

QUICK REFERENCE GUIDE

Quick Search

With a Quick Search you can enter search criteria such as patient name or file ID number in the search criteria window.



1. Click the Search icon on the Navigation toolbar
2. Enter the criteria you are searching for in the text box, for example “Smith”

Search Page

Search for within Files in module Risk Search [More options](#)

3. Click the Search button
4. Note: The Quick Search method will search for your criteria through all fields in a file

Advanced Search

This search feature is used to search for a file by specific criteria. This feature can also be used to group files by safety event category, such as falls. You can filter (narrow down) the search further, to specific event type such as the type of medication/fluid error.

Tip – this is helpful when reviewing more than two safety events of the same category and type to identify trends and interventions (or if you’ve gone on vacation and now have 30 files in your inbox!)

1. From the **Search Page**, click on **More Options**. This opens the advanced search options
2. Click on the **File States** drop-down box to de-select or select options; for example, de-select **Closed** to only see open files.
3. Click on the **General Event Type** drop-down box to select the safety event category, for example **Fall**
4. Select additional options for your search as needed, for example under **Specific Event Type**, select **From Bed – No Rails etc.** Click on the magnifying glass **Search** icon to view files.

Note: Once **Search** is selected, you can narrow the search further by clicking on **More options**, this returns you to the advanced search options and the prior selections will be saved. Select additional options from applicable fields and click Search.

Search Page Example of Advance Search

Search for within Files in module Risk Search [More options](#)

Click on **More options** to narrow down files to **Specific Event Type** From Bed – No Rails

Open	More	File ID	File Name	Last Name	First Name	MRN	Type of Person Affected	Specific Event Type	Event Date	Site/Community Area	Regional Program	File State
<input checked="" type="checkbox"/>		599663	Fall Event (599663)	FLINTSTONE	FRED	123456789	In-patient	From Bed - No Rails	11-28-2023	Beausejour Health Centre & Community Health Office		In-Progress
<input type="checkbox"/>		599696	Fall Event (599696)				Person Not Applicable	Unknown/Found on Floor	03-18-2024	Flin Flon General Hospital		In-Progress
<input type="checkbox"/>		599686	Fall Event (599686)	JAMES	HOLLY	516279	Resident (LTC)	While Ambulating Without Required Assistance	03-14-2024	Northern SPIRIT Manor		New
<input type="checkbox"/>		599665	Fall Event (599665)	FLINTSTONE	WILMA	123456789	In-patient	From Bed - No Rails	11-29-2023	Thompson General Hospital		New
<input type="checkbox"/>		599660	Fall Event (599660)	FLINTSTONE	WILMA	123456789	In-patient	From Bed - No Rails	11-23-2023	Flin Flon General Hospital		New

Using the Search Page

1. Open **File ID** and complete **Work Done On File**. Once saved, select **Close** or **Exit**, and RL will return you to the other file IDs from your advanced search

Saving Searches

1. In the Advance search view, populate your search criteria
2. Click the **Save** button in bottom right corner
3. Type in a name for the search in the **Saved Searches** dialog box
4. Select **OK**

The screenshot displays the 'Search Page' interface. At the top, there are search filters: 'Search for' (Smith), 'within' (Files), and 'in module' (Risk), with a 'Search' button and 'More options' link. Below this is a 'Saved Searches' section with an empty dropdown menu and a 'Delete' button. The 'Field Search' section contains various input fields: 'File States' (4 selected), 'File ID', 'File Name', 'First Name', 'Last Name', 'MRN', 'PHIN', 'Type of Person Affected', 'General Event Type' (with an example 'Med/Fluid, Fall, Security'), 'Specific Event Type' (with an example 'Missed Dose, From bed'), 'Site/Community Area', 'Regional Program', 'Event Date' (mm-dd-yy to mm-dd-yy), 'File State', 'Owner Name', 'Risk Status', 'Review Complete?', 'Area/Unit', 'Is this critical incident verified?', 'Severity Level (Actual)', and 'MHSAL #'. A dropdown menu for 'File States' is open, showing options: Incomplete, New, In-Progress, Closed, Deleted, and Deleted-Inc. At the bottom, the 'Advanced Search' section includes buttons for 'Edit in Full Screen', 'Copy', 'Paste', and 'Clear Expression', followed by a search expression builder with 'Select a Field', 'Select Operator', and 'Type a Value' dropdowns. The bottom right corner has 'Close', 'Clear', 'Save', and 'Search' buttons.

QUESTIONS? Contact RL_Support@sharedhealthmb.ca