

BEEACON

USER GUIDE FOR REPORTING FEATURES





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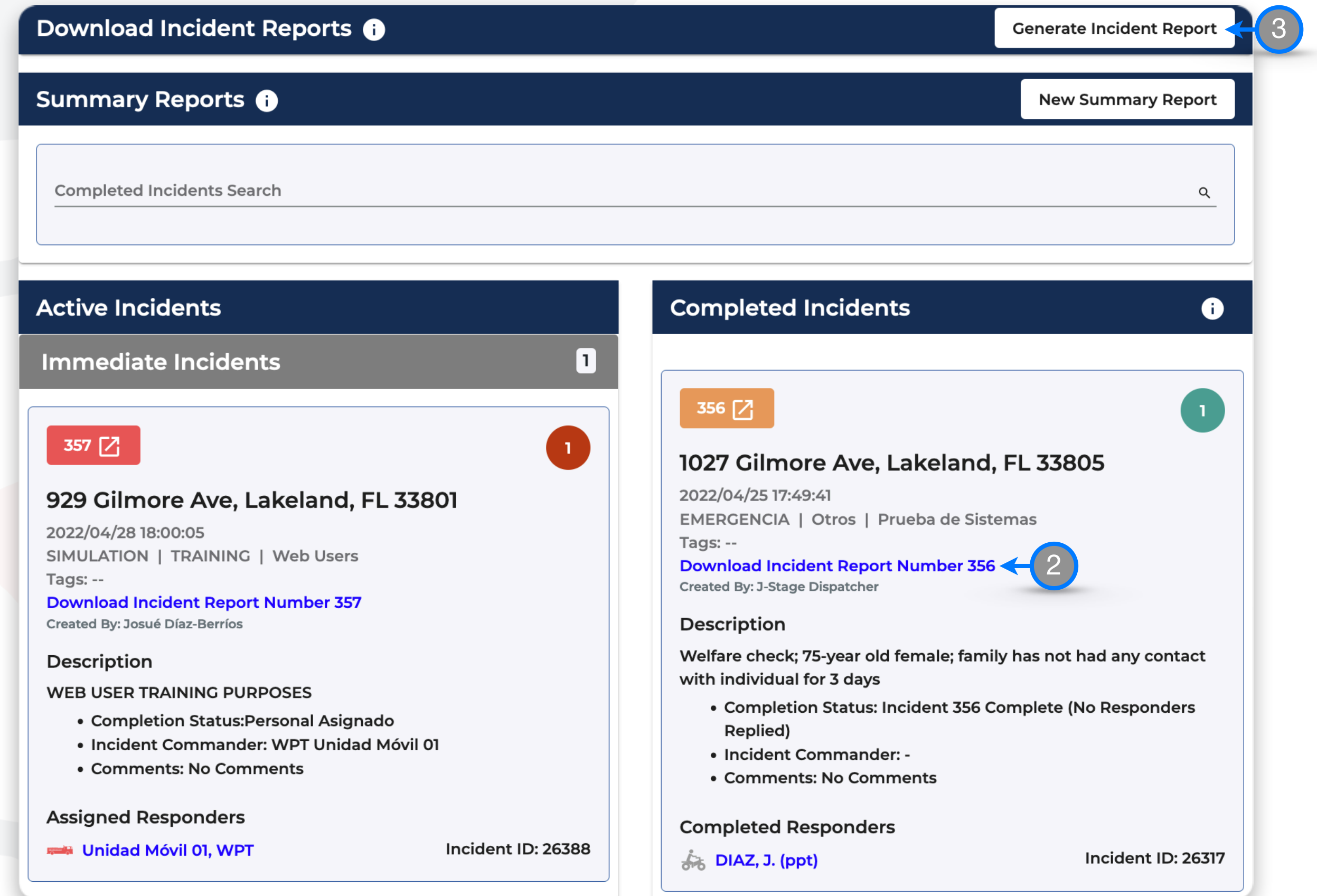
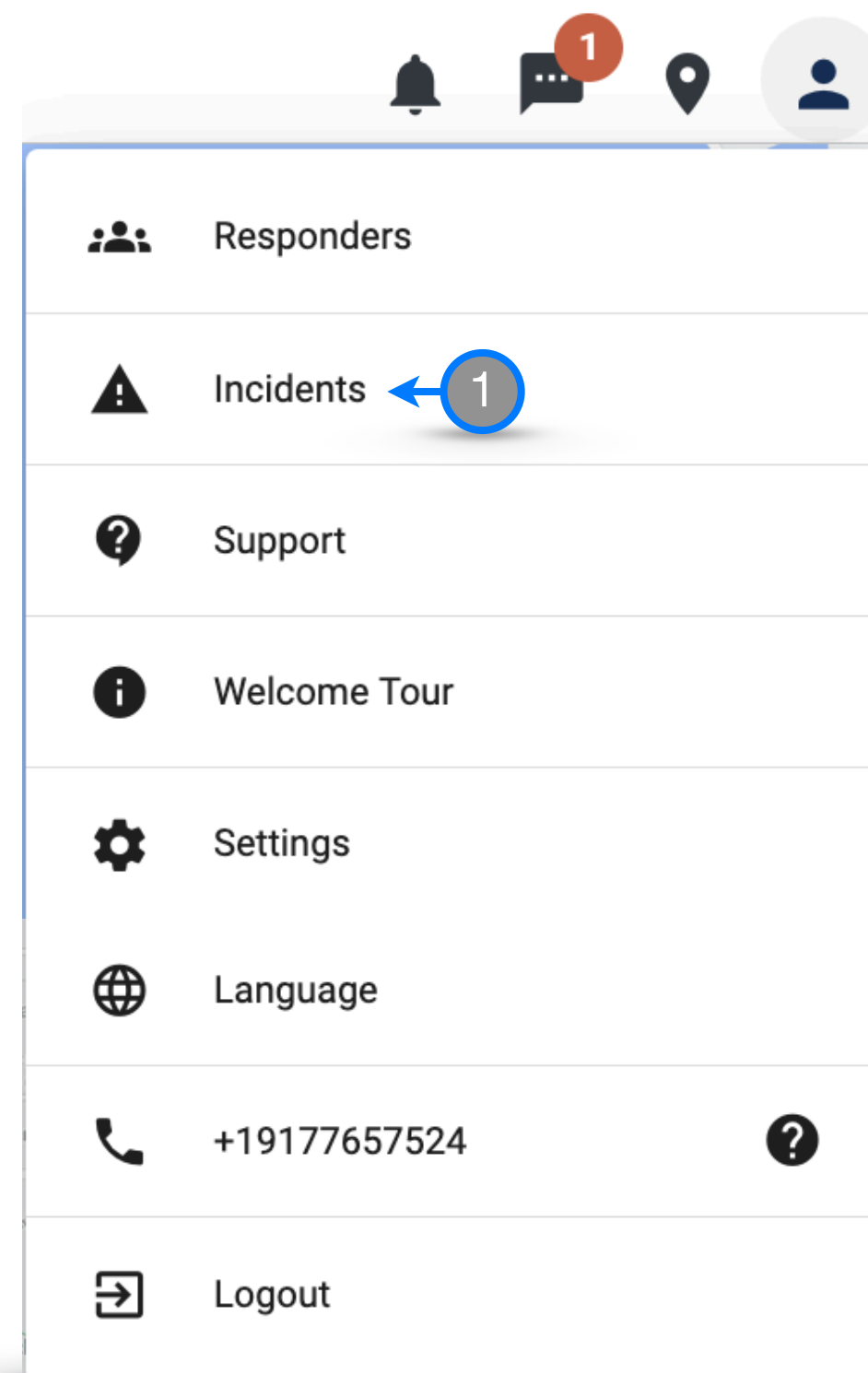


1. Dispatcher Resources Reporting

1.1. Reports that are Automatically Generated by Beacon

To view and download incident reports:

1. Click the **Incidents** tab in the profile menu
2. Download an incident report by clicking the **Incident Report** hyperlink
3. If the Incident Report doesn't download automatically as an excel spreadsheet, click **Generate Incident Report**, which will open up a new screen
4. Enter the **Incident Number**
5. Click the **Generate Report** button





1. Dispatcher Resources Reporting

1.1. Reports that are Automatically Generated by Beacon

1.1.2. Summary Reports

Summary Reports provide a summary of all incidents in a data center over a given period of time. Summary reports are emailed as an Excel spreadsheet that can be manipulated and filtered to query the available data. Summary reports are emailed from info@trekmedics.org, you should add this address to your safe senders list.

To generate and download a summary report:

- 1. Click the **Incidents Tab** in the profile menu
- 2. Click on the **New Summary Report button**
- 3. Enter the Start and End Dates you want to include in the Summary Report
- 4. Confirm/edit email address
- 5. Click the **Create Summary Report**
- 6. Confirmation that your report is being generated and will be emailed to you

BEACON

Incident Reports

Generate Incident Report

Summary Reports

New Summary Report

Completed Incidents Search

Responders

Incidents

Support

Welcome Tour

Settings

Language

+19177657524

Logout

New Summary Report

Summary reports are generated on our servers and sent to your email address. Please enter a valid email address below.

Start Date

End Date

Email

2021-12-01

2021-12-31

info@trekmedics

Search Incidents

STATUS: BEACON TRAINING_2021-12-01_2021-12-31.xlsx will be emailed to you.

Date	#	Activation (incl ID #)	Data Center	Created By	Assigned Responders:	Incident Description	Latitude	Longitude	Address:
October 2020									
020-10-01	1	23:11:59.893	19110	Demo	Beacon Admin	Ricky 1Responder	38.92325665	-77.03500592	2535 15th St NW, Washington, DC 20009
020-10-02	2	11:08:52.486	19122	Demo	Beacon Admin	Incident complete	38.93747645	-77.02796574	1216 Quincy St NW, Washington, DC 20011
020-10-02	3	11:09:41.669	19123	Demo	Beacon Admin	Incident complete	38.92933246	-77.02899601	3101 13th St NW, Washington, DC 20010
020-10-02	4	13:11:27.355	19126	Demo	Beacon Admin	TacOps1, Ricky 1Responder	38.91451009	-77.03552105	1522 Swann St NW, Washington, DC 20009
020-10-03	5	07:29:38.868	19152	Demo	Beacon Admin	Ricky 1Responder, Security2, Nurse1	38.90014995	-77.03791426	748 Jackson Pl NW, Washington, DC 20506
020-10-03	6	08:23:29.831	19155	Demo	Beacon Admin	Ricky 1Responder	38.91433471	-77.05629261	2514 Massachusetts Ave NW, Washington, DC 20008
020-10-03	7	08:38:55.017	19156	Demo	Jay iPhone	Ricky 1Responder, Nurse1	38.9206539	-77.0195759	525 Bryant St NW, Washington, DC 20059, USA
020-10-05	8	18:51:34.803	19208	Demo	Beacon Admin	Ricky 1Responder	38.91731445	-77.03054159	1301 U St NW, Washington, DC 20009
020-10-05	9	22:37:44.006	19217	Demo	Beacon Admin	Ricky 1Responder, Security2, Nurse1	38.92152078	-77.02624893	2335 11th St NW, Washington, DC 20001
020-10-06	10	18:32:58.849	19247	Demo	Beacon Admin	Incident complete	38.92146941	-77.03586666	2406 16th St NW, Washington, DC 20009
020-10-06	11	18:33:32.234	19248	Demo	Beacon Admin	Incident complete	38.92554426	-77.02736782	2724 11th St NW #25, Washington, DC 20001
020-10-07	12	08:22:48.222	19269	Demo	Beacon Admin	Ricky 1Responder, Security2, Nurse1	38.93081493	-77.02653565	1000 Lamont St NW, Washington, DC 20010
020-10-07	13	08:35:16.802	19270	Demo	Jay iPhone	Security2, Ricky 1Responder	39.0031067	-76.991375	910 Malcolm Dr, Silver Spring, MD 20901, USA
020-10-07	14	15:44:14.367	19285	Demo	Beacon Admin	Ricky 1Responder	38.97802333	-76.97423192	2135 Drexel St, Hyattsville, MD 20783
020-10-09	15	12:06:43.033	19339	Demo	Beacon Admin	TacOps1, Ricky 1Responder, Security2	38.91145246	-77.07536185	Floor 1, Rm 254
020-10-09	16	12:09:43.964	19340	Demo	Beacon Admin	Ricky 1Responder, Security2, Nurse1, I	38.91132843	-77.0753354	3800 Reservoir Rd NW, Washington, DC 20007
020-10-09	17	12:10:41.012	19341	Demo	Beacon Admin	Logs1	38.91157049	-77.07574332	West wing, Floor 3, RM 43
020-10-09	18	12:33:07.689	19343	Demo	Beacon Admin	Engine1, Ricky 1Responder, Nurse1, D	38.91073042	-77.07500808	ED, East Wing, Floor1
020-10-09	19	12:34:09.331	19344	Demo	Beacon Admin	Security2, Mental Health1, Logs1	38.91142852	-77.07608561	ICU, West Wing, FL 2, RM 42
020-10-13	20	11:04:56.203	19463	Demo	Beacon Admin	Ricky 1Responder	38.9194159	-77.02551548	913 W St NW, Washington, DC 20001
020-10-13	21	11:38:16.525	19465	Demo	Beacon Admin	Ricky 1Responder	38.90937766	-77.04308043	1898 Massachusetts Ave NW, Washington, DC 20036
020-10-15	22	12:57:25.475	19531	Demo	Beacon Admin	Incident complete	38.93113432	-77.02849285	3309 Sherman Ave NW, Washington, DC 20010
020-10-15	23	12:59:05.016	19532	Demo	Beacon Admin	Ricky 1Responder	38.91584551	-77.04117812	1769 T St NW, Washington, DC 20009
020-10-15	24	13:12:10.872	19533	Demo	Beacon Admin	Ricky 1Responder	38.90457195	-77.05616176	2727 Pennsylvania Avenue NW, Washington, DC 20007



1. Dispatcher Resources Reporting

1.2. Documentation that is Manually Added by Responders

Incident Notes are stored in the Incident Report. To retrieve and view the Incident Report:

1. First, go to the **Incidents tab** in the Profile Menu
2. Find the Incident you are looking for and click the **Incident Report link** to download the report in an excel spreadsheet. The Incident Notes can be found at the bottom of the Incident Report

A couple other things to keep in mind regarding Incident Notes:

- Incident Reports are accessible via the Incidents page only for the past 30 days. To retrieve and view Incident Reports that are older than 30 days, simply enter this link in your web browser with the correct Incident ID Number at the end.
 - For example, if you wanted to retrieve the report for Incident 7736, you would enter this url in your web browser: <https://beacon.trekmedics.org/incident/7736>
- Only Responders who have been assigned to an incident can submit notes (Read how to [Submit Incidents Notes by SMS](#))
 - Dispatchers can't submit notes via SMS; they are able to do so through the **Comments** section on the [Incident Details page](#)
- Notes can be submitted via SMS or when completing the response to the incident on the mobile app
- Responders can submit notes as many times as they wish, but they can't be erased
- Notes can be submitted at any point after the Responder has been assigned to an incident – i.e., while the incident is still active or after it's been completed

1.2.1. Incident Notes

Beacon allows [Responders to submit notes for incidents](#) that they were assigned to by SMS. These notes are collected and displayed in the Incident Report. This page details how Web Dispatchers can retrieve and update the Incident Reports in order to view the Incident Notes submitted.

The screenshot displays the Beacon web interface for incident reporting. At the top, there's a dark blue header with 'Download Incident Reports' and a 'Generate Incident Report' button. Below this is a 'Summary Reports' section with a search bar. The main content area is divided into two columns: 'Active Incidents' and 'Completed Incidents'. The 'Active Incidents' column shows a list of incidents, with one incident (357) highlighted. The 'Completed Incidents' column shows a list of completed incidents, with one incident (356) highlighted. A red circle with the number 1 points to the 'Incidents' tab in the left sidebar, and a red circle with the number 2 points to the 'Download Incident Report Number 356' link in the 'Completed Incidents' section.

Download Incident Reports ⓘ **Generate Incident Report**

Summary Reports ⓘ **New Summary Report**

Completed Incidents Search 🔍

Active Incidents

Immediate Incidents 1

357 ⓘ 1

929 Gilmore Ave, Lakeland, FL 33801

2022/04/28 18:00:05
SIMULATION | TRAINING | Web Users
Tags: --
[Download Incident Report Number 357](#)
Created By: Josué Díaz-Berrios

Description

WEB USER TRAINING PURPOSES

- Completion Status: Personal Asignado
- Incident Commander: WPT Unidad Móvil 01
- Comments: No Comments

Assigned Responders

🚒 [Unidad Móvil 01, WPT](#) Incident ID: 26388

Completed Incidents ⓘ

356 ⓘ 1

1027 Gilmore Ave, Lakeland, FL 33805

2022/04/25 17:49:41
EMERGENCIA | Otros | Prueba de Sistemas
Tags: --
[Download Incident Report Number 356](#) 2
Created By: J-Stage Dispatcher

Description

Welfare check; 75-year old female; family has not had any contact with individual for 3 days

- Completion Status: Incident 356 Complete (No Responders Replied)
- Incident Commander: -
- Comments: No Comments

Completed Responders

🚒 [DIAZ, J. \(ppt\)](#) Incident ID: 26317



1. Dispatcher Resources Reporting

1.2. Documentation that is Manually Added by Responders

Beacon Web Users with the Manager role can **add, edit** or **delete** users to grant access to Case Reports

To access the User Registry:

1. From the Beacon Dashboard, navigate to the profile menu and select **Settings**
2. Navigate to the **Reports** menu and click the “**View**” button for the **Case Reports User List** and it will open the interface where you can add users or manage current ones
3. Fill this form to create a **new** Case Report User. Please confirm the email address is correct before clicking create.
4. **Users List** — Displays the current users that are able to create, amend and view Case Reports
 - A. **Reset Password** — will send the specific user an email containing a reset password link
 - B. **Action Buttons** — allow you to edit information or delete the user form the Beacon database

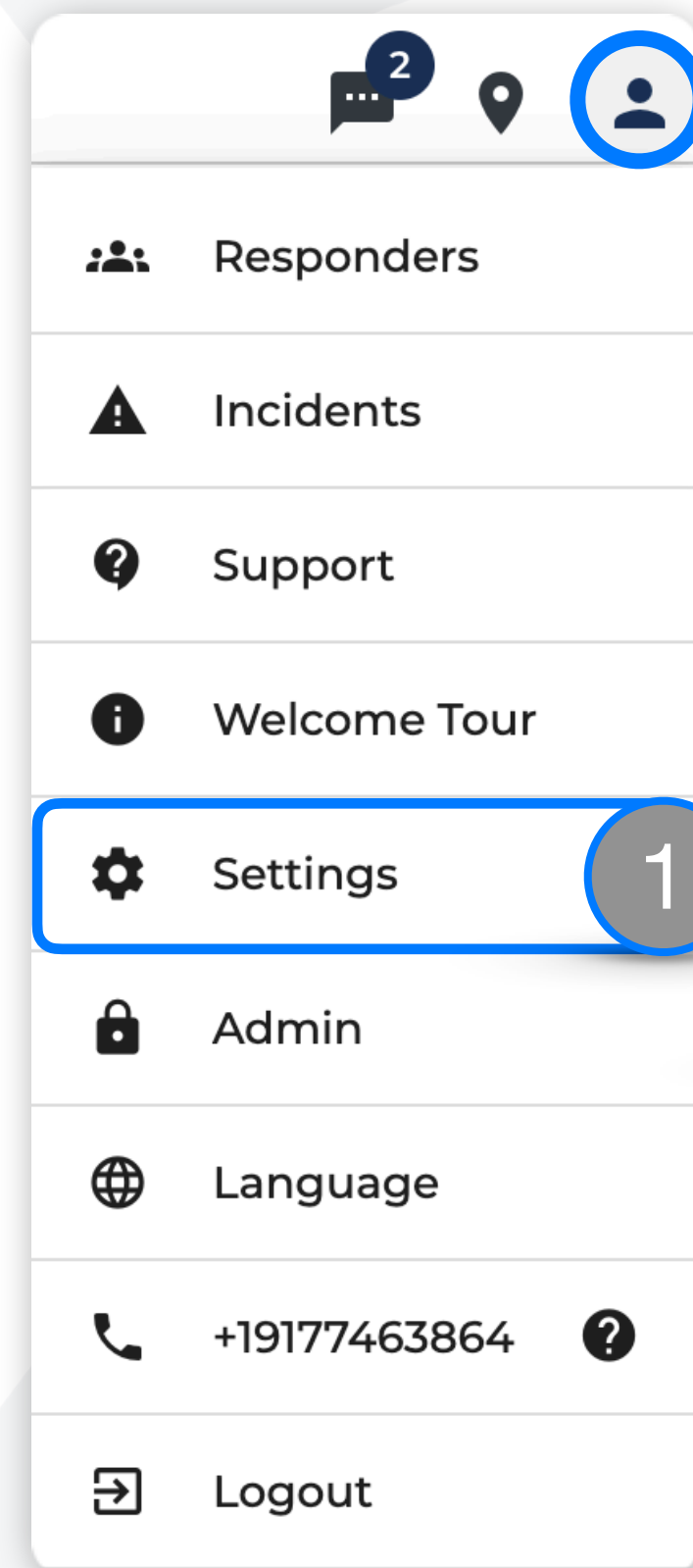
*** Additional Notes:

- Email and password will always be required for users each time they access the **Case Reports** or **Audit Log** interfaces

1.2.2. Case Reports

1.2.2.1. User Registry

Responders who will be creating Case Reports through the mobile app need to be added to this Registry beforehand, otherwise they will not be able to access the feature on their devices.



Add Case Report User

Add Case Report Users here and then send them an email invite to set their password

First Name: Josue, Last Name: Diaz Response-01, Email: josue.r01@trekmedics.org

Create

Clicking "Create" will send an email to the Case Report User asking them to set their password

First Name	Last Name	Email
Josue	Diaz Response-01	josue.r01@trekmedics.org

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1. Dispatcher Resources Reporting

1.2. Documentation that is Manually Added by Responders

Access the web user creation interface:

1. From the Beacon Dashboard, navigate to the profile menu and select **Settings**
2. Navigate to the Resource List menu and click the “**View**” button for the **Web App Users List** and it will open the interface where you can create new users or manage current ones

To grant Case Report access to a Web App User:

3. Scroll down if needed to display the users list. Locate the user you would like to grant access to and, under **Actions**, use the **Edit** icon
4. The user information will display on the above form. Select which access you will grant this user:
 - A. **Case Report Access** — Gives the user access to view and download Case Reports
 - B. **Audit Log Access** — Gives the user the ability to monitor historical activity related to Case Reports on their agency account. This access does not include Case Report viewing or downloading capabilities.

*** Additional Notes:

- Email and password will always be required for users each time they access the **Case Reports** or **Audit Log** interfaces

1.2.2. Case Reports

1.2.2.2.Web User Access

Beacon Web Users with the Manager role can **edit** other web users to grant access to Case Reports

Resource Lists

Web App Users List **View**

SMS Dispatch Numbers **View**

Web User Listing

Edit User

USER ROLE

☐ MANAGER ☒ WEB DISPATCHER

Username: web.dispatcher00 ✓ First Name: Josue ✓ Last Name: Diaz ✓ Phone Number: +1 18005556789 ✓

Email: web.dispatcher@trekm... ✓ Data Center: BEACON Training [Pro... ✓

Additional Data Center Permissions: BEACON Training [Prod] Unselect All

Password: Password Confirmation: Language: English ✓

Case Report Access **A**

Audit Log Access **B**

Save **Cancel Edit**

Username	Last Name	First Name	User role	Data Center	Date Created:	Last Active	Activity	Actions
Days	Joshua	Web Dispatcher	BEACON TRAINING [STG]	2021-09-03	2023-02-19			
Diaz	Josue	Manager	BEACON TRAINING [STG]	2023-01-26	2023-01-26			
Diaz	Josue	Manager	BEACON TRAINING [STG]	2021-07-27	2023-02-19			

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1. Dispatcher Resources Reporting

1.2. Documentation that is Manually Added by Responders

1.2.2. Case Reports

1.2.2.3. Custom Documentation

Beacon Web Users with the Manager role can **add Custom Documents** that will be available for Responders to use in the Documents section of the Case Reports

To upload a Custom Document:

1. From the Beacon Dashboard, navigate to the profile menu and select **Settings**
2. Navigate to the **Reports** menu and click the “**Upload**” button next to the **Custom Document Upload** title.
3. The **Custom Documentation Upload** window will pop up. Click **Choose File** to select a file from your computer then click save to complete the upload
4. **Saved Documents** — A list of uploaded files will be displayed here. Any file on this list will be available for mobile app users when creating a **Case Report**.
5. You can delete a specific file by clicking on the **Trash** icon. Deleted files will no longer be available for mobile app users when creating a **Case Report**

NOTE: Beacon allows agencies to upload Custom Documents, but you will have to use a separate software to edit them.

The screenshots illustrate the process of uploading a custom document in the Beacon system:

- Step 1:** The profile menu is open, and the **Settings** option is selected.
- Step 2:** The **Reports** menu is open, and the **Upload** button next to **Custom Document Upload** is highlighted.
- Step 3:** The **Custom Documentation Upload** window is shown, with the **Choose File** button highlighted.
- Step 4:** The **Saved Documents** list is displayed, showing a file named **Custom Document Example.pdf**.
- Step 5:** The **Trash** icon next to the file in the list is highlighted, indicating the deletion step.



1. Dispatcher Resources Reporting

1.2. Documentation that is Manually Added by Responders

1.2.2. Case Reports

1.2.2.4. Downloading Case Reports

Web App users with the correct permission can download Case Reports.

To download a Case Report (only possible via the Beacon Web Application)

1. From the Beacon Dashboard, navigate to the profile menu and select **Case Reports**.
2. On the list, locate the Case Report you are looking for and click the **Download Icon**.
3. The Case Report will be compiled and download as an **.xlsx** file
4. Click the **View Icon** to show the **Revision History** of a Case Report
 - a. **ID** — this number pertains to the revision created for the case report. If the case report was never amended this list will only display one revision

*** Additional Notes:

- Username and password will always be required for users each time they access the **Case Reports** or **Audit Log** interfaces

2

Responders

Incidents

1

Case Reports

Audit Log

Support

Welcome Tour

Settings

Admin

Language

+19177463864

Logout

Case Reports

Incident Number	Case Report ID	Incident Date	Time	Report Type	Responder Name	Incident Address	History / Download
16	156	2024/02/02	10:04:21	amended	14 UNIT	916 Home Grove Dr, Winter Garden, FL 34787	2
16	155	2024/02/02	10:04:21	amended	Unit A10-SGE	916 Home Grove Dr, Winter Garden, FL 34787	
5	152	2024/01/17	10:26:27	amended	14 UNIT	4412 N Hiawasse Rd, Pine Hills, FL 32818, USA	
88	132	2024/01/09	23:06:16	amended	14 UNIT	6802 Alta Westgate Dr, Pine Hills, FL 32818	4

3

case_report_132.xlsx

4

Revisions

Revisions History

ID	Case Report ID	Created Date/Time	Created By	Incident Address	User Id
2	132	2024/01/09 23:48:53	14 UNIT	6802 Alta Westgate Dr, Pine Hills, FL 32818	4883
1	132	2024/01/09 23:48:49	14 UNIT	6802 Alta Westgate Dr, Pine Hills, FL 32818	4883



1. Dispatcher Resources Reporting

1.2. Documentation that is Manually Added by Responders

1.2.2. Case Reports

1.2.2.5. Accessing the Audit Log

Web App users with the correct permissions can monitor and download Case Reports activity.

To access the Audit Log:

1. From the Beacon Dashboard, navigate to the profile menu and select **Audit Log**
2. The **Audit Log History** will show a list of all activity related to **Case Reports**. You can use a Start / End Date range or Incident Number to **Filter Activity**
3. **Generate Report** — Use this button to compile an **Audit Report** that will be delivered to the user's registered email as a **.csv** file. The report will be generated with the activity according to the filters applied to the list.

Audit Log History

Start Date End Date

Incident Number

Filter Activity

Access Date	Access Time	First Name	Last Name	User Name	User Type	Activity	Incident Number
2024/02/05	10:44:22	Beacon	Manager	manager.training	Manager	download	88
2024/02/05	10:43:30	Beacon	Manager	manager.training	Manager	download	88
2024/02/02	11:06:09	Unit	A10-SGE	+18005554214	Mobile Dispatcher	show	16
2024/02/02	11:04:07	Unit	A10-SGE	+18005554214	Mobile Dispatcher	show	16
2024/02/02	10:58:56	Unit	A10-SGE	+18005554214	Mobile Dispatcher	show	16
2024/02/02	10:58:03	Unit	A10-SGE	+18005554214	Mobile Dispatcher	update	16
2024/02/02	10:57:41	14	UNIT	+18005554214	Mobile Dispatcher	show	16
2024/02/02	10:55:16	14	UNIT	+18005554214	Mobile Dispatcher	update	16
2024/02/02	10:54:56	Unit	A10-SGE	+18005554214	Mobile Dispatcher	show	16
2024/02/02	10:52:54	Unit	A10-SGE	+18005554214	Mobile Dispatcher	show	16

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Generate Report

*** Additional Notes:

- Username and password will always be required for users each time they access the **Case Reports** or **Audit Log** interfaces

✓ Request has been submitted to email audit log report.



2. Responder Resources Reporting - Documentation

2.1. Submit Incident Notes

About Incident Notes for Responders

Beacon makes it possible for responders to submit and store notes for incidents to which they were assigned up to thirty (30) days after the incident. Mobile dispatchers are also able to add incident notes for incidents that they dispatched from their mobile device.

Privacy Disclaimer

*The Incident Notes feature **is not** for the collection and storage of personally identifiable information (PII) or personal health information (PHI). It is against our policy for any PII/PHI to be submitted here. PII/PHI includes, but is not limited to, full name, government identification numbers, driver's license number, bank account number, passport number, date and/or place of birth, bio-metric records et al. This feature is only intended for information which would not be considered PII/PHI.*



2. Responder Resources Reporting - Documentation

2.1. Submit Incident Notes

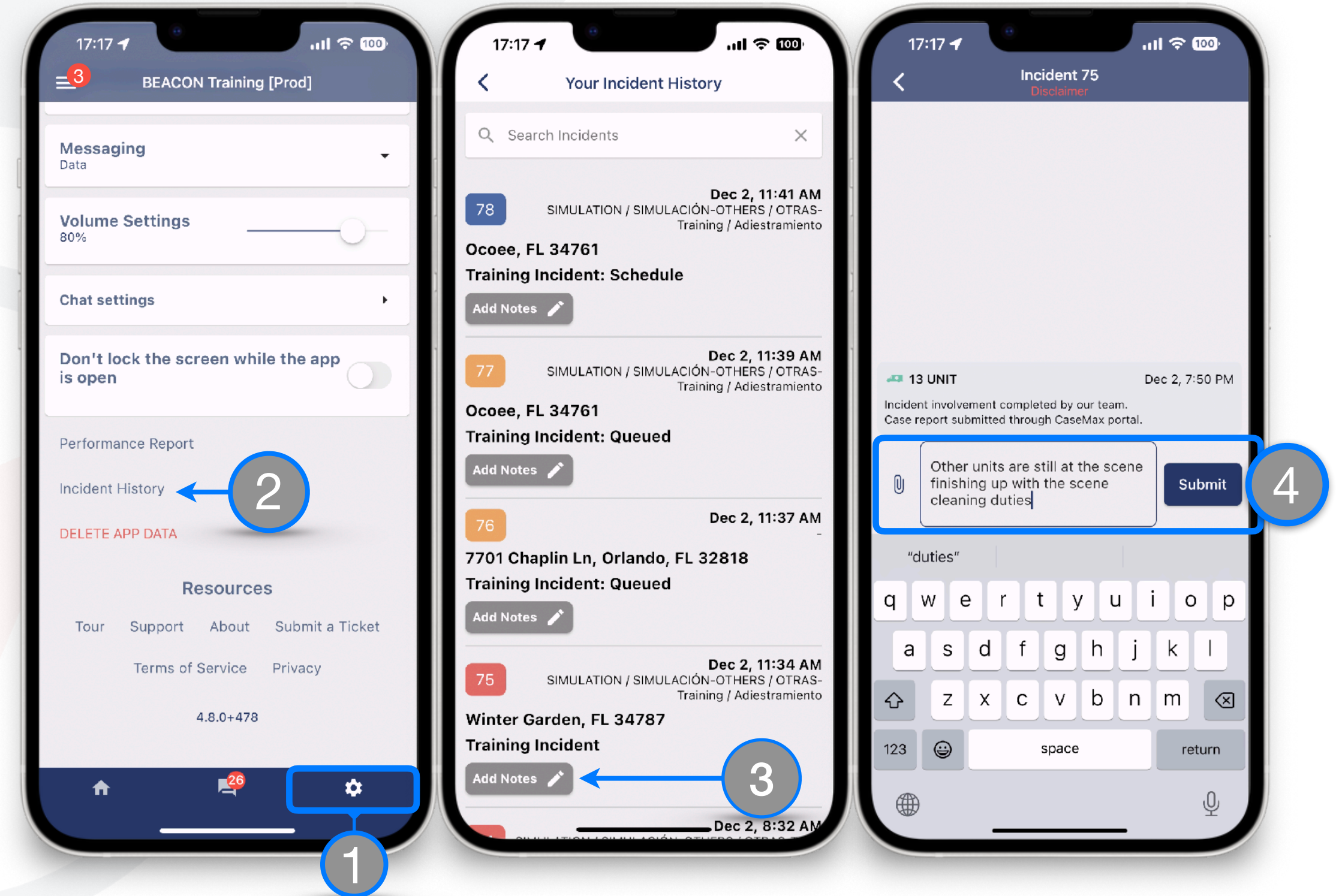
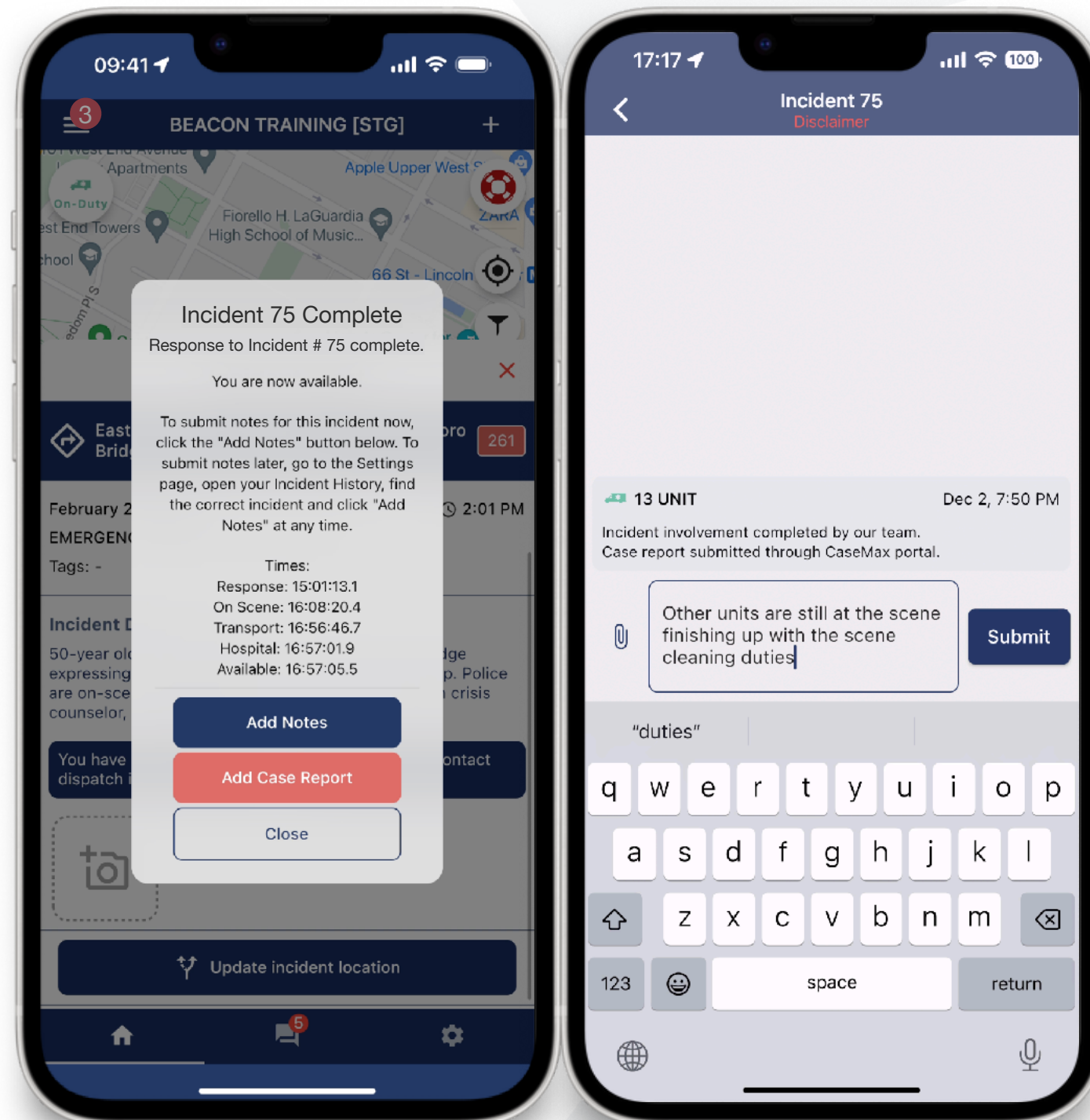
2.1.1. Through the Mobile App

To Submit Incident Notes using the Incident History:

The **Response Times Summary** is sent to responders whenever their involvement in an incident ends.

You can choose to **Add Notes** by pressing the button here and the incident notes interface will open for that specific incident. You can also add notes later using the **Incident History**.

Case Reports is an Add-On Feature of the Beacon Platform and is not enabled by default. Send an email to info@trekmedics.org to talk with a Support Team member about the Case Reports feature for your agency account.



1. Go to the **Settings** Screen
2. Scroll down to the **Incident History** button

3. Locate the incident number for which you wish to add notes and click on the **Add Notes** button
4. Enter your notes and click **Submit** to save

* Be aware that Incident Notes are permanent and cannot be edited or deleted from the incident record.

A couple other things to keep in mind regarding Incident Notes:

- Only Responders who have been assigned to an incident can submit notes
- Responders can submit notes as many times as they wish, but they can't be erased
- Incident History only displays incidents attended or dispatched in the previous thirty days

- Notes can be submitted at any point after the Responder has been assigned to an incident – i.e., while the incident is still active or after it's been completed
- Notes are stored in the Incident Report ([click here to read how to retrieve and view notes in the Incident Report](#))



2. Responder Resources Reporting - Documentation

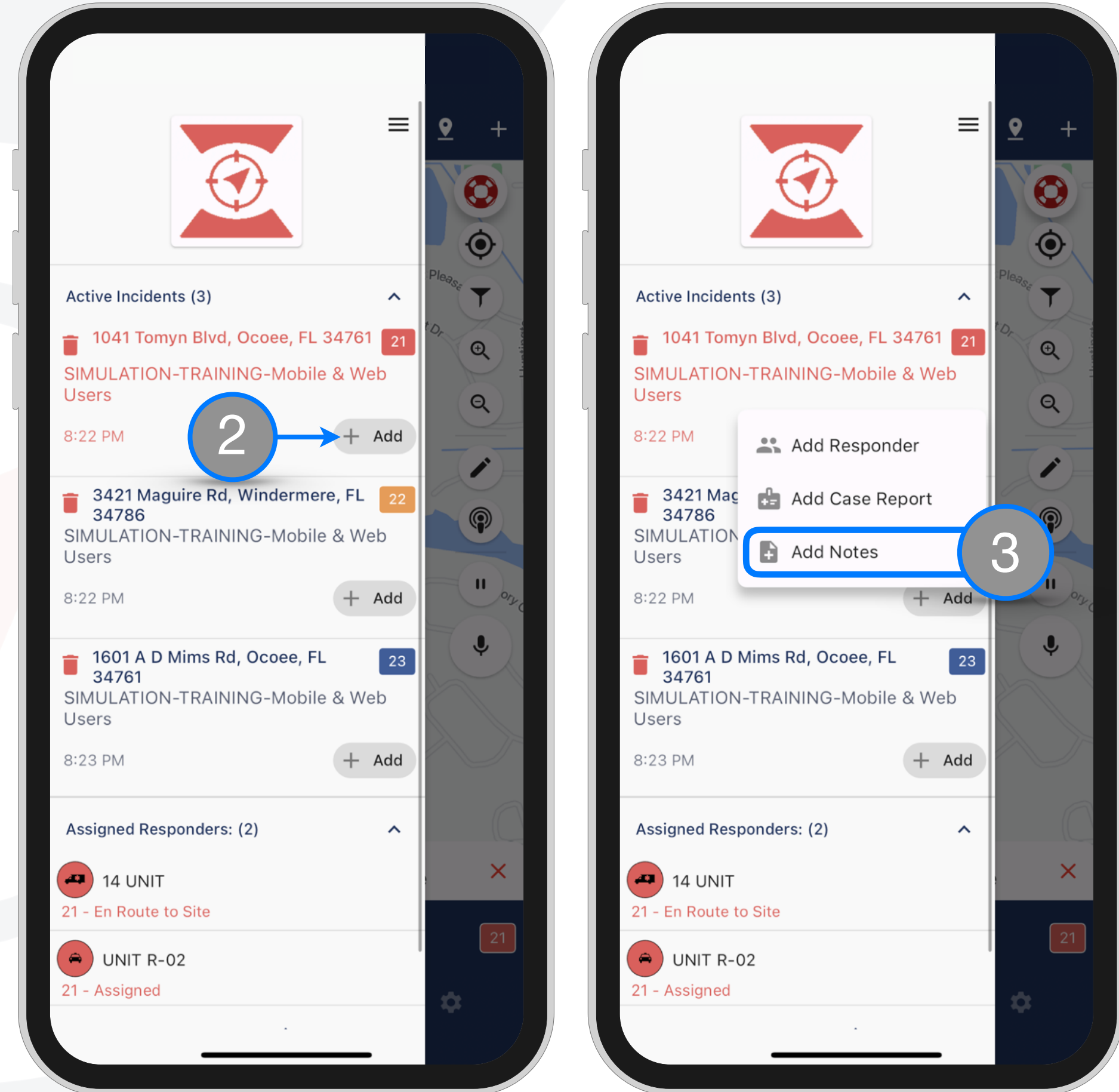
2.1. Submit Incident Notes

2.1.1. Through the Mobile App

To add notes using the sidebar:

1. From the Home Screen, press the **sidebar** icon (not shown)
2. Locate the active incident you would want to add notes to and press the **+ Add** button
3. From the list select **+ Add Notes** to access the incident notes interface

The Incident Notes feature can also be accessed through the sidebar while an incident is active.



*** Be aware that Incident Notes are permanent and cannot be edited or deleted from the incident record.**

A couple other things to keep in mind regarding Incident Notes:

- Only Responders who have been assigned to an incident can submit notes
- Responders can submit notes as many times as they wish, but they can't be erased
- Incident History only displays incidents attended or dispatched in the previous thirty days

- Notes can be submitted at any point after the Responder has been assigned to an incident – i.e., while the incident is still active or after it's been completed
- Notes are stored in the Incident Report ([click here to read how to retrieve and view notes in the Incident Report](#))



2. Responder Resources Reporting - Documentation

2.1. Submit Incident Notes

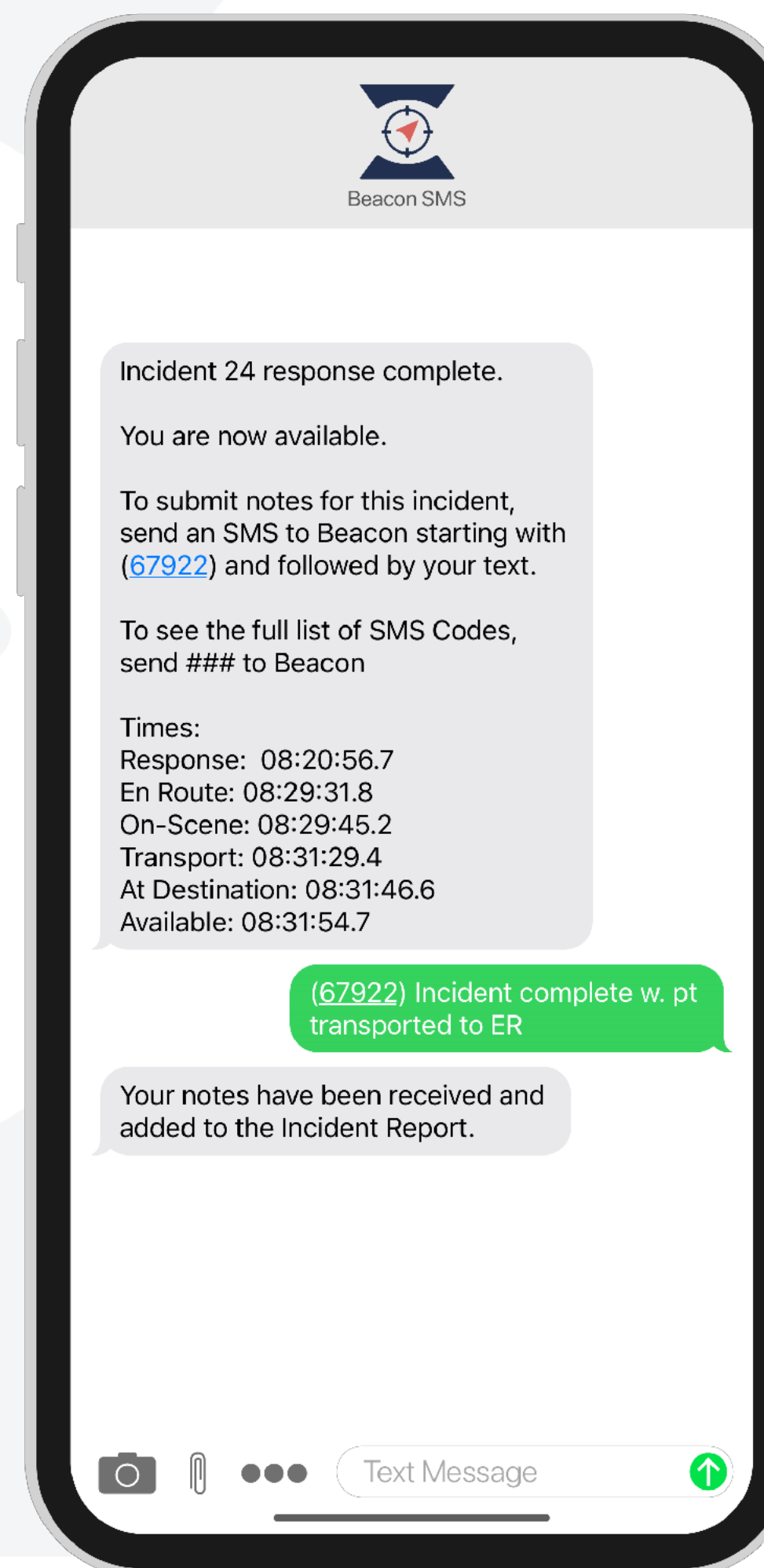
2.1.2. Through SMS

About Incident Notes for Responders

Beacon makes it possible for responders to submit and stores notes for incidents that they were assigned to. Submitting incident notes via SMS is possible. These instructions will show you how to do it.

To Submit Incident Notes through SMS

1. To submit Incident Notes, the Responder must first know the ID of the incident that they were assigned to
2. When the Responder is ready to submit their notes, they will start a new SMS message that contains the Incident ID inside a parentheses, like this: **(67922)**
 - There should be no spaces before or after the Incident ID
 - Once the Responder has written their notes, they will send the message to Beacon, just like any other SMS they send to Beacon
3. When the notes have been received Beacon will send back a confirmation explaining the same





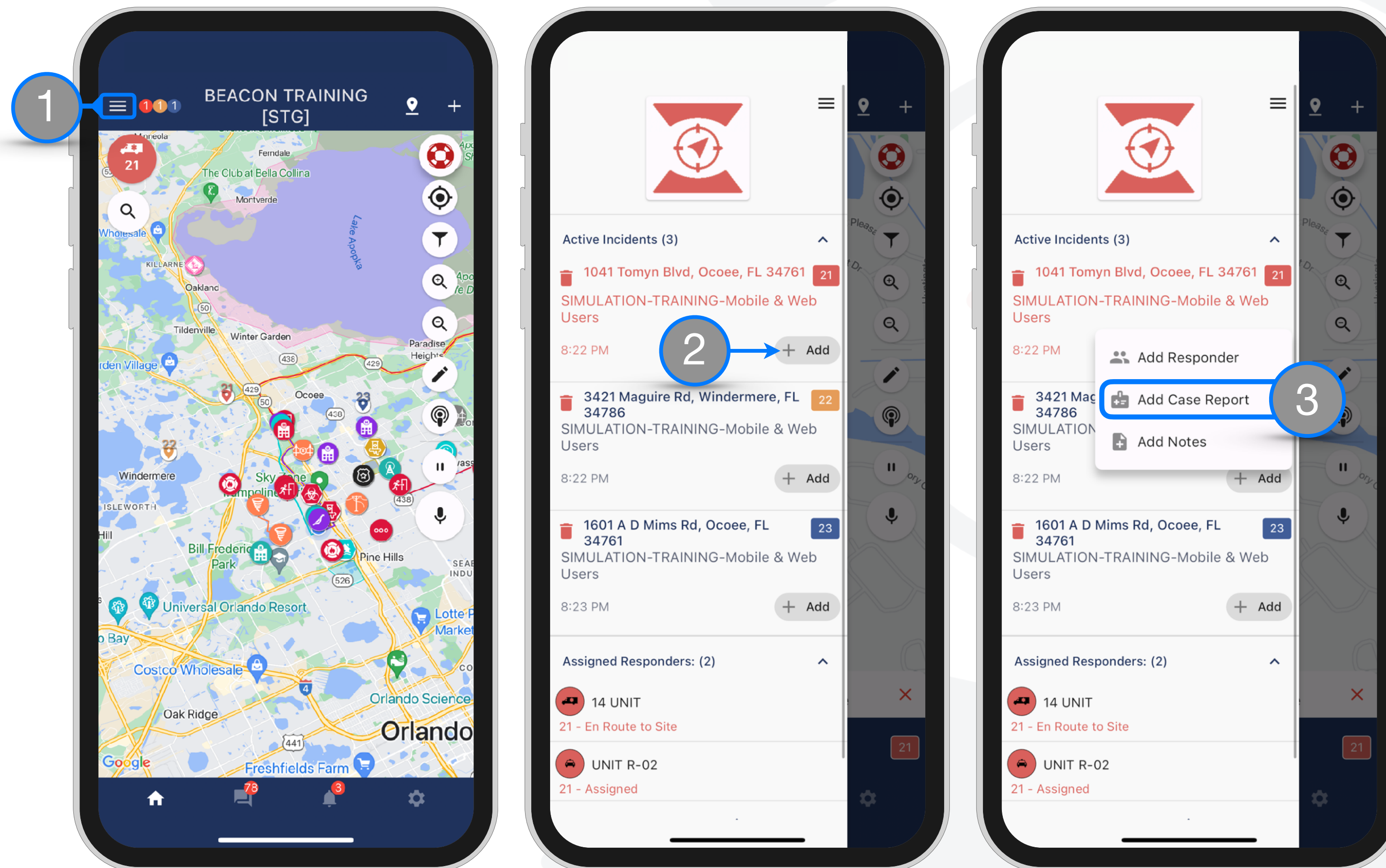
2. Responder Resources Reporting - Documentation

2.2. Case Reports

2.2.1. Accessing Case Reports Interface

Mobile app users can access the Case Report interface through the mobile app in different ways.

A. When Currently Assigned to an Active Incident



A. When a responder is currently assigned to an active incident:

1. Form the Home Screen, open the **Sidebar**
2. Locate the incident you are assigned to and press **+ Add**
3. Press **+ Add Case Report** from the list

*** Additional Notes:

- Users can only create Case Reports for incidents they have been assigned to
- Email and password will always be required for mobile app users each time they **create**, **amend** or **view** a Case Report

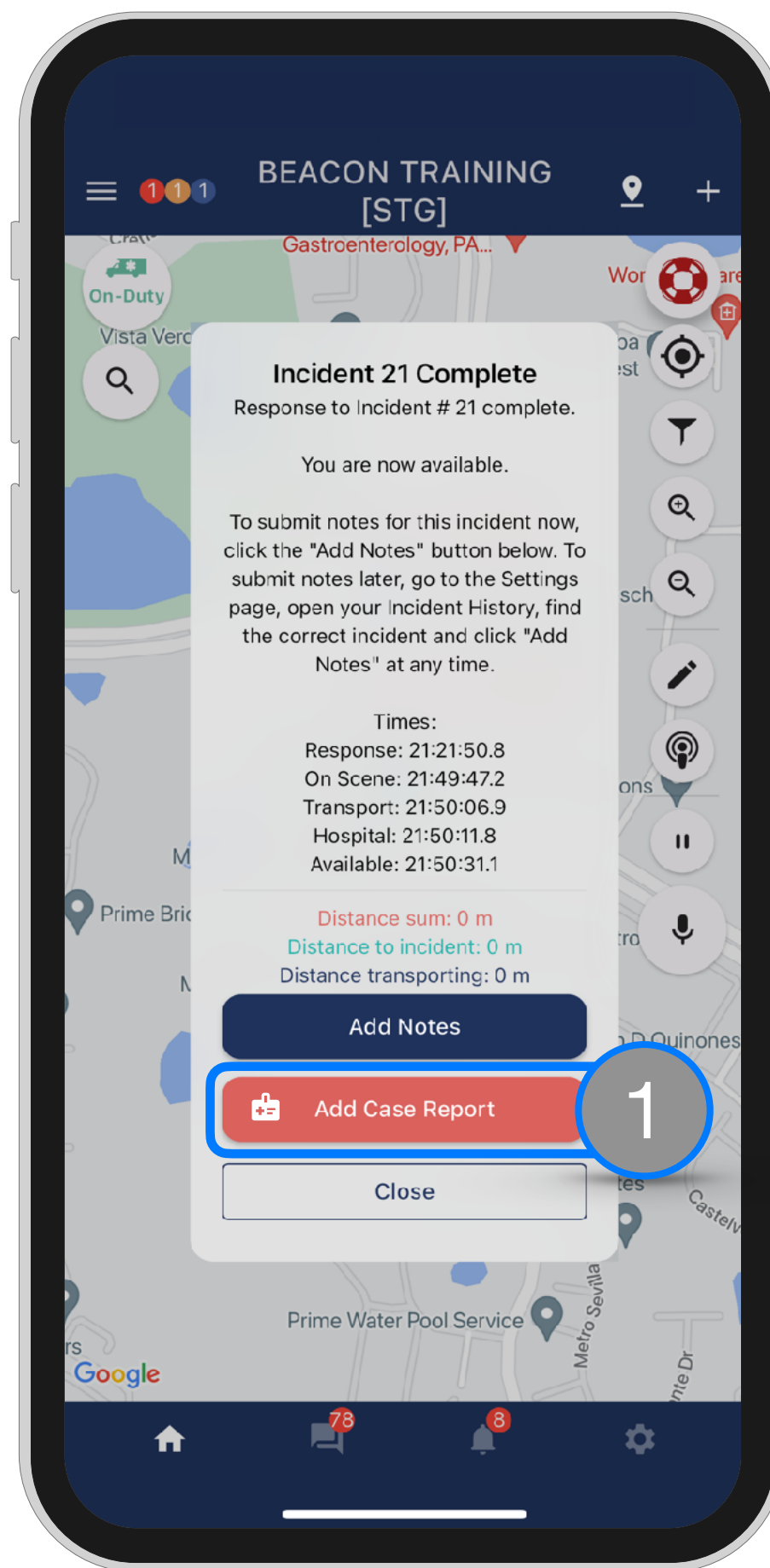


2. Responder Resources Reporting - Documentation

2.2. Case Reports

2.2.1. Accessing Case Reports Interface

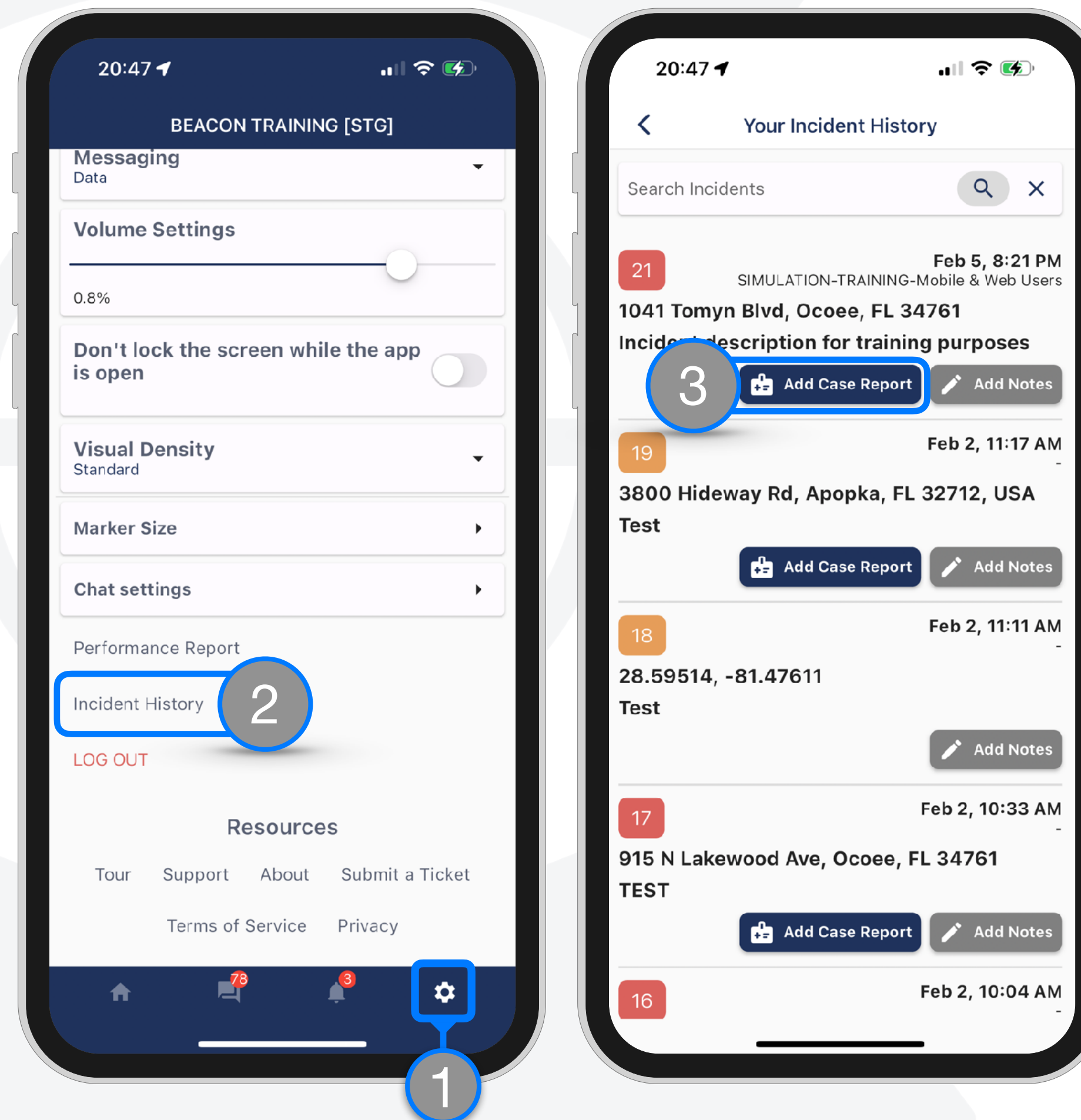
B. When an Incident is Completed



B. When the responder completes the incident they will get the Incident Summary:

1. Scroll down if needed and press  **Add Case Report** from the options

C. Through the Incident History



C. The Case Reports feature will always be accessible through the Incident History:

1. Press the **Settings** icon on the bottom navigation bar
2. Scroll to the bottom and press on **Incident History**
3. Locate the specific incident and press  **Add Case Report** button

*** Additional Notes:

- Users can only create Case Reports for incidents they have been assigned to
- Email and password will always be required for mobile app users each time they **create**, **amend** or **view** a Case Report



2. Responder Resources Reporting - Documentation

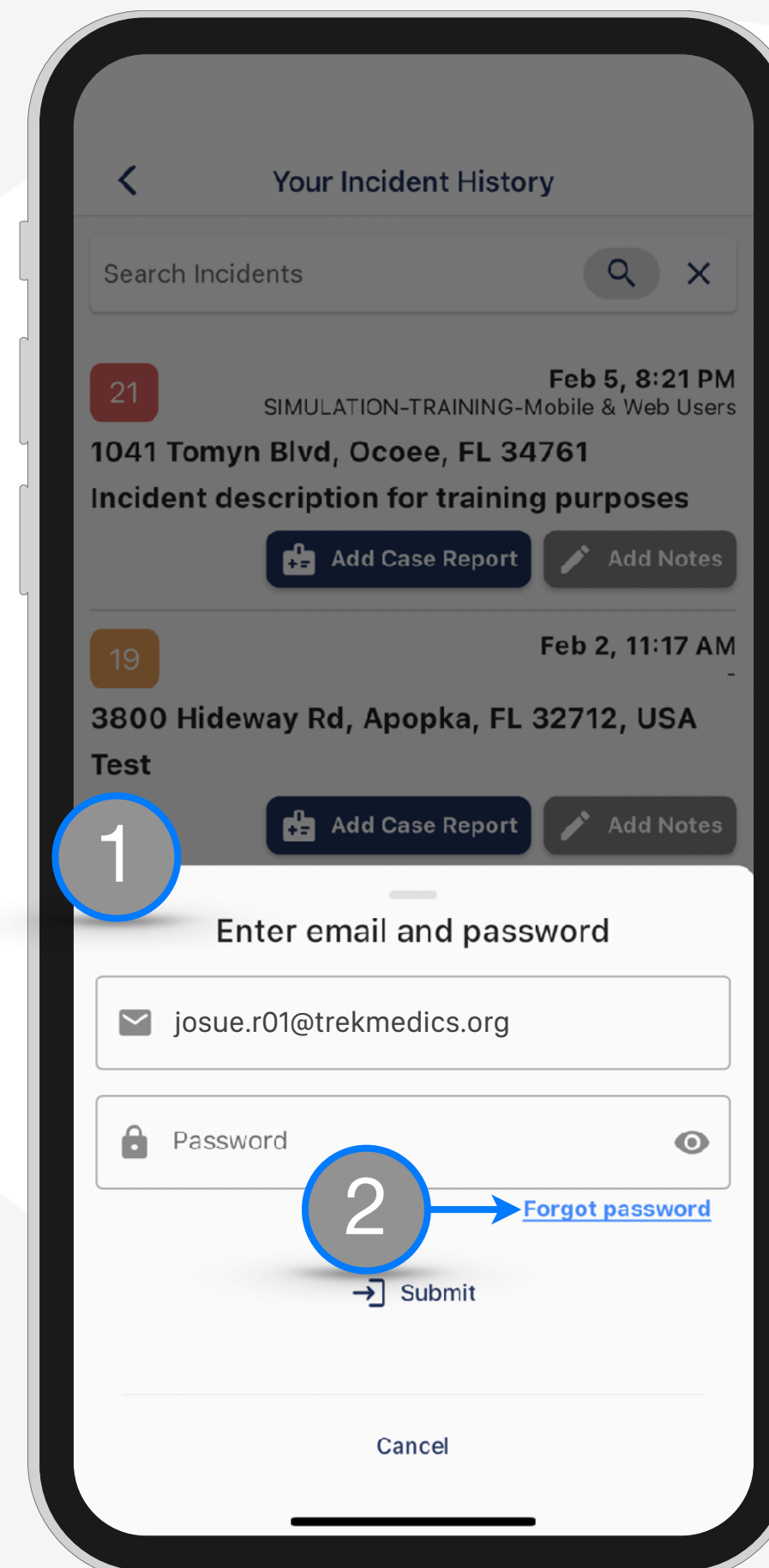
2.2. Case Reports

2.2.2. Creating Case Reports

Mobile app users can create Case Reports through the mobile app for incidents that they have been assigned to.

To add, edit or view a Case Report, mobile app users first verify their identify through the Log In interface:

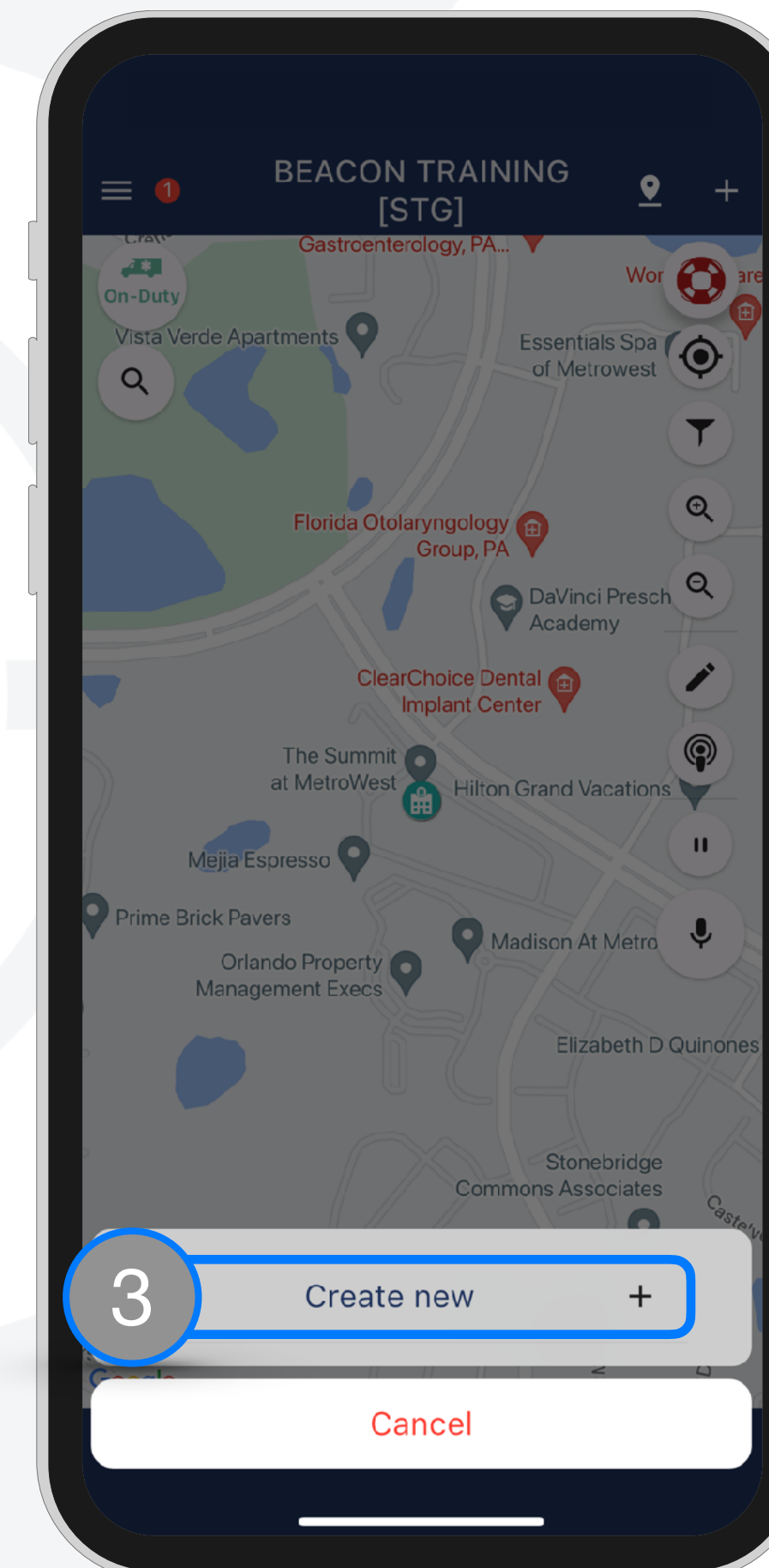
1. **Log In** using the email and password that was registered.
2. **Forget Password** — Use this feature to send a password reset link to the user registered email. The correct email must be entered on the email field in order for the process to complete
3. After a successful Log In press the **Create new**  button that will be displayed
4. This is how the **Case Report** form will look initially before completion.



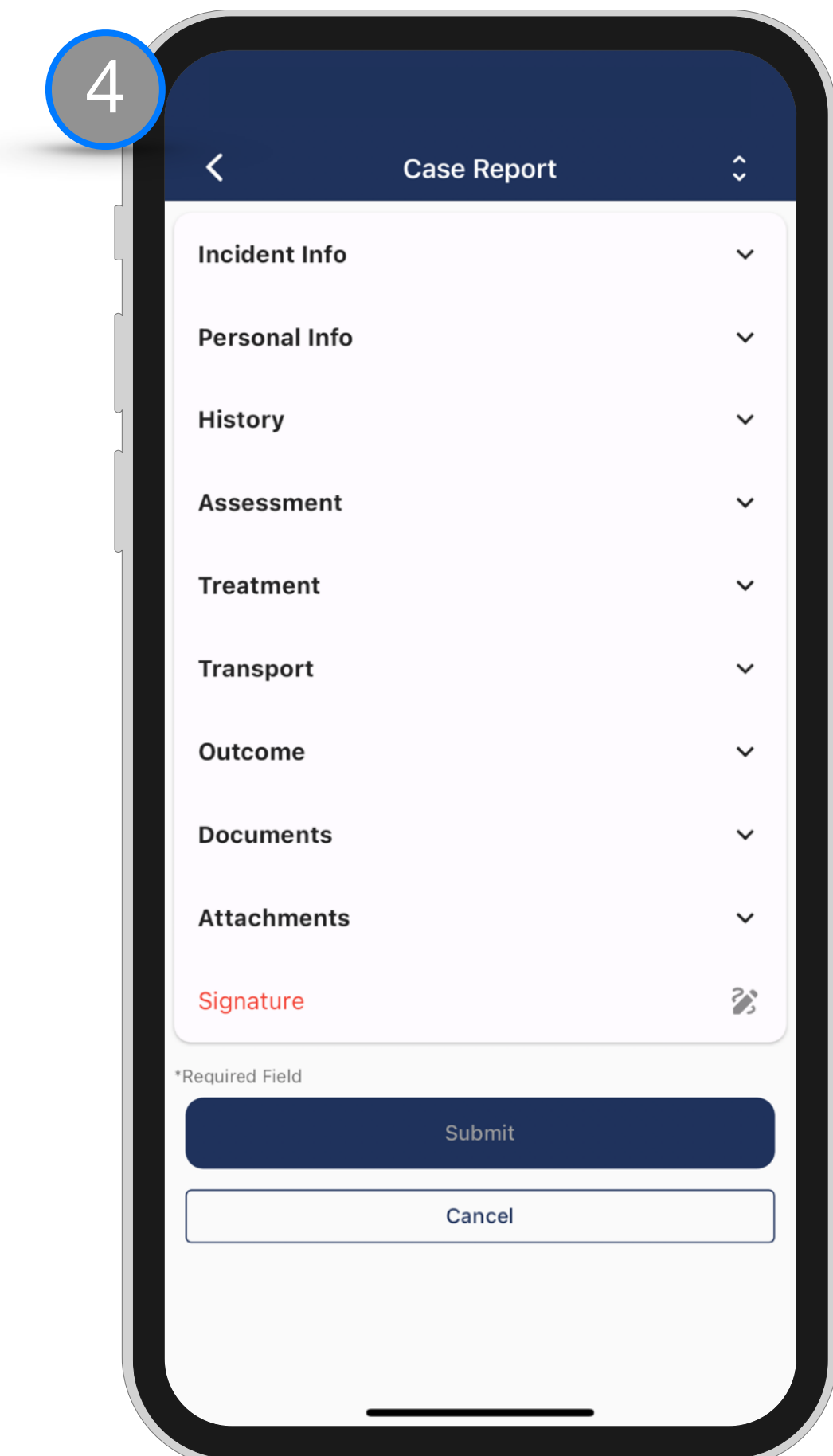
1 Enter email and password

2 Submit

[Forgot password](#)



3 Create new



4 Case Report

Incident Info

Personal Info

History

Assessment

Treatment

Transport

Outcome

Documents

Attachments

Signature

*Required Field

Submit

Cancel

*** Additional Notes:

- Users can only create Case Reports for incidents they have been assigned to
- Email and password will always be required for mobile app users each time they **create, amend** or **view** a Case Report
- **In compliance with HIPAA privacy standards, no patient data is stored on mobile devices. Exiting the Case Report will clear all fields so users should be sure to Submit a Case Report before exiting the feature**



2. Responder Resources Reporting - Documentation

2.2. Case Reports

2.2.2. Creating Case Reports

Mobile app users can create Case Reports through the mobile app for incidents that they have been assigned to.

The **Case Report** form has ten (10) main sections to capture information including a signature requirement:

1. **Incident Info** — This section includes: Responder Name, Incident Address, Location Type and Severity. It includes automatically captured information from the Incident Details
2. **Personal Info** — Here you can add **Personally Identifiable Information (PII)** details about the person a responder is providing services to
3. **History Info** — An open text field which allows users to document the history of the incident and/or patient
4. **Assessment** — includes **Signs & Symptoms** and **Psychological Presentation** subsections to document vital signs and other common observable assessment findings along with some guided open text fields to continue **PHI** capture
5. **Treatment** — Use this to document medical interventions (mostly applicable to EMS)
6. **Transport** — Includes automatically captured information from the Incident Details if a **transport incident workflow** has been completed. Manual input is also possible
7. **Outcome** — Includes guided open text fields: **Referral, Disposition, Safety Plan**

*** Additional Notes:

- Users can only create Case Reports for incidents they have been assigned to
- Email and password will always be required for mobile app users each time they **create, amend** or **view** a Case Report
- Some of the information automatically included by Beacon will be editable
- **In compliance with HIPAA privacy standards, no patient data is stored on mobile devices. Exiting the Case Report will clear all fields so users should be sure to Submit a Case Report before exiting the feature**

8. **Documents** — Custom Documents uploaded through the Web App will be available here for responders to access and download
9. **Attachments** — image and file attachments can be uploaded and saved here
10. **Signature** — A signature will **always be required** in order to submit a Case Report. Press on the field to Sign and Save. The signature will be added to the attachments section when successfully captured
11. **Submit** — This button will activate when all **Required Fields** are complete. Please submit a Case Report before leaving the interface as this will save the information and allow the user to come back to **Amend Case Report** 
12. **Cancel** — Closes the Case Report and information entered on the form related to the session will be lost if not submitted — this is to prevent unauthorized access and storage on devices
13. **Back** — Use this button to go back. Note that all information will be lost if the user goes out of the Case Report interface without a successful submit
14. **Expand / Collapse All** — Pressing this button will expand or collapse all sections at once



2. Responder Resources Reporting - Documentation

2.2. Case Reports

2.2.3. Amending Case Reports

Mobile app users can Amend Case Reports  through the mobile app. This option will only be available for incidents that already have a submitted Case Report by the specific responder.

Once a Case Report has been submitted a responder can submit Amendments to add or correct information from the previous submission.

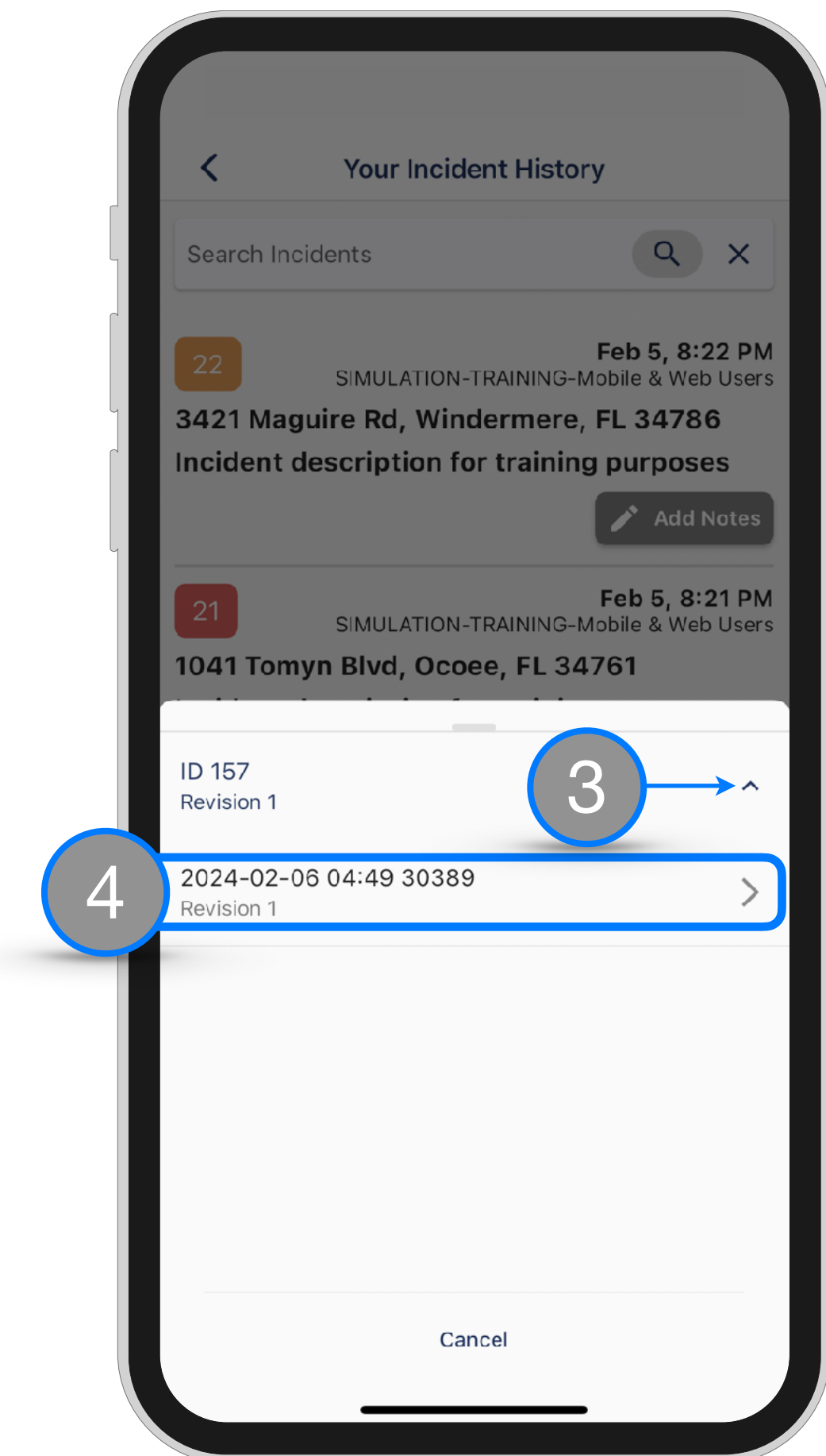
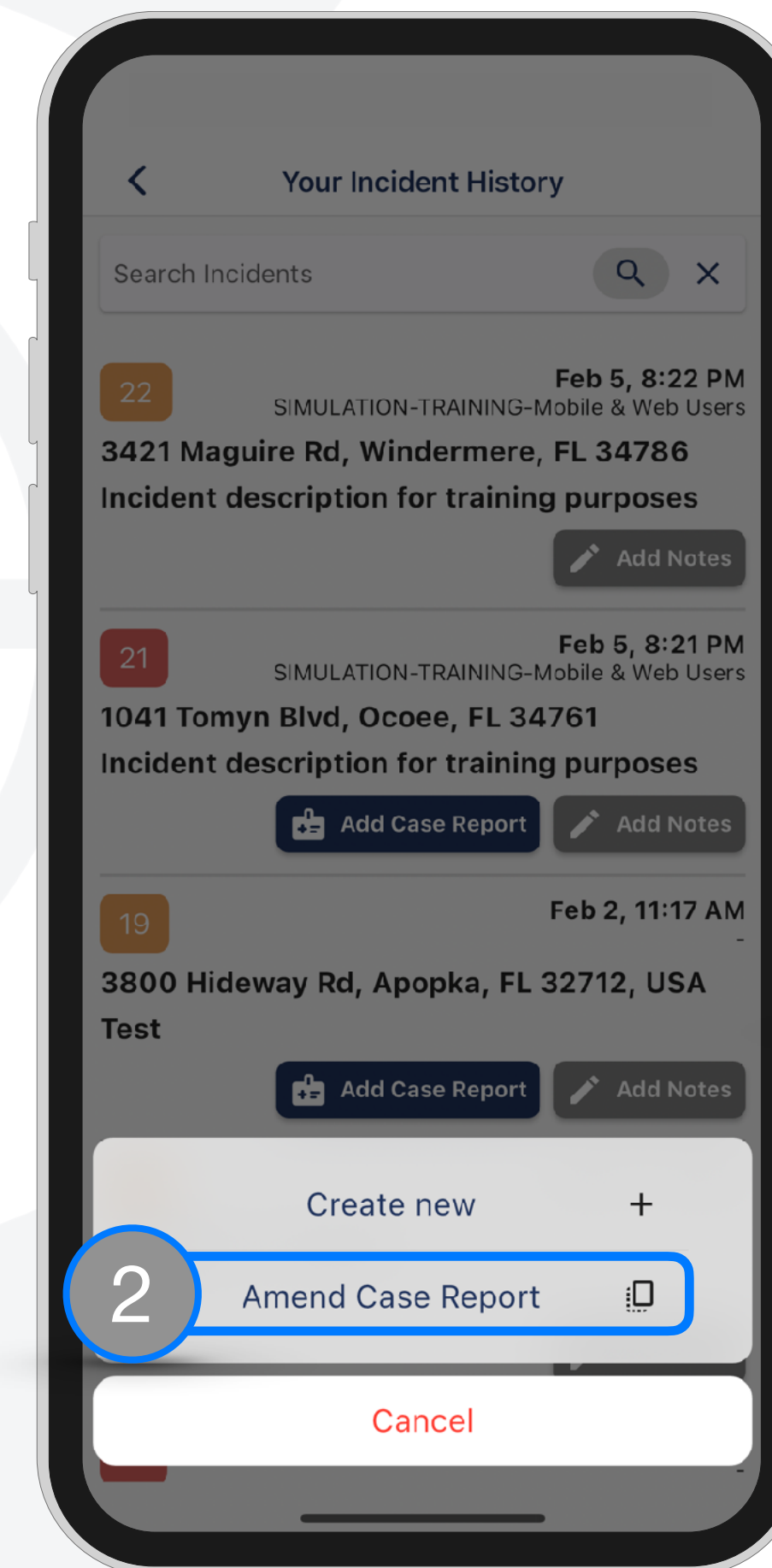
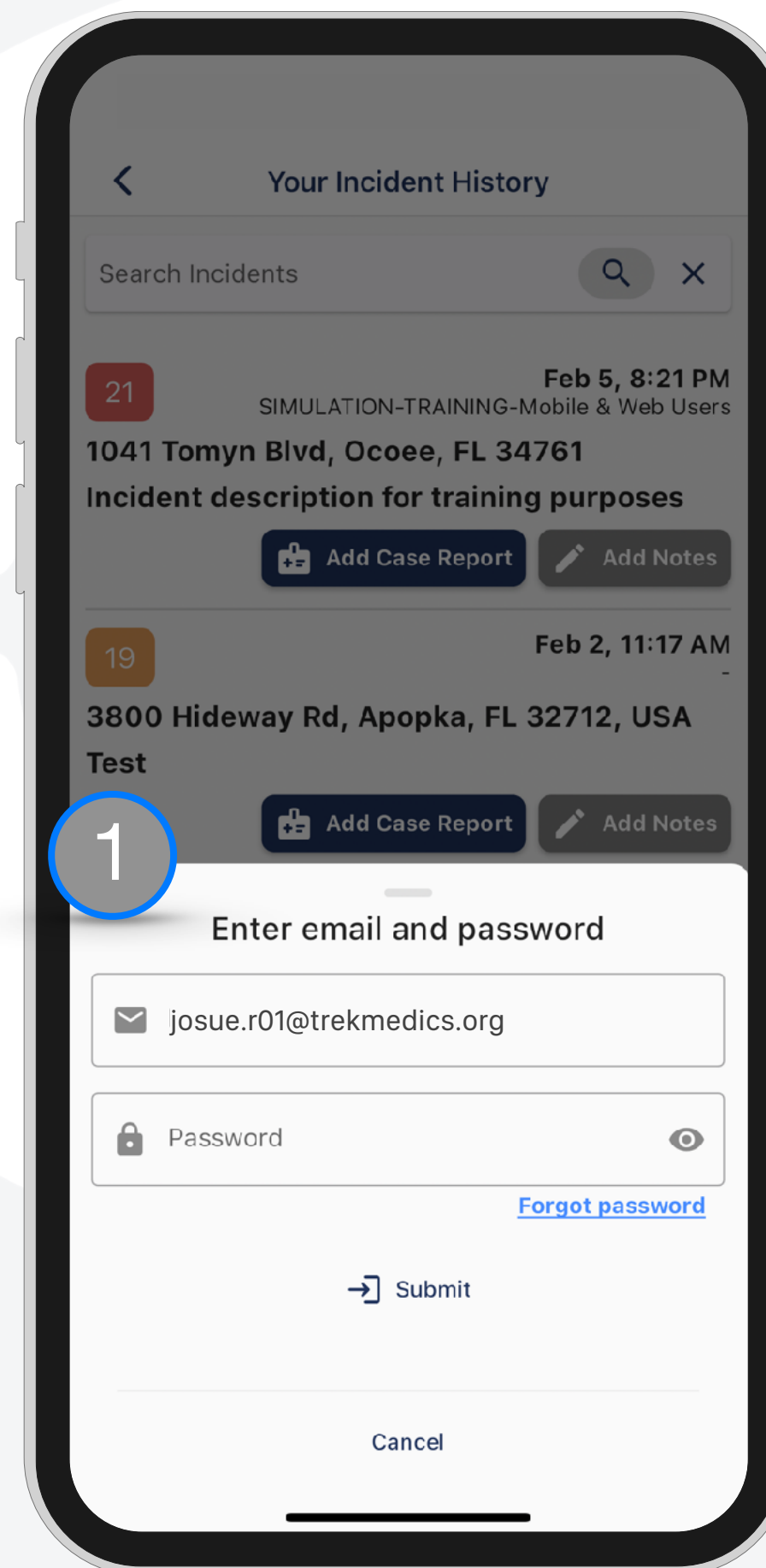
To Amend A Case Report:

1. Locate the incident and press  **Add Case Report. Log In** using the email and password that was registered.
2. Press the **Amend Case Report**  button that will be displayed
3. Expand the menu to show the revisions. If multiple **Amended Case Reports**  have been submitted a Revision will be displayed for each
4. Select the Revision you would like to Amend 

IMPORTANT: Amending a Case Report does not overwrite the original submission. Amending a Case Report allows you to add information or make corrections, but previously submitted information will not be deleted. Amendments can be made as many times needed and will be displayed along with the original submission in the Case Report printout file, along with User names and timestamps. Make sure to Submit the Case Report.

*** Additional Notes:

- Users can only create Case Reports for incidents they have been assigned to
- Email and password will always be required for mobile app users each time they **create, amend** or **view** a Case Report
- Once a Case Report has been submitted the information cannot be deleted
- The **Amend Case Report**  feature can be used as many times needed
- A **Signature** is required for each Case Report or Amendment submission
- **In compliance with HIPAA privacy standards, no patient data is stored on mobile devices. Exiting the Case Report will clear all fields so users should be sure to Submit a Case Report before exiting the feature**





2. Responder Resources Reporting - Documentation

2.2. Case Reports

2.2.4. Documents & Attachments

Custom Documents uploaded through the Web App will be available for Responders to use when creating a Case Report

When the agency has uploaded custom documents they will be available under the Documents Section:

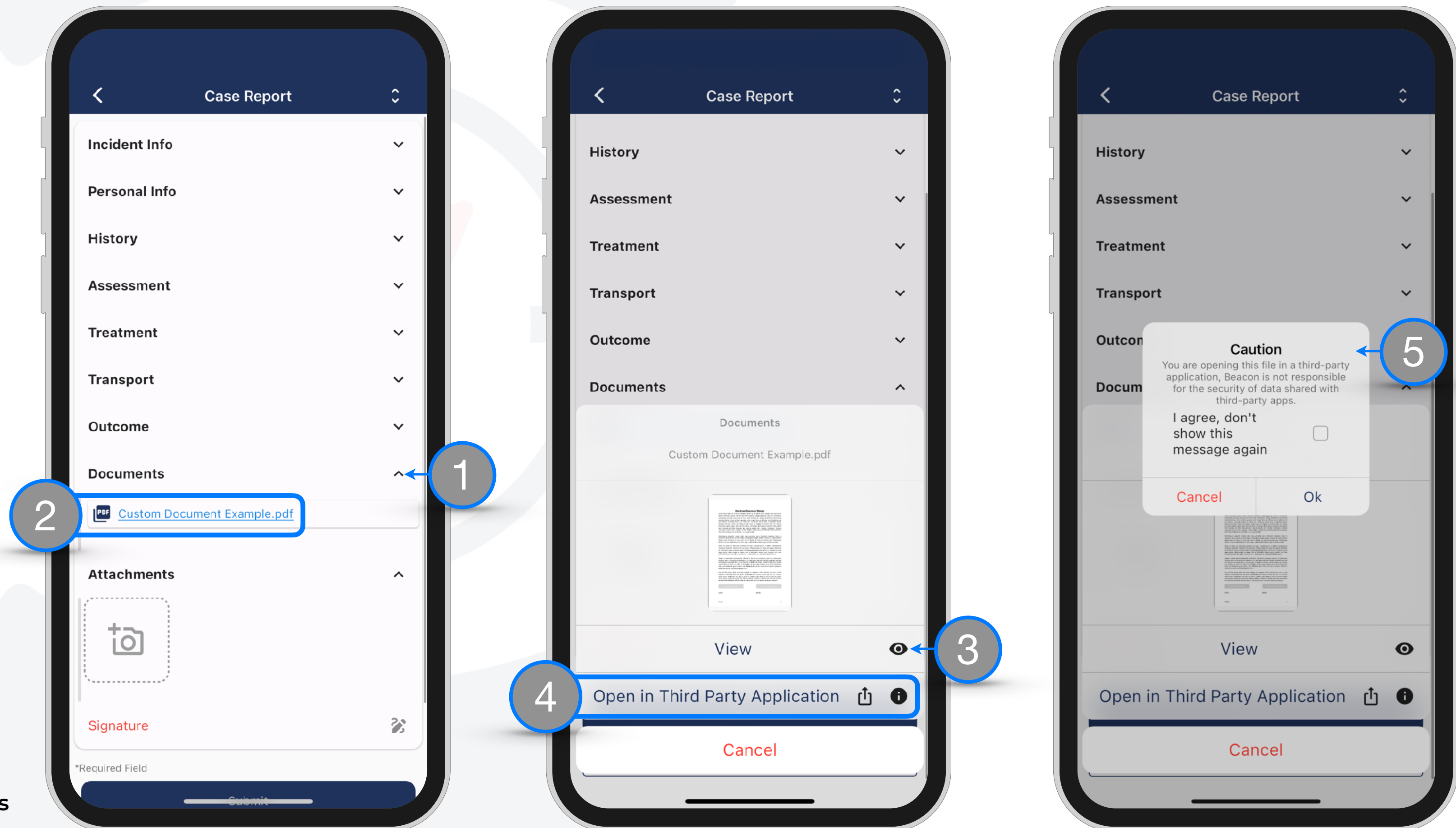
1. Locate the **Documents** section and expand to display the list of documents
2. Press on the desired document to view the options available
3. Press the Eye icon to show a pre-view screen of the document
4. **Open in Third Party Application** — press this button to open the document on any installed application that will allow you to edit / fill the document
5. A disclaimer message will appear. Agreeing by checking the box is required to continue

***** IMPORTANT *****

Beacon is not Responsible for the security of data shared with Third Party Applications

6. Once the document is complete, it will need to be retrieved as a file attachment from the device.

Continue to the next page to learn about Adding Attachments





2. Responder Resources Reporting - Documentation

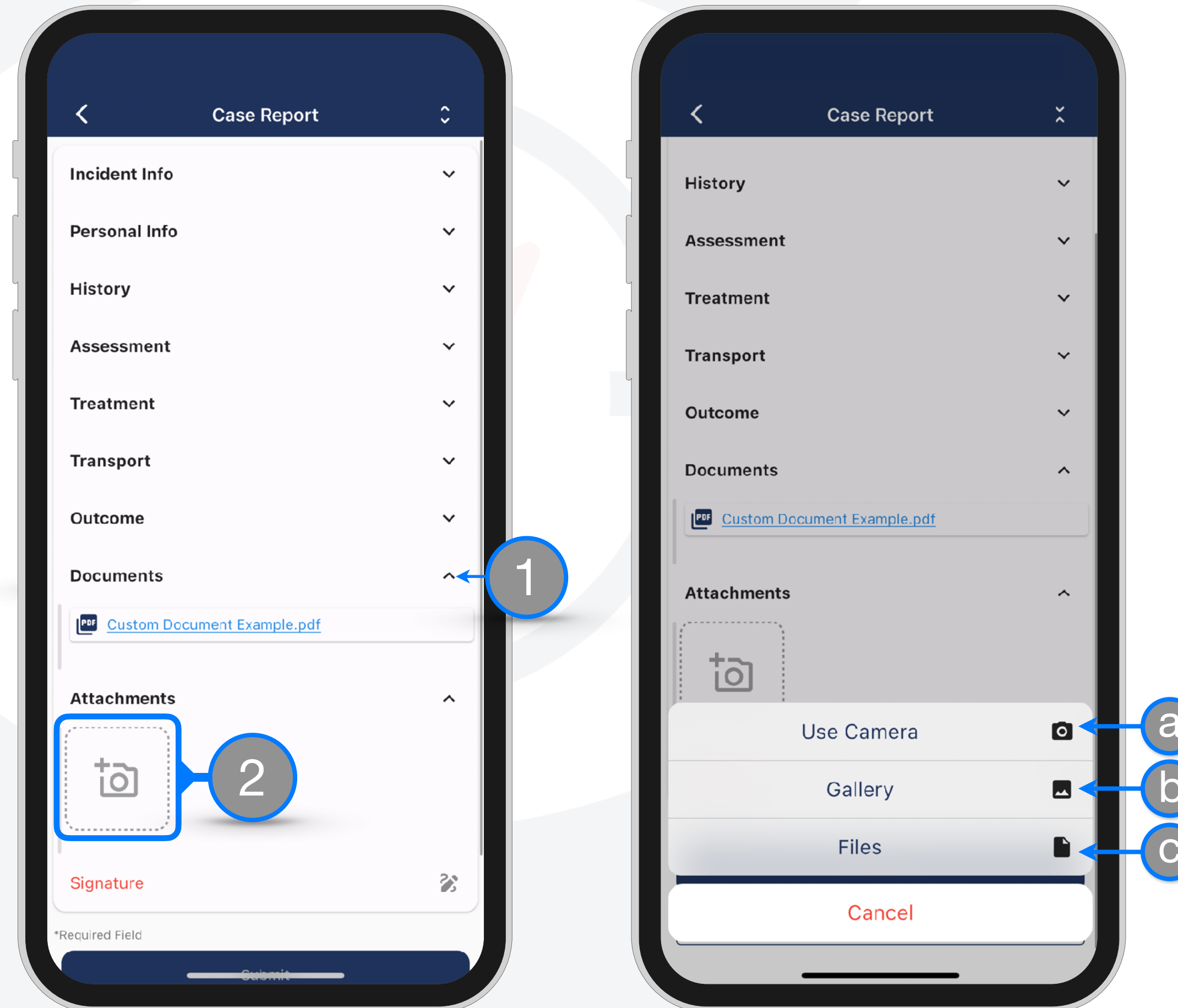
2.2. Case Reports

2.2.4. Documents & Attachments

Responders can include attachments when creating a Case Report 📎

Responders can manually upload attachments to be included with the Case Report:

1. Locate the Attachments section and expand
2. Press the add attachments button to display options available:
 - a. Use Camera — Allows the camera to capture an image without the need to go out of the app (permission to use the camera should be granted)
 - b. Gallery — Allows user to select an existing image from the device gallery
 - c. Files — allows to browse and select files located on the device.
If using the Custom Documentation feature with a Third Party App as described on the previous page, this step is needed to locate the file and upload it into the Case Report



*** Additional Notes:

- Attachments will be appended to the Case Report and available to download from the Beacon Web application by authorized users.