




PSMS File Management/Work Done On File Steps

Step 1 – To access the file

Option 1:

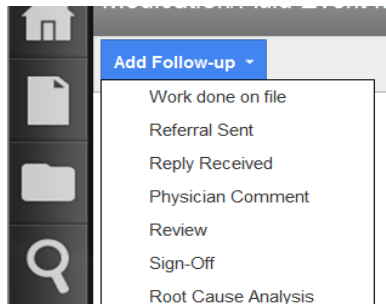
- Manager/Supervisor/Clinical lead goes to the Info Center .
- Selects file to review by clicking on the underlined **File ID** number i.e.: 12345.

Option 2:

- When completing an event form that you will be doing the file management/work done on file select the **More Actions** tab at the bottom right hand side of the event form and then select **SUBMIT AND MANAGE**. This function will submit your event and bring you to the file management/work done on file page.

Step 2 – To complete the follow up work on the file

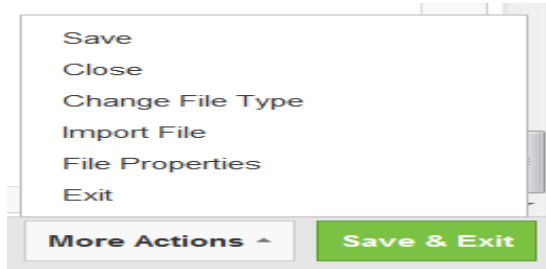
- Manager/Supervisor/Clinical lead selects **Add Follow Up** located in upper left hand corner of screen. Then selects **Work Done on File**. In this window complete all necessary fields/documentation. When work done on file is completed then select **ADD**.



After selecting **ADD** this will automatically save your work done on file and then places the File State into **In-progress**. (**Note: The file must be “in-progress” in order to access the drop down selection and change the current state under the “Status/Ownership” tab within FILE PROPERTIES**)


Step 3 – To change file status to Reviewed

- Manager/Supervisor/Clinical lead completes their review with the following steps below.
- To change the file property status on the file. Click on the **More Actions** box at the bottom right hand of the screen and from the drop down options then select **File Properties**.



- Under File Properties select the **Status and Ownership** tab in the top/center.
- At **Current Status:** select **Reviewed** from drop down list if you are a not responsible for resolving the incident.
- Click on **Save** button and then **OK**.


Note

- If you select your **Info Centre**  - you will now see the **Risk Status** states **Reviewed**.

Step 4 - To change file status to Resolved for Managers

- Manager goes to **Info center** and selects file that has a risk status of reviewed and opens file. If more work is to be done on the file. Repeat **Step 2**.
- Follow **Step 4** except change **Current State** to **“Resolved” for Events with severity level 1 to 5 if all work done on file is complete.**

Step 5 - To close files with a Severity level 1 or 2 for Managers

- Events with a **severity level 1 & 2:** For a Manager to close a resolved incident **level 1 or 2** go to the right hand bottom side of the page and select **More Actions** from the drop down list then select **“Close”**. Ensure **“Resolved”** is the status. Then select **OK**.
- To **close multiple incidents** of **Severity level 1 & 2:** In your **Info Centre**  select your **“Resolved”** files by selecting the boxes then select at top of page **MORE** and from that drop down list select **Change State** then select **Execute**. Then select Done.
- To exit PSMS: Select **Logged in as** on the top right hand side of the page. Click the drop down list and select **Logout**.