

# PEER Risk Manager Training





# Agenda

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Requesting **a New Account**

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User Roles

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User Scopes

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Icon Walls

---

Updating Locations Lists

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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**

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Do you like this user to have the same PEER setup as another user?

☐ Yes, please list:

Does the employee listed above need to be made inactive?

☐ Yes

Does new employee get same alerts and reports as employee being copied?

☐ Yes

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If you answered "yes" to question 1, you can STOP here

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Employee role (if applicable)

Employee Wall

Employee Wall

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Employee role: no Closure, no Reports

Employee role: no Closure and with Reports

Employee role: with Closure and Reports

---

Employee role: I'd 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


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

Risk Manager




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

File Manger, closure, reports



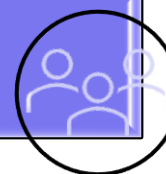
- Can submit files
- Can view files submitted by others
- Can add follow-up
- Can run reports
- Cannot close files

File Manager, no closure, reports



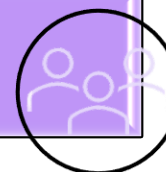
- Can submit files
- Can view files submitted by others
- Can add follow-up
- Cannot use reports
- Cannot Close files

File Manger, no closure, no reports



- Can submit files only

File Submitter



What is a User Scope?



# Scopes In PEER

Scopes are what a user will see in PEER

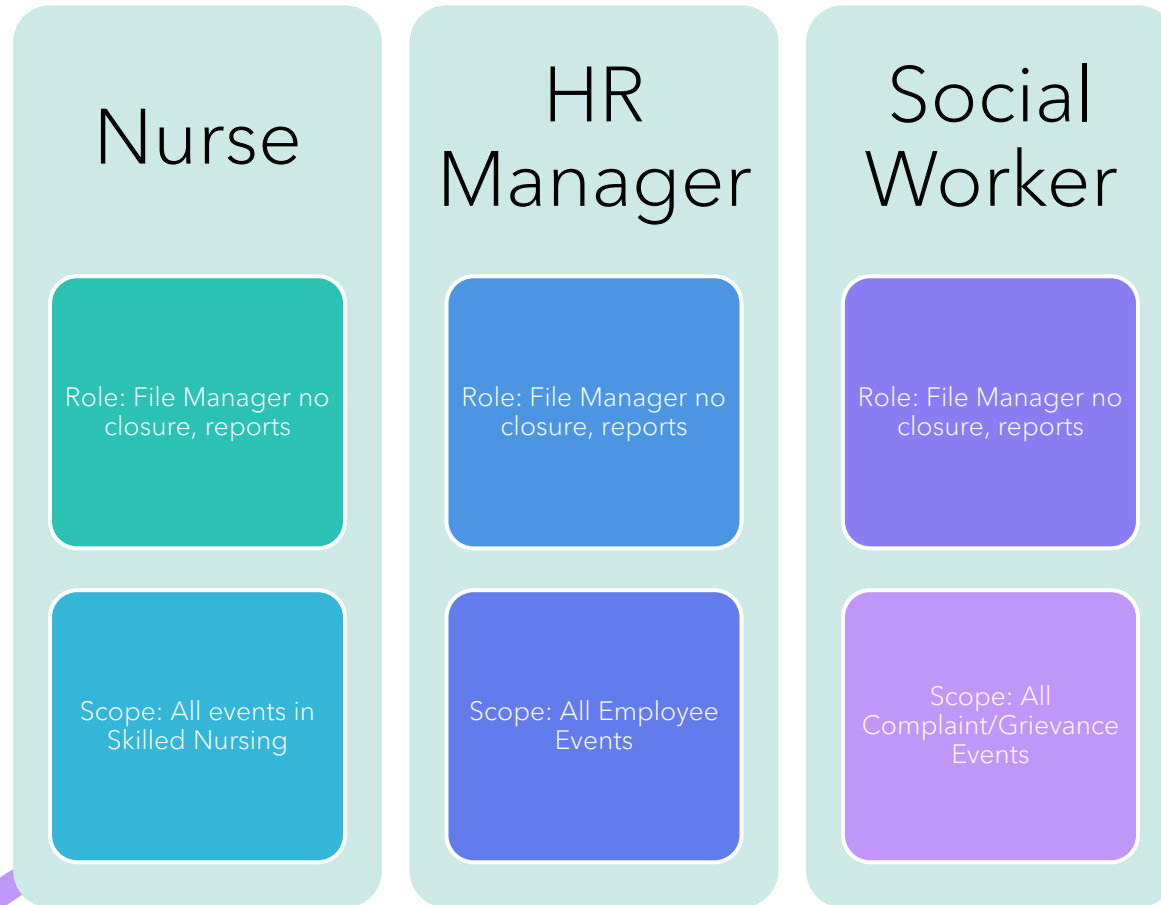
Scopes can be used to manage workflow by only showing a file manager the files they need to concentrate on

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





# How Roles and Scopes work together



Each user in PEER has a role and a scope

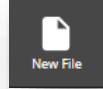
In the example to the left, you can see that the nurse, HR manager, and the social worker all have the same role. This allows them all to manage files and pull reports. They have different scopes, which means the files they see in PEER will be different.

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?

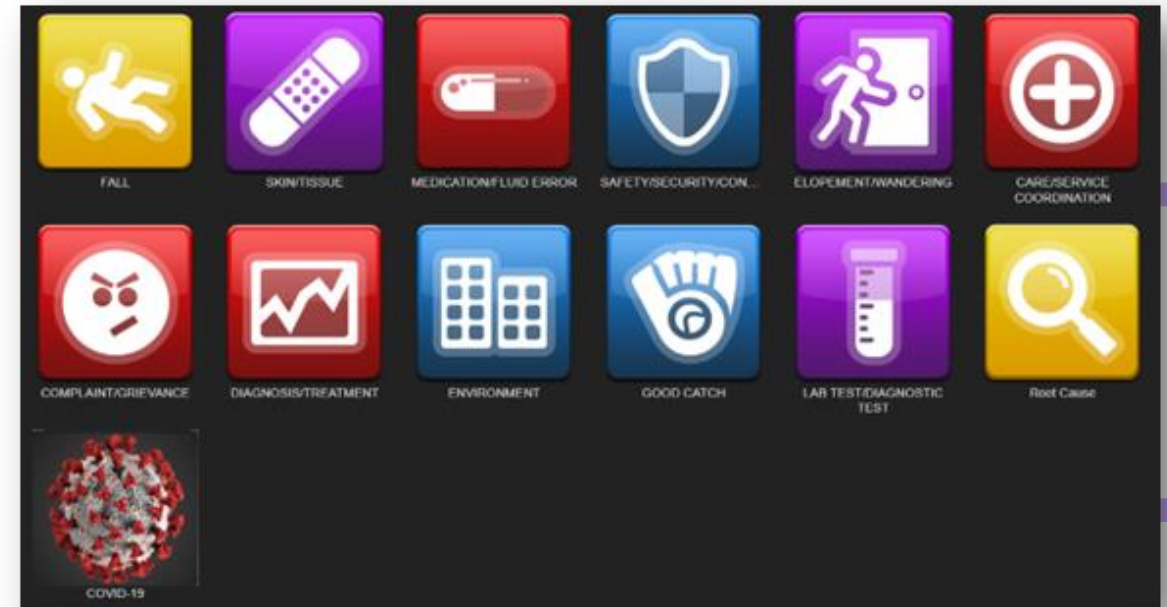
Fall	Skin Tissue	Medication/Fluid Error	Safety/Security/Conduct	Elopement/Wandering
Care/Service Coordination	Complaint/Grievance	Diagnosis/Treatment	Environment	Good Catch
Lab Test/Diagnostic Test	Root Cause	Covid-19	<b>Deficiency</b> by DOH or Above	Reportable Request for Medical Records
Infection	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

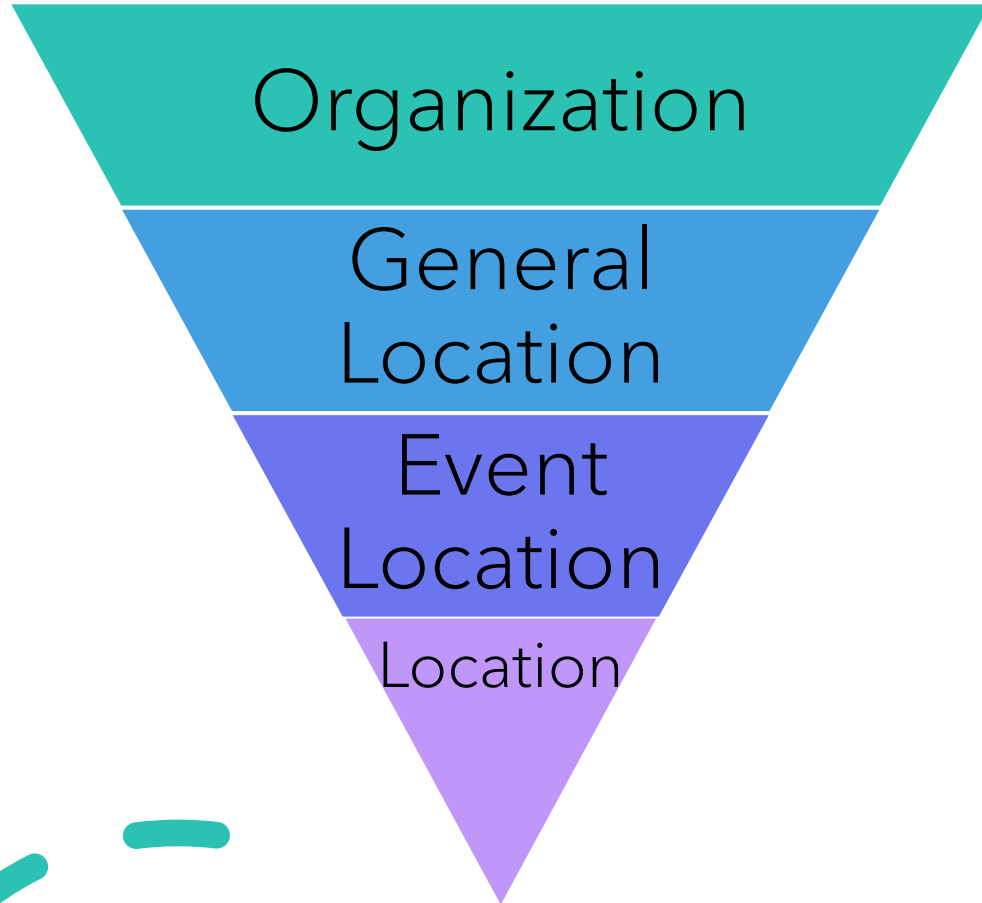




How do I update my  
locations?



# 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

The screenshot displays the 'FALL Event Management Form - 369959'. At the top, a blue button labeled 'Add Follow-up' has a dropdown menu open, showing three options: 'Work done on file', 'Review', and 'Sign-Off'. Below this, the form is organized into sections: 'Person Information', 'Event Details', 'Fall Specific Event Details', 'Injury Details', and 'File Notifications'. The 'File Notifications' section includes a 'Linked Files (0)' link. On the right side, there is a logo for 'FSA FRIENDS SERVICES ALLIANCE' and a section titled 'General Event Type' with a sub-section 'Classification of Person Affected'.

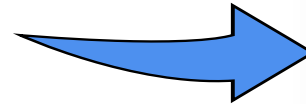
# Steps to Add Follow-up

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



**1**

**FALL Event Manager**

**Add Follow-up**

- Work done on file
- Review
- Sign-Off

Person Information

**2**

**New Work done on file Follow-up**

Fields labeled with an asterisk(\*) are required.

General

Type: Work done on file

Sub-Type: \* Meeting- Family/Power of Attorney

Date: \* 10-16-2024

Followup By: \* Linda Durbin

Followup To/With:

Item Purchased:

Detail

Form Letters: Please Select

Populate Email Print Download

Cancel Add

**Followup List**

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

Follow-ups

Edit Delete

<input type="checkbox"/>	Type	Sub-Type	Followup By	Followup To/With	Date	Description
<input type="checkbox"/>	Work done on file	Other	Jennifer Sheckells		10-10-2024	Updated severity...
<input type="checkbox"/>	Sign-Off	Sign off by Director of...	Jennifer Sheckells		10-10-2024	
<input type="checkbox"/>	Work done on file	Care/Support/Service...	Jennifer Sheckells		10-10-2024	Updated to reflec...
<input type="checkbox"/>	Review	Reviewed	Jennifer Sheckells		10-10-2024	Awating further f...
<input type="checkbox"/>	Work done on file	Other	Jennifer Sheckells		10-10-2024	Updated injury d...
<input type="checkbox"/>	Review	Reviewed	Jennifer Sheckells		10-10-2024	
<input type="checkbox"/>	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 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

FALL Event Management Form - 369959

Add Follow-up -

Table of Contents

- General Event Type
- Person Information
- Event Details
- Fall Specific Event Details
- Injury Details

File Notifications

- Linked Files (0)
- Duplicate Files (0)
- Related Files
- Alerts (0)
- Tasks (0)
- Summaries
- Audits
- File Exports

General Event Type

Classification of Person Affected: \* RESIDENT/CLIENT/MEMBER

Current Level of Care: \* Skilled Nursing/Healthcare

Was There An Injury?: \* yes

Equipment Involved/Malfunction: \* no

Person Information

Last Name: \* ANNA First Name: \* PRINCESS

Date of Birth (mm-dd-yyyy): mm-dd-yyyy Age:

Sex: \* F Street:

City: State: Phone:

Choose File Status

File State: Closed

Select Status: Resolved

Note: Associated duplicate files will also be closed

Cancel OK

Save

Close

Change File Type

Delete

Import File

File Properties

Send to Another Module

Check User's Access

Copy to New File

Exit More Actions Save & Exit



# 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

The screenshot displays the 'File Info Center' interface with the 'VIEW: FILE BROWSE' selected. On the left, there are 'SYSTEM VIEWS' including 'File Browse System Admin' (99+), 'Incomplete Files for System Admin' (48), 'System Admin Root Cause Analysis' (44), and 'Incomplete Files' (48). The main table lists files with columns for checkboxes, File ID, Event Date (mm-dd-yyyy), General Event Type, and other details. Three files are selected (checked): 369959, 369966, and 369960. A 'More' dropdown menu is open for the selected files, showing options: 'Change Owner', 'Change State', 'Close', and 'Delete'. The 'Close' option is highlighted. A 'Close File(s)' dialog box is shown in the foreground, with 'Status' set to 'Resolved' and a note: 'Note: Associated duplicate files will also be closed.' The dialog has 'Cancel' and 'OK' buttons. Below this, another 'Close File(s)' dialog box shows 'BATCH PROCESS COMPLETE' with a green progress indicator at 100% and the text: '3 items processed successfully. 0 items failed to process.' A 'Done' button is at the bottom right of this dialog.

	File ID	Event Date (mm-dd-yyyy)	General Event Type
<input checked="" type="checkbox"/>	369959	10-09-2024	FALL
<input checked="" type="checkbox"/>	369966	10-09-2024	FALL
<input checked="" type="checkbox"/>	369960	10-08-2024	SKIN/TISSUE
<input type="checkbox"/>	369958	09-30-2024	FALL
<input type="checkbox"/>	369955	09-17-2024	FALL

# 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"

The screenshot illustrates the process of reopening a closed file through a web application. It is divided into four numbered steps:

- Step 1:** The user is on the "Search Page". The search criteria are set to "Files" within the "Risk" module. The "Search" button is visible.
- Step 2:** A table of search results is displayed. The first row, "SKIN/TISS (369960)", is selected with a checkbox. The "More" dropdown menu is open, showing various actions.
- Step 3:** The "More" dropdown menu is expanded, showing options like "View Summary", "Print Summary", "Email Summary", "Download Summary", "Important", "Not Important", "Confidential", "Public", "Add To Folder", "Change Owner", "Change State", "File Properties", and "Close". The "Change State" option is highlighted.
- Step 4:** A "Change State" dialog box is open. It shows the "File State" set to "In-Progress" and the "Select Status" set to "Active". The "OK" button is visible.

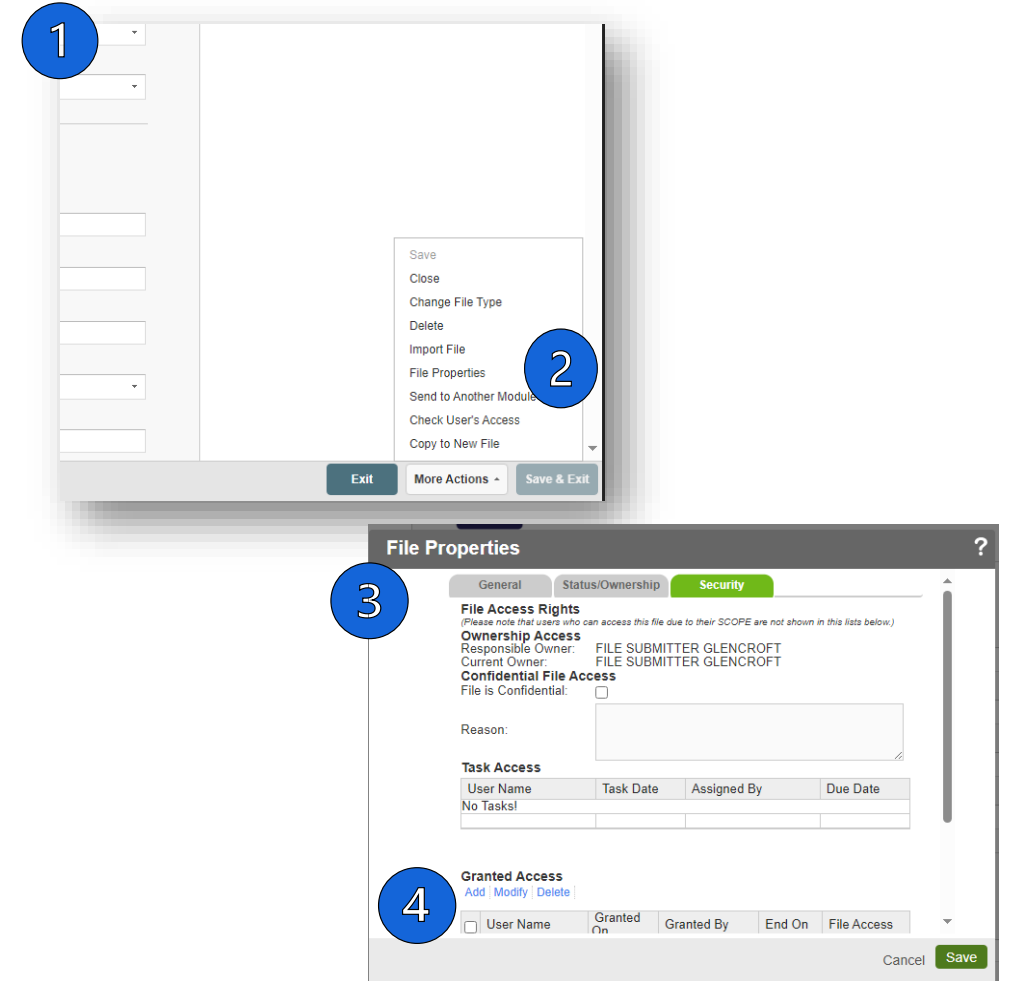
	File Name	Location of Person	General Event Type	Last Name	First Name	Event Date (mm-dd-yyyy)	Report
<input checked="" type="checkbox"/>	SKIN/TISS (369960)	/CLIENT/MEMBER	SKIN/TISSUE	DUCK	DAISY	10-08-2024	Sever Mino
<input type="checkbox"/>	FALL Even (369966)	/CLIENT/MEMBER	FALL	TEST	TEST	10-09-2024	Sever Injur
<input type="checkbox"/>	FALL Event (369959)	/CLIENT/MEMBER	FALL	ANNA	PRINCESS	10-09-2024	Sever Injur

# 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"

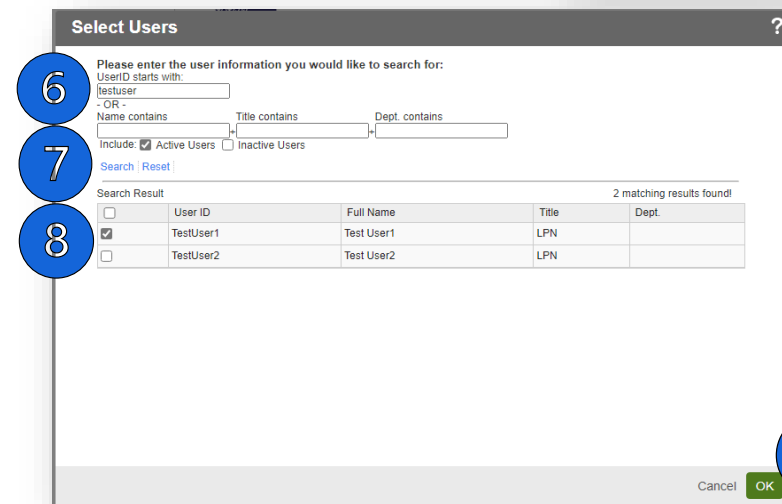
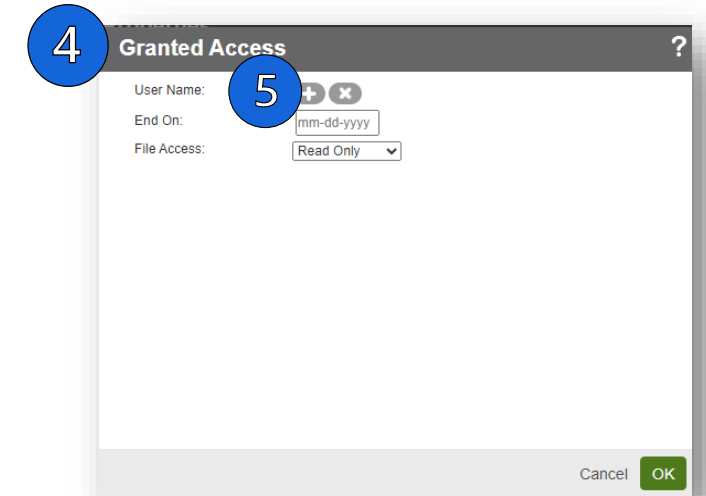


# Granting Access to a File – part 2

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" - very important

**Granted Access** ?

User Name:  10

End On:  11

File Access:

Cancel OK 12

**File Properties** ?

Reason:

**Task Access**

User Name	Task Date	Assigned By	Due Date
No Tasks!			

**Granted Access**  
[Add](#) [Modify](#) [Delete](#)

<input type="checkbox"/>	User Name	Granted On	Granted By	End On	File Access
<input type="checkbox"/>	Test User1	10-17-2024	Linda Durbin		All

 13

Cancel Save 14

How do I report  
through CCSS?



# Submitting to Caring Communities

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

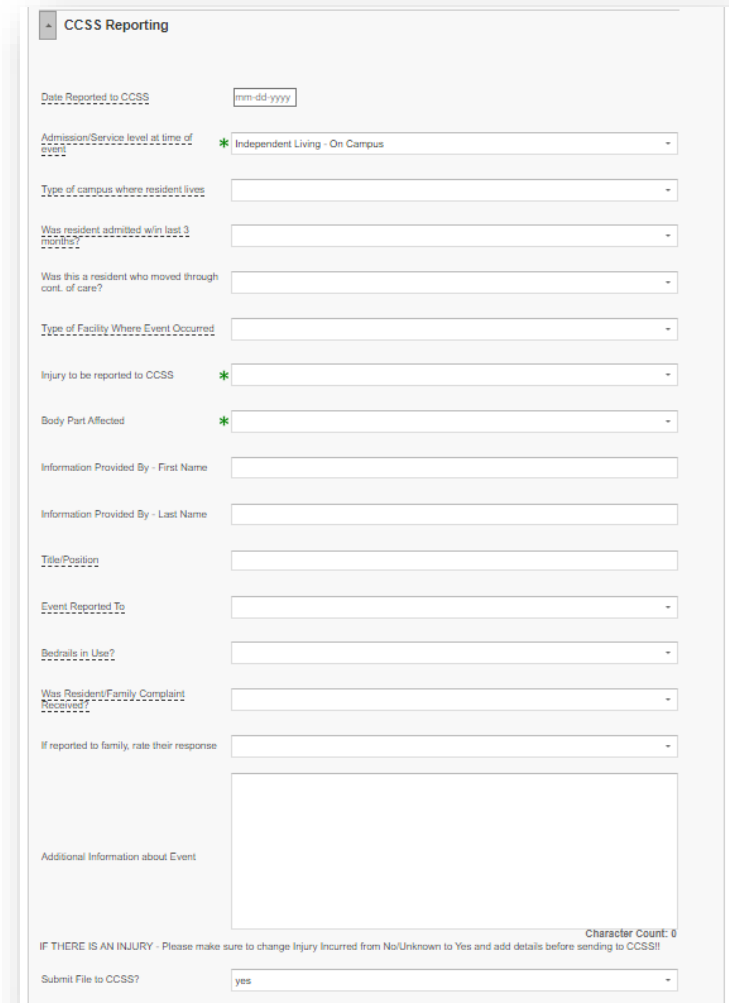
After an event is submitted, you will see a new section, called "CCSS Reporting"

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

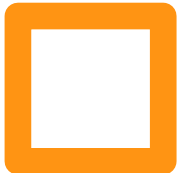
Save and Exit the event form

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



The screenshot shows a web form titled "CCSS Reporting". It contains several fields and dropdown menus for reporting an event. The fields include: "Date Reported to CCSS" (mm-dd-yyyy), "Admission/Service level at time of event" (dropdown with "Independent Living - On Campus" selected), "Type of campus where resident lives" (dropdown), "Was resident admitted w/in last 3 months?" (dropdown), "Was this a resident who moved through cont. of care?" (dropdown), "Type of Facility Where Event Occurred" (dropdown), "Injury to be reported to CCSS" (dropdown with a green asterisk), "Body Part Affected" (dropdown with a green asterisk), "Information Provided By - First Name" (text input), "Information Provided By - Last Name" (text input), "Title/Position" (text input), "Event Reported To" (dropdown), "Bedrails in Use?" (dropdown), "Was Resident/Family Complaint Notified?" (dropdown), "If reported to family, rate their response" (dropdown), and "Additional Information about Event" (text area). At the bottom, there is a "Submit File to CCSS?" dropdown with "yes" selected. A "Character Count: 0" indicator is visible next to the text area.





How do I request an alert?





# Requesting and Alert



Send an email to [durbin@fsainfo.org](mailto: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?



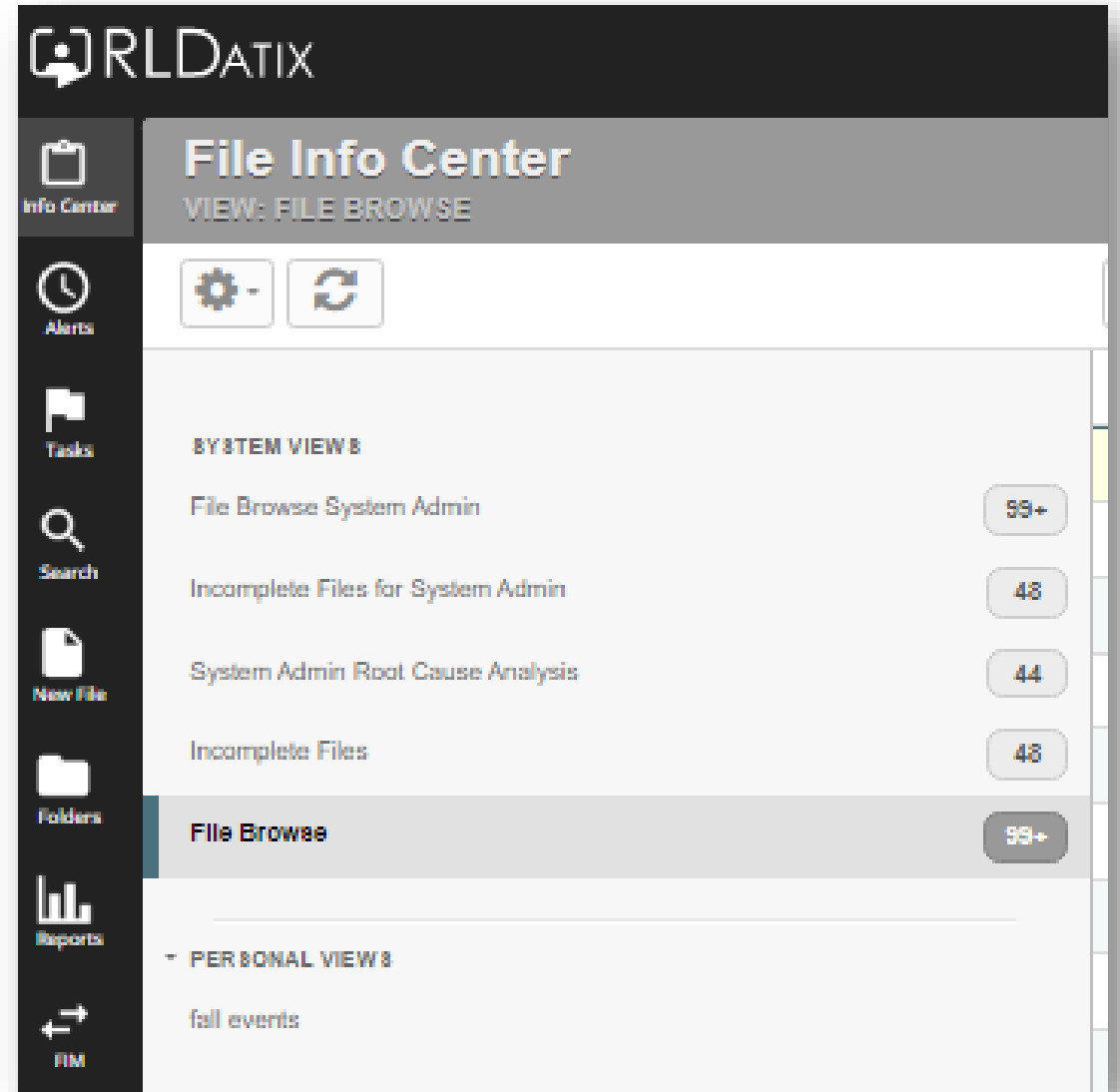
# System Views vs. Personal Views

System Views and Personal Views are found in the Info Center

System Views are already set and cannot be changed.

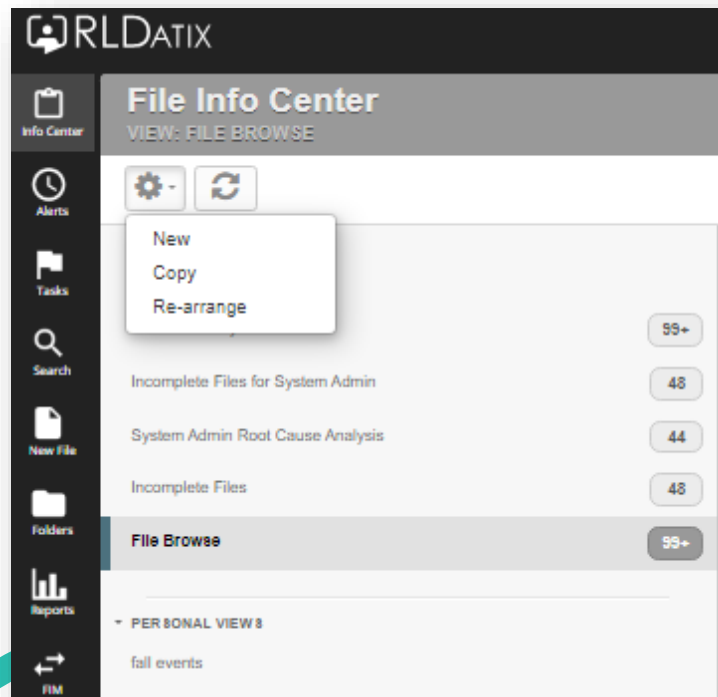
Personal Views are views that you can create specific to the files you would like to see

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

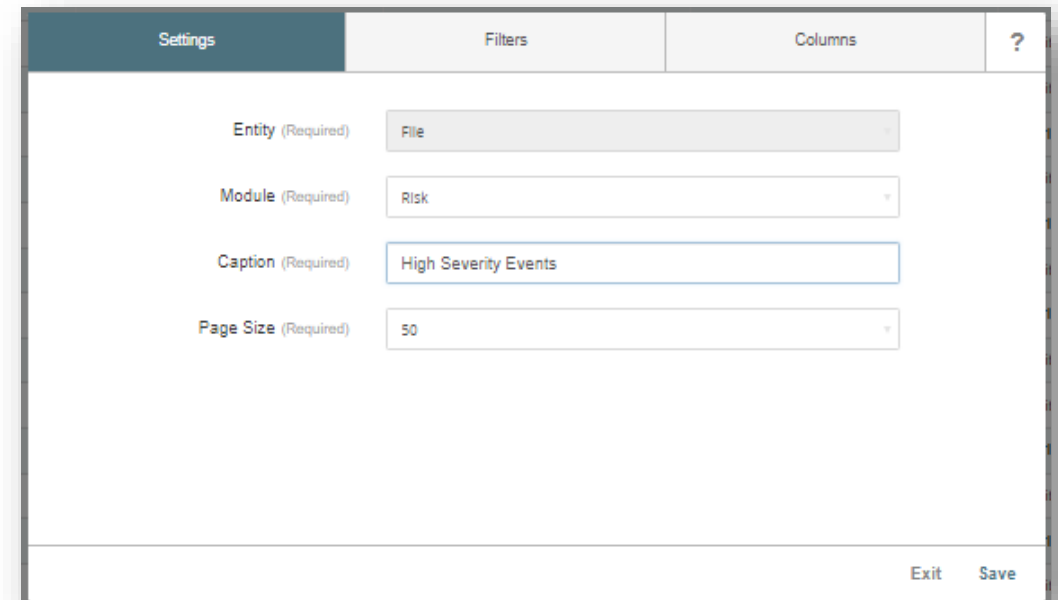


# Creating a Personal View

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

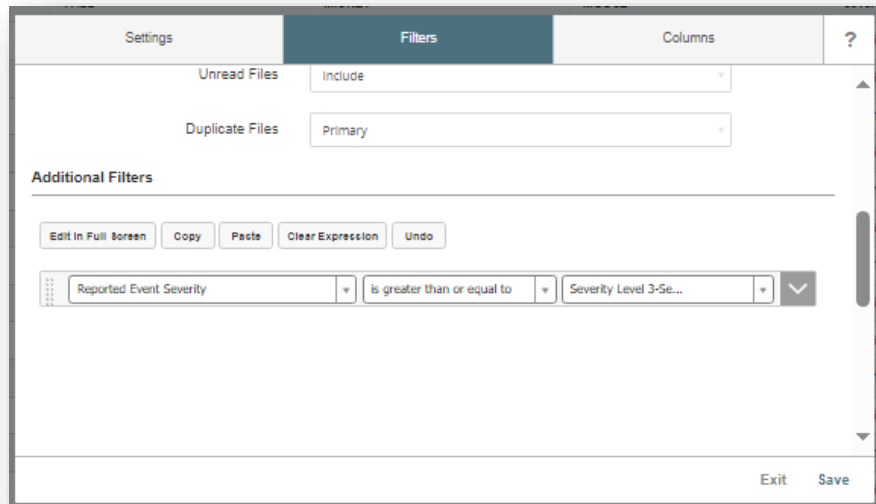


Step 2: In the popup box, make your selections and name your custom view



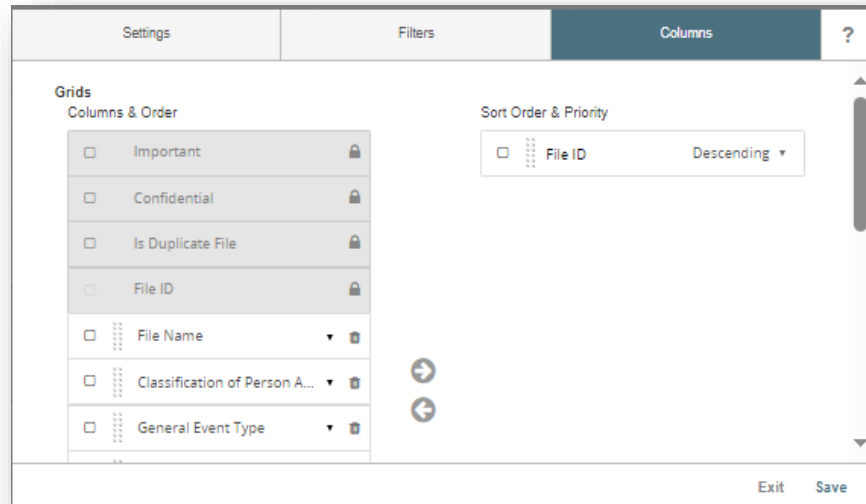
# Creating a Personal View – Part 2

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



The screenshot shows the 'Filters' tab of a software interface. At the top, there are three tabs: 'Settings', 'Filters' (which is active and highlighted in dark blue), and 'Columns', followed by a help icon (?). Below the tabs, there are two filter conditions: 'Unread Files' with a dropdown menu set to 'Include', and 'Duplicate Files' with a dropdown menu set to 'Primary'. Below these is a section titled 'Additional Filters' containing buttons for 'Edit in Full Screen', 'Copy', 'Paste', 'Clear Expression', and 'Undo'. At the bottom of this section, there is a filter expression: 'Reported Event Severity' followed by 'is greater than or equal to' and 'Severity Level 3-Se...'. At the very bottom of the window, there are 'Exit' and 'Save' buttons.

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

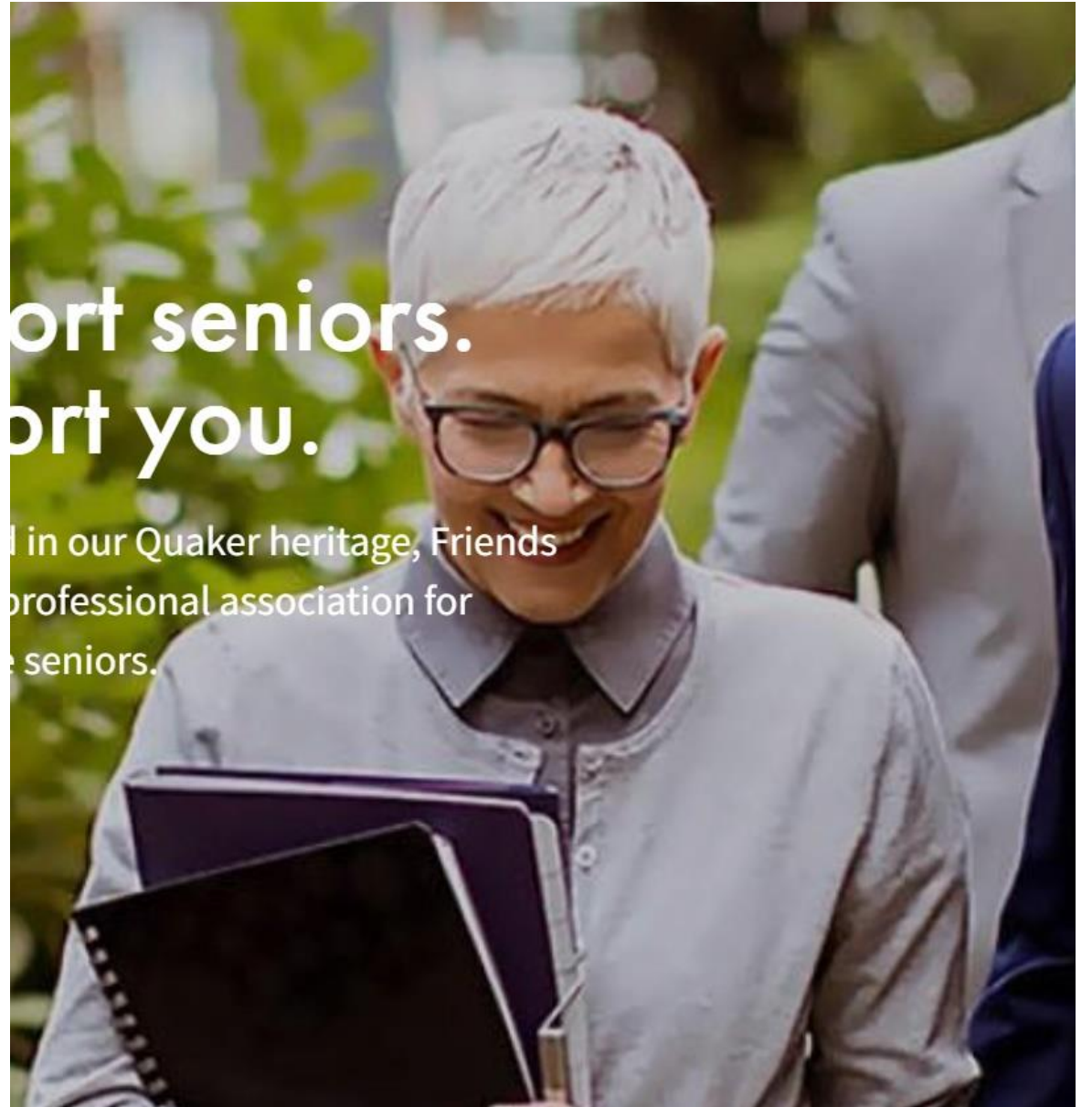


The screenshot shows the 'Columns' tab of the same software interface. The tabs at the top are 'Settings', 'Filters', and 'Columns' (which is active and highlighted in dark blue), followed by a help icon (?). The main area is divided into two sections: 'Columns & Order' on the left and 'Sort Order & Priority' on the right. The 'Columns & Order' section contains a list of columns with checkboxes and lock icons: 'Important', 'Confidential', 'Is Duplicate File', 'File ID', 'File Name', 'Classification of Person A...', and 'General Event Type'. The 'Sort Order & Priority' section shows a dropdown menu with 'File ID' selected and 'Descending' as the sort order. At the bottom of the window, there are 'Exit' and 'Save' buttons.

How do I access  
resources on the  
FSA website?

Support seniors.  
Support you.

In our Quaker heritage, Friends  
is a professional association for  
seniors.

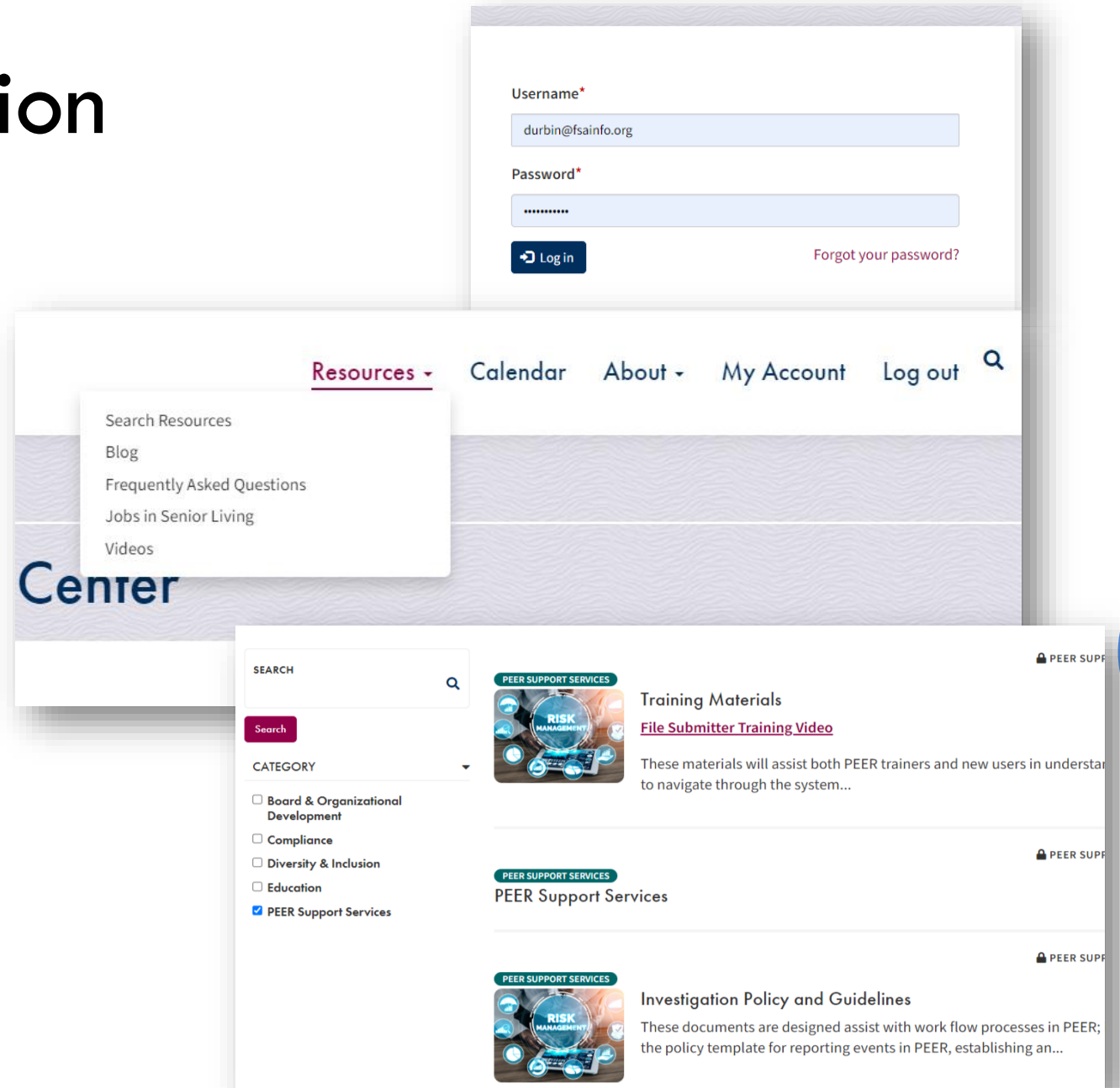


# More PEER Information

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

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