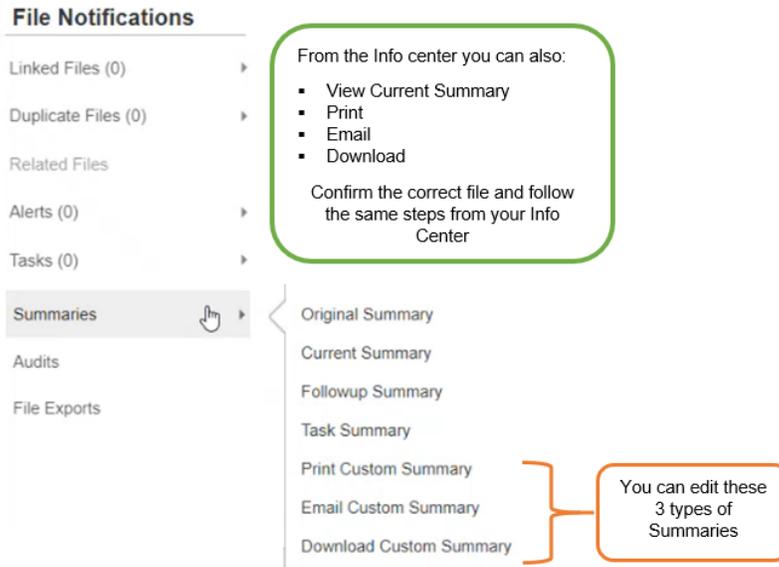


QUICK REFERENCE GUIDE

There are different types of summaries available to assist you in reviewing and sharing the event file. You can view and perform some of these actions from the Info Center and from within a file. This quick reference will review the steps to email a custom summary from within a file.

1. Open a file from the **Info Center** or through your email notification link
2. In the **File Notification** section, select **Summaries** to review the options



File Notifications

- Linked Files (0)
- Duplicate Files (0)
- Related Files
- Alerts (0)
- Tasks (0)
- Summaries**
- Audits
- File Exports

From the Info center you can also:

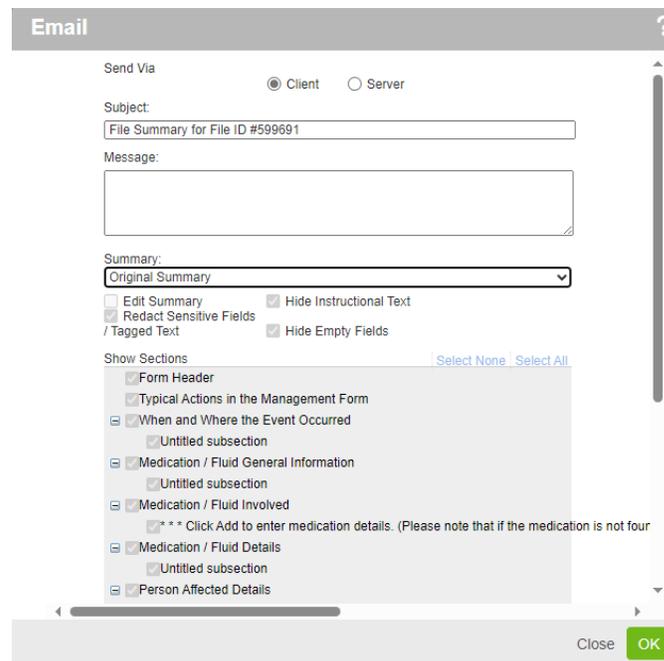
- View Current Summary
- Print
- Email
- Download

Confirm the correct file and follow the same steps from your Info Center

- Original Summary
- Current Summary
- Followup Summary
- Task Summary
- Print Custom Summary
- Email Custom Summary
- Download Custom Summary

You can edit these 3 types of Summaries

3. Click on the **Email Custom Summary** to open the **Email** summary page



Email ?

Send Via Client Server

Subject: File Summary for File ID #599691

Message:

Summary: Original Summary

Edit Summary Hide Instructional Text

Redact Sensitive Fields / Tagged Text Hide Empty Fields

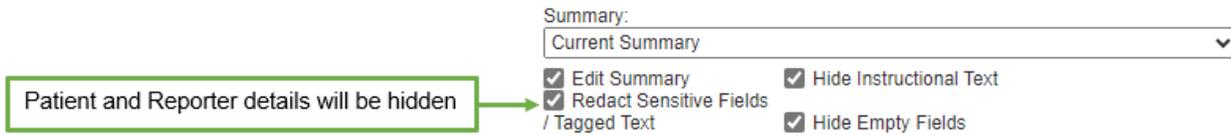
Show Sections [Select None](#) [Select All](#)

- Form Header
- Typical Actions in the Management Form
- When and Where the Event Occurred
 - Untitled subsection
- Medication / Fluid General Information
 - Untitled subsection
- Medication / Fluid Involved
 - ** Click Add to enter medication details. (Please note that if the medication is not four
- Medication / Fluid Details
 - Untitled subsection
- Person Affected Details

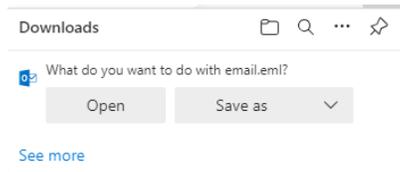
Close **OK**

RL – File Summaries

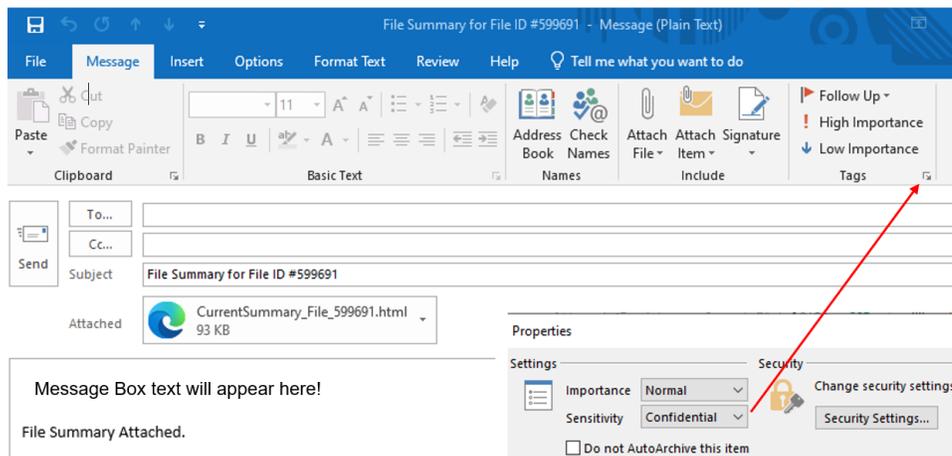
4. Select the type of summary to email from the drop-down box (**Original, Custom, Follow-up** or **Task Summary**)
5. Type in **Message** box, which will auto populate into Outlook email
6. Select **Custom Summary** to edit and modify which details fields are included in the summary. The original summary will include all details and should be shared with caution and in accordance with organization policy and PHIA



7. Select **OK** at the bottom right hand corner
8. The summary window will open and a download message will appear



9. Select **Open** and Outlook opens with the summary attached



Follow organization policies for sending sensitive emails, for example consider changing email setting to Confidential

This e-mail and/or any documents accompanying this transmission is intended for a specific individual(s) and the address(es) only, as well as a specific purpose, and may contain legally privileged or confidential information. Any unauthorized use, disclosure, dissemination or reproduction of this email or the documents is strictly prohibited. If you receive this transmission in error, please notify the sender immediately and return the original to the sender by regular mail or delete the original without printing or forwarding.

10. Address the email **To**, complete any steps necessary before sending emails with more sensitive information. Click the **Send** button.

QUESTIONS? Contact RL_Support@sharedhealthmb.ca