

Manager Instructions

Safety Reporting System (SRS)

1. Find & Open Incidents
2. Close an Incident
3. Reopen an Incident
4. Transfer Incident to Another Site/Department or Change Severity
5. Abandon Report
6. Run Reports
7. Information Center
8. Forward Notifications (For Manager Absence)

Healthy People, Healthy Saskatchewan

The Saskatchewan Health Authority works in the spirit of truth and reconciliation, acknowledging Saskatchewan as the traditional territory of First Nations and Métis People.

1. Find/Open Incidents

There are several ways to find and open incidents or see a list of certain types of incidents (called events in the system):

Open the link to the incident that comes in your e-mail. This link will only work the first time the report is accessed. The email will include the event number in the subject line and the top line of the email.

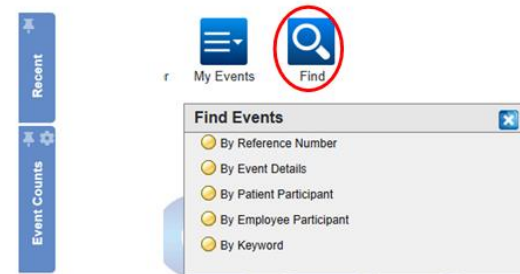
OR

Open the system with **EDGE** and search using one of the blue menu options:

Find—by Event Details: Ensure your facility is loaded & check additional criteria—this is where you can choose to only display code 3, 4, 5 or only certain incident types.

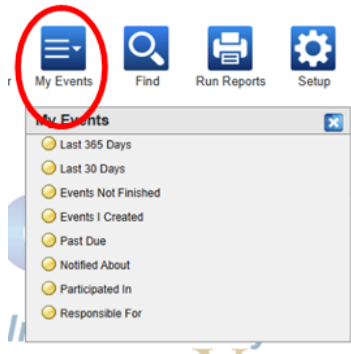
Enter the required search fields as much as possible using the text boxes, drop downs, calendars, etc.

Click Search



1. Find/Open Incidents (More Options)

My Events

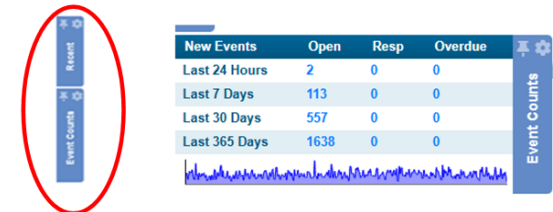


Recent Hover over his icon to display recent incidents

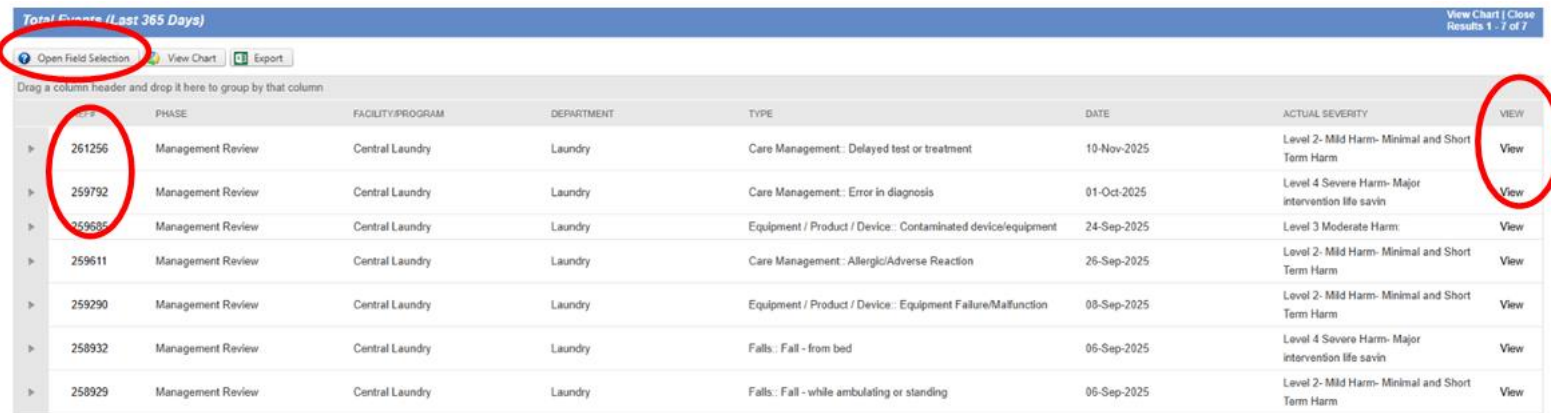
Selecting blue links will open all incidents within that time frame/category



Event Counts Hover over this icon to display recent incidents & whether they are open, responded to, or overdue



1. Find/Open Incidents (More Options)



Total Events (Last 365 Days) View Chart | Close Results 1 - 7 of 7

[Open Field Selection](#) [View Chart](#) [Export](#)

Drag a column header and drop it here to group by that column

	PHASE	FACILITY/PROGRAM	DEPARTMENT	TYPE	DATE	ACTUAL SEVERITY	VIEW
261256	Management Review	Central Laundry	Laundry	Care Management: Delayed test or treatment	10-Nov-2025	Level 2- Mild Harm- Minimal and Short Term Harm	View
259792	Management Review	Central Laundry	Laundry	Care Management: Error in diagnosis	01-Oct-2025	Level 4 Severe Harm- Major intervention life savin	View
259605	Management Review	Central Laundry	Laundry	Equipment / Product / Device: Contaminated device/equipment	24-Sep-2025	Level 3 Moderate Harm	View
259611	Management Review	Central Laundry	Laundry	Care Management: Allergic/Adverse Reaction	26-Sep-2025	Level 2- Mild Harm- Minimal and Short Term Harm	View
259290	Management Review	Central Laundry	Laundry	Equipment / Product / Device: Equipment Failure/Malfunction	08-Sep-2025	Level 2- Mild Harm- Minimal and Short Term Harm	View
258932	Management Review	Central Laundry	Laundry	Falls: Fall - from bed	06-Sep-2025	Level 4 Severe Harm- Major intervention life savin	View
258929	Management Review	Central Laundry	Laundry	Falls: Fall - while ambulating or standing	06-Sep-2025	Level 2- Mild Harm- Minimal and Short Term Harm	View

View incidents that are listed in your search results by selecting the number on the left, or “view” on the right.

When you have finished with the incident and exit, you will be returned to your list.

Use Open Field Selection to choose which headers you would like displayed.

2. Close an Incident

Code 3, 4, 5 incidents have mandatory fields that must be completed before the incident will close.

1. Review incident and take appropriate action. Edit incident information as required.

2. Under section Phase Progression select Follow-up:

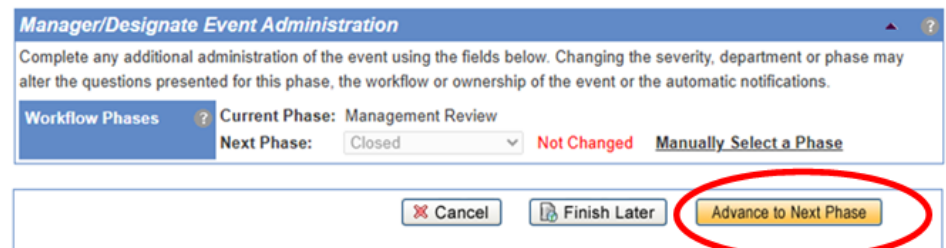


The screenshot shows a 'Phase Progression' window with a table of incident history. The table has columns for Phase History, Changed Date, Duration, and Advanced By. The first row is 'Management Review' with a date of 9/17/2025 10:55 hrs, a duration of 1 month, and 'Auto Advance'. A 'Follow-up' button is circled in red next to this row. The second row is 'Event Created' with a date of 9/17/2025 10:55 hrs, a duration of 3 minutes, and 'Safety Conscious Reporter'. The third row is 'Event Entry' with a date of 9/17/2025 10:51 hrs, a duration of 3 minutes, and 'Safety Conscious Reporter'. There is an 'Edit' button next to the 'Event Entry' row. At the bottom, there is an 'Other Actions' button and a 'Done' button.

Phase History	Changed Date	Duration	Advanced By
Management Review	9/17/2025 10:55 hrs	1 month	Auto Advance
Event Created	9/17/2025 10:55 hrs	3 minutes	Safety Conscious Reporter
Event Entry	9/17/2025 10:51 hrs	3 minutes	Safety Conscious Reporter

3. Use the Follow-up Actions section to document - Click details/Add New for a Task that is not listed

4. Under Manager/Designate Event Administration section select advance to next phase. This will close out the incident. If you need to continue working you can choose Finish Later button.



The screenshot shows the 'Manager/Designate Event Administration' window. It contains a section for 'Workflow Phases' with a 'Current Phase' of 'Management Review' and a 'Next Phase' of 'Closed'. There are buttons for 'Cancel', 'Finish Later', and 'Advance to Next Phase'. The 'Advance to Next Phase' button is circled in red.

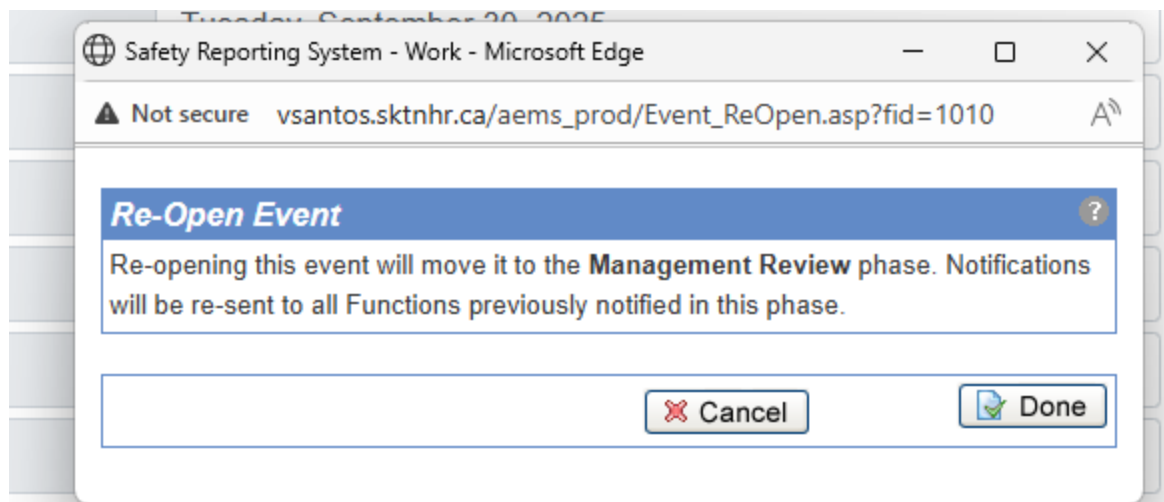
3. Reopen an Incident

**An incident may be returned to a previous phase when additional information or re-notification is required*

1. Scroll to the bottom of report to Phase Progression

2. Select Open

3. When the pop-up appears, select Done and the report will be moved back to Management Review



4. Transfer Incident to Another Site/Department/Change Severity

**A Manager/Delegate can transfer the incident to a different department of responsibility if the initial Site/Department/Severity selected is no longer appropriate.*

1. In Phase Progression Select Follow-up

Phase Progression				
Phase History	Changed Date	Duration	Advanced By	
Management Review	8/22/2025 22:45 hrs	14 days	Auto Advance	<button>Follow-up</button>
Event Created	8/22/2025 22:45 hrs		Safety Conscious Reporter	
Event Entry	8/22/2025 22:26 hrs	19 minutes	Safety Conscious Reporter	<button>Edit</button>

2. Scroll to Event Information Section and select Site/Department/Severity

 Falls >> Other Cancel | Done

Event Information Ref: 255888 View ?

Facility	Central Laundry	Select Another...	
Event Date	05 Jun 2025		Event Time 09:00 hrs
Department	Laundry	Other Departments	
Event Type	Falls		
	Other		
Actual Severity	Level 1- No Harm- No treatment Required		
Potential Severity	Level 2- Mild Harm- Minimal and Short Term Harm		
Location	Other		

3. Select Done

5. Abandon Incident

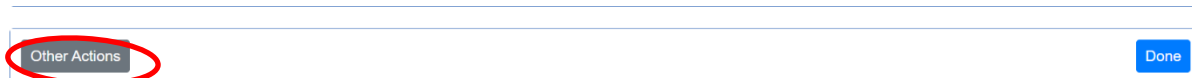
**A Manager/Delegate can abandon a report IF they see fit.*

Examples of appropriate circumstances to abandon a report:

1. The report is a duplicate
2. The report is not a patient safety event

1. Open the report you wish to abandon

2. Scroll to the bottom left of the report, select the “Other Actions” button.



3. Select “Perform Action”

Select Actions

Actions that can be performed include Abandoning or Deleting.

Events must be Abandoned before they can be Deleted. Abandoned events will not appear in any statistics.

☒ Abandon Event

Perform ActionClose

**If you perform this process twice, there will be an option to “Delete Event” - do NOT delete.*

5. Run Reports



1. Select Run Reports from your top menu
2. Select Report and Report Type: See most used reports section for details on each type
3. Select Facility. Ensure you load facility if option shows (will autofill if you have access to one facility only). If you have multiple facilities in your portfolio, you may choose one or leave at Any Facility/Program
4. Select Department (will autofill if you only have one department, or you can select Permitted Departments, or run each department separately)

Different reports will have different requirements to selects: Most reports will require a date range, and sorting structure. See example from Detailed Information: Event Comments Report.

5. Select Export to export to excel or select preview for short summary (printable)

Standard Reports



Counts Listings



Detailed Information



Event Trends



Follow-up Compliance



Maintenance



Medication



Security Audit



WebDisplay

Report Parameters

Event Listing By Group - Shows a detailed event listing grouped by the options shown below.

Please complete the report parameters listed below.

Select Group	Type		
Event Type	Any Type		
Date Range	From	7/1/2026 12:00 AM	
	To	7/31/2026 11:59 PM	
Facility/Program	Any Facility/Program		
Department	All Permitted Departments		
Location	All Locations		
Severity	All	Select	
Include If Near Miss	☒		
Include If Actual Event	☒		

[Export](#) [Preview](#)



5. Run Reports

Standard Reports Detailed Information

Event Comment By Participant: Include parameters chosen: Incident Number: Incident Date: Incident time: Facility: Department: Incident Type: Location: Phase: Comment: Reporter: Participant Name

Event Comments Report: Includes: Incident Number: Incident Date: Facility: Incident Type: Severity: Phase: Comment: Reporter: Comment Date

Event Information: Incident Number: Incident Date: Incident Time: Facility ID/ Name: Department: location: Actual Severity; Potential Severity: Incident Type: Phase: Reporting Person

Summary Status (will also print chart if selected): Facility/ Department Parameters: Incident Number: Status Changes: Incident Date; Fatality; Potential/Actual incident: Phase: Facility: Department: Type: Severity: Review Duration



Detailed
Information

Detailed_Information Click on a Report to Select.

- Event Comments By Participant
- Event Comments Report
- Event Information
- Summary Status

5. Run Reports

Standard Reports Count Listings

The **'Count'** reports tally totals based on each category: Drug Name, Group, Location, Medication Type.

The **'Listing'** reports provide more insight on the reports, based on Group and Individual.



Counts
Listings

Counts_Listings Click on a Report to Select.

- Event Count by Drug Name
- Event Count by Group
- Event Count by Location
- Event Count by Medication Type
- Event Listing By Group
- Event Listing by Individual
- Top 5 Listing

Event Trends

Annual Comparison: This report displays the amount of events for each category and type, as well as the percentage of how much of the total number of events it holds. The data is then compared to data from the same period of the previous year and calculates the percentage of change between the two



Event
Trends

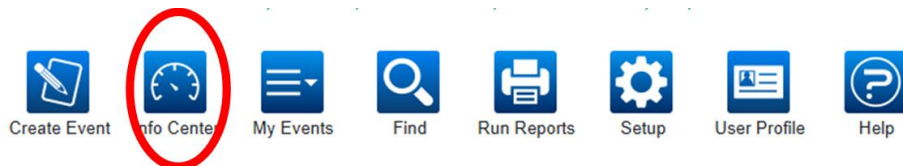
Event_Trends Click on a Report to Select.

- Annual Comparison
- Annual Trend of Event Types
- Long Term Trend

Annual trend of Event Types: Displays the counts for each event type sorted by month. The total number of event for the category will be seen at the bottom of the chart while the total number of events for the event type will be listed in the last column

6. Information Center

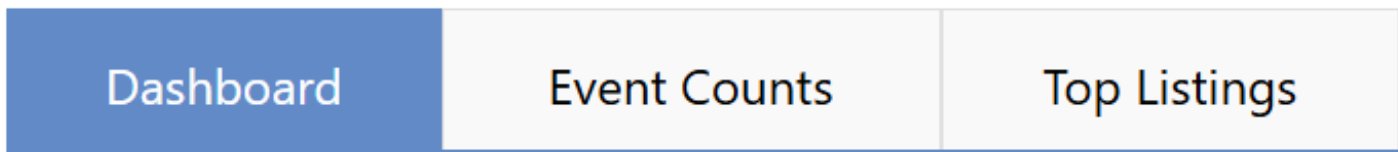
**To find department statistics of patient safety reports*



Use the top bar to filter your results by Facility, Department and Date:

Facility/Program: Test Site for New Users
Department: All Departments
Date Range: Last Year
Refresh
Include Sub Departments
01-Jan-2023 to 31-Dec-2023
Filters
Include Sub Facilities/Programs

After filtering, you can access the following tabs:



- Total Events
- Open Events
- Actual versus Near Miss
- Count by Severity
- Count by Location

Open versus Closed:

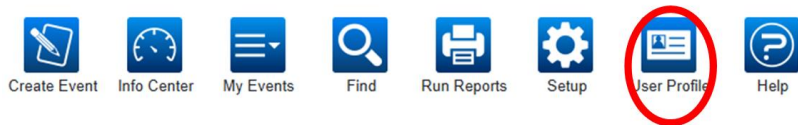
- Total
- Responsible for
- Notified About
- Unresolved Events

Events Awaiting Responses

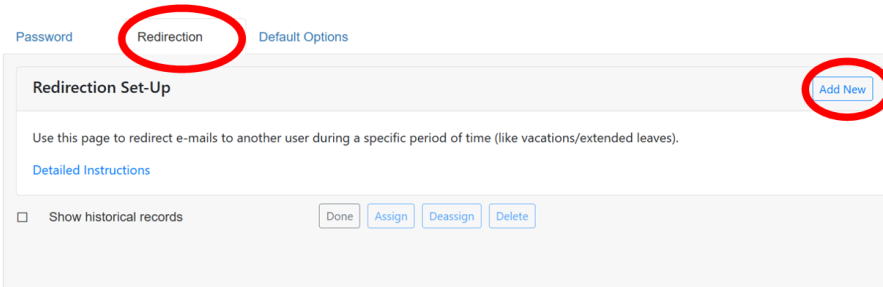
Describes the most frequent events by department, event type, severity, etc.

6. Forward Notifications (For Manager Absence)

Select User Profile



Under the 'Redirection' Tab, select "Add New"



Fill out the time period, then select "assign" to find the covering manager. Search for their name in the pop up, click select, and click done.

To deassign, select the record you wish to remove and push "Deassign" on the bottom.