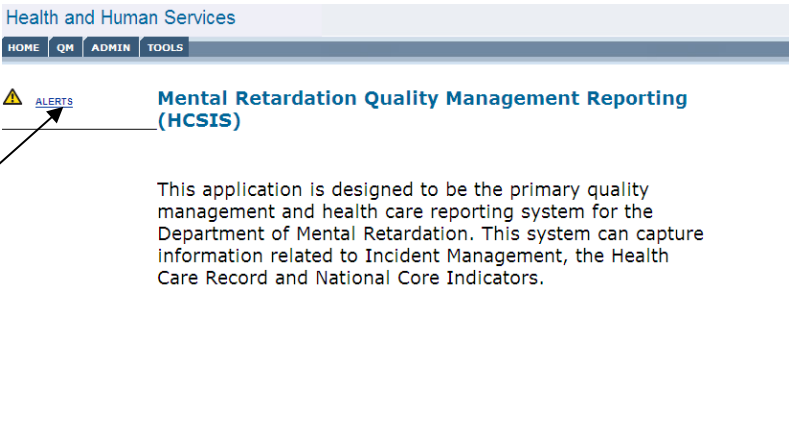
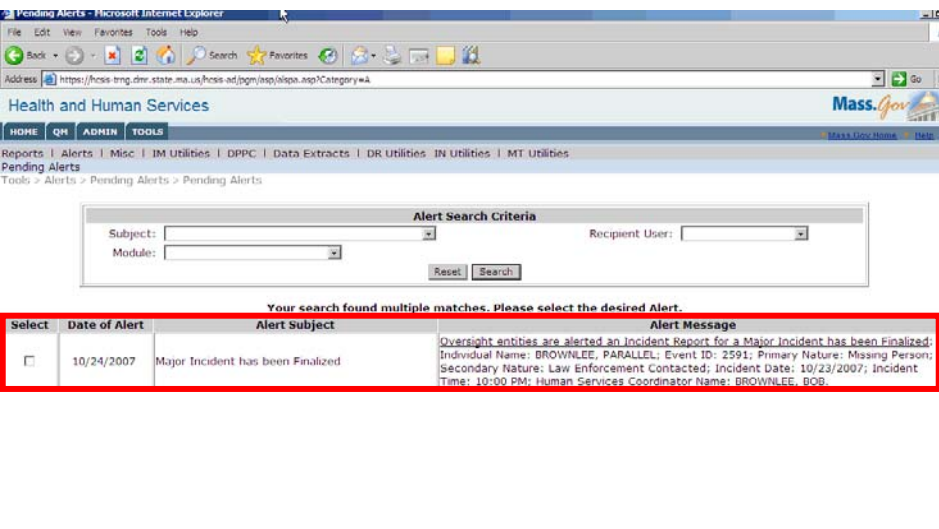


Incident Management Area Office Management Review Quick Guide

Area Office Management Review	
<p>1. SC, SCS or Area Director Designee logs into HCSIS. Navigates to the Alerts screen by clicking on the <u>Alerts</u> link on the left side of the home page.</p>	
<p>2. The user is redirected to the Pending Alerts screen where there is a filter and then a list of pending alerts.</p> <p>3. From the list of pending Alerts, the user clicks on the underlined <u>Alert</u> that indicates an initial report has been finalized.</p>	
<p>Note : Service Coordinators may review both Major and Minor Incidents and enter their comments on the Area Office Management Review, and Approve or Not Approve the IR. The Service Coordinator Supervisor finalizes the Area Office Review for Minor Incidents. Major Incident Reports are reviewed and finalized by the Area Director-Facility/Designee.</p>	

Incident Management Area Office Management Review Quick Guide

Switchboard

4. The Switchboard screen appears with the list of documents.

5. User clicks the **Create** link under the Area Office Management Review label.

6. User is redirected to the Area Office Management Review Screen.

The screenshot shows the 'Switchboard' interface. At the top, there are navigation tabs: HOME, QM, ADMIN, TOOLS. Below this is a breadcrumb trail: HCR > IM > Event Data Entry > Switch Board. A search bar is present. The main content area displays incident information for Incident ID: 1472, dated 11/16/2006. Under the heading 'Incident Management Documents', there is a link for 'Initial Report Submitted - Created: 11/17/2006'. Below that, under 'Area Office Management Review', the 'Create' link is circled in red. Other sections include 'Action Steps Follow-up'.

Note: Mandatory fields are identified with a **red** asterisk.

7. User completes all mandatory fields.


8. If all is correct, user clicks the **Finalize** button.

The screenshot shows the 'Management Review Details' form in a Microsoft Internet Explorer browser window. The browser address bar shows the URL: https://hcsis-trng.dmr.state.ma.us/hcsis-m4q/im/pgm/imprd.aspx?ManagementReviewId=1709. The page title is 'Health and Human Services'. The form contains the following information:

- Individual Information:** Name: BROWNEE, PARALLEL; SSN: XXX-XX-6644; DOB: 5/5/1955
- Incident Information:** Incident ID: 2591; Incident Date: 10/23/2007
- Area Office Management Review Details:**
 - Primary Category of Incident: Missing Person
 - Secondary Category of Incident: Law Enforcement Contacted
 - Are the current categories correct? *
 - Review Status: Yes
 - Primary Reason for non-approval: (empty)
 - Followup Date: (MM/DD/YYYY)
 - Comments/Recommendations: (empty text area)

A callout box points to the 'Are the current categories correct? *' field with the text: 'New question: to verify categories.' At the bottom of the form, there are buttons for 'Reset', 'Save', 'Check Spelling', and 'Finalize'. The 'Finalize' button is circled in red.

Incident Management
Area Office Management Review Quick Guide

Incorrect Categorization by Filing Agency	
<p>9. User decides the current categories are not correct.</p> <p>10. User states whether the filing agency has been notified.</p> <p>11. User changes the incident categories.</p>	<div style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> <p>Area Office Management Review Details</p> <p>Primary Category of Incident:</p> <p>Secondary Category of Incident:</p> <p>Are the current categories correct? *</p> <p>If No, has the filing agency been contacted and agreed to the change in category? *</p> <p>If No, Primary Category of Incident:*</p> <p>If No, Secondary Category of Incident:*</p> <p>Should this incident be treated as a Major Incident? *</p> <p>Please confirm the incident meets the criteria for escalation to Major incident:</p> <p>Review Status:</p> <p>Primary Reason for non-approval:</p> <p>Followup Date: (MM/DD/YYYY)</p> </div> <div style="border: 1px solid black; border-radius: 15px; padding: 5px; width: fit-content; margin-left: 20px;"> <p>By choosing "No," other questions regarding filing agency and incident categories appear.</p> </div>
Primary Incident Category drop-down list	
<p>12. User chooses correct primary category.</p>	 <p>The screenshot shows the 'Area Office Management Review Details' section of a web application. It includes a navigation bar with 'HOME', 'QM', 'ADMIN', and 'TOOLS'. Below the navigation bar are several tabs: 'Individual Information', 'Incident Information', and 'Primary'. The 'Individual Information' tab is active, showing details for 'Name: BROWNLEE, PARALLEL', 'SSN: XXX-XX-6644', 'DOB: 5/5/1955', and 'Gender'. The 'Incident Information' tab shows 'Incident ID: 2264' and 'Incident Date: 8/1/2007'. The 'Area Office Management Review Details' section contains several fields: 'Primary Category of Incident: Physical Altercation', 'Secondary Category of Incident: Individual to Individual, Alleged Victim', 'Are the current categories correct? *' (set to 'No'), 'If No, has the filing agency been contacted and agreed to the change in category? *' (set to 'No'), 'If No, Primary Category of Incident: *', 'If No, Secondary Category of Incident: *', 'Should this incident be treated as a Major Incident? *', 'Please confirm the incident meets the criteria for escalation to Major incident:', 'Review Status:', 'Primary Reason for non-approval:', 'Followup Date: (MM/DD/YYYY)', and 'Comments/Recommendations:'. A dropdown menu is open for the 'Physical Altercation' field, showing a list of options: 'Physical Altercation', 'Medical Treatment Resulting From Injury', 'Fire', 'Suspected Mistreatment', 'Physical Altercation' (highlighted), 'Property Damage', 'Theft', 'Other Criminal Activity', 'Transportation Accident', 'Emergency Relocation', 'Unplanned Transportation Restraint', and 'Other'.</p>

Incident Management Area Office Management Review Quick Guide

Secondary Incident Category drop-down list

13. User chooses correct Secondary Incident Category.

Health and Human Services

HOME QM ADMIN TOOLS

HCR | IM | Death Reporting | NCI | Investigations | Reports
Event Data Entry | Restricted Access | Report Extension | Filing Process Mgt. | Review Process Mgt.
QM > IM > Event Data Entry > Management Review

Search

Individual Information	Name: BROWNLEE, PARALLEL	SSN: XXX-XX-6644	DOB: 5/5/1955
Incident Information	Incident ID: 2264	Incident Date: 8/1/2007	

Area Office Management Review Details

Primary Category of Incident: Physical Altercation

Secondary Category of Incident: Individual to Individual, Alleged Victim

Are the current categories correct? * No

If No, has the filing agency been contacted and agreed to the change in category? * Yes

If No, Primary Category of Incident: * Fire

If No, Secondary Category of Incident: * Intentional - Not Started By Individual

Review Status: Not Approved

Primary Reason for non-approval: Approved with Modification to category

Followup Date: (MM/DD/YYYY)

Comments/Recommendations:

Review Status drop-down lists

14. User chooses Review Status.

15. Clicks Finalize.

Health and Human Services

HOME QM ADMIN TOOLS

HCR | IM | Death Reporting | NCI | Investigations | Reports
Event Data Entry | Restricted Access | Report Extension | Filing Process Mgt. | Review Process Mgt.
QM > IM > Event Data Entry > Management Review

Operation successful.

Search

Individual Information	Name: BROWNLEE, PARALLEL	SSN: XXX-XX-6644	DOB: 5/5/1955	Gender: Female	Area Office: Springfield/Westfield
Incident Information	Incident ID: 2264	Incident Date: 8/1/2007	Primary Incident Nature: Physical Altercation		

Area Office Management Review Details

Primary Category of Incident: Physical Altercation

Secondary Category of Incident: Individual to Individual, Alleged Victim

Are the current categories correct? * No

If No, has the filing agency been contacted and agreed to the change in category? * Yes

If No, Primary Category of Incident: * Fire

If No, Secondary Category of Incident: * Intentional - Not Started By Individual

Review Status: Not Approved

Primary Reason for non-approval: Incorrect Categorization

Comments/Recommendations:
NARRATIVE HERE IF NEEDED

Incident Management Area Office Management Review Quick Guide

Switchboard

16. How the Switchboard looks with "Not Approved."

Health and Human Services Mass.gov

[HOME](#) [QM](#) [ADMIN](#) [TOOLS](#)

[HCR](#) | [IM](#) | [Death Reporting](#) | [NCI](#) | [Investigations](#) | [Reports](#)
[Event Data Entry](#) | [Restricted Access](#) | [Report Extension](#) | [Filing Process Mgt.](#) | [Review Process Mgt.](#)
[QM](#) > [IM](#) > [Event Data Entry](#) > [Switch Board](#)

[Search](#)

[Incident Notification Printable Summary](#)
[Printable Incident Summary](#)
[Incident Report Download \(PDF\)](#)
[Incident Report Download \(RTF\)](#)

Individual Information	Name: BROWNLEE, PARALLEL	SSN: XXX-XX-6644	DOB: 5/5/1955	Gender: Female	Area Office: Springfield/Westfield
Incident Information	Incident ID: 2264	Incident Date: 8/1/2007	Primary Incident Nature: Fire		

Incident Management Documents:

Incident Report

Created: 08/02/2007; Finalized: 11/07/2007; Area Approval: Not Approved
Created: 11/07/2007; Initial Report Submitted: 08/02/2007

Area Office Management Review

Created: 11/07/2007; Finalized-Not Approved: 11/07/2007
[Create](#)

Regional Office Management Review

Action Steps Follow-up

Alerts appear to the filing agency.

Alert Subject	Alert Message
Area Office has not approved an Incident Report	Area Office has not approved an Incident Report: Individual Name: BROWNLEE, PARALLEL; Event ID: 2264; Primary Nature: Fire; Secondary Nature: Intentional - Not Started By Individual; Incident Date: 08/01/2007; Incident Time: 11:30 PM; Human Services Coordinator Name: BROWNLEE, BOB; Categories Changed by Area Office?: Yes

updated 11.16.2007
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