

## Overview

This job aid is intended as a guide to the Enterprise Incident Management (EIM) roles for Office of Long-Term Living (OLTL) and Bureau of Autism Services (BAS) program office staff and providers. Use this guide to view the access each role has to EIM functionality and screens. Use the table of contents below to find the roles that are applicable to your program office.

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## Program Office Roles

### Incident Management Roles

Role Name	Role Description
Incident Reporter*	<ul style="list-style-type: none"> <li>• Enter the first and final sections of the incident report</li> <li>• <b>Submit the final section</b></li> <li>• View the incident investigation and the management review in read-only mode</li> <li>• Request a report extension</li> <li>• Link/unlink incidents</li> <li>• Delete incidents prior to management review</li> <li>• Access, view and use EIM reports</li> <li>• <b>Mark an incident confidential and assign an Incident Point Person to the incident report</b></li> <li>• View and update incident reports that have been marked confidential</li> </ul>
Incident Point Person*	<ul style="list-style-type: none"> <li>• Enter the first and final sections of the incident report</li> <li>• View the incident investigation and management review in read-only mode</li> <li>• Request a report extension</li> <li>• Link/unlink incidents</li> <li>• Delete incidents prior to management review</li> <li>• Access, view and use EIM reports</li> <li>• <b>View and update incidents that have been marked confidential by the Incident Reporter</b></li> </ul>
Incident Reviewer	<ul style="list-style-type: none"> <li>• Create, modify and submit the management review document</li> <li>• Assign a program office investigator to investigate the incident</li> <li>• View the first and final sections of the incident report in read-only mode</li> <li>• View the investigation document in read-only mode</li> <li>• Request a report extension</li> <li>• Access, view and use EIM reports</li> </ul>
Incident Investigator	<ul style="list-style-type: none"> <li>• Create, modify and submit the investigation document</li> <li>• View the first and final sections of the incident report in read-only mode</li> <li>• View the management review in read-only mode</li> <li>• Request a report extension</li> <li>• Link/unlink incidents</li> <li>• Access, view and use EIM reports</li> </ul>
Incident Admin	<ul style="list-style-type: none"> <li>• View the incident first and final sections, incident investigation documents and incident management review documents in read-only mode</li> <li>• Delete and undelete incidents</li> <li>• Link/unlink incidents</li> <li>• Access, view and use EIM reports</li> </ul>
Incident Read-Only	<ul style="list-style-type: none"> <li>• View the incident first and final sections, incident investigation documents and incident management review documents in read-only mode</li> <li>• View linked incidents</li> <li>• Access, view and use EIM reports</li> </ul>

\*Please note the **Incident Reporter** and the **Incident Point Person** roles are **NOT** interchangeable. Incident

Reporter is the only role that can submit the final section of the incident report.

## Complaint Management Roles

Role Name	Role Description
Complaint Reporter	<ul style="list-style-type: none"> <li>• Create, modify and submit the complaint report</li> <li>• View the complaint review investigation in read-only mode</li> <li>• View the complaint management review in read-only mode</li> <li>• Link/unlink complaints</li> <li>• Request a report extension</li> <li>• Delete a complaint prior to management review</li> <li>• Add, modify and delete additional notes</li> <li>• Access, view and use EIM reports</li> </ul>
Complaint Reporter and Investigator	<ul style="list-style-type: none"> <li>• Create, modify and submit the complaint report</li> <li>• Create, modify and submit the complaint review investigation</li> <li>• <b>Create and modify the complaint management review</b></li> <li>• Assign the complaint investigator (and may assign self)</li> <li>• Link/unlink complaints</li> <li>• Request a report extension</li> <li>• Delete a complaint prior to management review</li> <li>• Add, modify and delete additional notes</li> <li>• Access, view and use EIM reports</li> </ul>
Complaint Investigator	<ul style="list-style-type: none"> <li>• Create, modify and submit the complaint investigation</li> <li>• View the complaint report in read-only mode</li> <li>• View the management review in read-only mode</li> <li>• Link/unlink complaints</li> <li>• Request a report extension</li> <li>• Add, modify and delete additional notes</li> <li>• Access, view and use EIM reports</li> </ul>
Complaint Reviewer*	<ul style="list-style-type: none"> <li>• <b>Create, modify and submit the complaint management review</b></li> <li>• View the complaint report in read-only mode</li> <li>• View the complaint review investigation in read-only mode</li> <li>• Link/unlink complaints</li> <li>• Request a report extension</li> <li>• Add, modify and delete additional notes</li> <li>• Access, view and use EIM reports</li> </ul>
Complaint Admin	<ul style="list-style-type: none"> <li>• View the complaint report, investigation and management review documents in read-only mode</li> <li>• Delete and undelete complaint reports</li> <li>• Link/unlink complaints</li> <li>• Add, modify and delete additional notes</li> <li>• Access, view and use EIM reports</li> </ul>

Complaint Read-Only	<ul style="list-style-type: none"> <li>• View the complaint report, investigation and management review documents in read-only mode</li> <li>• View linked complaints</li> <li>• View additional notes</li> <li>• Access, view and use EIM reports</li> </ul>
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\*Please note the **Complaint Reviewer** role is the only role that can submit the complaint review document.

## Custom Report and Configuration Roles

Role Name	Role Description
Custom Report Admin	<ul style="list-style-type: none"> <li>• Access, view and use EIM reports</li> <li>• Save queries for the Incident and Complaint Custom Report</li> </ul>
Program Office Configuration Admin	<ul style="list-style-type: none"> <li>• Access, manage and update EIM configuration using the EIM administrative screens</li> <li>• Modify system news</li> </ul>
Program Office Configuration Read-Only	<ul style="list-style-type: none"> <li>• View EIM administrative screens</li> </ul>

# EIM Roles Job Aid

## Provider Organization Roles (Direct Service Providers, and Service/Supports Coordinators)

### Incident Management Roles

Role Name	Role Description
Incident Reporter*	<ul style="list-style-type: none"> <li>• Enter the first and final sections of the incident report</li> <li>• <b>Submit the final section</b></li> <li>• View the incident investigation and the management review in read-only mode</li> <li>• Request a report extension</li> <li>• Link/unlink incidents</li> <li>• Delete incidents prior to management review</li> <li>• Access, view and use EIM reports</li> <li>• <b>Mark an incident confidential at the provider level and assign an Incident Point Person to the incident report</b></li> <li>• View incident reports that have been marked confidential</li> </ul>
Incident Point Person*	<ul style="list-style-type: none"> <li>• Enter the first and final sections of the incident report</li> <li>• View the incident investigation and the management review in read-only mode</li> <li>• Request a report extension</li> <li>• Link/unlink incidents</li> <li>• Delete incidents prior to management review</li> <li>• Access, view and use EIM reports</li> <li>• <b>View and update incidents that have been marked confidential by the Incident Reporter</b></li> </ul>
Incident Investigator** <b>Note:</b> For BAS providers only	<ul style="list-style-type: none"> <li>• Create, modify and submit the investigation document</li> <li>• View the first and final sections of the incident report in read-only mode</li> <li>• View the management review in read-only mode</li> <li>• Request a report extension</li> <li>• Link/unlink incidents</li> <li>• Access, view and use EIM reports</li> </ul>
Incident Read-Only	<ul style="list-style-type: none"> <li>• View the incident first and final sections, incident investigation documents and incident management reviews in read-only mode</li> <li>• Access, view and use EIM reports</li> </ul>

\*Please note the **Incident Reporter** and the **Incident Point Person** roles are **NOT** interchangeable. Incident Reporter is the only role that can submit the final section of the incident report.

\*\*Certified Investigators must be assigned the **Incident Investigator** role in order to enter investigation information in EIM. Certified Investigators are for Bureau of Austim Services (BAS) only. Office of Long-Term Living (OLTL) providers will not have access to the Incident Investigator role.