



Attaching a Document in a PEER Event

General Information:

If attaching a document in PEER, please be sure to follow your organization's policies/guidelines regarding what should and should not be attached in an event file, including whether you need prior authorization/review before attaching the document. If you are unsure if a document should be attached, please contact your Risk Manager.

If attaching a photograph in PEER, we recommend that the individual authenticate the information in the description space in case it's needed later for litigation purposes. Without authentication, it may be very difficult to have the photos admitted into evidence.

To authenticate the photo(s), please do the following: indicate who took the pictures; indicate the date and time they were taken; indicate the number of photos taken; and state what the photos depict, i.e., "Photo 1 shows the area of the sidewalk that the resident was found on when I arrived at the scene."

For File Submitters/File Managers using the Attachments section:

1. Scroll down to the Attachments section and click the Add button on the menu bar
2. Browse to select file and click "ok."

Attachments
Open | Add | Edit | Remove

FileName	Category	Description
Not Specified		

3. Attachment will show in table with description.

Attachments
Open | Add | Edit | Remove

FileName	Category	Description
<input type="checkbox"/>	1 GENERAL GUIDELINES FOR EVENT IN...	

For File Managers attaching documents/photos in a Follow-up Action:

1. Open file
2. Click on a Follow-up Action – Work Done on File
3. Select Sub-Type (we suggest "Other" but you can pick any Sub-Type)
4. Scroll down to description –type in "attachment" so that you know which follow-up contains the attachment
5. Scroll down to Attachments section of follow-up action (this field is present in all follow-up actions)



6. Click Add (in blue) to add the attachment in the follow-up and click browse to find the file on your computer
7. Find the file on your local drive and click Open
8. Add a description of the document if you want (DOH report for this example)
9. Click “Ok” and the attachment will show in the list
10. Click “Ok” on your follow-up and the document is now saved in the follow-up

Follow-ups

<input type="checkbox"/> Type	Sub-Type	Followup By	Followup To/With	Date	Description
<input type="checkbox"/> Work Done o...	Consultation ...	Jennifer Sheckells	Nancy Martin	07-17-2012	<p>Changed speci...
<input type="checkbox"/> Work Done o...	Clarification: ...	Nancy Martin			dent stated...
<input type="checkbox"/> Work Done o...	Consultation ...	Christina Wildrick			is event re...
<input type="checkbox"/> Work Done o...	Task Comple...	Nancy Martin			notification ...
<input type="checkbox"/> Work Done o...	Other	Jennifer Sheckells			nent

Modify

Delete



11. Click Save & Exit and the document is now saved in the event file

To view Attachments in the event files:

- Click Summary and Current Summary on the left side of the screen and scroll to the Attachments section or the follow-up section. The attachment will show as a link in blue. Click on the link and it will open the attachment.
-OR-
- Open the follow-up action where attachment is located, scroll down to the Attachments section, select the attachment, click Open from the menu, and the attachments will show.
-OR-
- Go to the Attachments section, select the attachment by clicking the radial button next to the attachment, and click Open