

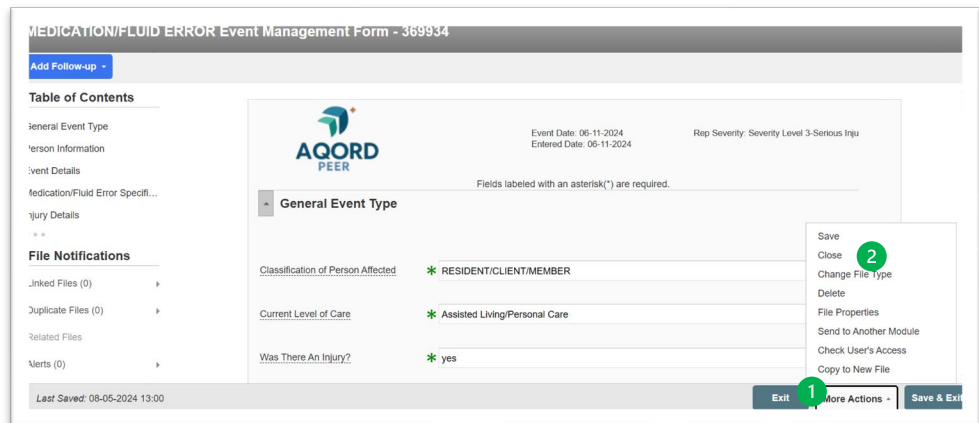
How to Close a File

There are 3 ways to close a file: From within the file itself, from the info center, and from the search page.

Method 1: From within the event file

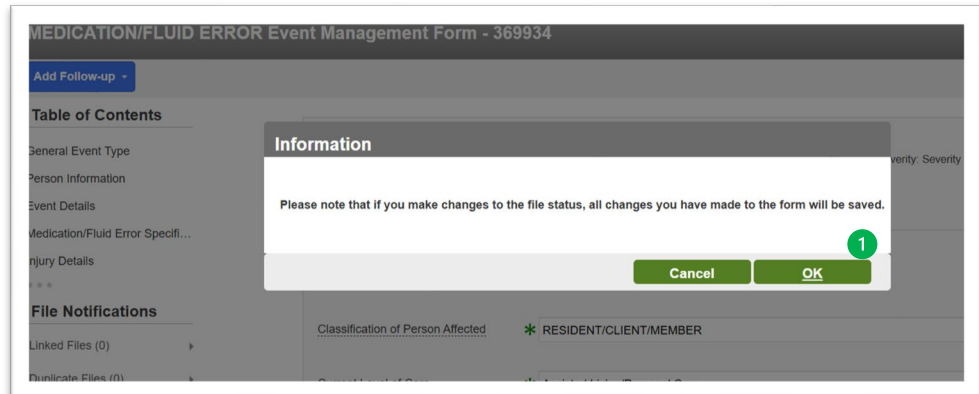
From the more actions tab in the lower right, select “Close”

3



The screenshot shows the 'MEDICATION/FLUID ERROR Event Management Form - 369934'. On the left is a 'Table of Contents' with links to 'General Event Type', 'Person Information', 'Event Details', 'Medication/Fluid Error Specifics', and 'Injury Details'. The main area is titled 'General Event Type' and contains fields for 'Classification of Person Affected' (RESIDENT/CLIENT/MEMBER), 'Current Level of Care' (Assisted Living/Personal Care), and 'Was There An Injury?' (yes). A 'More Actions' menu is open in the bottom right corner, with 'Close' highlighted. Other options include 'Save', 'Change File Type', 'Delete', 'File Properties', 'Send to Another Module', 'Check User's Access', and 'Copy to New File'. At the bottom of the form, there are buttons for 'Exit', 'More Actions', and 'Save & Exit'.

In the resulting dialog box, click “ok”



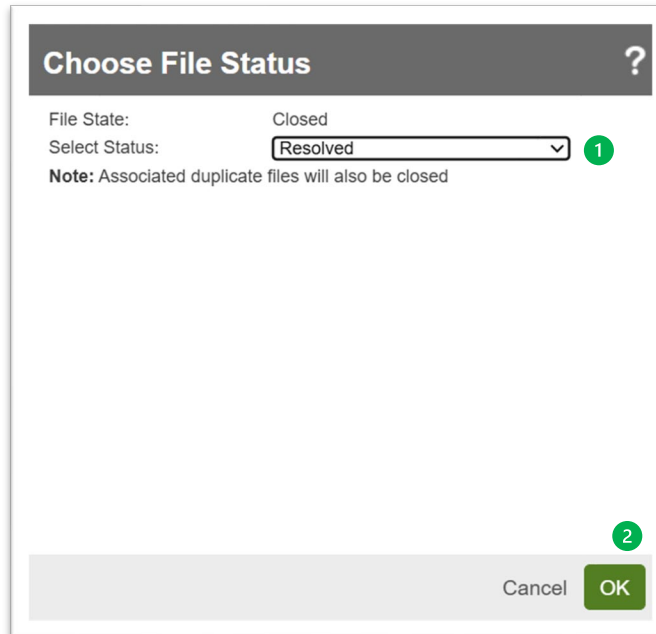
The screenshot shows the same form as above, but with an 'Information' dialog box open in the center. The dialog box contains the text: 'Please note that if you make changes to the file status, all changes you have made to the form will be saved.' At the bottom of the dialog box are 'Cancel' and 'OK' buttons. The 'OK' button is highlighted with a green circle and the number 1.

The Choose File Status dialog box will appear.

Leave as resolved in the status or select another option if applicable.

Click “Ok”

The event file is now closed.



Choose File Status ?

File State: Closed

Select Status: **Resolved** 1

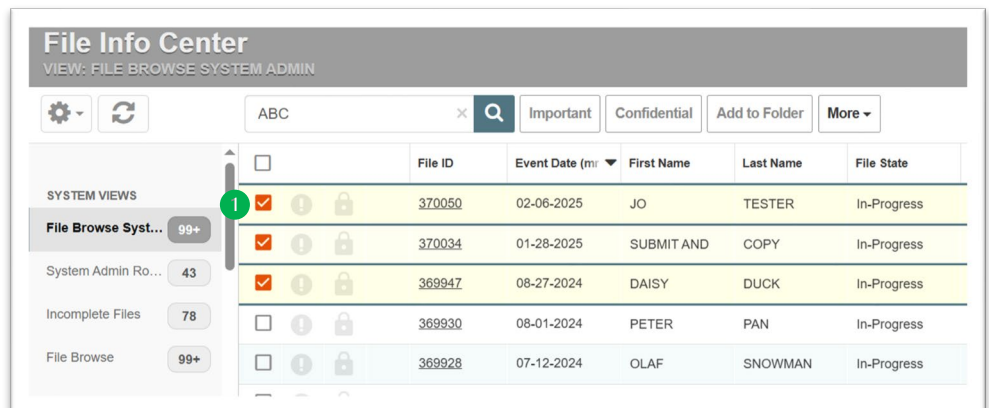
Note: Associated duplicate files will also be closed

Cancel OK 2

Method 2: From within the File Info Center

Select the file, or files you would like to close by checking the boxes to the right of the file id

This will prompt the top menu to appear



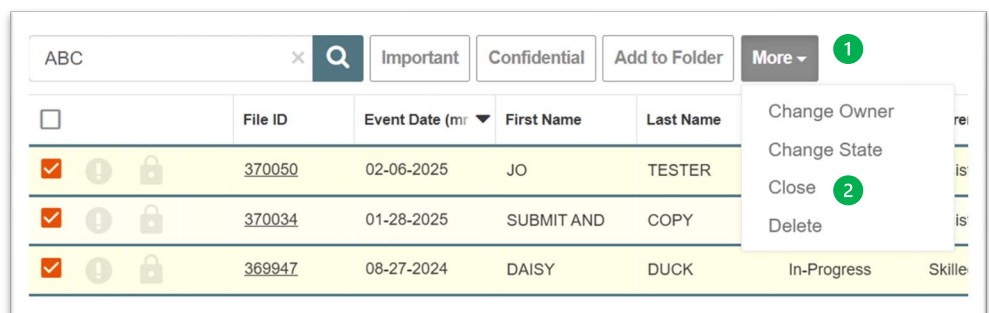
File Info Center
VIEW: FILE BROWSE SYSTEM ADMIN

ABC [Search] Important Confidential Add to Folder More 1

	File ID	Event Date (m)	First Name	Last Name	File State
<input checked="" type="checkbox"/>	370050	02-06-2025	JO	TESTER	In-Progress
<input checked="" type="checkbox"/>	370034	01-28-2025	SUBMIT AND	COPY	In-Progress
<input checked="" type="checkbox"/>	369947	08-27-2024	DAISY	DUCK	In-Progress
<input type="checkbox"/>	369930	08-01-2024	PETER	PAN	In-Progress
<input type="checkbox"/>	369928	07-12-2024	OLAF	SNOWMAN	In-Progress

SYSTEM VIEWS: File Browse Syst... 99+ System Admin Ro... 43 Incomplete Files 78 File Browse 99+

From the More dropdown, select “Close.”



ABC [Search] Important Confidential Add to Folder More 1

	File ID	Event Date (m)	First Name	Last Name	File State
<input checked="" type="checkbox"/>	370050	02-06-2025	JO	TESTER	In-Progress
<input checked="" type="checkbox"/>	370034	01-28-2025	SUBMIT AND	COPY	In-Progress
<input checked="" type="checkbox"/>	369947	08-27-2024	DAISY	DUCK	In-Progress

More dropdown menu: 2

- Change Owner
- Change State
- Close
- Delete

Leave status as “resolved” or select another option if applicable.

Click “OK”

The file is now closed

Close File(s)

Status

Resolved

1

Note: Associated duplicate files will also be closed.

Cancel

OK

2

Method 3: From the Search Page

Search to display files.

Search Page

Search for

within

Files

in module

Risk

Search

More options

1

	File Name	File ID	Classification of Person Affected	General Event Type	Last Name	First Name
<input type="checkbox"/>	MEDICATION/FLUID ERROR Event (369934)	369934	RESIDENT/CLIENT/MEMBER	MEDICATION/FLUID ERROR	DAISY	DUCK
<input type="checkbox"/>	FALL Event (369947)	369947	RESIDENT/CLIENT/MEMBER	FALL	DUCK	DAISY
<input type="checkbox"/>	ENVIRONMENT Event (370277)	370277	LOCATION/PERSON NOT APPLICABLE	ENVIRONMENT		

Select the file or files you would like to close, by checking off the box to the left of the file name.

This will result in the “open, delete, and more” boxes appearing.

Note: if you select more than one file, the box for “Open” will not appear.

Search Page

Search for

within

Files

in module

Risk

Open

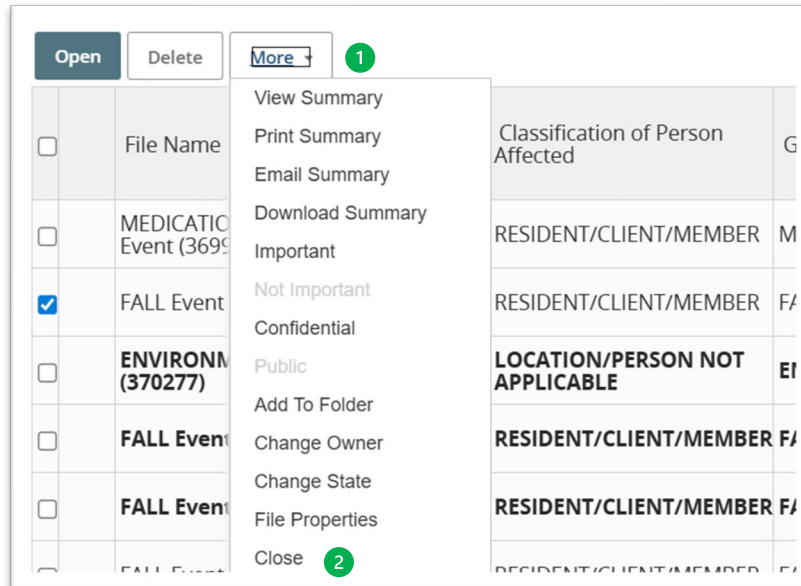
Delete

More

2

	File Name	File ID	Classification of Person Affected
<input type="checkbox"/>	MEDICATION/FLUID ERROR Event (369934)	369934	RESIDENT/CLIENT/MEME
1 <input checked="" type="checkbox"/>	FALL Event (369947)	369947	RESIDENT/CLIENT/MEME

From the More dropdown, select “Close”

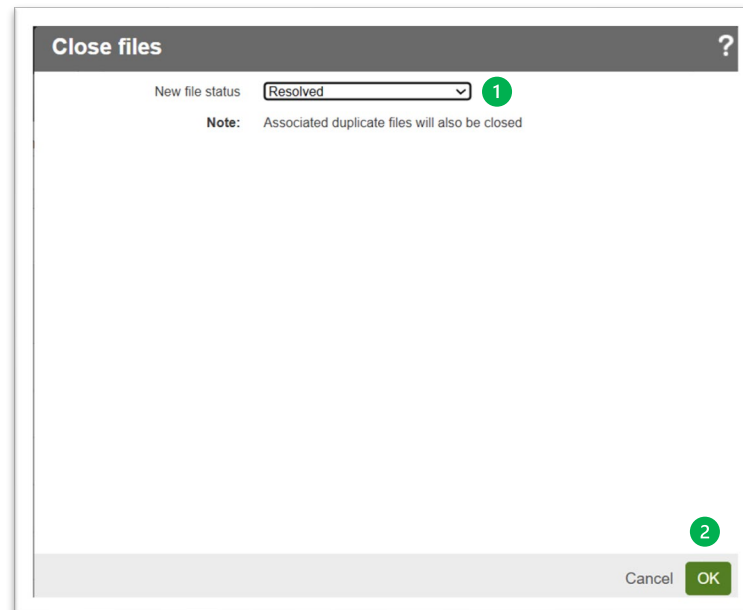


The screenshot shows a table with columns for checkboxes, file names, and classifications. A dropdown menu is open over the table, showing options like 'View Summary', 'Print Summary', 'Email Summary', 'Download Summary', 'Important', 'Not Important', 'Confidential', 'Public', 'Add To Folder', 'Change Owner', 'Change State', 'File Properties', and 'Close'. The 'Close' option is highlighted with a green circle labeled '2'. The 'More' button in the table header is also highlighted with a green circle labeled '1'.

Leave status as “resolved” or select another option if applicable.

Click “OK”

The file is now closed



The screenshot shows a dialog box titled 'Close files' with a question mark icon. It contains a dropdown menu for 'New file status' with 'Resolved' selected, highlighted by a green circle labeled '1'. Below the dropdown is a note: 'Note: Associated duplicate files will also be closed'. At the bottom right, there are 'Cancel' and 'OK' buttons, with the 'OK' button highlighted by a green circle labeled '2'.