

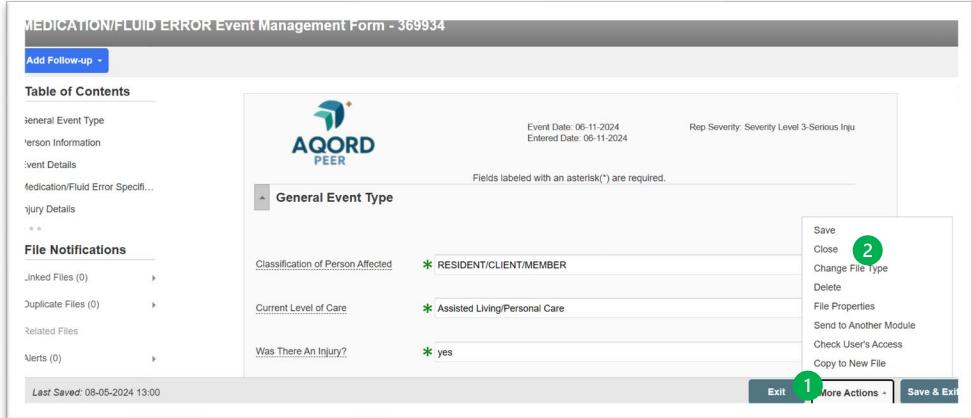
How to Close a File

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



MEDICATION/FLUID ERROR Event Management Form - 369934

Table of Contents

- General Event Type
- Person Information
- Event Details
- Medication/Fluid Error Specif...
- Injury Details
- File Notifications
- Linked Files (0)
- Duplicate Files (0)
- Related Files
- verts (0)

Classification of Person Affected: * RESIDENT/CLIENT/MEMBER

Current Level of Care: * Assisted Living/Personal Care

Was There An Injury?: * yes

Event Date: 06-11-2024 Entered Date: 06-11-2024 Rep Severity: Severity Level 3-Serious Inju

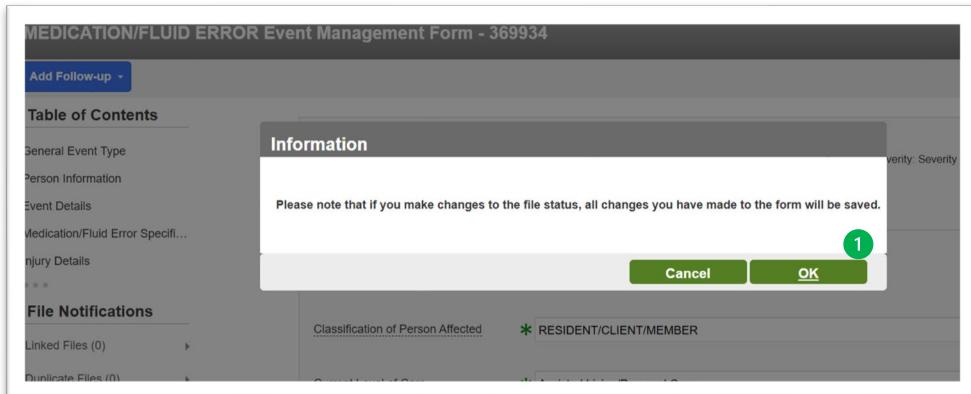
Fields labeled with an asterisk(*) are required.

Save Close **2** Change File Type Delete File Properties Send to Another Module Check User's Access Copy to New File Exit **1** More Actions Save & Exit

Last Saved: 08-05-2024 13:00

In the resulting dialog box, click “ok”

1



MEDICATION/FLUID ERROR Event Management Form - 369934

Information

Please note that if you make changes to the file status, all changes you have made to the form will be saved.

Classification of Person Affected: * RESIDENT/CLIENT/MEMBER

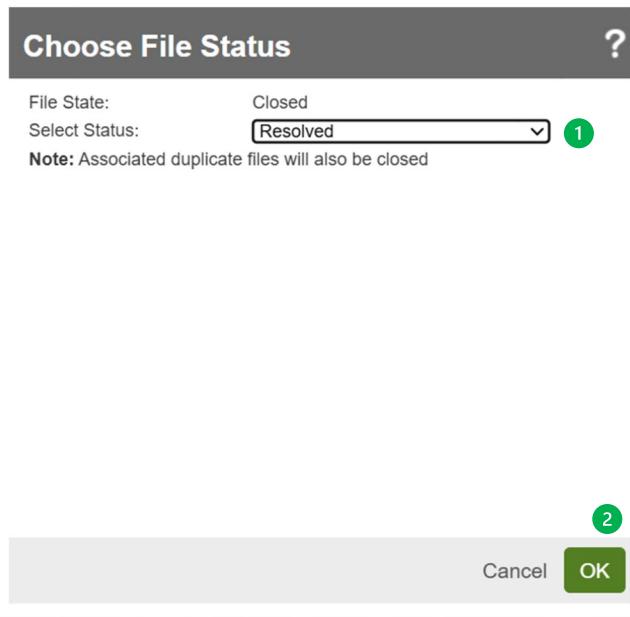
Cancel **OK**

The Choose File Status dialog box will appear.

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

Click “Ok”

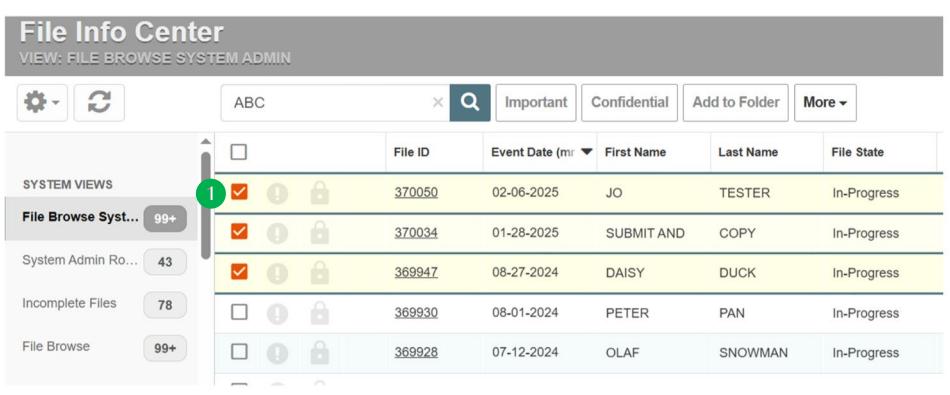
The event file is now closed.



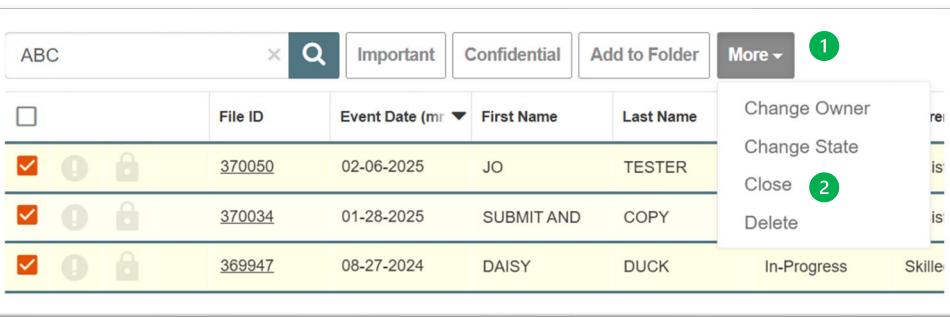
Method 2: From within the File Info Center

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



From the More dropdown, select “Close.”



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 in module
 Files More options

1

<input type="checkbox"/>	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.

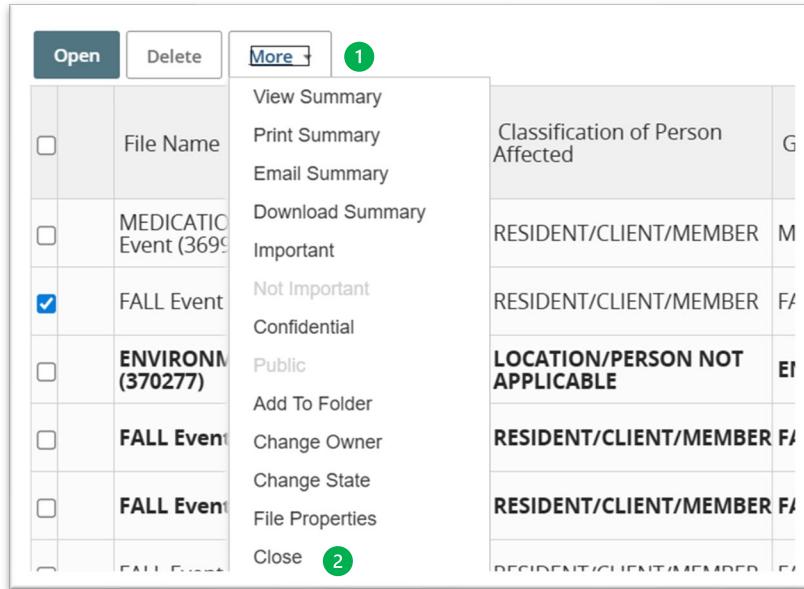
Search Page

Search for within in module
 Files

2

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

From the More dropdown, select “Close”



The screenshot shows a software interface with a 'More' dropdown menu open. The menu items are:

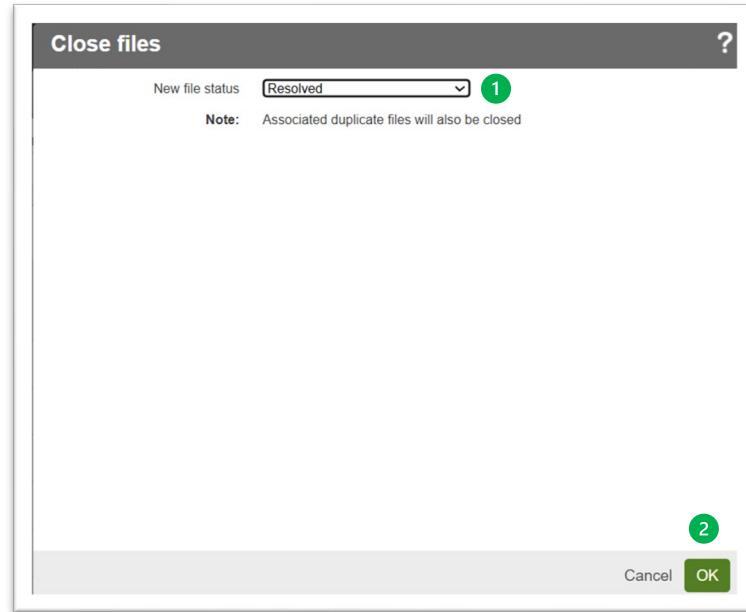
- Open
- Delete
- More** (highlighted with a green circle labeled '1')
- View Summary
- Print Summary
- Email Summary
- Download Summary
- Important
- Not Important
- Confidential
- Public
- Add To Folder
- Change Owner
- Change State
- File Properties
- Close** (highlighted with a green circle labeled '2')

On the right side of the interface, there is a table with columns for 'Classification of Person Affected' and 'Status' (G, M, FA, EI, F/A, F).

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

Click “OK”

The file is now closed



The screenshot shows a 'Close files' dialog box. It contains the following fields:

- New file status: **Resolved** (highlighted with a green circle labeled '1')
- Note: Associated duplicate files will also be closed

At the bottom of the dialog box are 'Cancel' and 'OK' buttons, with the 'OK' button highlighted with a green circle labeled '2'.