



Area Office/Facility Quick Guide

This document is meant for use by the following roles: Area Facility Director Designee, Area Office Investigation Designee, Regional Director Designee, Regional Director Investigation Designee, and Assistant Commissioner for Facilities.

To Create and Issue an Action Plan/Resolution

Screen Name: Switchboard

Steps:

1. Click on QM
2. Click on Investigations
3. Click Data Entry
4. Click the Create link under the Action Plan/Resolution header

Screen Name: Action Plan/Resolution

Steps:

5. Enter all information for the first action
6. Click Save
7. Click Add
8. Enter all information for the next action
9. Repeat Steps 6-8 for each additional action
10. Click Issue Action Plan/Resolution button

To Enter and Finalize Action Plan/Resolution Outcomes

Screen Name: Switchboard

Steps:

1. Click on QM
2. Click on Investigations
3. Click Data Entry
4. Click the Issued link under the Action Plan/Resolution header

Screen Name: Action Plan/Resolution Screen

Steps:

5. The Action Plan/Resolution screen appears
6. Click Continue

**Screen Name:** Action Plan/Resolution Outcomes**Steps:**

7. The Action Plan/Resolution Outcomes screen appears
8. Enter all mandatory information
9. Click Save
10. Click the radio button for the next action
11. Click Edit
12. Enter all Mandatory information
13. Click Save
14. Repeat steps 10-13 for each additional action
15. Click the Finalize button

To Create an Administrative Review**Screen Name:** Switchboard**Steps:**

1. Click on QM
2. Click on Investigations
3. Click on Data Entry
4. Click on the Create link under the Administrative Review header

Screen Name: Administrative Review**Steps:**

5. Enter all mandatory information
6. Click Finalize

For Facility Users: Title 19 Process**Screen Name:** Switchboard**Steps:**

1. Click on QM
2. Click on Investigations
3. Click on Data Entry
4. Click on the Create link under the Facility Complaint Review header

Screen Name: Facility Complaint Review**Steps:**

5. Enter information and place check marks next to all mandatory fields
6. Click Finalize



To View Investigator Title 19 Form

Screen Name: Switchboard

Steps:

1. Click QM
2. Click Investigations
3. Click Data Entry
4. Click Investigators Title 19 Form link

To View Appeals

Screen Name: Switchboard

Steps:

1. Click QM
2. Click Investigations
3. Click Data Entry
4. Click Appeals link

To Search For A Case

Screen Name: Case Search

Steps:

1. Click on QM
2. Click on Investigations
3. Click Data Entry
4. Click Search



Printing Information from HCSIS – Where to go

Printable Summary Screen (QM > Investigations > Printable Summary)
DPPC Intake
Investigations Notices List Screen (QM > Investigations > Notices)
Decision Letter
Disposition Letter
Public Log Report
Redacted Investigation Report
Action Plan Resolution Report
Facility Complaint Review and Action Report (For Facility Users)
Investigations Reports List Screen (QM > Reports > Reports Request)
Action Plan/Resolution Report
Investigations Counts Report
Investigations Outstanding Summary Report
QE Provider Investigation Report

To View Alerts

Screen Name: Pending Alerts

Steps:

1. Click Home
2. Click Alerts



A list of the alerts sent to the Area/Facility Director Designee, and the Area Office Investigations Designee is listed below.

Alert Audience	Alert Subject/Title	Alert Trigger	Hyperlink Destination
Area/Facility Director Designee and Area Office Investigation Designee	Disposition Entered	User enters disposition information and clicks Finalize on the Disposition screen.	Investigations Notices
Area/Facility Director Designee and Area Office Investigation Designee	Disposition Changed	User enters disposition information and clicks Finalize on the Disposition screen	Investigations Notices
Area/Facility Director	Investigator Title 19 Form Finalized	User clicks Finalize on the Investigator Title 19 Form	Switchboard
Area/Facility Director Designee and Area Office Investigation Designee	Decision Letter Issued	User enters the date of the decision letter.	Investigations Notices
Area/Facility Director Designee and Area Office Investigation Designee	Action Plan/Resolution Issued	User clicks the Issued button of the Action Plan/Resolution screen.	Switchboard
Area/Facility Director Designee and Area Office Investigation Designee	Revised Action Plan/Resolution Issued	User clicks the Issued button of the Action Plan/Resolution screen for a case with an appeal that resulted in a revised Action Plan.	Switchboard
Area/Facility Director Designee and Area Office Investigation Designee	Action Plan/Resolution Finalized	User clicks the Finalize button of the Action Plan/Resolution Outcomes screen..	Switchboard
Area/Facility Director Designee and Area Office Investigation Designee	Appeal Filed	User clicks the Save and Continue button on the Appeal Information screen after adding a new appeal entry.	Appeal Information
Area/Facility Director Designee and Area Office Investigation Designee	Appeal Finalized	User clicks the Save and Generate Documents button on the Appeal Information Screen after entering the appeal decision	Appeal Information



Alert Audience	Alert Subject/Title	Alert Trigger	Hyperlink Destination
Area/Facility Director Designee and Area Office Investigation Designee	Intake to Existing Case	User clicks the Link Intake to Case button on the Involved Parties screen	Switchboard
Area/Facility Director Designee and Area Office Investigation Designee	A new Investigation Case has been created for an Alleged Victim in your Area/Facility	User selects an Area / Facility for the case that is different than an ALV's Area/Facility	n/a
Area/Facility Director Designee and Area Office Investigation Designee	Case Assignment has been changed	User changes the Investigation Office or the Area/Facility on the Case Assignment screen and clicks Save or Save and Continue	Switchboard



A list of the alerts sent to the Regional Director Designee, the Regional Director Investigations Designee, and the Assistant Commissioner for Facilities is listed below.

Alert Audience	Alert Subject/Title	Alert Trigger	Hyperlink Destination
Regional Director Invest. Designee	Disposition Entered	User enters disposition information and clicks Finalize on the Disposition screen.	Investigations Notices
Regional Director Invest. Designee	Disposition Changed	User enters disposition information and clicks Finalize on the Disposition screen	Investigations Notices
Regional Director Invest. Designee	Updated Intake Received	Updated Intake for a Case that has a Finalized Disposition is loaded into HCSIS	Intake Information
Regional Director Designee, Regional Director Invest. Designee and Asst. Comm. for Facilities	Decision Letter Issued	User enters the date of the decision letter.	Investigations Notices
Regional Director Designee, Regional Director Invest. Designee and Asst. Comm. for Facilities	Appeal Filed	User clicks the Save and Continue button on the Appeal Information screen after adding a new appeal entry.	Appeal Information
Regional Director Designee, Regional Director Invest. Designee and Asst. Comm. for Facilities	Appeal Finalized	User clicks the Save and Generate Documents button on the Appeal Information Screen after entering the appeal decision	Appeal Information
Regional Director Designee and Regional Director Invest. Designee	Intake to Existing Case	User clicks the Link Intake to Case button on the Involved Parties screen	Switchboard
Regional Director Invest. Designee	A new Investigation Case has been created for an Alleged Victim in your Area/Facility	User selects an Area / Facility for the case that is different than an ALV's Area/Facility	n/a
Regional Director Designee and Regional Director Invest. Designee	Case Assignment has been changed	User changes the Investigation Office or the Area/Facility on the Case Assignment screen and clicks Save or Save and Continue	Switchboard