Inspection Reports

Review Inspection Reports

- Select the **Inspection Reports** button on the Home Page.

- Use the filters located at the top of the page to search by **name, status** and **date** range.


Advanced Search Features

- Select **Advanced Search** at the top of the page.
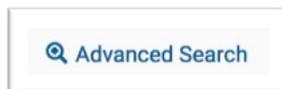
- Filter by **Finding Status** to view reports with items that are Ready for Verification, Not Resolved, etc.
- Filter by **Inspectors** to view only reports that you have contributed to.
- Additional features allow for search by location manager, unit name, or key words used in comments.
- Enter **Search**.
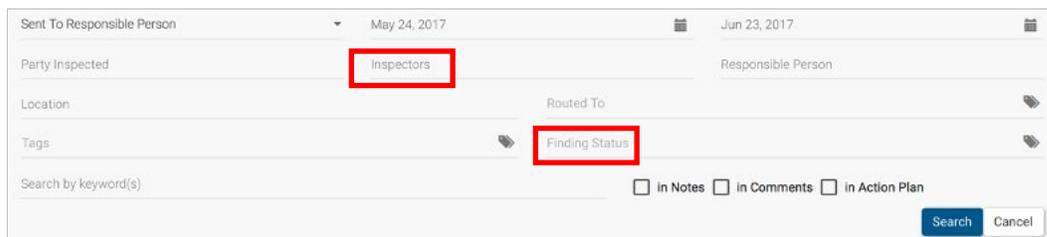
- Select the report you wish to view.

CDPH State SNF Relicensing Survey

Eskaton Care Center | 455 Florin Rd, Sacramento, CA 95831
Contributed By: Tom Hanks
Open Findings: 2

Edit Reports

- Reports can be edited while in **Draft** status.
- Select **+Add Incident** beside a checklist question to add a new finding.

⊕ Add Incident

- Select the ellipsis beside an exisiting finding to edit the finding details.

Complete a Report

- Complete all checklist questions for the most accurate compliance metrics.
- Select the ellipsis beside each category or at the top of the report.
- Select **Set Responses to Compliant, Set Responses to N/A or Set Response.s to N/O** (if available)

Change the Status of a Report

- Reports in **Draft** mode can be submitted by selecting the **Submit** button at the top of the report.
  If your checklist contains the Admin Review feature reports will automatically move to the review phase after selecting Submit
- Reports in **Pending Upload** or **Ready for Review** status can be sent to the Responsible Person by selecting the Send button at the top of the report.
- For checklists that include the **Ready for Review** step you have the option to customize the email that is sent to the responsible person(s). The email window will open after you select **Send** on the report.
  Do not edit the report link, as that is unique to each report.
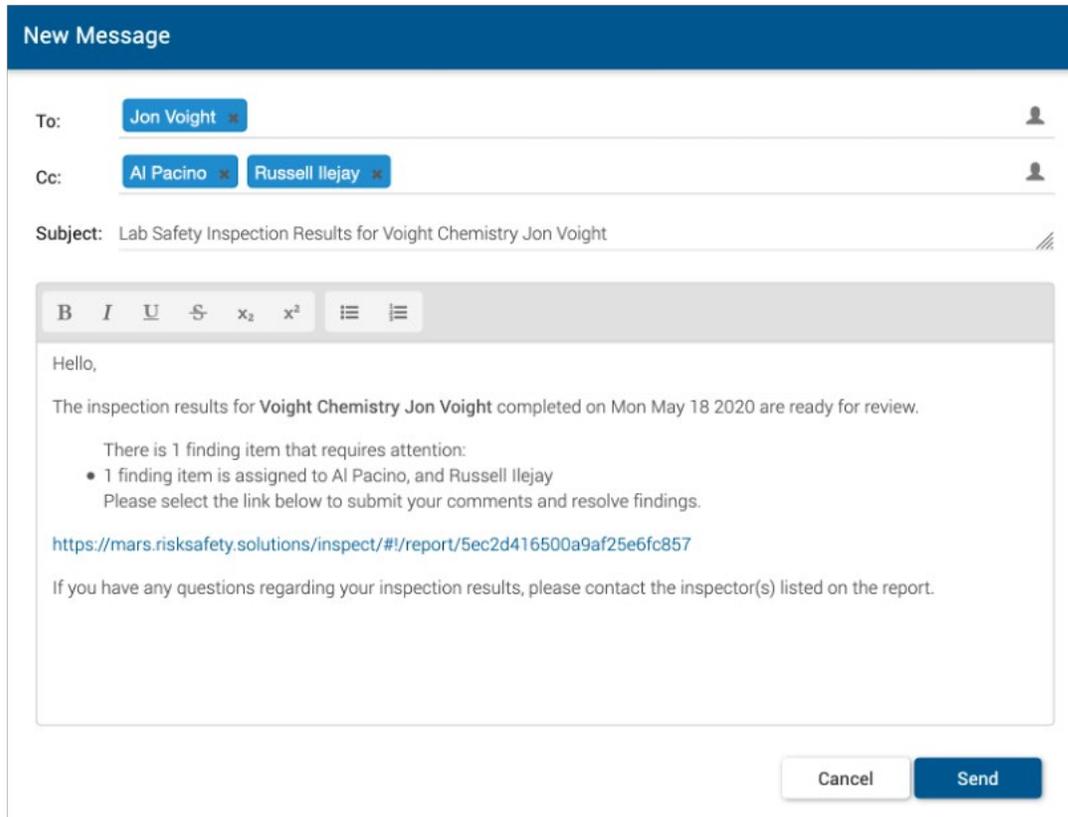
View All Open Findings

- Select the **Inspection Reports** button on the Home page.
- Select **Sent to Responsible Person** from the report status dropdown
- Select **Search**

Verify and Resolve Findings

- Findings identified as **Requires Verification** are indicated as such in the report
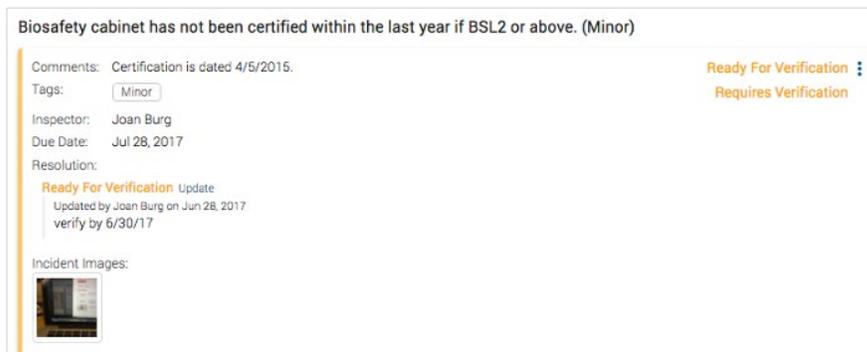
- Select ellipsis for the finding.

- Select applicable option to change the status of the finding.

Management

Make Changes to Departments

- Select the **Management** tab on the Home page.
- Select the **Location/People** tab.
- Use the search field to find the desired department.
- Select the navigation dots beside the search box.
- Select **Edit**.
- Make desired changes and select **Save**.
- For checklists that are synced with **Profile** (indicated by "Auto Sync") select the Profile link to make edits to groups.

Mapping Departments to Buildings

- Select the **Management** tab on the Home page.
- Select the **Location/People** tab.
- Use the search field to find the desired department.
- Select the ellipsis beside the search box.
- Select **Edit**.
- In the "Building" field, search for the correct building.
- In the "Floor" field, search for the correct floor.
- Select **Save**.

Adding New Departments

- Select the **Management** tab on the Home page.
- Select the **Location/People** tab.
- Select the ellipsis beside the search box.
- Select **Add**.
- Enter department name, description, building, and floor.
- Select **Add**.

Add a Responsible Person

- To add a Responsible Person to a department, select the **Management** tab on the Home page.
- Select the **Location/People** tab.
- Use the search field to find the desired department.
- Select the ellipsis beside "Responsible People".
- Select **Add**.
- Search by name or email.
- Select **Add**.

Delete a Responsible Person

- To delete a Responsible Person to a department, select the **Management** tab on the Home page.
- Select the **Location/People** tab.
- Use the search field to find the desired department.
- Select the ellipsis beside "Responsible People".
- Select **Delete**.
- Select the red **Delete** button.

Add an Inspector/Administrator

- To add an Inspector or Administrator, select the **Management** tab on the Home page.
- Select the **Program Roles** tab.
- Select the ellipsis beside "Program Roles".
- Select **Add**.
- Search by name or email.
- Select the desired role(s).
- Select **Save**

Edit or Delete an Inspector/Administrator

- To add an Inspector or Administrator, select the **Management** tab on the Home page.
- Select the **Program Roles** tab.
- Select the ellipsis beside the person to be edited/deleted.

- Select **Edit** to add or remove a role.
- Select **Save**.
  OR
- Select **Delete** to remove person from program.
- Select the red **Delete** button.

Add Routing Groups for Finding Resolution

- By default, findings are routed to the Responsible Person for the department. However, you can add other entities that can be selected for the resolution of specific findings (ie Facilities, Housekeeping, etc).
- Select the **Management** tab on the Home page.
- Select the **Routing** tab.
- Select the ellipsis beside "Routing Group".
- Select **Add**.
- Enter the name of the Routing Group.
- Select **Save**.

Add Contacts for Routing Groups

- Contacts will receive notifications (if enabled for your group) for findings routed to their specialty.
- Select the **Management** tab on the Home page.
- Select the **Routing** tab.
- Select the ellipsis beside Routing Group you wish to assign a contact to.
- Select **Add Person**.
- Search by name or email.

Add Tags

- Tags can be used to associate checklist questions for data reporting.
- Select the **Management** tab on the Home page.
- Select the **Checklist** tab.
- Select the desired checklist from the dropdown.
- Select the ellipsis beside "Tags".
- Select **Add**.
- Enter the tag name.
- Select **Save**.

Edit or Delete Tags

- Select the **Management** tab on the Home page.
- Select the **Checklist** tab.
- Select the ellipsis beside Tag to be edited.

- Select **Edit**.
- Enter desired changes.
- Select **Save**.
  OR
- Select **Remove** to remove the tag.
- Select the red **Delete** button.

Creating a New Checklist Category

- Select the **Management** tab on the Home page.
- Select the **Checklist** tab.
- Select the desired checklist from the dropdown.
- Select the ellipsis beside "Checklist Categories".
- Select **Add**.
- Enter category name.
- Select whether findings can be repeated in the category multiple times.
- Select whether category is required prior to report being sent to Responsible Person.
- Select **Save**.

Edit or Delete Checklist Category

Please note, that deleting checklist categories will affect reporting associated with those findings
- Select the **Management** tab on the Home page.
- Select the **Checklist** tab.
- Select the ellipsis beside "Checklist Categories" to be edited.
- Select **Edit**.
- Enter desired changes.
- Select **Save**.
  OR
- Select **Remove** to remove the finding.
- Select the red **Delete** button.

Creating Checklist Questions

- Select the **Management** tab on the Home page.
- Select the **Checklist** tab.
- Select the ellipsis beside the desired checklist category.
- Select **Create Finding**.
- Enter Finding, Action Plan (if applicable), Default Tags (if applicable), Default Routing Group (if applicable), Days to Resolve (if applicable).
- Select **Save**.

Edit or Delete Checklist Questions

Please note, that deleting checklist questions will affect reporting associated with those findings

- Select the **Management** tab on the Home page.
- Select the **Checklist** tab.
- Select the ellipsis beside Finding to be edited.
- Select **Edit**.
- Enter desired changes.
- Select **Save**.
  OR
- Select **Remove** to remove the finding.
- Select the red **Remove** button.