

FSA PEER Support Services Guidelines for Creating and Saving Reports in RL6/PEER

The following document takes you through the creation of two different types of reports that are available in PEER/RL6, a bar graph report and a simple list report. You will also be guided through running an existing report and making changes/adjustments, saving a report, and finding a saved report. For additional assistance or training on creation of reports, please contact Linda to schedule training in person or via webinar.

Understanding the Report Center



The Report Center in PEER is accessed by clicking the Report icon on the left side of the screen.

Only File Managers with Reports, Risk Managers and System Administrators are able to access this center. If you are unable to access the Report Center and you believe you should have access, contact the Risk Manager at your organization for assistance.

RL	software for safer healthcare						۰	Dashboards	Bookmarks 🔻	Logged	in as RL Solut		
ھ	Report Center Report Manager Admin Picks												
	Report Manager Denomin	nators											
	Quick Links	e	Creat	reate More -								Q	
7	Favorites Recently run reports	(Module	Report Name	Report ID	Descripti	on				
4	Report Manager Admin Picks			☆	Risk	Entrapment Risk Report	<u>1001244</u>						
•	All snapshots			☆	Risk	Medication Errors - for Risk Mgt.	<u>1000919</u>						
	Search all reports	C		☆	Risk	Risk Complaints and Grievances Campus Wide	<u>1001811</u>						
		0		☆	Risk	Risk Severity 3+ to CCSS Last Quarter	<u>1001929</u>						
ln-1	Folders Options	•											
	My Reports (Private)												
R	🕨 🖿 Other Users' Reports												
) »»	🕨 Þ 🖿 Public												

The above picture is the Report Center. The displayed Quick Link is your **Report Manager Admin Picks** – these are reports created by FSA Risk Management and accessible by all who have access to the Report Center. Click





any of the Quick Links to see more reports available for use. When run, these reports will populate for you depending on your scope so you will not see information from other organizations in the program.

The Report Center contains two tabs at the top: Report Manager and Denominators. You can navigate between both tabs, but will predominantly work within the Report Manager tab.



In addition to the **Report Manager Admin Picks**, there are three other **Quick Links** within the Report Manager.

	4 1154a	The first Quick Link is Favorites and it contains all of the reports that you					
Quick Links	♥ Hide	frequently access. To identify any report as a Favorite, click the star					
Favorites		□ ☆ icon to the left of ★ the report. Once selected, the					
Recently run report	s	star will become dark blue.					
Report Manager Ad	lmin Picks	Recently run reports is the next Quick Link – this list of reports contains					
All snapshots		your session history. Access this Quick Link to retrieve previous versions of					
Search all reports		reports that you have run. Your session history is now saved even after you log out.					
Folders	Options 🗸	You can also access the last few versions of a report from the Report Editor.					
My Reports (Private)		All snapshots Quick Link contains a list of all report snapshots, which are					
🕨 🖿 Other Users' R	eports	pdf images of the report.					
🕨 🖿 Public		Search all reports is the advanced search feature for searching reports.					

Folders can be found at the bottom left corner of the Report Center. Each organization has a folder with their name on it, followed by ONLY. Please do not access reports from an organization other than your own. Although you can run the reports from another organization, it will only populate with data from your scope and you will be unable to view the data from others.

You can navigate through different folders to find reports that you have access to. Depending on your role, you may be able to create new folders and save reports to those folders.

The **Report Editor** is now accessible in each area of the Report Center via the **Create** and **More** buttons.



Quick Links	🗲 Hide	Create		More 🗸
Favorites				Module
Recently run reports Report Manager Admin	Picks		*	Risk

When creating a report, think clearly about what data you are looking to show and how you want to display it.

In our next example, we want to create a report that will show all of the falls that happened in Skilled Nursing based on what kind of fall they are for a certain period of time (a week, a month, a quarter, a year, for example). This would best be displayed in a bar chart where each bar will show the number of falls for that specific type of fall. Note that when creating a report in PEER, you will need to know field names so that the correct information will populate the report.

Hint: If possible, print a copy of an event report for a fall so that you will be able to see the names of the various fields (the field is the question on the left side of the page, some of which have green asterisks next to them if they are mandatory).

Once you are familiar with the names of the various fields, creating reports is easier. Common fields used in reports are General Event Type (i.e., falls, skin/tissue, med errors), Specific Event Types (i.e., fall from wheelchair, omitted medication, unknown skin tear/bruise), Current Level of Care (Skilled Nursing, Assisted Living, Independent Living), General Location (depends on how your organization's location list is set up, but might be the name of the unit, the floor of the building, the type of residents cared for), or the Event Location (again, look at your organization's location list in PEER).

Creating a Bar Chart Report

To create a report, click on the **Create** button from any area of the Report Center. This will open the Report Editor and allow you to create a report from the very beginning.



When you open Report Editor, you will see the following screen:

Report Editor		
- Report Type		
Style Pie Chart Bar Chart Stacked Bar Chart Line Chart Bubble Chart Simple List Report Crosstab Report	Module Risk Feedback Claims Infection RootCause PeerReview Risk Register Orientation Portrait Portrait Landscape 	Size • Letter Legal A4
 Titles Details Date Range Conditions 		
Report Editor		
- Report Type		
Style Module Pie Chart Stacked Bar Chart Chart Stacked Bar Chart Stacked Bar Chart Stacked Bar Chart Stacked Bar Chart Chart Stacked Bar Chart Chart Stacked Bar Chart Chart Stacked Bar Chart Chart Stacked Bar Chart Chart Stacked Bar Chart Stacked Bar Chart Chart Stacked Bar Chart Stacked Bar Chart Stacked Bar Chart Crosstab Report Crosstab Report Crosstab Report Stacked Bar Chart Corientation Stacked Bar Chart Stacked Bar Chart Crosstab Report Stacked Bar Chart Stacked Bar Chart Crosstab Report Crosstab Report Stacked Bar Chart Stacked Bar C	Size © Letter Legal	
→ Titles → Chart Details	<u> </u>	
Chart Fields Aggregate function to be used in the graph. None Data value field to be used in the graph. Grouping	▼ Vone	Y
Group by:	▼ None▼ None	 None
Display		

The five (5) different sections will need to be completed in order to run your report. The first report example in this document is a Bar Chart report titled *Falls by Specific Event Type in SNF*.

Remember – in order to open or collapse a section, click on the triangle next to the title. Some sections in the Report Editor will not open up until the preceding sections are completed.

Select your Style (Bar Chart will be selected for the first example), select the Module (Risk), and select the Orientation (for Bar Chart, we recommend Landscape).

As you select the Style, you will see the Chart Details section automatically open with the different data fields that are available for that Style of report.

Next you will need to open the **Titles** section by clicking on the arrow next to the heading. Once open, you can type in the name of the report in the text boxes.



- Titles	
Titles	
Report Title:	
Falls by Specific Event Type in SNF	Click to add variables
Sub Title 1:	
	Click to add variables
Sub Title 2:	
{Filter}	Click to add variables
Footer:	
	Click to add variables

This title can be adjusted at any time by going to the Titles section and changing the information in the text box.

The Sub Titles are available for additional text such as date ranges, level of care, etc. You can also add variables (self-populating choices that are updated every time you run the report). We recommend adding the Date variable in the Footer text box so that the run date is shown each time you run the report.



Next is the **Chart Report Details** section. Note that the heading changes depending on the Style of report you select. For this report example, *Falls by Specific Event Type in SNF*, we want the report to count the number of resident falls for each specific event type in the Skilled Nursing level of care.



Chart Fields		
Aggregate function to be used in the graph:	Count 🔻	
Data value field to be used in the graph:	None T	
Grouping Group by:	Calc Last Follow-up - Work Done on file (Event) Calc Last Follow-up - Work Done on file(Submitted)	•
Sub group by: Display	Submit File to CCSS? Incident File File ID File Name	
●All Top 20 Valu Show the remainder Format:	File Owner File Responsible Owner File State FileNr	l
Data Show data grid Show regression line Axis	Incident UDFS Created by File Owner	•
Label angle: 30 🔹 📄 Stagger lat	file Cancel	

A Bar Chart report can count the number of files in certain categories. In the first field function, select Count. The data field that you want to count in PEER is FileNr (these numbers are all different, so it allows the software to count the number of individual files in the groups you select).

Select FileNr by clicking the triangle/arrow in the Data value field (see above) and typing the name of the field that you want in the text field at the bottom of the drop down. Highlight and click the field and it will populate the field. Once you start typing a word, the selections narrow until you get to the choice you want. If you are unsure of the terminology or exact field name, try typing a word that is in the name and see if your choice is there. If you are not sure at all of the term you need, you may need to reference an event form to find the term you wish to use. In some cases, you also need to pay attention to the section titles in green with a bar next to them. That references the section where the term exists in the forms themselves. Sometimes multiple sections have the same term but this does not happen very often.

Chart Fields				
Aggregate function to be used in the graph:	Count •			
Data value field to be used in the graph:	FileNr	•	Ascending •	B
Grouping			None Ascending	
Group by:		-	Descending None	٣
Sub group by:		~	None •	



You can choose to make your bar chart show the numbers in ascending order by selecting this term in the box next to the Data value field – this will show the smallest number to the highest number. If not, it will sort by the terms in the group that you select.

Now you select the Grouping. For this report example, *Falls by Specific Event Type in SNF*, we want the report to group the files by Specific Event Type.

Chart Fields				
Aggregate function to be used in the graph:	Count 🔻			
Data value field to be used in the graph:	FileNr	•	Ascending	•
Grouping				
Group by:		-	None	None
Sub group by:	In the second second			_
Display	Specific Event Type			
●All Top 20 Val	ı			
Show the remainder Format	t			
Data				
Show data grid Show regression line	•			
Show data grid Show regression line	2			
Axis Label angle: 30 • Stagger la	r t			
Axis Label angle: 30 Horizontal Axis Text:	* t			

In the Group by: field, click the arrow and in the drop down box text field, start typing the grouping term you want to use, click the term and it will populate the field. In this report, we are grouping by Specific Event Type. Other ideas for grouping include by general location, event location, or location; by level of care; or by shift.

Note: if you choose to sort the data by ascending FileNr count, you should not also try to sort the group by ascending. Only apply ascending to either choice, not both.

Now that you have the report counting the number of files (FileNr) for each Specific Event Type, you can select the Axis titles if you wish by typing them into the text boxes.

Chart Fields				
Aggregate function to be used in the graph:	Count •			
Data value field to be used in the graph:	FileNr -	Ascending •		
Grouping				
Group by:	Specific Event Type -	None None	•	Show All Values 📃
Sub group by:		None •		
Display				
		Point Labels		
●All Top 20 Va	lues Grand Total	Show point labels		
Show the remainder Forma	at: General 🔹 📄 Show the grand total	Position	Тор	v
		Overlapping Mode	None	•
Data ☐ Show data grid ☐ Show regression lin	e			
Axis				
Label angle: 30 V Stagger la	abels			
Horizontal Axis Text: Specific Event Type Vertical Axis Text: Number of Falls				



The Display and Values data are usually not adjusted for this type of report.

Legend



The Legend is the last part of this section. You can adjust the position of the legend on the grid, decide if the legend should be visible (will be explained further in a little while) and decide how the values will be shown (number format).

Position



If the legend is visible, you can move it by clicking a box on the grid and the legend will move to that box.

If you do not wish the legend to be visible, simply uncheck the box as shown above.

Now open the **Date Range** section by clicking the triangle next to the title. This

is where you set your date range for the report.

dates	
✓ in: File Audit Logs Event Date Incident Event Date (mm-dd-yyyy)	Vesterday Last week Last month Last calendar quarter Last fiscal quarter Last calendar year Last fiscal year
event Ca	ncel

You <u>must</u> first pick a date that the report will reference – the Event Date (in the Incident section) is what we recommend as it captures the date of the actual event, not when it was reported.

To select this, in the For: box click the triangle and in the text field at the bottom of the drop down box, start typing the term Event Date. Then select the term and it will populate the

field.

Now you select the Date Range you want the report to reference. You can select the Date Range by using one of the available terms such as Last Month:



lease select the relevant time period:	
All dates	
or: Event Date (mm-dd-yyyy) - in:	
Today	Yesterday
This week	Last week
This month	Last month
This calendar quarter	Last calendar quarter
This fiscal quarter	Last fiscal quarter
This calendar year	Last calendar year
This fiscal year	Last fiscal year
Custom	Last
From:	
to:	

This is a useful tool because if you select a date range such as Last Month, you can run the report (or set it as an auto report) on the first of each month and it will automatically capture the information from the prior month with no need to change dates yourself every time the report is run.

Or by setting a custom date range:

Date Range											
Please select the relevant time period:											
For:	For: Event Date (mm-dd-yyyy)							in:			
	lay	~<	<		April	, 2019)	>	»		
Thi	s week		Sun	Mon	Tue	Wed	Thu	Fri	Sat		
This month		14	31	1	2	3	4	5	6		
		15	7	8	9	10	11	12	13		
Thi	s fiscal di	16	14	15	16	17	18	19	20		
Thi	s calenda	17	21	22	23	24	25	26	27		
Thi	e fiecal ve	18	28	29	30	1	2	3	4		
	s inscar ye	19	5	6	7	8	9	10	11		
Ous			То	day	C	lear				1	
From:										~	
	to:									~	1

This is useful for one-time reports but do not use custom dates for an auto report because it will keep sending you the SAME information for the SAME date range unless you go back into the report and change the date every time, defeating the purpose of an auto report.

To set a custom date range, use the drop-down calendar function and click the correct From: and to: dates by using the calendar. The arrows next to the Month Year at the top of the calendar allow you to move to previous months (single arrow) or years (double arrow).

The final section to complete is **Conditions**. This is where you select the conditions that you want in the report. Conditions determine what files and information are captured in the report. For this Bar Chart, we want to "condition" the File State, General Event Type and Current Level of Care. Selecting and connecting conditions can be tricky and may take a couple of tries until you get the right conditions set. If you set conditions and they are not producing the information you desire, contact Linda and she will be happy to review the conditions and make sure they are set up properly.

The Conditions section will default with a File State criteria to report on files that are New, In-Progress OR Closed. A great way to remember whether you use the OR connector or the AND connector is <u>OR gives you</u> <u>More</u> (will give you more files), <u>AND Bands</u> them together (for example: you can't have a file that is both New AND In-Progress – it has to be Or in this case). If the Condition was in the File State of New AND In-Progress AND Closed, it would give you nothing. Why? Files can't be all those states at once. Remember, OR gives you More – it will give you files that are New OR In-Progress OR Closed – all the valid File States that you need!





- Conditions				
Edit in Full Screen Copy	Paste Clear Expression			
	File State	• equals	* New	• •
	File State	v equals	* In-Progress	• ~
	File State	+ equals	* Closed	

You can also have your File State Conditions be only Active Open files (New or In-Progress). To do this Click on the down carrot next to Closed and select 'Delete Line'.

- Conditions				
Edit in Full Screen Copy	Paste Clear Expression			
	File State	• equals	• New	•
	File State	-	• In-Progress	• •
	File State	equals	▼ Closed	•
				+ New Line
				+ AND
				+ OR
				🕲 Duplicate Line
				🗇 Delete Line

To add another file state to the condition set, select the down carrot next to any line in the condition set and select 'Duplicate Line' and select the additional file state.

Now we want to condition the report to show that we are only going to be searching for files that are falls. This is done through the term General Event Type. To add another condition, you must connect the new condition to the existing entire group of File State conditions.



To add a condition, click on the upwards carrot next to the OR connector and select AND.

- Conditions	Сору Р	aste Clear Expression				
	File	State	*	equals	*	New 🔹 🗸
OR	+ New Line	State	*	equals	*	In-Progress
	+ AND	tate	*	equals	-	Closed 🔹 🗸
	+ OR					
	🖉 Duplicate Group					
	Telete Group					

In the 'Select a Field' box and in the drop down box text field, start typing the term that you want to find. Once you find it, highlight it and click it so that the term is in the Field box.

Conditions Edit in Full Screen Copy	Paste Clear Expression]						
		ile State		•	equals	٣	New	\sim
		ïle State		•	equals	*	In-Progress	
	F	ile State		•	equals	*	Closed	
	Select a Field		Select Operator		Select Value		• V	
	general event	٩						

Select 'Equals' in the Operator box. The Value you select should be FALL.



- Conditions				
Edit in Full Screen Copy Paste C	Clear Expression			
	File State	equals	* New	*
	File State	v equals	* In-Progress	• ~
AND	File State	v equals	▼ Closed	• ~
General Event T	ype 🔹	▼ FALL		

This condition set is done once you have the correct information in the Field, Operator and Value fields. This new condition states that you want files that are New, In-Progress or Closed AND that are the General Event Type of FALL.

Now we need to add the last condition. The final condition will tell the report that we only want valid files that were falls and that occurred within the Skilled Nursing level of care. Remember that everything in PEER is based on conditions, including scope. So, if your scope only allows you to view SNF events, then you don't need this last condition, because that's all you are able to access in PEER. If your scope is broader and allows you to view events that are for more than one level of care, then this condition to limit the report to SNF events only is required.

To add this condition, select the upward carrot next to "FALL" and select '+New Line'. This will add a new line at the same condition set as the General Event Type.

- Conditions				
Edit in Full Screen Copy Paste Clear Expression				
File Stat	e	• equals	*) New	• •
AND File Stat	e	* equals	* In-Progress	• •
- File Stat	e	* equals	* Closed	• ~
General Event Type	v equals	T FALL	•	
			+ New Line	
			+ AND	
			+ OR	
			🕲 Duplicate Line	
			🗇 Delete Line	



Now start typing Current Level of Care into the Select a Field box. The Operator is Equals. The Value is Skilled Nursing/Healthcare. This tells the conditions that you want files that are New, In-Progress or Closed <u>AND</u> that are the General Event Type of FALL <u>AND</u> that happened to residents with the Current Level of Care of Skilled Nursing/Healthcare.

- Conditions						
Edit in Full Screen Copy	Paste Clear Expression					
33	File State	,	•	equals	*	New
	GR File State	,	*	equals	*	In-Progress 🔹 🗸
	File State	,	•	equals	*	Closed 🔹 🗸
-	General Event Type	v equals		T FALL		• •
	Current Level of Care	* equals		Skilled Nursing/Healthcare		

Now the report is ready to run. To run the report, click the green Run Report button.



Here is a picture of the report with the legend visible:





In this case, the legend is not offering information that is terribly helpful and it is taking up room on the page. To remove the legend, or to do any adjustments to the report, you need to go back into the report through the Report Editor button. This button is in the pencil icon at top left.



After clicking the Report Editor button, the report will open again and changes can be made in any of the five sections.



To remove the visibility of the legend, go to the Chart Report Details section and find the Legend Visibility checkbox. Uncheck the box so that it is empty. The legend will disappear from the grid in the Report Editor as well. Now click the green Run Report button again.

This is the report without the legend.





Paging

Page break by Group

Creating a Simple List Report

To create a Simple List report, the beginning is the same. Click on the **New Report** button within the Report Center. This Simple List report will track the event date, event number, resident name, current level of care, and reported event severity for falls that occurred Last Month.

Report Editor • Report Type		In the Rep module "I	oort Type sect Risk"). The St	tion, sele tyle for t
Style	Module	when you	select this Ty	/pe, the
♥ ○ Pie Chart	 Risk Feedback Claims 	Documen	t Report Deta	ils.
 Line Chart Bubble Chart Simple List Report Crosstab Report 	Infection RootCause PeerReview Risk Register	In the Titl Chart dire	es section, ty ections.	pe in yo
	Orientation Portrait Landscape	In the Doo than that informatio	c ument Deta i of a Bar Char on you want l	i ls sectio t. Fields isted in t
▶ Titles				
- Document Details ┥ 🚃	_	To add a f	ield, click on	the plus
Field Name Function	n Sort	S		
 Document Details 				
Field Name	Function	Sort	Sort Sequence	Summary
Display				

Lines

Verticals

Horizontals

In the Report Type section, select your Style and Orientation (select the module "Risk"). The Style for this report is Simple List Report. Note that when you select this Type, the Report Details section title becomes the Document Report Details.

In the **Titles** section, type in your title(s) and variables as noted in the Bar Chart directions.

In the **Document Details** section, the information requested is different than that of a Bar Chart. Fields should be added based on the information you want listed in the report.

Width

o add a field, click on the plus sign (+) below the Field Name bar.

Type the term you want to find in the text field at the bottom of the drop down. The first fiel	d in this report is
Event Date. Highlight the term when you locate it and click it to populate the field.	

Show the grand total for unique:

Show the page total for unique:

Totals



- Document Details

F	File Audit Logs	^
	Event Date	
	Incident	
	Event Date - Trend Day	
	Event Date - Trend Fiscal Quarter	
	Event Date - Trend Month	
	Event Date - Trend Month	
	Event Date - Trend Quarter	
	Event Date - Trend Quarter	
_	Event Date - Trend Week	
► D	Event Date - Trend Year	
• C	Event Date (mm-dd-yyyy)	
	Event Date (mm-dd-yyyy) - Trend Day Of Week	
	Event Date (mm-dd-vvvv) - Trend Fiscal Year Month	•
	event date	Cancel

There are a lot of choices for Event Date in this drop down! For the purposes of the Simple List Report, only the basic Event Date (under the heading "Incident") is necessary. The other choices can be used for trending, but this is a more advanced function. For more information on how to capture trending information, contact FSA PEER Support Services for additional help and training.

Once the field has been added, continue to add the fields necessary to complete the information in the report.

Document Details

Page break by Group	✓ Verticals ✓ Horizontals	Show the gran	nd total for unique e total for unique:	: Event Date (n	nm-dd-yyyy) ▼
Paging	Lines	Totals			
Display					
Reported Event Severity	() () ×	None •	None •	T	None 🔻 🚺
Current Level of Care	(+)(+)(×)	None •	None 🔻	T	None 🔻 🛛 1
First Name		None •	None •	•	None 🔻 🚺
Last Name		None •	None •	•	None 🔻 🚺
FileNr		None •	None •	•	None 🔻 🚺
Event Date (mm-dd-yyyy)		None •	None •	•	None 🔻 🚺
Field Name		Function	Sort	Sort Sequence	Summary Width

Note that the term for the Event Number is FileNr and that the *Last Name* and *First Name* are separate. Using both Last and First Names allows you to sort alphabetically. If you choose the term "Name" it will show the resident's full name but will sort alphabetically by the first name only.

You can group information together by using the tabs indicated in the Report. You can also change the order of the information by clicking on the arrows pointing up and down. To change the information so that it groups the resulting list by Current Level of Care, move the field up to the top and then tab over right below that term as noted below.

Click the Up Arrow

field to the top.

button to move the

Summary Width

Non∈ ▼

None •

1

1

Sort Sequence

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							THOIR -		
First Name		None	•	None	T	•	None 🔻	1	
Current Level of Care		None	•	None	v	•	None 🔻	1	•
Reported Event Severity		None	•	None	v	•	None 🔻	1	
0									
ocument Details									1
ield Name		Function		Sort		Sort Sequence	Summary	Width	Click the
ield Name		Function		Sort		Sort Sequence	Summary	Width	Click the
ield Name Current Level of Care	OX	Function None	T	Sort None	T	Sort Sequence	Summary	Width	Click the button n
ield Name Current Level of Care Event Date (mm-dd-yyyy)		Function None None	v	Sort None None	T	Sort Sequence	Summary None None	Width 1 1	Click the button n when yo
ield Name Current Level of Care Event Date (mm-dd-yyyy)		Function None None None	v v	Sort None None	• •	Sort Sequence	Summary None None None	Width 1 1 1 1	Click the button r when yo
ield Name Current Level of Care Event Date (mm-dd-yyyy) FileNr Last Name		Function None None None None None	• • •	Sort None None None	T T T T	Sort Sequence	Summary None None None None None None None None None	Width 1 1 1 1 1 1 1	Click the button r when yo to group
ield Name Current Level of Care Event Date (mm-dd-yyyy) FileNr Last Name First Name		Function None None None None None None	V V V V V V V V	Sort None None None None	• • • •	Sort Sequence	Summary None • None • None • None •	Width	Click the button r when yo to group informat

Sort

None

None

•

Function

None

None

CC

Click the Indent/Tab button next to the field when you want to start to group the information.

Fields can be added or adjusted (moved up, down or grouped) after the report is run by entering the Report Editor button and making the adjustments. Sometimes it is helpful to see how the information looks before you make adjustments.

Next complete the **Date Range** section. Remember to complete the For: field and indicate the time period that should be captured for the report. In this report, the Date Range is Last Month.

Finally, complete the **Conditions** section. The conditions for this report will be a valid file state (New, In-Progress or Closed) with the General Event Type of FALL.

Conditions Edit in Full Screen Copy Paste Clear Expression		
AND V CR V File State	* equals * New * * equals * In-Progress *	✓
File State	* equals * Closed * * FALL * V	$\mathbf{\vee}$



- Document Details

Event Date (mm-dd-yyyy)

Field Name

FileNr

Θ





Run the report by clicking the green Run Report button. This is a sample of what you may see. Note that the events are grouped by Current Level of Care and that there are 23 pages in this report.

Report Center Recently run repor	r ts						
Report Manager	Denominators	Report					
D• 🖊 🕥	🗗 🖶 🔨	阔 🖪 Page 👔	✓ of 2 ▷ 🕅		~ ↓		
		ſ					
					Falls Last Mont	h	
			(Event Date (mm-dd-yyyy) is with to "C	in March, 2019) and (((losed")) and (General E	File State is equal to "New", vent Type is equal to "FALL) or (File State is equal to "lr ")) and (((Scope is equal to "	n-Progress") or (File State is equal All")))
			Event Date (mm.dd	FiloNr	Last Namo	Eirst Namo	Poportod Evont
			yyyy)	FileINI	Last Name	First Name	Severity
			03-21-2019	INC_230655	D	D	Severity Level 1-No Harm/Damage
			03-20-2019	INC_230654	MICKEY	MOUSE	Severity Level 2- Temporary Minor Harm/Damage
			03-20-2019	INC_230658	TEST	TEST	Severity Level 2- Temporary Minor Harm/Damage
			Current Level of Care: A	ssisted Living/Per	sonal Care		
			Event Date (mm-dd-	FileNr	Last Name	First Name	Reported Event
			yyyy)			ThistName	Severity
			03-25-2019	INC_230660	JAGGER	MICK	Severity Level 1-No Harm/Damage

Here is the report after going in to the Report Editor and changing the orientation to Landscape. Note: the N/S on Current Level of Care means there was no level of care, so these are visitor, volunteer or affiliate events which don't have a level of care. If you wanted to only show resident events, you could add the condition of Classification of Person (field name) equals (operator) Resident (only resident events, not those that are visitors, volunteers or affiliates).



Falls Last Month

(Event Date (mm-dd-yyyy) is within March, 2019) and (((File State is equal to "New") or (File State is equal to "In-Progress") or (File State is equal to "Closed")) and (General Event Type is equal to "FALL")) and (((Scope is equal to "All")))

Current Level of Care: <n s=""></n>				
Event Date (mm-dd-yyyy)	FileNr	Last Name	First Name	Reported Event Severity
03-21-2019	INC_230655	D	D	Severity Level 1-No Harm/Damage
03-20-2019	INC_230654	MICKEY	MOUSE	Severity Level 2-Temporary Minor Harm/Damage
03-20-2019	INC_230658	TEST	TEST	Severity Level 2-Temporary Minor Harm/Damage

Current Level of Care: Assisted Living/Personal Care

	0			
Event Date (mm-dd-yyyy)	FileNr	Last Name	First Name	Reported Event Severity
03-25-2019	INC_230660	JAGGER	MICK	Severity Level 1-No Harm/Damage

Reports and Scopes

Every file manager has a scope in PEER. The scope determines what the file manager can see and is based on organization and levels of care or locations within the organization. When running a report, the report will only populate with the information allowed within the scope of the person running the report. If someone with the scope of all levels of care creates and saves the report, when another file manager runs the report it will only report information allowed within his/her scope.

Save a Report

Once the report contains the information you intended, you can save the report. It is very important that you pay attention to how to name your report and what folder to use when saving it.

When you have created a report and run it <u>or</u> run a report that someone else created and want to save it to use for yourself, it must be saved in your organization's specific folder.

The Save button is located at the top of the page once you have run the report.



Report Cente Recently run report	r rts					
Report Manager	Denominators	Report				
D• 🖊 🕥	<u>∎-</u> = ≺-	N 🕥 Page 1	✓ of 2	D 🕅 🎽	PDF v	₹

Click the Save button to name the report and place it in the folder of your organization.

Everyone who is a file manager with reports has access to the report folders. Each organization has its own folder in the report center found in the Report Explorer. Only access reports that are in your organization's folder or that are in the public folders named Falls, Medication or RM reports.

When naming your report, ALWAYS put your initials first. This allows everyone at your organization that has access to the Report Explorer to know who created and "owns" the report.

Save As		Save As		Save As	
Name * TST F	alls by Specific Event Type	Name • TST Falls by Specific E	vent Type	Name 🔹	TST Falls by Specific Event Type
Description	я.			Description	
To • Sel Public My Re Other	ect folder عوorts (Private) 'Users' Reports	To ← Public Medication reports RM Reports Medical Director Report PCCP Reports ONLY Laurel Circle ONLY Souderton Mennonite (Medford Leas ONLY Pennswood ONLY		To •	← PCCP Reports ONLY

When the **Save As** box pops up, you will always select Save as a new report. Type in the report name – using your initials first – and then select the dropdown beside "To". Click on the folder it belongs to. When saving a report, you do not have to open the folder, just click on the folder name and the report will be saved there.

DO NOT click Overwrite an existing report – this will replace the existing report with your name and can cause a problem if that report is owned by someone else or if it is used in an auto report. Once you have saved your report, it will take you back to the screen with the report.



Report Center Recently run report	f ts						
Report Manager	Denominato	ors	Re	port			
Quick Links	🗲 Hide	C	reate	Clear Hi	story	M	lore -
Favorites			Module			Pope	wt Namo
Recently run report	ts	-	wodule			керс	it name
Report Manager Adı	min Picks		Risk			≣	test
All snapshots			Risk			≡	Unsaved Reports 7
Search all reports			Risk			≡	Unsaved Reports 6
			Risk			ht	Unsaved Reports 5
Folders	Options 👻		Risk			ht	Unsaved Reports 4
My Reports (Pr	ivate)		Risk			ht	Unsaved Reports ³
Other Users' Re	eports		Risk			hi	Unsaved Reports ²
Public 🔲 Public			Risk			h	Unsaved Reports 1

If you then click on the **Report Manager tab** and select the **Recently run reports** Quick Link, you will see each version of the report in your Session History.

Find a Saved Report

Report Manager	Denominato	ors	R	eport		
Quick Links	← Hide	C	reate	More -		
Recently run report	~			Module	Report Name	Report ID
Report Manager Ad	min Picks		☆	Risk	All Events 2012	<u>1001041</u>
All snapshots			☆	Risk	CAW AG Serious events for RMC	1002167
Search all reports				Risk	CAW All Events FY 11-12	<u>1000921</u>
			☆	Risk	CAW All Falls for PC by org 2012	1001049
Folders	Options +			Risk	CAW All Falls SNF by Org for FY	1001958
Medication re	eports		☆	Risk	CAW Broadmead Trend for all Ey	1002093
Mennonite Vi	llage		☆	Risk	CAW Broadmead Trend for Seve	1002094
Monthly			☆	Risk	≡ <u>CAW CCSS Report</u>	1001351
PCCP Reports	5 ONLY		☆	Risk	CAW daily serious event report	1002543
Peer Review			☆	Risk	CAW DM Events by Gen Loc	1001355
Pennswood C			☆	Risk	CAW DM events by Severity	1001359
Peter Becker RM Reports	Com		☆	Risk	CAW DM Events by Type	1001364

To locate and run a saved report, go to the Report Center. In the Report Center, click on the **Public** folder to expand and see the subfolders. Select the folder containing the name of your organization. Once you have selected the folder, a list of the reports in that folder will show in the main display area of the Report Center.



Find the report you wish to run and click the report name to run it. If you would like to edit the report without

running it, click the checkbox to the left of the report and then select Edit from the top of the screen. The Edit button only becomes available when a box beside a report is checked.

E	dit	Delete Copy To More 👻		
		Module	Report Name	Report ID
	☆	Risk	All Events 2012	<u>1001041</u>

Note that there is a column with the word Scheduled on the right.

Report Name	Report ID	Report Owner	Description	Scheduled
All Events 2012	<u>1001041</u>			0

If there is a number in this column, this is a report that is set up in a schedule to be sent to a recipient list established by your Risk Manager or by the FSA Risk Management program. Do not overwrite ANY of these reports unless you are the owner and wish to change the format at the request of the recipients.

Export a Report

There are different ways you can export a report from PEER. You can:

- 1. Send a report by email as a link or as an attachment
- 2. Export a report and save it to your computer
- 3. Export data source

To send a report by e-mail as a link or as an attachment, click the Send report by email button.

Report Manager	Denominators	Report		() · · · · · · · · · · · · · · · · · ·
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A box will pop up with the following choices:





If the recipient of the report is not a file manager in PEER or if he/she does not have scope to see everything you want him/her to see in the report, choose Email PDF document.

If the recipient of the report is a file manager and has the scope to see everything you want him/her to see, you can select Email Link to report.

Please note – If you are e-mailing this report as a PDF to someone outside of PEER and it contains PHI (Protected Health Information), be sure that you follow your organization's policies on HIPAA Privacy and Security, and send it encrypted if required. Bar and Pie Charts often do not contain PHI but list reports most likely will.

nail Report as PDF Document	
Send Via: 💽 Client 🔘 Server	
Subject:	
Document attached: test.PDF	
The document test.PDF was attached by RL Solutions on 04-10-2019 at 15:27.	
Thank you.	

Once you select PDF or Link, the following box will appear. We recommend Send Via Client (default setting). A pop up box will appear on the bottom (like it does when you email follow up in a PEER file) and when you click open, it will take you to Outlook where you can type in the

recipient's name. If not, select Send Via Server and PEER will send the report to the e-mail addresses you type in the To: field. You must also complete the Subject field before clicking OK.

When e-mailing a report, the reason to select Send Via Client, if your e-mail functionality is set up, is that you will have a send receipt in your Outlook mailbox that the report was sent.

Note: The pop-up box will not go away once you have selected OK and e-mailed the report. This pop-up function allows you to send the same report to additional individuals but can be confusing when it doesn't go away after clicking Send in Outlook. You must click Cancel to exit the pop-up.

To export a report and save it to disk, select the file type you want to export:





The three most common file types used are Pdf, XLS and Image. Pdf is an Adobe Acrobat PDF file, XLS is an Excel spreadsheet and Image is a picture file.

Now click the following button:



You should immediately get a security notice (and hear a little blip sound) when you click to export the report. It will look something like the blue bar at the top of the screen below OR a yellow pop-up box down at the bottom of the screen:

📥 To h	👆 To help protect your security, Internet Explorer blocked this site from downloading files to your computer. Click here for options 🗙					
rlso	lutions	۲. Ri	.6:Software for Safer Healthcare			
	Report Center					
n						
0		Falls by Specific Event Type in SNF				

Click on the bar and select the choice of Download File. The bar will disappear.

📥 To help protect your security, Internet Explorer blocked this site from downloadin	Download File	chere for options 🗙
rlsolutions	What's the Risk?	RL6:Software for Safer Healthcare
Report Center	Information Bar Help	

Now you select the export file type again and click the same Export button:

Page 1 🗹 of 3	
	Export a report and save it to the disk
	Rtf



You will see a grey pop up box that will prompt you to Open or Save (Example 1) OR you will see a yellow box appear at the bottom of the screen (Example 2). You can choose to open it and view it before saving the file or just saving it in a folder on your computer.

Example 1		
File Download		
Do you want to open or save this file? Image: MyXtraReport.png Type: PNG Image; 38.6KB From: rl6.rlsolutions.com Open Save Cancel Image: While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?		
Example 2		13
Do you want to open or save MyXtraReport.pdf (56.4 KB) fro	m rl6.rlsolutions.com?	Open Save Cancel ×

This will allow you to access the information later or to use the exported file to include in another document such as a Quality or Risk Management meeting report.

The final choice in this guide is Export data source. This allows you to export the data only from a report into an Excel spreadsheet. To do this, select the CSV file type. Click on the arrow button indicated below:







Alternatively, you can also right click on the report from the Report Center and select **Export data source.** This will achieve the same outcome, however, any extraneous text will be left out and only the data and column/row labels will be included.

For the Falls by Specific Event Type in SNF bar chart, the data will populate in the spreadsheet like this:



	Data Re						
Pa	aste	Calibri BB <u>I</u> U	• 11 • 🖽 • 🏒	A A > <u>A</u> -		- ≫- :≢ :≢	
Clipboard 5			Font	5	Alig	Inment	
	A1	-	<i>f</i> _∗ FileNr				
	А	В	С	D	E	F	
1	FileNr	Specific Ev	vent Type				
2	15	15 during transfer					
3	63	from bed					
4	44 from chair		r				
5	23	23 from low bed					
6	3	from mec	hanical lift				
7	12	from toile	t/commod	e			
8	44	from whe	elchair				
9	9	9 intercepted fall					
10	7	other					
11	114	unknown	- found on	floor/unw	itnessed		
12	4	while amb	oulating to	bathroom			
13	8	while ambulating with assistive device					
14	8	while ambulating with person assist					
15	9	while ambulating without assistive device					
16	16	while ambulating/standing					
17	2	while being supported by caregiver					
18							
19							
20							

This type of export is very useful if you do any kind of rate based reporting for your organization. It allows you to manage the information from a report in a spreadsheet so that you can change the way the information is formatted, add calculations or simply want the numbers, not the pictures or charts.

In this chart, you can change the titles in the first line, change the width of the second column and have a totally different way of showing the data. You can also add any spreadsheet functions to show totals or averages, etc.

This guide is intended to help you begin the creation of reports. Once you feel more comfortable and have time to create different types of reports, the possibilities are endless! For additional training or guidance, please contact FSA PEER Support Services and we will help you in any way we can.