EIM Reference Guide –
Understanding the EIM Incident Detail Screen

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09/11/2021

Overview

The *Incident Detail* page displays key information about incidents. These *Detail* pages also provide the "launching pads" and logs for much of the work that you do with incidents in EIM. A sample *Incident Detail* page is illustrated at the top of the next page.

SCs and Providers can see only the incidents that involve participants they provide services to.

You can open the table in the *Incident Detail* page in more than one way:

- Click the hyperlinked incident ID number found near the top-left corner of any document page above the green bar. The incident ID number is in blue type.

- Click an **Expand Details** icon, which appears on almost every page. You frequently see it above the Go To drop-down box. This icon is illustrated below and indicated by the callout.
  The **Expand Details** icon has a toggle action. Clicking it opens the table and changes the icon to the **Collapse Details** icon. Clicking the **Collapse Details** icon closes the table and changes the icon back to the **Expand Details** icon.
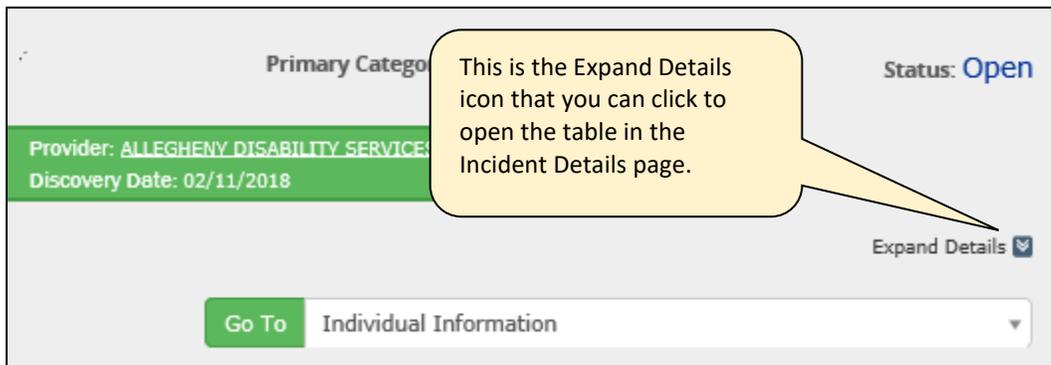
A sample *Incident Detail* page is illustrated below. Note the four different areas of the page, as noted by the callouts: **basic information, table, buttons** and **links**. Each area is fully described in this reference guide.

The top part of the *Incident Detail* window shows **basic information** on the incident.

Incident Detail

ID: 93661   Version: 10   Type: Individual Incident   Primary Category: Illness   Status: Open

Individual: PCG, CW   Provider: ALLEGHENY DISABILITY SERVICES   BACK
MCI: 208940721   Discovery Date: 07/27/2021

This **table** is the "workhorse" of EIM, where you access the different documents in the incident and can track their revisions and completions.

Clicking the **buttons** here open windows where you can link incidents, print summaries, etc.

	Status	Due Date	Action	Created Date	Created By	Last Edit Date	Edited By		Re Ext
	ubmitted	7/28/2021		7/27/2021	OLTLAlleg... PCG	7/27/2021	OLTLAlleg PC		
	ubmitted	8/26/2021		7/27/2021	OLTLAlleg... PCG	7/27/2021	OLTLAllegDSPro... PCG		
		7/28/2021		7/27/2021	OLTLAlleg... PCG	7/27/2021	BerksCounty, PCG		☐
+	Initial Regional Management Review	Created	7/28/2021		7/27/2021	OLTLAlleg... PCG			☐
+	County Management Review	In Progress	8/26/2021	VALIDATE SUBMIT	7/27/2021	OLTLAlleg... PCG	7/27/2021	BerksCounty, PCG	☐

PRINT SUMMARY 🖨   SC COMMENTS 📄   MARK AS CONFIDENTIAL 🔒   LINK T /C

DELETE 🗑

Any **links** between the current incident and other incidents or the current incidents and complaints are listed in this area of the page.

Linked Incidents/Complaints

ID	Program Office Name	Incident Type	Primary Category	Discovery Date	Status	Action
			No records to display.			

See the separate tip sheet *Understanding the Toolbars on the EIM Screen* for details on the icons at the top of each page, as well as the buttons and menu at the bottom of every page of EIM.

Understanding the Basic Information Area of the *Incident Details* Page

The top of the Incident Details page displays basic, overarching information on the incident. See the numbered items in the illustration below and their identification in the chart that starts on the next page. This chart identifies and explains how you use the data found there.
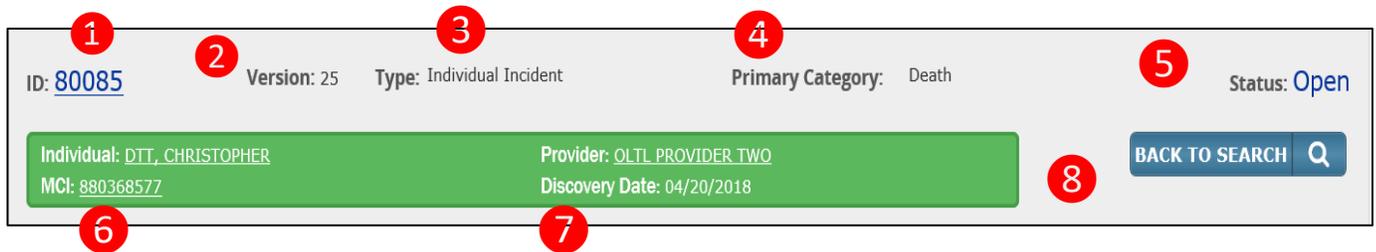
This chart identifies and describes the items called out by number in the illustration on page 4 of the basic information area of the *Incident Detail* page.

ID	Feature	Comments
❶	ID number (hyperlinked)	The ID number identifies the incident throughout the EIM system. It always appears in this location in **ANY** EIM screen. Clicking this link opens the Incident Details page for the incident.
❷	Version ID	The number that appears in this field identifies the version of EIM that you are running on your computer. As updates are made to EIM, this number increases.
❸	Type	There are two types of incidents, individual incidents and site incidents. Individual incidents have individual participants as their subjects. Site incidents are incidents relating to, say, a fire that breaks out in a facility or an emergency closure of a facility.
❹	Primary Category	The primary category of an incident is assigned as part of the first section and then can be changed as part of the verification of incident classification in the final section. See the EIM user guide *Entering the Incident First Section* for more details on the primary category. When hovering over the primary category, the secondary category(ies) will display. See an illustration at the bottom of this page.
❺	Status	The possible statuses of an incident are open, closed, deleted.
❻	Participant Name and MCI	The name of the individual participant who is the subject of this incident, and this participant's MCI appear here. The underlined name is a link, and clicking it opens a pop-up window with a capsule summary of the participant's demographic and basic plan information. See an illustration at the top of the next page. The MCI is a hyperlink, by clicking on the hyperlink the *Incident Detail* screen will display. See an illustration on the next page.

ID	Feature	Comments
❼	Provider Name and Incident Discovery Date	The name of the participant's provider (this provider may be a subject of this incident) and the discovery date of the incident appear here. The underlined name is a link, and clicking it opens a pop-up window with a capsule summary of the basic service location information. See an illustration below this chart.
❽	[Back To Search] Button	If you opened the Incident Details screen by clicking the ID link in a Search screen, clicking this button reopens that Search screen, where your entries and settings are preserved.

ID: 80085   Version: 25   Type: Individual Incident   Primary Category: Death

Individual: DTT, CHRISTOPHER   Provider: OLTL
MCI: 880368577   Discovery Date:

Secondary Category(s) :
Service Interruption

This is a sample of the secondary catergory(ies) that display when the user hovers over the Primary Category

Individual Information

MCI:	987848020
First Name:	JACK
Last Name:	PCG-EIMMR
Middle Initial:	
Suffix:	
Gender:	Male
Date of Birth:	01/01/1990
Individual's Address	
Address Line 1:	1300 MARKET ST
Address Line 2:	
Address Line 3:	
City:	PHILADELPHIA
Residential County:	Philadelphia
Funding County/Joinder:	PHILADELPHIA
Region:	Southeast
State:	Pennsylvania

This is a sample pop-up window that opens when you click the individual link that appears in the green bar.

Provider Information

Provider Name:	PCG ODP EIM PROVIDER THREE
MPI:	300443509
Service Location Provider Type:	03. Extended Care Facility
Service Location ID:	0001
Service Location Name:	Philadelphia Site One
Address Line 1:	1300 MARKET ST
Address Line 2:	
Address Line 3:	
City:	PHILADELPHIA
County:	Philadelphia
State:	Pennsylvania

This is a sample pop-up window that opens when you click the provider link that appears in the green bar.

EIM Enterprise Incident Management   HOME   SEARCH   REPORTS   HELP

Individual Detail

Name: PCG, CW	MCI: 208940721	SSN: XXX-XX-4050
Program Office: ODP-ID/A	Waiver/Program:	Residential County:

Export to Excel

ID	Program Office Name	Incident/Complaint	Type	Primary Category	Secondary Category	Discovery Date	Status
94144	ODP-ID/A	Incident	Individual Incident	Death	Natural Only		

This is a sample of the Individual Detail screen which displays when clicking the MCI Hyperlink. The Waiver/Program and Residential County fields will be blank and the [CREATE] button that allows users to initiate an incident will be hidden.

Using the Table in the *Incident Details* Page

The table serves two major purposes in EIM:

- It displays hyperlinked names of the different documents that EIM determines need to be completed at any given point in the process.
- It provides the means by which you can access and complete these documents, validate their readiness for submission and submit them.

Opening Documents from the Document Name Column

See the separate EIM user guides on entering first sections, final sections and reviews or investigations for details on using the links in the Document Name column.

After an incident is created (refer to any of the EIM user guides for *Entering the Incident First Section*), three documents are named in this column of the table: Incident First Section, Incident Final Section and Management Review. Each of the names is a hyperlink that, when clicked, opens the relevant pages of that document.

EIM has built-in controls that determine whether a link you click in this column opens a particular document. For instance, after a first section is started, you see links for the final section and the management review in this column. When you click either of these two links, the *Incident Detail* screen is redisplayed after the Please Wait window appears. The final section or the review cannot be opened until the first section has been submitted

The charts on the next page shows the possible document-name entries that can appear for individual incidents and complaints, along with the various prerequisite documents that must be completed for each.

Individual Incident

Document	Prerequisite Document(s)
First Section	NA
Initial Management Review* (County and Region)	First Section
Final Section	First Section Initial Management Review Provider Certified Investigator Report Provider Administrative Review
Management Review (County and Region)	First Section Final Section Initial Management Review
Review Investigation	First Section Final Section Initial Management Review Management Review

Interpreting the Status Column

EIM automatically updates the entries that appear in this column, based on the documents that have been successfully completed and submitted. The table below shows the possible statuses, the documents they apply to, and What these statuses signify.

Status	Document	Explanation

In Progress	<u>Incidents</u>
	    First Section
	    Final Section
	    Initial Management Review
	    Management Review
	    Review Investigation
	    Provider Certified Investigator Report
	    Provider Administrative Review
		This status indicates that the document has been initiated and is in the process of being worked in EIM.

Status	Document	Explanation

Submitted	<u>Incidents</u>
	    First Section
	    Final Section
	    Initial County Management Review
	    Initial Regional Management Review
	    County Management Review
	    Regional Management Review
	    Review Investigation
	    Provider Certified Investigator Report
	    Provider Administrative Review
		This status indicates that all pages of the document have been completed, and the document can become a component of the finished incident or complaint.

Reviewed	<u>Incidents</u>
	    First Section
	    Final Section
	    Initial County Management Review
	    Initial Regional Management Review
	    County Management Review
	    Regional Management Review
	    Review Investigation
		This status indicates that a submitted incident has been reviewed by a management authority to confirm the incident's accuracy and validity.

Created	<u>Incidents</u>
	    First Section
	    Final Section
	    Initial County Management Review
	    Initial Regional Management Review
	    County Management Review
	    Regional Management Review
	    Provider Certified Investigator Report
	    Provider Administrative Review
	    Review Investigation
		This status indicates that a particular document has been automatically created by EIM upon the submission of another, prior document, but the automatically created document has not yet been initiated by a user.

Pending	<u>Incidents</u>
	    County Management Review
	    Regional Management Review
		This status indicates that a management review has been disapproved, resulting in the creation of a new final section. In the interim while the completion of the new final section is underway, the status of this management review is pending.

Interpreting the Due Date Column

	Document Name	Status	Due Date	Action	Created Date	Created By	Last Edit Date	Edited By	Report Extension	Print
+	Incident First Section	Submitted	8/13/2021		8/12/2021	Three, Provider	8/12/2021	Three, Provider		☐
+	Incident Final Section	In Progress	3/9/2022		8/12/2021	Three, Provider	8/12/2021	SEONE, EIM	📄 [8]	☐
+	Initial County Management Review	Created	8/13/2021		8/12/2021	Three, Provider				☐
+	Initial Regional Management Review	Created	8/13/2021	INITIATE	8/12/2021	Three, Provider				☐
+	County Management Review	Created			8/12/2021	Three, Provider				☐

Collapse Details ⌃

PRINT SUMMARY 🖨   SC COMMENTS 📄   MARK AS CONFIDENTIAL 🔒   LINK TO INCIDENTS /COMPLAINTS 🔗   DOCUMENT UPLOAD 📎

Due Date

8/13/2021

3/9/2022

8/13/2021

8/13/2021

The due dates of documents vary with the document type. EIM automatically calculates and tracks the due dates of different documents, based on the completion or submission dates of the "upstream" documents. The chart on the next page summarizes the time spans that EIM uses.

Report extensions, which can alter and shift dates on some documents, are allowed on all documents except the first section. See the EIM reference guide *Entering Incident Report Extensions* for explanation of how extensions work and how they might affect the due dates you see in this column.

Due Dates in EIM

Document	Due Dates
First Section	Discovery date and time + 24 hours
Final Section *	Discovery date + 30 days
Initial County Management Review	Discovery date and time + 24 hours
Initial Regional Management Review	Discovery date and time + 24 hours
County Management Review Regional Management Review	Final Section Submission Date + 30 days
State Investigation	Same as parent management review
Provider Certified Investigator Report	Discovery date + 30 days
Provider Administrative Review	Discovery date + 30 days
Second Final Section (if needed)	Submission of Management Review causing new Final Section + 10 days
Second State Management Review	Final Section Submission + 30 days

* Report extensions are only allowed on Incident Final Sections

Using the Action Buttons

There are four possible action buttons that appear in the Incident Details page: [Initiate], [Validate], [Submit] and [Review].

EIM automatically determines which button to display, or not to display, for each of the incident and complaint documents. The determination is made based on:
- Which documents are submitted
- Which documents need to be completed and submitted
- Which documents are not yet initiated
- Your user role(s)

	Document Name	Status	Due Date	Action	Created Date	Created By	Last Edit Date	Edited By	Report Extension	Print
+	Incident First Section	Submitted	7/31/2021		7/30/2021	Three, Provider	7/30/2021	Three, Provider		☐
+	Incident Final Section	Submitted	4/25/2022		7/30/2021	Three, Provider	9/9/2021	Three, Provider	📄 [8]	☐
+	Initial County Management Review	Created	7/31/2021	INITIATE	7/30/2021	Three, Provider				☐
+	Initial Regional Management Review	Created	7/31/2021		7/30/2021	Three, Provider				☐
+	County Management Review	Created	10/9/2021	INITIATE	7/30/2021	Three, Provider				☐

VALIDATE
SUBMIT
VALIDATE
SUBMIT
INITIATE

This is an example of the possible Action buttons that may be present on the Incident Detail page.

Here are the basic circumstances that cause these buttons to be displayed and removed:

- The **[Initiate]** button appears when a document is first created by a process in EIM, for example, incident creation or successful submission of a first section. Clicking the [Initiate] button changes the document's status from "Created" to 'In Progress," and the [Validate] and [Submit] buttons then appear. These two buttons remain in the table while the document is being worked.
- The **[Validate]** button is clicked to test whether the document is ready for submission.

- The **[Submit]** button is clicked to submit the document. Successful submission removes the [Submit] button from the screen. If the successfully submitted document is subject to review, EIM automatically creates a review document (with the "Created" status). This review document appears on a new row of the table in the Incident Details screen. However, no buttons appear on the screen of the submitter, but an [Initiate] button does appear on the screen of the reviewer.

Interpreting the Created Date, Created By, Last Edit Date, Edited By Columns

	Document Name	Status	Due Date	Action	Created Date	Created By	Last Edit Date	Edited By	Report Extension	Print
+	Incident First Section	Submitted	7/31/2021		7/30/2021	Three, Provider	7/30/2021	Three, Provider		☐
+	Incident Final Section	Submitted	4/25/2022		7/30/2021	Three, Provider	9/9/2021	Three, Provider	📄 [8]	☐
+	Initial County Management Review	Created	7/31/2021	INITIATE	7/30/2021	Three, Provider				☐
+	Initial Regional Management Review	Created	7/31/2021		7/30/2021	Three, Provider				☐
+	County Management Review	Created	10/9/2021	INITIATE	7/30/2021	Three, Provider				☐

Created Date	Created By	Last Edit Date	Edited By
7/30/2021	Three, Provider	7/30/2021	Three, Provider
7/30/2021	Three, Provider	9/9/2021	Three, Provider
7/30/2021	Three, Provider		
7/30/2021	Three, Provider		
7/30/2021	Three, Provider		

EIM automatically updates the entries that appear in these columns, based on when the documents have been edited or modified and by whom. In general, the headings to these columns are self-explanatory. There is one exception:

On both the *Incident Detail* and the *Complaint Detail* pages, the Last Edit Date and Edited By columns are blank when the associated documents have a status of Created. EIM captures the values, but these values are hidden from display on the EIM screen (as shown above). When a document is initiated, the Last Edit Date field and Edited By values are updated and displayed on the screen. From that point on, this data is updated as described by the columns.

Interpreting the Report Extension and Print Columns

	Document Name	Status	Due Date	Action	Created Date	Created By	Last Edit Date	Edited By	Extension	Print
+	Incident First Section	Submitted	8/13/2021		8/12/2021	Three, Provider	8/12/2021	Three, Provider		☐
+	Incident Final Section	In Progress	3/9/2022	VALIDATE SUBMIT	8/12/2021	Three, Provider	8/12/2021	SEONE, EIM	📄 [8]	☐
+	Initial County Management Review	Created	8/13/2021		8/12/2021	Three, Provider				☐
+	Initial Regional Management Review	In Progress	8/13/2021		8/12/2021	Three, Provider	9/9/2021	SEONE, EIM		☐
+	County Management Review	Created			8/12/2021	Three, Provider				☐

Report Extension

📄 [8]
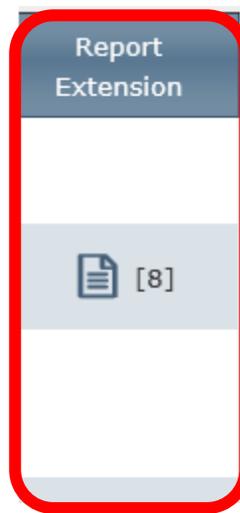
When document names other than just the incident first section appear in the table, icons appear in the Report Extension column. No extension option is possible for first sections. However, the final section has this capability. Clicking the report extension icon displays the Report Extension will display the Report Extension screen.

See the EIM tip sheet *Entering Incident Report Extensions* for detailed instructions on the use of the **Report Extension** icons.
The number of extensions for the section will be listed in the column. In this example there has been one (1) extension requested.

The check boxes in the Print column provide a way for you to select only specific documents to print. Checking a check box and clicking the [Print Summary] button opens a printable PDF file of just the document named in that row of the table. See also the section "*Understanding the Buttons*" on the next page.

See the EIM reference guide *Printing Documents, Summaries and Abstracts* for detailed background and instructions on the use of these check boxes.

Understanding the Buttons

Under the table in both the *Incident Detail* and the *Complaint Detail* pages is a group of buttons that you can click to perform different functions with the data in EIM. Which buttons you see on the Incident Detail page is dependent to a certain extent on your roles as well as other conditions in EIM. EIM automatically determines which buttons are displayed for your use.

The illustration below shows a sampling of different buttons that can appear in an *Incident Detail* or *Complaint Detail* page. At various points in your processing of incidents and complaints, you may see more, or fewer, buttons. See the *EIM User Manual* for additional information related to these buttons and their functionality.

PRINT SUMMARY	REASSIGN POINT PERSON	SC COMMENTS	MARK AS CONFIDENTIAL	LINK TO INCIDENTS /COMPLAINTS
DOCUMENT UPLOAD [2]	DELETE			

The DOCUMENT UPLOAD button displays the number of documents that have been uploaded for the incident.

Listing Linked Incidents and Complaints

The table under the buttons displays a listing of all incidents and complaints that are linked to one another using the button described above. Basic information is given in the table for each link.

Linked Incidents/Complaints

ID	Program Office Name	Incident Type	Primary Category	Discovery Date	Status	Action
94357	ODP-ID/A	Individual Incident	Abuse	8/25/2021	Open	Remove ⊘