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Authorized signature

Number: APD-AR-20-082

Issue date: 10/6/2020

UPDATED

Topic: Developmental Disabilities

Subject: Incident Management Team meetings draft quarterly reporting form

 Applies to (check all that apply):

☐ All DHS employees
☐ Area Agencies on Aging: {Select type}
☐ Aging and People with Disabilities
☐ Self Sufficiency Programs
☒ County DD program managers
☒ Support Service Brokerage Directors
☒ ODDS Children’s Residential Services
☐ Child Welfare Programs
☐ County Mental Health Directors
☐ Health Services
☐ Office of Developmental Disabilities Services (ODDS)
☒ ODDS Children’s Intensive In Home Services
☐ Stabilization and Crisis Unit (SACU)
☐ Other (please specify):

Action required: Action Request 20-082 has been changed. Given the combined factors of the pandemic and wildfires, it was identified that requiring Case Management Entities (CME) to complete the full statistical review by October 1, 2020 was not realistic. The full report and statistical analysis of Serious Incidents (SI) and abuse trends will be required of CMEs at a future date which will be announced in a future Action Request (AR).

Until that date, ODDS has created a simplified report. All CMEs must complete the following on a quarterly basis:

→ Hold an Incident Management Team (IMT) meeting.
→ Review all SIs and abuse that occurred during the quarter.
→ Complete the simplified report available here
→ Submit the simplified report following the directions within the form itself.

Reports are due on the following schedule:

Q1 2020 (January, February, March) – Not required
Q2 2020 (April, May, June) – Monday, November 2\textsuperscript{nd}, 2020
Q3 2020 (July, August, September) – Monday, January 4\textsuperscript{th}, 2021
Q4 2020 (October, November, December) – Monday, March 1\textsuperscript{st}, 2021
When ODDS determines that the full statistical review process is feasible, all CMEs will be expected to complete a full trend analysis of SIs and abuse. ODDS will issue additional guidance, provide training and overview of the complete statistical review and trend analysis form and provide CMEs with an opportunity to give feedback on the full trend analysis form and process at that time. ODDS will issue a new Action Request when the process will shift from the simplified form required in this Action Request to the full statistical review and trend analysis.

ODDS Quality Improvement will be providing technical assistance every other Tuesday from 1-3pm to help with questions regarding data reports, pulling and filtering data, etc. Dates are as follows: October 6, Oct. 20, Nov. 3, Nov. 17, and Dec. 1. An email will be sent to Brokerage Directors and CDDP Program Managers with the calendar invite.

**Reason for action:** The ODDS 1915(c) waiver requires ODDS to ensure that CMEs develop incident management teams which convene at least quarterly to identify trends, develop local and system-wide responses, and identify preventive actions to address system deficiencies or emerging concerns that could potentially harm individuals served. OAR 411-415-0055(1)(e) requires that each CME to form an Incident Management Team (IMT) to review Serious Incidents (SI). The CME must submit findings to the Department quarterly on a format determined by the Department.

**Field/stakeholder review:** ☐ Yes ☑ No

If yes, reviewed by:

If you have any questions about this policy transmittal contact:
Kirsten.G.Collins@dhsoha.state.or.us
The purpose of this guide is to show the logic behind Reports building in CAM. Given the varied options one has access to while building their criteria for their report, our aim is to teach the software’s logic and not display all available options. First, this guide will show you how to modify a pre-existing (canned) report in CAM. Second, this guide will walk you through creating a new report. Most of the guide will focus on editing a canned report, since the logic for creating a new report is the same as editing a pre-existing one.

How to Modify a Pre-existing Report

**Step 1:** Identify what topic you’d like to build your report on within the pre-made Reports in the folders on the left hand side of the Reports page.

**Note:** For this example, we are using the ‘DD SI’s with Recommended Actions’ report.

Using the ‘Find a folder...’ on the left hand side of the page, you can search for the pre-existing report you’d like to customize. From this search, when you click on the folder you wish to build a report from, all reports contained in that folder will be displayed in the center of the page, as seen below.
By double clicking on the Report you wish to run, the report will open and look similar to the following:

**DD SI's with Recommended Actions**

Report Generation Status: Complete

Report Options:
- Summarize information by: Result
- Show: All serious incidents

**Time Frame**
- Date Field: Created Date

**Filtered By:** Edit
- Responsible Program equals DD Clear

**Grouped By:** Result
**Sorted By:** Result

<table>
<thead>
<tr>
<th>Serious Incident Number</th>
<th>Recommended Action #</th>
<th>Client: Person/Service Provider Name</th>
<th>Responsible Party</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>SI-01583</td>
<td>RA - 01240</td>
<td>IDD A CL16</td>
<td>Service Provider</td>
<td>1/24/2020</td>
</tr>
<tr>
<td>SI-01595</td>
<td>RA - 01248</td>
<td>IDD A CL15</td>
<td>Service Provider</td>
<td>1/24/2020</td>
</tr>
<tr>
<td>SI-01650</td>
<td>RA - 01293</td>
<td>IDD D CL576</td>
<td>Service Provider</td>
<td>3/1/2020</td>
</tr>
<tr>
<td>SI-01660</td>
<td>RA - 01283</td>
<td>IDD D CL576</td>
<td>Licensor</td>
<td>1/30/2020</td>
</tr>
<tr>
<td>SI-01677</td>
<td>RA - 01317</td>
<td>IDD D CL511</td>
<td>Service Provider</td>
<td>1/30/2020</td>
</tr>
</tbody>
</table>

Result: Unknown (4 records)

Result: Incomplete (1 record)

Creating Data Reports  February 2020
Step 2: On this page you have several options. By clicking the buttons above the report, you can: ‘Run Report’ again, ‘Save As’ into your personal folder and ‘Customize’ the report.

By clicking on the ‘Customize’ button, you are taken into the editing page:

Note: On the left hand side of the editing page there are Fields you can select to use as additional layers within your report. If you want to add a reportable Field (e.g.: Serious Incident Owners, Due Dates, SI types) this section is where you can select additional fields from:
Step 3: You can either type what Field you wish to add inside the Quick Find text box, or you can scroll to what field you wish to select. Once you identify which field you want to add, you can double click on the field or click and drag the field over into your report.

Note: In a similar fashion, unnecessary Fields can be removed from the report by dragging and dropping the column header, "Field", into the left hand Fields window.
**Step 4:** Additional Fields can be added and narrowed by using the ‘Filters’ feature at the top of the page.

The first field contains the same options one can find in the Fields window (as displayed on the previous page). Fields can either be found by clicking the down arrow next to the description of the Field, or by typing into the description field.

**Note:** Spelling must be correct for the system to find the Field you are searching for.

Next, you will have to specify the criteria you wish to display the initial field from. For example: If you are trying to add a filter that shows a specific County/Brokerage, the next section allows you to define to what logic County/Brokerage is used:

By clicking ‘Add’ beside the Filters section, additional options are presented at the top of the report.
The final step for adding the filter is to identify what information are you trying to sift out of the Field. For instance, if your filter begins with 'County/Brokerage', what County or Brokerage are you trying to display? Also, if the initial criteria for the filter was 'Status', then what status of your Serious Incident are you trying to see; all SI in process, SI in entry or Closed?

**Best Practice:** It is advised that the magnifying glass should be used if it is an option within your filter.

Next to the text bar is a magnifying glass. This feature will only display if the Field (ie: County/Brokerage) has multiple options. When you click on the magnifying glass it will show all the options available to you:

After the Filter is completed, you must hit 'OK' in order to add it. When it’s accepted by clicking ‘OK’ (located to the right of the magnifying glass), the filter criteria will be displayed above the report. If you do not select ‘OK’ you will receive an error message similar to below:

You can continue to add filters by clicking ‘Add’ again. If a filter is created that you no longer wish to use, scroll over the filter criteria to either Edit or Remove:
**Step 5**: Below the Filters section is Show, which is a drop-down list. This identifies what options you are trying to show. For example, if you only wanted to see Serious Incidents you created, then you’d want to click on ‘My serious incidents’. However, if you wanted to see all Serious Incidents within your CME or Agency, you’d need to select ‘All serious incidents’.

**Step 6**: Once you’ve added all desired Fields and Filters, you may want to narrow the date range of your report. If left untouched, the date field may not satisfy your need for the report. The inherent danger of customizing a pre-existing report is that the report may have a narrow date criteria that you may need to expand.

In the ‘Date Field’, you can select from an array of pre-populated date criteria. In the ‘Range’ field you can pick from a range of pre-populated dates (e.g.: Quarterly and Yearly). The ‘From’ and ‘To’ fields function by clicking on the calendar icon and selecting the desired date.

**Caution**: These are Salesforce ranges and may not align with your specific quarter.

An easier way to specify the date field would be to enter:
Date Field = Created Date, Range = All Time
Step 7: Now that the report contains your desired Fields/Filters and Date ranges, you can either: Save the report, Close it (losing all unsaved progress) or Run Report to display the report outside of the editing page before deciding to save it or close it out. Saving your report will not overwrite the original report you edited from. It will create a separate report, distinct from the pre-existing one in CAM.

When your report is finalized, and you Save it, it will save into your 'My Personal Custom Reports' folder within the Reports tab.
How to create a New report

**Step 1:** Select the Reports tab to return you to the Reports main page. Next to the page’s title, ‘Reports & Dashboards’, at the top of the page, there is a button that allows you to select a New Report or New Dashboard. Click ‘New Report’.

**Step 2:** You will need to select what type of report you’d like to build. Similar to choosing what pre-existing report you want to edit, on the left hand side of the page you are given folders to select your report type from. We are going to build a report based on Serious Incidents:
In the 'Select Report Type', you can either open the folders to find what type of report you want to build from, or you can write in the type next to the magnifying glass above the folders:

By typing 'Serious Incident', you are automatically taken into the 'Other Reports' folder. You'll notice many Serious Incident options are pre-loaded into CAM as potential report criteria. For example: if your report is trying to find all Serious Incidents related to Intake/Investigations, you can scroll to that specific report and select it as the base to further add criteria and filters to. The second option down is Serious Incidents without further criteria. When you find a broad title (Recommended actions, Person/Service Provider, etc.) that does not specify further criteria, that “base” allows you the flexibility to build your report from the ground up. For this guide we are only looking at Serious Incidents to build our example from. Once you click on Serious Incidents, you’ll need to click the ‘Create’ button on the bottom of the page.
Step 3 By clicking Create, you are taken to the Unsaved Report editing page. This is the same page that editing a pre-existing report is accomplished from.

Note: Before adding your criteria/filters and date ranges, you should collapse the options in your ‘Show’ field at the top of the page and select ‘All serious incidents’ from the drop down. This will allow you to see all Serious Incidents your role within CAM allows you access to.
Step 4: You are now able to add desired fields from the left hand Fields window, as well as apply Filters and date ranges. The logic to accomplish these tasks is the same as editing a pre-existing report in CAM.

Reminder: Remember to Save the report once you have added all the Fields/Filters before closing, or the report will be lost upon hitting Close.
Directions for the completion of the Incident Management Team reporting form

The following will clarify how to complete the IMT form. Brokerages have 10 steps and CDDPs have an additional two steps. Clicking on any step below will link you directly to the location in this document that explains that section.

1.) Identify which CME is completing the form
2.) Identify the date of the meeting
3.) Identify the time-period being reviewed
4.) Table of Contents
5.) IMT Meeting Participants
6.) Serous Entry Data
7.) Serious Incident Types
8.) Emerging Concerns
9.) Self-Review
10.) CAM System Review of SIs
    Directions for Brokerages to submit the IMT form
11.) CAM System Review of Abuse
12.) Abuse Data
    Directions for CDDPs to submit the IMT form
1. **Identify which CME is completing the form** by clicking on the down arrow next to the words “Choose CME”. Use the scroll bar to locate the CME name. CMEs are alphabetized.

**Identify if the review is for a specific county.** If the CME encompasses more than one county and the review is about only one county specifically use the down arrow next to the words “Specific County Review” and use the scroll bar to locate the specific county being reviewed. If the CME is reviewing all counties encompassed within the CME then simply choose “NA”
2. **Identify the date of the meeting** by clicking on the down arrow located next to the words “Click or tap to enter a date”. Please note that you can click the “today” button. Using this method ensures data integrity, as all of the dates will have the same format.
3.) **Identify the period being reviewed** by clicking on the down arrow located next to the words “Choose time period being reviewed”.

Enter the 4-digit year by clicking on the words “Enter 4-digit Year”. It is important that all four digits are entered for data integrity.

If the review is for a time period other than a specified quarter as identified within the drop-down box as shown in step #4, click the “other” box and identify the dates being reviewed. Identify the start date of the time-period being reviewed by clicking on the arrow at the end of the words “click or tap to enter a date” and just prior to the word “through”.

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**Directions for the completion of the Incident Management Team reporting form**

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**Table of Contents**

Do not enter information into this section following the completion of the “References” tab.

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**OBSOLETE**

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Directions for the completion of the Incident Management Team reporting form

Identify the end date of the time-period being reviewed by clicking on the arrow at the end of the words “click or tap to enter a date”.

The year for this review period has been identified as outlined in step #5.

If the review period has been identified as one of the quarters as identified in step #4 then skip this step and leave the “other” box unchecked.
4.) The **Table of Contents** will populate after completion of the remainder of the form. Do not enter any information into the table of contents. Once the CMEs Incident Management Team (IMT) has completed their meeting and the form has been completed in its entirety, return to the table of contents and click on the words “Table of Contents”. This will bring up a dialogue box allowing you to update the table. Click on the words “Update Table” and click the button to “Update entire table”. Click “OK”. This will update the table of contents with the information completed during the IMT meeting.
5.) **Identify who participated in the IMT meeting.** OAR 411415-0055(1)(e) prescribes minimum participation. Each IMT meeting must have a minimum of three participants. Brokerages should identify IMT meeting participants in the left-hand column. CDDPs should identify IMT meeting participants in the right-hand column.

a) Both Brokerages and CDDPs must have a management level staff attend each IMT meeting. Click on the words “Enter name of management level staff who participated in this review” to identify the name of the management level staff who participated in this IMT meeting.

2a. Brokerages must have a Personal Agent attend each IMT meeting. Click on the words “Enter name of PA who participated in this review” to identify the name of the PA who participated in this IMT meeting.

2b. CDDPs must have an abuse investigator attend each IMT meeting. Click on the words “Enter name of abuse investigator who participated in this review” to identify the name of the abuse investigator who participated in this IMT meeting.

3. To identify the third, and any other person participating click on the words “Enter title of other person who participated in this review” and enter the person’s title. Click on the words “Enter name of other person who participate in this review” and enter the person’s name.

If there were more than six participants in this IMT meeting, click the box at the bottom of the attendance sheet indicating that an additional sheet is attached. Ensure that the additional sheet follows the format: Title: Name.
6.) **Serious Incident Entry Data.** Information for this section of the IMT meeting should be pulled directly from CAM following the Quick Reference Guide located here:

   Each data point follows the same pattern as in the example below:

   Document the number of Serious Incidents (SIs) opened during the time-period identified in step #4 or #6 by clicking on the words “# of SIs opened”

   o Compare this to the number of SIs in the last reporting period. During the first IMT meeting this information may not be available. Click on the words “# of SIs opened for the previous reporting period” and either enter the number of SI opened during the previous reporting period or clarify why this information isn’t available.

   o Identify the trend by clicking on the down arrow next to the words “Trend Analysis”

   ▪ To maintain data integrity, identify if there is an increase or decrease from the previous reporting period.
   ▪ A CME can identify that there is an “unknown trend” and provide an explanation.

   o Document the IMT discussion with regards to the analysis of the number of SIs opened by clicking on the words “Enter trend analysis discussion”. If there is no identifiable trend, document the discussion that led to this conclusion.

   o Document the discussion with regards to the actions taken or needed to address the identified trend of SIs opened by clicking on the words “Enter discussion notes regarding actions taken or actions needed to address trend”.

   o Follow this example to complete the following data points

   ▪ SIs entered for then 7-days of the incident
   • CMEs should identify why the SIs were entered more than seven days after the incident and document actions to be taken or
actions that have occurred to ensure that SIs are entered on time in the future.

- SIs Closed
- SIs not closed within 30 days of entry.
  - CMEs should identify why the SIs were closed more than thirty days after entry and document actions to be taken or actions that have occurred to ensure that SIs are closed on time in the future.
- SIs with “no recommended actions”
- SIs with documented outcomes for recommended actions
7.) **Serious Incident Types.** Information for this section of the IMT meeting should be pulled directly from CAM following the Quick Reference Guide located here:

Each data point follows the same pattern as in the example below:
- Document the number of each type of SI entered during the time-period identified in #4 or #6 by clicking on the words in the prompt. For example, “# of acts of physical aggression SIs entered”
- Identify the trend by clicking on the down arrow next to the words “Trend Analysis”
  - To maintain data integrity, identify if there is an increase or decrease from the previous reporting period.
  - A CME can identify that there is an “unknown trend” and provide an explanation.
- Document the discussion with regards to if the trend may be attributed to any specific individual(s) by clicking on the words “Enter trend analysis discussion”
- Document the discussion with regards to if the trend may be attributed to any specific provider(s) by clicking on the words “Enter trend analysis discussion”
- Document the discussion with regards to if the trend may be attributed to any specific setting(s) by clicking on the words “Enter trend analysis discussion”
- Document the discussion with regards to if the trend may be attributed something else by clicking on the words “Enter trend analysis discussion”
- Document the discussion with regards to the actions taken or needed to address the identified trend of SIs opened by clicking on the words “Enter discussion notes regarding actions taken or actions needed to address trend”.
8.) **Emerging Concerns**

- The IMT meeting participants should discuss any **service equity concerns** and document this discussion and actions by clicking on the words “Enter discussion notes regarding any service equity concerns including actions taken or actions needed”.
- The IMT meeting participants should discuss any **concerns with community resources** and document this discussion and actions by clicking on the words “Enter discussion notes regarding any community resource concerns including actions taken or actions needed”.
- The IMT meeting participants should discuss any **near misses** and document this discussion and actions by clicking on the words “Enter discussion notes regarding any concerns that did not rise to the level of a serious incident but are still concerning to this case management entity – including actions taken or actions needed”.
- The IMT meeting participants should discuss **correlations between SI types** and document this discussion and actions by clicking on the words “Enter discussion notes regarding identified correlations between SI types between – including actions taken or actions needed”.
- The IMT meeting participants should discuss **cross reporting to Child Welfare** and document this discussion and actions by clicking on the words “Enter discussion notes regarding cross reporting to Child Welfare – including actions taken or actions needed”.
- The IMT meeting participants should discuss their **top concerns**. The concern should be identified in the left-hand column by clicking on the words “List the concerns identified by this CME during this reporting period”. The discussion of the concern and actions taken should be documented in the right-hand column by clicking on the words “Enter discussion notes regarding actions taken or actions needed to address trend(s)”. If there are additional concerns the CME identifies, check the box and attach a separate list. If the CME does not identify five concerns document that discussion.
- The IMT meeting participants should discuss **top individuals who have received the most SI entries** during the reporting period identified in #4 or #6. The individual’s name should be identified in the left-hand column by clicking on the words “List the individuals who have received the most SI entries during this reporting period”. The discussion of the concern and actions taken should be documented in the right-hand
column by clicking on the words “Enter discussion notes regarding actions taken or actions needed to address trend(s)”. If there are additional individuals the CME identifies, check the box and attach a separate list. If the CME does not identify five individuals of concern, document that discussion.

- The IMT meeting participants should discuss **top providers who have received the most SI entries** during the reporting period identified in #4 or #6. The providers’ name should be identified in the left-hand column by clicking on the words “List the providers associated with the most SI entries during this reporting period”. The discussion of the concern and actions taken should be documented in the right-hand column by clicking on the words “Enter discussion notes regarding actions taken or actions needed to address trend(s)”. If there are additional providers the CME identifies, check the box and attach a separate list. If the CME does not identify five providers of concern, document that discussion. It is possible that a specific provider may have received the most SIs simply because of the numbers of individuals served – this discussion should be documented.

- The IMT meeting participants should discuss **top settings who have received the most SI entries** during the reporting period identified in #4 or #6. The setting names should be identified in the left-hand column by clicking on the words “List the settings associated with the most SI entries during this reporting period”. The discussion of the concern and actions taken should be documented in the right-hand column by clicking on the words “Enter discussion notes regarding actions taken or actions needed to address trend(s)”. If there are additional settings the CME identifies, check the box and attach a separate list. If the CME does not identify five settings of concern, document that discussion. It is possible that a specific setting may have received the most SIs simply because of the numbers of individuals served – this discussion should be documented.
9.) **Case Management Entity Self-Review.** The IMT meeting participants should discuss issues, trends, actions, and outcomes that they identify within the CME during the reporting period identified in #4 or #6. Both positive trends or issues as well as concerns should be discussed and documented.

- In the left-hand column describe the issue or trend that the IMT meeting participants recognize by clicking on the words “Document self—identified issue or trend within this CME”.
- In the center column document the action taken or needed by clicking on the words “Document discussion of actions taken or needed to address issue or trend”.
- Each IMT meeting should review the previous meetings’ self-review and in the right-hand column the IMT meeting participants should summarize the outcome of the actions identified in the during the previous meeting. In the right-hand column document the follow up by clicking on the words “Document follow-up from previous meeting with outcome of actions”.
- If there are more than five identified issues or trends identified by the IMT meeting participants check the box and attach another list.
Directions for the completion of the Incident Management Team reporting form

10.) **Centralized Abuse Management (CAM) System Review.** The IMT meeting participants should discuss CAM and identify system improvement suggestions.
  
  o Identify if the system did or did not allow the CME to **access SI reporting information** by clicking on the down arrow located next to the words “Identify if the system allowed”.

  Provide feedback and specific requests for system improvement by clicking on the words “Provide feedback as to what is/is not working with the CAM system. Please also include specific requests or ideas to improve the system”.

  o Identify if the system did or did not allow the CME to **efficiently and effectively communicate about SIs** by clicking on the down arrow located next to the words “Identify if the system allowed”.

  Provide feedback and specific requests for system improvement by clicking on the words “Provide feedback as to what is/is not working with the CAM system. Please also include specific requests or ideas to improve the system”.

Brokerages have completed the IMT report. Complete step #7 and then securely email the report to **IMT.Submissions@dhsoha.state.or.us** using this link: **https://secureemail.dhsoha.state.or.us/securereader/init.jsf?brand=doc67197**
11.) Centralized **Abuse Management (CAM) System Review for abuse.** The CDDP IMT meeting participants should discuss CAM and identify system improvement suggestions.

- Identify if the system did or did not allow the CME to **access abuse reporting information** by clicking on the down arrow located next to the words “Identify if the system allowed”.
  Provide feedback and specific requests for system improvement by clicking on the words “Provide feedback as to what is/is not working with the CAM system. Please also include specific requests or ideas to improve the system”.

- Identify if the system did or did not allow the CME to **efficiently and effectively communicate about abuse reporting** by clicking on the down arrow located next to the words “Identify if the system allowed”.
  Provide feedback and specific requests for system improvement by clicking on the words “Provide feedback as to what is/is not working with the CAM system. Please also include specific requests or ideas to improve the system”.

**OBSOLETE**
12.) **Abuse Data Entry.** CDDPs will document information regarding abuse. Each data point follows the same pattern as in the example below:

- Document the number of abuse allegations entered during the reporting period identified in step #4 or #6 by clicking on the words “# of abuse investigations entered”.
- Document the number of abuse allegations assigned for investigation during the reporting period identified in step #4 or #6 by clicking on the words “# of abuse investigations assigned for an investigation”.
- Document the number of abuse investigations entered during the previous reporting period or clarify why this information is not available by clicking on the words “# of abuse investigations entered during the previous reporting period”.
- Identify the trend by clicking on the down arrow next to the words “Trend Analysis”

- To maintain data integrity, identify if there is an increase or decrease from the previous reporting period.
- A CDDP can identify that there is an “unknown trend” and provide an explanation.

- Document the discussion with regards to if the trend may be attributed to any specific individual(s) by clicking on the words “Enter trend analysis discussion”
- Document the discussion with regards to if the trend may be attributed to any specific provider(s) by clicking on the words “Enter trend analysis discussion”
- Document the discussion with regards to if the trend may be attributed to any specific setting(s) by clicking on the words “Enter trend analysis discussion”
- Document the discussion with regards to if the trend may be attributed something else by clicking on the words “Enter trend analysis discussion”
Directions for the completion of the Incident Management Team reporting form

- Document the discussion with regards to the actions taken or needed to address the identified trend of SIs opened by clicking on the words “Enter discussion notes regarding actions taken or actions needed to address trend”.

- Follow the example above to complete the following data points:
  - Related Serious Incidents
  - Timeliness of first contact
  - Screening Time Cycle
    - For this data point identify the average number of days between reporting and screening of an abuse allegation. Also identify the longest number of days and provide an explanation or rationale. Also identify the shortest number of days and provide an explanation or rationale.
  - Investigation Time Cycle
    - For this data point identify the average number of days between the opening and closing of an abuse allegation. Also identify the longest number of days and provide an explanation or rationale. Also identify the shortest number of days and provide an explanation or rationale.
  - Caseload Ratio
    - For this data point identify the number of investigations opened per Abuse Investigator. Also identify the largest number of investigations opened by an Abuse Investigator and provide an explanation or rationale.
    - Identify if the CDDP has employees how have shared responsibility as an investigator as well as another role and enter discussion notes.
  - Re-Abuse Rates
    - Document cases of re-abuse involving the same victim and alleged perpetrator
  - Death Review
  - Core Competency Training
  - Annual Training Requirements

CDDPs have completed the IMT report. Complete step #7 and then securely email the report to IMT.Submissions@dhsoha.state.or.us using this link https://secureemail.dhsoha.state.or.us/securereader/init.jsf?brand=doc67197
The purpose of this guide is to identify where in the CAM system CMEs can locate previously created (canned) reports for the purposes of tracking and trending incident trends.

*Please refer to the Reports QRG to learn how to edit reports in CAM

**Locating the “Serious Incident by County” Report**

This report allows CDDP Supervisors and Brokerage Directors to see all SIs within their county and across the state.

**Step 1:** Once you are logged into CAM, you will be taken to the home page by default.

**Step 2:** Below the global search bar, located next to the CAM logo on the top left of the screen, you will find your tab options to navigate to new objects in CAM. The second to last tab is titled “Reports”.

By clicking the Reports tab once, you will be taken to the “Reports & Dashboards” object. Your screen will look like the following picture, with the recently viewed reports in the center of the page, and folders containing canned reports to the left of the screen.
Step 3: Within the “All Folders” section of the page at your screen’s left, you can find the Serious Incident with County report by either:

- Opening the first folder beneath the “All Folders” header. By clicking once on the “Unfiled Public Reports” folder, you’ll be able to select the reports contained within that folder in the center of your screen. These reports are in alphabetical order, and you may need to scroll down and select “Next” at the bottom of your screen until you find the report titled “Serious Incident with County”.
- By simply typing in the name of the report in the “Find a folder…” search bar to the left of your screen, you’ll be given matching options in the center of your page.

When you locate the Serious Incident with County report in the center of your screen, click once to open the report.

Step 4: When the report is opened, the top of your page will look like this:

The criteria of the report are displayed as bold text beneath your tabs. These criteria reflect the: SI, SI status, 10 Serious Incident type, etc.

* Refer to the Reports QRG that has been provided with this document to learn how to edit, add or remove criteria from this report
Step 5: To select the time span you are wanting to analyze, you can select the date range “From” date to the “To” date in the fields below:

This option is located at the center of the screen above your tabs. The “Date Field” and “Range” have been prepopulated to allow you to select whatever dates you want to see the SIs that were created within the time frame.

Step 6: When your dates have been selected, you must click the “Run Report” tab once to refresh the report and display the SIs within the selected time frame.

Step 7: You can also select “Export Details”, which will export your report into an excel workbook. By selecting the Export tab, you’ll be taken to a new page that has the exported format prepopulated.
Simply select “Export” beside the “Done” button at the bottom of the format details to open the report in an editable, excel, workbook. The following window will appear on your screen:

Click the “OK” button to launch the export.

Depending on your computer settings, you may have the additional validation to open the report:

This is a standard validation that poses no risk to security or computer. Click “Yes”. Depending on the volume of data contained within the report, it may take several seconds to a minute to load. When the report has finished loading, you’ll have pre-populated filters at the top of your workbook, that will allow for further customization of your report.
* The following step is intended for CDDPs that have access to Abuse Intakes/Investigations within CAM

The previous steps can be followed to generate and export abuse data within CAM. Instead of searching the “Unfiled Public Reports”, you will need to find the folder titled “DD Abuse Data Reports” in the left hand Folders section of your Reports tab.

In this folder are various reports in relation to Intakes and Investigations within CAM. You can find the report with criteria that best suit your data needs and may also edit these reports by following the accompanied Reports QRG.

For questions regarding these steps, please contact: Joshua Stogsdill
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