

Overview: Management Review – (Investigation Required)

ODP completes a more comprehensive, **Management Review** of the entire incident must be completed within **30 days** of the Incident First Section being submitted. The Incident Manager at the County and/or Regional level will ultimately approve or not approve the incident.

- An **Approved** status indicates that no further action is required.
- A **Not Approved** status indicates that further action is needed.

This job aid is intended to familiarize individuals having the Incident Management Reviewer role with the management review process whenever an Incident reviewer requests a Provider Certified Investigator Report.

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Management Review (Investigation Required)

The *Management Review*-related pages allow reviewers to document management review information, request a provider certified investigation, and also mark an incident report as **Approved** or **Not Approved**. If the report is approved, the incident report is closed. If the report is not approved, a new incident report final section is generated when the management review is submitted. The following example illustrates the steps for an incident report in which the incident reviewer indicated a need for a certified investigation.

NOTE: This example follows the various stages in the Management Review process for an incident, and presupposes that various roles required to perform the steps in the process are being utilized.

Step	Action																																																									
1.	<p>Locate the incident from My Dashboard or by using the Search screen functionality. In the example below, the user clicked on the hyperlinked number in the Documents Requiring My Attention panel under the Work Items tab in order for all incidents that are Overdue appear in the Detail Summary panel. Click the <u>Incident ID number</u> link for the incident you need to work with.</p> <div data-bbox="219 787 1437 1617"> <p>My Dashboard</p> <p>Work Items Alerts News SC Comments</p> <p>Documents Requiring My Attention (Grouped By Document Due Date)</p> <table border="1"> <thead> <tr> <th>Program Office</th> <th>Type</th> <th>Overdue</th> <th>Due Today</th> <th>Coming Due</th> <th>Due Date not Assigned</th> <th>Total</th> </tr> </thead> <tbody> <tr> <td>ODP-ID/A</td> <td>Site Level Incident</td> <td>142</td> <td>0</td> <td>1</td> <td>108</td> <td>251</td> </tr> <tr> <td>ODP-ID/A</td> <td>Individual Incident</td> <td>1888</td> <td>0</td> <td>8</td> <td>1279</td> <td>3175</td> </tr> </tbody> </table> <p>Detail Summary</p> <p>Export to Excel</p> <table border="1"> <thead> <tr> <th>ID</th> <th>MCI</th> <th>Individual Name</th> <th>Filing Organization</th> <th>County</th> <th>Primary Category</th> <th>Document</th> <th>Due Date</th> <th>Type</th> </tr> </thead> <tbody> <tr> <td>92986</td> <td>927847067</td> <td>PCG-EIMMR, MIKE</td> <td>PCG ODP EIM PROVIDER THREE</td> <td>Philadelphia</td> <td>Abuse</td> <td>Initial County Management Review</td> <td>06/18/2021</td> <td>Individual Incident</td> </tr> <tr> <td>92985</td> <td>927847067</td> <td>PCG-EIMMR, MIKE</td> <td>PCG ODP EIM PROVIDER THREE</td> <td>Philadelphia</td> <td>Neglect</td> <td>Initial County Management Review</td> <td>06/18/2021</td> <td>Individual Incident</td> </tr> <tr> <td>92980</td> <td>927847067</td> <td>PCG-EIMMR, MIKE</td> <td>PCG ODP EIM PROVIDER THREE</td> <td>Philadelphia</td> <td>Abuse</td> <td>Initial County Management Review</td> <td>06/18/2021</td> <td>Individual Incident</td> </tr> </tbody> </table> </div>	Program Office	Type	Overdue	Due Today	Coming Due	Due Date not Assigned	Total	ODP-ID/A	Site Level Incident	142	0	1	108	251	ODP-ID/A	Individual Incident	1888	0	8	1279	3175	ID	MCI	Individual Name	Filing Organization	County	Primary Category	Document	Due Date	Type	92986	927847067	PCG-EIMMR, MIKE	PCG ODP EIM PROVIDER THREE	Philadelphia	Abuse	Initial County Management Review	06/18/2021	Individual Incident	92985	927847067	PCG-EIMMR, MIKE	PCG ODP EIM PROVIDER THREE	Philadelphia	Neglect	Initial County Management Review	06/18/2021	Individual Incident	92980	927847067	PCG-EIMMR, MIKE	PCG ODP EIM PROVIDER THREE	Philadelphia	Abuse	Initial County Management Review	06/18/2021	Individual Incident
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2. The *Incident Detail* screen appears and lists the associated documents for the incident. Click **[INITIATE]** on the *County Management Review* document.

Incident Detail

ID: [93040](#) Version: 9 Type: Individual Incident Primary Category: Abuse Status: Open

Individual: PCG-FIMMB_LIZ Provider: PCG ODP EIM PROVIDER THREE
MCI: 550376446 Discovery Date: 06/04/2021

BACK TO SEARCH

Document Name	Status	Due Date	Action	Created Date	Created By	Last Edit Date	Edited By	Report Extension	Print
Incident First Section	Submitted	6/5/2021		6/24/2021	Three, Provider	6/24/2021	Three, Provider		<input type="checkbox"/>
Incident Final Section	Created	7/4/2021		6/24/2021	Three, Provider				<input type="checkbox"/>
Provider Certified Investigator Report	In Progress	7/4/2021		6/24/2021	Three, Provider	6/24/2021	ThreeCI, PCG		<input type="checkbox"/>
Initial County Management Review	Submitted	6/25/2021		6/24/2021	Three, Provider	7/1/2021	PhiladelphiaCou... PCG		<input type="checkbox"/>
Initial Regional Management Review	Created	6/25/2021		6/24/2021	Three, Provider				<input type="checkbox"/>
County Management Review	Created		INITIATE	6/24/2021	Three, Provider				<input type="checkbox"/>

NOTE: The *County Management Review* document consists of two pages:

- *Investigation Assignment*
- *Management Review Information*

Clicking the **Expand** icon (“plus sign”) beside the name of the *Management Review Information* document will display these pages:

County Management Review In Progress VALIDATE SUBMIT 4/20/2021 Three, Provider 5/14/2021 PhilaAE, PCG

Page Name
<input checked="" type="checkbox"/> Investigation Assignment
<input type="checkbox"/> Management Review Information

NOTE: The *Regional Management Review* document consists of three pages:

- *Investigation Assignment*
- *Management Review Information*
- *Follow-up Action Items*

Clicking the **Expand** icon (“plus sign”) beside the name of the *Management Review Information* document will display these pages:

Page Name
<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Investigation Assignment <input type="checkbox"/> Management Review Information <input checked="" type="checkbox"/> Follow-Up Actions Taken

3. When the *County Management Review* document is initiated, the *Incident Detail* screen is updated. The *County Management Review* status changes to “In Progress”, and the [SUBMIT] and [VALIDATE] buttons appear. Click the County Management Review link to begin completing the related pages.

Note: Regional users will follow a similar process when submitting the Regional Management Review.

Incident Detail

ID: [93040](#) Version: 9 Type: Individual Incident Primary Category: Abuse Status: Open

Individual: PCG-FIMMR, LIZ Provider: PCG ODP EIM PROVIDER THREE
MCI: 550376446 Discovery Date: 06/04/2021

Document Name	Status	Due Date	Action	Created Date	Created By	Last Edit Date	Edited By	Report Extension	Print
Incident First Section	Submitted	6/5/2021		6/24/2021	Three, Provider	6/24/2021	Three, Provider		<input type="checkbox"/>
Incident Final Section	Created	7/4/2021		6/24/2021	Three, Provider				<input type="checkbox"/>
Provider Certified Investigator Report	In Progress	7/4/2021		6/24/2021	Three, Provider	6/24/2021	ThreeCI, PCG		<input type="checkbox"/>
Initial County Management Review				6/24/2021	Three, Provider	7/1/2021	PhiladelphiaCou... PCG		<input type="checkbox"/>
Initial Regional Management Review	Created	6/25/2021		6/24/2021	Three, Provider				<input type="checkbox"/>
County Management Review	In Progress			6/24/2021	Three, Provider	7/1/2021	PhiladelphiaCou... PCG		<input type="checkbox"/>

VALIDATE SUBMIT

4. The *Investigation Assignment* page is displayed. This page needs to be completed only when an investigation is required or desired. In this example, the investigation is optional. When an investigation is mandatory, the *Does the Incident require additional Investigation?* and *Proceed with Investigation?* fields are read-only. Select an investigator name from the *Assigned Investigator* dropdown. To select a name, type the first few letters of the name, and a selection of names with those letters appears in the drop-down box. Complete this page only after the investigation has been completed.

Investigation Assignment

ID: [93040](#) Version: 9 Type: Individual Incident Primary Category: Abuse Status: Open

Individual: PCG-EIMMR_LIZ
MCI: 550376446
Provider: PCG ODP EIM PROVIDER THREE
Discovery Date: 06/04/2021

[Expand Details](#) ▼

Go To

Investigation Assignment

Does the incident require additional investigation? ★ Optional

Proceed with Investigation? ★ Yes

Assigned Investigator: ★ KInvestigator, PCG

Investigation Approval Status: ★ Approved

If the investigation was not approved, please provide comments:

NOTE: Selecting a name in the *Assigned Investigator* field automatically creates a *County or Regional Investigation* document that must be completed before the *Management Review* document can be submitted. After the Investigation is completed, the Management Reviewer will review the Investigation and 'Approve' or 'Disapprove' it. If the Investigation is disapproved a new Investigation and Management Review document are created. The Management Reviewer will provide a comment in the text box explain what areas need to be adjusted.

Do not select a response from the *Investigation Approval Status* drop-down box until **after** the review investigation (County Investigation or Regional Investigation) has been submitted for review.

Click [SAVE & CONTINUE] when you have filled out all the fields you need to as described here.

5. The *Management Review Information* page allows the reviewer to approve or disapprove the incident. In cases where the reviewer has additional questions or concerns regarding the information contained in an incident report, the reviewer can select Not Approved in the *Review Approval Status* field. By selecting **Not Approved**, the corresponding text box becomes a mandatory requirement and the reviewer should document any concerns, questions and/or recommendations in this text field.

When selecting **Not Approved**, reviewers must also complete these questions: *Are the incident primary and secondary categories correct?* and *If not approved are revisions needed in the provider investigation?*. Please note that if there are identified questions or concerns with an investigation, answering Yes to *If not approved, are revisions needed in the provider investigation?* will allow the investigator to make the necessary edits to the existing investigation summary in a new Provider Investigation Document. If the reviewer selects No to *If not approved are revisions needed in the provider investigation?*, the previously submitted Provider Investigation Document will remain in the Submitted status and edits to the investigation summary will not be allowed.

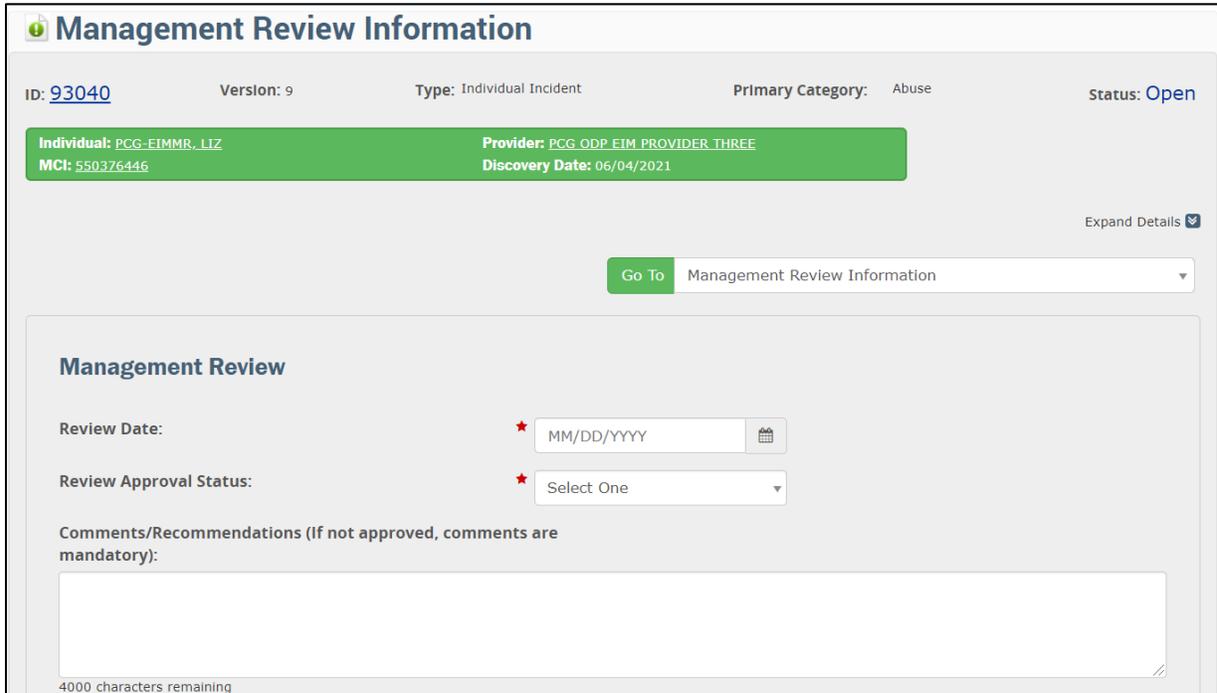
Additionally, an Investigation cannot be auto-submitted if the primary and secondary categories are not correct. A new final section will be created where the users can assign an investigation. If **No** was selected

in the *If not approved, are revisions needed in the provider investigation?*, an investigation is created containing the contents from the previous investigation, and it is automatically submitted.

If **Yes** is selected from the following drop-down boxes: *Are the incident primary and secondary categories correct* and *If not approved, are revisions needed in the provider investigation?*, revisions are required for the incident final section and provider section. Both documents will need to be updated and resubmitted.

The Incident Reporter then reviews the information appearing in the “not approved” text box when making corrections and completing the new final section document.

Click [**SAVE & CONTINUE**] to return to the *Incident Detail* screen.



Management Review Information

ID: [93040](#) Version: 9 Type: Individual Incident Primary Category: Abuse Status: [Open](#)

Individual: PCG-EIMMB, LIZ Provider: PCG ODP EIM PROVIDER THREE
MCI: 550376446 Discovery Date: 06/04/2021

Expand Details 

Go To Management Review Information 

Management Review

Review Date: 

Review Approval Status:

Comments/Recommendations (If not approved, comments are mandatory):

4000 characters remaining

NOTE: In the current example, the reviewer would not complete this page yet, since a certified investigation has been selected.

- The *Incident Detail* screen is displayed. Note that the *County Management Review* document status remains “In Progress,” and a *County Investigation* document has been added to the *Incident Detail* screen.

Incident Detail

ID: 93040 Version: 9 Type: Individual Incident Primary Category: Abuse Status: Open

Individual: PCG-EIMMR_LIZ Provider: PCG_ODP_EIM_PROVIDER_THREE
 MC: 550376446 Discovery Date: 06/04/2021

[BACK TO SEARCH](#)

[Collapse Details](#)

	Document Name	Status	Due Date	Action	Created Date	Created By	Last Edit Date	Edited By	Report Extension	Print
+	Incident First Section	Submitted	6/5/2021		6/24/2021	Three, Provider	6/24/2021	Three, Provider		<input type="checkbox"/>
+	Incident Final Section	Created	7/4/2021		6/24/2021	Three, Provider				<input type="checkbox"/>
+	Provider Certified Investigator Report	In Progress	7/4/2021		6/24/2021	Three, Provider	6/24/2021	ThreeCI, PCG		<input type="checkbox"/>
+	Initial County Management	Submitted	6/25/2021		6/24/2021	Three, Provider	7/1/2021	PhiladelphiaCou... PCG		<input type="checkbox"/>
+					6/24/2021	Three, Provider				<input type="checkbox"/>
+	County Management Review	In Progress		VALIDATE SUBMIT	6/24/2021	Three, Provider	7/1/2021	PhiladelphiaCou... PCG		<input type="checkbox"/>
+	County Investigation	Created			7/1/2021	Philadelph... PCG				<input type="checkbox"/>

The County Investigation document has been added.

NOTE: In this example, EIM would update the Dashboard of the individual performing the county investigation, to indicate that the *County Investigation* document can be initiated. The individual performing the county/region investigation would see the item appear on their Dashboard.

7. Once the *County Investigation* document has been submitted (see illustration below) EIM updates the *Incident Detail* screen to indicate that the management review can be completed.

Incident Detail

ID: [93040](#) Version: 9 Type: Individual Incident Primary Category: Abuse Status: Open

Individual: [PCG-FIMMR_LIZ](#) Provider: [PCG ODP EIM PROVIDER THREE](#)
MCI: 550376446 Discovery Date: 06/04/2021

[BACK TO SEARCH](#)

[Collapse Details](#)

	Document Name	Status	Due Date	Action	Created Date	Created By	Last Edit Date	Edited By	Report Extension	Print
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	Incident Final Section	Created	7/4/2021		6/24/2021	Three, Provider				<input type="checkbox"/>
	Provider Certified Investigator Report	In Progress	7/4/2021		6/24/2021	Three, Provider	6/24/2021	ThreeCI, PCG		<input type="checkbox"/>
	Initial County Management Review	Submitted	6/25/2021		6/24/2021	Three, Provider	7/1/2021	PhiladelphiaCou... PCG		<input type="checkbox"/>
	Initial Regional Management Review	Created	6/25/2021		6/24/2021	Three, Provider				<input type="checkbox"/>
	County Management Review	In Progress		VALIDATE SUBMIT	6/24/2021	Three, Provider	7/1/2021	PhiladelphiaCou... PCG		<input type="checkbox"/>
	County Investigation	Submitted			7/1/2021	Philadelphi... PCG	7/1/2021	KInvestigator, PCG		<input type="checkbox"/>

NOTE: Because this job aid primarily focuses on the management review process for individuals with the Incident Reviewer role, the County Investigation step by step process is not shown here.

8. After the *County Investigation* document is submitted, EIM updates the Dashboard of the individual performing the incident review. Click the **Expand** icon (“plus sign”) beside the name of the *County Management Review* document.

Incident Detail

ID: [93040](#) Version: 9 Type: Individual Incident Primary Category: Abuse Status: Open

Individual: [PCG-FIMMR_LIZ](#) Provider: [PCG ODP EIM PROVIDER THREE](#)
MCI: 550376446 Discovery Date: 06/04/2021

[BACK TO SEARCH](#)

[Collapse Details](#)

	Document Name	Status	Due Date	Action	Created Date	Created By	Last Edit Date	Edited By	Report Extension	Print
	Incident First Section	Submitted	6/5/2021		6/24/2021	Three, Provider	6/24/2021	Three, Provider		<input type="checkbox"/>
	Incident Final Section	Created	7/4/2021		6/24/2021	Three, Provider				<input type="checkbox"/>
	Provider Certified Investigator Report	In Progress	7/4/2021		6/24/2021	Three, Provider	6/24/2021	ThreeCI, PCG		<input type="checkbox"/>
	Initial County Management Review				6/24/2021	Three, Provider	7/1/2021	PhiladelphiaCou... PCG		<input type="checkbox"/>
	Initial Regional Management Review	Created	6/25/2021		6/24/2021	Three, Provider				<input type="checkbox"/>
	County Management Review	In Progress		VALIDATE SUBMIT	6/24/2021	Three, Provider	7/1/2021	PhiladelphiaCou... PCG		<input type="checkbox"/>
	County Investigation	Submitted			7/1/2021	Philadelphi... PCG	7/1/2021	KInvestigator, PCG		<input type="checkbox"/>

Click the **Plus (+) sign.**

NOTE: This example assumes that the management reviewer thoroughly reviewed the county investigation and had no further questions or comments. See the note following Step 10 for a sample scenario of the reviewer not approving the investigation document.

9. The expanded *County Management Review* document is displayed. Click the [Investigation Assignment](#) link to open the *Investigation Assignment* page.

Incident Detail

ID: [93040](#) Version: 9 Type: Individual Incident Primary Category: Abuse Status: Open

Individual: [PCG-EIMMR_LIZ](#) Provider: [PCG-ODP-EIM-PROVIDER-THREE](#)
MCI: 550376446 Discovery Date: 06/04/2021

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Collapse Details

Document Name	Status	Due Date	Action	Created Date	Created By	Last Edit Date	Edited By	Report Extension	Print
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+ Incident Final Section	Created	7/4/2021		6/24/2021	Three, Provider				<input type="checkbox"/>
+ Provider Certified Investigator Report	In Progress	7/4/2021		6/24/2021	Three, Provider	6/24/2021	ThreeCI, PCG		<input type="checkbox"/>
+ Initial County Management Review	Submitted	6/25/2021		6/24/2021	Three, Provider	7/1/2021	PhiladelphiaCou... PCG		<input type="checkbox"/>
+ Initial Regional Management Review	Created	6/25/2021		6/24/2021	Three, Provider				<input type="checkbox"/>
- County Management Review	In Progress		<input type="button" value="VALIDATE"/> <input type="button" value="SUBMIT"/>	6/24/2021	Three, Provider	7/1/2021	PhiladelphiaCou... PCG		<input type="checkbox"/>

Page Name

+
Investigation Assignment

+
Management Review Information

10. The *Investigation Assignment* page is displayed. Complete the *Investigation Determination* fields (shown inside a red border below) and then click **[SAVE & CONTINUE]**.

Indicate County/Region Investigation Determination: Confirmed

Has the family/guardian/individual's designee been notified of the outcome of the investigation? Yes

If no, please explain:

4000 characters remaining

Concur with provider investigation? Yes

If no, please explain:

NOTE

Incident Reviewers can choose to **not approve** the *County investigation* or *Regional investigation* document. To **not approve** an investigation document (and create a **new** investigation document) you must complete the *Investigation Assignment* and *Management Review Information* pages as follows:

- On the *Investigation Assignment* screen select *Not Approved* from the *Investigation Approval Status* drop down box. Enter the reason why the investigation was not approved in the textbox below the *Approval Status* drop-down box and then click [**SAVE & CONTINUE**].

- On the *Management Review Information* page, select a date in the *Review Date* field, select **Approved** from the *Review Approval Status* drop down box and then click [**SAVE & CONTINUE**].

- On the *Incident Detail* screen, submit the management review. EIM creates new documents for the investigation and the management review.

NOTE: See the section “*Investigation Assignment*” in the ODP-ID/A EIM User Manual for more information.

- After the *Investigation Assignment* page is completed and the investigation is approved in Step 10, the *Management Review Information* screen is displayed. Enter the review date of the management review and make a selection in the *Review Approval Status* drop-down box. Next, click [**SAVE & CONTINUE**].

Management Review

Review Date:

Review Approval Status:

Comments/Recommendations (if not approved, comments are mandatory):

4000 characters remaining

Initial Incident Closure Date:

EIM updates the **Initial Incident Closure Date** when the Regional Management Review is submitted.

Enter the **Review Date** and make a selection in the **Review Approval Status** drop-down box.

Note: users cannot update the “Incident Closure Date” field and the “Was the incident closed on time?” field. (EIM updates this information when the incident is closed.)

12. The *Incident Detail* screen is displayed. Click [**VALIDATE**] for the *County Management Review* document.

Incident Detail

ID: [93040](#) Version: 9 Type: Individual Incident Primary Category: Abuse Status: [Open](#)

Individual: [PCG-EIMMR, LIZ](#) Provider: [PCG ODP EIM PROVIDER THREE](#)
MCI: [550376446](#) Discovery Date: [06/04/2021](#)

[Collapse Details](#)

Document Name	Status	Due Date	Action	Created Date	Created By	Last Edit Date	Edited By	Report Extension	Print
Incident First Section	Submitted	6/5/2021		6/24/2021	Three, Provider	6/24/2021	Three, Provider		<input type="checkbox"/>
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County Management Review	In Progress		VALIDATE SUBMIT	6/24/2021	Three, Provider	7/1/2021	PhiladelphiaCou... PCG		<input type="checkbox"/>
County Investigation	Submitted			7/1/2021	Philadelphi... PCG	7/1/2021	KInvestigator, PCG		<input type="checkbox"/>

Click the **Validate** button.

13. Upon clicking [**VALIDATE**] EIM displays the message: “The document contains invalid responses”. Click the **X** icon beside the [Management Review Information](#) page link to view the error.

Incident Detail

The document contains invalid responses

ID: [93040](#) Version: 9 Type: Individual Incident Primary Category: Abuse Status: Open

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Initial Regional Management Review	Created	6/25/2021		6/24/2021	Three, Provider				<input type="checkbox"/>
County Management Review	In Progress		VALIDATE SUBMIT	6/24/2021	Three, Provider	7/1/2021			<input type="checkbox"/>

Page Name

- Investigation Assignment
- Management Review Information

By clicking the red X next to the section, information regarding the error will be displayed.

14. Click the [Investigation Assignment](#) link. Resolve any errors that appear on the page, click [**SAVE & CONTINUE**] and then navigate back to the *Incident Detail* screen.

Investigation Assignment

ID: [93040](#) Version: 9 Type: Individual Incident Primary Category: Abuse Status: Open

Individual: [PCG-EIMMR_LIZ](#) Provider: [PCG ODP EIM PROVIDER THREE](#)
MCI: 550376446 Discovery Date: 06/04/2021

Go To: [Investigation Assignment](#)

Investigation Assignment

Does the incident require additional investigation? ★ Optional

Proceed with Investigation? ★

Assigned Investigator: ★

Investigation Approval Status: ★

15. The *Incident Detail* screen is displayed. Click [**VALIDATE**]. **Note:** you do not have to click Validate before clicking submit. If errors are still present a validation errors message will appear.

Incident Detail

ID: 93040 Version: 9 Type: Individual Incident Primary Category: Abuse Status: Open

Individual: PCG-FIMMR_LIZ Provider: PCG_ODP_EIM_PROVIDER_THREE
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+	County Investigation	Submitted			7/1/2021	Philadelphi... PCG	7/1/2021	KInvestigator, PCG		<input type="checkbox"/>

Click the **VALIDATE** button.

16. Click the **[SUBMIT]** button.

Incident Detail

Validation Successful

ID: 93040 Version: 9 Type: Individual Incident Primary Category: Abuse Status: Open

Individual: PCG-FIMMR_LIZ Provider: PCG_ODP_EIM_PROVIDER_THREE
 MCI: 550376446 Discovery Date: 06/04/2021

Collapse Details

	Document Name	Status	Due Date	Action	Created Date	Created By	Last Edit Date	Edited By	Report Extension	Print
+	Incident First Section	Submitted	6/5/2021		6/24/2021	Three, Provider	6/24/2021	Three, Provider		<input type="checkbox"/>
+	Incident Final Section	Created	7/4/2021		6/24/2021	Three, Provider				<input type="checkbox"/>
+	Provider Certified Investigator Report	In Progress	7/4/2021		6/24/2021	Three, Provider	6/24/2021	ThreeCI, PCG		<input type="checkbox"/>
+	Initial County Management Review	Submitted	6/25/2021		6/24/2021	Three, Provider	7/1/2021	PhiladelphiaCou... PCG		<input type="checkbox"/>
+	Initial Regional Management Review	Created	6/25/2021		6/24/2021	Three, Provider				<input type="checkbox"/>
+	County Management Review	In Progress		VALIDATE SUBMIT	6/24/2021	Three, Provider	7/1/2021	PhiladelphiaCou... PCG		<input type="checkbox"/>
+	County Investigation	Submitted			7/1/2021	Philadelphi... PCG	7/1/2021	KInvestigator, PCG		<input type="checkbox"/>

Click the **SUBMIT** button.

17. When you click **[SUBMIT]** the status of the *County Management Review* document changes from “In Progress” to “Submitted.”

Incident Detail

ID: [93040](#) Version: 9 Type: Individual Incident Primary Category: Abuse Status: **Open**

Individual: PCG-EIMMR, LIZ Provider: PCG ODP EIMMR, MIKE Discovery Date: 06/06/2021

The incident maintains a status of "Open."

Document Name	Status	Due Date	Action	Created Date	Created By	Last Edit Date	Edited By	Report Extension	Print
Incident First Section	Submitted	6/5/2021		6/24/2021	Three, Provider	6/24/2021	Three, Provider		<input type="checkbox"/>
Incident Final Section	Submitted	7/4/2021		6/24/2021	Three, Provider	7/1/2021	Three, Provider		<input type="checkbox"/>
Provider Certified Investigator Report	Submitted	7/4/2021		6/24/2021	Three, Provider	7/1/2021	ThreeCI, PCG		<input type="checkbox"/>
Initial County Management Review	Submitted	6/25/2021		6/24/2021	Three, Provider	7/1/2021	PhiladelphiaCou... PCG		<input type="checkbox"/>
Initial Regional Management Review	Created	6/25/2021		6/24/2021	Three,				<input type="checkbox"/>
County Management Review	Submitted	7/31/2021				7/1/2021	PhiladelphiaCou... PCG		<input type="checkbox"/>
County Investigation	Submitted	7/31/2021		7/1/2021	Philadelph... PCG	7/1/2021	Three, Provider		<input type="checkbox"/>
Provider Administrative Review	Submitted	7/4/2021		7/1/2021	ThreeCI, PCG	7/1/2021	Three, Provider		<input type="checkbox"/>

The status of the document has changed to "Submitted."

NOTE: The incident maintains a status of "Open" until the *Regional Management Review* document is successfully completed.

18. Once the *County Management Review* document is successfully submitted, EIM updates the appropriate regional reviewer's Dashboard (shown below) so that the *Regional Review* document can be initiated. The regional reviewer sees the item while monitoring their Dashboard and clicks the incident ID number link to open the incident.

My Dashboard

Work Items Alerts News

Documents Requiring My Attention (Grouped By Document Due Date)

Program Office	Type	Overdue	Due Today	Coming Due	Due Date not Assigned	Total
ODP-ID/A	Site Level Incident	156	0	0	0	156
ODP-ID/A	Individual Incident	1861	0	3	0	1867

Filters:

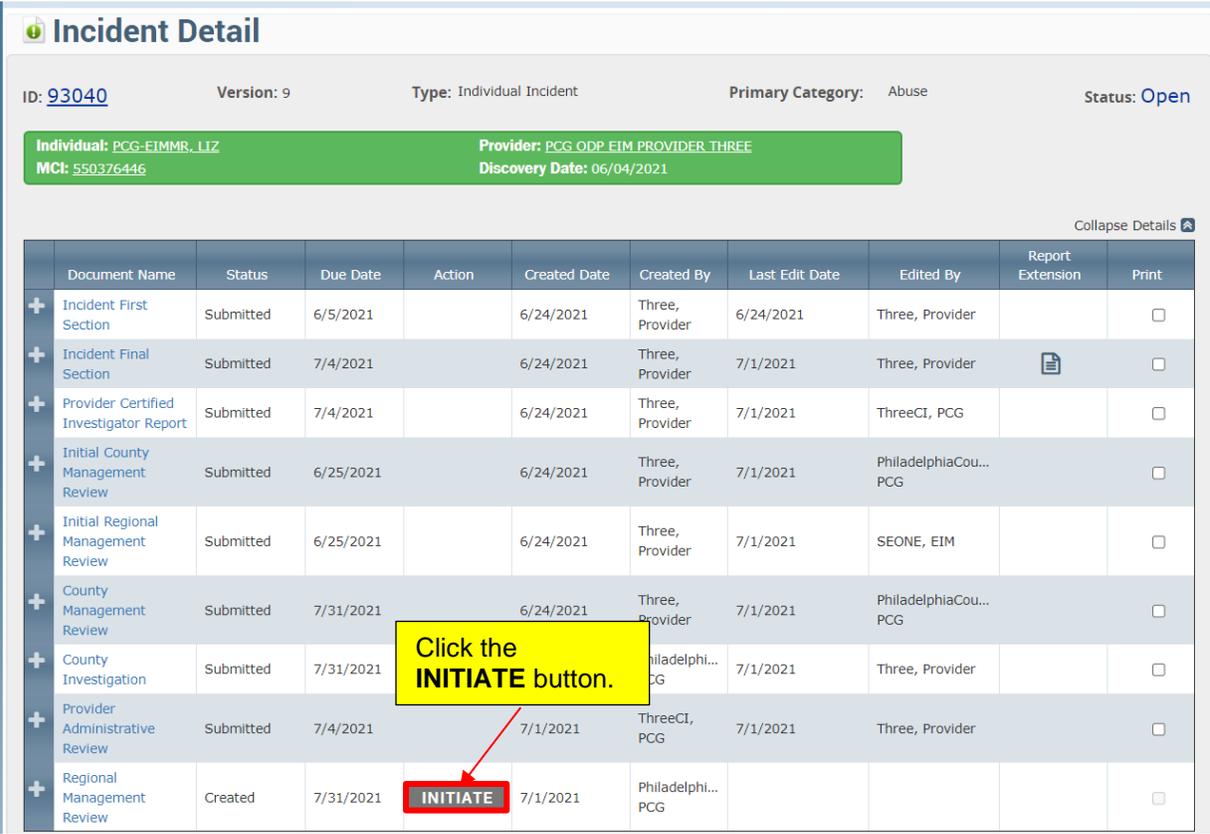
- Program Office
- Organization
- Waiver/Program
- Incident/Complaint
- Incident/Complaint Types
- Document Type
- Document Name
- County
- County/Joinder

SELECT ALL UNSELECT ALL APPLY SET AS DEFAULT

Detail Summary

Export to Excel

ID	MCI	Individual Name	Filing Organization	County	Primary Category	Document	Due Date	Type
93040	550376446	PCG-EIMMR, LIZ	PCG ODP EIM PROVIDER THREE	Philadelphia	Abuse	Regional Management Review	07/31/2021	Individual Incident
92869	927847067	PCG-EIMMR, MIKE	PCG ODP EIM PROVIDER THREE	Philadelphia	Abuse	Regional Management Review	07/21/2021	Individual Incident
91740	927847067	PCG-EIMMR, MIKE	PCG ODP EIM PROVIDER THREE	Philadelphia	Abuse	Regional Management Review	07/31/2021	Individual Incident

	<p>NOTE – The <i>County Management Review</i> and <i>Regional Management Review</i> documents cannot be completed by the same user and require different roles in EIM.</p>																																																																																																				
<p>19.</p>	<p>When the regional reviewer clicks the incident ID link, the <i>Incident Detail</i> screen displays details on the incident in question. Click the [INITIATE] button for the <i>Regional Management Review</i> document.</p> <div data-bbox="219 457 1429 1291" style="border: 1px solid #ccc; padding: 10px;">  <p>Incident Detail</p> <p>ID: 93040 Version: 9 Type: Individual Incident Primary Category: Abuse Status: Open</p> <p>Individual: PCG-EIMMB_LIZ Provider: PCG ODP EIM PROVIDER THREE MCI: 550376446 Discovery Date: 06/04/2021</p> <table border="1"> <thead> <tr> <th>Document Name</th> <th>Status</th> <th>Due Date</th> <th>Action</th> <th>Created Date</th> <th>Created By</th> <th>Last Edit Date</th> <th>Edited By</th> <th>Report Extension</th> <th>Print</th> </tr> </thead> <tbody> <tr> <td>Incident First Section</td> <td>Submitted</td> <td>6/5/2021</td> <td></td> <td>6/24/2021</td> <td>Three, Provider</td> <td>6/24/2021</td> <td>Three, Provider</td> <td></td> <td><input type="checkbox"/></td> </tr> <tr> <td>Incident Final Section</td> <td>Submitted</td> <td>7/4/2021</td> <td></td> <td>6/24/2021</td> <td>Three, Provider</td> <td>7/1/2021</td> <td>Three, Provider</td> <td></td> <td><input type="checkbox"/></td> </tr> <tr> <td>Provider Certified Investigator Report</td> <td>Submitted</td> <td>7/4/2021</td> <td></td> <td>6/24/2021</td> <td>Three, Provider</td> <td>7/1/2021</td> <td>ThreeCI, PCG</td> <td></td> <td><input type="checkbox"/></td> </tr> <tr> <td>Initial County Management Review</td> <td>Submitted</td> <td>6/25/2021</td> <td></td> <td>6/24/2021</td> <td>Three, Provider</td> <td>7/1/2021</td> <td>PhiladelphiaCou... PCG</td> <td></td> <td><input type="checkbox"/></td> </tr> <tr> <td>Initial Regional Management Review</td> <td>Submitted</td> <td>6/25/2021</td> <td></td> <td>6/24/2021</td> <td>Three, Provider</td> <td>7/1/2021</td> <td>SEONE, EIM</td> <td></td> <td><input type="checkbox"/></td> </tr> <tr> <td>County Management Review</td> <td>Submitted</td> <td>7/31/2021</td> <td></td> <td>6/24/2021</td> <td>Three, Provider</td> <td>7/1/2021</td> <td>PhiladelphiaCou... PCG</td> <td></td> <td><input type="checkbox"/></td> </tr> <tr> <td>County Investigation</td> <td>Submitted</td> <td>7/31/2021</td> <td></td> <td></td> <td>Philadelphi... CG</td> <td>7/1/2021</td> <td>Three, Provider</td> <td></td> <td><input type="checkbox"/></td> </tr> <tr> <td>Provider Administrative Review</td> <td>Submitted</td> <td>7/4/2021</td> <td></td> <td>7/1/2021</td> <td>ThreeCI, PCG</td> <td>7/1/2021</td> <td>Three, Provider</td> <td></td> <td><input type="checkbox"/></td> </tr> <tr> <td>Regional Management Review</td> <td>Created</td> <td>7/31/2021</td> <td>INITIATE</td> <td>7/1/2021</td> <td>Philadelphi... PCG</td> <td></td> <td></td> <td></td> <td><input type="checkbox"/></td> </tr> </tbody> </table> </div>	Document Name	Status	Due Date	Action	Created Date	Created By	Last Edit Date	Edited By	Report Extension	Print	Incident First Section	Submitted	6/5/2021		6/24/2021	Three, Provider	6/24/2021	Three, Provider		<input type="checkbox"/>	Incident Final Section	Submitted	7/4/2021		6/24/2021	Three, Provider	7/1/2021	Three, Provider		<input type="checkbox"/>	Provider Certified Investigator Report	Submitted	7/4/2021		6/24/2021	Three, Provider	7/1/2021	ThreeCI, PCG		<input type="checkbox"/>	Initial County Management Review	Submitted	6/25/2021		6/24/2021	Three, Provider	7/1/2021	PhiladelphiaCou... PCG		<input type="checkbox"/>	Initial Regional Management Review	Submitted	6/25/2021		6/24/2021	Three, Provider	7/1/2021	SEONE, EIM		<input type="checkbox"/>	County Management Review	Submitted	7/31/2021		6/24/2021	Three, Provider	7/1/2021	PhiladelphiaCou... PCG		<input type="checkbox"/>	County Investigation	Submitted	7/31/2021			Philadelphi... CG	7/1/2021	Three, Provider		<input type="checkbox"/>	Provider Administrative Review	Submitted	7/4/2021		7/1/2021	ThreeCI, PCG	7/1/2021	Three, Provider		<input type="checkbox"/>	Regional Management Review	Created	7/31/2021	INITIATE	7/1/2021	Philadelphi... PCG				<input type="checkbox"/>
Document Name	Status	Due Date	Action	Created Date	Created By	Last Edit Date	Edited By	Report Extension	Print																																																																																												
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Regional Management Review	Created	7/31/2021	INITIATE	7/1/2021	Philadelphi... PCG				<input type="checkbox"/>																																																																																												
<p>20.</p>	<p>The <i>Incident Detail</i> screen is updated, and the <i>Regional Management Review</i> document status changes from “Created” to “In Progress”. The [INITIATE] button is replaced with the [VALIDATE] and</p>																																																																																																				

[SUBMIT] buttons. Click the *Regional Management Review* document link.

Incident Detail

ID: [93040](#) Version: 9 Type: Individual Incident Primary Category: Abuse Status: [Open](#)

Individual: [PCG-EIMMB.LIZ](#) Provider: [PCG ODP EIM PROVIDER THREE](#)
 MCI: [550376446](#) Discovery Date: [06/04/2021](#)

Collapse Details 

	Document Name	Status	Due Date	Action	Created Date	Created By	Last Edit Date	Edited By	Report Extension	Print
+	Incident First Section	Submitted	6/5/2021		6/24/2021	Three, Provider	6/24/2021	Three, Provider		<input type="checkbox"/>
+	Incident Final Section	Submitted	7/4/2021		6/24/2021	Three, Provider	7/1/2021	Three, Provider		<input type="checkbox"/>
+	Provider Certified Investigator Report	Submitted	7/4/2021		6/24/2021	Three, Provider	7/1/2021	ThreeCI, PCG		<input type="checkbox"/>
+	Initial County Management Review	Submitted	6/25/2021		6/24/2021	Three, Provider	7/1/2021	PhiladelphiaCou... PCG		<input type="checkbox"/>
+	Initial Regional Management Review	Submitted	6/25/2021		6/24/2021	Three, Provider	7/1/2021	SEONE, EIM		<input type="checkbox"/>
+	County Management Review	Submitted	6/25/2021		6/24/2021	Three, Provider	7/1/2021	PhiladelphiaCou... PCG		<input type="checkbox"/>
+	County Investigation	Submitted	7/1/2021		7/1/2021	Philadelphi... PCG	7/1/2021	Three, Provider		<input type="checkbox"/>
+	Provider Administrative Review	Submitted	7/4/2021		7/1/2021	ThreeCI, PCG	7/1/2021	Three, Provider		<input type="checkbox"/>
+	Regional Management Review	In Progress	7/31/2021	<div style="display: flex; gap: 5px;"> VALIDATE SUBMIT </div>	7/1/2021	Philadelphi... PCG	7/1/2021	SEONE, EIM		<input type="checkbox"/>

Click the **Regional Management Review** link.

Regional Management Review

21.

The Investigation Assignment screen is displayed. For this example, the investigation is Optional. However, you as the reviewer may opt to request an investigation. Click **[SAVE & CONTINUE]**.

Investigation Assignment

ID: [93040](#) Version: 9 Type: Individual Incident Primary Category: Abuse Status: [Open](#)

Individual: PCG-EIMMR_LIZ MCI: 550376446 Provider: PCG.ODP.EIM.PROVIDER.THREE Discovery Date: 06/04/2021

Expand Details

Go To Investigation Assignment

Investigation Assignment

Does the incident require additional investigation? ★ Optional

Proceed with Investigation? ★ Yes

Assigned Investigator: ★

Investigation Approval Status: ★ Select One

If the investigation was not approved, please provide comments:

The reviewer may opt to request an investigation.

NOTE: If an investigation is completed, the *Proceed with Investigation* field displays a **Yes** in read-only format, and you must select a name from the *Assigned Investigator* field. These steps generate a *Regional Investigation* document that must be completed before the *Regional Management Review Information* document can be submitted.

22. The Management Review Information screen is displayed. Complete the “*Review Date*” and “*Approval Status*” fields and then click [**SAVE & CONTINUE**].

Management Review Information

ID: [93040](#) Version: 9 Type: Individual Incident Primary Category: Abuse Status: [Open](#)

Individual: PCG-EIMMR_LIZ MCI: 550376446 Provider: PCG.ODP.EIM.PROVIDER.THREE Discovery Date: 06/04/2021

Expand Details

Go To Management Review Information

Management Review

Review Date: ★ MM/DD/YYYY

Review Approval Status: ★ Select One

Comments/Recommendations (If not approved, comments are mandatory):

Complete the **Review Date** and select the **Review Approval Status** from the drop-down list.

4000 characters remaining

	<p>NOTE: When a user selects Not Approved from the <i>Review Approval Status</i> drop-down list, a new final section document and a new <i>Management Review</i> document are automatically created when the user submits the management review. When selecting Not Approved, reviewers must complete the <i>If the incident report is not approved, please provide comments</i> text box, as well as the associated “<i>not approved reason</i>” drop down box. The incident reporter then reviews the information in this text box when making corrections and completing the new final section document.</p>
<p>23.</p>	<p>Select Yes or No from the Is this incident a result of abuse or neglect? drop-down box. Select Yes or No from the Did the information contained in the incident report validate that the incident was reported promptly? drop-down box. Both of these fields are mandatory.</p> <div data-bbox="219 625 1432 1449" style="border: 1px solid black; padding: 10px;"> <p>Management Review</p> <p>Review Date: ★ <input type="text" value="MM/DD/YYYY"/> </p> <p>Review Approval Status: ★ <input type="text" value="Select One"/></p> <p>Comments/Recommendations (If not approved, comments are mandatory):</p> <div style="border: 1px solid gray; height: 40px; width: 100%;"></div> <p style="font-size: small;">4000 characters remaining</p> <p>Initial Incident Closure Date:</p> <p>Number of Days elapsed between Incident Creation and Initial Closure:</p> <p>Are the incident primary and secondary categories correct? <input type="text" value="Select One"/></p> <p>Is this incident a result of abuse or neglect? ★ <input style="border: 2px solid red;" type="text" value="Select One"/></p> <p>Did the information contained in the incident report validate that the incident was reported promptly? ★ <input style="border: 2px solid red;" type="text" value="Select One"/></p> <p>If no, please explain:</p> <div style="border: 1px solid gray; height: 40px; width: 100%;"></div> <p style="font-size: small;">4000 characters remaining</p> </div> <div data-bbox="1071 1134 1377 1260" style="border: 1px solid black; background-color: yellow; padding: 5px; margin-top: 10px;"> <p>Select Yes or No for each of these drop-down boxes.</p> </div>
<p>24.</p>	<p>The <i>Incident Detail</i> screen appears. Click [VALIDATE] to confirm that all screens and all fields in the management review have been completed correctly. Note: you do not have to click Validate before clicking submit. If errors are still present a validation errors message will appear.</p>

Incident Detail

ID: [93040](#) Version: 9 Type: Individual Incident Primary Category: Abuse Status: [Open](#)

Individual: PCG-FIMMR, LIZ **Provider:** PCG.ODP.EIM.PROVIDER.THREE
MCI: 550376446 **Discovery Date:** 06/04/2021

Collapse Details 

	Document Name	Status	Due Date	Action	Created Date	Created By	Last Edit Date	Edited By	Report Extension	Print
+	Incident First Section	Submitted	6/5/2021		6/24/2021	Three, Provider	6/24/2021	Three, Provider		<input type="checkbox"/>
+	Incident Final Section	Submitted	7/4/2021		6/24/2021	Three, Provider	7/1/2021	Three, Provider		<input type="checkbox"/>
+	Provider Certified Investigator Report	Submitted	7/4/2021		6/24/2021	Three, Provider	7/1/2021	ThreeCI, PCG		<input type="checkbox"/>
+	Initial County Management Review	Submitted	6/25/2021		6/24/2021	Three, Provider	7/1/2021	PhiladelphiaCou... PCG		<input type="checkbox"/>
+	Initial Regional Management Review	Submitted	6/25/2021		6/24/2021	Three, Provider	7/1/2021	SEONE, EIM		<input type="checkbox"/>
+	County Management Review	Submitted	7/31/2021			Three, Provider	7/1/2021	PhiladelphiaCou... PCG		<input type="checkbox"/>
+	County Investigation	Submitted	7/31/2021			Philadelphi... PCG	7/1/2021	Three, Provider		<input type="checkbox"/>
+	Provider Administrative Review	Submitted	7/4/2021		7/1/2021	ThreeCI, PCG	7/1/2021	Three, Provider		<input type="checkbox"/>
+	Regional Management Review	In Progress	7/31/2021	VALIDATE SUBMIT	7/1/2021	Philadelphi... PCG	7/1/2021	SEONE, EIM		<input type="checkbox"/>

Click the **VALIDATE** button.

25. The "Validation Successful" message is displayed.

Enterprise Incident Management Management Review – Investigation Required



Validation Successful

ID: [93040](#) Version: 9 Type: Individual Incident Primary Category: Abuse Status: Open

Individual: PCG-EIMMR, LIZ **Provider:** PCG.ODP EIM PROVIDER THREE
MCI: 550376446 **Discovery Date:** 06/04/2021

Collapse Details

	Document Name	Status	Due Date	Action	Created Date	Created By	Last Edit Date	Edited By	Report Extension	Print
+	Incident First Section	Submitted	6/5/2021		6/24/2021	Three, Provider	6/24/2021	Three, Provider		<input type="checkbox"/>
+	Incident Final Section	Submitted	7/4/2021		6/24/2021	Three, Provider	7/1/2021	Three, Provider		<input type="checkbox"/>
+	Provider Certified Investigator Report	Submitted	7/4/2021		6/24/2021	Three, Provider	7/1/2021	ThreeCI, PCG		<input type="checkbox"/>
+	Initial County Management Review	Submitted	6/25/2021		6/24/2021	Three, Provider	7/1/2021	PhiladelphiaCou... PCG		<input type="checkbox"/>
+	Initial Regional Management Review	Submitted	6/25/2021		6/24/2021	Three, Provider	7/1/2021	SEONE, EIM		<input type="checkbox"/>
+	County Management Review	Submitted	7/31/2021		6/24/2021	Three, Provider	7/1/2021	PhiladelphiaCou... PCG		<input type="checkbox"/>
+	County Investigation	Submitted	7/31/2021		7/1/2021	Philadelphi... PCG	7/1/2021	Three, Provider		<input type="checkbox"/>
+	Provider Administrative Review	Submitted	7/4/2021		7/1/2021	ThreeCI, PCG	7/1/2021	Three, Provider		<input type="checkbox"/>
+	Regional Management Review	In Progress	7/31/2021	<div style="text-align: center;"> <input type="button" value="VALIDATE"/> <input type="button" value="SUBMIT"/> </div>	7/1/2021	Philadelphi... PCG	7/1/2021	SEONE, EIM		<input type="checkbox"/>

NOTE: If the validation is not successful, an error message stating “The document contains invalid responses” appears in red at the top of the screen. Users must review the screens and make corrections before revalidating and resubmitting the document.

26. Click **[SUBMIT]** to submit the *Regional Management Review* document.

Validation Successful

ID: [93040](#) Version: 9 Type: Individual Incident Primary Category: Abuse Status: **Open**

Individual: PCG-FIMMR, LIZ **Provider:** PCG.ODP.EIM.PROVIDER.THREE
MCI: 550376446 **Discovery Date:** 06/04/2021

Collapse Details

	Document Name	Status	Due Date	Action	Created Date	Created By	Last Edit Date	Edited By	Report Extension	Print
+	Incident First Section	Submitted	6/5/2021		6/24/2021	Three, Provider	6/24/2021	Three, Provider		<input type="checkbox"/>
+	Incident Final Section	Submitted	7/4/2021		6/24/2021	Three, Provider	7/1/2021	Three, Provider		<input type="checkbox"/>
+	Provider Certified Investigator Report	Submitted	7/4/2021		6/24/2021	Three, Provider	7/1/2021	ThreeCI, PCG		<input type="checkbox"/>
+	Initial County Management Review	Submitted	6/25/2021		6/24/2021	Three, Provider	7/1/2021	PhiladelphiaCou... PCG		<input type="checkbox"/>
+	Initial Regional Management Review	Submitted	6/25/2021		6/24/2021	Three, Provider	7/1/2021	SEONE, EIM		<input type="checkbox"/>
+	County Management Review	Submitted	7/31/2021		6/24/2021	Three, Provider	7/1/2021	PhiladelphiaCou... PCG		<input type="checkbox"/>
+	County Investigation	Submitted	7/31/2021		7/1/2021	Philadelphi... PCG	7/1/2021	Three, Provider		<input type="checkbox"/>
+	Provider Administrative Review	Submitted	7/4/2021		7/1/2021	ThreeCI, PCG	7/1/2021	Three, Provider		<input type="checkbox"/>
+	Regional Management Review	In Progress	7/31/2021		7/1/2021	Philadelphi... PCG	7/1/2021	SEONE, EIM		<input type="checkbox"/>

VALIDATE
SUBMIT

27. The *Incident Detail* screen is displayed. The *Regional Management Review* document status changes from “In Progress” to “Submitted.”

Incident Detail

ID: [93040](#) Version: 9 Type: Individual Incident Primary Category: Abuse Status: **Closed**

Individual: PCG-EIMMR_LIZ Provider: PCG-ODP-EIM PROVIDER THRE
MC: 550376446 Discovery Date: 06/04/2021

The incident status is now "Closed."

Collapse Details

	Document Name	Status	Due Date	Action	Created Date	Created By	Last Edit Date	Edited By	Report Extension	Print
+	Incident First Section	Submitted	6/5/2021		6/24/2021	Three, Provider	6/24/2021	Three, Provider		<input type="checkbox"/>
+	Incident Final Section	Submitted	7/4/2021		6/24/2021	Three, Provider	7/1/2021	Three, Provider		<input type="checkbox"/>
+	Provider Certified Investigator Report	Submitted	7/4/2021		6/24/2021	Three, Provider	7/1/2021	ThreeCI, PCG		<input type="checkbox"/>
+	Initial County Management Review	Submitted	6/25/2021		6/24/2021	Three, Provider	7/1/2021	PhiladelphiaCou... PCG		<input type="checkbox"/>
+	Initial Regional Management Review	Submitted	6/25/2021		6/24/2021	Three, Provider	7/1/2021	SEONE, EIM		<input type="checkbox"/>
+	County Management Review	Submitted	7/31/2021		6/24/2021	Three, Provider	7/1/2021	PhiladelphiaCou... PCG		<input type="checkbox"/>
+	County Investigation	Submitted	7/31/2021		7/1/2021	Philadelphi... PCG	7/1/2021	Three, Provider		<input type="checkbox"/>
+	Provider Administrative Review	Submitted	7/4/2021				7/1/2021	Three, Provider		<input type="checkbox"/>
+	Regional Management Review	Submitted	7/31/2021		7/1/2021	Philadelphia... PCG	7/1/2021	SEONE, EIM		<input type="checkbox"/>

The status of the document has changed to "Submitted."

NOTE: The incident status changes from "Open" to "Closed" upon the successful completion of the regional management review.