Cheat Sheet – File Manager

Note: Your username is usually your first initial and last name. Your Risk Manager will notify you if this is not how your username is configured. Your password is to be kept private. The first time you log in, or any time your password is reset, use the word "password" as your password and PEER will prompt you to create a new password.

- **Before you start an event form** in the software, please have the resident chart/information, care plan/support plan (as applicable), notes from any investigation done when the event was discovered and the resident's statement of what happened.
- **Enter website** using your username and password.
  - Go to **icon wall** and click the icon to open the event form you need to report. The icons also tell you the name of the event report form. If you do not like using the icons, there is a list of all event forms below the icons – select the one you want by clicking the event form name.
  - If you are unsure, click into the Search to the left of the icon and type in what you are looking for (scooter, theft, etc.) and the form where it appears will show up.
- **Hovering** over questions/fields listed on the form will often give you further information or a definition of what is needed.
- Please **do not use all caps** when entering information into text fields such as brief factual description. Some fields (first/last name) automatically create all caps and this is okay.
- **Military time** is used for all time entries. A guide for military time is at the end of this document.
- If you are **called away** in the middle of entering an event, save as incomplete and note the file number to go back to later. The event form must be completed before you leave your shift.
- To **re-enter an incomplete file**, go to the Info Center (clipboard on the top left side) and find your file number. You can look under Incomplete Files and then click the box and click "Open" above.
- All questions with a green asterisk are **mandatory**. The file cannot be submitted until all mandatory questions are answered.
- If you **unsure what you should put in a response**, hover over the question and a definition/description will appear above.

- **Specific Event Types** – This gives you an idea of where you can find certain event types:
  - Skin/Tissue – Bruises or skin tears of known or unknown origin; cuts; lacerations; blister; burn; pressure areas or injury

  - Safety/Security/Conduct – Animal bite; choking; lost health record/ chart; abuse or neglect; property lost; resident left AMA; suspected theft; bleeding- nose/ other B/P problem; C/O pain, chest pain, heart attack, dizziness, SOB, nausea/ vomiting; confused/ change in mental status; MV or scooter accident.
  - Environment – Bed malfunction; computer issue; spill chemical/ other; telephone malfunction/ down; water leak/ flood; fire/smoke condition; chemical fumes
  - Lab Test/Diagnostic Test – Collection issue; lost specimen; lost results; quality control issue; turnaround time issue
  - Diagnosis/Treatment – Discharge issues; missed diagnosis; allergic reaction; consent issue.
  - Care/Service Coordination – Failure to follow order; slow/no response to call light.
  - Medication/Fluid Error – In addition to basic error: recalled or expired medication; incorrect narcotic count; omission; resident refusal of medication; transcription error; wrong label.
- **Sections to complete guide** – Sections listed below may not be in all event forms.
  - General Event Type
    - ✓ Classification of Person Affected – If more than one person is involved in event, separate events must be entered; use Submit and Copy in the More Actions button on the bottom and the second event will open up with all the details. Then change the names, and other pertinent data.
    - ✓ Injury Incurred – Must select "yes" for Injury Details section to appear; ANYTIME A RESIDENT IS SENT TO THE ER YOU MUST SELECT YES AND COMPLETE INJURY DETAILS, TO THE EXTENT THEY ARE KNOWN. A resident without an injury or suspicion of an injury would not be sent out to the hospital.
    - ✓ Equipment Involved/Malfunction – If it is suspected that equipment malfunction or misuse contributed to or caused event, must select yes for Equipment Details section to appear.
  - Person Information – This is information about the person affected by event/near-miss. If person affected is a resident, see organization's policy on whether you must complete address information.
    - ✓ If Admission Date is entered, it indicates the date of admission to the current level of care, not when resident may have first moved into community.
  - Event Details
    - ✓ Location lists are built specifically for your organization. If you cannot find the location of the event in your drop down lists, contact your Risk Manager for assistance.
    - ✓ Prepared By – Is the person ENTERING the event Full name and title are both required.
    - ✓ Name of Reporter – Is the person who reported the event to the preparer (may both be the same).
    - ✓ Reported Date/Time – Must be changed if an event isn't entered into the system immediately after being reported.
    - ✓ Witness Information – This is for an EYEWITNESS only. Click "Add" below table to enter information, if applicable.
  - Specific Event Details – Questions related directly to event type you selected will appear.

  - ✓ Reported Event Severity – If you are unsure of the severity, always adjust to the higher suspected severity level. This can be adjusted by a File Manager later in the process if it is incorrect or has changed.
  - ✓ Brief Factual Event Description – This is one of the most important fields to complete. Be sure to include factual and objective information on:
    1. How you came to learn of the event. How were you notified of the fall, etc.?
    2. What person who reported/witnessed event observed. Factual information only, please.
    3. What resident/person affected stated happened during/to cause event. What the resident said about how the event happened must be included. If resident is unable to provide information about event, this should be noted.
  - ✓ Investigation Of Area Performed? - A details box appears if you selected "Yes" that an environmental investigation was performed; provide details related to environment and visual observation of event location.
- o Injury Details – This section only populates if "yes" is selected under Injury Incurred question.
  - ✓ Degree of Injury – make sure that your selection is consistent with the Reported Event Severity.
  - ✓ Nature of Injury – you may select more than one type of injury if applicable (i.e., bruise and fracture).
  - ✓ Resident Care Interventions – asks if interventions were put in place; very brief choices so that a non-clinical staff member can complete if necessary.
  - ✓ Clinical Findings Notes – if you are a clinical staff member, enter the details of what you found (i.e. "ROM WNL" or vital signs that were taken or if you are either clinical or non-clinical, you can state "refer to the resident record for further details".
- o Equipment Details – This section only populates if "yes" is selected under Equipment Involved/Malfunction question.
  - ✓ Click "add" in green under table to enter information about suspected or known equipment malfunction.
    1. If the Equipment/Device Type is not listed, talk to your Risk Manager for referral to FSA team.
- o Notification – This section is used to indicate all individuals notified about event, depending on organization policy.
  - ✓ Click "Add" under table to enter information about individual notified.
  - ✓ Remember to use military time for Time in notification table.
  - ✓ In the notes section, indicate relevant information, such as if you left a message, if you spoke to the person and what they stated, if you faxed something to the MD, etc.
  - ✓ To modify an existing entry, click on the box next to name in table and click "modify" in green to modify information.

- Once you have **completed all the mandatory fields**, review the form again and click submit. Once the file is submitted, the proper alerts will be made to individuals identified in your organization. Follow your organization's policies for additional notification or investigation guidelines.
- If you are **unable to complete all the mandatory fields**, select More Options at the bottom of the page and Save As Incomplete. Note the file number so that you can go back into the Info Center to complete the event form prior to leaving work.

File Manager Specific Information

- **File Manager abilities** within the software have been determined by your Risk Manager. If you are unable to perform any specific functions or see an event file, please talk to your Risk Manager.
- **Re-enter a file** (for follow-up, to sign off or to review) – find the file using one of the choices below, click event in the File Name box and it will open. You can also select the event by clicking the box next to it and clicking "Open" from the menu above. Or, instead of Submit, you can go to the More Actions button on the bottom and select Submit and Manage and the file will immediately reopen for you to add the Follow up Action.
  - Info Center (clipboard)
    - ✓ File Browse – can use to find a recent event file within your scope; or it may be in a Personal View if you have set that up.
  - Search widget (magnifying glass)
    - ✓ Can search by typing word/name into box or clicking downward triangle to access saved searches, field search and advance search pop-up box.
    - ✓ Can run a search and save (i.e., falls) to run again in the future.
- **Follow-up Actions** – once file has been opened, Follow-up Action button is on the top left side of the screen. Most common Follow-up Actions are:
  - Work Done on File – select this Action if there has been work done such as an investigation, meeting with family, or policy/procedure or chart review.
  - Review – select this Action if there has been a review of the file but no specific actions yet.
  - Sign-off – select this Action if your workflow process requires a sign-off by particular individual(s) before file can be closed.
  - Once Follow-up Action is clicked and the box opens, select appropriate sub-type and complete section as indicated.
  - If you want to notify a particular person via e-mail that follow-up has been placed in the file, click the "e-mail" menu item located above description text box. See specific documentation for setting up email functionality.
- Only **change information** in the initial event form (not follow-up) <u>IF</u> there is a valid and documented reason why it should be changed. There is a very detailed audit trail within the software that can be

questioned in the future if there is not a very good reason for the change. If you change or add information to event file, add your name to the Prepared By entry in the Event Details section or, if the change is significant, note that a change was made in a Follow-up Action note.

Military Time Guide – For evening hours, add 12 to the number. See examples below:

1:00 am	→	01:00	3:00 pm	→	15:00
2:00 am	→	02:00	4:00 pm	→	16:00
9:30 am	→	09:30	5:00 pm	→	17:00
10:44 am	→	10:44	6:45 pm	→	18:45
11:00 am	→	11:00	7:25 pm	→	19:25
Noon	→	12:00	8:00 pm	→	20:00
1:00 pm	→	13:00	9:15 pm	→	21:15
2:35 pm	→	14:35	11:59 pm	→	23:59