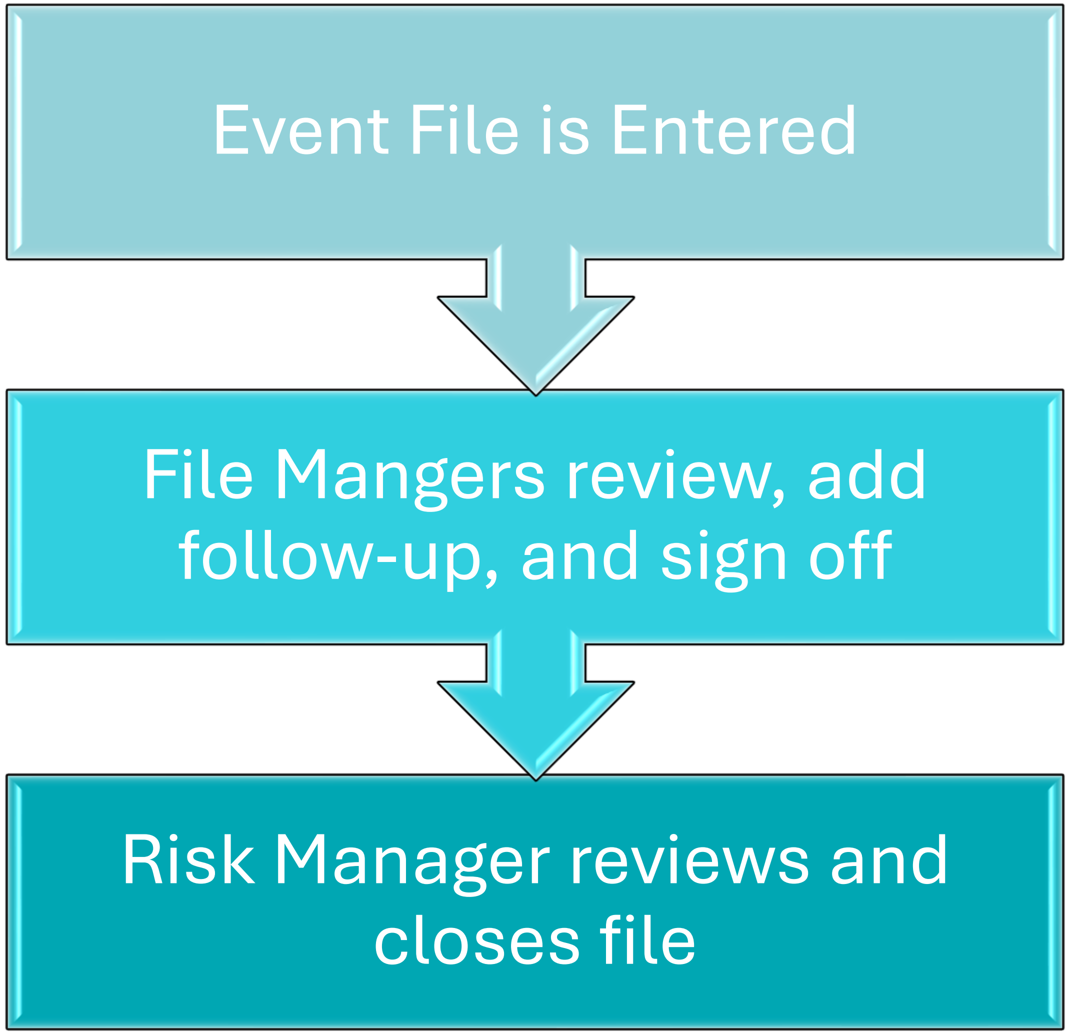
PEER
Incident File Management

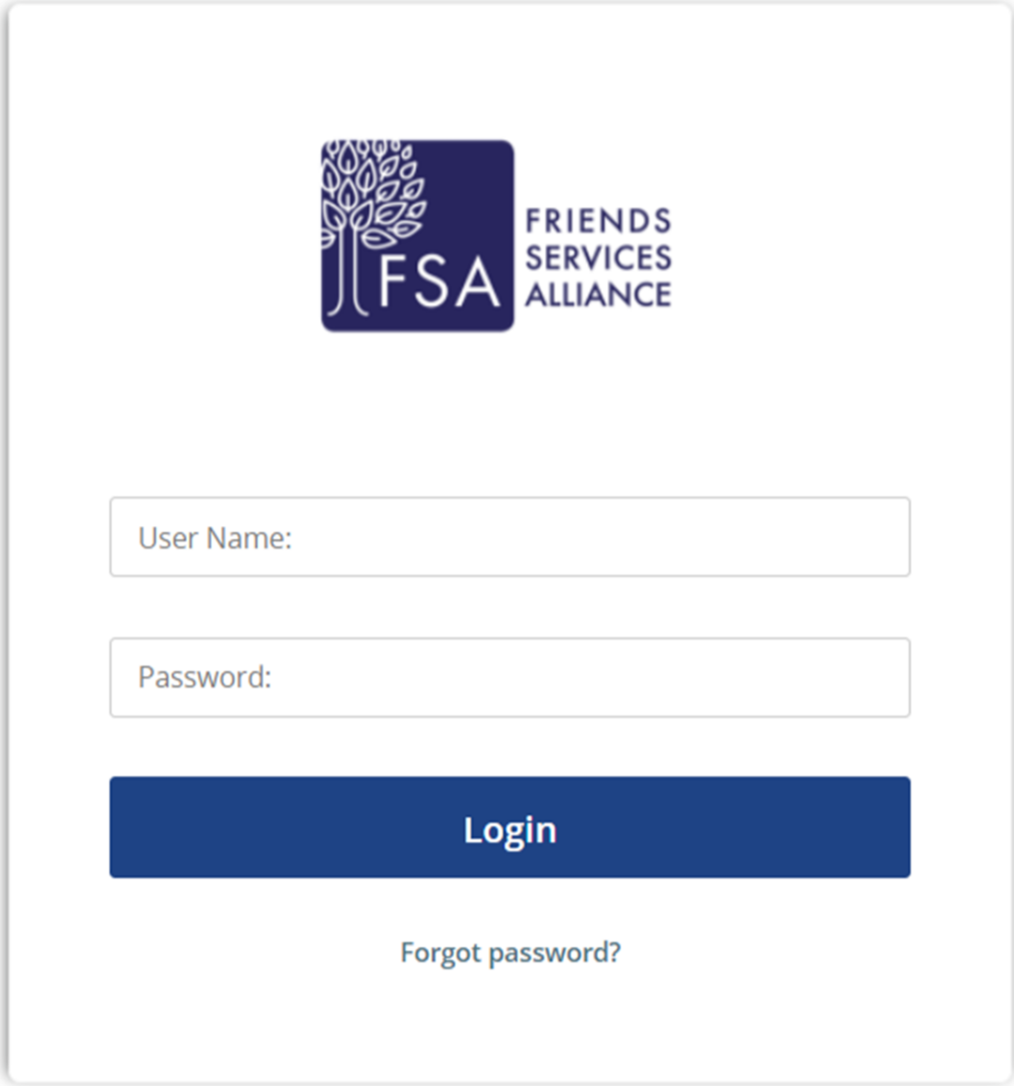
Workflow and Follow-up

FSA

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





Logging to PEER

Step 1:

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

Step 2:

Enter your Username and Password

Step 3:

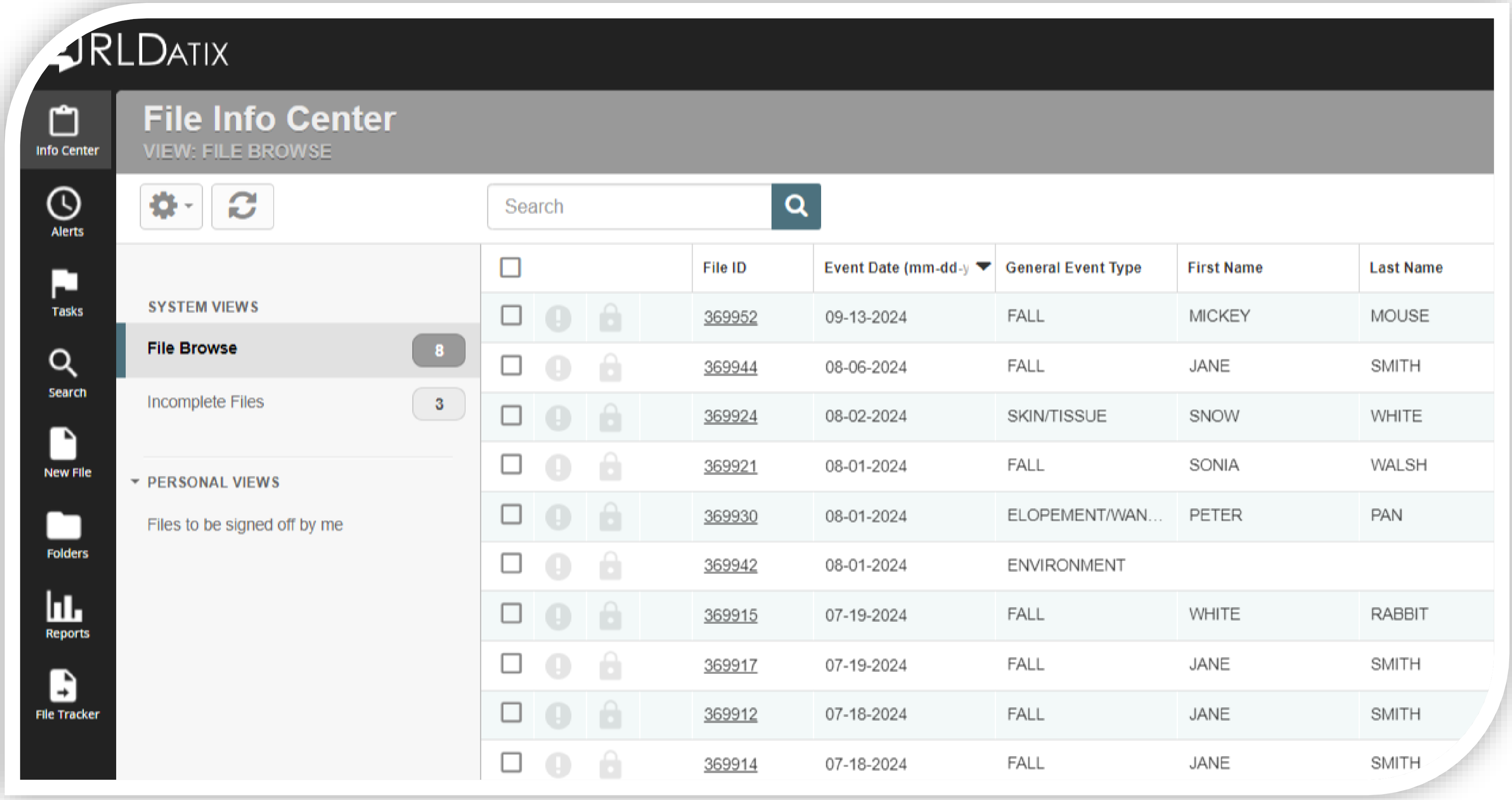
Click the blue "Login" button

4 Ways to Locate Events

- Info Center
- Email Alert
- Alert View
- Search

Info Center

Click on the Info Center Icon in the top left



System Views

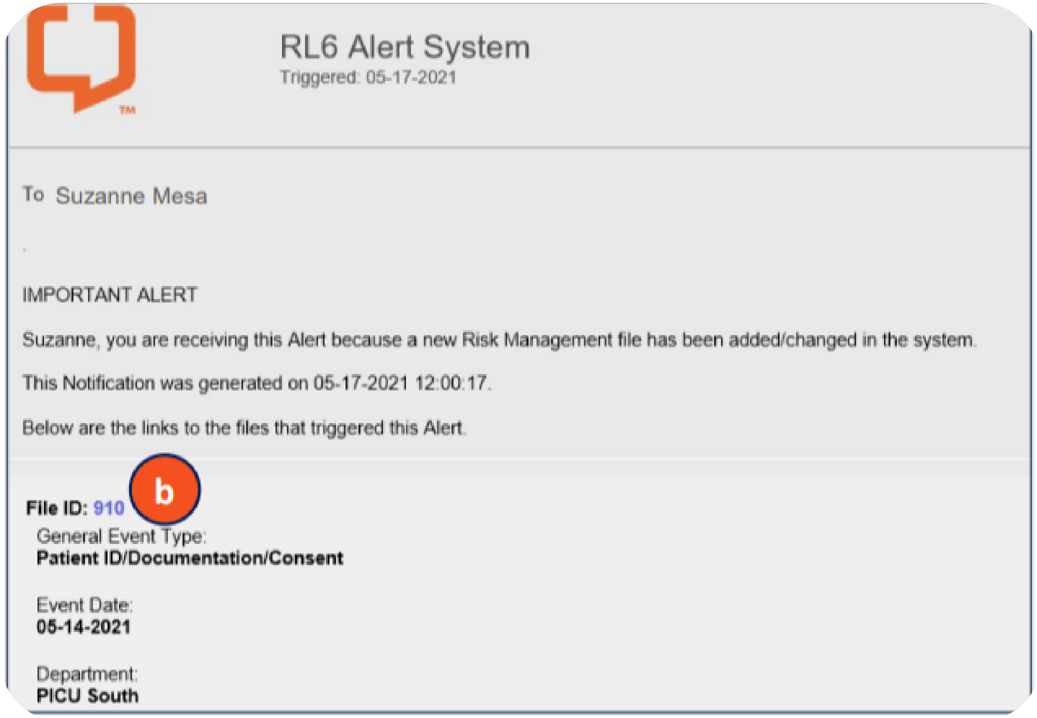
These are preset views that PEER provides. Within File Browse you will see all the files you have scope to see

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

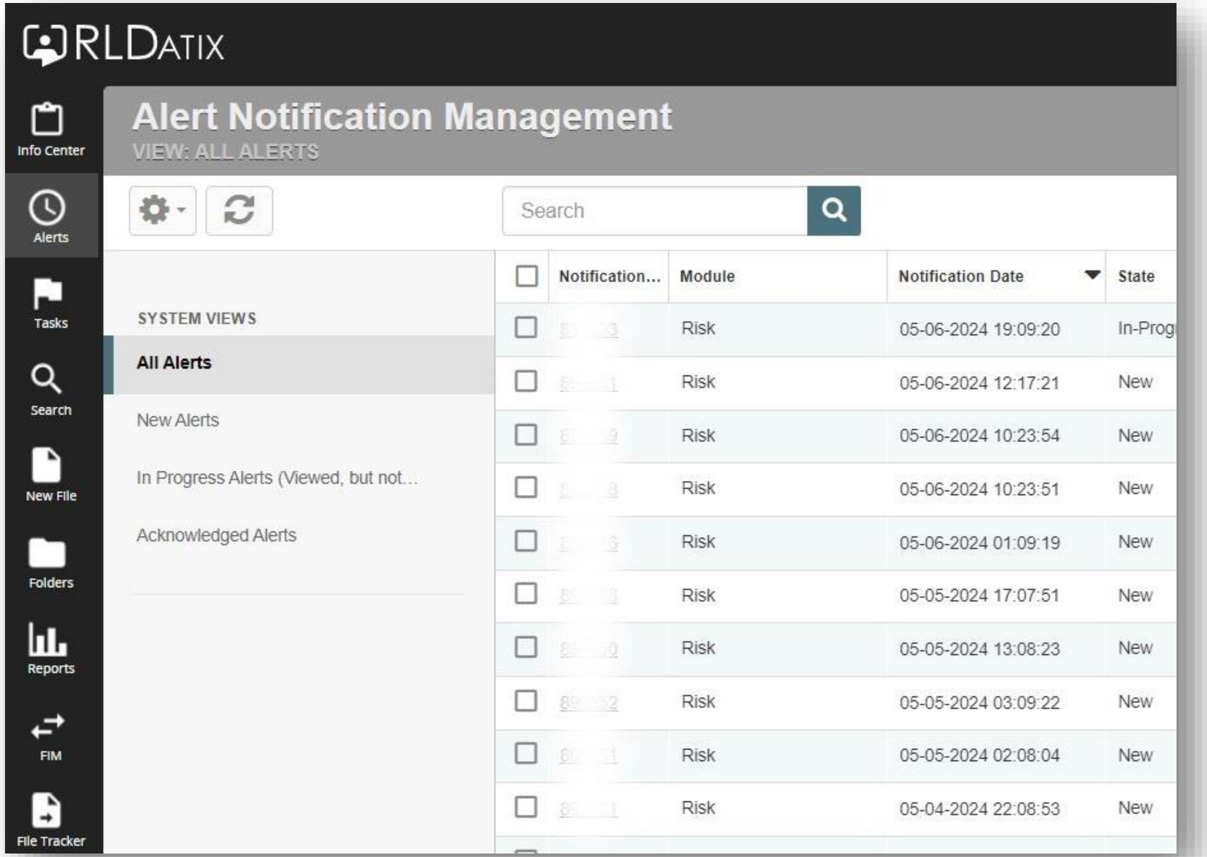


If alerts have been set up, you will receive an email when an event occurs that you need to manage

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



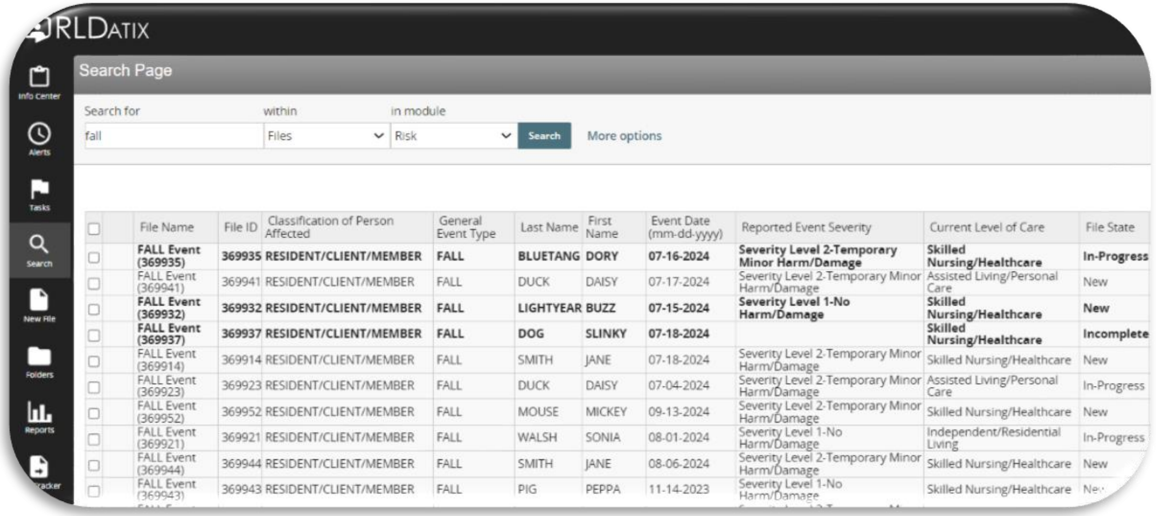
Your alerts will also show within the Alerts tab in PEER

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

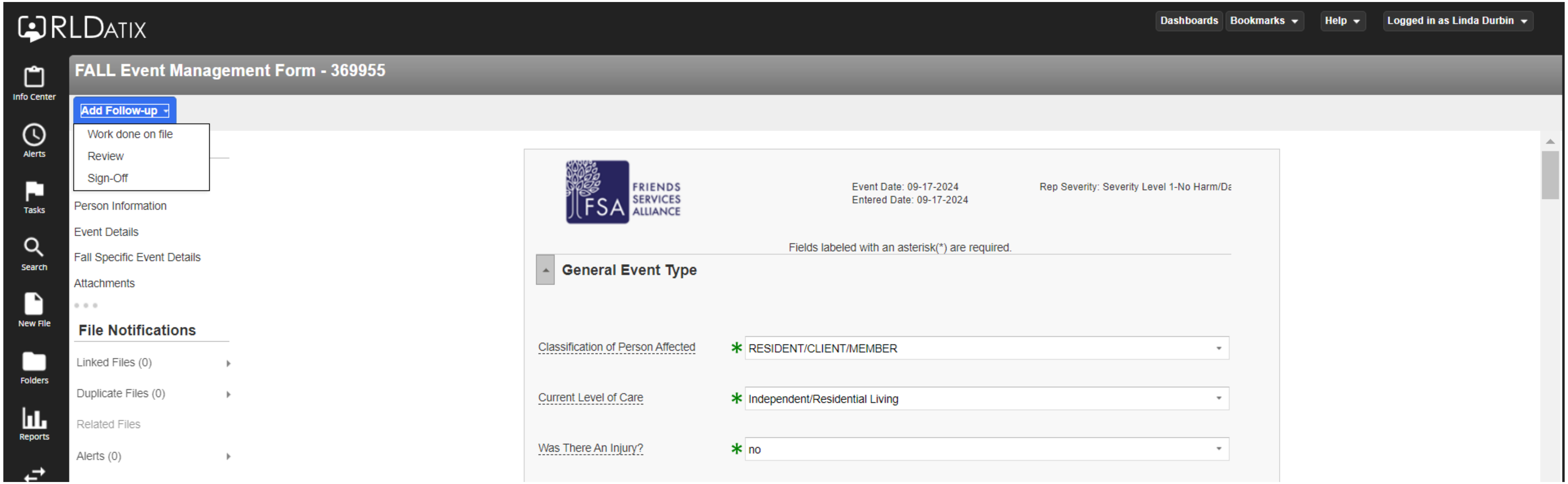
You can also search for events by typing a search term into search bar



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.

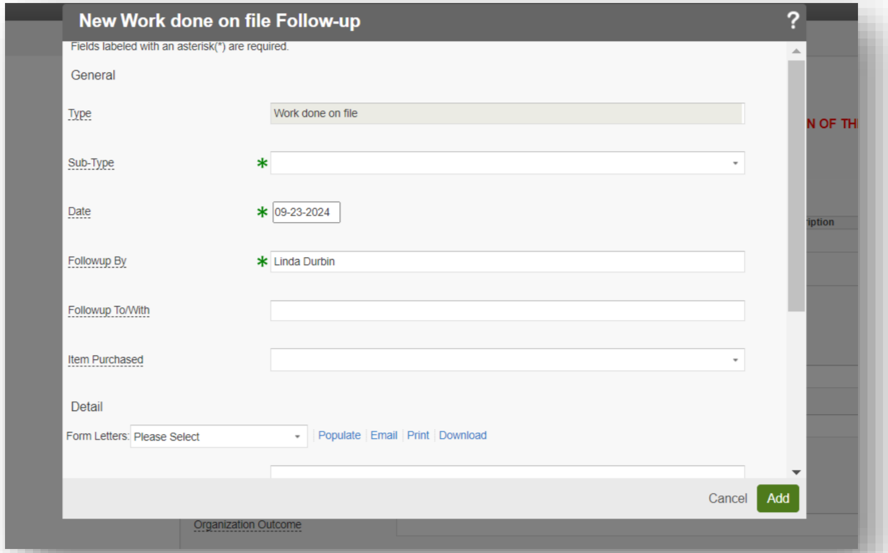


Follow-up: Work done on file

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

Click "Add"

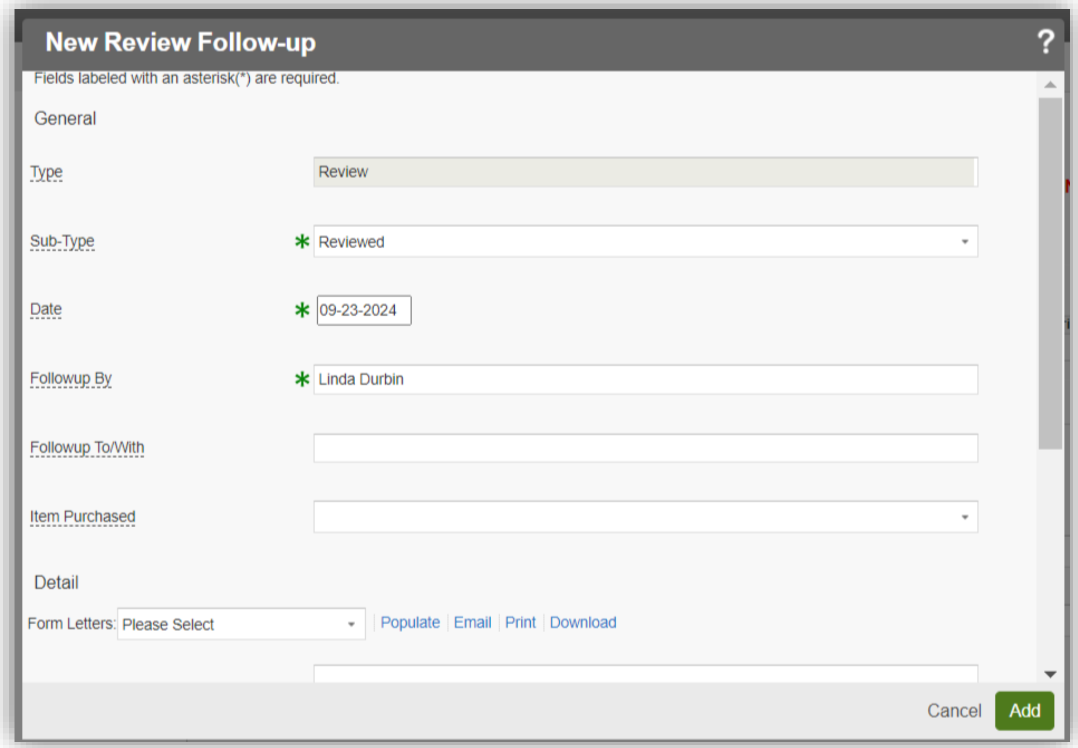
The new follow-up will now appear in the Follow-up List section on the event form.



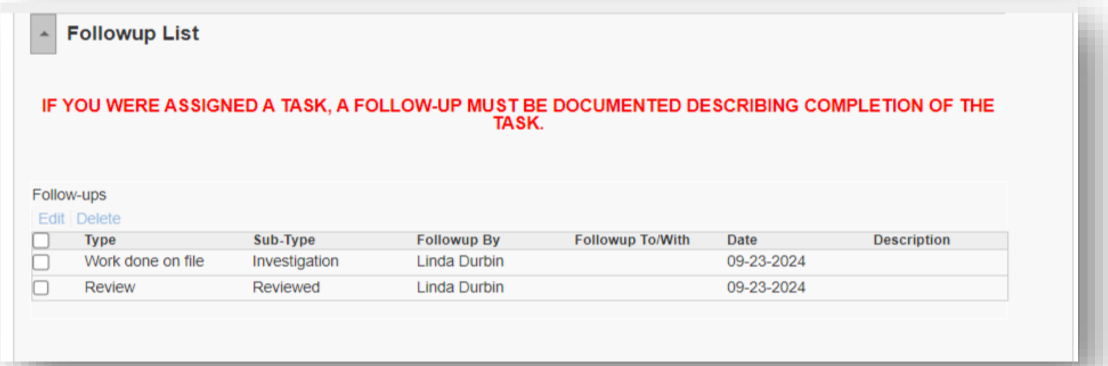
Follow-up: Review

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.



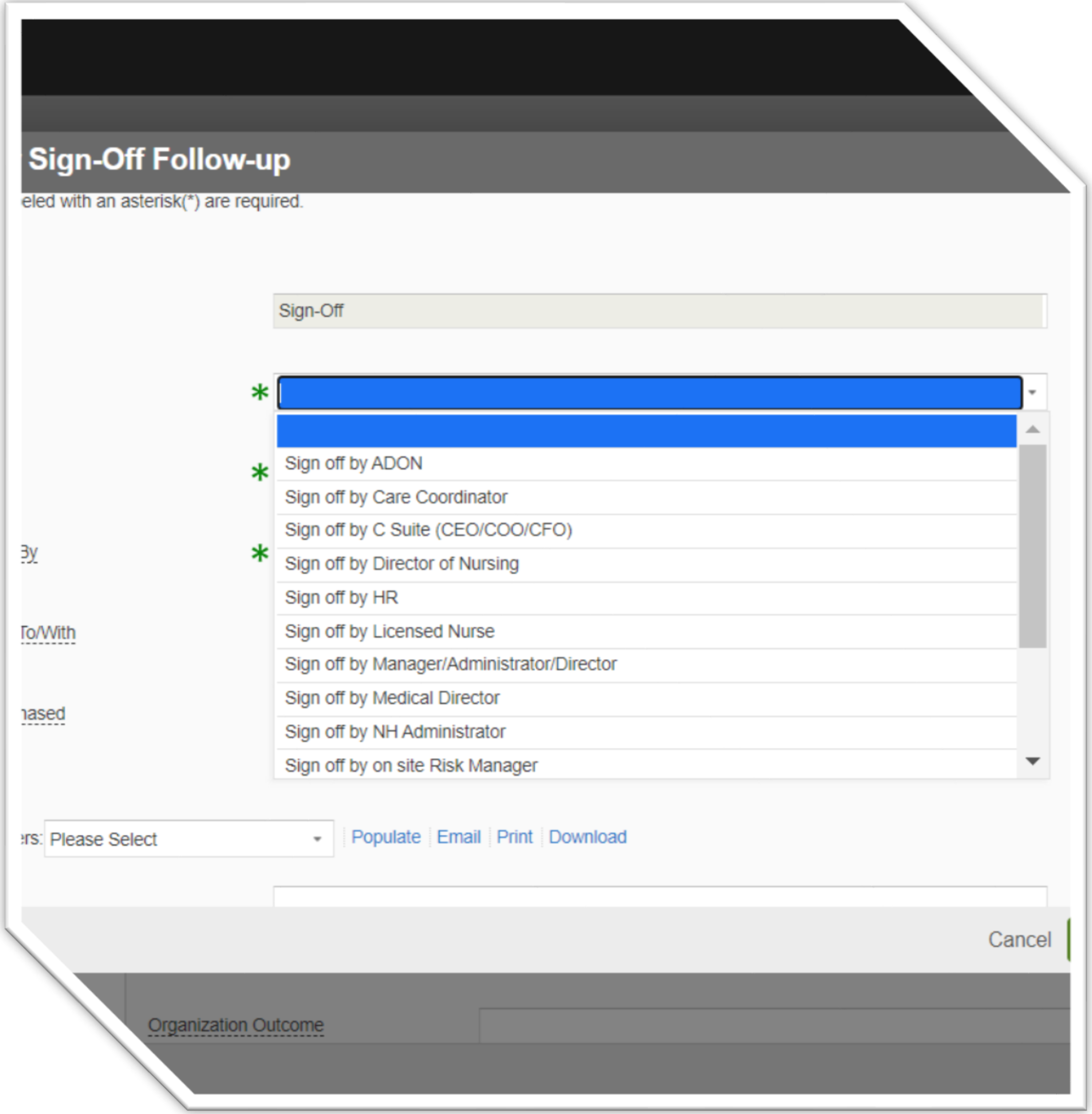
Signing off on a file

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.

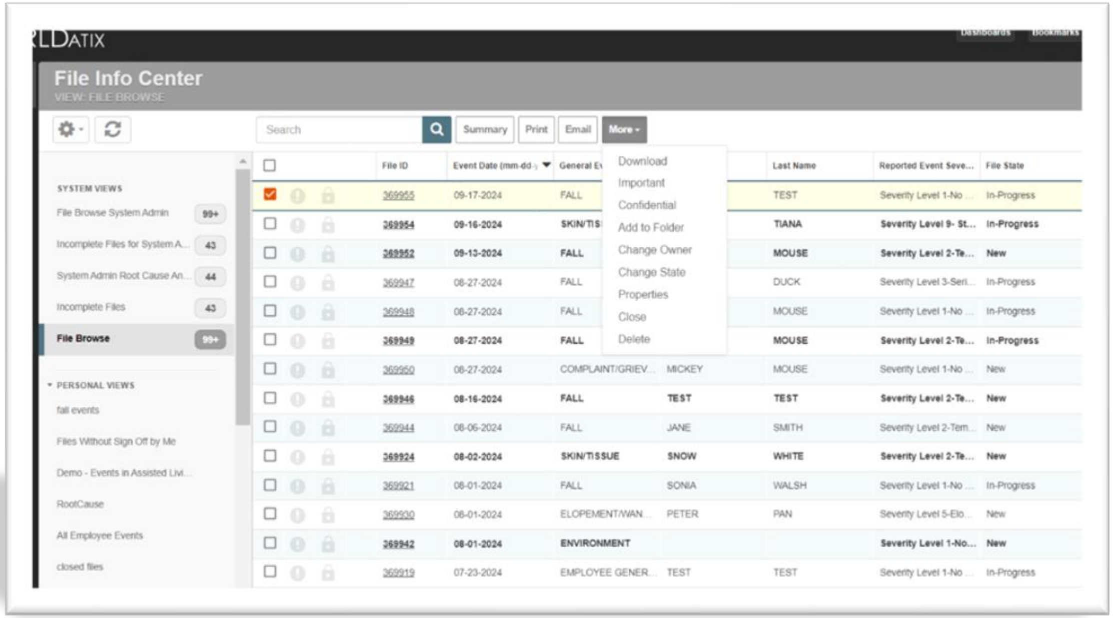
Sign-offs can be used to signal from one file manager to the next that their piece of the investigation is completed.

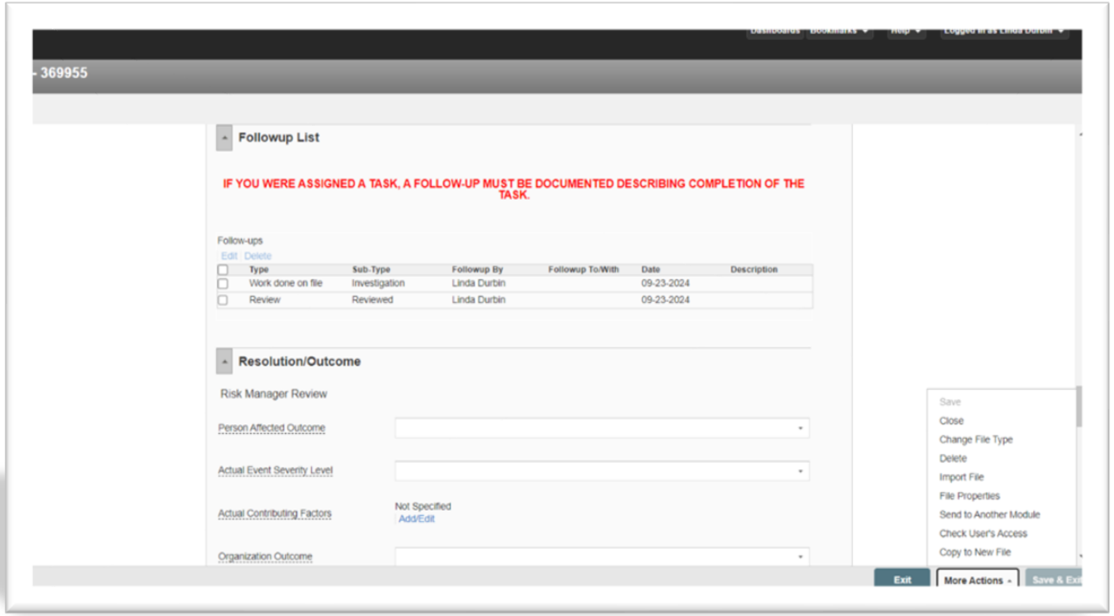


Closing a File

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"



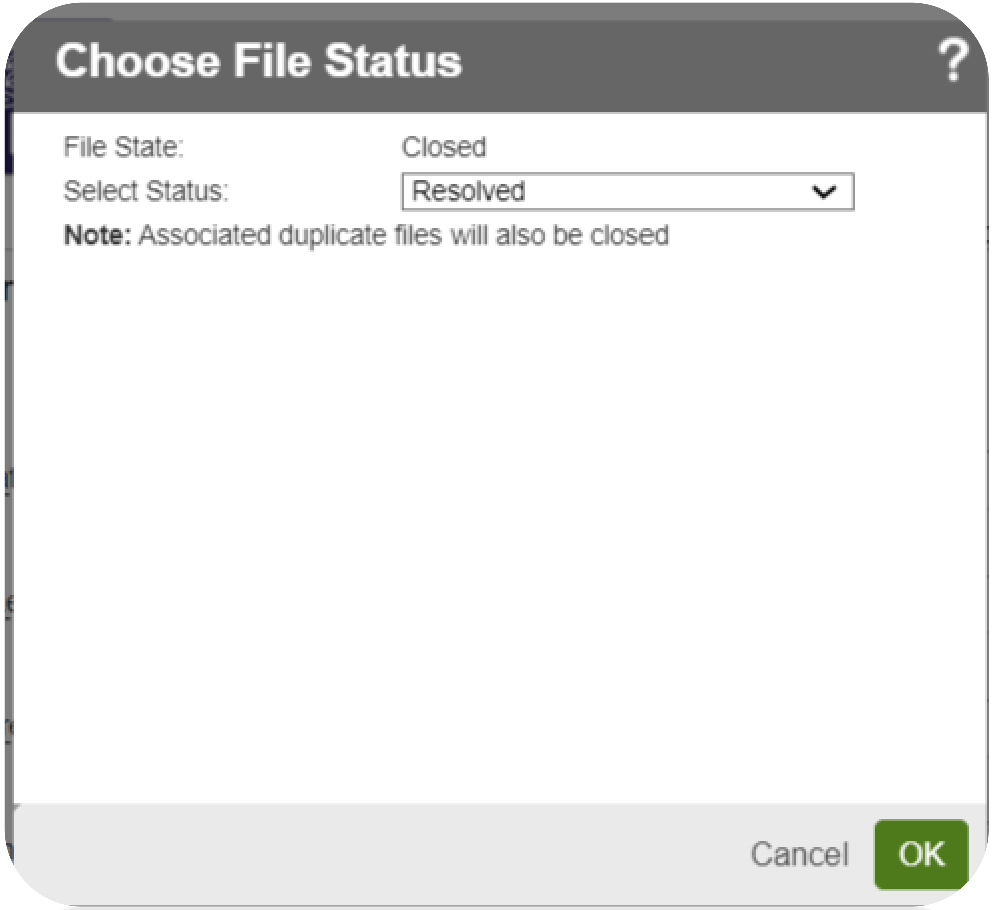


Closing a File – 2

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.

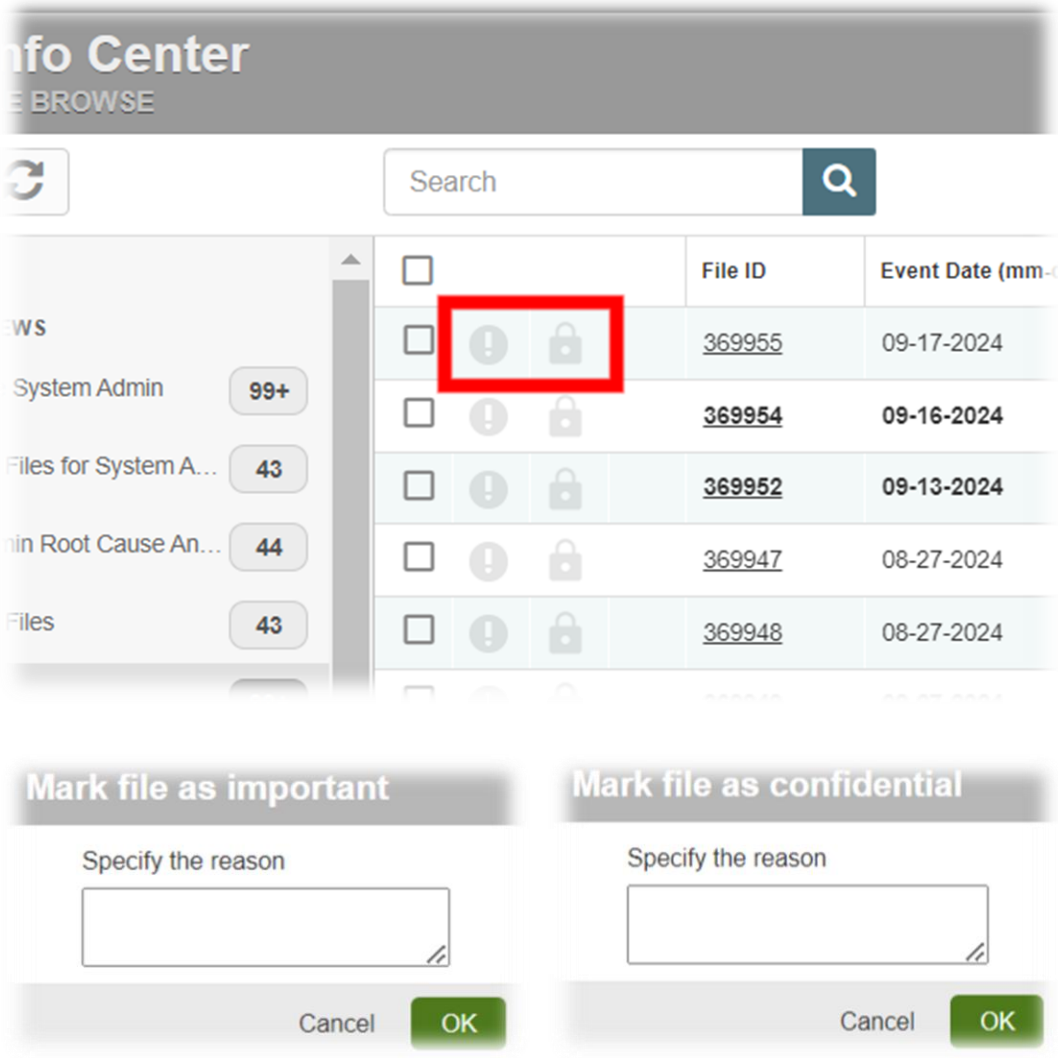


Marking a File as Important or Confidential *from the Info Center*

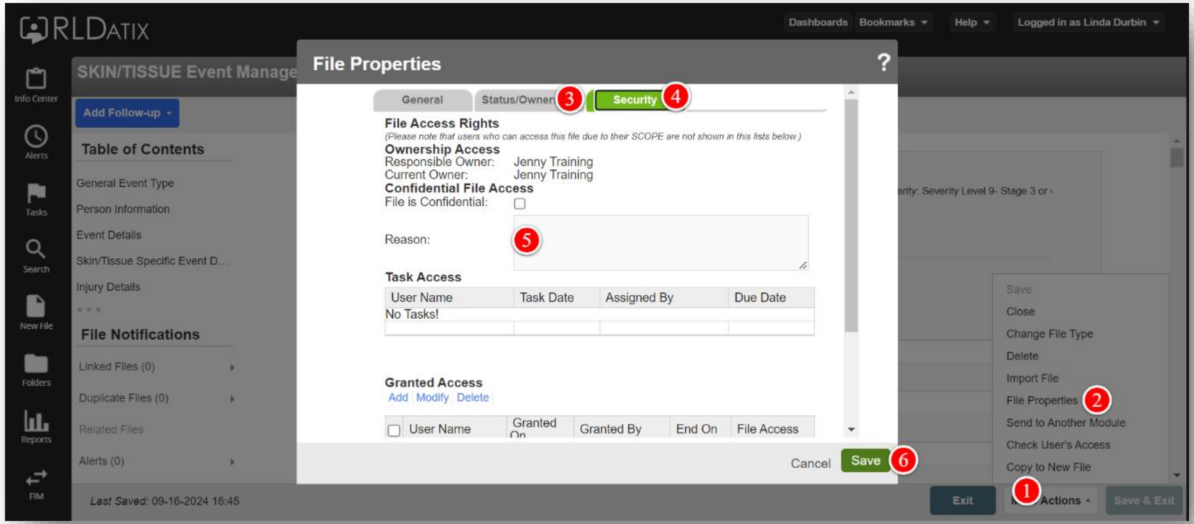
Click the exclamation point to mark a file as Important
Click the lock to mark a file as confidential
Specify the reason in the pop-up dialog box

<u>Important:</u>

- *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"

Thank you!

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