

How to Do an Incident Report in PointClickCare

Documenting an incident thoroughly and accurately is an essential part of resident care. This guide walks you through how to do an incident report in PointClickCare, from creating the initial record through to completing injury details, documenting contributing factors, recording witness statements, triggering the Morse Fall Scale form, and collecting the required signatures. The steps below use an example incident — a witnessed fall involving resident James Anderson — to illustrate each stage of the process.

Prerequisites

- Access to the **Care Services** module in PointClickCare.
- Appropriate security permissions to create, sign, and, if needed, lock incident reports.
- Knowledge of the resident's details and the circumstances of the incident being reported.

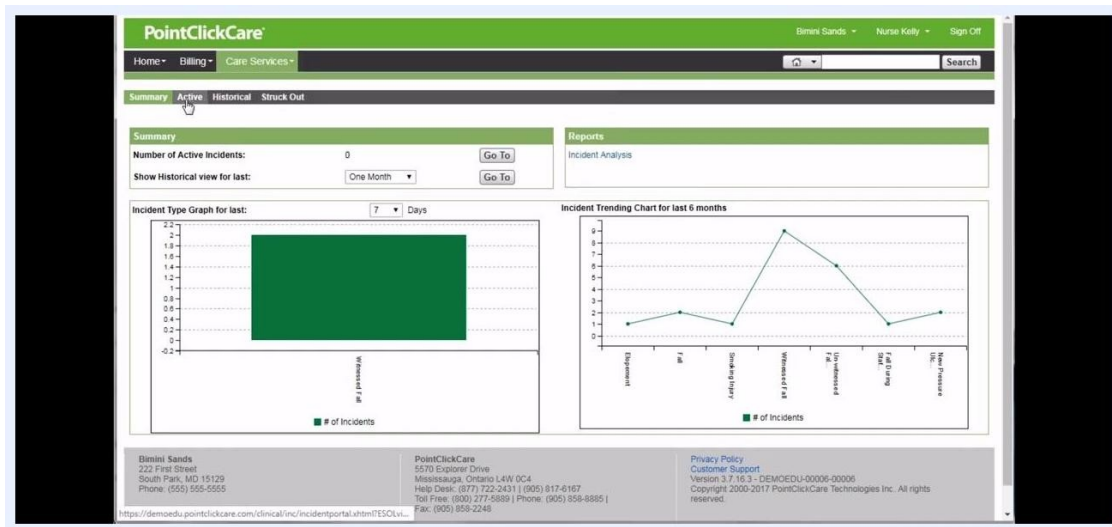
Starting a new incident report

1. Open the Incidents section

Navigate to the **Care Services** module and select the **Incidents** section.

2. Confirm you are in the Active view

Make sure you are on the **Active** tab, located at the top of the Incidents section. This view displays incident graphs and summary information for the community.



The PointClickCare dashboard showing the Care Services > Incidents section with the Active tab highlighted. The screen displays incident graphs and summary information.

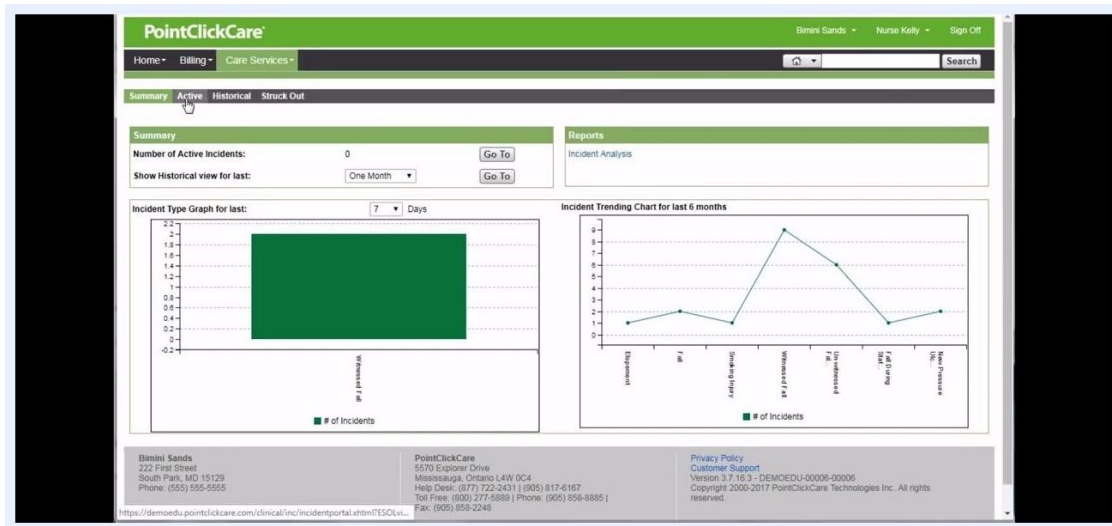
3. Create a new incident

Click the **New** button to create a new incident report.

Documenting incident details

4. Enter the Nursing Description

After clicking New, you are taken to the **Details** section of the incident report, where you'll see fields for Incident Description and Immediate Action Taken.



Incident Details screen for a new incident report, with fields for Nursing Description, Resident Description, Resident Unable to Give Description checkbox, Description of Action Taken, and Resident Taken to Hospital checkbox. Resident: Anderson, James. Type/Nature of Incident: Witnessed Fall. Date of Incident: 9/27/2018 10:09.

Enter the **Nursing Description** of the incident. For example:



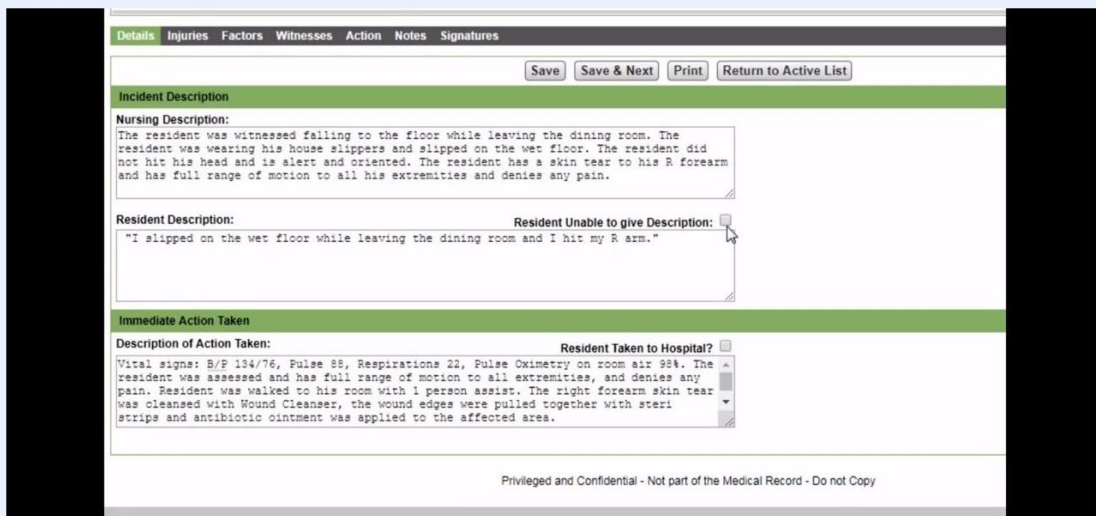
"The resident was witnessed falling to the floor while leaving the dining room. The resident was wearing his house slippers and slipped on the wet floor. The resident did not hit his head and is alert and oriented. The resident has a skin tear to his R forearm and has full range of motion to all his extremities and denies any pain."

5. Record the resident's statement

Obtain and enter the resident's own account of the incident in the **Resident Description** field. If the resident is unable to describe what happened, select the **Resident Unable to give Description** checkbox instead.

In this example, Mr. Anderson is able to describe the incident, so the following is entered:

 "I slipped on the wet floor while leaving the dining room and I hit my R arm."



Details Injuries Factors Witnesses Action Notes Signatures

Save Save & Next Print Return to Active List

Incident Description

Nursing Description:
The resident was witnessed falling to the floor while leaving the dining room. The resident was wearing his house slippers and slipped on the wet floor. The resident did not hit his head and is alert and oriented. The resident has a skin tear to his R forearm and has full range of motion to all his extremities and denies any pain.

Resident Description: "I slipped on the wet floor while leaving the dining room and I hit my R arm."

Resident Unable to give Description:

Immediate Action Taken

Description of Action Taken:
Vital signs: B/P 134/76, Pulse 88, Respirations 22, Pulse Oximetry on room air 98%. The resident was assessed and has full range of motion to all extremities, and denies any pain. Resident was walked to his room with 1 person assist. The right forearm skin tear was cleansed with Wound Cleanser, the wound edges were pulled together with steri strips and antibiotic ointment was applied to the affected area.

Resident Taken to Hospital?

Privileged and Confidential - Not part of the Medical Record - Do not Copy

Incident Details screen with Nursing Description and Resident Description fields filled in. Nursing Description details the witnessed fall, and Resident Description contains the resident's statement.

6. Document the action taken

In the **Description of Action Taken** field, record the clinical response to the incident. For example:

 "Vital signs: B/P 134/76, Pulse 88, Respirations 22, Pulse Oximetry on room air 98%. The resident was assessed and has full range of motion to all extremities, and denies any pain. Resident was walked to his room with 1 person assist. The right forearm skin tear was cleansed with Wound Cleanser, the wound edges were pulled together with steri strips and antibiotic ointment was applied to the affected area."

Details	Injuries	Factors	Witnesses	Action	Notes	Signatures
Save Save & Next Print Return to Active List						
Incident Description						
Nursing Description: The resident was witnessed falling to the floor while leaving the dining room. The resident was wearing his house slippers and slipped on the wet floor. The resident did not hit his head and is alert and oriented. The resident has a skin tear to his R forearm and has full range of motion to all his extremities and denies any pain.						
Resident Description: "I slipped on the wet floor while leaving the dining room and I hit my R arm." Resident Unable to give Description: ☐						
Immediate Action Taken						
Description of Action Taken: Vital signs: B/P 134/76, Pulse 88, Respirations 22, Pulse Oximetry on room air 98%. The resident was assessed and has full range of motion to all extremities, and denies any pain. Resident was walked to his room with 1 person assist. The right forearm skin tear was cleansed with Wound Cleanser, the wound edges were pulled together with steri strips and antibiotic ointment was applied to the affected area. Resident Taken to Hospital? ☐						
Privileged and Confidential - Not part of the Medical Record - Do not Copy						

Incident Details screen with all fields completed, including detailed action taken and the resident's statement.

7. Indicate whether the resident was hospitalized

If the resident was taken to the hospital, select the **Resident Taken to Hospital?** checkbox. This enables additional hospital information fields for reporting purposes. In this example, the box remains unchecked since Mr. Anderson was not taken to the hospital.

Recording injuries and pain assessment

8. Save and move to the Injuries section

Once you have completed the Immediate Action Taken section, click **Save & Next** at the top of the screen to advance.

The screenshot shows a web application interface for recording incident details. At the top, there is a navigation bar with tabs: Details, Injuries, Factors, Witnesses, Action, Notes, and Signatures. Below the navigation bar, there are four buttons: Save, Save & Next, Print, and Return to Active List. The 'Save & Next' button is highlighted. The main content area is divided into three sections: Incident Description, Resident Description, and Immediate Action Taken. The Incident Description section contains a text area with the following text: 'The resident was witnessed falling to the floor while leaving the dining room. The resident was wearing his house slippers and slipped on the wet floor. The resident did not hit his head and is alert and oriented. The resident has a skin tear to his R forearm and has full range of motion to all his extremities and denies any pain.' The Resident Description section contains a text area with the following text: 'I slipped on the wet floor while leaving the dining room and I hit my R arm.' The Immediate Action Taken section contains a text area with the following text: 'Vital signs: B/P 134/76, Pulse 88, Respirations 22, Pulse Oximetry on room air 98%. The resident was assessed and has full range of motion to all extremities, and denies any pain. Resident was walked to his room with 1 person assist. The right forearm skin tear was cleansed with Wound Cleanser, the wound edges were pulled together with steri strips and antibiotic ointment was applied to the affected area.' At the bottom of the screen, there is a footer that reads: 'Privileged and Confidential - Not part of the Medical Record - Do not Copy'.

Incident Details screen with the **Save & Next** button highlighted, ready to proceed to the Injuries section.

The **Injuries** tab opens, displaying "Injuries Observed At Time Of Incident." If no injuries are listed yet, click **New** to add one.

9. Add injury details

In the **New Injury at Time of Incident** popup:

- Set **Type of Injury** to [Skin Tear](#).
- Set **Location of Injury** to [60\) Right Forearm](#).

Click **Save** to add the injury.

The screenshot shows the PointClickCare interface for Incident # 40, Client: Anderson, James (1). The 'Injuries' tab is selected, and the 'Injuries Observed At Time Of Incident' section is active. The 'Save' button is highlighted. The form includes fields for Type of Injury, Location of Injury, Level of Pain (Date, Numerical Scale, PAINAD Scale), Level of Consciousness, Mobility, and Mental Status.

Popup window for adding a new injury, with Type of Injury set to Skin Tear and Location of Injury set to 60) Right Forearm.

10. Document the pain level

In the **Level of Pain** section:

- Set the **Date** to [9/27/2018](#).
- Select the **Numerical Scale**.
- Rate the pain level as [2](#) by clicking the corresponding button on the scale.

This pain value will also appear in the Weights and Vitals tabs of the resident's chart.

11. Record consciousness, mobility, and mental status

Complete the remaining assessment fields:

- Set **Level of Consciousness** to [Alert](#).
- Set **Mobility** to [Ambulatory with assistance](#).

- Under **Mental Status**, check all that apply: Oriented to Person, Oriented to Place, Oriented to Time, and Oriented to Situation.

The screenshot displays the PointClickCare interface for a patient named Anderson, James (1). The incident is a 'Witnessed Fall' occurring on 9/27/2018 at 10:09. The injury is a 'Skin Tear' located on the '60) Right Forearm'. The pain level is recorded as '2' on a scale of 0-10. The patient's level of consciousness is 'Alert', and their mobility is 'Ambulatory with assistance'. Under the 'Mental Status' section, all four checkboxes are checked: 'Oriented to Person', 'Oriented to Place', 'Oriented to Time', and 'Oriented to Situation'. The 'Injuries Observed At Time Of Incident' section is currently empty, with a 'New' button available to add more injuries.

Injuries section completed with Skin Tear on Right Forearm, Pain Level 2, Alert consciousness, Ambulatory with assistance, and all orientation boxes checked.

If your community is configured for post-incident injury reporting, you can also enter injuries discovered after the initial incident, such as bruising found days later. In this example, there are no post-incident injuries, so this section is left blank.

Documenting contributing factors

12. Record predisposing factors

Click **Save & Next** to move to the **Factors** tab. This section lets you document environmental, physiological, and situational factors that may have contributed to the incident.

The screenshot shows the PointClickCare interface for incident # 40, Client: Anderson, James (1). The 'Factors' tab is active, displaying three main sections for predisposing factors:

- Predisposing Environmental:** Includes checkboxes for Poor Lighting, Crowding, Noise, Clutter, Wet Floor, Rugs/Carpeting, Furniture, Pets, Fall Alarm, Other (Describe), and None.
- Predisposing Physiological:** Includes checkboxes for Recent Illness, Recent change in Cognition, Recent change in Medications/New Medications, Gait Imbalance, Drowsy, Impaired Memory, Confused, Sedated, Incontinent, Weakness/Fatigue, Hypotensive, Current UTI, and Other (Describe).
- Predisposing Situation:** Includes checkboxes for Recent Room Change, Admitted within Last 72h, Dislikes Roommate, Large Groups, Side Rails Up, Restrained, During Transfer, Wanderer, Active Exit Seeker, Using Walker, Using Cane, Using Wheeled Walker, Ambulating with Assist, Ambulating without Assist, Improper Footwear, and Other (Describe).

At the bottom, there is an 'Other Information' field.

Factors section with checkboxes for environmental, physiological, and situational factors such as Wet Floor, Gait Imbalance, and Improper Footwear.

In this example:

- Under **Predisposing Environmental**, check [Wet Floor](#).
- Under **Predisposing Situation**, check [Improper Footwear](#).
- In the **Other Information** field, enter: [Resident was wearing house slippers at the time of the fall.](#)

Click **Save & Next** to proceed to the Witnesses section.

PointClickCare

Home Billing Care Services Search

Incident #: 40 Client: Anderson, James (1) Type/Nature of Incident: Witnessed Fall Date of Incident: 9/27/2018 10:09

Details Injuries **Factors** Witnesses Action Notes Signatures

Save Save & Next Print Return to Active List

Predisposing Environmental

☐ Poor Lighting ☐ Crowding ☐ Noise ☐ Clutter

☒ Wet Floor ☐ Rugs/Carpeting ☐ Furniture ☐ Pets

☐ Fall Alarm ☐ Other (Describe) ☐ None

Predisposing Physiological

☐ Recent Illness ☐ Recent change in Cognition ☐ Recent change in Medications/New Medications ☐ Gait Imbalance

☐ Drowsy ☐ Impaired Memory ☐ Confused ☐ Sedated

☐ Incontinent ☐ Weakness/Fatigue ☐ Hypotensive ☐ Current UTI

☐ Other (Describe) ☐ None

Predisposing Situation

☐ Recent Room Change ☐ Admitted within Last 72h ☐ Dislikes Roommate ☐ Large Groups

☐ Side Rails Up ☐ Restrained ☐ During Transfer ☐ Wanderer

☐ Active Exit Seeker ☐ Using Walker ☐ Using Cane ☐ Using Wheeled Walker

☐ Ambulating with Assist ☐ Ambulating without Assist ☒ Improper Footwear ☐ Other (Describe)

☐ Other (Describe) ☐ None

Other Information

Resident was wearing house slippers at the time of the fall.

Factors tab with **Wet Floor** and **Improper Footwear** checked, and the note about house slippers entered in **Other Information**.

Adding witness information

13. Add a witness

In the **Witnesses** tab, check the box for **Was this incident witnessed?**, then click **New** to add a witness.

PointClickCare

Home Billing Care Services Search

Incident #: 40 Client: Anderson, James (1) Type/Nature of Incident: Witnessed Fall Date of Incident: 9/27/2018 10:09

Details Injuries Factors **Witnesses** Action Notes Signatures

Save Save & Next Print Return to Active List

Predisposing Environmental

☐ Poor Lighting ☐ Crowding ☐ Noise ☐ Clutter

☒ Wet Floor ☐ Rugs/Carpeting ☐ Furniture ☐ Pets

☐ Fall Alarm ☐ Other (Describe) ☐ None

Predisposing Physiological

☐ Recent Illness ☐ Recent change in Cognition ☐ Recent change in Medications/New Medications ☐ Gait Imbalance

☐ Drowsy ☐ Impaired Memory ☐ Confused ☐ Sedated

☐ Incontinent ☐ Weakness/Fatigue ☐ Hypotensive ☐ Current UTI

☐ Other (Describe) ☐ None

Predisposing Situation

☐ Recent Room Change ☐ Admitted within Last 72h ☐ Dislikes Roommate ☐ Large Groups

☐ Side Rails Up ☐ Restrained ☐ During Transfer ☐ Wanderer

☐ Active Exit Seeker ☐ Using Walker ☐ Using Cane ☐ Using Wheeled Walker

☐ Ambulating with Assist ☐ Ambulating without Assist ☐ Improper Footwear ☐ Other (Describe)

☐ Other (Describe) ☐ None

Other Information

Witnesses tab with the "Was this incident witnessed?" checkbox and New button, with no witnesses listed yet.

In the **Incident Witness** popup, enter the witness details:

Generated with docsie.io

- Set **Relation** to [Staff](#).
- Enter **Name**: [Angela](#).
- Set **Position** as appropriate (for example, [Registered Nurse](#)).
- Set **Date** to [9/27/2018](#).
- In **Who took statement**, enter [Nurse Kelly](#).
- In **Statement**, enter Angela's account of the incident.
- Enter any available phone numbers if required.

Click **Save** to add the witness.

The screenshot shows the PointClickCare interface for an incident witness form. The top navigation bar includes 'Home', 'Billing', and 'Care Services'. The incident details section shows 'Incident #: 40' and 'Client: Anderson, James (1)'. The 'Witnesses' tab is selected, displaying a form with sections for 'Predisposing Environmental', 'Predisposing Physiological', and 'Predisposing Situation'. Each section contains a grid of checkboxes for various factors. The 'Other Information' section at the bottom has a text field with the entry: 'Resident was wearing house slippers at the time of the fall.'

Incident Witness popup with fields for Relation, Name, Position, Date, Who took statement, Statement, and phone numbers.

Recording notifications and progress notes

14. Notify and document relevant parties

Go to the **Action** tab to record notifications, progress notes, and triggered forms. Under **Agencies / People Notified**, click **New**.

In the popup:

- Set **Agency / Person** to [Physician](#).
- Enter **Name**: [Brindan](#), [Adam](#).
- Set **Date** to [9/27/2018](#) and **Time** to [10:24](#).

Click **Save**.

The screenshot shows the PointClickCare web application. A popup window titled "Agency / Person Notified" is open over the "Incident" section. The popup contains the following fields and options:

- Agency / Person:** A dropdown menu with "Physician" selected.
- Name:** A text field containing "Brindan, Adam".
- Date:** A date picker set to "9/27/2018".
- Time:** A time picker set to "10:24".
- Buttons:** "Save", "Save & New", and "Close".

The background interface shows the "Incident" details for "Anderson, James (1)" with a "Type/Nature of Incident" of "Witnessed Fall". The "Progress Notes" section is visible with a "New" button.

Agency/Person Notified popup with **Physician, Brindan Adam**, and **date/time** fields filled in, with the **Save** button highlighted.

Under **Progress Notes**, click **New**. In the **New Progress Note** popup:

- Select the appropriate **Type** (for example, **Incident Note**).
- Set **Effective Date** to **9/27/2018** and **Time** to **10:25**.
- Enter the progress note details about the incident.
- Check any relevant boxes, such as **Show on Shift Report** or **Show on 24 Hour Report**.
- Click **Sign** and follow the prompt to sign the note.

The screenshot shows the PointClickCare web application with the "New Progress Note" popup open. The popup contains the following fields and options:

- Type:** A dropdown menu with "SELECT APPROPRIATE TYPE" selected.
- Effective Date:** A date picker set to "9/27/2018".
- Time:** A time picker set to "10:25".
- Text:** A text area with the placeholder "Text cannot be entered. The selected template has no sections."
- Options:** Checkboxes for "Show on Shift Report", "Show on 24 Hour Report", "Show on MD/Nursing Communications Report", and "Edit Service Plan Immediately".
- Position:** A text field containing "Director of Nursing".
- Created By:** A text field containing "Nurse Kelly".
- Created Date:** A text field containing "9/27/2018 10:25:01".
- Buttons:** "Sign", "Sign & New", and "Cancel".

The background interface shows the "Progress Notes" section with a "New" button highlighted.

New Progress Note popup with fields for **Type** and **Effective Date**, and options for **shift/24-hour report**, ready for signing.

After saving and signing, verify the progress note appears correctly, showing:

- **Effective Date:** 9/27/2018 10:25
- **Type:** Incident Note
- **Note:** a summary of the incident
- **Author:** Nurse Kelly

The screenshot displays the PointClickCare web application interface. At the top, the header shows 'PointClickCare' and user information: 'Blair Sands', 'Nurse Kelly', and a 'Sign Off' button. The main navigation bar includes 'Home', 'Billing', 'Care Services', and a search bar. The central area shows details for 'Incident #: 40' and 'Client: Anderson, James (1)'. The 'Type/Nature of Incident' is 'Witnessed Fall' and the 'Date of Incident' is '9/27/2018 10:09'. The 'Action' tab is selected, showing a table for 'Agencies / People Notified' with columns for 'Agency / Person' and 'Date'. Below this is the 'Progress Notes' section with a 'New' button and a table for 'Effective Date'. The 'Triggered Forms' section shows a table with columns for 'Date' and 'Status'. The 'Service Plan' section includes checkboxes for 'Service Plan Reviewed', 'Unusual Occurrence Report', and 'Care Conference Required'. A modal window titled 'Risk Management - Google Chrome' is open, displaying a form for adding a notification to a physician. The form includes a dropdown for 'Agency / Person' (set to 'Physician'), a text field for 'Name' (filled with 'Brindan, Adam'), a date field (set to '9/27/2018'), and buttons for 'Save', 'Save & New', and 'Close'. The footer contains contact information for Blair Sands, PointClickCare, and a privacy policy link.

Action tab showing the completed notification to the Physician, the progress note entry, and the triggered forms section.

Triggering and completing the Morse Fall Scale

15. Trigger the Morse Fall Scale form

Navigate to the **Action** tab of the incident report, confirming you are on the correct incident by checking the Incident # and Client name at the top. Review the Agencies / People Notified and Progress Notes sections for accuracy.

Under **Triggered Forms**, locate the **MORSE FALL SCALE** entry. If the form has not yet been created, click the **new** link to begin.

The screenshot shows a web application interface. In the foreground, a modal dialog box titled "Reasons for Form" is open. It contains the following fields and information:

- Form Date:** 09/27/2018
- Time:** 10:09
- Form:** MORSE FALL SCALE
- Type of Form:** Admission
- Existing Schedules For This Resident & Assessment Type:**
Check all schedules to be cleared/updated upon completion of this assessment.

Schedule	Due	Desc	Checked
MORSE FALL SCALE	9/28/2018	fall	☒

At the bottom of the dialog are "Save" and "Cancel" buttons. The background shows a table with columns: Incident #, Incident Name, Type/Nature of Incident, Date of Incident, Status, Author, and Nurse K. The "Action" tab is selected, and a "New" link is visible under the "Triggered Forms" section.

Action tab with the new link under Triggered Forms for Morse Fall Scale, cursor pointing to new, showing incident details and notification sections.

When prompted, fill out the **Reasons for Form** dialog:

- Set the **Form Date** to 09/27/2018 and **Time** to 10:09.
- Ensure the **Form** field is set to MORSE FALL SCALE.
- In the **Type of Form** dropdown, select the appropriate type (for example, Post Fall).
- Review the Existing Schedules For This Resident & Assessment Type and ensure the relevant schedule (MORSE FALL SCALE, Due: 9/28/2018, Desc: fall) is checked.

Click **Save** to create the form with the specified date and time.

PointClickCare

Home Billing Care Services Search

Anderson, James (1)
 Status: Current Location: North 100-1
 Gender: Male DOB: 2/20/1930
 Physician: John Ullman

Current Vitals
 BP: 130/75 mmHg Temp: 98.6 °F Pulse: 90 bpm
 6/21/2018 09:23 3/1/2018 10:09 4/23/2018 12:54
 Resp: 20 Breaths/min BS: 73 mg/dL O2: 98 %
 3/1/2018 10:09 8/5/2018 16:12 3/1/2018 10:09

Allergies: Morphine, Red Dye, Shellfish-derived Products
 Code Status: DO NOT HOSPITALIZE (DNH)

Next Form Due:

View All	Date	Description	Status	Type	Category	Score	Created By	Revised By
view unlock copy print strike-out	9/27/2018	MORSE FALL SCALE	Complete	Post Fall	High Risk for Falling	65.0	2.0testnurse	2.0testnurse
view unlock copy print strike-out	9/20/2018	MORSE FALL SCALE	Complete	Post Fall	High Risk for Falling	65.0	2.0testnurse	2.0testnurse
print	9/20/2018	MORSE FALL SCALE	Incomplete		Incorrect Documentation		2.0testnurse	2.0testnurse
print	8/26/2018	MORSE FALL SCALE	Incomplete		Incorrect Documentation		pcc-shipli	pcc-shipli
copy print	8/24/2018	MORSE FALL SCALE	Incomplete	Post Fall			2.0testnurse	2.0testnurse
view unlock copy print strike-out	8/3/2018	MORSE FALL SCALE	Complete	Post Fall	Moderate Risk for Falling	40.0	pcc-shipli	pcc-shipli
view unlock copy print strike-out	7/26/2018	MORSE FALL SCALE	Complete	Post Fall	High Risk for Falling	95.0	pcc-shipli	pcc-shipli
view unlock copy print strike-out	4/23/2018	Move In Form V3	Complete	Move In			pcc-shipli	pcc-shipli
view unlock copy print strike-out	4/10/2018	Assessment - Symbols and Question Types - V 2	Complete	Admission			2.0testnurse	2.0testnurse
edit del close print	4/10/2018	BRADEN SCALE FOR PREDICTING PRESSURE SORE RISK - Senior Living	In Progress	Admission		TBD	2.0testnurse	2.0testnurse
edit del close print	4/10/2018	Fall Risk Form	In Progress	Admission			2.0testnurse	2.0testnurse
view print strike-out	3/1/2018	Move In	Complete	Move In			2.0testnurse	2.0testnurse
view unlock copy print strike-out	3/1/2018	ACTIVITIES - INITIAL REVIEW	Complete	Re-Admission			2.0testnurse	2.0testnurse
edit del close lock print	11/2/2017	Move In Form - V 1	In Progress	Move In		0.0	pcc-balders	2.0testnurse
print	7/26/2017	606-4061	Incomplete	Wrong Chart			pcc-dortc	pcc-dortc

Reasons for Form dialog with Form Date 09/27/2018, Time 10:09, Form set to Morse Fall Scale, and Type of Form set to Post Fall.

16. Complete the Morse Fall Scale form

Fill in all required fields:

- **History of Falling:** select 1 (No) or 2 (Yes).
- **Secondary Diagnosis:** select 1 (No) or 2 (Yes).
- **Ambulatory Aid:** choose the appropriate option (None/bedrest/wheelchair/nurse assist, Uses crutches/cane/walker, or Uses furniture for support).
- **IV or IV Access:** select 1 (No) or 2 (Yes).
- **Gait:** select the appropriate description (Impaired or Weak).

Use **Save & Sign**, **Save**, **Save & Exit**, or **Save & Sign & Lock & Exit** as appropriate, and follow any prompts to complete, sign, and lock the form.

PointClickCare Elmeri Sands - Nurse Kelly - Sign Off

Home - Billing - Care Services - Search

Anderson, James (1)
 Status: Current Location: North 100-1
 Gender: Male DOB: 2/20/1930
 Physician: John Ullman
 Edit Print

Current Vitals
 BP: 130/75 mmHg Temp: 98.6 °F Pulse: 90 bpm
 9/21/2018 09:23 9/21/2018 10:08 9/21/2018 12:54
 Resp: 20 Breaths/min O2: 73 mg/dL CO2: 38 %
 9/21/2018 10:09 9/21/2018 10:10 9/21/2018 10:08

Allergies: Morphine, Red Dye, Shellfish-derived Products
 Code Status: DO NOT HOSPITALIZE (DNH)

Dash Profile Census Med Diag Allergy Immun Orders Wts/Vitals Results Forms Prog Note Service Plan Tasks Documents

Standard Forms New Edit Schedules Type: All

Next Form Due:

View All	Date	Description	Status	Type	Category	Score	Created By	Revised By
view unlock copy print strike-out	9/27/2018	MORSE FALL SCALE	Complete	Post Fall	High Risk for Falling	65.0	2.0esthurse	2.0esthurse
view unlock copy print strike-out	9/20/2018	MORSE FALL SCALE	Complete	Post Fall	High Risk for Falling	65.0	2.0esthurse	2.0esthurse
print	9/20/2018	MORSE FALL SCALE	Incomplete	Incorrect Documentation			2.0esthurse	2.0esthurse
print	9/26/2018	MORSE FALL SCALE	Incomplete	Incorrect Documentation			pcc-shipk	pcc-shipk
copy print	9/24/2018	MORSE FALL SCALE	Incomplete	Post Fall		2.0esthurse	2.0esthurse	
view unlock copy print strike-out	8/3/2018	MORSE FALL SCALE	Complete	Post Fall	Moderate Risk for Falling	40.0	pcc-shipk	pcc-shipk
view unlock copy print strike-out	7/26/2018	MORSE FALL SCALE	Complete	Post Fall	High Risk for Falling	95.0	pcc-shipk	pcc-shipk
view unlock copy print strike-out	4/23/2018	Move in Form V3	Complete	Move In			pcc-shipk	pcc-shipk
view unlock copy print strike-out	4/10/2018	Assessment - Symbols and Question Types - V 2	Complete	Admission			2.0esthurse	2.0esthurse
edit del close print	4/10/2018	BRADEN SCALE FOR PREDICTING PRESSURE SORE RISK - Senior Living	In Progress	Admission		TBD	2.0esthurse	2.0esthurse
edit del close print	4/10/2018	Fall Risk Form	In Progress	Admission			2.0esthurse	2.0esthurse
view print strike-out	3/1/2018	Move in	Complete	Move In			2.0esthurse	2.0esthurse
view unlock copy print strike-out	3/1/2018	ACTIVITIES - INITIAL REVIEW	Complete	Re-Admission			2.0esthurse	2.0esthurse
edit del close lock print	11/2/2017	Move in Form - V 1	In Progress	Move In		0.0	pcc-baldes	2.0esthurse
print	7/28/2017	diat-test	Incomplete	Wrong Chart			pcc-dortc	pcc-dortc

ovascryptcheckForLockPriorToView/https://demoedu.pointclickcare.com/care/chart/ndu/ndusection.jsp?ESOLLastesid=9654&retURL=/admin/client/cp_assessment.jsp&ESOLtabType=C_96547

Morse Fall Scale form with fields for History of Falling, Secondary Diagnosis, Ambulatory Aid, IV Access, and Gait, with action buttons at the top.

17. Review the completed form

Go to the **Forms** tab in the resident's chart and locate the most recent **MORSE FALL SCALE** entry (for example, 9/27/2018, Status: Complete, Type: Post Fall, Category: High Risk for Falling, Score: 65.0). Use the **view** link to open and review the form.

With appropriate security permissions, you can also use the **go to Incident** link within the form to return directly to the incident report.

PointClickCare | Elmer Sands | Nurse Kelly | Sign Off

Home | Billing | Care Services | Search

Anderson, James (1)
Status: Current | Location: North 100-1
Gender: Male | DOB: 2/20/1930
Physician: John Ullman

Current Vitals
BP: 130/75 mmHg | Temp: 98.6 °F | Pulse: 90 bpm
6/21/2018 09:23 | 3/1/2018 10:09 | 4/23/2018 12:54
Resp: 20 Breaths/min | BS: 73 mg/dL | O2: 98 %
3/1/2018 10:09 | 6/6/2018 16:10 | 3/1/2018 10:09

Allergies: Morphine, Red Dye, Shellfish-derived Products
Code Status: DO NOT HOSPITALIZE (DNH)

Dash | Profile | Census | Med Diag | Allergy | Immun | Orders | Wts/Vitals | Results | **Forms** | Prog Note | Service Plan | Tasks | Documents

Standard Forms | New | Edit Schedules | Type: All

Next Form Due:

View All	Date	Description	Status	Type	Category	Score	Created By	Revised By
view unlock copy print strike-out	9/27/2018	MORSE FALL SCALE	Complete	Post Fall	High Risk for Falling	65.0	2.0esthurse	2.0esthurse
view unlock copy print strike-out	9/20/2018	MORSE FALL SCALE	Complete	Post Fall	High Risk for Falling	65.0	2.0esthurse	2.0esthurse
view unlock copy print strike-out	9/20/2018	MORSE FALL SCALE	Incomplete	Incorrect Documentation			2.0esthurse	2.0esthurse
view unlock copy print strike-out	8/24/2018	MORSE FALL SCALE	Incomplete	Post Fall			2.0esthurse	2.0esthurse
view unlock copy print strike-out	8/3/2018	MORSE FALL SCALE	Complete	Post Fall	Moderate Risk for Falling	40.0	pcc-shipk	pcc-shipk
view unlock copy print strike-out	7/26/2018	MORSE FALL SCALE	Complete	Post Fall	High Risk for Falling	95.0	pcc-shipk	pcc-shipk
view unlock copy print strike-out	4/23/2018	Move In Form V3	Complete	Move In			pcc-shipk	pcc-shipk
view unlock copy print strike-out	4/10/2018	Assessment - Symbols and Question Types - V 2	Complete	Admission			2.0esthurse	2.0esthurse
edit del close print	4/10/2018	BRADEN SCALE FOR PREDICTING PRESSURE SORE RISK - Senior Living	In Progress	Admission	TBD		2.0esthurse	2.0esthurse
edit del close print	4/10/2018	Fall Risk Form	In Progress	Admission			2.0esthurse	2.0esthurse
view print strike-out	3/1/2018	Move In	Complete	Move In			2.0esthurse	2.0esthurse
view unlock copy print strike-out	3/1/2018	ACTIVITIES - INITIAL REVIEW	Complete	Re-Admission			2.0esthurse	2.0esthurse
edit del close lock print	11/2/2017	Move In Form - V 1	In Progress	Move In		0.0	pcc-daides	2.0esthurse
view print	7/26/2017	diat-test	Incomplete	Wrong Chart			pcc-dortc	pcc-dortc

Resident chart Forms tab showing a list of completed forms, including multiple Morse Fall Scale entries with view, unlock, copy, and print options.

18. Return to the incident from the form

In the Morse Fall Scale form, click the **go to Incident** link next to the triggering event to navigate back to the incident report.

PointClickCare | Elmer Sands | Nurse Kelly | Sign Off

Home | Billing | Care Services | Search

Anderson, James (1)
Status: Current | Location: North 100-1
Gender: Male | DOB: 2/20/1930
Physician: John Ullman

Current Vitals
BP: 130/75 mmHg | Temp: 98.6 °F | Pulse: 90 bpm
6/21/2018 09:23 | 3/1/2018 10:09 | 4/23/2018 12:54
Resp: 20 Breaths/min | BS: 73 mg/dL | O2: 98 %
3/1/2018 10:09 | 6/6/2018 16:10 | 3/1/2018 10:09

Allergies: Morphine, Red Dye, Shellfish-derived Products
Code Status: DO NOT HOSPITALIZE (DNH)

Dash | Profile | Census | Med Diag | Allergy | Immun | Orders | Wts/Vitals | Results | **Forms** | Prog Note | Service Plan | Tasks | Documents

Standard Forms | New | Edit Schedules | Type: All

Next Form Due:

View All	Date	Description	Status	Type	Category	Score	Created By	Revised By
view unlock copy print strike-out	9/27/2018	MORSE FALL SCALE	Complete	Post Fall	High Risk for Falling	65.0	2.0esthurse	2.0esthurse
view unlock copy print strike-out	9/20/2018	MORSE FALL SCALE	Complete	Post Fall	High Risk for Falling	65.0	2.0esthurse	2.0esthurse
view unlock copy print strike-out	9/20/2018	MORSE FALL SCALE	Incomplete	Incorrect Documentation			2.0esthurse	2.0esthurse
view unlock copy print strike-out	8/24/2018	MORSE FALL SCALE	Incomplete	Post Fall			2.0esthurse	2.0esthurse
view unlock copy print strike-out	8/3/2018	MORSE FALL SCALE	Complete	Post Fall	Moderate Risk for Falling	40.0	pcc-shipk	pcc-shipk
view unlock copy print strike-out	7/26/2018	MORSE FALL SCALE	Complete	Post Fall	High Risk for Falling	95.0	pcc-shipk	pcc-shipk
view unlock copy print strike-out	4/23/2018	Move In Form V3	Complete	Move In			pcc-shipk	pcc-shipk
view unlock copy print strike-out	4/10/2018	Assessment - Symbols and Question Types - V 2	Complete	Admission			2.0esthurse	2.0esthurse
edit del close print	4/10/2018	BRADEN SCALE FOR PREDICTING PRESSURE SORE RISK - Senior Living	In Progress	Admission	TBD		2.0esthurse	2.0esthurse
edit del close print	4/10/2018	Fall Risk Form	In Progress	Admission			2.0esthurse	2.0esthurse
view print strike-out	3/1/2018	Move In	Complete	Move In			2.0esthurse	2.0esthurse
view unlock copy print strike-out	3/1/2018	ACTIVITIES - INITIAL REVIEW	Complete	Re-Admission			2.0esthurse	2.0esthurse
edit del close lock print	11/2/2017	Move In Form - V 1	In Progress	Move In		0.0	pcc-daides	2.0esthurse
view print	7/26/2017	diat-test	Incomplete	Wrong Chart			pcc-dortc	pcc-dortc

Completed Morse Fall Scale form with the go to Incident link highlighted, showing score, category, and triggering event.

19. Confirm the triggered form status

Back in the **Action** tab, verify that the Triggered Forms section now shows the completed Morse Fall Scale form with the correct date and a status of **Complete**. You can use the **view** or **print** links to access or print the completed form.

The screenshot shows the PointClickCare interface for Incident # 40, Client: Anderson, James (1). The 'Action' tab is selected, displaying a table of triggered forms. The table has columns for Date, Description, and Status. A single entry is shown for 9/27/2018, MORSE FALL SCALE, with a status of Complete. Below the table, there are checkboxes for 'Service Plan Reviewed', 'Unusual Occurrence Report', and 'Care Conference Required'. The footer contains contact information for Bimini Sands and PointClickCare, along with a privacy policy link.

Date	Description	Status
9/27/2018	MORSE FALL SCALE	Complete

Action tab showing the completed Morse Fall Scale form with view and print options and status Complete.

Adding notes and collecting signatures

20. Add a note about the incident

Navigate to the **Notes** tab within the incident report, then click **New** to add a note. Enter relevant details about the incident. For example:

... "Mr. Anderson was wearing his house slippers at the time of his fall. Mr. Anderson states none of his shoes fit due to the swelling in his feet. The only footwear Mr. Anderson has to wear is his house slippers."

Keep in mind that notes entered in this section are **not** stored in the medical record. For progress notes that flow to the medical record, use the **Action** tab instead.

PointClickCare

Bimini Sands - Nurse Kelly - Sign Off

Home - Billing - Care Services - Search

Incident #: 40
Client: Anderson, James (1)
Type/Nature of Incident: Witnessed Fall
Date of Incident: 9/27/2018 10:09

Details Injuries Factors Witnesses Action **Notes** Signatures

Next Print Return to Active List

Notes New Notes entered in this section are not stored in the medical record. If you want to create a Progress Note to flow to the medical record, please go to the Action tab.

	Effective Date	Note	Created By
edit del	9/27/2018	Mr. Anderson was wearing his house slippers at the time of his fall. Mr. Anderson states none of his shoes fit due to the swelling in his feet. The only footwear Mr. Anderson has to wear is his house slippers.	2.Destruse

Privileged and Confidential - Not part of the Medical Record - Do not Copy

Bimini Sands
222 First Street
South Park, MD 19129
Phone: (555) 555-5555

PointClickCare
5570 Explorer Drive
Mississauga, Ontario L4W 0C4
Help Desk: (877) 722-2431 | (905) 817-6167
Toll Free: (800) 277-5889 | Phone: (905) 856-8885 |
Fax: (905) 856-8248

Privacy Policy
Customer Support
Version 3.7.15.3 - DEMO/EDU-00005-00005
Copyright 2000-2017 PointClickCare Technologies Inc. All rights reserved.

Notes tab with the New button clicked, cursor on New, and an informational message about notes not being part of the medical record.

21. Review and edit the note

After saving, review the note entry under the Notes tab. You can use the **edit** or **del** (delete) links to modify or remove the note if needed. Confirm the note displays the correct **Effective Date** (for example, 9/27/2018) and is attributed to the correct user.

When finished, click the **Signatures** tab to proceed.

PointClickCare

Bimini Sands - Nurse Kelly - Sign Off

Home - Billing - Care Services - Search

Incident #: 40
Client: Anderson, James (1)
Type/Nature of Incident: Witnessed Fall
Date of Incident: 9/27/2018 10:59

Details Injuries Factors Witnesses Action **Notes** Signatures

Next Print Return to Active List

Notes New Notes entered in this section are not stored in the medical record. If you want to create a Progress Note to flow to the medical record, please go to the Action tab.

	Effective Date	Note	Created By
edit del	9/27/2018	Mr. Anderson was wearing his house slippers at the time of his fall. Mr. Anderson states none of his shoes fit due to the swelling in his feet. The only footwear Mr. Anderson has to wear is his house slippers.	2 Oesthurse

Privileged and Confidential - Not part of the Medical Record - Do not Copy

Bimini Sands
222 First Street
South Park, MD 15129
Phone: (555) 555-5555

PointClickCare
5070 Explorer Drive
Mississauga, Ontario L4W 0C4
Help Desk: (877) 722-2431 | (905) 817-6167
Toll Free: (800) 277-5889 | Phone: (905) 858-8885 | Fax: (905) 858-2248

Privacy Policy
Customer Support
Version 3.7.16.3 - DEMOCEDU-00005-00005
Copyright 2000-2017 PointClickCare Technologies Inc. All rights reserved.

Notes tab showing the entered note about Mr. Anderson's footwear, with edit and delete options and the cursor on the Signatures tab.

22. Sign the incident report

In the **Signatures** tab, review the list of required signers. The table displays positions such as Administrator, Director of Nursing, and Registered Nurse, each with a **sign** link.

Click the **sign** link next to your role to electronically sign the report. Depending on configuration, the system may also allow you to lock the incident report upon signature.

PointClickCare

Bimini Sands - Nurse Kelly - Sign Off

Home - Billing - Care Services - Search

Incident #: 40
Client: Anderson, James (1)
Type/Nature of Incident: Witnessed Fall
Date of Incident: 9/27/2018 10:59

Details Injuries Factors Witnesses Action **Notes** Signatures

Next Print Return to Active List

Notes New Notes entered in this section are not stored in the medical record. If you want to create a Progress Note to flow to the medical record, please go to the Action tab.

	Effective Date	Note	Created By
edit del	9/27/2018	Mr. Anderson was wearing his house slippers at the time of his fall. Mr. Anderson states none of his shoes fit due to the swelling in his feet. The only footwear Mr. Anderson has to wear is his house slippers.	2 Oesthurse

Privileged and Confidential - Not part of the Medical Record - Do not Copy

Bimini Sands
222 First Street
South Park, MD 15129
Phone: (555) 555-5555

PointClickCare
5070 Explorer Drive
Mississauga, Ontario L4W 0C4
Help Desk: (877) 722-2431 | (905) 817-6167
Toll Free: (800) 277-5889 | Phone: (905) 858-8885 | Fax: (905) 858-2248

Privacy Policy
Customer Support
Version 3.7.16.3 - DEMOCEDU-00005-00005
Copyright 2000-2017 PointClickCare Technologies Inc. All rights reserved.

Signatures tab showing sign links for Administrator, Director of Nursing, and Registered Nurse.

23. Verify and manage signatures

Once signed, your name and the date appear in the corresponding row. If needed, use the **unsign** link to remove your signature, or the **Unlock** button to make further edits before finalizing. When all required signatures are collected, the incident report is considered complete.

The screenshot displays the PointClickCare web application interface. At the top, the header includes the PointClickCare logo, user information (Bimini Sands, Nurse Kelly), and a Sign Off link. Below the header, a navigation bar contains links for Home, Billing, and Care Services. The main content area shows details for Incident # 40, Client: Anderson, James (1), with a Type/Nature of Incident: Witnessed Fall and Date of Incident: 9/27/2018 10:09. A tabbed interface at the top of the main content area includes Details, Injuries, Factors, Witnesses, Action, Notes, and Signatures. The Signatures tab is currently selected and highlighted. Below the tabs, there are buttons for Next, Print, and Return to Active List. A message states: "Notes entered in this section are not stored in the medical record. If you want to create a Progress Note to flow to the medical record, please go to the Action tab." Below this message is a table with columns for Effective Date, Note, and Created By. The table contains one entry for 9/27/2018, where the note describes Mr. Anderson's fall and footwear, and it was created by 2.0nestrurse. At the bottom of the page, there is a footer with contact information for Bimini Sands, PointClickCare, and a Privacy Policy link.

Effective Date	Note	Created By
9/27/2018	Mr. Anderson was wearing his house slippers at the time of his fall. Mr. Anderson states none of his shoes fit due to the swelling in his feet. The only footwear Mr. Anderson has to wear is his house slippers.	2.0nestrurse

Signatures tab showing Registered Nurse signed as Nurse Kelly, with an unsign option and the Return to Active List button highlighted.

24. Return to the Active List

Click the **Return to Active List** button to exit the incident report and return to the main list of active incidents. This allows other staff to view, sign, or further process the incident as needed.

The screenshot displays the PointClickCare web application interface. At the top, the header shows 'PointClickCare' and user information: 'Bimini Sands', 'Nurse Kelly', and a 'Sign Off' link. Below the header is a navigation bar with 'Home', 'Billing', and 'Care Services' tabs. A search bar is located on the right. The main content area shows incident details for Incident # 40, Client: Anderson, James (1). The incident type is 'Witnessed Fall', dated 9/27/2018 10:09. The incident is locked by Nurse Kelly. Below the details are tabs for 'Details', 'Injuries', 'Factors', 'Witnesses', 'Action', 'Notes', and 'Signatures'. The 'Signatures' tab is selected, showing a table with columns for Name, Position, and Date. The table lists three signatures: Administrator, Director of Nursing, and Registered Nurse (Nurse Kelly). The 'Return to Active List' button is highlighted. At the bottom, there is a footer with contact information for Bimini Sands, PointClickCare, and a Privacy Policy link.

Name	Position	Date
sign	Administrator	
sign	Director of Nursing	
unsign	Registered Nurse	9/27/2018

Active Incidents list showing incident number 40 for Anderson, James, with options to view, unlock, or print, and the incident pending a signature from the Director of Nursing.

Summary

By following these steps, you create a complete and accurate incident report in PointClickCare — from the initial nursing and resident descriptions, through injury and pain assessment, contributing factors, witness statements, physician notification, and the Morse Fall Scale form, to the final notes and signatures. A thoroughly documented incident report, like the one created here for Mr. Anderson's witnessed fall, is ready for review and sign-off by other staff as needed.