

Shared Review of Files for Healthcare Facilities

Instructions for healthcare facilities (HCF) that would like to have a process to review files and have then internally approved before they are submitted to the Quality and Patient Safety Division.

Assigning a Task

- 1) File owner completes SQR (or any report/file) in RLDatix
- 2) File owner uses SAVE AS INCOMPLETE rather than SUBMIT
- 3) File owner sends a TASK to any team member that would like to review before submission. This should ONLY be done via the TASKS function in the toolbar
 - a. Navigate to Tasks in the toolbar
 - i. Click on Tasks
 - ii. Click on New Task (next to Search Bar)
 - iii. Complete the following:
 1. Select Type
 2. File – **LEAVE BLANK**
 3. Select Priority
 4. Enter Deadline
 5. Delete the Assigned To
 6. In the Assigned To field, start typing the name or names of the person(s) to review the file. USE CAUTION when selecting the individual to assure that you are tasking the correct individual within your facility
 7. Type the description. Examples are: Please review and comment file # (ADD FILE NUMBER)
 8. Click Assignee Response Required
 9. Click New Task Creation email
 10. Click Task Completion email to (Creator)
 11. Click OK

Responding to a Task

- 1) The Assignee will receive an email in their regular email box that a Task has been assigned in RLDatix. You can access the file through RLDatix only.
- 2) Navigate to TASKS on left toolbar.
 - a. In the TASKS function
 - i. Click on All My Tasks on the left side of the form
 - ii. Click the box next to the new task
 - iii. Click Open Task
 - iv. Scroll to the bottom to Response Details
 - v. Type your response
 - vi. Click OK

Submitting the File after review

- 1) Navigate to the Info Center
- 2) Click on Incomplete/Not Submitted Files
- 3) Open the File by clicking on the file ID
- 4) Make any changes to the file
- 5) Click on Submit