

## Close and Save A Run Sheet= Options and Consequences

There are several options to close and save a run sheet when completed. Each has post run results. The options are:

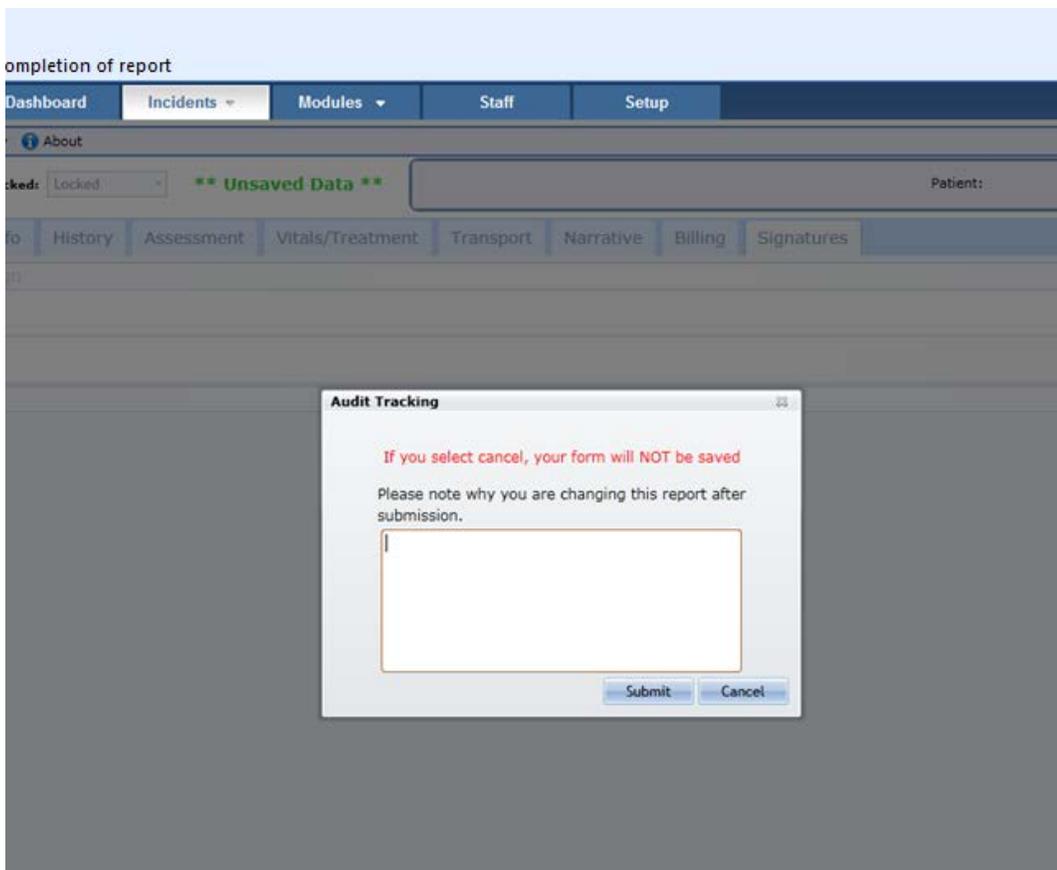
- Select the Mark Run As Completed option.
- Select the Locked: drop down option (default is set to Unlocked when you open a new Run Sheet), select Lock (information is Saved) and then close out of the Run Sheet.
- Select the Save button and then close the program. **(Recommended)**
- Close out of the program.

### Selecting the Mark Run as Completed option

This option closes and locks the run sheet as soon as it is selected.

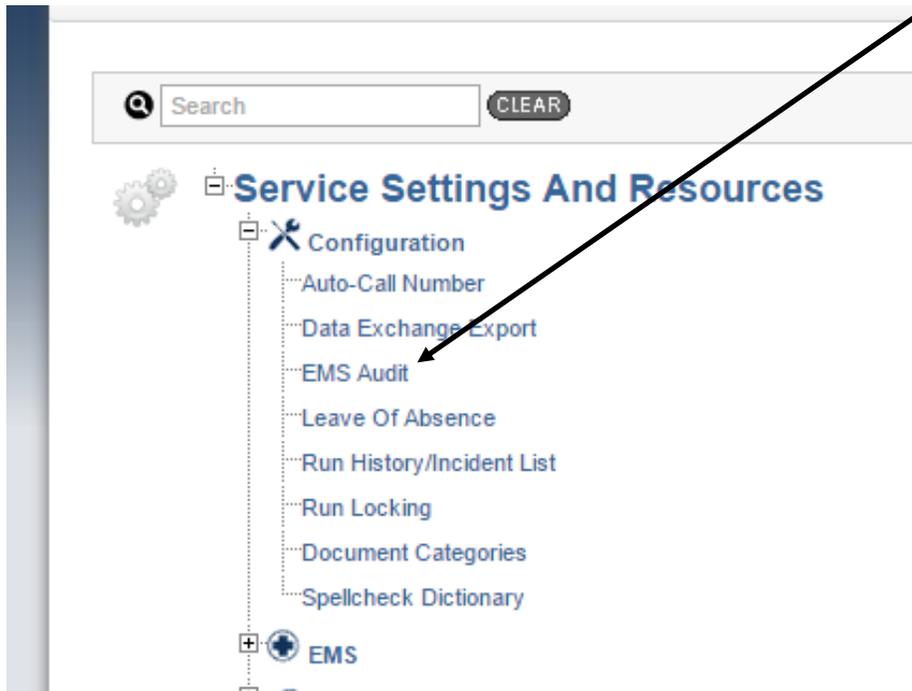


Depending on the options you have chosen for your Service under the Setup tab (or not changed anything and have accepted the Image Trend default options), it will display the **Audit Tracking Box** before you actually close out of the Run Sheet.



After a Run Sheet has been locked, the EMS Service Administrator can set it up so that if others do certain things (amend, print, open, etc.) the Audit Tracking Box pops up and asks for justification. This way the Service Administrator can monitor activity for management purposes regarding access/changes to a Run Sheet. The default from Image Trend is that when Mark Run as Completed is selected, the Audit Tracking Box automatically is displayed because it considers everything done and no need to make any changes later.

To continue to use this option to close out of a Run Sheet, but not have the Audit Tracking Box pop up, go to the Set up tab, Service Settings And Resources, Configuration, EMS Audit.



The following is how the EMS Audit Events Setup default page is set by Image Trend;

**EMS Audit Events Setup**

Select the events to be audited and the reason required message that will be prompted when the event is triggered. The reason required message will only be prompted if "Is Reason Required?" column is set to "Yes".

| Event                              | Status   | Is Reason Required?   | Reason Required Message                   |
|------------------------------------|--|---|---|
| Generate PDF Reports:              | Active ?   | <input checked="" type="radio"/> Yes <input type="radio"/> No | Tell me why you need to see this report.  |
| View Existing Online Report:       | <input type="radio"/> Active <input checked="" type="radio"/> Inactive | <input type="radio"/> Yes <input checked="" type="radio"/> No |   |
| Track All Changes After Completed: | <input checked="" type="radio"/> Active <input type="radio"/> Inactive | <input checked="" type="radio"/> Yes <input type="radio"/> No | Why are you making changes to the report? |
| Bulk Action:                       | Active ?   | <input type="radio"/> Yes <input checked="" type="radio"/> No |   |

**Additional Audit Workflow Configurations**

Mark Runs as Completed Upon Locking Them  Yes  No ?

Update Status Upon Marking Run As Completed  Yes  No ?

Select Status To Update To Requires Review ▼

**Submit**

When selecting the Mark Run as Completed Box to close a Run Sheet, it automatically triggers the Audit Tracking Box to appear before closing out of the Run Sheet and requires a reason.

To continue using the Mark Run as Completed Box to close out from a Run Sheet, but not have the Audit Tracking Box appear, you need to select the Inactive Button and hit Submit. This will eliminate the justification box from appearing when you select Mark Run As Completed.

The screenshot shows a web browser window with the URL `indianaems.isdh.in.gov/resource/intranet/partner/runFormOptions/AuditEventsSetup.cfm?layout=true`. The page title is "EMS Audit Events Setup". Below the title is a navigation bar with tabs for "Dashboard", "Incidents", "Modules", "Staff", and "Setup". The main content area contains a form with the following sections:

- EMS Audit Events Setup**  
Select the events to be audited and the reason required message that will be prompted when the event is triggered. The reason required message will only be prompted if "Is Reason Required?" column is set to "Yes".
- Event Configuration Table:**

| Event                              | Status   | Is Reason Required?   | Reason Required Message                   |
|------------------------------------|--|---|---|
| Generate PDF Reports:              | Active ?   | <input checked="" type="radio"/> Yes <input type="radio"/> No | Tell me why you need to see this report.  |
| View Existing Online Report:       | <input type="radio"/> Active <input checked="" type="radio"/> Inactive | <input type="radio"/> Yes <input checked="" type="radio"/> No |   |
| Track All Changes After Completed: | <input checked="" type="radio"/> Active <input type="radio"/> Inactive | <input checked="" type="radio"/> Yes <input type="radio"/> No | Why are you making changes to the report? |
| Bulk Action:                       | Active ?   | <input type="radio"/> Yes <input checked="" type="radio"/> No |   |
- Additional Audit Workflow Configurations**
  - Mark Runs as Completed Upon Locking Them:  Yes  No ?
  - Update Status Upon Marking Run As Completed:  Yes  No ?
  - Select Status To Update To: Requires Review

At the bottom of the form is a blue "Submit" button. Two black arrows originate from the top of the page: one points to the "Inactive" radio button in the "View Existing Online Report" row, and the other points to the "Submit" button.

This is how the EMS Audit Events Setup page will appear if you make that change.

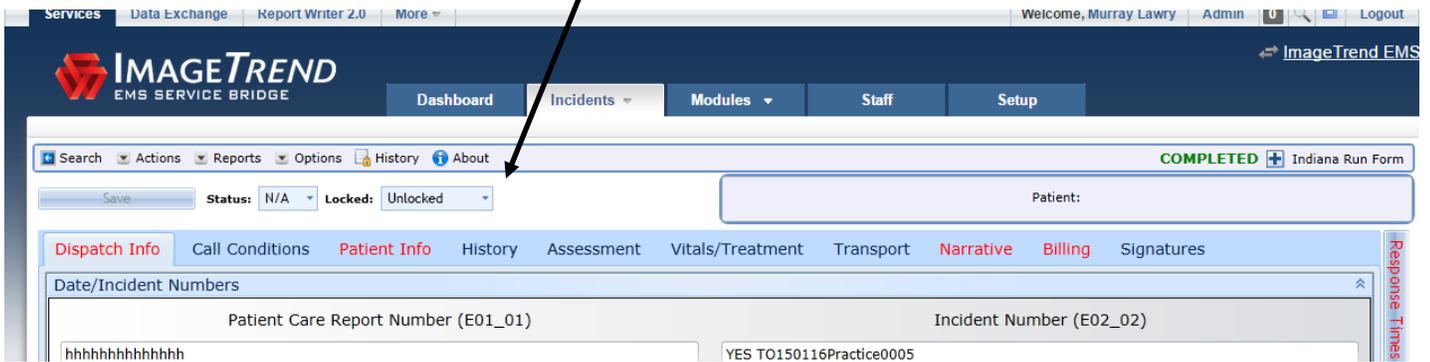
| Event                              | Status   | Is Reason Required?   | Reason Required Message                   |
|------------------------------------|--|---|---|
| Generate PDF Reports:              | Active ?   | <input checked="" type="radio"/> Yes <input type="radio"/> No | Tell me why you need to see this report.  |
| View Existing Online Report:       | <input type="radio"/> Active <input checked="" type="radio"/> Inactive | <input type="radio"/> Yes <input checked="" type="radio"/> No |   |
| Track All Changes After Completed: | <input type="radio"/> Active <input checked="" type="radio"/> Inactive | <input checked="" type="radio"/> Yes <input type="radio"/> No | Why are you making changes to the report? |
| Bulk Action:                       | Active ?   | <input type="radio"/> Yes <input checked="" type="radio"/> No |   |

However if you decide to use the Mark Run As Completed Box to close the Run Sheet and deactivate the Audit Box from appearing, you can't track any future actions of your crew when they later go back into a Run Sheet (i.e.- amend, print, open, etc.)

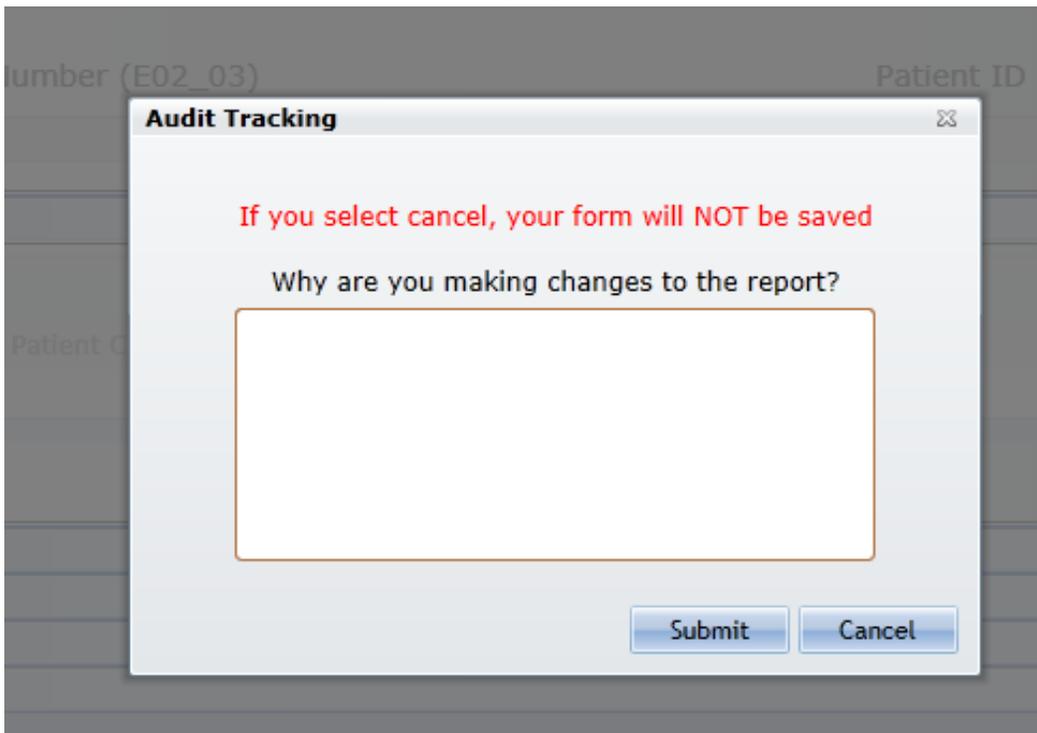
It isn't recommended to use this option because of the finality of it.

## Using Locked Drop Down Option

When you are done with the Run Sheet, go to the **Locked:** option box. The **Locked:** option is defaulted to Unlocked.



When you are finished with the Run Sheet, select the drop down box and choose Locked. Note- If the EMS Audit Events Setup, Track All Changes After Completed option is set to yes, then you will get the Audit Tracking box because you are now finalizing the Run Sheet by selecting Locked.

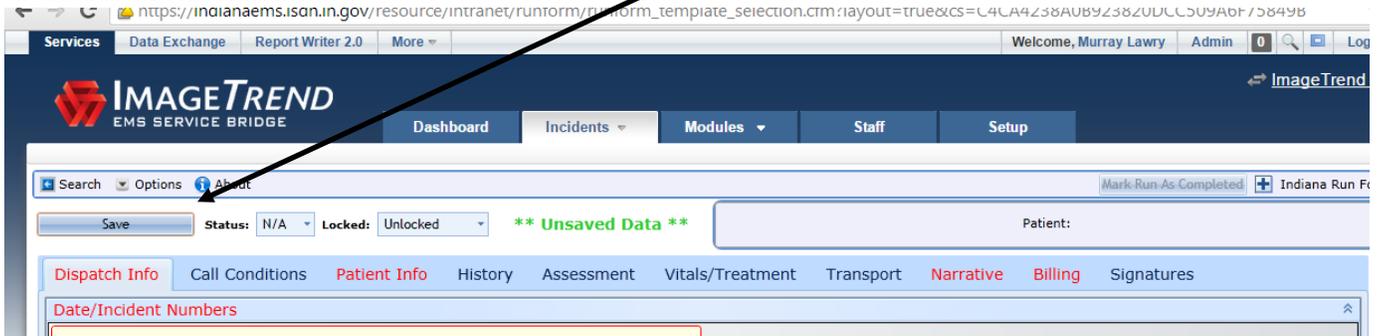


You can change the setting in EMS Audit Events Setup (as described in the Mark Run as Completed option above) so you don't get this Audit Tracking Box. However you will lose the ability to track any future actions on the part of your crew if they ever go back into an old Run Sheet.

Or you can just put in anything in the Audit Tracking Box and hit submit. Then close out of the Run Sheet.

## Save Button (Recommended Method)

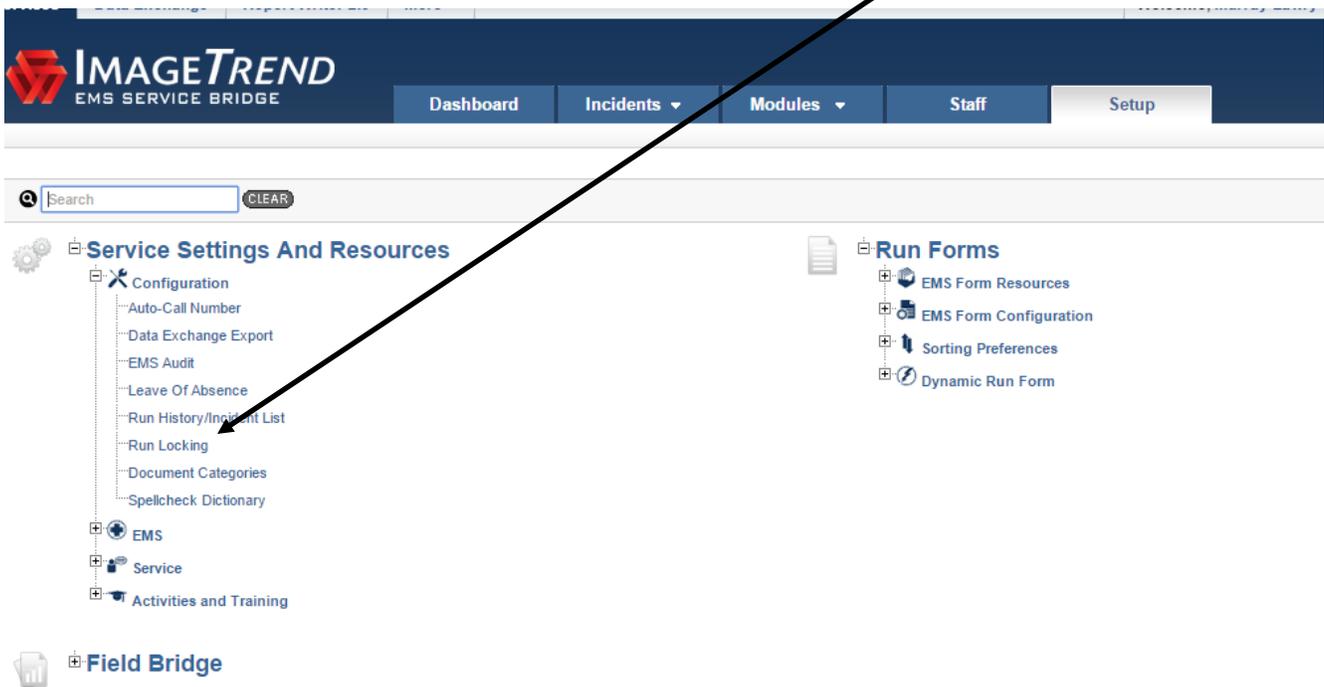
After you complete the Run Sheet, hit the Save button.  
Close out of the Run Sheet.



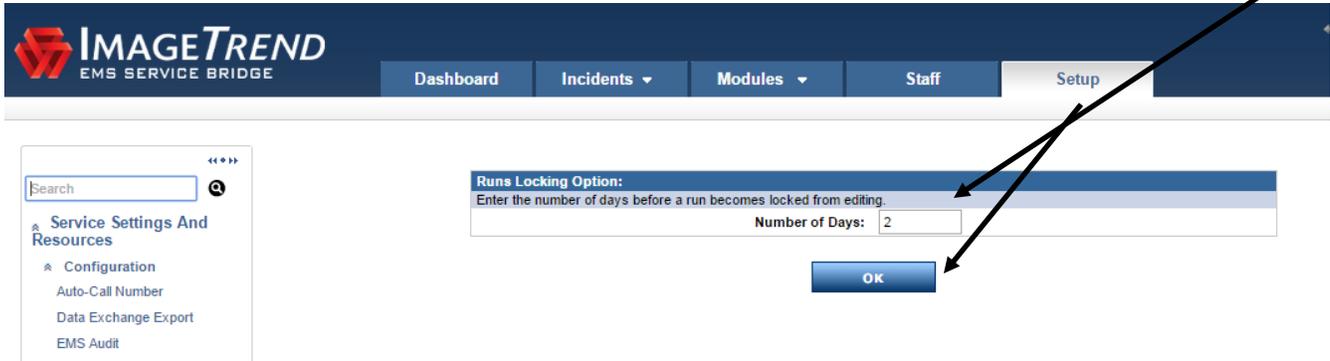
This method is recommended because it is probable that your crew may need to make changes/additions to the Run Sheet within a short period of time after initial completion.

The Image Trend default setting automatically Locks a Run Sheet after 2 days. (The clock begins running at Midnight on the day you initially complete and save the Run Sheet)  
Changes/additions can be made during this time period without triggering the Audit Tracking Box.

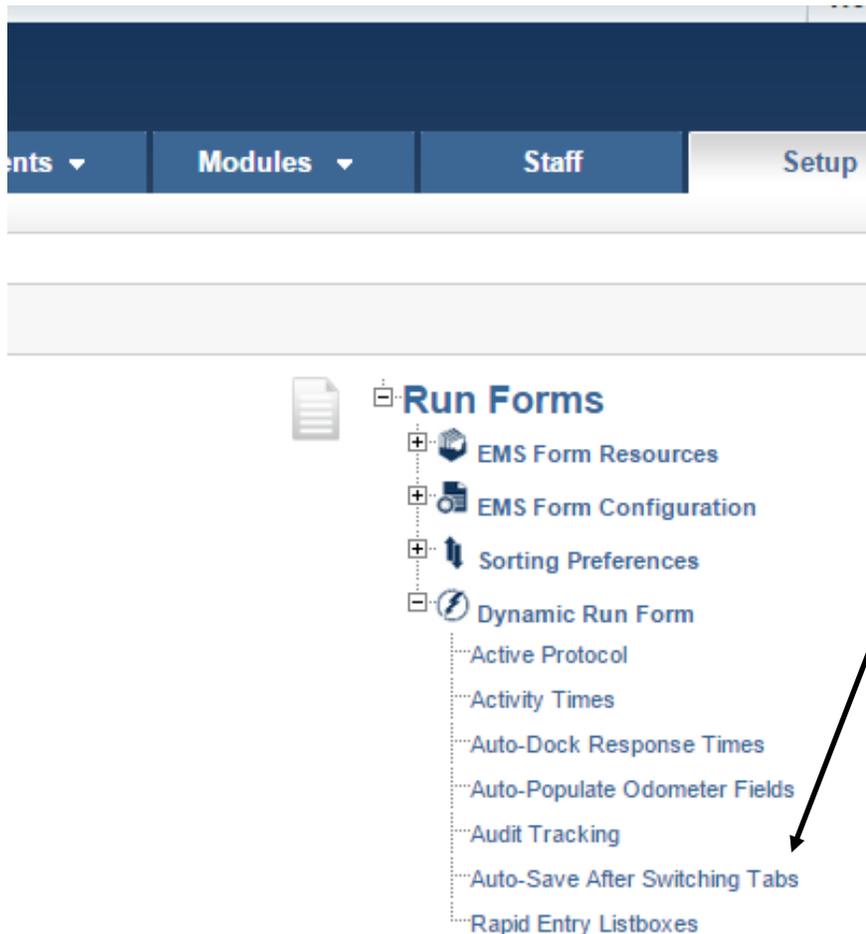
If you as the Service Administrator would like to decrease or increase this from the default setting of two days, go to the Setup tab, Service Settings And Resources, Run Locking:



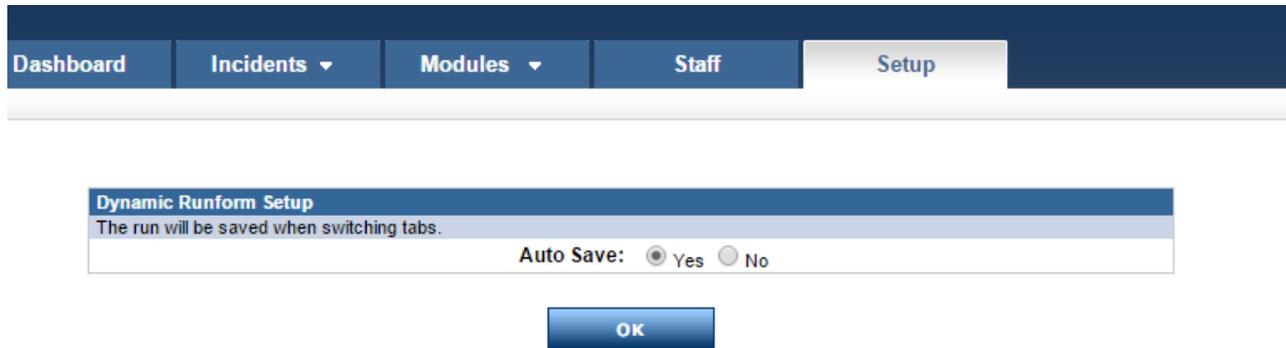
Put in the number of days you want for the Run Sheet to automatically lock and select the OK Box.



**Note- It is recommended that you have your Auto-Save after Switching Tabs turned on.** When you switch between the tabs on the Run Sheet, your information is automatically saved for you. In case of a power interruption you won't lose your information. Go to the Setup tab, Run Forms, Dynamic Run Form, Auto-Save after Switching Tabs.

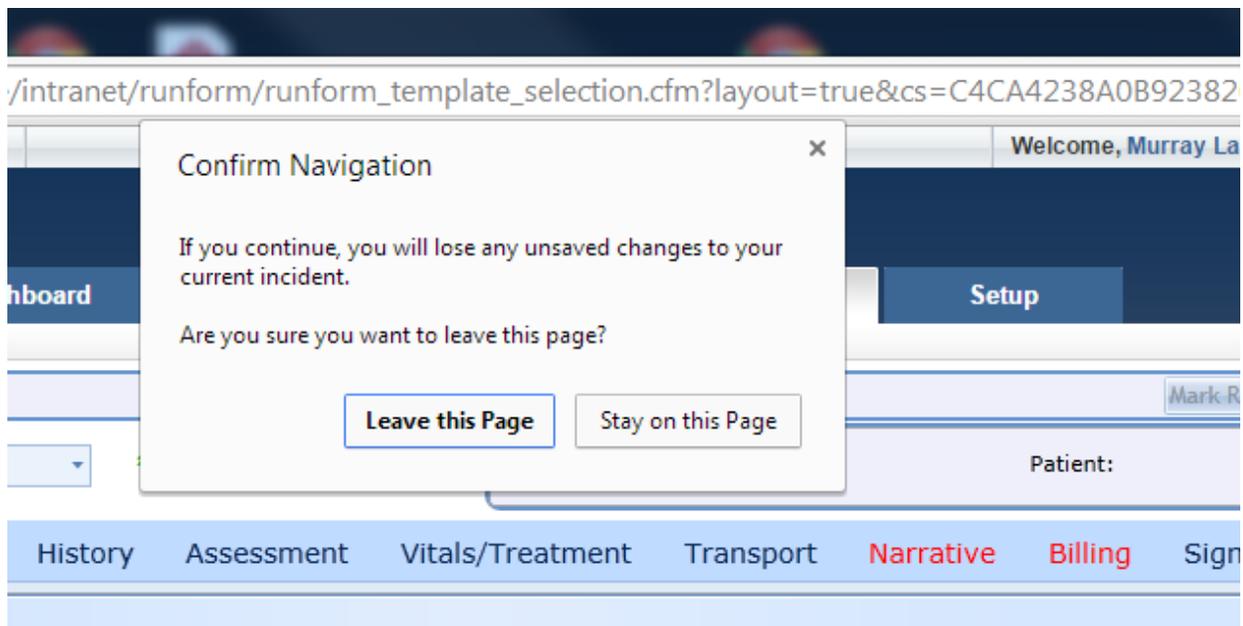


Make sure you have selected Yes. (This is the Image Trend default setting)



### Just Close out of the Run Sheet

If you just close out of the Run Sheet without saving your information, the data won't be saved. If you do this, you will be shown a box asking if you really want to do this.



If you select Leave this Page, your Run Sheet Data will be lost.