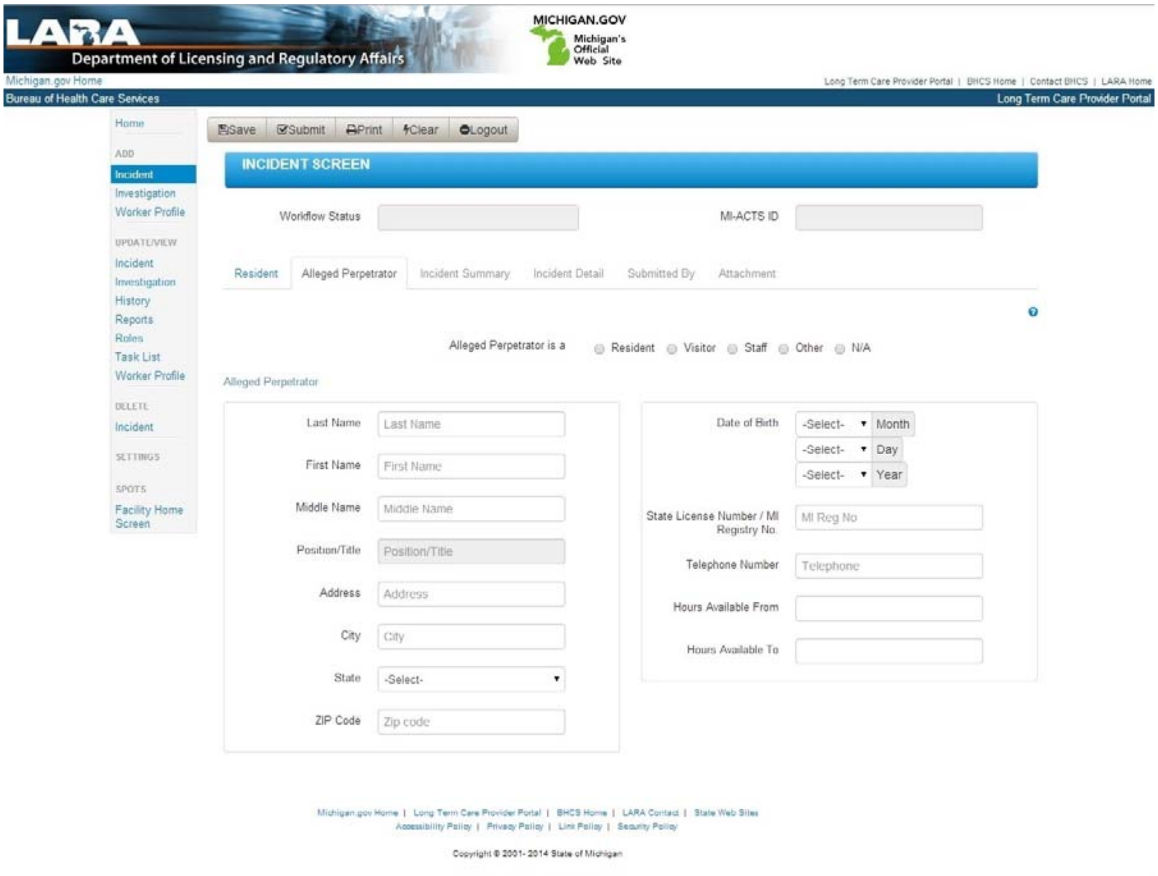


- If no match is found during the search for existing Residents, the system provides a **No Match Found** message and the worker may tab to the next desired field to continue adding the record.

- All required information in the tab must be completed and saved before navigating to the next tab. If the worker clicks on another tab before completing the required information on the current tab, the system returns the **Enter Required Fields** message. The required fields, absent of data, highlight to notify the worker of the required fields to be completed.

Note: *The worker is required to manually save the information before proceeding to the next tab. After the Add Incident is started, saving the information in the Resident Tab assigns the MI-ACTS Case ID. The Workflow status changes from blank to INCD DRAFT – Incident Draft.*

2e) Add an Incident – Alleged Perpetrator Tab



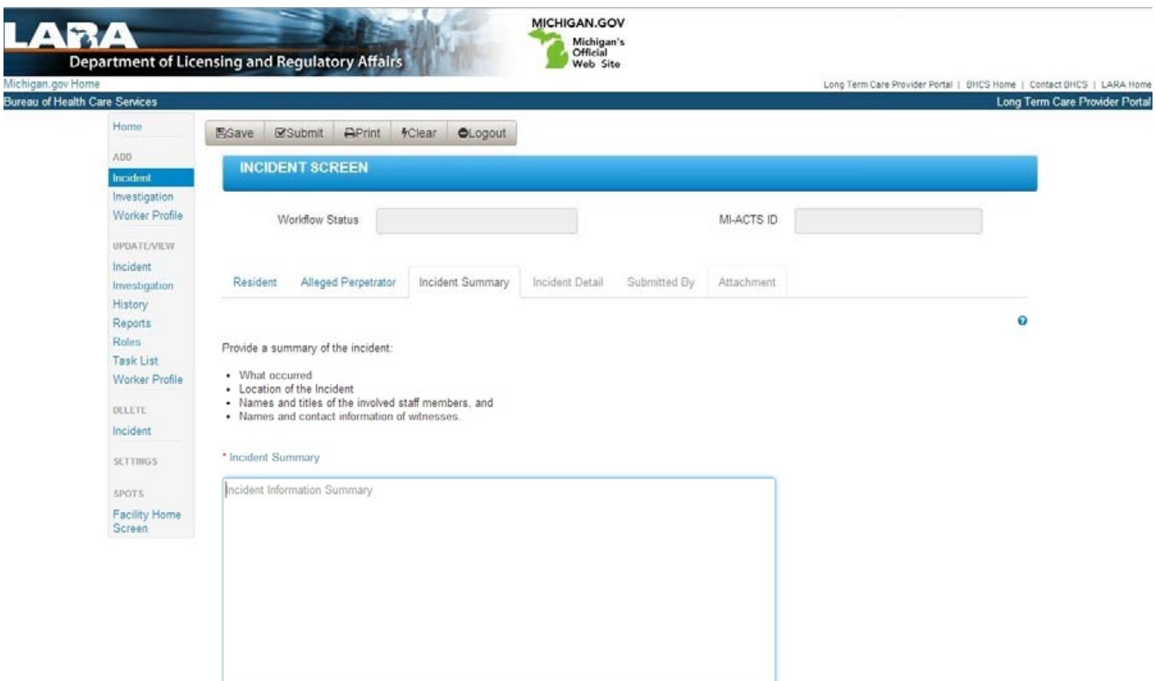
When the information in the Resident tab has been saved, the Alleged Perpetrator tab opens and all fields are enabled for the worker to enter or select information. No fields in the Alleged Perpetrator tab are required, but if data is entered in any field, the relationship the Alleged Perpetrator has to the harmed Resident is required by clicking the radio button in front of the relationship of Resident, Visitor, Staff or Other. If, after one of the radio buttons is checked, the worker wants to back out of entering an Alleged Perpetrator, the worker must clear all fields on the Alleged Perpetrator Tab and upon clicking Save, the system automatically checks the N/A button. If N/A is checked and data is entered in any field, the system automatically unchecks N/A and checks the Resident button as the default. The worker can then check any button that applies.

- Last Name
- First Name
- Middle Name
- Position/Title
- Address
- City
- State
- ZIP Code

- Date of Birth
  - Month
  - Day
  - Year
- State License Number / MI Registry No.
- Telephone Number
- Hours Available From Date
- Hours Available To Date

If the worker enters information into the Alleged Perpetrator tab, the tab must be completed and successfully saved before navigating to the Incident Summary tab.

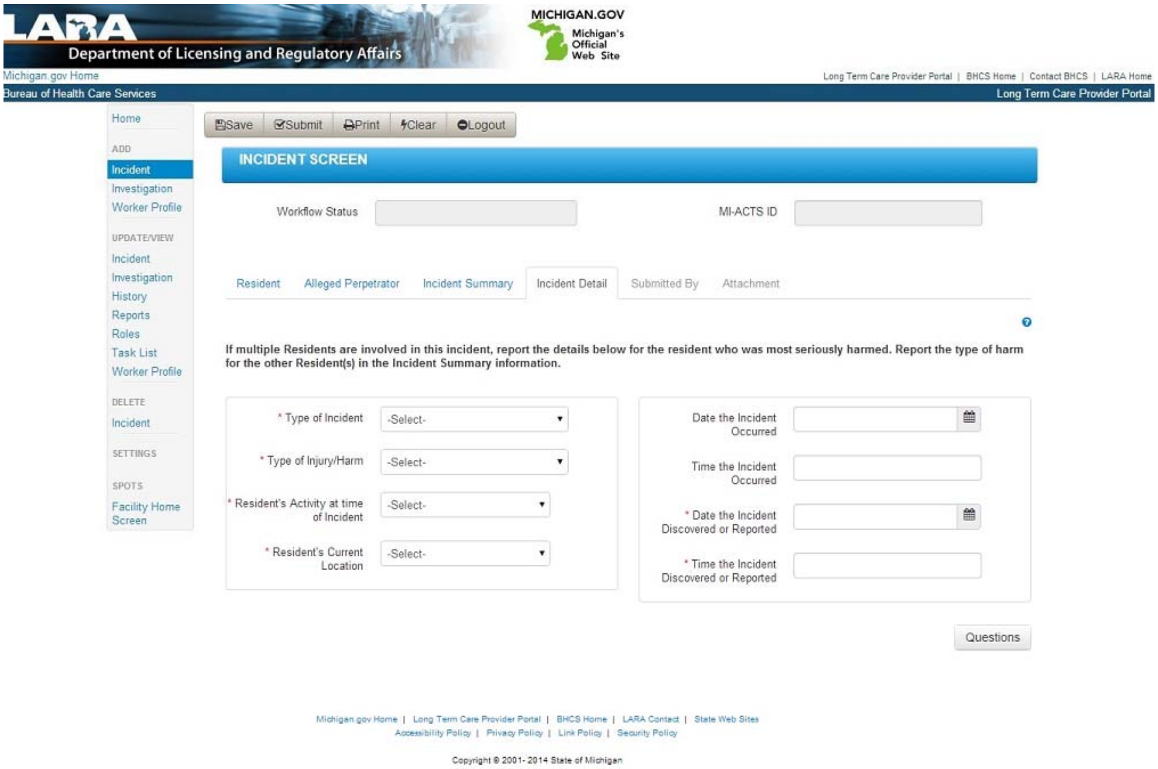
2f) Add an Incident – Incident Summary Tab



When the worker clicks on the Incident Summary Tab, the worker must manually enter the required *text directly into the notepad. The Incident Summary tab must be completed and successfully saved before navigating to the required Incident Detail tab.

The summary should include information on what occurred, where the incident occurred, the names and titles of any staff who were involved, and the names and contact information of any witnesses. If words like 'see attachment' are entered, the system does not allow the worker to save the record, an error message is provided to the worker to change the information provided. The notepad allows text to be pasted into in from another document.

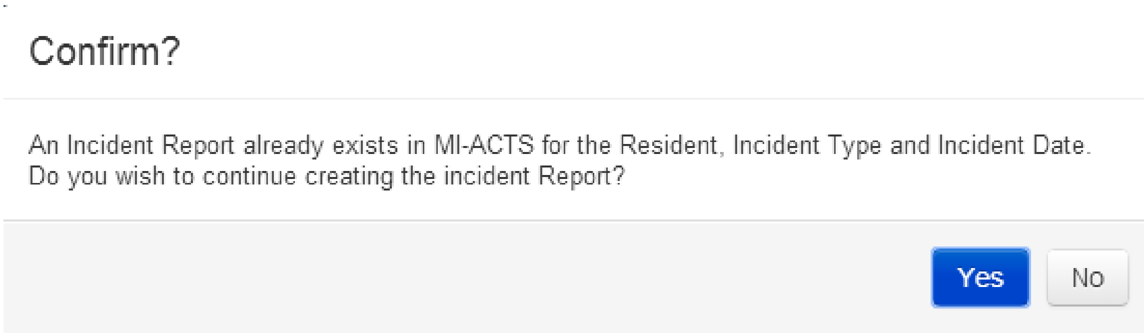
2g) Add an Incident – Incident Detail Tab



When the worker navigates to the Incident Details tab, the Incident Details tab opens and all fields are enabled for the worker to enter or select information to populate the fields:

- *Type of Incident
- *Type of Injury/Harm
- *Resident's Activity at time of Incident
- *Resident's Current Location
- Date the Incident Occurred
- Time the Incident Occurred
- *Date the Incident was Discovered or Reported
- *Time the Incident was Discovered or Reported

Before the system asks the questions pertaining to the incident, the system performs a search for duplicate Incident Reports. The search is performed on the Resident Last Name, Resident First Name, Type of Incident and Incident Date. If a match exists, the system provides a warning message of:



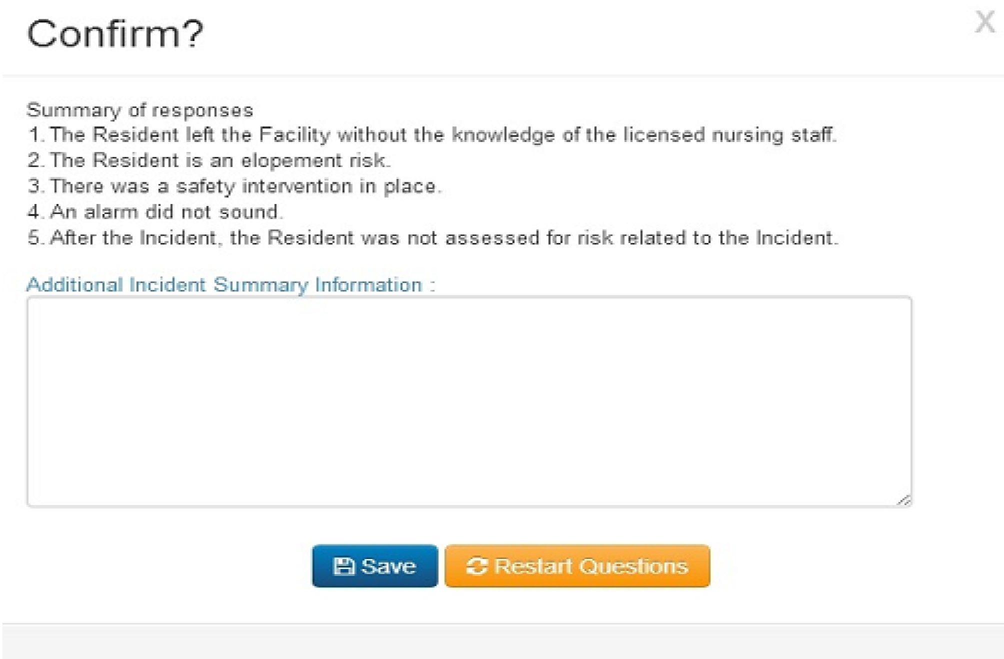
If the worker clicks **Yes**, the system closes the popup and presents the required questions pertaining to the incident.

If the worker clicks **No**, the system returns the Delete Popup **Do you want to delete this Incident? If Yes, click OK. If no, click Cancel.**

- If the worker clicks Yes to delete the duplicate record, the system deletes the record for the reason of Duplicate Entry and automatically changes the Workflow Status to INCD DEL – Draft Incident Deleted by Facility.

- If the worker clicks No, the worker is returned to the Incident Details Screen to answer the questions pertaining to the incident details.

After Incident Type questions are asked and responded to the system returns a prompt re-stating the answers provided by the worker in statement form. The system provides an optional Additional Comments box if the worker chooses to add information to be appended to the Incident Summary record. The worker then has the option to accept the responses provided and move to the next tab or restart the questions:

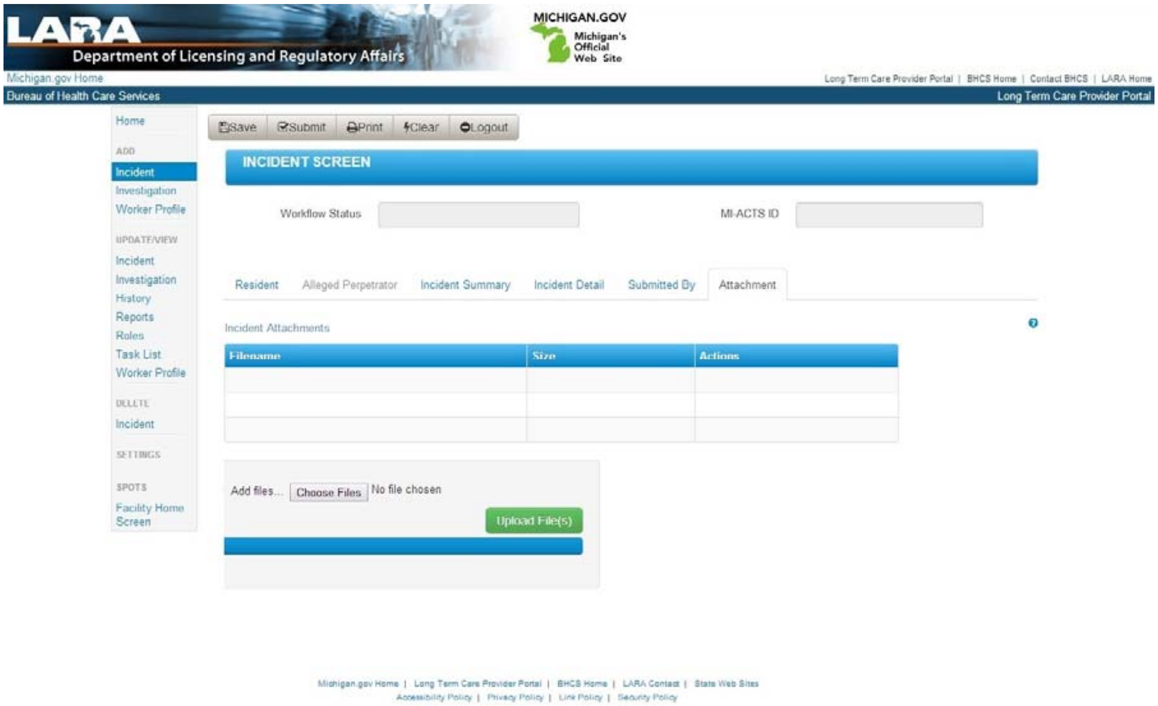


If the worker clicks the **Save** button to move to the next action, the Incident Details popup box closes and the Attachment Tab is enabled for worker entry.

If the worker clicks the **Restart Questions** button the system removes the answers to the questions provided by the worker and returns the worker to the Incident Details Tab, allowing them to select a different Incident Type, Type of Harm, etc. The questions pertaining to that Incident Type are presented when the Questions button is clicked.

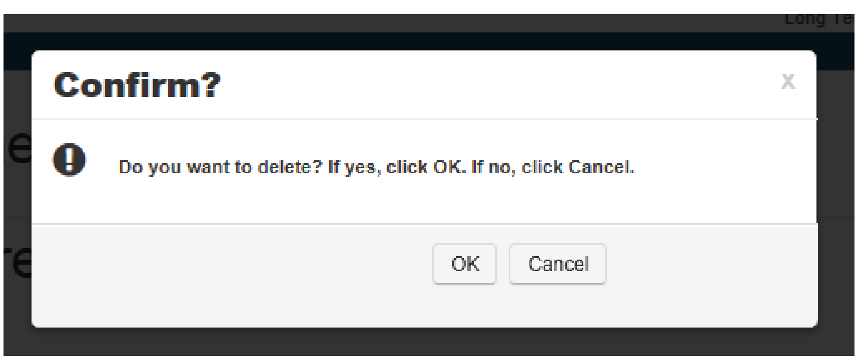
2h) Add an Incident – Attachments Tab

If the worker chooses to attach files to the incident, the worker clicks on the Attachments tab. The Attachment tab opens and the worker is able to attach files/pictures from their private or network drives to the Incident Report.



After the files are attached to the draft, the worker may delete the attached files prior to submitting the Incident to the SA by clicking on the delete icon in the row of the document to be deleted.

When the Delete icon in the Action Column of the Attachment Tab is clicked, the following warning message is displayed:

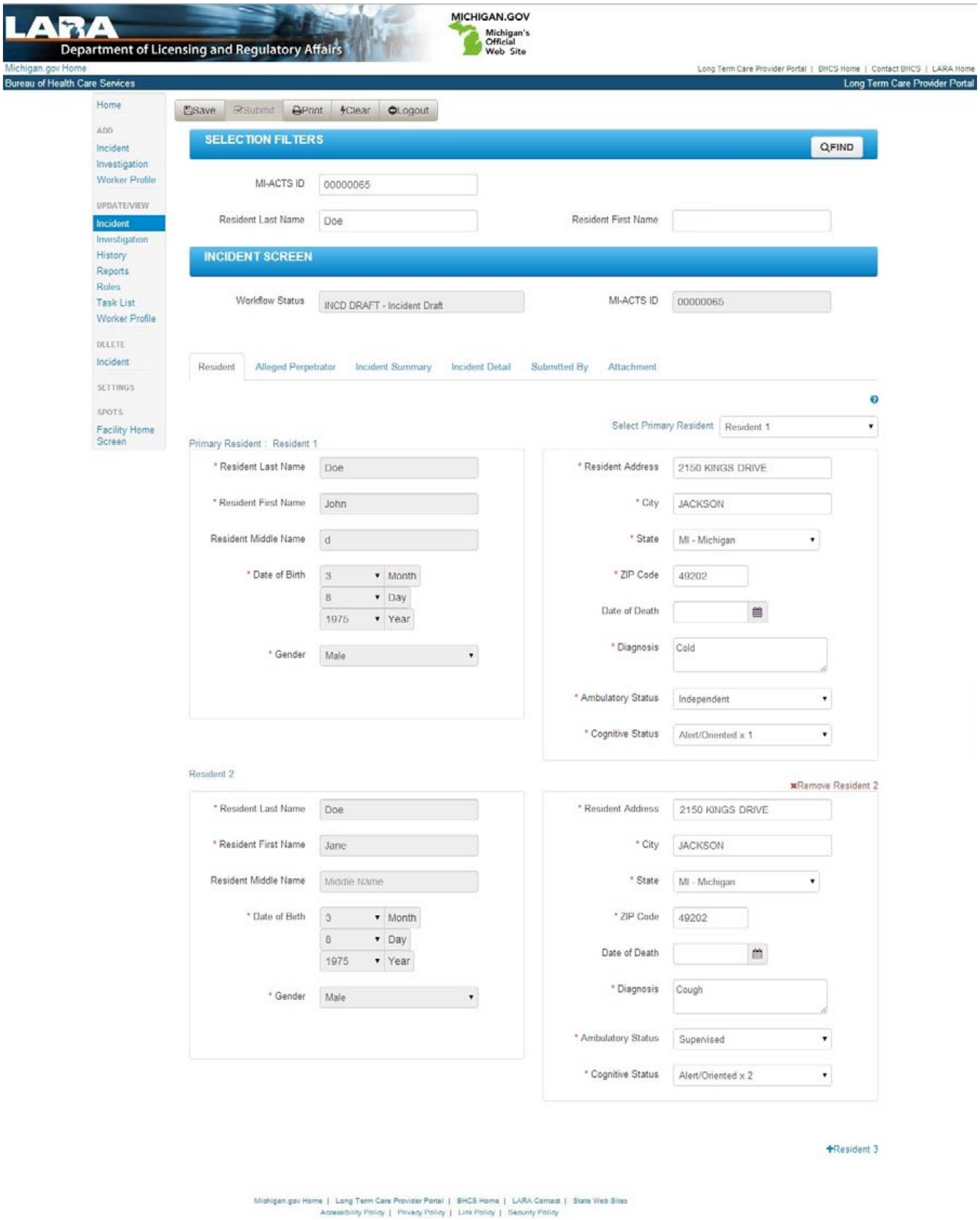


2i) Update an Incident

To update an existing incident, the incident must not have been submitted to the SA (Workflow status must be equal to *INCD DRAFT - Incident Draft)*. The Facility worker may update the incident information until the incident is submitted to the SA. Once the incident has been submitted to the SA, the incident information is locked and may not be updated. The incident information may only be viewed and/or printed after it has been submitted to the SA.

Note: *The SA cannot update information submitted by the Facility. The SA may view or print the incident information, but cannot change the information.*

If the Incident has not been submitted to the SA, the Incident may be updated by the Facility by navigating to the **Update/View** Incident screen function. The worker searches for the incident by entering the MI-ACTS ID number and/or by Resident Last Name and/or First Name in the Selection Filters section of the screen and clicking Enter on the keyboard or by clicking the **Find** button.



- If the worker enters the MI-ACTS ID, the search is for a single record that matches the MI-ACTS ID entered. If the single match is found, the system automatically populates the Incident Screen (all tabs) with the data for the incident selected. The MI-ACTS ID and Resident Last Name and First Name display in the Selection Filters.

- If the worker enters the MI-ACTS ID and the single match is found, but the Incident was previously deleted, the system returns the message **Invalid Selection: MI-ACTS Incident Previously Deleted**.

- If the worker does not type in the MI-ACTS ID and enters a Resident Last Name and First Name combination and multiple entries are returned from the sound-like search/last name/date of birth search for the Resident, the worker reviews the information to determine if the incident they want to view is in the search result grid.

    - To select the record, the worker highlights the row and clicks **OK**, or clicks anywhere in the highlighted row. The system populates the screen tabs with the data for the incident selected.
    - If the decision is made not to select a row and to close the popup, click **Cancel.** The popup screen closes and returns the worker to the pre-condition before the popup opened.

- If the worker enters the MI-ACTS ID and/or the Resident Last Name, First name and a match is not found, the system returns a **No Matching Record Found** message.

- If the worker does not include the MI-ACTS ID in the search criteria and performs the search solely by the Resident Last Name and First Name and only one incident for the Resident exists, the system populates the screen tab sections with the data for the incident selected and does not display the results popup.

- If the worker does not include the MI-ACTS ID in the search criteria and performs the search solely by the Resident Last Name and First Name and multiple incidents for the name match exist, the system populates the results in the search results popup.

- The worker may update the information entered in the tab sections of the Incident screen if their Role allows update capabilities.

The worker updates the tabs/field(s) on the Incident Screen as necessary and clicks **Save** on the tool bar. The incident may remain saved after all required data for the incident is saved. The Task List screen for the Facility reminds the workers at that Facility that the incident has been drafted but not submitted to the SA. More detail on the Task List screen is provided in Chapter 2w.

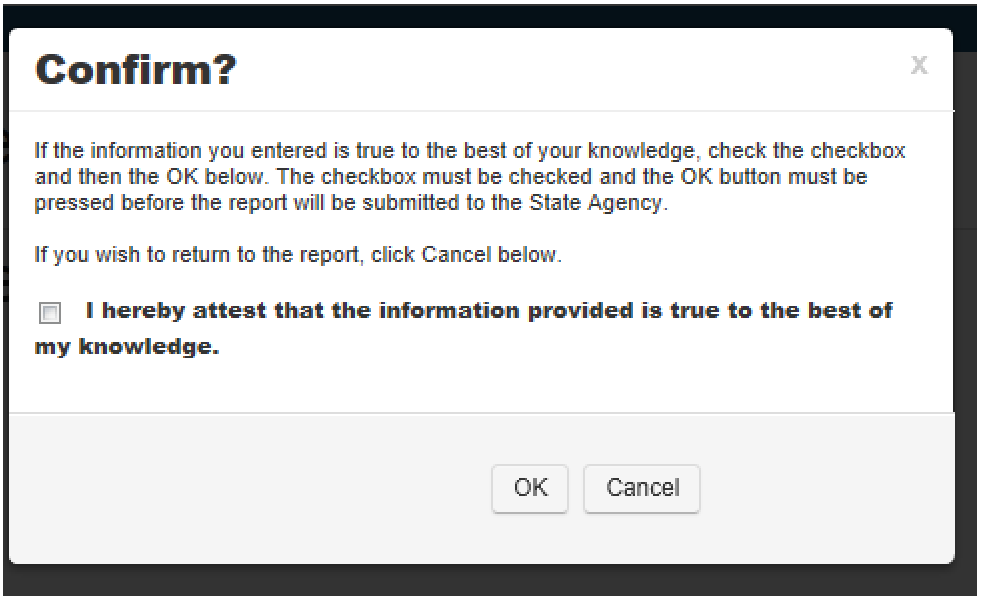
2j) Add or Update an Incident – Save and Submit

After entering all required fields on all required tabs, the worker selects Save from the tool bar at the top of the screen.

The Task List screen for the Facility reminds the workers at that Facility that the incident has been drafted but not submitted to the SA. More detail on the Task List screen is provided in Chapter 2w.

To submit the Incident to the SA, the worker clicks the **Submit** icon from the tool bar after all required fields are entered and all tabs are saved.

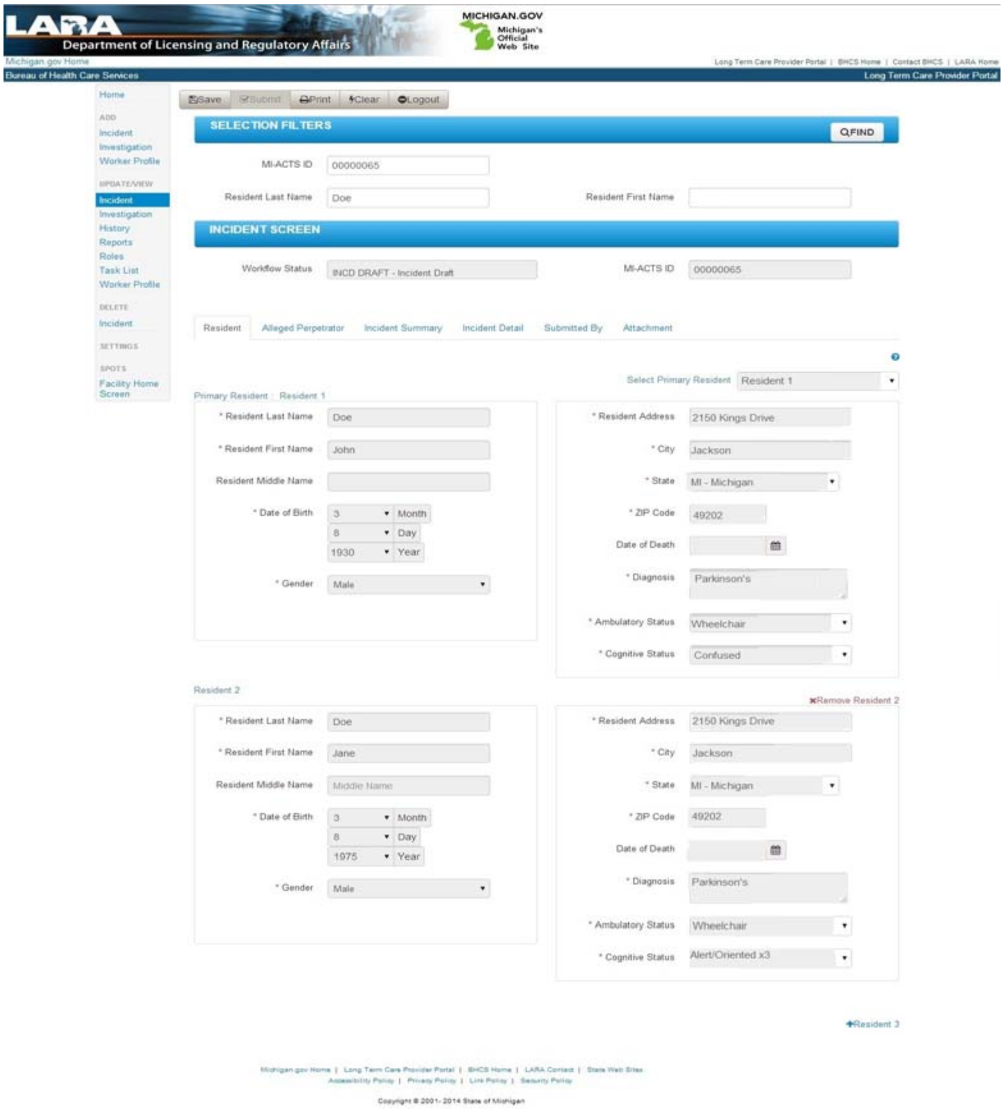
- The system returns an Affidavit popup for the Facility worker to affirm by checking a checkbox and the **OK** button on the popup to submit the incident, or clicking the **Cancel** button to remain in Draft format and not submit to the SA.
    - The worker must check both the checkbox and click the **OK** button before the incident is submitted to the SA.
    - If the **Cancel** button is clicked, the prompt disappears and the worker is returned to the screen as if the command to **Submit** had never been executed. The Incident Report remains in Draft format.



Note: *When the incident is successfully submitted to the SA, the workflow is automatically changed from INCD DRAFT – Incident Draft to INCD SUBMT- Incident Submitted to SA.*

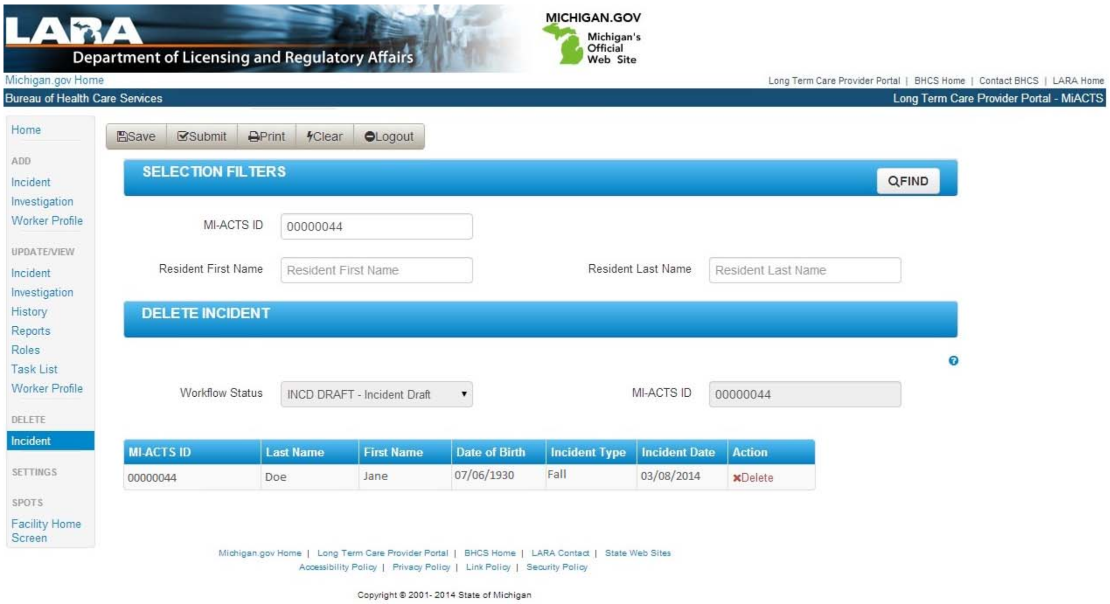
2k) View an Incident

To view an existing incident, the worker clicks on Update/View Incident screen function. After the Incident is submitted to the SA, all fields are disabled from update and are view only. The record remains written to the MI-ACTS database for retrieval at the worker's request as needed.


LARA
Department of Licensing and Regulatory Affairs
MICHIGAN.GOV
Michigan's Official Web Site
Michigan.gov Home
Long Term Care Provider Portal | BHCS Home | Contact BHCS | LARA Home
Bureau of Health Care Services
Long Term Care Provider Portal
Home
ADD
Incident
Investigation
Worker Profile
UPDATE/VIEW
Incident
Investigation
History
Reports
Roles
Task List
Worker Profile
DELETE
Incident
SETTINGS
SPOTS
Facility Home Screen
Save
Submit
Print
Clear
Logout
SELECTION FILTERS
FIND
MI-ACTS ID
00000065
Resident Last Name
Doe
Resident First Name
INCIDENT SCREEN
Workflow Status
INCD DRAFT - Incident Draft
MI-ACTS ID
00000065
Resident
Alleged Perpetrator
Incident Summary
Incident Detail
Submitted By
Attachment
Select Primary Resident
Resident 1
Primary Resident : Resident 1
* Resident Last Name
Doe
* Resident First Name
John
Resident Middle Name
* Date of Birth
3
Month
8
Day
1930
Year
* Gender
Male
* Resident Address
2150 Kings Drive
* City
Jackson
* State
MI - Michigan
* ZIP Code
49202
Date of Death
* Diagnosis
Parkinson's
* Ambulatory Status
Wheelchair
* Cognitive Status
Confused
Resident 2
Remove Resident 2
* Resident Last Name
Doe
* Resident First Name
Jane
Resident Middle Name
Middle Name
* Date of Birth
3
Month
8
Day
1975
Year
* Gender
Male
* Resident Address
2150 Kings Drive
* City
Jackson
* State
MI - Michigan
* ZIP Code
49202
Date of Death
* Diagnosis
Parkinson's
* Ambulatory Status
Wheelchair
* Cognitive Status
Alert/Oriented x3
Resident 3
Michigan.gov Home | Long Term Care Provider Portal | BHCS Home | LARA Contact | State Web Sites
Accessibility Policy | Privacy Policy | Link Policy | Security Policy
Copyright © 2001-2014 State of Michigan

2l) Delete an Incident

To delete an existing incident, the incident must not have been submitted to the SA (Workflow status must be equal to *INCD DRAFT - Incident Draft)*. The authorized Facility worker (controlled by a Role assignment) may delete the incident until the incident is submitted to the SA. Once the incident has been submitted to the SA, the incident information is locked and may not be deleted. Once the incident is deleted, it is no longer able to be viewed and/or printed.

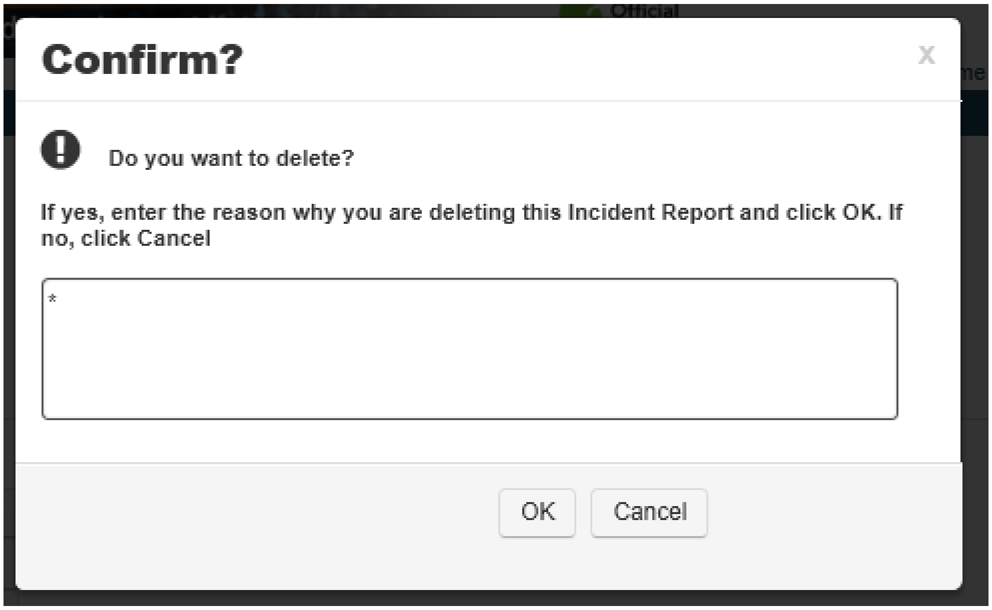


To delete an existing Draft Incident, the authorized worker navigates to the **Delete Incident** screen function. The worker searches for the incident by entering the MI-ACT ID number and/or by Resident Last Name and First Name in the Selection Filters section of the screen and clicks the **Find** button.

- If the Facility worker enters the MI-ACTS ID and a match is found, the single incident displays in the grid (with the MI-ACTS ID and Resident Last Name Resident First Name displaying in the Selection Filters).
- If the worker types a Resident Name in the Selection Filter section to search by and a single match is found, the single incident information displays in the grid (with the MI-ACTS ID and Resident Last Name Resident First Name displaying in the Selection Filters).
- If multiple entries exist for the Resident Name, information for the multiple incidents display in the grid.

If Incident was previously deleted, the system returns the Invalid Selection: MI-ACTS Incident Previously Deleted message.

The worker clicks the **Delete** icon from the Action column in the row. The system displays the following warning message:



If the worker is deleting the Draft Incident Report, the worker is required to enter a note as to why the Draft Incident is being deleted, prior to clicking **OK**. If the worker clicks **OK** prior to entering the required Reason, the system displays the text box in red and provides the **Enter Required Field** message.

If the worker enters the required reason and clicks the OK button, the Workflow Status is automatically updated to INCD DEL – Draft Incident Deleted by Facility and the information is no longer viewable to the worker.

If the worker clicks Cancel, the system returns the worker to the Delete Incident screen function, just as if the Delete icon was never clicked.

2m) Investigation Screen

The Investigation Screen replicates the information on Michigan's current 5-Day Investigation (363) Report and has new fields pertaining to the Resident's ambulatory status, cognitive status, and activity at the time of the incident. These new statuses are to be considered at the time of the incident and not as of the last assessment.

Upon navigation to the Investigation screen, the worker may add a new investigation report, modify an existing investigation report, or view an existing investigation report.

Once the investigation report is created and submitted to the SA, the data for the investigation report is locked and may not be modified; the Investigation screen may only be viewed and a report of the incident and investigation may be printed

The Investigation screen displays eight individual tab sections*, of which the Facility worker is required to enter, update, or confirm information on five prior to submitting the Investigation Report to the SA.

> **Note:** *Workers using the Firefox browser may see tabs that do not appear to be enabled, but the worker can click on the tab to open.*

The five required tabs are:

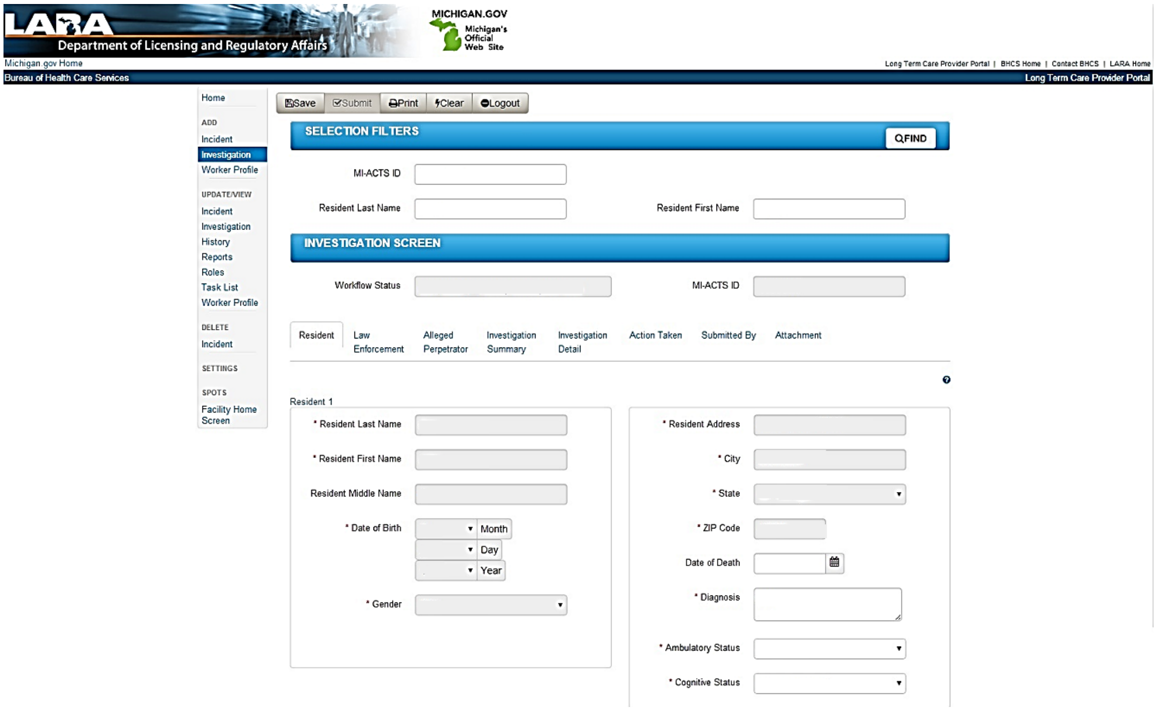
- Resident
- Investigation Summary
- Investigation Detail
- Actions Taken
- Reported By (automatically completed by the system upon Submitting Investigation to SA)

The three optional tabs to be completed by the Facility are:

- Law Enforcement
- Alleged Perpetrator
- Attachment

After the Investigation Report is received by the SA, the SA reviews the information for Immediate Jeopardy triage.

2n) Add Investigation Report



To enter a new investigation report, the Facility worker navigates to the Investigation screen and clicks the Add Investigation screen function. The Incident must have been submitted to the SA (Workflow Status equals INCD SBMT – Incident Submitted to SA) before the Investigation may be started.

The worker enters the MI-ACTS ID and/or the Resident Last Name and/or Resident First Name in the Selection Filters and clicks the **Find** button. The system populates the Resident Tab, the Alleged Perpetrator Tab, the Investigation Summary, the Investigation Detail Tab and the Attachment Tab on the Investigation screen with the information submitted in the Incident Report. The worker may add additional Residents and may change some of the information pertaining to the Residents submitted with the Incident Report. The Resident Address, Date of Death, Diagnosis, Ambulatory Status and Cognitive Status of existing Residents may be updated in the Resident Tab. The Resident Name, Date of Birth and Gender for Residents submitted with the Incident are locked for update in the Investigation Report. The worker may update the information in any other tab until the Investigation Report is submitted to the SA.

There are two new tabs for the Facility Worker to complete as part of the Investigation:

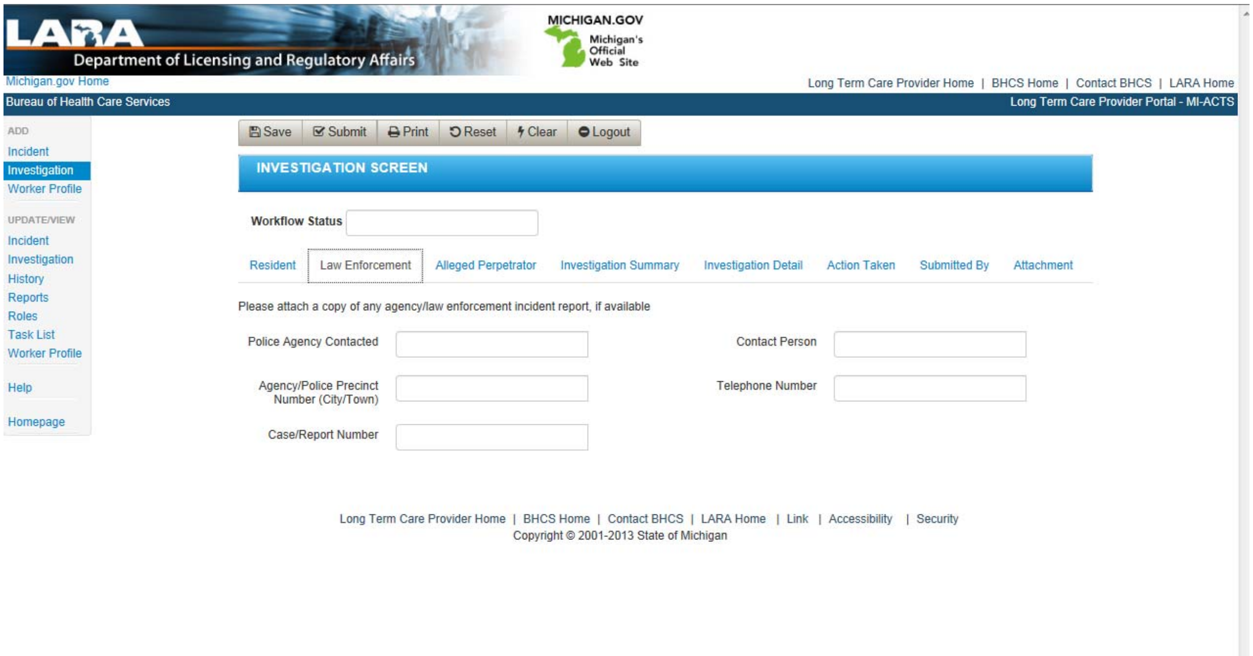
- Law Enforcement tab provides information pertaining to the law enforcement agency, if the police were contact.

- Action Taken tab provides a text pad for the worker to enter or upload information pertaining to the action taken by the Facility after the incident occurred.

Each individual tab must be completed and saved before the worker can successfully navigate to the next tab. To save the Investigation Report Draft to return at a later time to continue to work, the worker clicks the **Save** icon**.** To return to work on the draft, the Facility worker clicks the Update/View Investigation screen function and enters the MI-ACTS ID or the Resident Last Name and/or First Name to search for the incident.

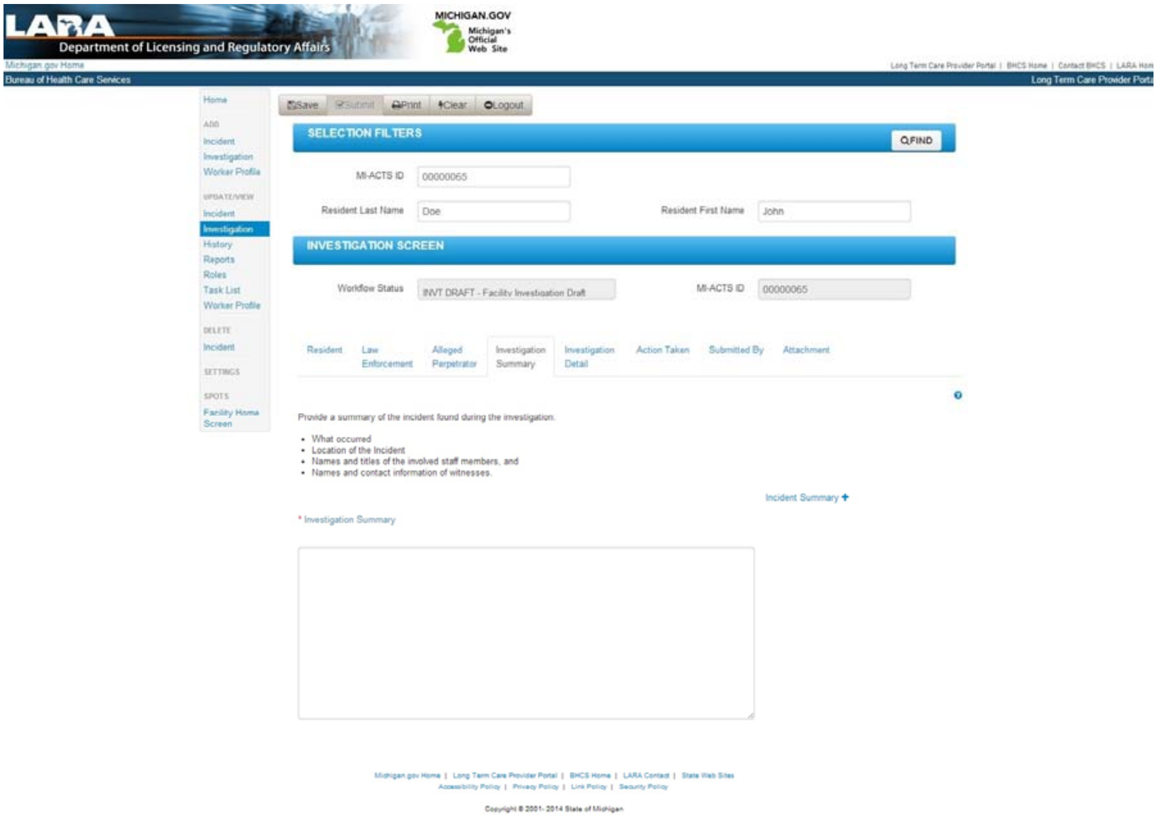
Note: *When the worker selects Add Investigation from the left navigation panel, or navigates to the Add Investigation screen from Task List and the MI-ACTS is entered, the the facility's workflow status changes from: INCD SUBMT- Incident Report Submitted to SA to INVT DRAFT – Facility Investigation Draft.*

2o) Add Investigation – Law Enforcement Tab



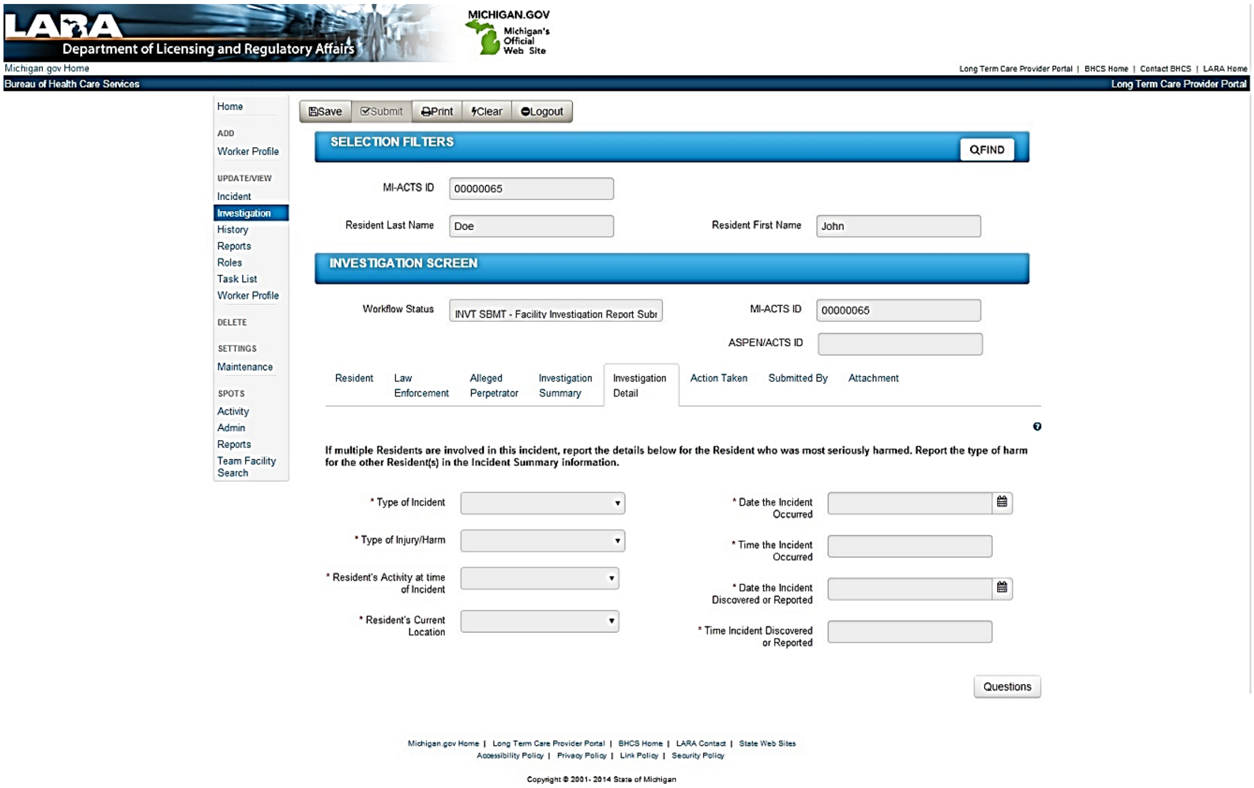
Complete the Law Enforcement tab if law enforcement was contacted in relation to the incident. All fields in the tab are optionally entered; no fields are required to be entered to submit the Investigation to the SA.

2p) Add Investigation – Investigation Summary Tab



The Summary information submitted with the Incident Report may be viewed by clicking the Incident Summary icon to the right of the screen. The information submitted with the Incident cannot be altered, however, the information for the Investigation Summary is required to be entered in the notepad.

2q) Add Investigation – Investigation Detail Tab



The Investigation Detail tab is pre-populated with the information entered on the Incident Detail tab when the incident was submitted.

The worker may update the information on this tab, based on the results of the investigation. If the Type of Incident is changed, the system requires the questions be answered for the new Incident.

After Incident Type questions are asked and responded to the system returns a pop-up re-stating the answers provided by the worker in statement form. The system provides an optional Additional Comments box if the worker chooses to add information to be appended to the Incident Summary record. The worker then has the option to accept the responses provided and move to the next tab or restart the questions:

X

Confirm?

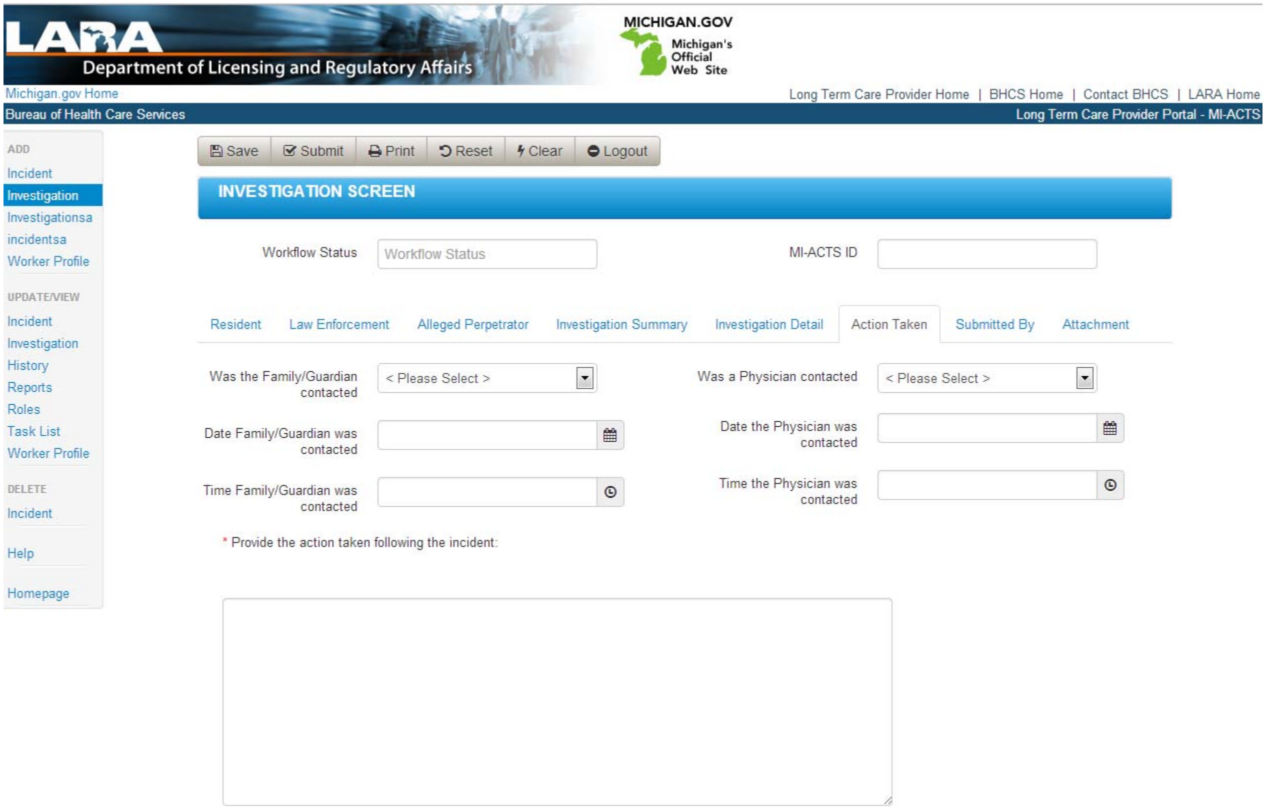
Summary of responses

1. The Resident left the Facility without the knowledge of the licensed nursing staff.
2. The Resident is an elopement risk.
3. There was a safety intervention in place.
4. An alarm did not sound.
5. After the Incident, the Resident was not assessed for risk related to the Incident.

Additional Incident Summary Information :

Save | Restart Questions

2r) Add Investigation – Action Taken Tab

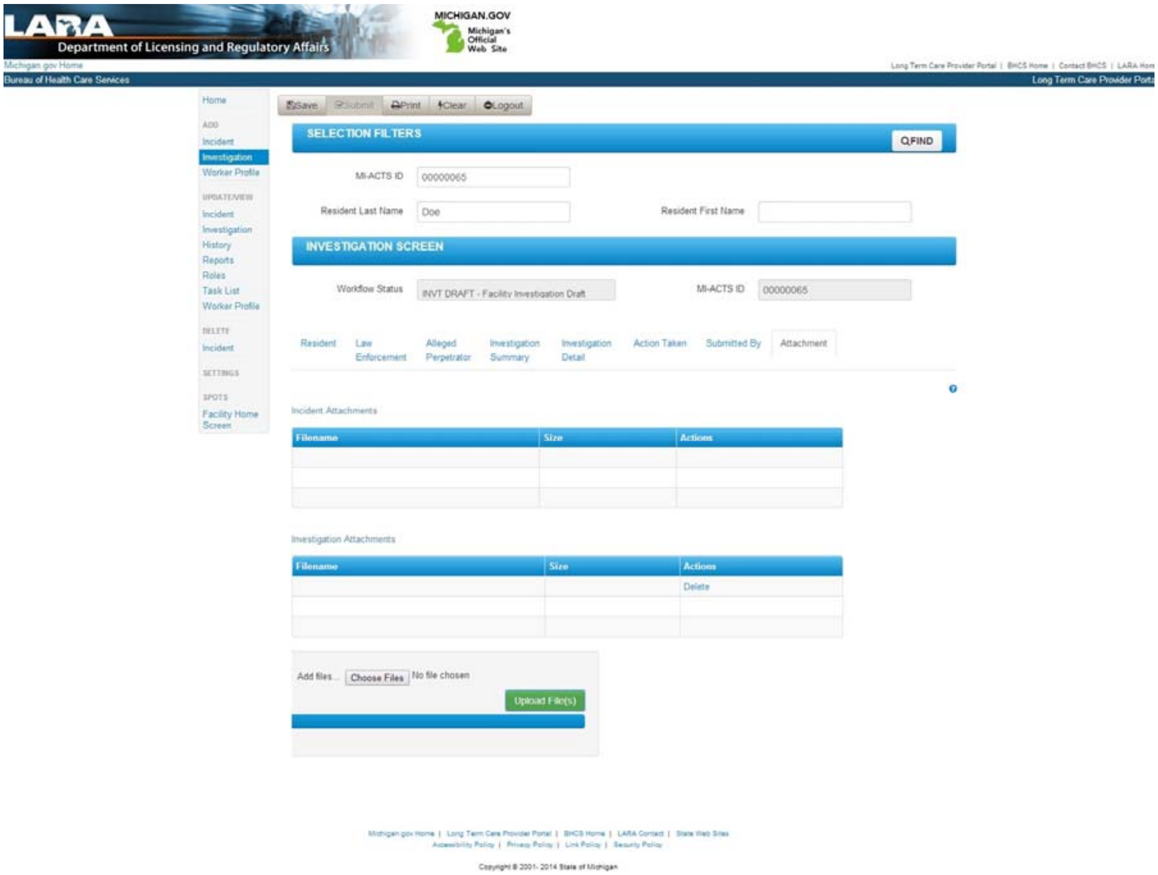


The Action Taken tab provides a *text pad for the worker to enter information pertaining to the action taken by the Facility after the incident occurred.

- If the answer to **Was Family/Guardian contacted?** Is **Yes**, the Date and Time fields pertaining to the Family/Guardian contact become required fields.
- If the answer to **Was a physician contacted?** is **Yes**, the Date and Time fields pertaining to the Physician contact become required fields.

2s) Add Investigation – Attachment Tab

If the worker chooses to attach files to the incident, the worker clicks on the Attachments tab. The Attachment tab opens and the worker is able to attach files from their private or network drives to the Incident Report.



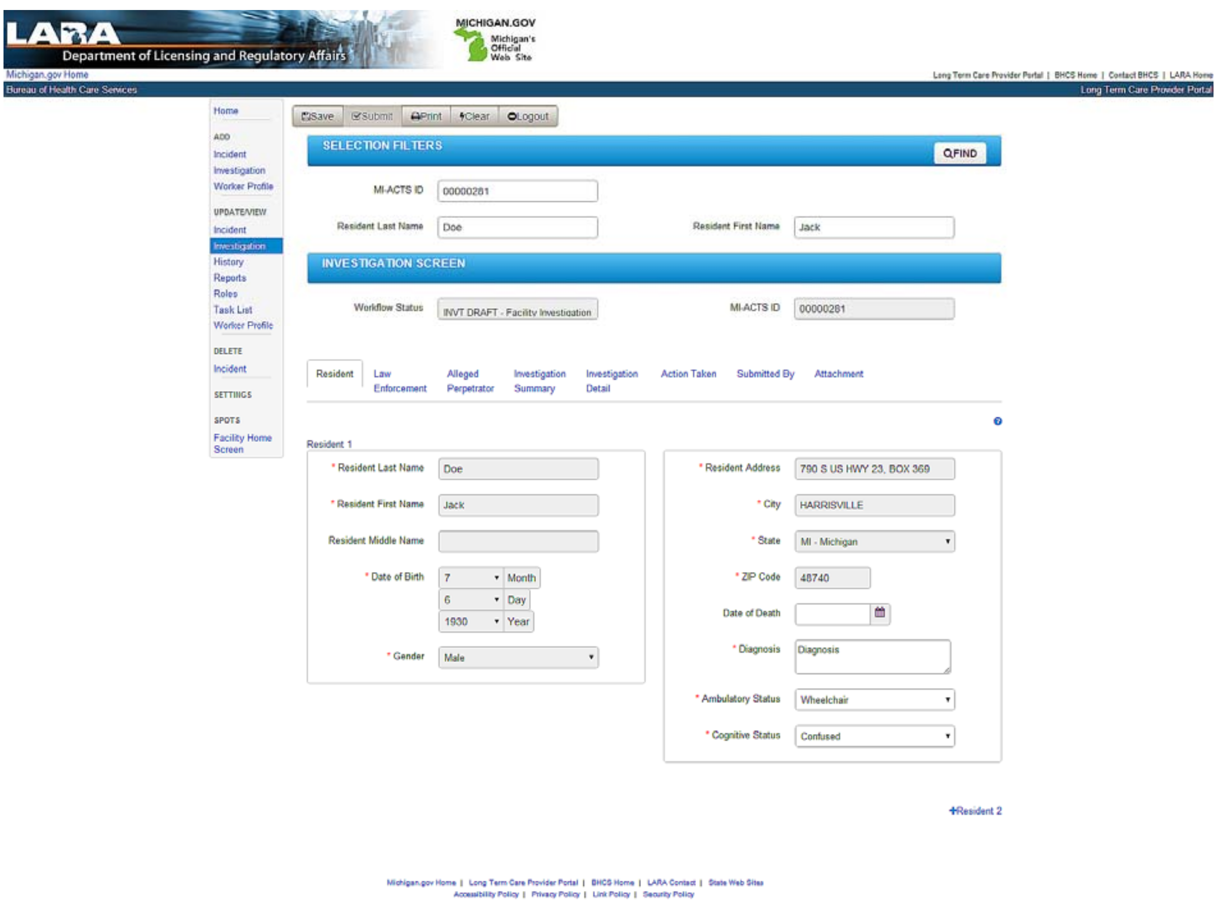
After the files are attached to the draft investigation, the worker may delete the attached files prior to submitting the Investigation to the SA by clicking on the delete icon in the row of the document to be deleted. Attachments that were submitted with the incident report cannot be deleted during the investigation.

2t) Update an Investigation

To update an existing investigation, the investigation must not have been submitted to the SA (Workflow status must be equal to *INVT DRAFT – Investigation Draft)*. The Facility worker may update the investigation information until the investigation is submitted to the SA. Once the investigation has been submitted to the SA, the investigation information is locked and may not be updated. The investigation information may only be viewed and/or printed after it has been submitted to the SA.

Note: *The SA cannot see Investigation information until the Facility submits the Investigation to the SA. The SA cannot update information submitted by the Facility. The SA may view or print the investigation information, but cannot change the information.*

If the Investigation has not been submitted to the SA, the Investigation may be updated by the Facility by navigating to the **Update/View** Investigation screen function. The worker searches for the incident by entering the MI-ACTS ID number and/or by Resident Last Name and/or First Name in the Selection Filters section of the screen and clicking Enter on the keyboard or by clicking the **Find** button.



- If the worker enters the MI-ACTS ID, the search is for a single record that matches the MI-ACTS ID entered. If the single match is found, the system automatically populates the Incident Screen (all tabs) with the data for the incident selected. The MI-ACTS ID and Resident Last Name and First Name display in the Selection Filters.

- If the worker enters the MI-ACTS ID and the single match is found, but the Incident was previously deleted, the system returns the message **Invalid Selection: MI-ACTS Incident Previously Deleted**.

- If the worker does not type in the MI-ACTS ID and enters a Resident Last Name and First Name combination and multiple entries are returned from the sound-like search/last name/date of birth search for the Resident, the worker reviews the information to determine if the incident they want to view is in the search result grid.

    - To select the record, the worker highlights the row and clicks **OK**, or clicks anywhere in the highlighted row. The system populates the screen tabs with the data for the incident selected.
    - If the decision is made not to select a row and to close the popup, click **Cancel.** The popup screen closes and returns the worker to the pre-condition before the popup opened.

- If the worker enters the MI-ACTS ID and/or the Resident Last Name, First name and a match is not found, the system returns a **No Matching Record Found** message.

- If the worker does not include the MI-ACTS ID in the search criteria and performs the search solely by the Resident Last Name and First Name and only one incident for the Resident exists, the system populates the screen tab sections with the data for the incident selected and does not display the results popup.

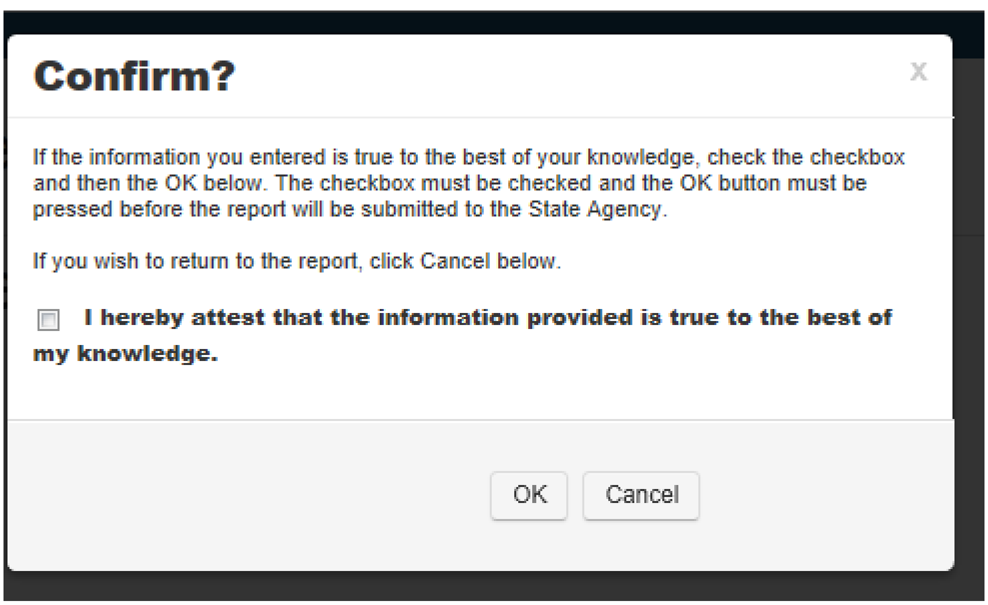
- If the worker does not include the MI-ACTS ID in the search criteria and performs the search solely by the Resident Last Name and First Name and multiple incidents for the name match exist, the system populates the results in the search results popup.

- The worker may update the information entered in the tab sections of the Incident screen if their Role allows update capabilities.

The worker updates the tabs/field(s) on the Incident Screen as necessary and clicks **Save** on the tool bar. The incident may remain saved after all required data for the incident is saved. The Task List screen for the Facility reminds the workers at that Facility that the incident has been drafted but not submitted to the SA. More detail on the Task List screen is provided in chapter 2w.

2u) Add or Update Investigation – Submit to SA

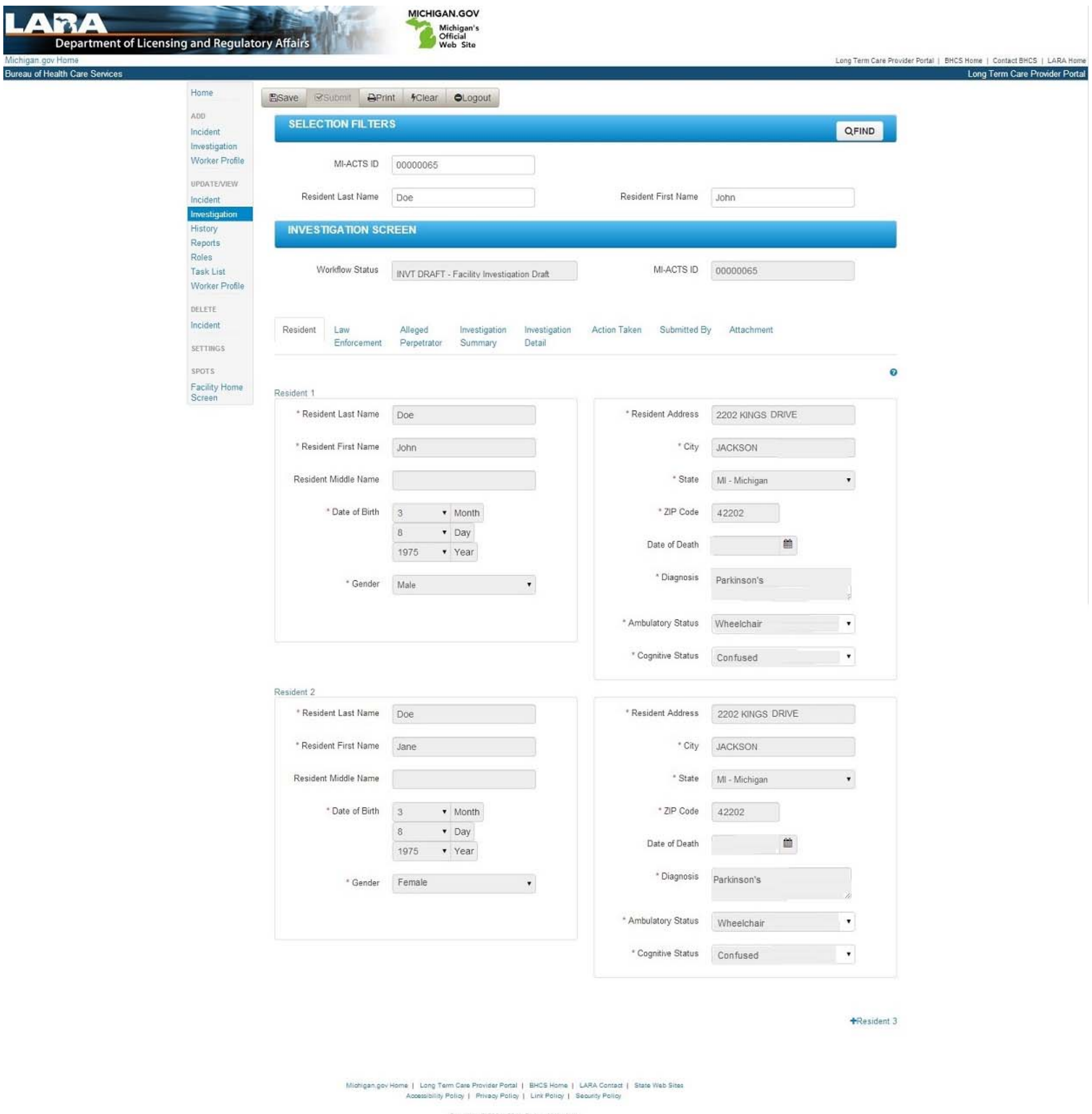
To submit the investigation report to the SA, the Facility worker selects the **Submit** icon from the tool bar. The system returns an Affidavit popup for the Facility worker to affirm by checking a checkbox and the clicking the **OK** button on the popup. The worker must check both the checkbox and click the **OK** button before the Investigation Report is submitted to the SA. If the **Cancel** button is clicked, the prompt disappears and the worker is returned to the screen as if the command to **Submit** had never been executed.



Note: *When the Investigation Draft is submitted, the workflow status changes from: INVT DRAFT – Facility Investigation Draft to INVT SBMT - Facility Investigation Report Submitted.*

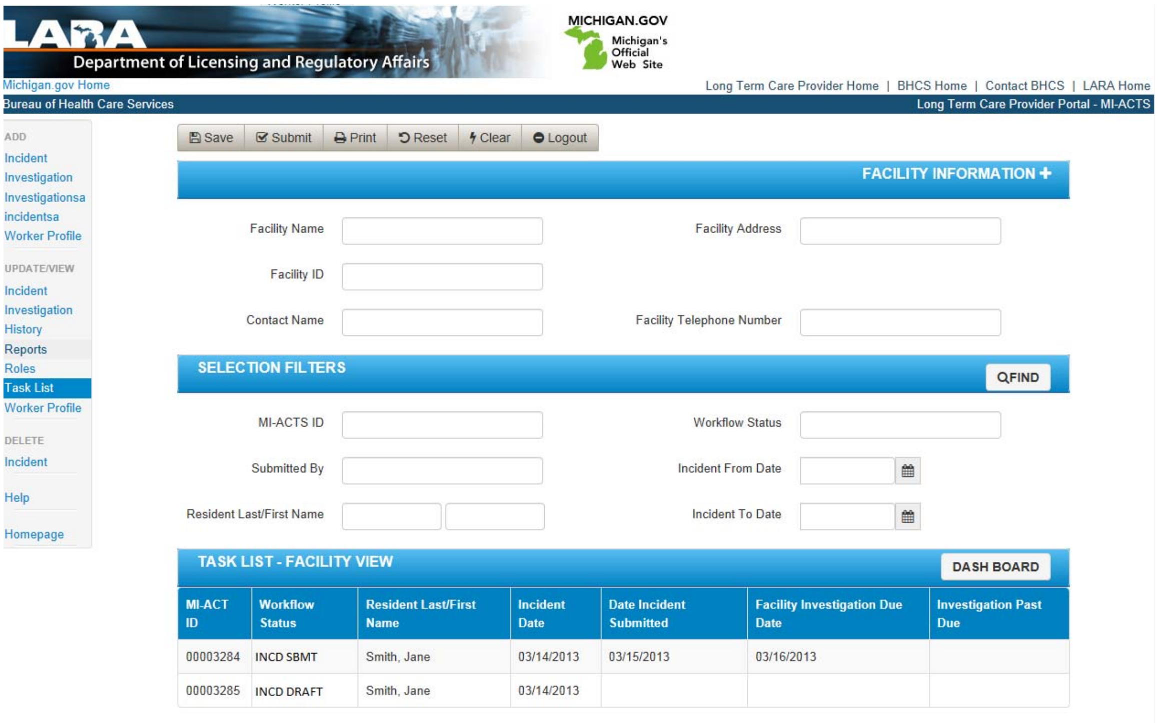
2v) View Investigation

To view an existing investigation, the worker clicks on Update/View Investigation screen function. After the Investigation is submitted to the SA, all fields on all tabs are disabled from update and are view only. Previously submitted records remain written to the MI-ACTS database for retrieval at the worker's request as needed.



2w) Task List Screen

The Facility View of the Task List screen alerts the Facility of tasks requiring the Facility take the next action required to submit the Incident and Investigation Reports. The task sort displays the oldest task displaying on the top row of the grid, but may be changed by selecting filters or clicking on the column heading of the grid.



By default, the system automatically populates All Tasks to display in the grid section of the screen. The default display sort is by the Date the Incident Occurred, with the oldest date displaying first in the grid.

To reduce the number of tasks displaying in the grid to a specific grouping of tasks, the worker uses the Selection Filters section of the screen.

Example: *To review only the Incidents with the workflow status equal to Incident Draft, select INCD DRAFT – Incident Draft from the drop down of the Workflow Status field in the Selection Filters section of the screen and press the Enter key on your keyboard or click the* ***Find*** *button. The Incidents in the current workflow status of INCD DRAFT – Incident Draft display in the grid.*

If no tasks exist with the default or filtered information, a **No Matching Records Found** message displays.

Following are the filters for the Facility Task List:

- To inquire by a single MI-ACTS ID, the worker must enter the MI-ACTS ID in the MI-ACTS Incident ID field and click the **Find** button. If an incident matches with the MI-ACTS, information for that single incident displays in the grid section of the Task List screen.

- To inquire by the Facility Staff who submitted the Incident, enter the Staff Worker's Last and/or First Name and click the **Find** button. All incidents submitted by this staff member which now require a next action display in the grid section of the Task List screen.

- To inquire by a Resident Name, the worker must enter the Resident Last Name and/or First Name in the Resident Last/First Name fields and click the **Find** button. If one or more incidents exist for the Resident name, the incidents display in the grid section of the Task List screen.

- To inquire by a Workflow Status, the worker must select the status from the drop down values and click the **Find** button. If one or more incidents match the workflow status selected, the incidents display in the grid section of the Task List screen.

- To inquire by a date range of Incident Dates, the worker must enter or select dates in the Incident From Date and Incident To Date fields.

Multiple filters may be combined to further filter the incidents requiring an action. For example, to inquire by the Resident Name within a specified date, the worker must enter the Resident Last/First Names, the Incident From and To Dates and click the Find button. If one or more incidents match the information entered, the incidents matching the specific filter display in the grid section of the screen for the worker to select from. If no incident is found requiring action, the system displays a **No Matching Records Found** message.

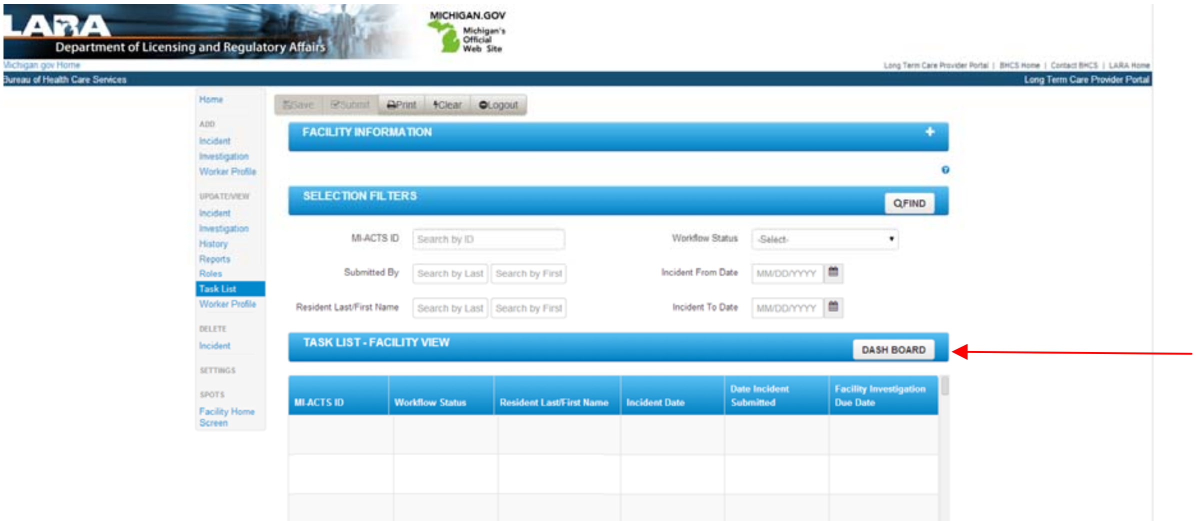
When the worker clicks on an incident/investigation displayed in the grid section of the screen, the system takes the worker to the screen to perform the next required action:

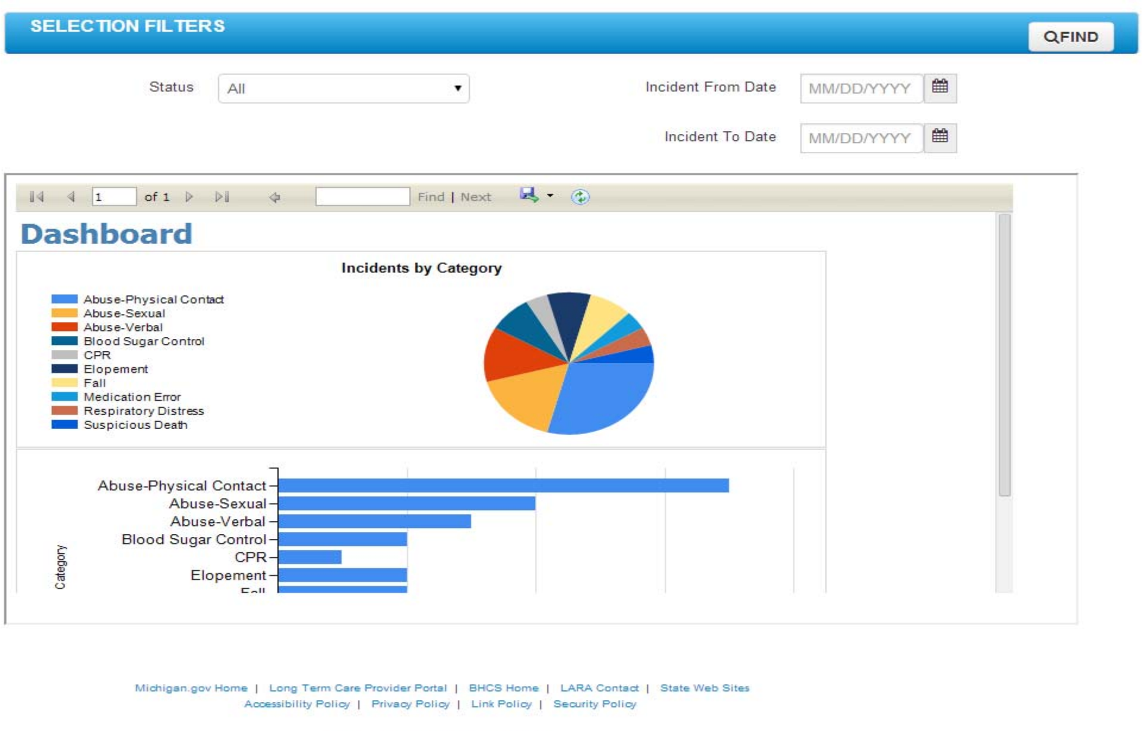
- If the Workflow Status is INCD Draft – Incident Draft, the system opens the Incident Report for the worker to update the Incident Report. The worker saves the changes and either submits the report to the SA or leaves the record in draft status for the Facility to complete and submit.

- If the Workflow Status is INCD SBMT – Incident Submitted to SA, the next step is for the Facility to Add the Investigation Report.

- If the Workflow Status is INVT Draft – Investigation Draft, the next step is for the Facility to complete and submit the Investigation Report.

Clicking the **Dashboard** button on the Task List screen opens a graphic for a quick glance on the percentages by Incident Type/Category for the Facility. The Facility can filter on the graphic to be displayed for all open and closed Incidents, and by a date range. Leaving the fields blank produces a graphic of All incidents for the Facility. Clicking on the **Dashboard** button again closes the Dashboard.





The Dashboard provides graphics depicting the percentage and count of each Incident Type reported for the facility, team or region selected by the authorized worker.

- The following rules are followed when calculating the formula to display the graphic:

    - Only Incidents Types, once the Incident has been submitted to the SA are depicted in the graphics. Draft Incidents, Draft Investigations and Deleted Incidents are not included in the graphic.

    - The Type of Incident reported in the graphic may change from what was submitted in the Incident Report and the Investigation Report. If both the Incident and Investigation Reports are submitted to the SA, MI-ACTS uses the type of Incident reported in the Investigation Report. If the Investigation Report has not been submitted to the SA, MI-ACTS uses the type of Incident submitted in the Incident Report to calculate the graphic.

    - When the worker leaves all fields blank in the Selection Filters section, the default Incident type graphic displays:

        - All Incident Types submitted where the Workflow Status is equal to Open and Closed Incidents and the Submit Date to SA is within the last month. The Facility Dashboard displays Incidents submitted from the Facility of the logged in worker.

            - *Open Workflow Statuses for the Facility's Dashboard are:*

                - INCD SBMT – Incident Submitted to SA
                - INVT SBMT - Facility Investigation Submitted to SA

            - Closed Workflow Statuses:

                - CLOSED SA – Incident Closed by SA
                - CLOSED AA – Incident Closed in ASPEN/ACTS

- The workers may accept the default of leaving all fields blank in the Selection Filters, or may enter/select filters to modify the information returned in the graphics:

    - The Facility can enter the From Date and To Date and click the Find button to produce the graphic depicting all Open and Closed Incidents on or between the From Date and the To Date specified.

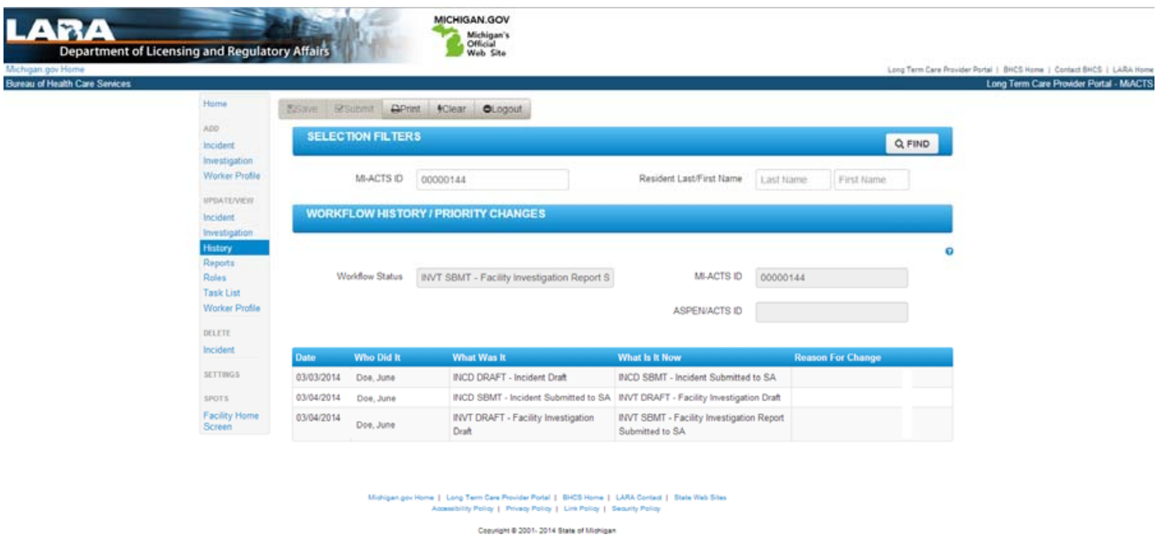
    - The Facility can enter the Status of Open and click the Find button to produce the graphic depicting all Incidents that do not have a Closed Status.

2x) History Screen

The MI-ACTS History Screen provides the history of changes to workflow status. The system defaults to the open Workflow Tab.

Each time the Incident Report and/or Investigation Report is advanced to the next activity, the workflow status changes. The worker accesses this tab to view historical dates for the MI-ACTS case. The MI-ACTS Workflow Values are:

- INCD DRAFT – Incident Draft
- INCD DEL – Incident Deleted
- INCD SUBMT- Incident Report Submitted to SA
- INVT DRAFT – Facility Investigation Draft
- CLOSED SA – Incident Closed by SA
- CLOSED AA – Incident Closed in ASPEN/ACTS



When the View History screen function is selected, the worker may search for the incident by MI-ACTS ID number and/or by Resident Last Name and/or First Name. If the worker types in a Resident Name in the Selection Filter section and multiple entries exist for the Resident Name, the following popup opens for the worker to select the incident.

- The popup screen includes the MI-ACTS ID, the Resident name and date of birth, the Incident Date and the Incident Type. To select the record, the worker highlights the row and clicks **OK**, or double clicks in the highlighted row. The search for the Facility is limited to incidents that occurred within their facility only. The system populates the screen tabs with the data for the incident selected. If the decision is made not to select a row and to close the popup, click **Cancel.** The popup screen closes and returns the worker to the pre-condition before the popup opened.

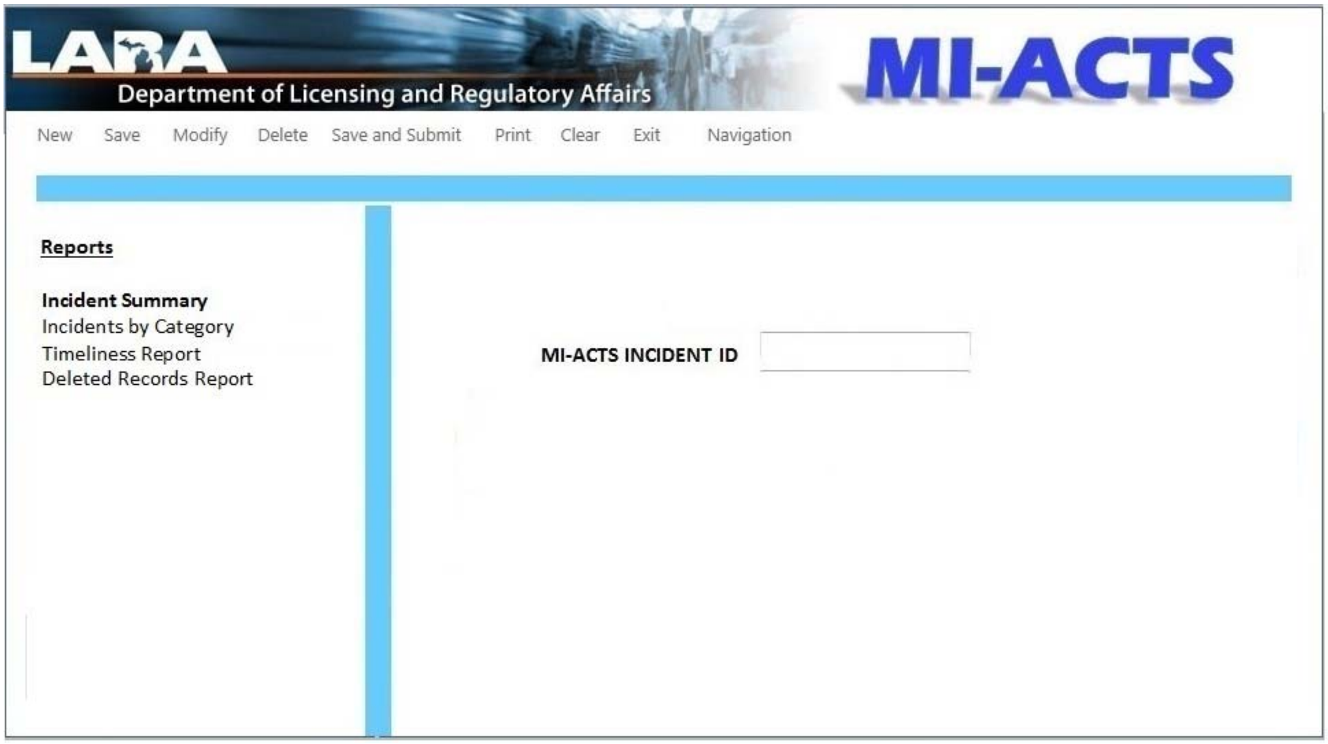
2w) Reporting Screens

The Report Selection screen allows the worker to select from a menu of reports. The views displayed on the screen are unique to the role assigned to the worker in MI-ACTS.

Based on the report selected, specific selection fields are presented:

- Incident Summary: MI-ACTS Incident Number
- Incidents by Category: Category, Date range (Start Date, End Date), Time of Day, Resident Last Name, Resident First Name (user may enter partial names)
- Timeliness of Reporting: Date range (Start Date, End Date), Staff name
- Deleted Records Report: Date Range (Start Date, End Date)

The worker may enter any of the presented filters or leave them blank (the Incident Summary requires the Incident ID field to be entered). When the user selects “Generate Report”, a new window displays the report. Once displayed, the report can be printed by selecting the printer icon or exported to a file by selecting the file folder icon.


LARA
Department of Licensing and Regulatory Affairs
MI-ACTS
New Save Modify Delete Save and Submit Print Clear Exit Navigation
Reports
Incident Summary
Incidents by Category
Timeliness Report
Deleted Records Report
MI-ACTS INCIDENT ID

Incident Summary Report

1 of 1 100% Find | Next

INCIDENT DETAIL			
INCIDENT ID:			
RESIDENT INFORMATION			
Name:	DOB:	Gender:	Type of Injury/Harm:
Last Known Address: (including room number)			
Diagnosis:			
Was the resident injured in the incident? ☐ No ☐ Yes *If YES, Injury Type from drop-down selection*			
Resident's current location: *From Drop-down selection*			
When did it occur?			
Date: / /	Time:	Date Discovered:	Date Entered into MI-ACTS:
Summary of incident			
INFORMATION ABOUT ALLEGED PERPETRATOR/INVOLVED STAFF PERSON			
Name:	Date of Birth (Mo./Day/Yr.): / /		State License Number/Michigan Registry Number (if applicable):
Position/Title (at time of incident):			Daytime Telephone Number and Hours Available: ( )
Mailing Address:			
AGENCY/LAW ENFORCEMENT INVOLVEMENT			
Agency contacted about this matter. ☐ Attorney General ☐ Police Agency ☐ Family/Guardian			
Agency/Police Precinct Number (City/Town)	Case Number:		
Contact Person:	Telephone Number: ( )		
FACILITY INVESTIGATION SUMMARY			
Action taken by facility			
QUESTIONS AND RESPONSES			

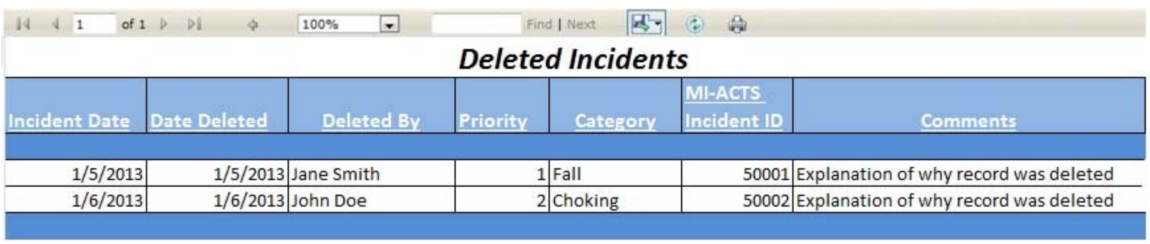
1 of 1 100% Find | Next

Incidents by Category Report

Category	Incident Date	Resident name	Report Date	Injury	Injury Category	Death
Fall						
	1/1/2013	Jones, Becky	1/2/2013	No		No
	1/2/2013	Smith, John	1/5/2103	No		No
	1/5/2013	Henry, Mary	1/8/2013	No		No
Total Fall	**3**	**Total Injuries**		**0**		**0**
Choking						
	1/1/2013	Jones, Chris	1/2/2013	Yes	Laceration	No
	1/2/2013	Smith, Kris	1/5/2103	No		No
	1/5/2013	Henry, Megan	1/8/2013	Yes	Fracture	No
Total Choking	**3**	**Total Injuries**		**2**		**0**
Elopement						
	1/1/2013	Jones, Nicole	1/2/2013	No		No
	1/2/2013	Smith, Mathew	1/5/2103	No		No
	1/5/2013	Henry, Morgan	1/8/2013	No		No
Total Elopement	**3**	**Total Injuries**		**0**		**0**

Facility Timeliness Report

Incident ID	Resident Name	Staff Name	Date Incident Discovered	24 HR RPT Submitted	Invest. Rpt Submitted	Days to Report	Days to Investigate
50001	Jones, Chris	Chris Jones	1/1/2013	1/2/2013	1/5/2013	1	3
50002	Jones, Becky	Becky Jones	1/2/2013	1/2/2013	1/7/2013	0	5
50003	Jones, Megan	Megan Jones	1/3/2013	1/2/2013	1/4/2013	-1	2



Deleted Incidents

Incident Date	Date Deleted	Deleted By	Priority	Category	MI-ACTS Incident ID	Comments
1/5/2013	1/5/2013	Jane Smith	1	Fall	50001	Explanation of why record was deleted
1/6/2013	1/6/2013	John Doe	2	Choking	50002	Explanation of why record was deleted