PEER Risk Manager Training

Agenda

- Requesting **a New Account**
- User Roles
- User Scopes
- Icon Walls
- Updating Locations Lists
- File Management
- Alerts/Schedules
- Personal Views
- CCSS Reporting
- FSA Website

How do I request a new account?

New Accounts

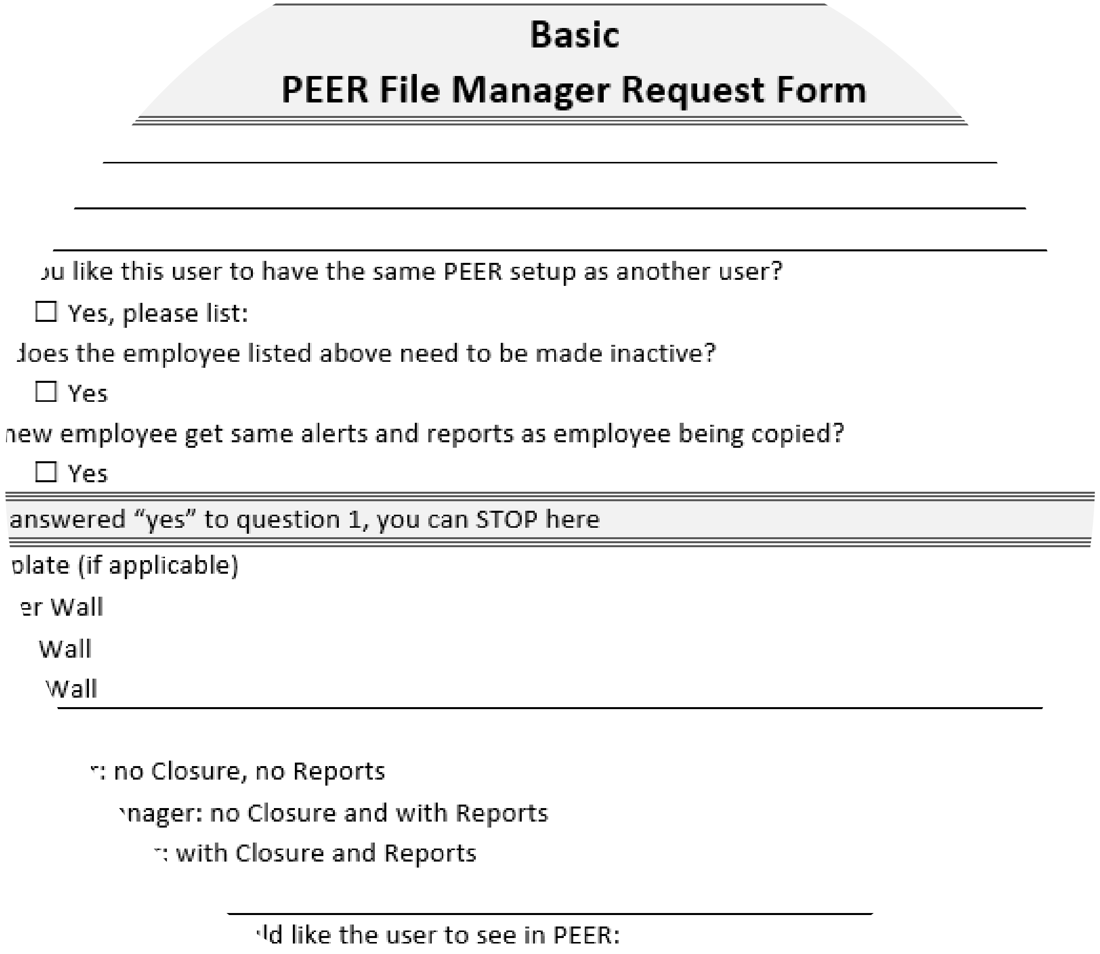
Completing the PEER File Manager Request Form

Your organization has a file manager request form that has been made specifically for you

Completing the form is simple

Complete the first section if you would like to mirror the permissions of another user

Complete the bottom section if you would like to create a new user with their own role and scope


Basic
PEER File Manager Request Form

ɔu like this user to have the same PEER setup as another user?
☐ Yes, please list:
ɔoes the employee listed above need to be made inactive?
☐ Yes
new employee get same alerts and reports as employee being copied?
☐ Yes
answered "yes" to question 1, you can STOP here
plate (if applicable)
er Wall
Wall
Wall
: no Closure, no Reports
nager: no Closure and with Reports
: with Closure and Reports
ld like the user to see in PEER:

What is a User Role?

Roles in PEER

- Roles in PEER are what the user is able to do within the system
- To the right, are common roles that we use in PEER, as well as a sample of what each role is able to do
- The roles selected by your organization will be listed on your PEER File Submitter form

Risk Manager

- Can submit files
- Can view files submitted by others
- Can add follow-up
- Can run reports
- Can close files
- Can submit files to CCSS

File Manger, closure, reports

- Can submit files
- Can view files submitted by others
- Can add follow-up
- Can run reports
- Can close files

File Manager, no closure, reports

- Can submit files
- Can view files submitted by others
- Can add follow-up
- Can run reports
- Cannot close files

File Manger, no closure, no reports

- Can submit files
- Can view files submitted by others
- Can add follow-up
- Cannot use reports
- Cannot Close files

File Submitter

- Can submit files only

What is a User Scope?

Scopes In PEER

Scopes are what a user will see in PEER

Scopes can be used to manage workflow by only showing a file manager the files they need to concentrate on

The example to the right shows how broad and complex a scope can be made

How Roles and Scopes work together

Nurse	HR Manager	Social Worker
Role: File Manager no closure, reports	Role: File Manager no closure, reports	Role: File Manager no closure, reports
Scope: All events in Skilled Nursing	Scope: All Employee Events	Scope: All Complaint/Grievance Events

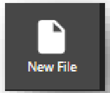
Each user in PEER has a role and a scope

In the example to the left, you can see that the nurse, HR manager, and the social worker all have the same role. This allows them all to manage files and pull reports. They have different scopes, which means the files they see in PEER will be different.

What is an icon wall?

Icon Walls

When a user logs in and clicks the New File icon, they will see their icon wall



The icon wall is a custom grouping of events that you select

We recommend a maximum of 3 different icon walls per organization

Commonly, organizations will have one icon wall for:

- File submitters
- File Managers
- Risk Managers

You can make changes and update the events available on your icon walls by emailing the FSA PEER Services Group.

What events can I track through PEER?

Fall	Skin Tissue	Medication/Fluid Error	Safety/Security/ Conduct	Elopement/ Wandering
Care/Service Coordination	Complaint/Grievance	Diagnosis/Treatment	Environment	Good Catch
Lab Test/Diagnostic Test	Root Cause	Covid-19	**Deficiency** by DOH or Above	Reportable Request for Medical Records
Infection	Employee General Event	Concern Report	Missing/Damaged Items	

Recommendation for Icon Walls

File Submitter Wall

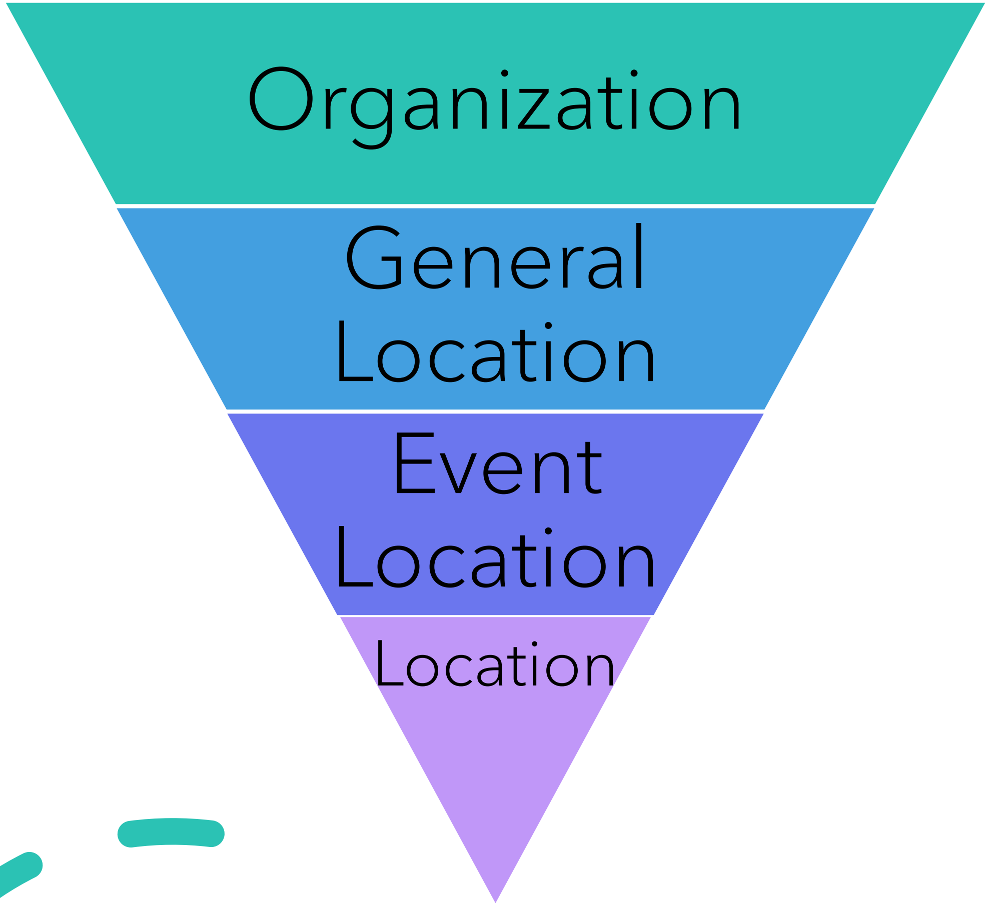
File Manager Wall

Recommendation for a Risk Manager Icon Wall

Other available events

How do I update my locations?

Adding and Removing Locations



Location lists are organized in 4 levels

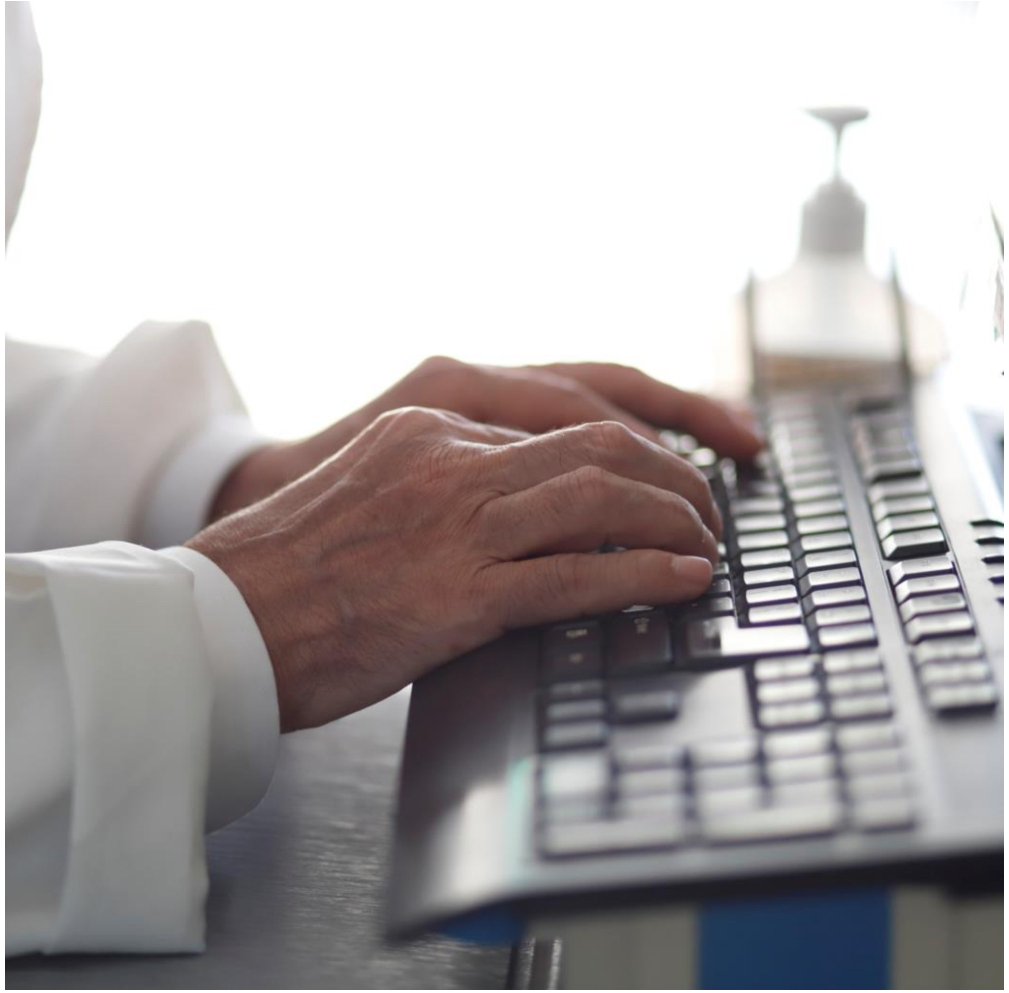
You can make updates to your location list at any time

You can also ask for an export of your location list at any time

Incident=>Organization	Incident=>General Location	Incident=>Event Location	Incident=>Location
FSA	1st Floor	Participant Area	Activity Area
FSA	1st Floor	Participant Area	Small Dining Room
FSA	1st Floor	Participant Area	Large Dining Room
FSA	1st Floor	Participant Area	Kitchen
FSA	1st Floor	Participant Area	Art Room
FSA	1st Floor	Participant Area	Parlor
FSA	1st Floor	Participant Area	Hallway
FSA	1st Floor	Participant Area	Quiet Room
FSA	1st Floor	Participant Area	Nurse's Office
FSA	1st Floor	Administrative Area	Office
FSA	1st Floor	Administrative Area	Reception Area
FSA	1st Floor	Administrative Area	Therapy Room/Conf Room
FSA	1st Floor	Administrative Area	Salon
FSA	1st Floor	Lobby	As Indicated Above
Please enter new locations below this line.			

Example location spreadsheet

How do I manage files?

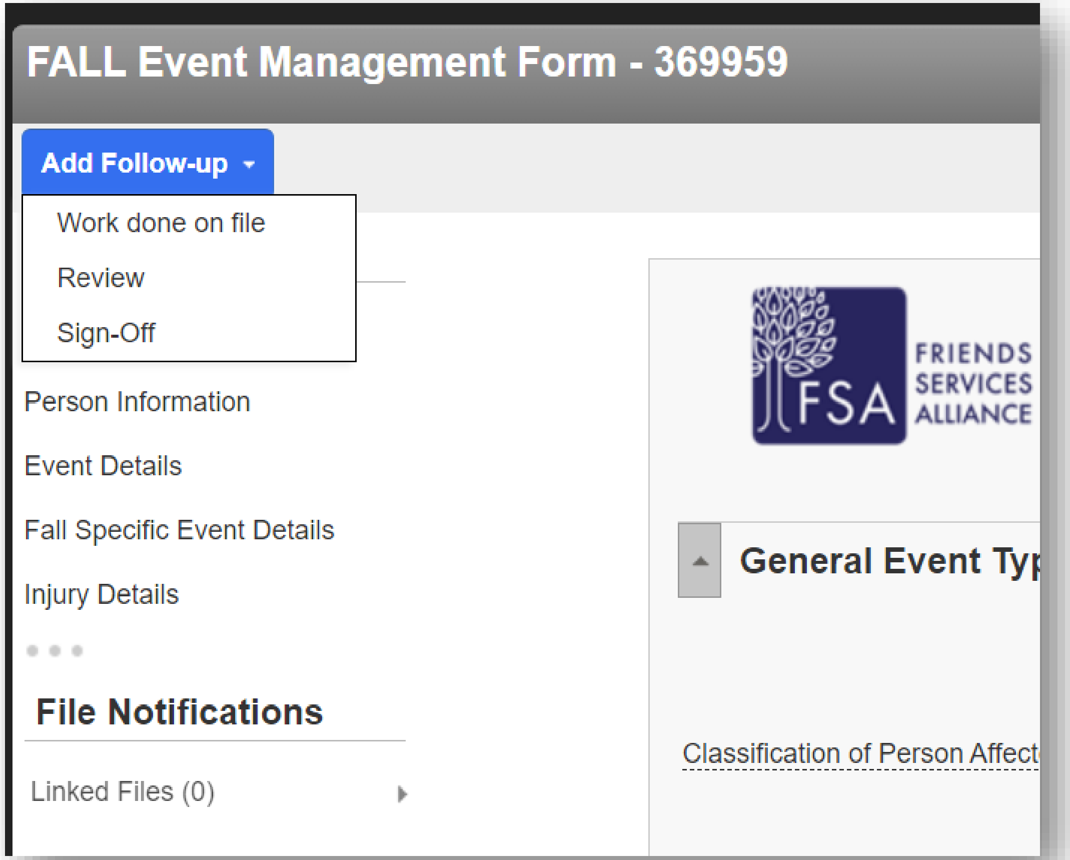


Adding Follow-up

After an event is submitted, you will be able to add follow-up.

There are 3 types of follow-up:

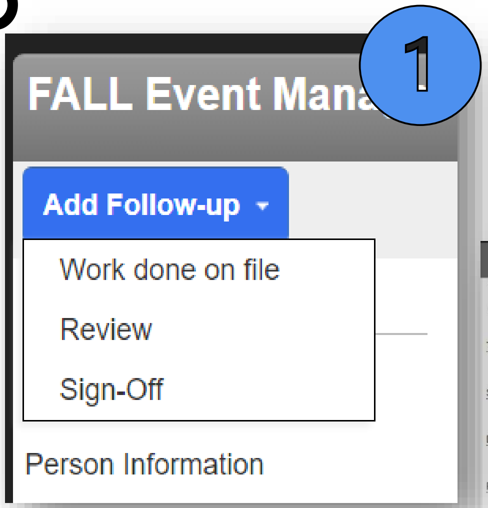
- Work done on file
- Review
- Sign-off



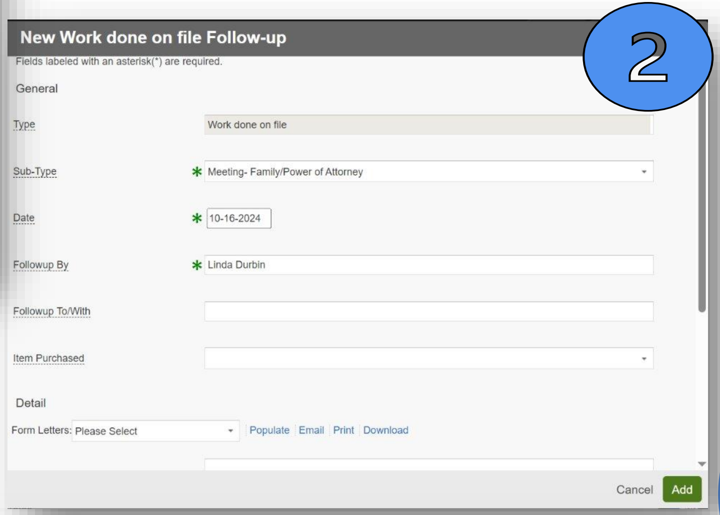
Steps to Add Follow-up

Step 1: Open the event you want to manage and click on the blue "Add Follow-up button

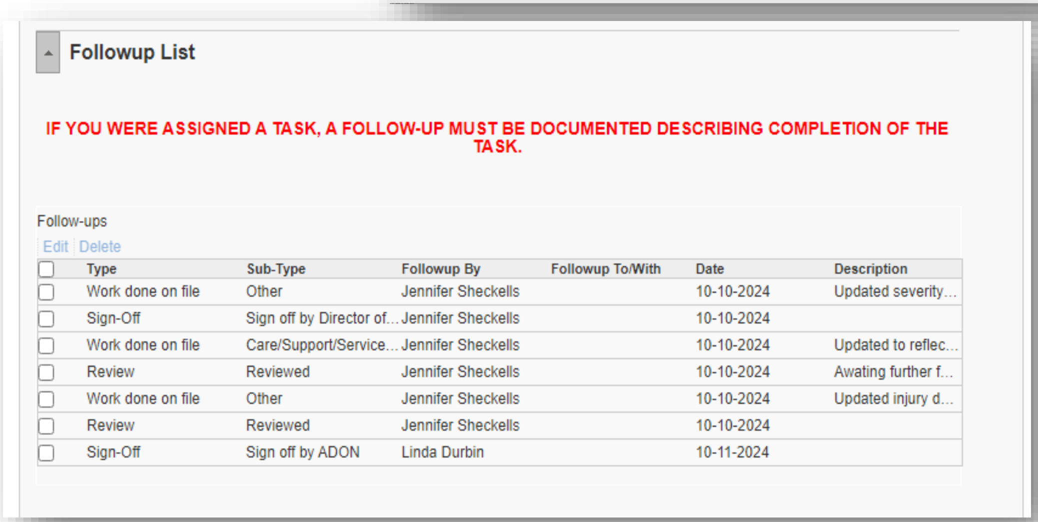
Select follow-up type from the dropdown



Step 2: Complete the information in the pop-up box and click the green "Add" button



Your follow-up will now appear in the event form


Followup List

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

Follow-ups

Edit Delete

	Type	Sub-Type	Followup By	Followup To/With	Date	Description
☐	Work done on file	Other	Jennifer Sheckells		10-10-2024	Updated severity...
☐	Sign-Off	Sign off by Director of...	Jennifer Sheckells		10-10-2024	
☐	Work done on file	Care/Support/Service...	Jennifer Sheckells		10-10-2024	Updated to reflec...
☐	Review	Reviewed	Jennifer Sheckells		10-10-2024	Awating further f...
☐	Work done on file	Other	Jennifer Sheckells		10-10-2024	Updated injury d...
☐	Review	Reviewed	Jennifer Sheckells		10-10-2024	
☐	Sign-Off	Sign off by ADON	Linda Durbin		10-11-2024	

Follow-up Work done on file

Use "Work done on file" to document any of the below actions:

- Care/Support/Service Plan Update
- Chart Review
- Clarification: Request
- Clarification: Response
- Consultation
- Corrective Action
- Grievance Resolution
- Investigation
- Investigation Completed
- Meeting
- Meeting- Family/Power of Attorney
- Meeting- Employee/Provider/Affiliate
- Meeting- Resident/Client/Member
- Policy/Procedure Review
- PSAE Committee Meeting
- QI Initiative
- Re(Education) of Staff
- Rehospitalization
- Root Cause Analysis
- Task Completion
- Other

Follow-up Review

Use "Review" to the document the following actions:

- Final Review by Manager/Director before Close
- Interdisciplinary Review
- Level of Care Review
- Review by onsite Risk Manager
- Reviewed

Follow-up Sign-off

Use Sign-offs to signal that you have completed your work with the event

- Sign off by ADON
- Sign off by Care Coordinator
- Sign off by C Suite (CEO/COO/CFO)
- 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 onsite Risk Manager
- Sign off by PCCP Risk Management Team
- Sign off by PCH/AL Administrator
- Sign off by Pharmacy
- Sign off by Physician/Nurse Practitioner
- Sign off by Social Worker

Closing a File

Once all sign offs are complete, you'll want to close the file

There are two ways to do this:

- From within the file
- From the info center

Note: Once a file is closed, it will disappear from the Info Center View. It will still be available in Search and will be available for reports

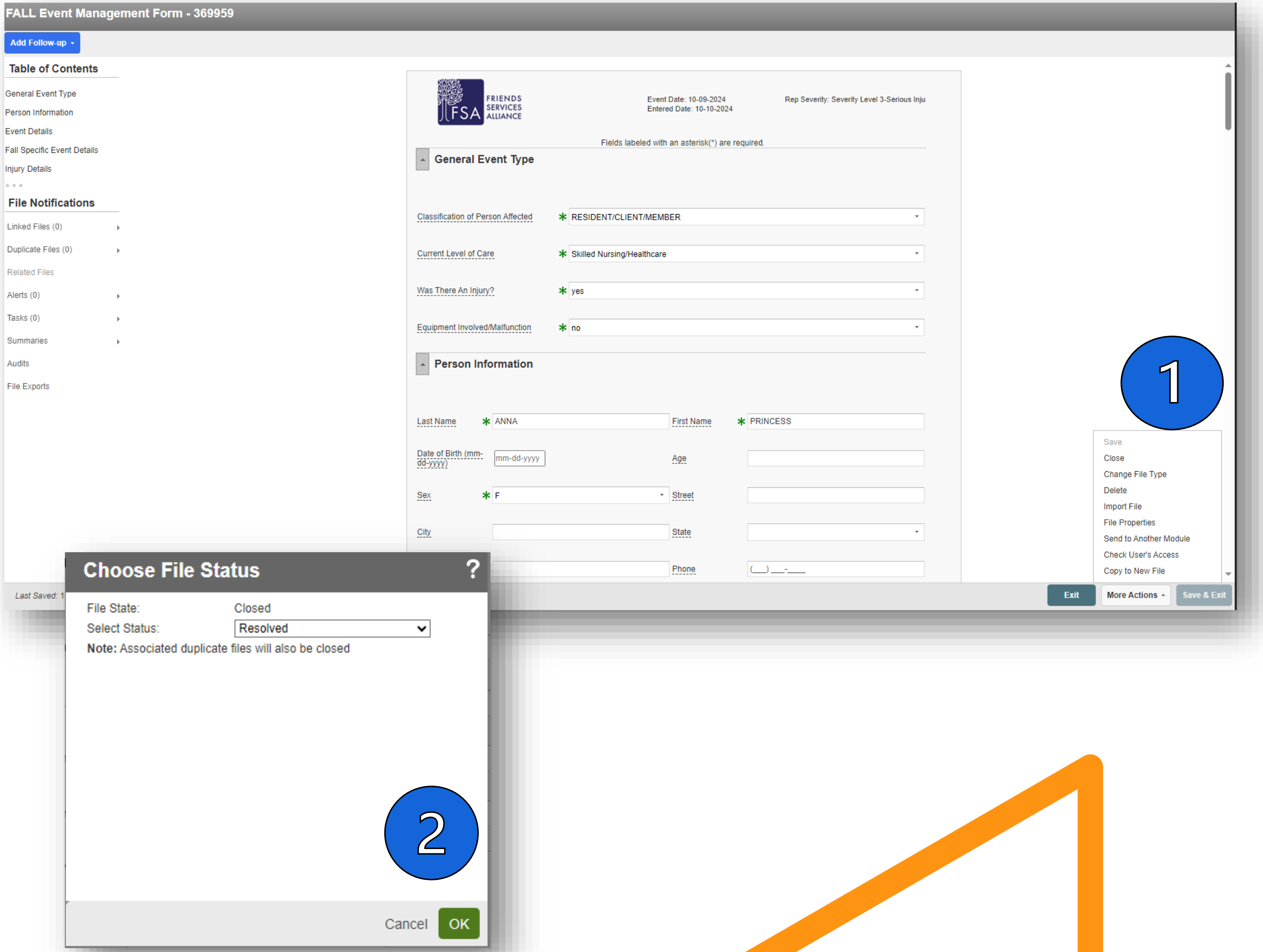
Closing From within the event

Locate the event in the info center or search

Open the event

1. From the "More Actions" tab in the lower right, select Close
2. Dialog box will open, keep status as resolved if it has been resolved and click Ok

File will now be closed



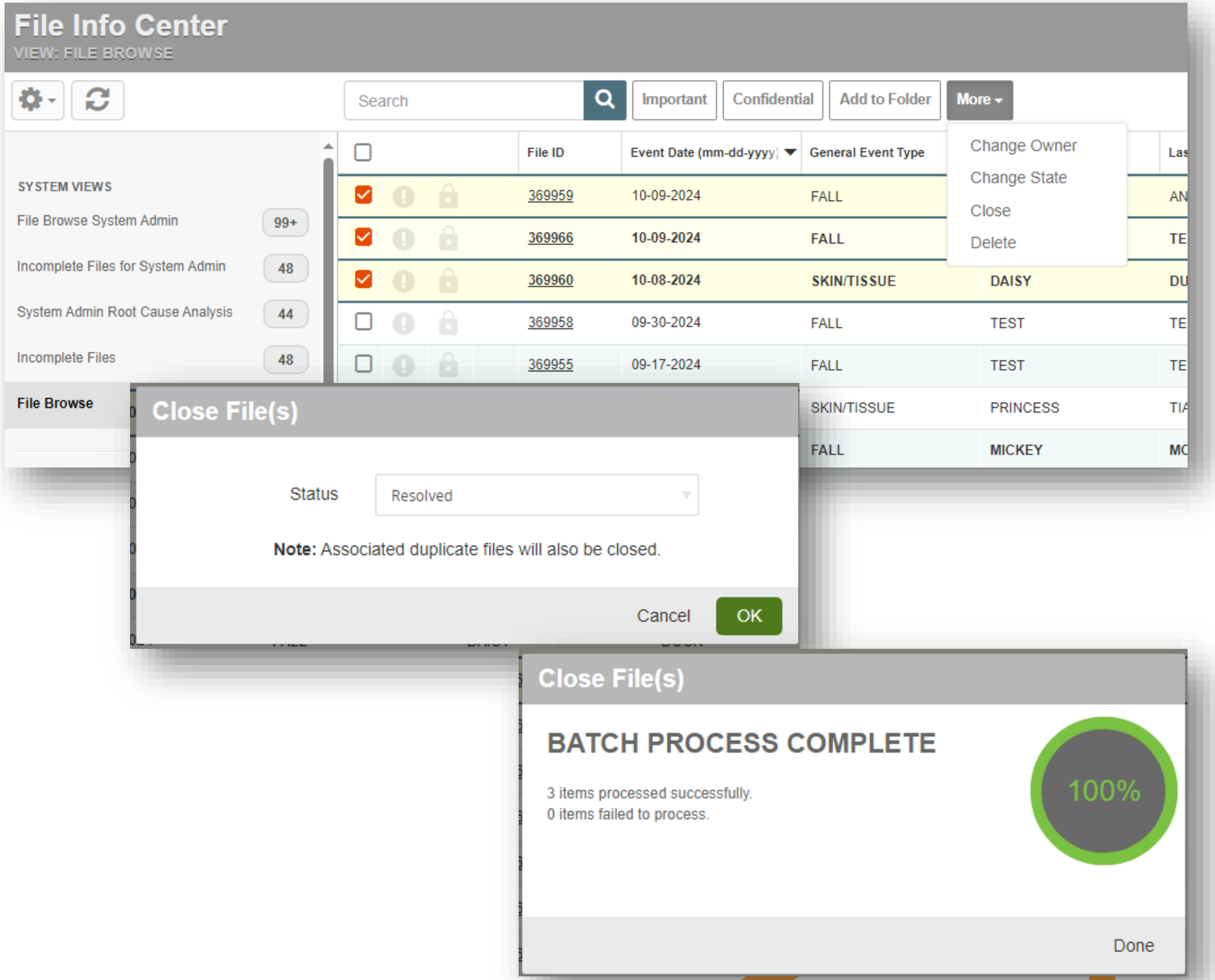
Closing from the Info Center

You can close files from the main info center view

You can close one file or multiple files

To do this:

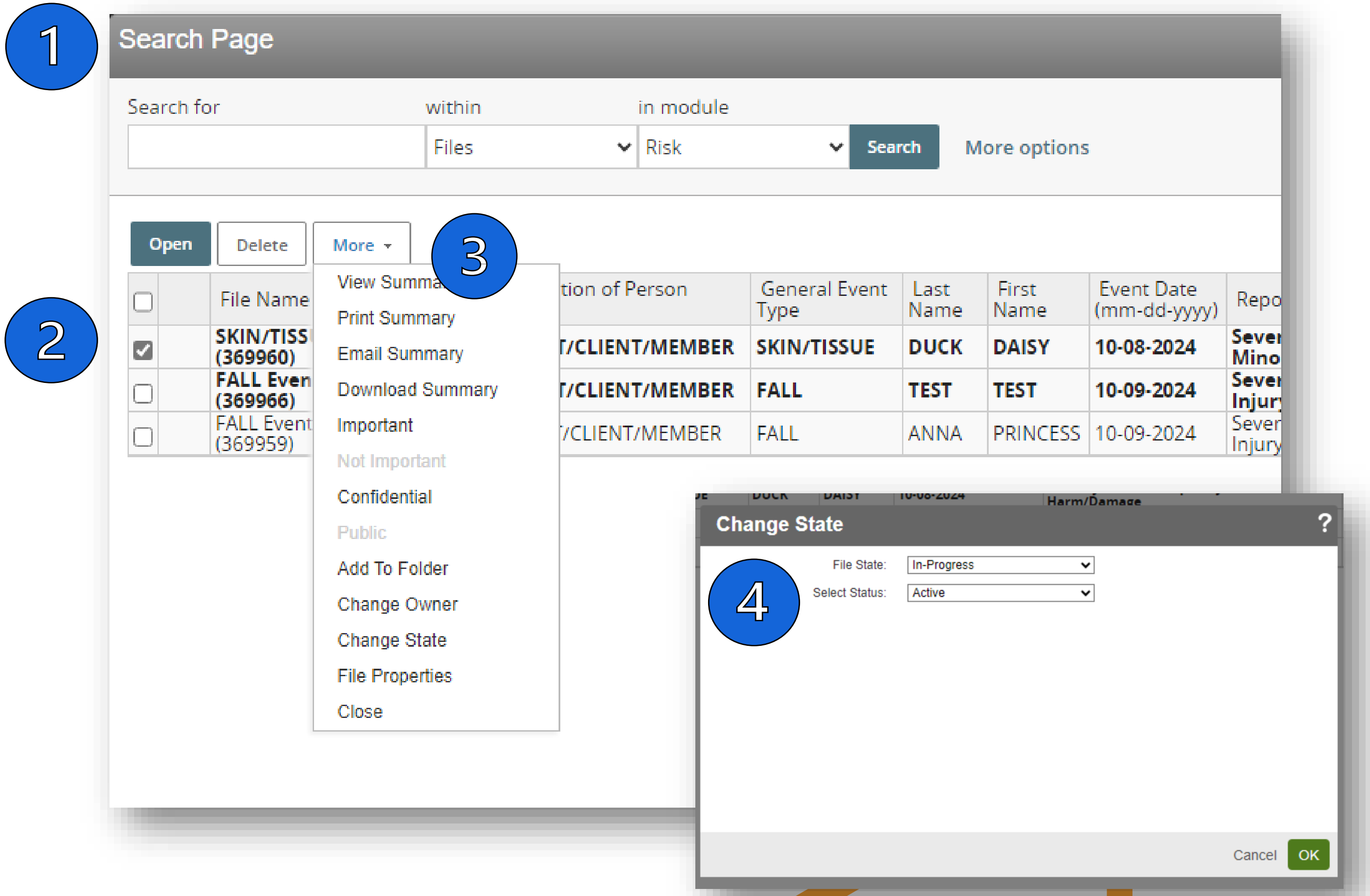
1. Check off the file(s) you would like to close
2. From the More dropdown, select "Close"
3. You'll receive another popup that tells you the batch close is complete



Reopening a Closed File

You can find closed files in search

1. Locate the file you need to reopen
2. Check of the file (this will make the options appear for step 3)
3. From "More" dropdown, select "Change State"
4. Change the File state to "In-Progress" and Select State as "Active"

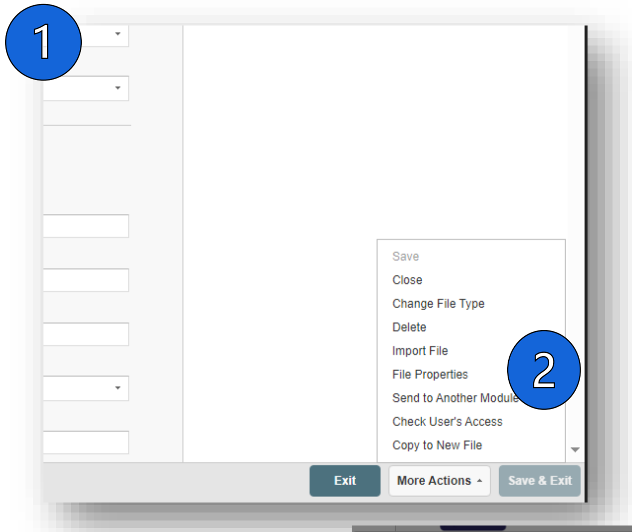


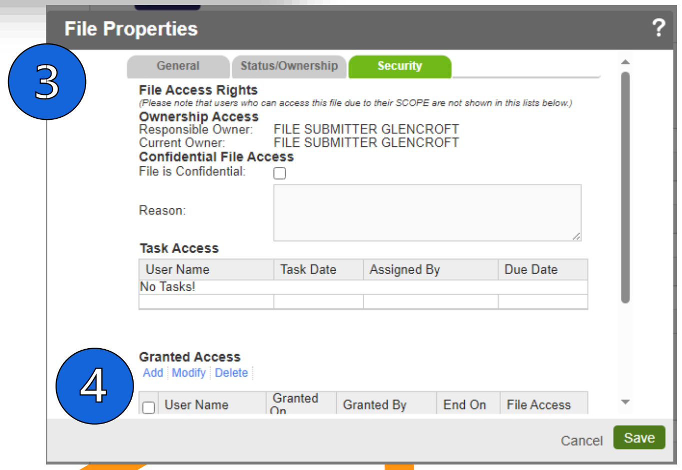
Granting Access to a File

There may be a case where you will need to grant access to file that is outside of a file manager's normal scope

Follow these steps

1. Open the file for which you would like to grant access
2. Go to the "More Actions" tab and select "File Properties"
3. The File Properties popup will display, click on the "Security" tab and scroll down to the "Granted Access" section
4. Click the small blue "Add" link located under the title "Granted Access"



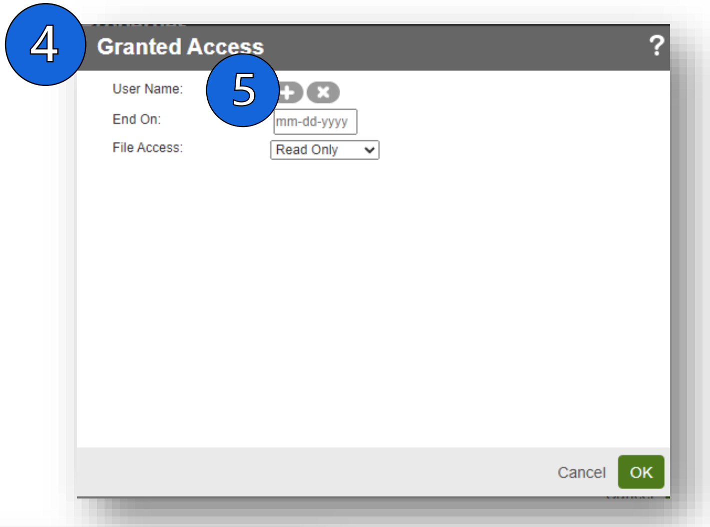


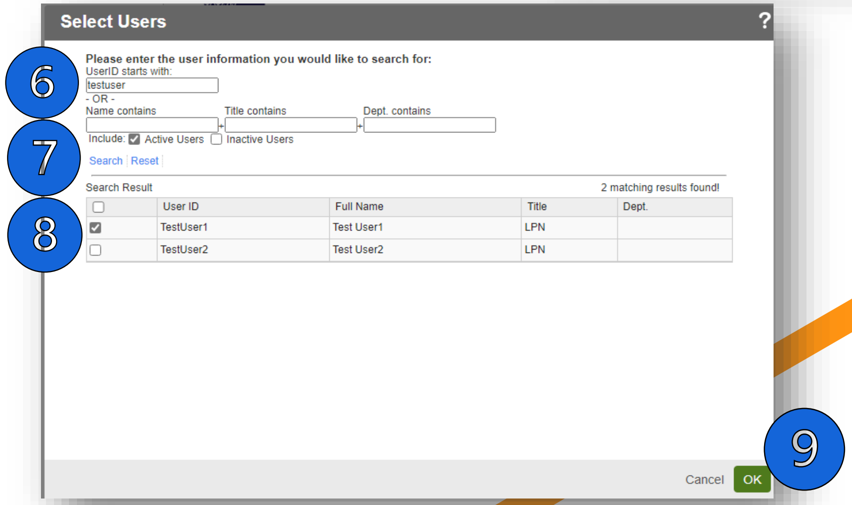
Granting Access to a File – part 2

There may be a case where you will need to grant access to file that is outside of a file manager's normal scope

Continue with the steps below

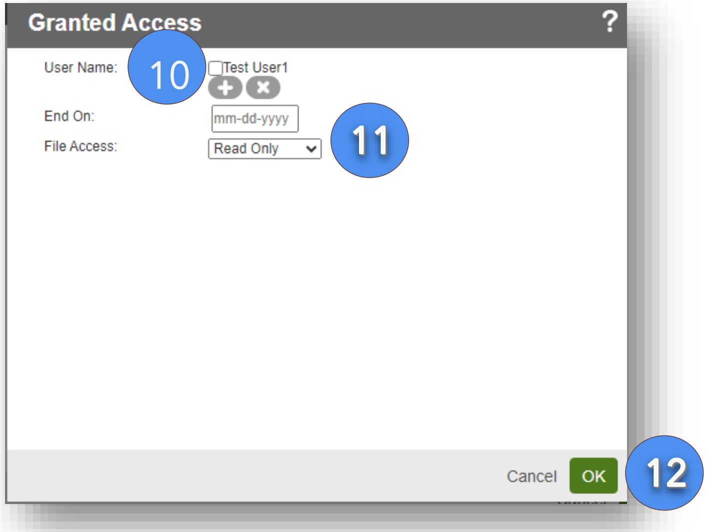
4. The "Granted Access" dialog box will appear
5. Click the "+" to open a dialog box to search for the file manager
6. Search for the file manager by typing in their name or user ID
7. Click "Search"
8. Check off the name of the File Manager
9. Click "OK"





Granting Access to a File – part 2

There may be a case where you will need to grant access to file that is outside of a file manager's normal scope



Continue with the steps below

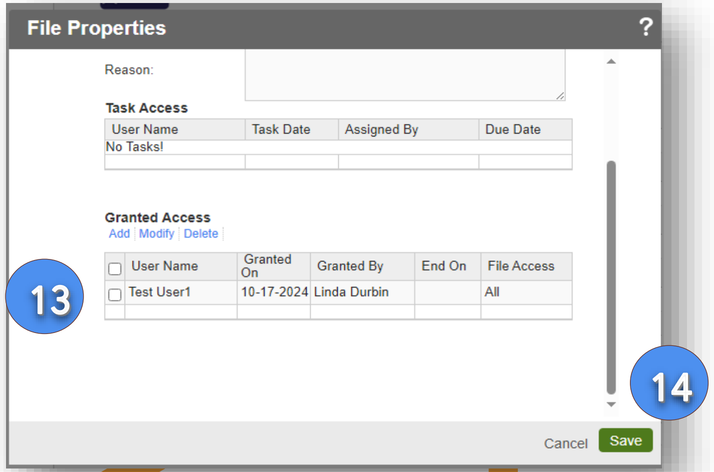
10. You will see your select file manager in the Granted Access dialog box

11. Select an end on date if needed and the level of file access you would like the file manager to have

12. Click "OK"

13. You will now see that the user has been added to "Granted Access" section in File Properties

14. Click "Save" - ***<u>very important</u>***



How do I report through CCSS?

Submitting to Caring Communities

Risk Manager roles in PEER can send events "over the bridge" to Caring Communities

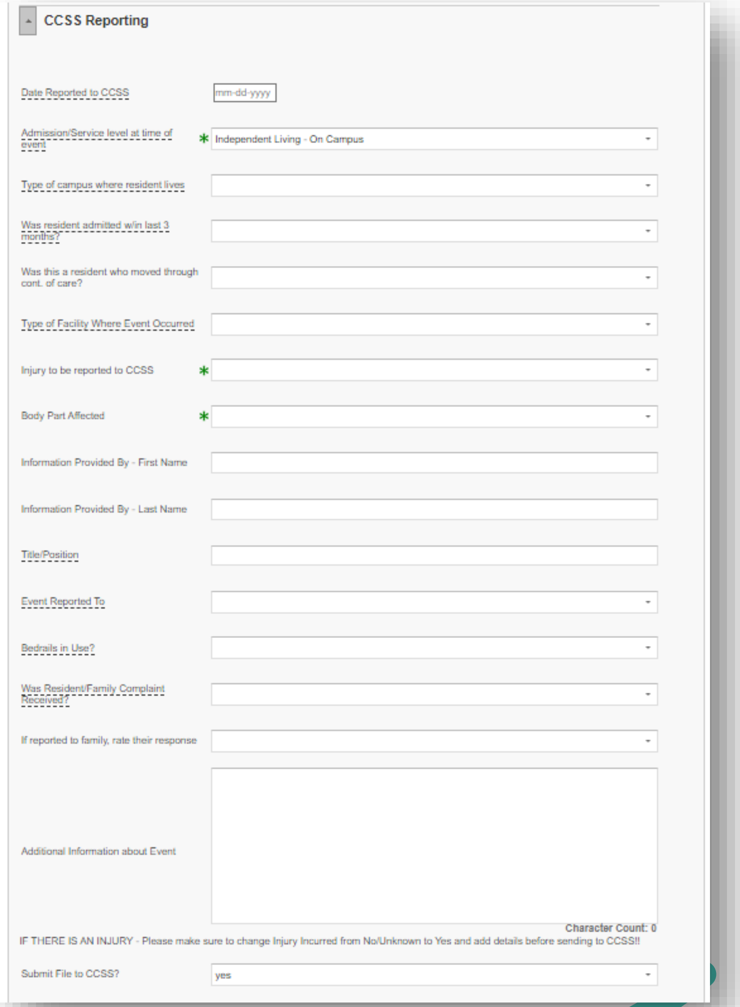
After an event is submitted, you will see a new section, called "CCSS Reporting"

Complete this section and select "yes" in the question titled "Submit File to CCSS"

Save and Exit the event form

Your file will now be sent over the bridge at the next system check

You will receive a confirmation from Caring Communities once they receive it



How do I request an alert?

Requesting and Alert

Send an email to durbin@fsainfo.org

Include the following:

- When would you like to alert to send
- File Manager(s) who should receive the alert
- How often you would like the system to check for the alert conditions

How do I set up a Personal View?

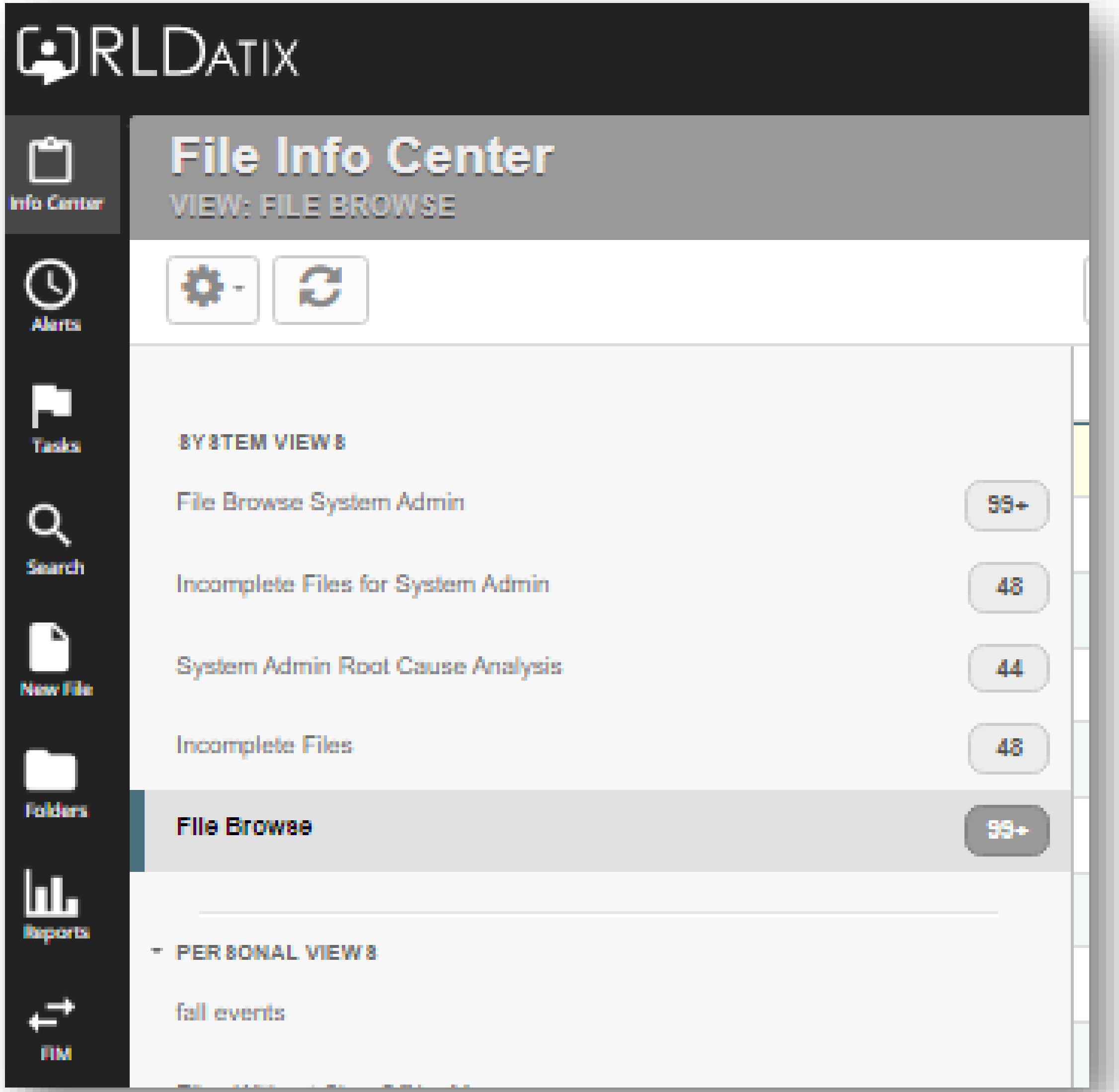
System Views vs. Personal Views

System Views and Personal Views are found in the Info Center

System Views are already set and cannot be changed.

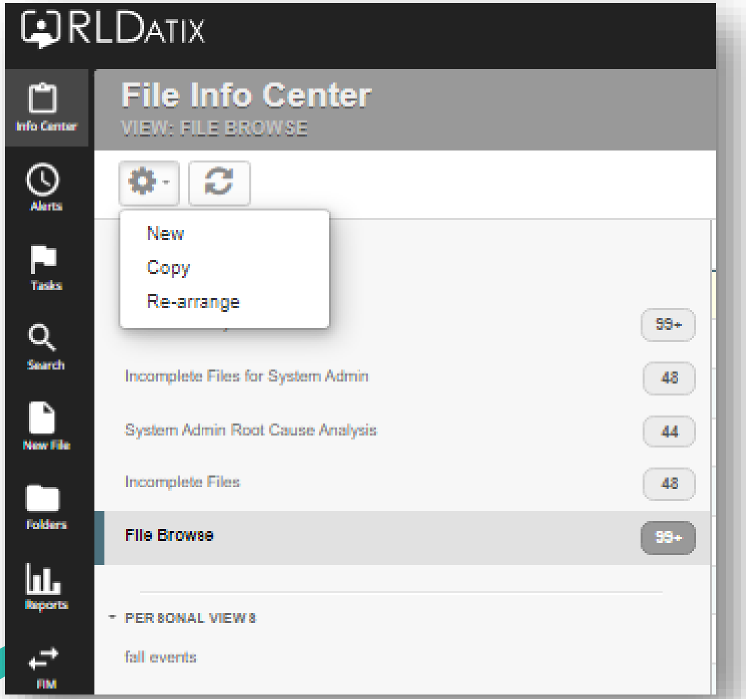
Personal Views are views that you can create specific to the files you would like to see

Personal Views are only on *your* account and can be created, edited, and deleted by you

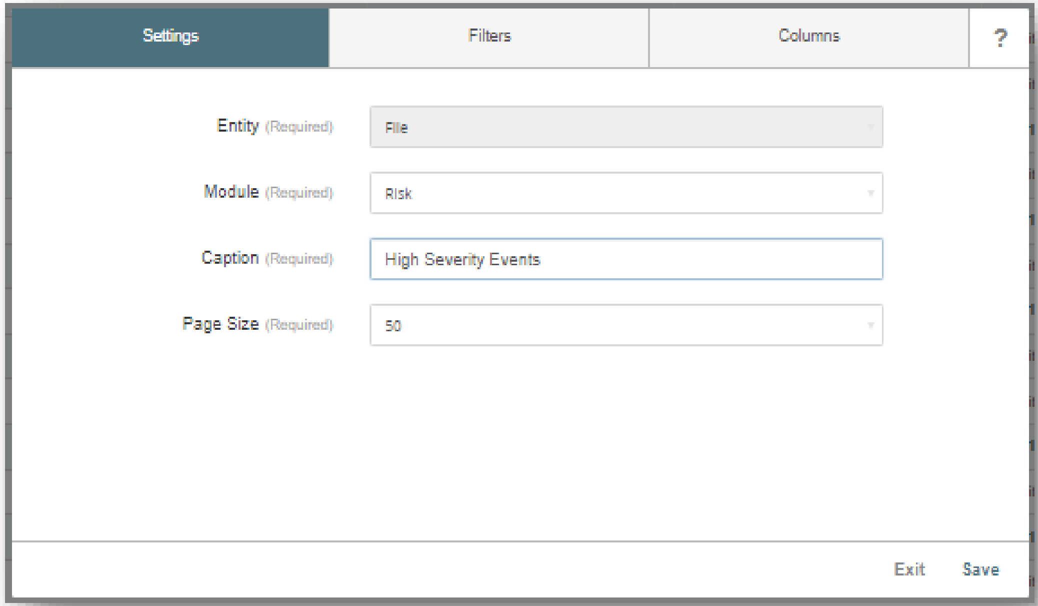


Creating a Personal View

Step 1: From the settings icon in the upper left, select "New"

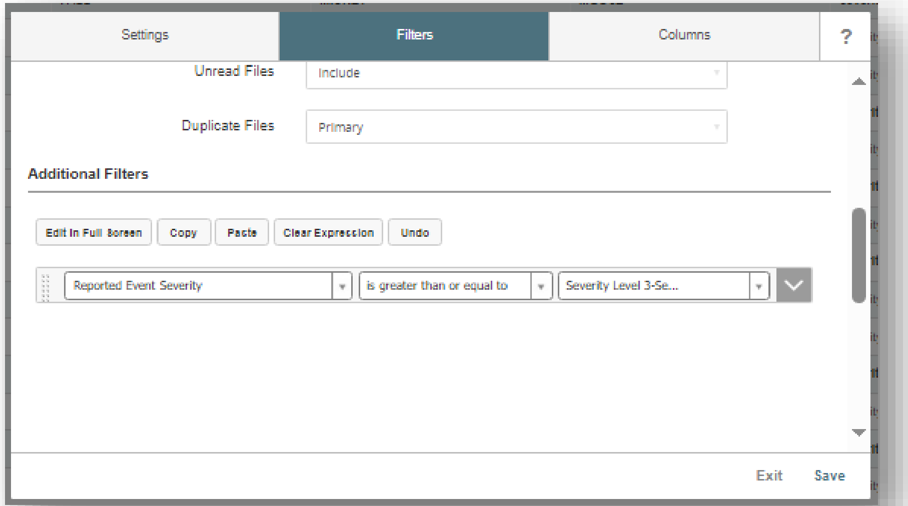


Step 2: In the popup box, make your selections and name your custom view

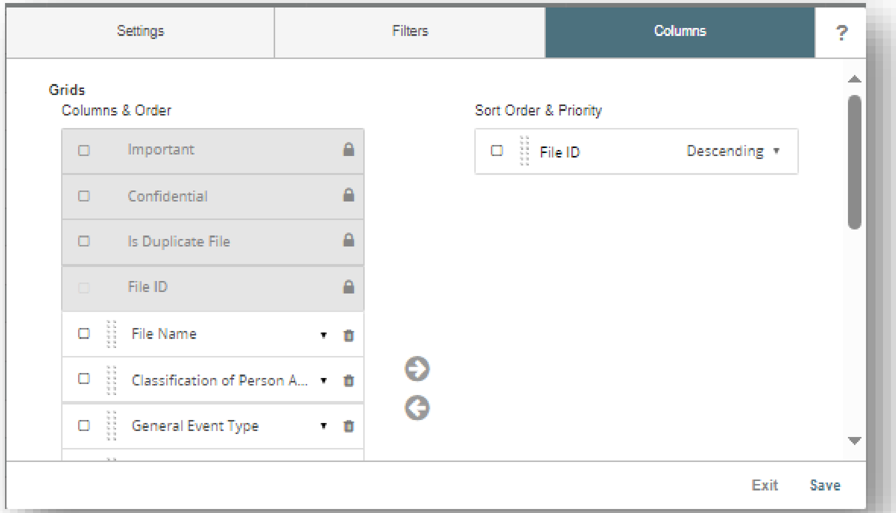


Creating a Personal View – Part 2

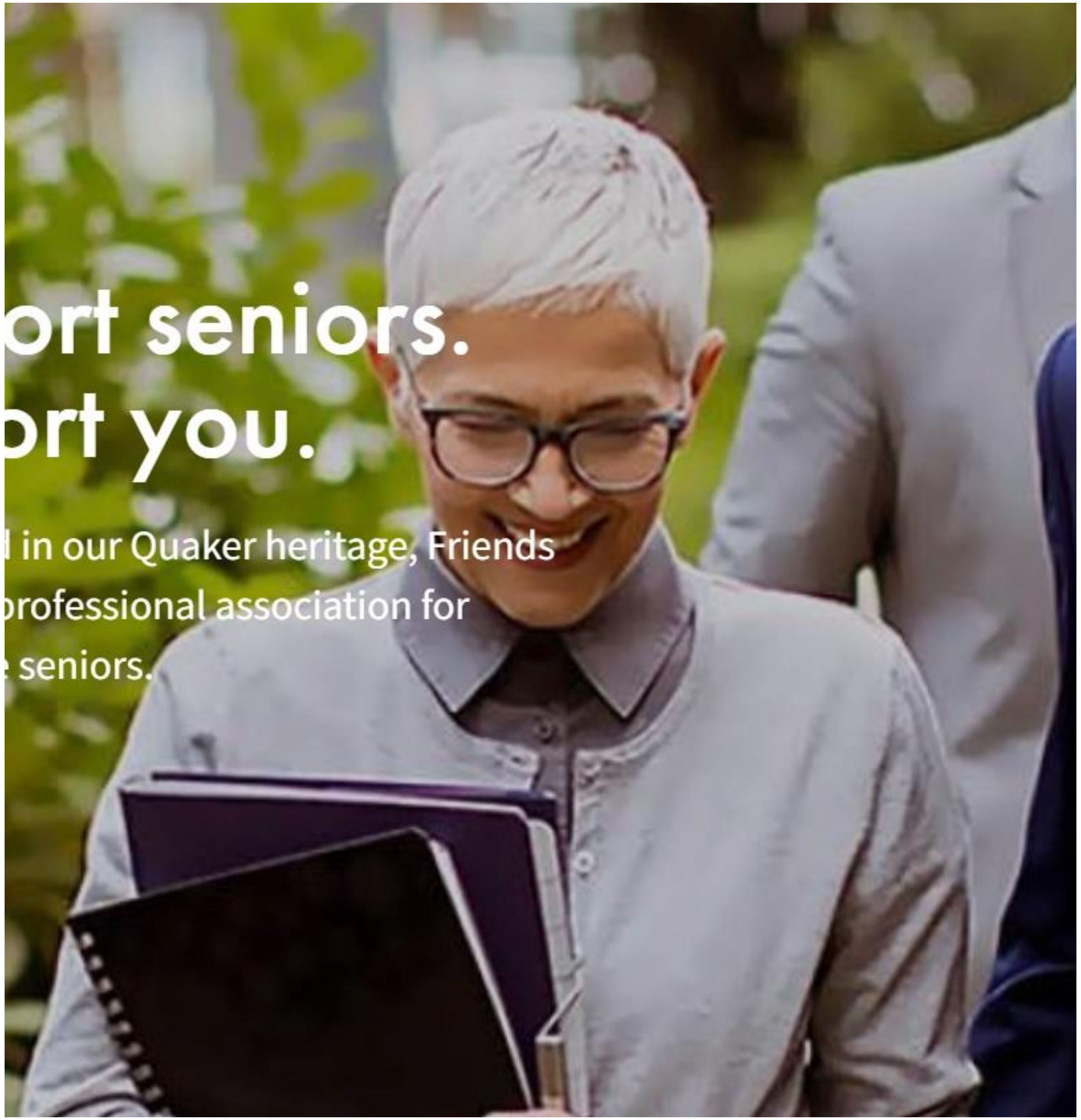
Step 3: Click to open the filters tab, you will need to enter what conditions you would like to see in your view



Step 4: Click to open the columns tab. You can add columns and delete column from the view



How do I access resources on the FSA website?

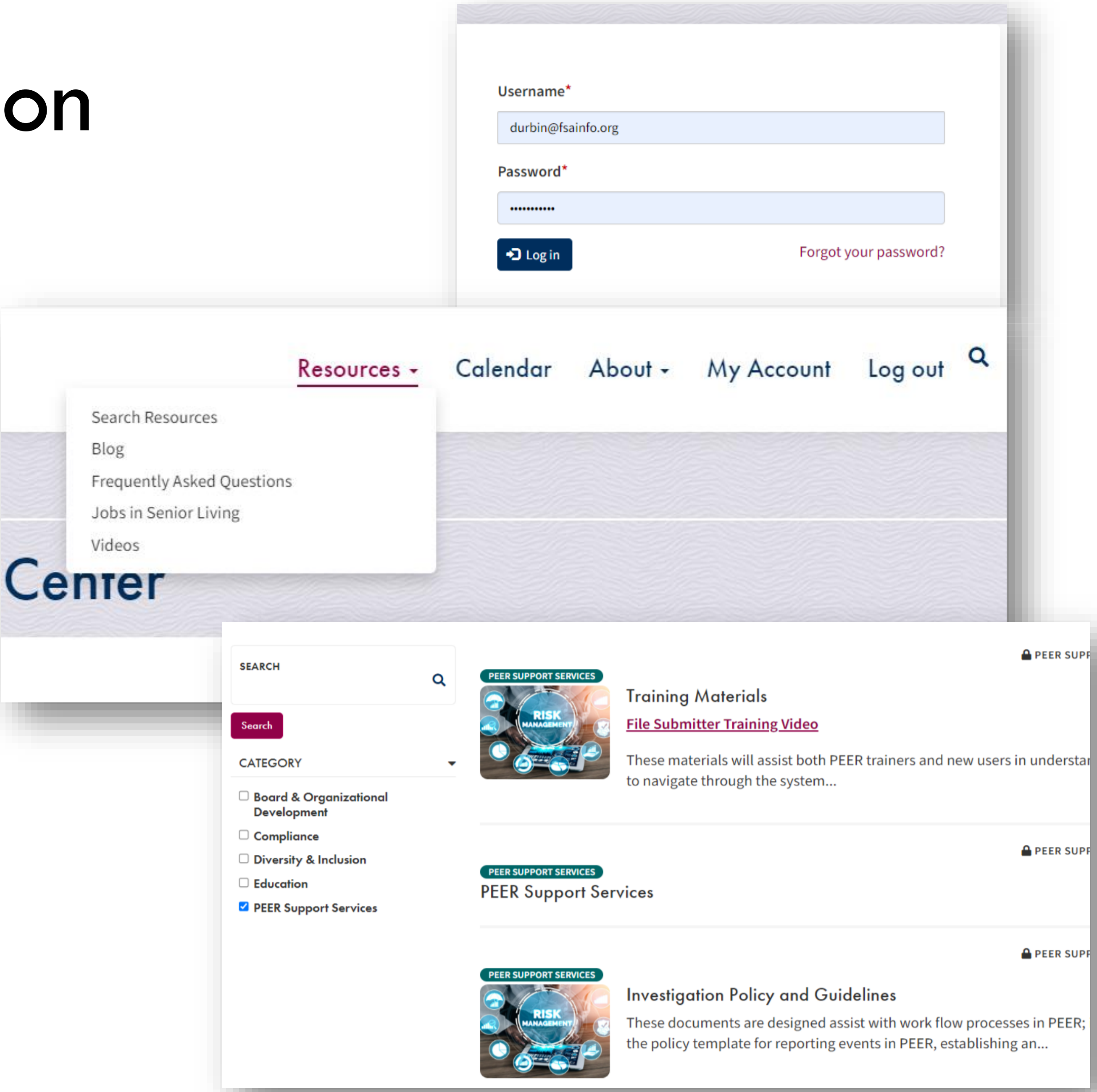


More PEER Information

Navigate to https://www.fsainfo.org/ and login

From the dropdown on the top, select "Search Resources" from the "Resources" menu

Check off "PEER Support Services" to see all the information regarding PEER



Thank you

Linda Durbin

215-646-0720 ext. 21

durbin@fsainfo.org

www.fsainfo.org