ALR Dynamics – Online Incident Reporting System

ALR User Guide

Introduction

This guide provides assistance for Assisted Living Residence (ALR) users of *ALR Dynamics* – the system of record for the online reporting of required incidents to the Executive Office of Elder Affairs (EOEA). *ALR Dynamics* is a replacement for the former reporting system built with Quick Base software.

The ALR reporting requirements have not changed with the implementation of the new *ALR Dynamics* system. The new system simply presents the information with a slightly different look and feel, with the intention of better guiding an ALR reporter through communication of all necessary information related to a specific incident.

Please consult ALR regulations [651 CMR 12] for details on now to identify a Reportable Incident.

Contents

Getting Started

Your ALR Dynamics Account

Users of *ALR Dynamics* will receive their credentials via email. The email will contain your system username, a temporary password, and a link to access *ALR Dynamics*.

First Login

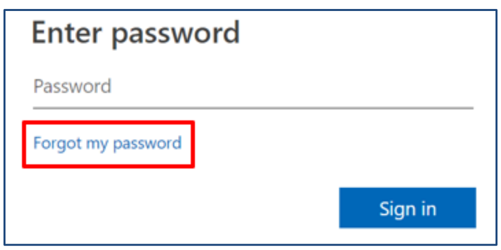
Login to ALR Dynamics with the credentials provided. You will be prompted to update your password to one of your choosing, that meets the stated security requirements.

You will also be required to agree electronically to the data security agreement that appears upon first login before accessing the *ALR Dynamics* system.

For a detailed description of the first login process, and suggested troubleshooting steps, please see Appendix A – First Login & Troubleshooting Login Issues

Forgot Your Password?

You can reset your password by clicking on the *Forgot my password* link on the login page.

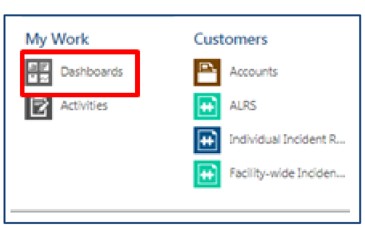


Follow the instructions displayed and a temporary password will be sent to your primary email address.

Viewing Your Data

When you login to ALR Dynamics you will be brought directly to your primary dashboard, which is one of several ways that you can view your ALR reporting information. As you become more comfortable with the system, you may prefer other views for working with your reports.

- If you ever "lose" track of your location in the application, you can return to your dashboard by clicking on *Dashboards* under *My Work*.



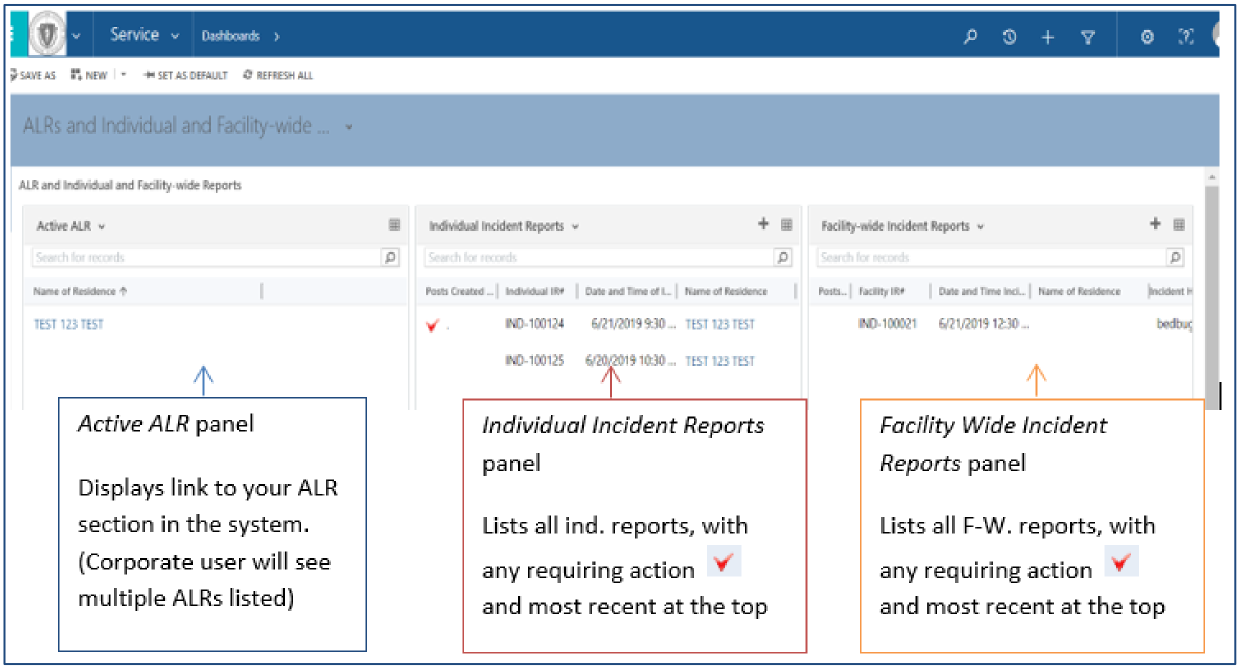
Viewing Dashboard and Submitting an Incident Report

The following walk-through shows an example of how an ALR Reporter would submit a *Fall* report using the new *ALR Dynamics* system.

- The basic process is the same for all Incident Reports, although questions vary based on the report type and incident type selected.

View Your Dashboard

Your primary (or "home") dashboard consists of 3 panels:

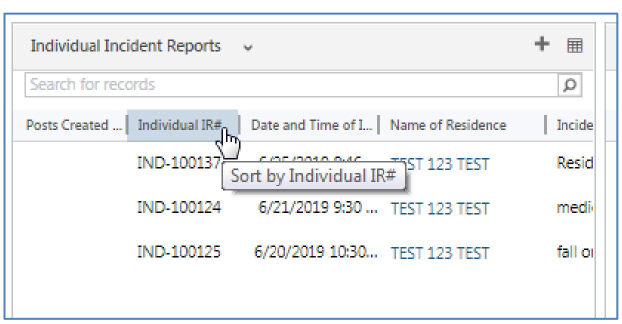


Sorting and Searching from your Dashboard

In ALR Dynamics, you have tools available to find reports that you are looking for.

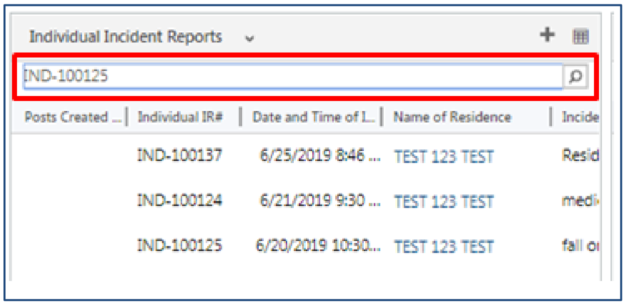
Sorting

By default, IR dashboard panels are sorted first by 'new post' (indicated with red check mark) and then by incident date (newest to oldest.) Click any column heading to sort by that specific field.



Searching

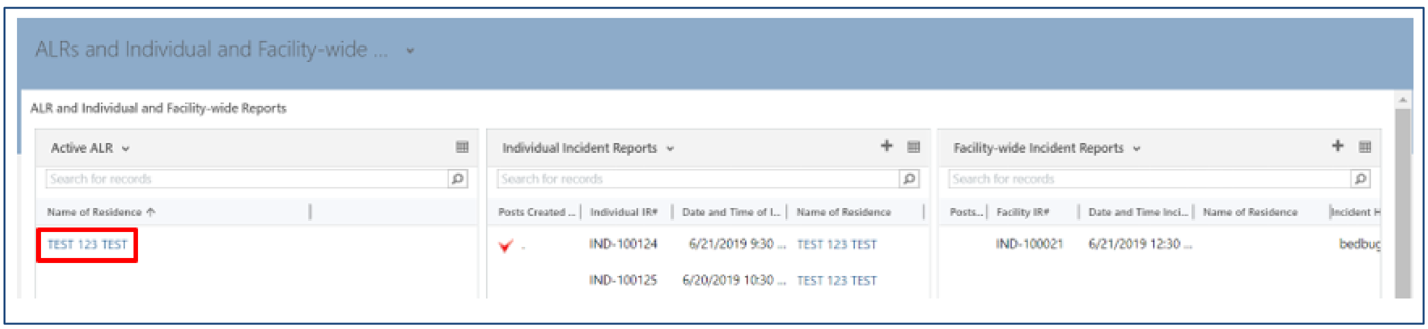
Each dashboard panel has a search field within it. Enter a report number, name, etc. to find the desired report.



Steps to Submit New Individual Incident Report

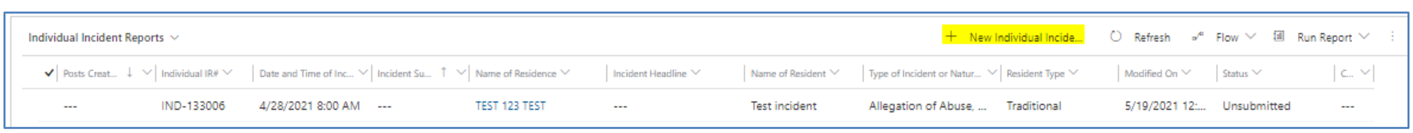
- Before creating a new incident report, gather all required information and have it on hand. You will not be able to save the report until all required fields are entered.

1. Click on your ALR facility from the *Active ALR* panel. If you are a corporate user with access to multiple ALRs, click on the facility for which you are submitting an incident report.

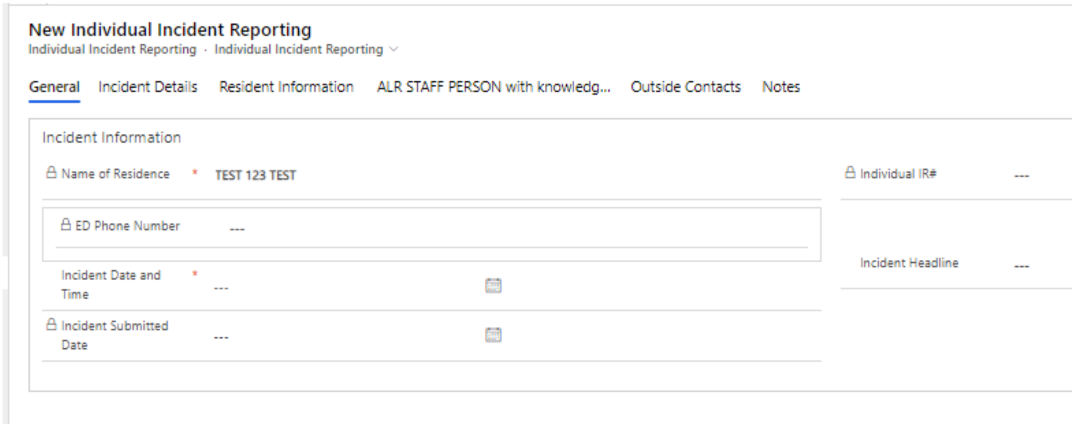


- This brings you to your ALR page, which displays another view of your existing Individual and Facility Wide reports.

2. **Click on the + symbol to the upper right of the *Individual Incident Reports* listing.**



- This will display a blank, unsubmitted report.

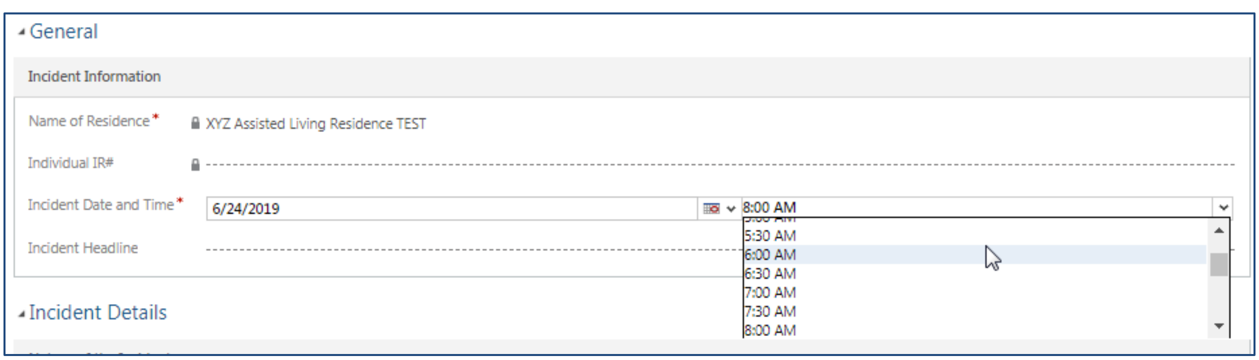


- These are the sections of the Individual Incident Report form, in the order displayed. Click on each tab to advance to that section:
  - General Incident Information
  - Incident Details
  - Resident Information
  - Person with knowledge of this incident
  - Outside Contacts
  - Notes

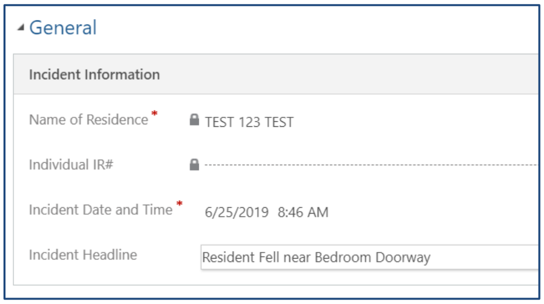
- Any question with a red asterisk * is a *required field* – you will not be able to submit the report successfully if a response to a required question is left blank.
- Any field with a lock symbol cannot be edited by the ALR user. These fields are populated automatically by the system, if required.

3. **In the *General* section, add the *Incident Date and Time.* Select the date from the calendar picker, or enter it in with your keyboard.**

- You will receive a pop up prompt to remind you to select the correct time of the incident. The system defaults to 8 AM - ***take special care to make sure you have entered the precise time of the incident.***



4. **Enter a brief yet descriptive *Incident Headline* for the report**

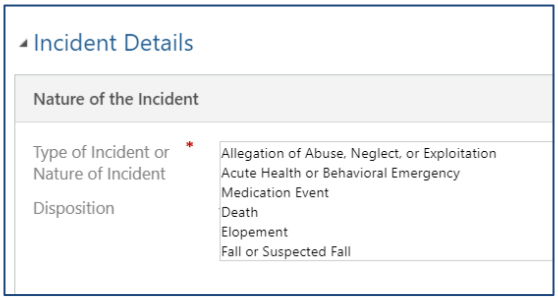


General

Incident Information

Name of Residence *	TEST 123 TEST
Individual IR#	
Incident Date and Time *	6/25/2019 8:46 AM
Incident Headline	Resident Fell near Bedroom Doorway

5. In the Incident Details section, select the *Type of Incident or Nature of Incident* from the drop down listing.



Incident Details

Nature of the Incident

Type of Incident or Nature of Incident *

Disposition

Allegation of Abuse, Neglect, or Exploitation
Acute Health or Behavioral Emergency
Medication Event
Death
Elopement
Fall or Suspected Fall

- Depending on the *Type of Incident* you select, different additional questions will be displayed.

6. Complete each required question. Add non-required information if appropriate. As noted, in the narrative section please avoid using identifying information in your description of the incident.

Incident Details

Nature of the Incident

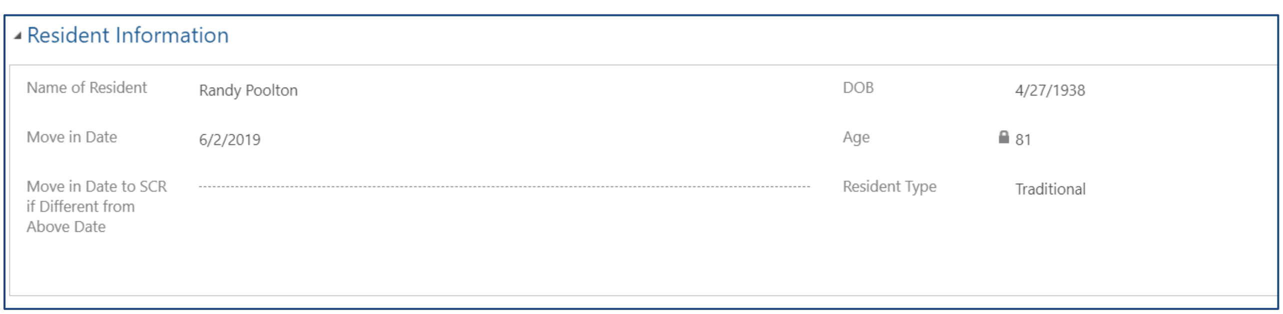
Type of Incident or Nature of Incident	Fall or Suspected Fall
Specific Type *	Unwitnessed
Detail Type *	Accident
Resident Status *	Resident sent to ER for evaluation
Resident Status Outcome *	No Update: remains at Hospital
Disposition	

Incident Narrative (including Action taken – please avoid use of identifying information in Narrative –for example refer to resident as Resident A, etc)

Resident was amb to bathroom when she lost her balance and fell c/o pain 911 called and she was transferred to Wilson Hospital ER where she was admitted for UTI . Intervention 24 private care , re education regarding drinking more fluids.

7. Complete the Resident Information section with any information you have available.

- The consumer name is permissible in *ALR Dynamics* because of the increased security of the system.

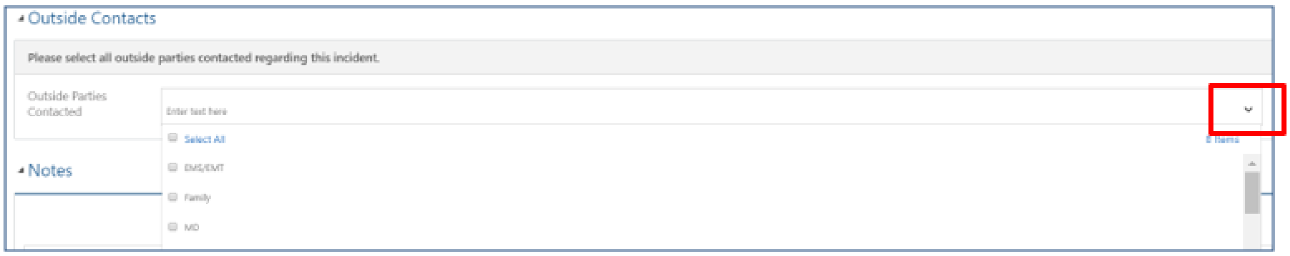


Resident Information

Name of Resident	Randy Poolton	DOB	4/27/1938
Move in Date	6/2/2019	Age	81
Move in Date to SCR if Different from Above Date		Resident Type	Traditional

8. **Complete the remaining sections: Person with knowledge of this incident, and Outside Contacts.**

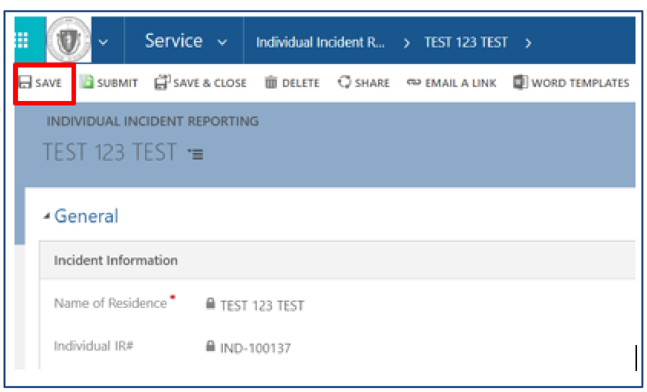
   - You can select multiple responses in the Outside Parties Contacted dropdown. The dropdown arrow is located on the far-right side of the response area



   - The *Notes* tab is where you will find any future communication from the EOEA Certification Unit, and where you will attach documents if necessary. Details on that process will be reviewed in a later section.

9. **Once completed, click the <u>Save</u> button. Save, and additional commands, are located at the top of the incident report screen.**

   - *If you have not entered all the required fields, you will be prompted to complete those field(s) before saving.*

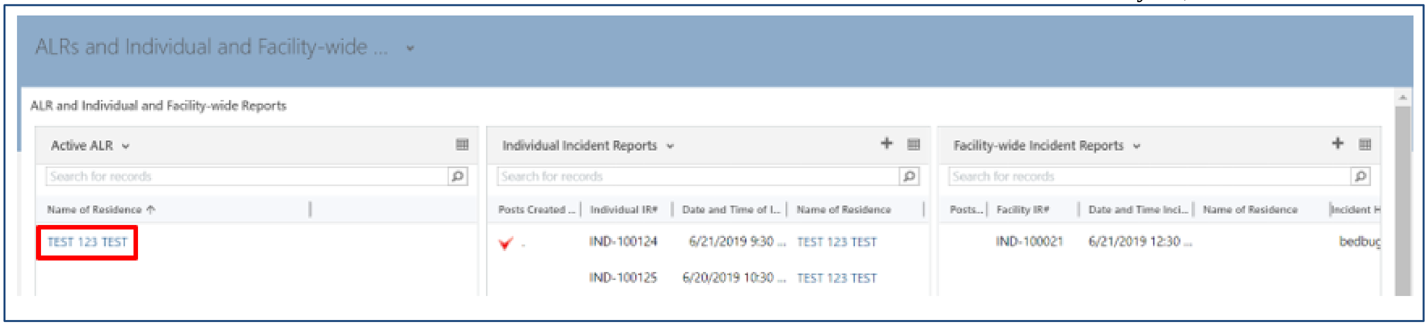


10. **Once completed and saved, click the <u>Submit</u> button to officially submit the report to the EOEA Certification Unit.**

    - After the report is in Submitted status, you will no longer be able to change any information – except for within the Notes section

Submitting a Facility-Wide Incident Report

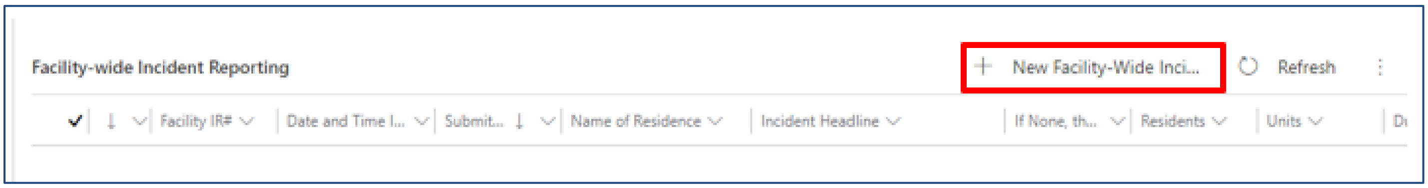
1. **Click on your ALR facility from the *Active ALR* panel. If you are a corporate user with access to multiple ALRs, click on the facility for which you are submitting an incident report.**



- This brings you to your ALR page, which displays another view of your existing Individual and Facility Wide reports.

2. Scroll down the page until you see the Facility-wide Incident Reporting Section.

3. Click the *+ New Facility-Wide Incident Reporting* button.

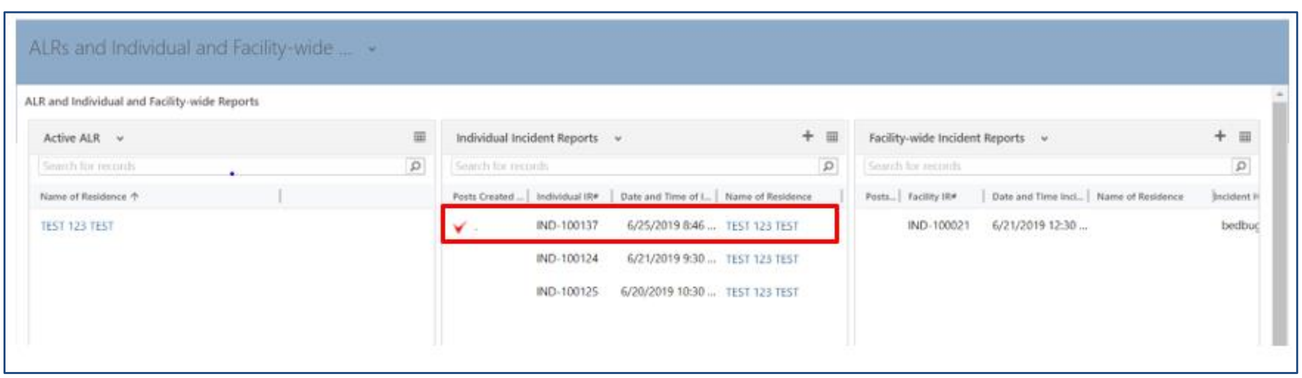


4. **Complete each section of the Incident Report as required, save, and submit following the same process as you would for an Individual Incident report**.

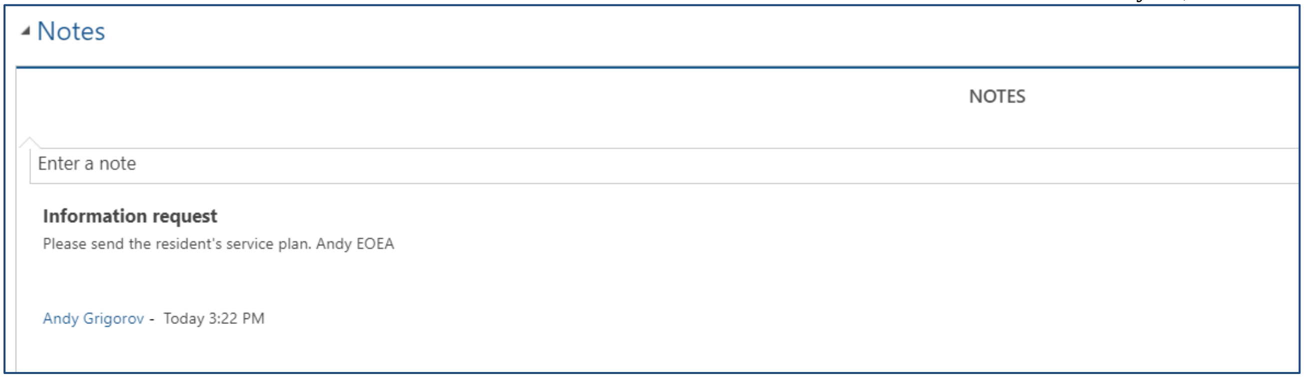
Communications (Notes) and Attachments

- <u>**Log in frequently to check if there has been a status change on a submitted report, or if EOEA has entered a note or requested documentation from you. You should also receive email notifications when EOEA has requested information from you regarding a submitted report.**</u>

5. Login and view your primary dashboard – a red check mark indicates that you have an unread note from EOEA. Double click to open.



6. Scroll down to the *Notes* section to view the new information.



7. **Attach the requested documentation**

   - **All attachments to incident reports in ALR Dynamics should be in PDF format.**

8. **Add a note confirming the requested document has been attached. This should be the last step before saving and closing a report.**

9. **Save and close the Incident Report.**

   - **During your frequent & routine logins, keep tabs on any more red check marks appearing related to the case. The EOEA Certification Unit may have more comments, or may request additional information.**

   - The EOEA Certification Unit will change the status of the report to *closed*, if and when they have completed reviewing and processing the report. You can view the status of the report any time on your dashboard**.**

ALR Dynamics Support

User Account Requests

Note: The user request process was changed as of 8/31/2021.

User requests include any request to add a new user, or edit an existing user. Edits can be user deactivations, name changes, email corrections, etc.

When you make a user request after 8/31/21, you will receive an email from ALR Support with a new version of the User Request Form (URF) with all your current and past users listed.

The new URF looks like this:

	A	B	C	D	E	F	G	H	
1	**ALR Full Name** (as displayed in ALR-Dynamics)	**Active?**	**New or Edit**	**User's Full Name** (Please double check spelling)	**ALR-Dynamics Username** (To be completed by EOEA)	**User's E-mail Address** (Please double check that email address is active and spelled correctly)	**User Role**	Date forwarded to Umass (To be completed by EOEA)	Notes
2	Example ALR of Massachusetts	Yes		Susan Jones	Susan.Jones@umassmedcwm05.onmicrosoft.com	susan.jones@exampleALR.com	Lead User		
3	Example ALR of Massachusetts	Yes	edit	Lucy Willis	Lucy.Willis@umassmedcwm05.onmicrosoft.com	lucy.jones-willis@exampleALR.com	ALR User		
4	Example ALR of Massachusetts	No		Joan Jenkins	8567edfd315e49d2b9c7305719018ea9Joan.Jenkins@umassmedcwm05.onmicrosoft.com	joan.jenkins@exampleALR.com	ALR User		

- ✓ This same URF, with the latest updates, should be used for all future requests. ***So save the updated URF in a safe, accessible place.***
- ✓ Note that ALRs should not enter anything in the 2 columns labeled with "(To be completed by EOEA)"

1. To request a new user:

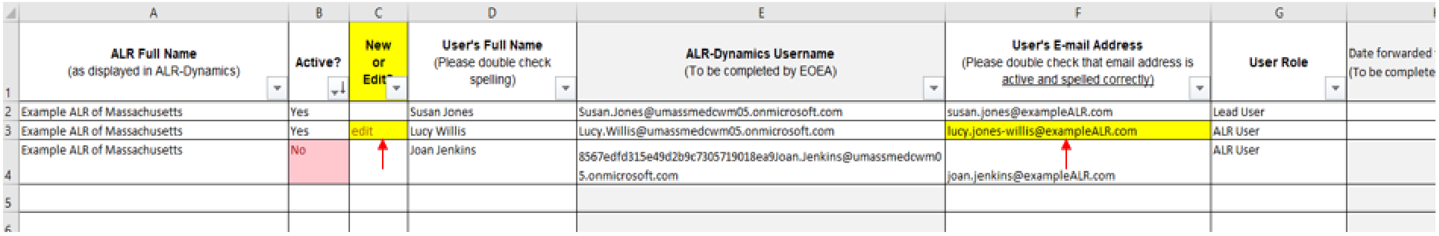
- ✓ Clearly state in an email to ALR Support the purpose of your request and attach the completed User Request Form. Describe the change you would like to make, for example: "Please add new ALR user account for Sam Fraterelli, as indicated in the attached form."
- ✓ Put information in new row, under the last complete row
- ✓ Make sure that ALR name, user's full name, and user's email address are complete and accurate
- ✓ Select "New" from the "NEW or EDIT" column
- ✓ Type in the appropriate user role, "ALR User" or "Lead User" in column G

	A	B	C	D	E	F	G	
1	**ALR Full Name** (as displayed in ALR-Dynamics)	**Active?**	**New or Edit**	**User's Full Name** (Please double check spelling)	**ALR-Dynamics Username** (To be completed by EOEA)	**User's E-mail Address** (Please double check that email address is active and spelled correctly)	**User Role**	Date forwarde (To be comple
2	Example ALR of Massachusetts	Yes		Susan Jones	Susan.Jones@umassmedcwm05.onmicrosoft.com	susan.jones@exampleALR.com	Lead User	
3	Example ALR of Massachusetts	Yes		Lucy Willis	Lucy.Willis@umassmedcwm05.onmicrosoft.com	lucy.willis@exampleALR.com	ALR User	
4	Example ALR of Massachusetts	No		Joan Jenkins	8567edld315e49d2b9c7305719018ea9Joan.Jenkins@umassmedcwm05.onmicrosoft.com	joan.jenkins@exampleALR.com	ALR User	
5	Example ALR of Massachusetts		New	Sam Fraterelli		sam.fraterelli@exampleALR.com	ALR User	
6								
7								

- ✓ Send completed form as an attachment to ALR Support.
- ✓ After the request is processed, you will receive back an updated form. ***Keep this updated form for your next request.***

2. To request a user edit (deactivation, email change, etc.)

- ✓ Clearly state in your email to ALR Support the purpose of your request and attach the completed User Request Form. Describe the change you would like to make, for example: "Edit user account email for Lucy Willis. Change email address as indicated on form"
- ✓ Make sure that ALR name, user's full name, and user's email address are complete and accurate
- ✓ Put information on the existing row for the appropriate user.
- ✓ Select "Edit" from the "NEW or EDIT" column
- ✓ Highlight the box with the requested change, as shown below.



	A	B	C	D	E	F	G	
1	ALR Full Name (as displayed in ALR-Dynamics)	Active?	New or Edit	User's Full Name (Please double check spelling)	ALR-Dynamics Username (To be completed by EOEA)	User's E-mail Address (Please double check that email address is active and spelled correctly)	User Role	Date forwarded (To be complete
2	Example ALR of Massachusetts	Yes		Susan Jones	Susan.Jones@umassmedcwm05.onmicrosoft.com	susan.jones@exampleALR.com	Lead User	
3	Example ALR of Massachusetts	Yes	edit	Lucy Willis	Lucy.Willis@umassmedcwm05.onmicrosoft.com	lucy.jones-willis@exampleALR.com	ALR User	
4	Example ALR of Massachusetts	No		Joan Jenkins	8567edfd315e49d2b9c7305719018ea9Joan.Jenkins@umassmedcwm05.onmicrosoft.com	joan.jenkins@exampleALR.com	ALR User	
5								
6								

3. **ALR Expectations:**

✓ ALRs should always have a current and updated list of their ALR-Dynamics system users. If you have misplaced your list, please request it from ALR Support.

✓ ALRs should save the most recent version of the URF in a place where those staff who make user requests can easily access it.

✓ ALRs should carefully review the list, and deactivate users who no longer need access as soon as possible.

Updated documentation available here: ALR Support Blog: https://alrir.800ageinfo.com/

Technical Recommendations & Support

- The Internet Explorer browser is not recommended for use with ALR Dynamics.

- Submit any bugs, glitches, and errors in as much complete detail as possible (including screenshots) to ALRIncidentReport@massmail.state.ma.us

IMPORTANT! Include this information in your email to support:

- Your name
- Your ALR name
- Detailed description of issue, including:
- the internet browser you are using
- what occurred
- what action was taken before issue occurred
- screenshot of any error message received
- Current status (are you able to continue work? what if anything is issue preventing you from doing?)
- Don’t include and resident PI

Document History

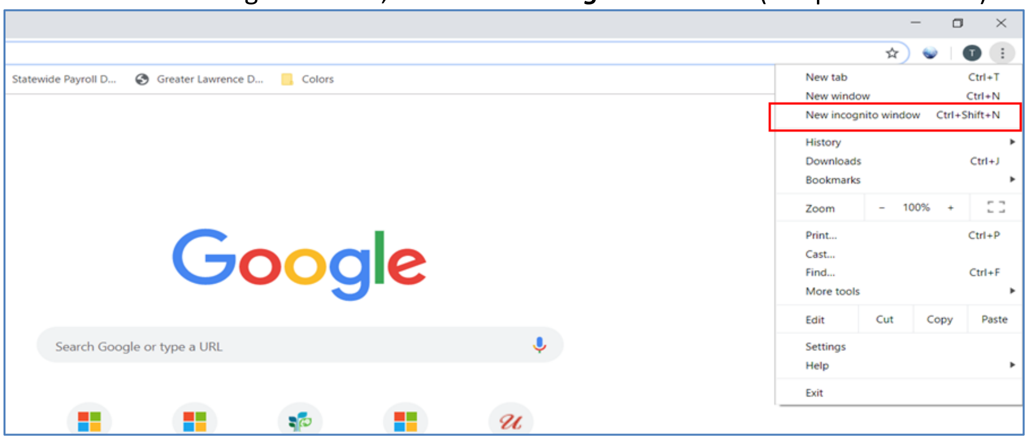
version	date	note	author
V1	062719		AG
V1.1	090419	Updated ALR email address	AG
V1.2	090319	Added appendix A	AG

V1.3	031521	General updates, email notification info	AG
V1.4	083021	Added updated guidelines for user requests	AG
V1.5	012422	Added section for FW-IRs	AG

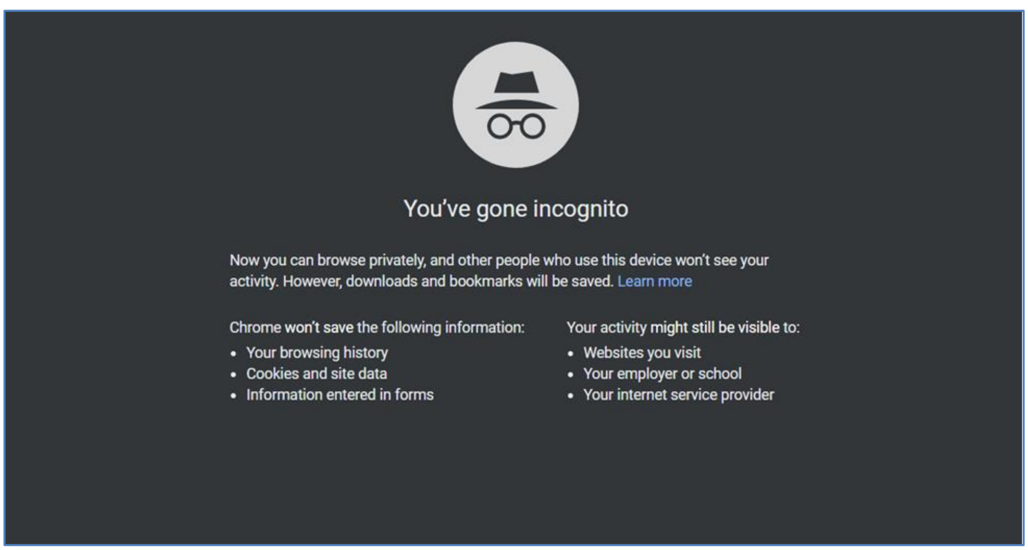
Appendix A – First Login & Troubleshooting Login Issues

If you have trouble logging into ALR, it may help to login using Chrome *Incognito.* Follow the steps outlined below:

- Open Google Chrome
- Once in Google Chrome, select ***New incognito window*** (see picture below):

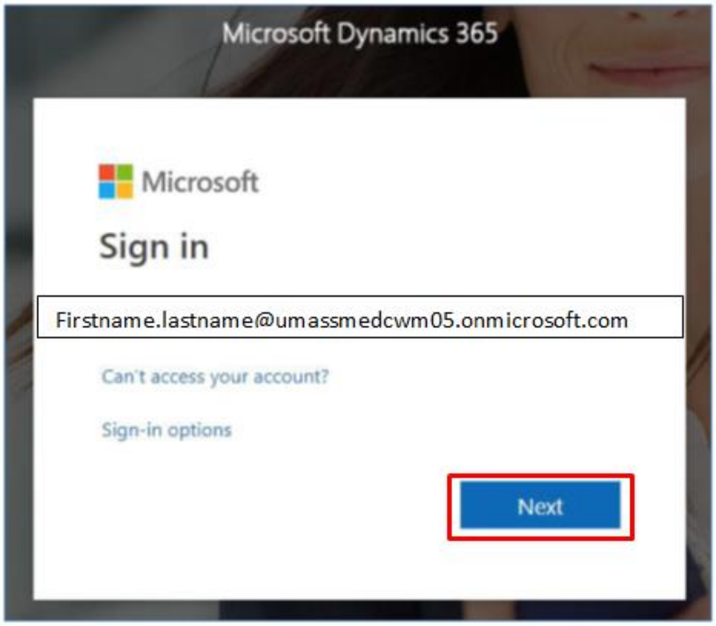


- You will see this screen:

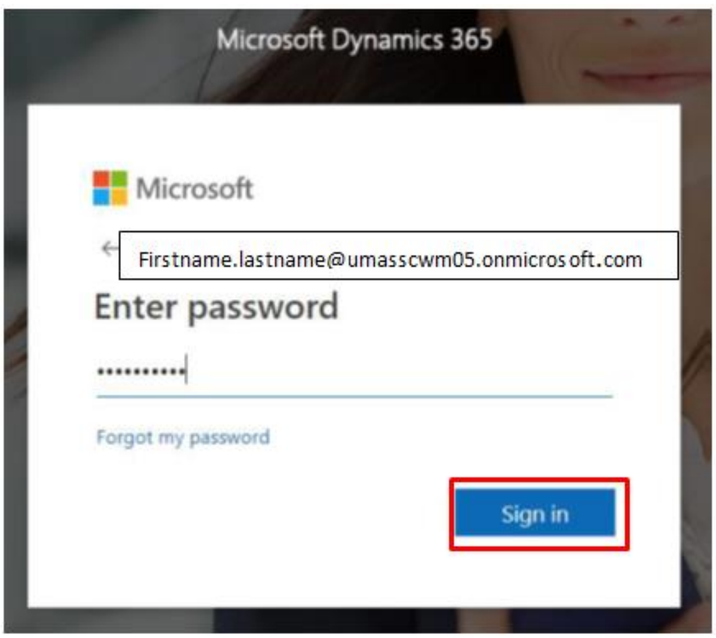


- Copy and paste or type in this URL: **https://umassmedcwm05.crm.dynamics.com/main.aspx**
- You will see the screen below
- Use the credentials sent to you for the Dynamics System. Credentials will be ***your*** firstname.lastname@umassmedcwm05.onmicrosoft.com

- Select *Next*

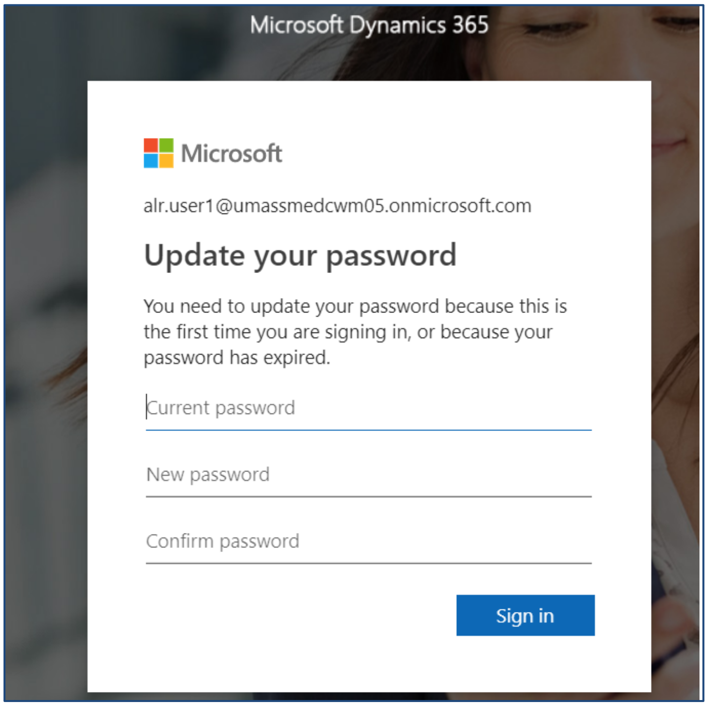


- Enter your password and click *Sign In*.



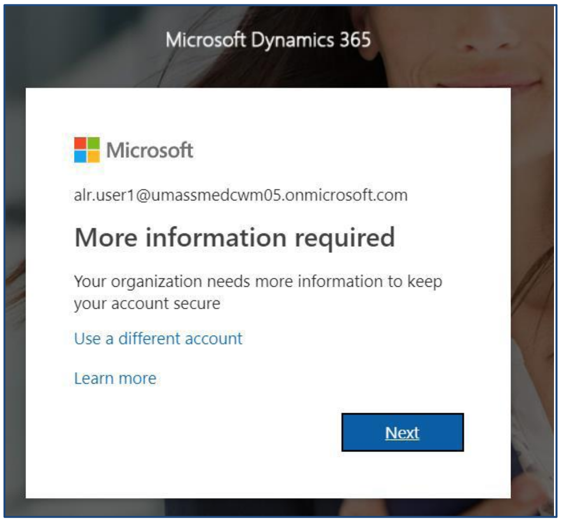
- A prompt will come up to change your password:
  - **Current Password**: enter the password provided to you previously ***(PASSWORD IS CASE SENSITIVE)***
  - **New Password** (at least 8 charters with at least one capital letter and a number and special character)
  - **Confirm Password** (renter your new password)

- Select *Sign in*

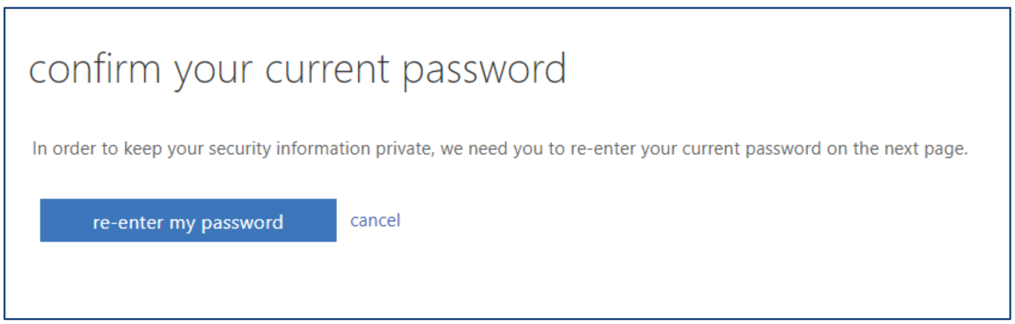


- A new screen will appear requiring signing of the Non-UMMS User Agreement
- You must click on the document and view it.
- After you view the document select *Accept*

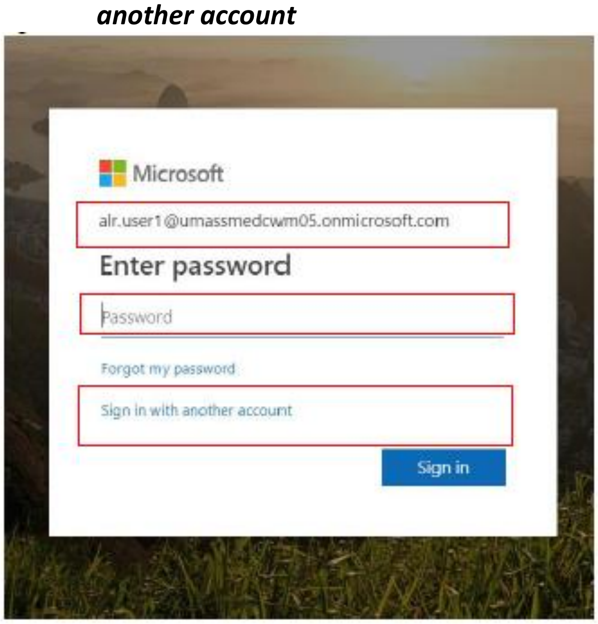
- A new screen will appear – Select *Next*



- A screen prompting you to confirm your password will display
- Select re-enter my password

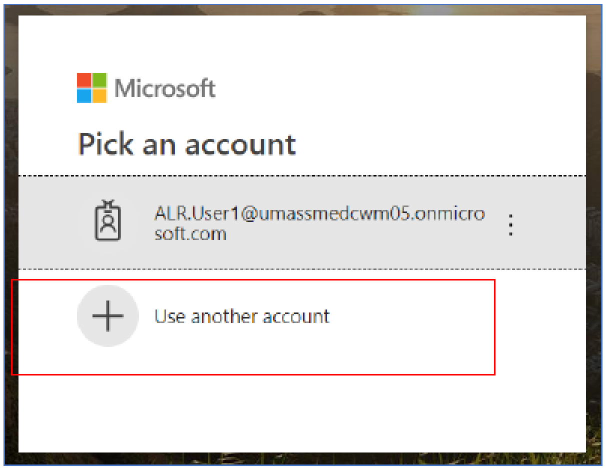


- Please check to make sure ***your user name is displaying***.
- ***If it is displaying***, type in the password you just created. Sign in
- **If you share a computer, the previous user may appear here. *If it is a different user name – select Sign in with another account***

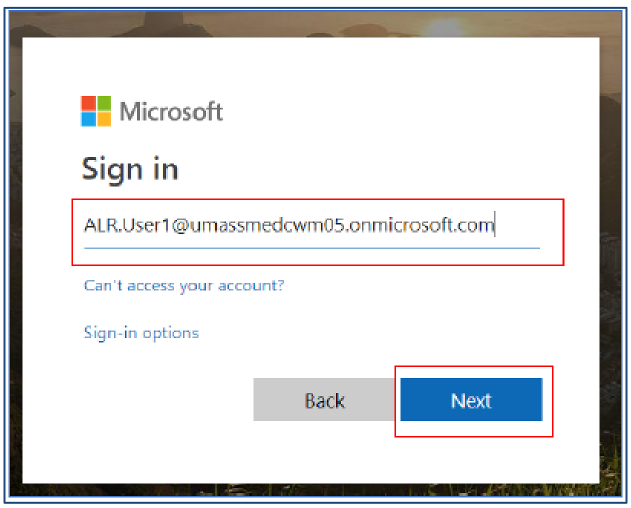


[Skip if already signed in with your user account]

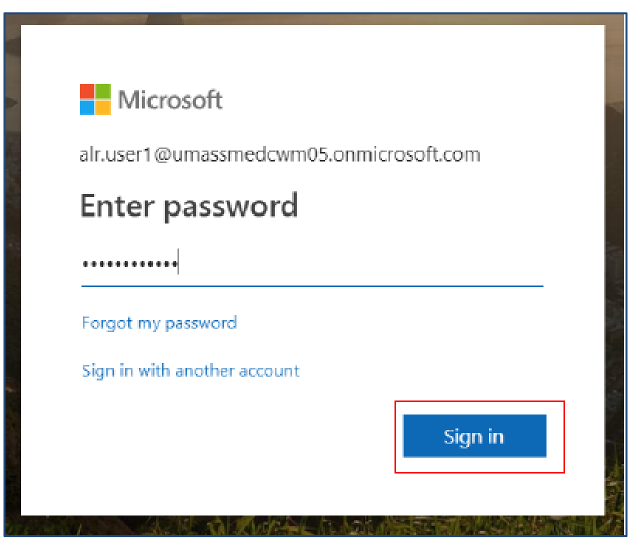
- Select *User another account*



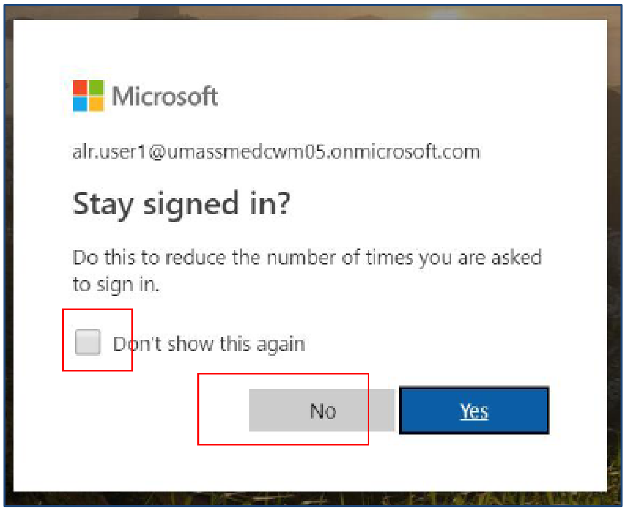
- Type in your username, and select *Next*



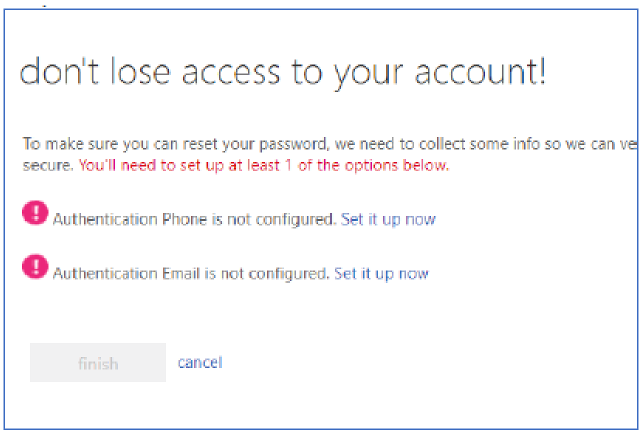
- Type in the password you just created, and click *Sign in*



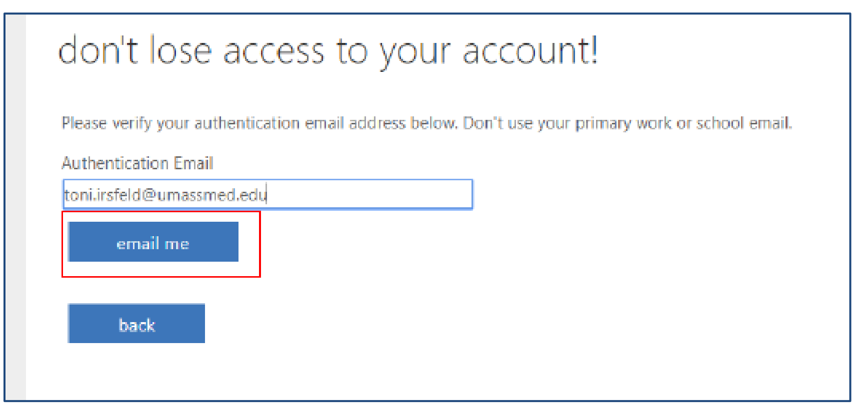
Select *No* when this screen displays and *Don't show this again*



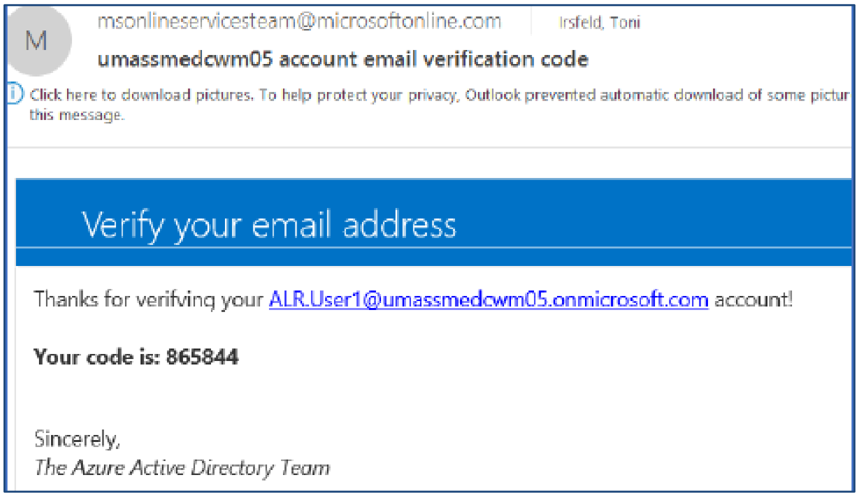
- Select the way you want to receive a password reset if you forget your password. This needs to be a phone number or a valid email address.



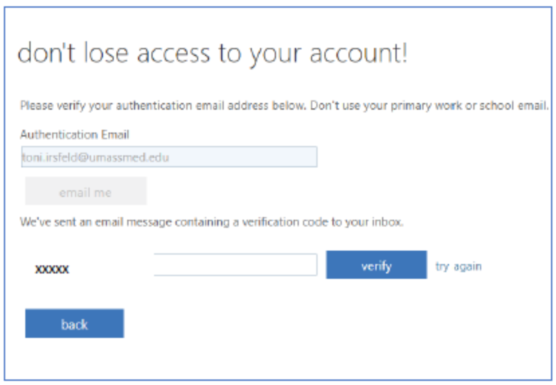
- An authentication code will be sent to the email or phone number you indicated.



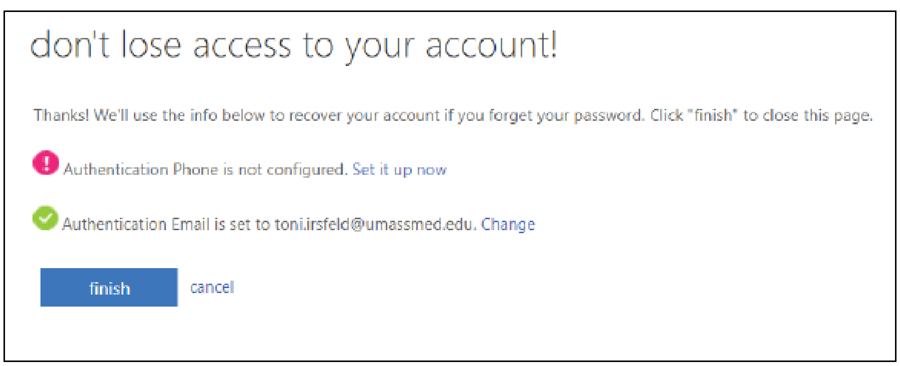
- Copy the code from your email or phone message



- Enter the code and click on *verify*



- Select *Finish*



- You should now be logged into the database