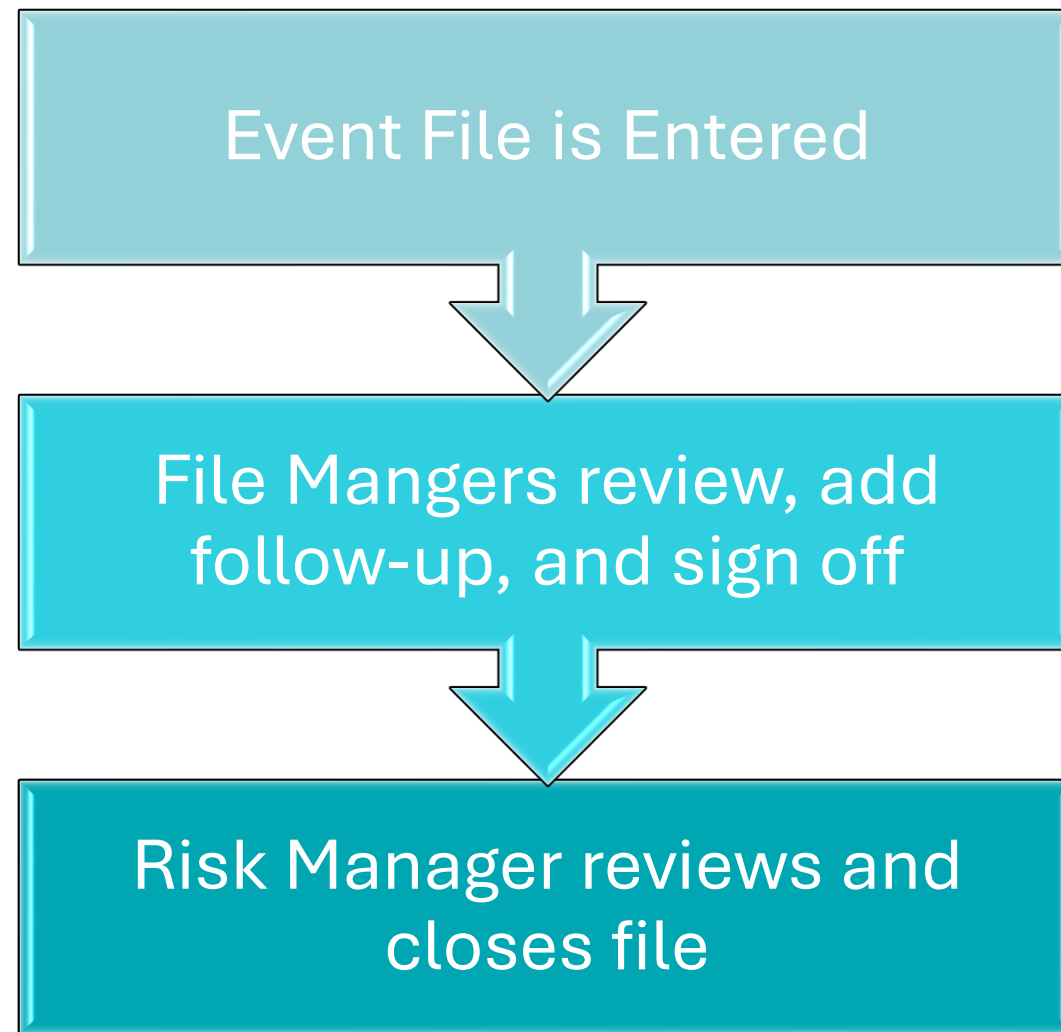

PEER Incident File Management

Workflow and Follow-up



Life of an Incident

- When a file is entered, it may be reviewed by several file managers before it reaches the Risk Manager for close
- File Managers can include the medical director, HR personnel, DON, and other managers
- In the coming slides, we'll show how to complete each of these steps





User Name:

Password:

Login

[Forgot password?](#)

Logging to PEER

Step 1:

https://rl6.rlsolutions.com/PeaceChurch_Prod/Homecenter/Client/Login.aspx

Step 2:

Enter your Username and Password

Step 3:

Click the blue "Login" button

4 Ways to Locate Events



Info Center



Email Alert



Alert View



Search

Info Center

Click on the Info Center Icon in the top left

JRLDATIX

Info Center

Alerts

Tasks

Search

New File

Folders

Reports

File Tracker

File Info Center

VIEW: FILE BROWSE

⚙️

🔄

Search

🔍

SYSTEM VIEWS

File Browse8

Incomplete Files3

PERSONAL VIEWS

Files to be signed off by me

<input type="checkbox"/>		File ID	Event Date (mm-dd-y)	General Event Type	First Name	Last Name
<input type="checkbox"/>	! 🔒	369952	09-13-2024	FALL	MICKEY	MOUSE
<input type="checkbox"/>	! 🔒	369944	08-06-2024	FALL	JANE	SMITH
<input type="checkbox"/>	! 🔒	369924	08-02-2024	SKIN/TISSUE	SNOW	WHITE
<input type="checkbox"/>	! 🔒	369921	08-01-2024	FALL	SONIA	WALSH
<input type="checkbox"/>	! 🔒	369930	08-01-2024	ELOPEMENT/WAN...	PETER	PAN
<input type="checkbox"/>	! 🔒	369942	08-01-2024	ENVIRONMENT		
<input type="checkbox"/>	! 🔒	369915	07-19-2024	FALL	WHITE	RABBIT
<input type="checkbox"/>	! 🔒	369917	07-19-2024	FALL	JANE	SMITH
<input type="checkbox"/>	! 🔒	369912	07-18-2024	FALL	JANE	SMITH
<input type="checkbox"/>	! 🔒	369914	07-18-2024	FALL	JANE	SMITH

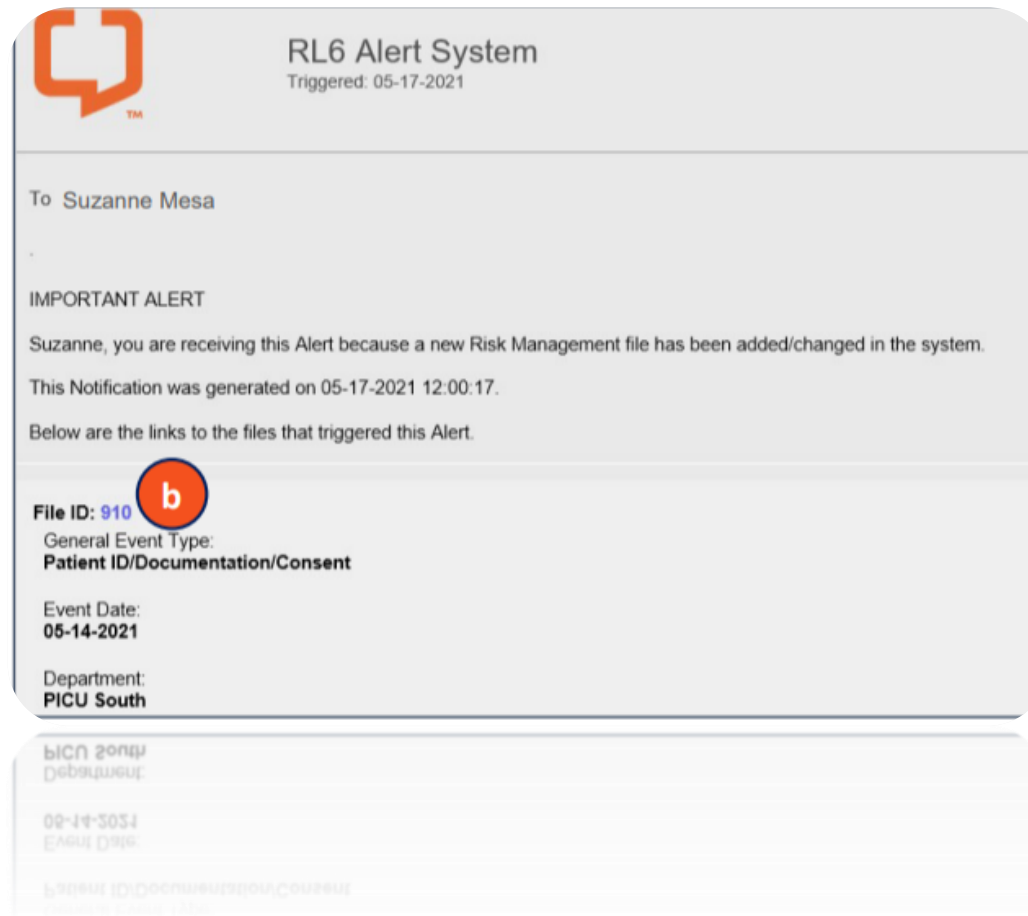
System Views

These are preset views that PEER provides. Within File Browse you will see all the files you have scope to see

Personal Views

These are views that you can create to help manage your files

FSA can help you create these views or you can create them yourself



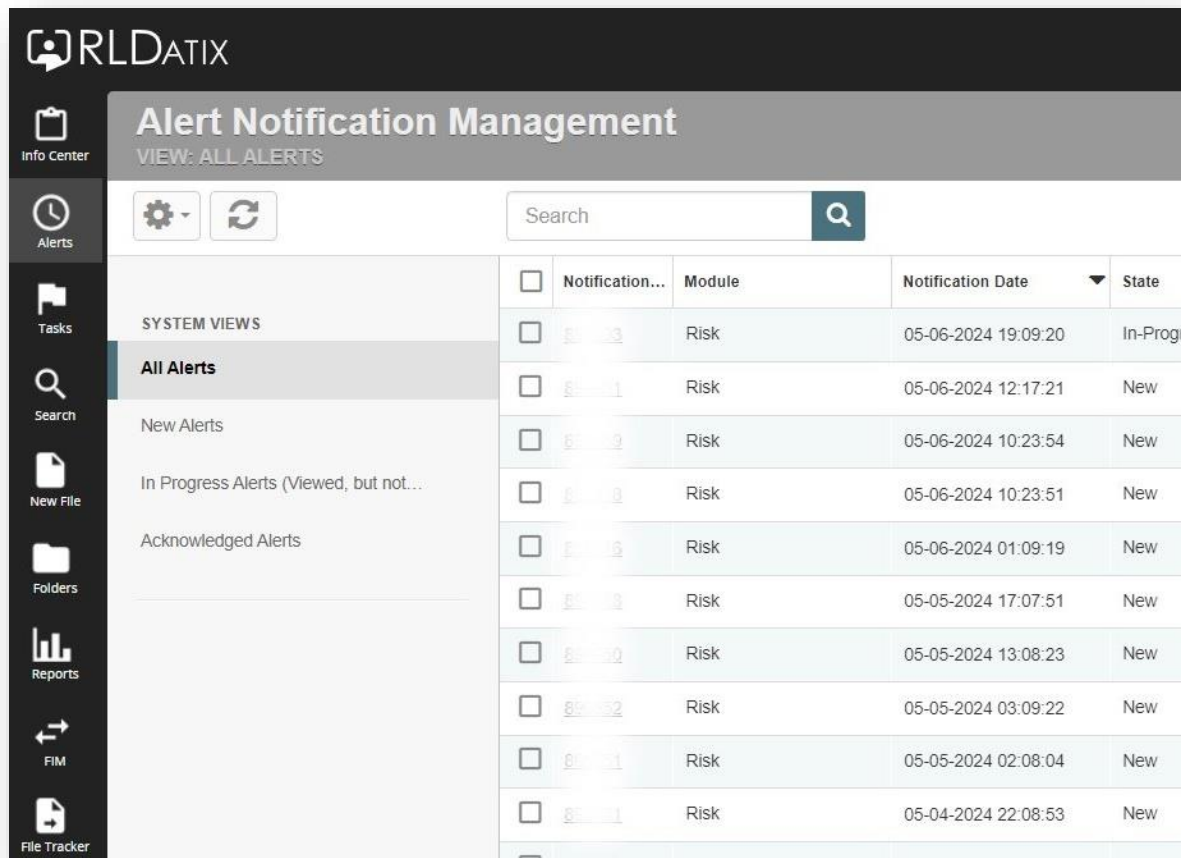
Email Alert

If alerts have been set up, you will receive an email when an event occurs that you need to manage

When you receive the alert, you'll need to click on the file id number within the email to open the event file in PEER

Alerts need to be set up by your system administrator

Alert View



Notification...	Module	Notification Date	State
<input type="checkbox"/> 88-003	Risk	05-06-2024 19:09:20	In-Prog
<input type="checkbox"/> 88-001	Risk	05-06-2024 12:17:21	New
<input type="checkbox"/> 88-002	Risk	05-06-2024 10:23:54	New
<input type="checkbox"/> 88-000	Risk	05-06-2024 10:23:51	New
<input type="checkbox"/> 88-006	Risk	05-06-2024 01:09:19	New
<input type="checkbox"/> 88-008	Risk	05-05-2024 17:07:51	New
<input type="checkbox"/> 88-000	Risk	05-05-2024 13:08:23	New
<input type="checkbox"/> 88-002	Risk	05-05-2024 03:09:22	New
<input type="checkbox"/> 88-001	Risk	05-05-2024 02:08:04	New
<input type="checkbox"/> 88-001	Risk	05-04-2024 22:08:53	New

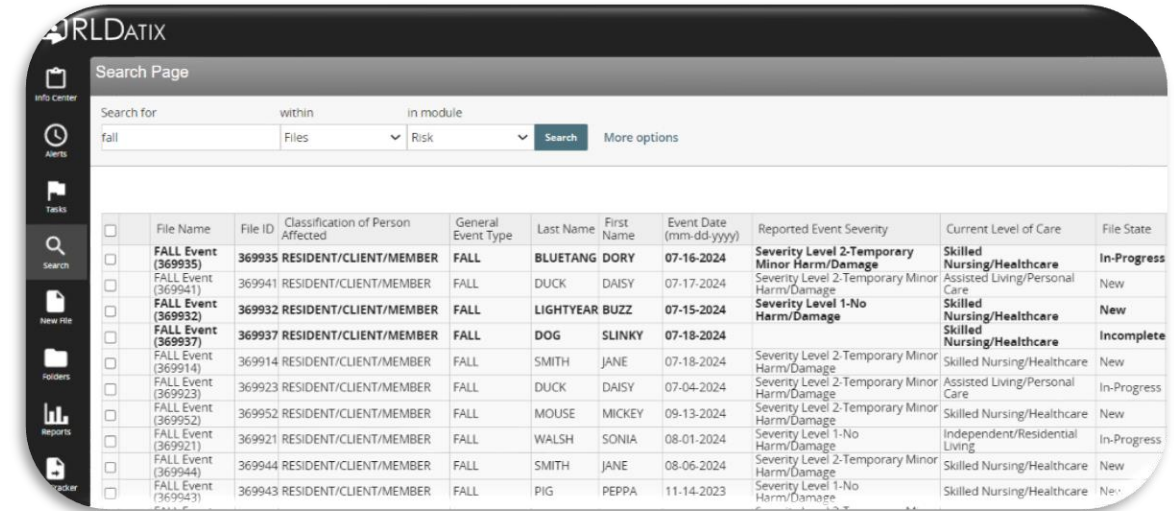
Your alerts will also show within the Alerts tab in PEER

If you opt to manage your alerts from here, you can "acknowledge" your alerts to remove them from the "New Alerts" view and add them to "Acknowledged Alerts" view.

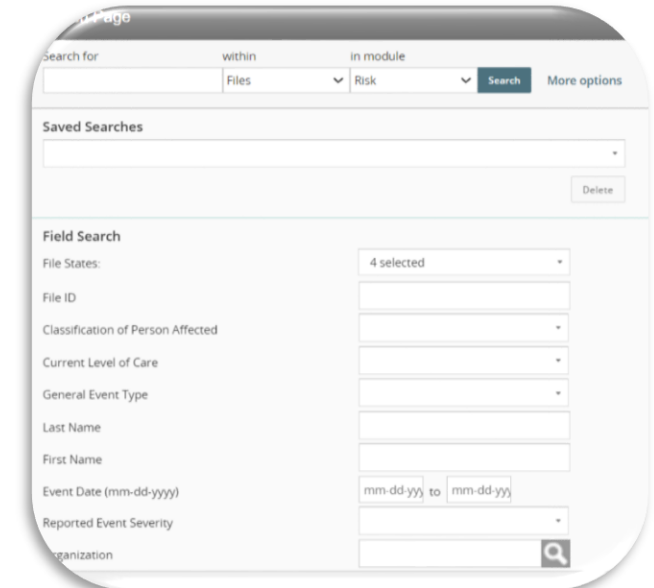
In-system alerts can also be used as a back-up to ensure that nothing is missed through email.

Search

You can also search for events by typing a search term into search bar



Or you can expand your search by clicking the blue "more options" link next to the search button for even more criteria!



Adding Follow-up

Follow-up can be added by clicking the blue "Add Follow-up" button in the upper left when you are in an event.

RLDATIX

Info Center

Alerts

Tasks

Search

New File

Folders

Reports

FALL Event Management Form - 369955

Add Follow-up

Work done on file

Review

Sign-Off

Person Information

Event Details

Fall Specific Event Details

Attachments

File Notifications

Linked Files (0)

Duplicate Files (0)

Related Files

Alerts (0)

FSA

FRIENDS SERVICES ALLIANCE

Event Date: 09-17-2024

Entered Date: 09-17-2024

Rep Severity: Severity Level 1-No Harm/Da

Fields labeled with an asterisk(*) are required.

General Event Type

Classification of Person Affected

* RESIDENT/CLIENT/MEMBER

Current Level of Care

* Independent/Residential Living

Was There An Injury?

* no

Follow-up: Work done on file

Enter the sub-type to explain what type of work you have done, the date, your name, etc.

Click "Add"

The new follow-up will now appear in the Follow-up List section on the event form.

New Work done on file Follow-up?

Fields labeled with an asterisk(*) are required.

General

TypeWork done on file

Sub-Type*

Date*09-23-2024

Followup By*Linda Durbin

Followup To/With

Item Purchased

Detail

Form Letters: Please Select

PopulateEmailPrintDownload

CancelAdd

ED A TASK, A FOLLOW-UP MUST BE DOCUMENTED DESCRIE
TASK.

Sub-Type	Followup By	Followup To/With	Date
Investigation	Linda Durbin		09-23

Follow-up: Review

Enter the sub-type to explain what type of review you have done, the date, your name, etc.

Click "Add"

The new review follow-up will now appear in the Follow-up List section on the event form.

New Review Follow-up?

Fields labeled with an asterisk(*) are required.

General

TypeReview

Sub-Type*Reviewed

Date*09-23-2024

Followup By*Linda Durbin

Followup To/With

Item Purchased

Detail

Form Letters: Please SelectPopulateEmailPrintDownload

CancelAdd

Followup List

IF YOU WERE ASSIGNED A TASK, A FOLLOW-UP MUST BE DOCUMENTED DESCRIBING COMPLETION OF THE TASK.

Follow-ups

EditDelete

<input type="checkbox"/>	Type	Sub-Type	Followup By	Followup To/With	Date	Description
<input type="checkbox"/>	Work done on file	Investigation	Linda Durbin		09-23-2024	
<input type="checkbox"/>	Review	Reviewed	Linda Durbin		09-23-2024	

Signing off on a file

Select your sign-off, add the date, your name, etc.

Click "Add"

The "sign-off" will now appear in the Follow-up List section on the event form.

Sign-offs can be used to signal from one file manager to the next that their piece of the investigation is completed.

The screenshot shows a web form titled "Sign-Off Follow-up" with a subtitle "Fields with an asterisk(*) are required." The form includes a "Sign-Off" dropdown menu, a list of sign-off roles with asterisks indicating required fields, and a "Please Select" dropdown menu. At the bottom, there are buttons for "Populate", "Email", "Print", and "Download", and a "Cancel" button.

Sign-Off Follow-up
Fields with an asterisk(*) are required.

Sign-Off

* [Blue bar]

* Sign off by ADON

Sign off by Care Coordinator

Sign off by C Suite (CEO/COO/CFO)

* Sign off by Director of Nursing

Sign off by HR

Sign off by Licensed Nurse

Sign off by Manager/Administrator/Director

Sign off by Medical Director

Sign off by NH Administrator

Sign off by on site Risk Manager

By: [Please Select]

To/With: [Please Select]

Based on: [Please Select]

Populate | Email | Print | Download

Cancel

Organization Outcome

Closing a File

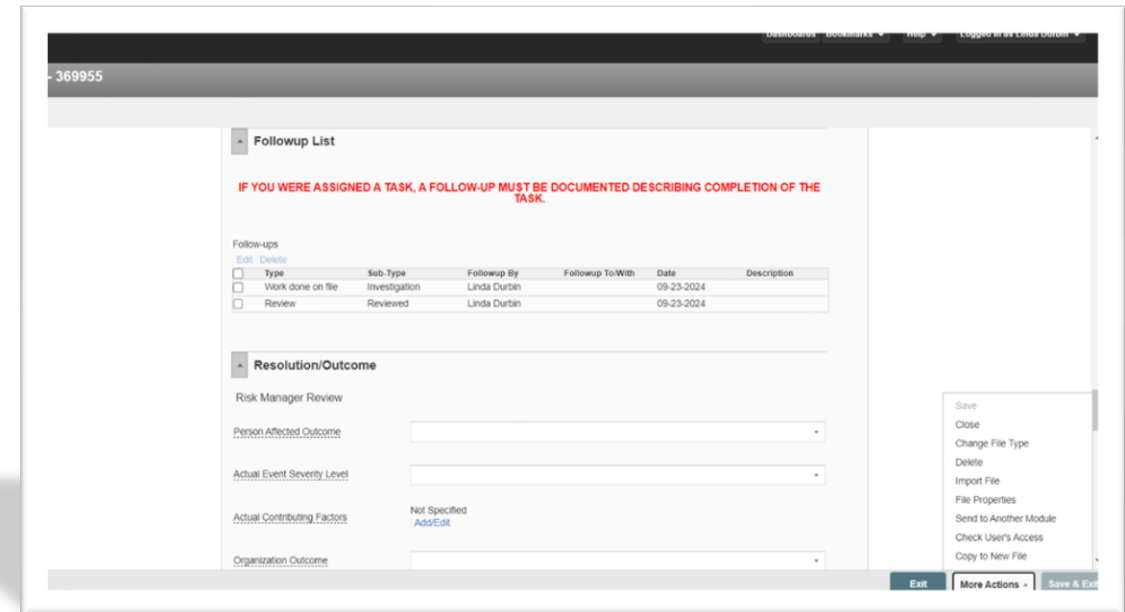
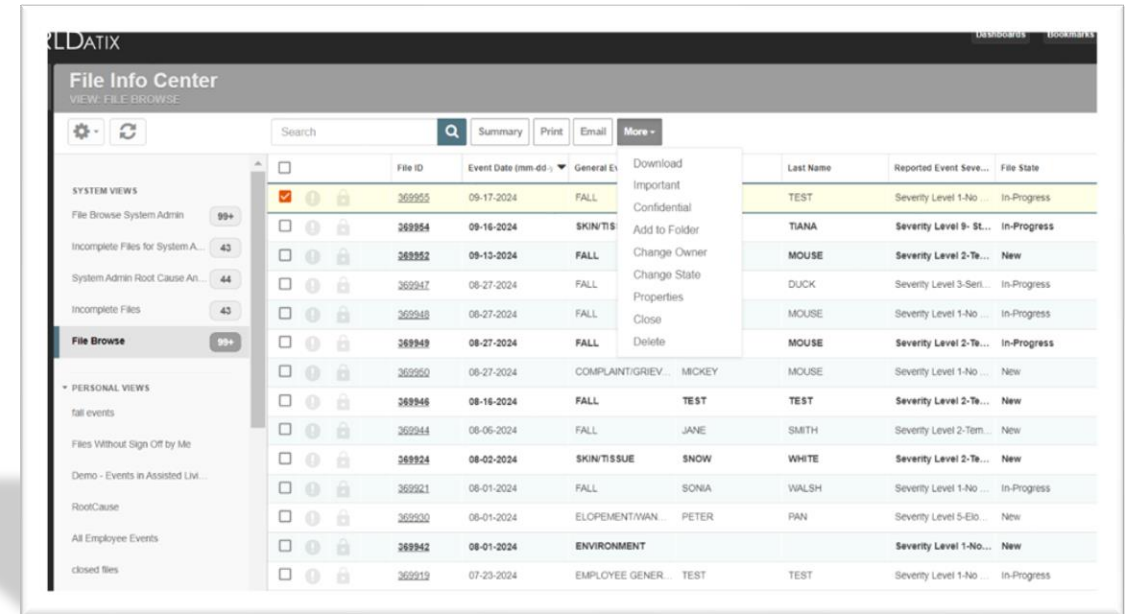
After the Investigation is complete, the file can be closed in one of 2 ways

1. From the Info Center

- Check off the file(s) that you would like to close
- Click the "More" tab
- Select "Close" from available options

2. From the Event file

- Open the file
- Click "More options"
- Select "Close"

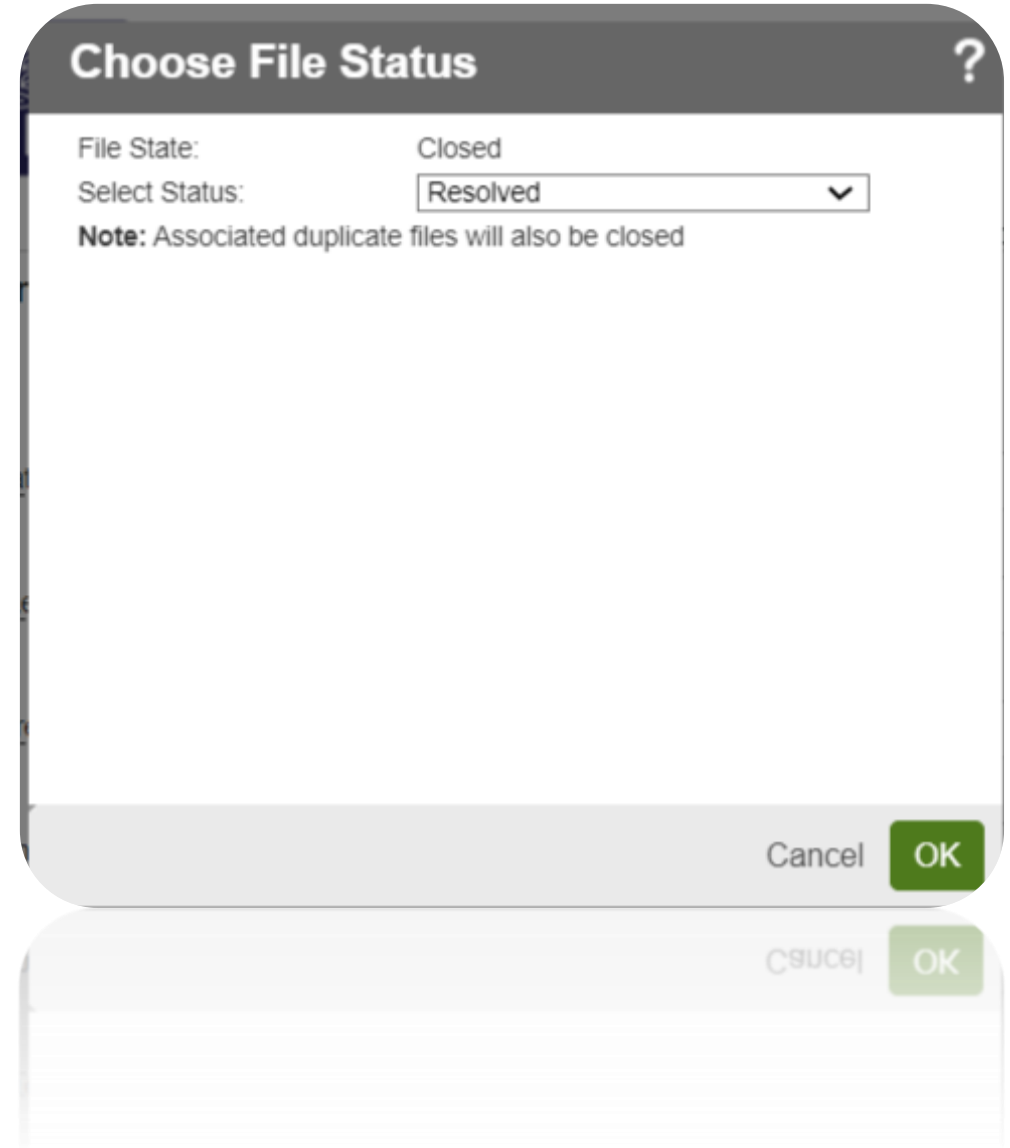


Closing a File – 2

After you select close, the dialog box to the right will appear.

Most files will be closed with a "Resolved" status.

Once a file is closed, it will no longer show in the views in the Info Center but can still be found in "Search" and will still be reflected in reports.



Choose File Status ?

File State: Closed

Select Status: Resolved ▼

Note: Associated duplicate files will also be closed

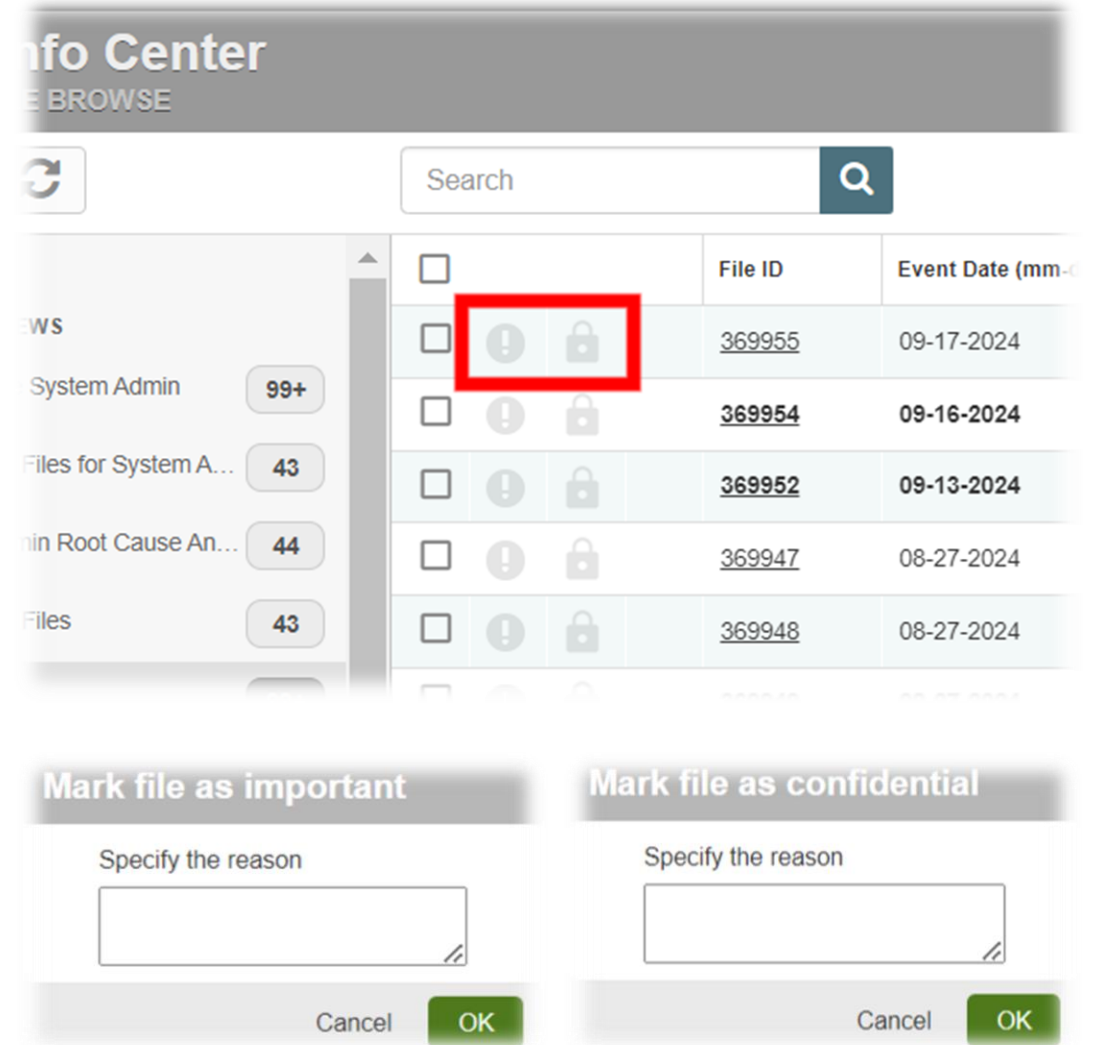
Cancel OK

Marking a File as Important or Confidential *from the Info Center*

Click the exclamation point to mark a file as Important
Click the lock to mark a file as confidential
Specify the reason in the pop-up dialog box

Important:

- *The reason you specify will only be available to you.*
- *Only High Level file managers and Risk Managers can mark a file as confidential – this will remove it from other user's views*



Marking a File as Important or Confidential *from within the file*

Step 1: Click on the "More Actions" tab

Step 2: Click to select "File Properties"

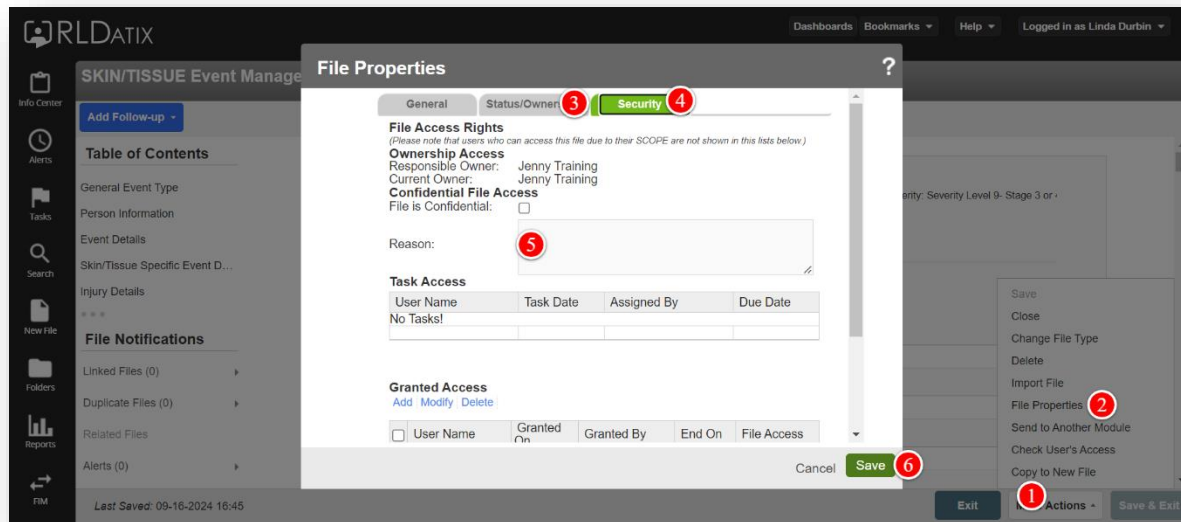
Step 3: Click to open the "Status/Ownership" tab – check the box to "Mark as Important"

Or

Step 4: Click to Open the "Security" tab – check the box for "File is Confidential"

Step 5: Specify Reason

Step 6: Click "Save"





The End

Thank you!

**If you have any
questions,
please feel free
to contact FSA
PEER Support**