

PEER Incident File Management

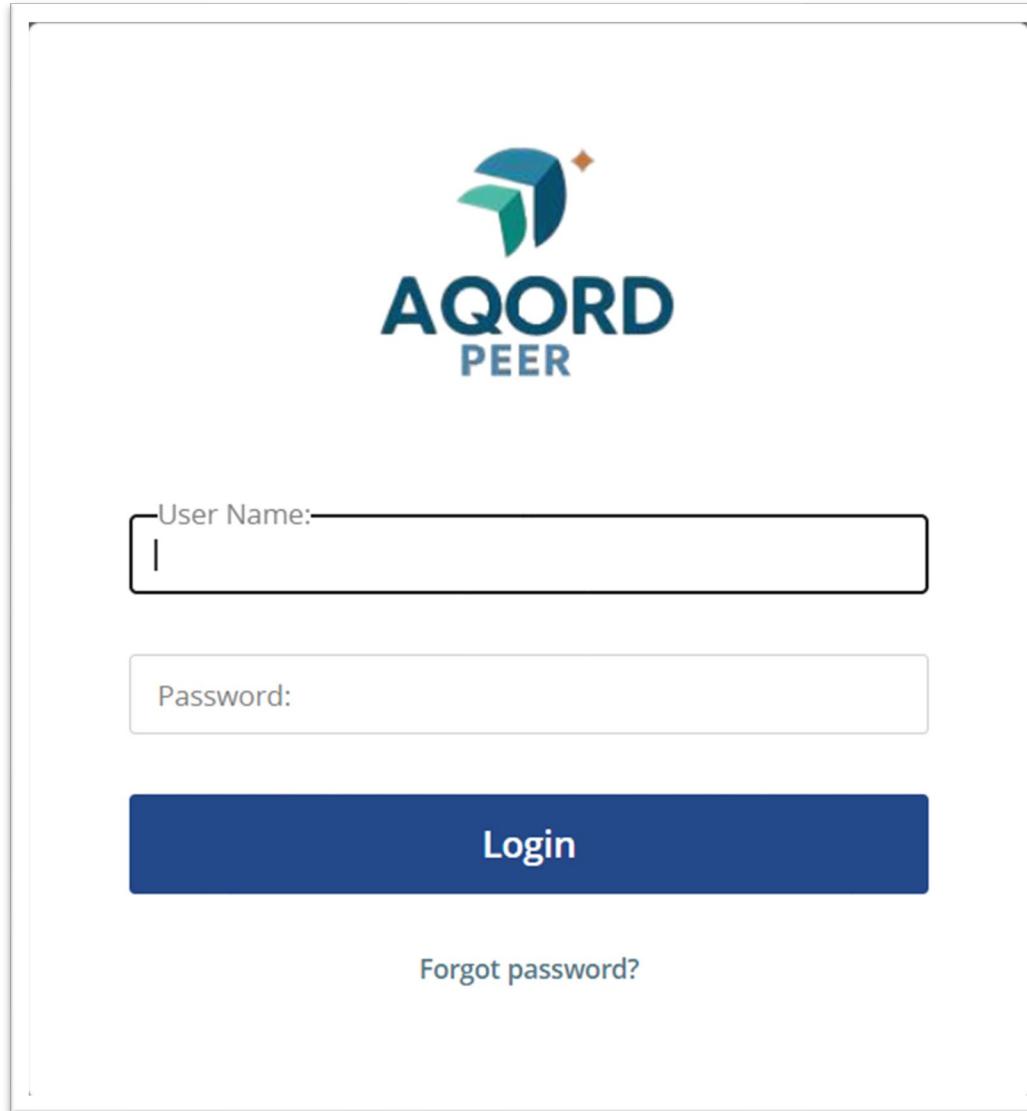
Workflow and Follow-up



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





Logging in 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

The screenshot shows the RLDATIX File Info Center. The left sidebar has icons for Info Center, Alerts, Tasks, Search, New File, Folders, Reports, and File Tracker. The main area has a title 'File Info Center' and a 'VIEW: FILE BROWSE'. It includes a search bar and filter buttons for settings and refresh. The 'File Browse' view is selected, showing 8 items. The table columns are: File ID, Event Date (mm-dd-yy), General Event Type, First Name, and Last Name. The data is as follows:

	File ID	Event Date (mm-dd-yy)	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

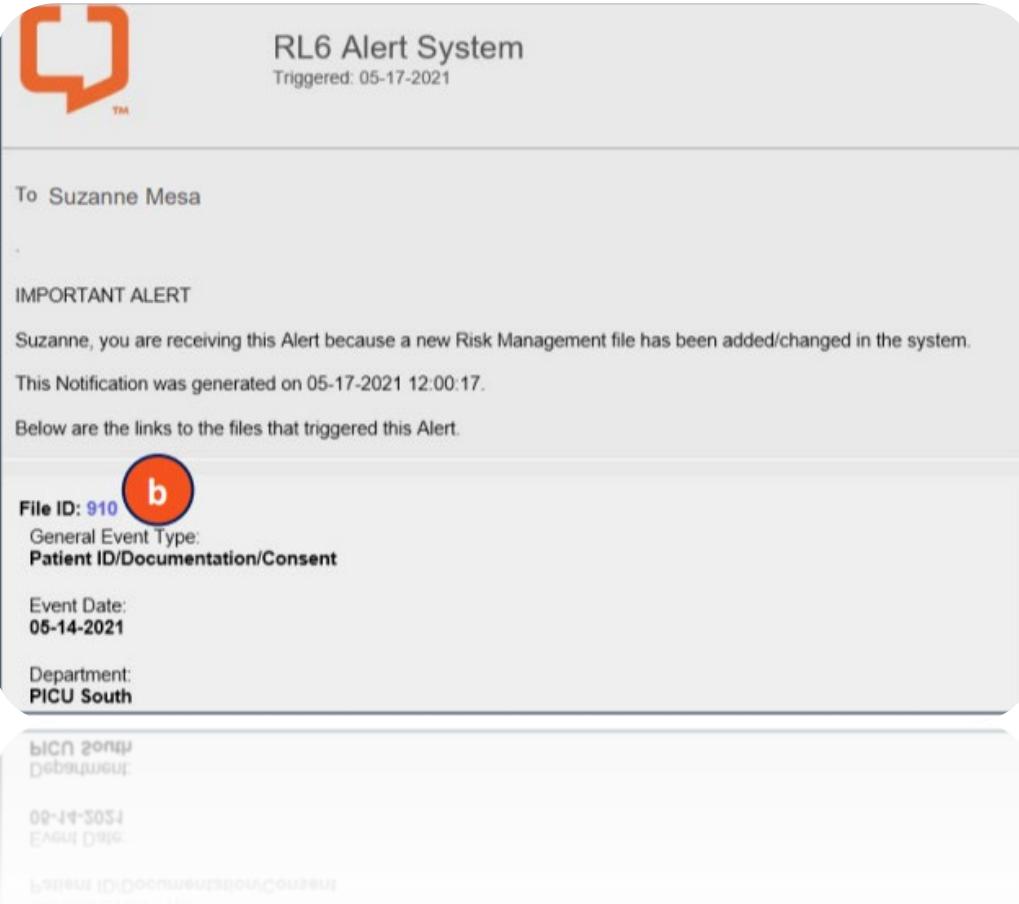
These are preset views that PEER provides. Within File Browse you will see all the files you have scope to see

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



The screenshot shows an email from the RL6 Alert System. The subject line is "RL6 Alert System" and the triggered date is "Triggered: 05-17-2021". The recipient is "To: Suzanne Mesa". The email body starts with "IMPORTANT ALERT" and informs Suzanne that a new Risk Management file has been added/changed. It includes the file ID (910), event type (General Event Type: Patient ID/Documentation/Consent), event date (05-14-2021), and department (PICU South). A red circle with the letter "b" highlights the file ID. The footer contains俄文 text: "Было запрошено изображение", "09-14-2021", and "Если вы не хотите, чтобы".

RL6 Alert System
Triggered: 05-17-2021

To: Suzanne Mesa

IMPORTANT ALERT

Suzanne, you are receiving this Alert because a new Risk Management file has been added/changed in the system.

This Notification was generated on 05-17-2021 12:00:17.

Below are the links to the files that triggered this Alert.

File ID: **910** 

General Event Type:
Patient ID/Documentation/Consent

Event Date:
05-14-2021

Department:
PICU South

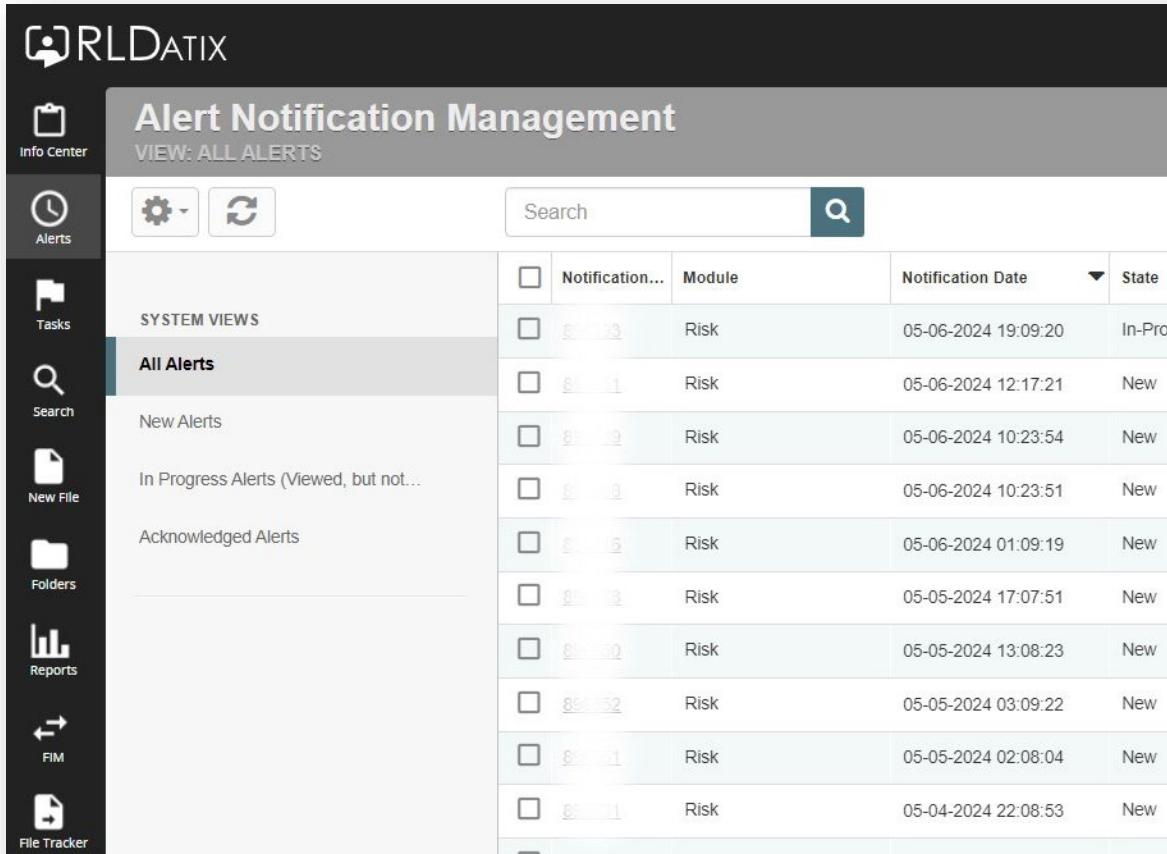
Было запрошено изображение
09-14-2021
Если вы не хотите, чтобы

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



The screenshot shows the RLDATIX Alert Notification Management interface. The left sidebar includes icons for Info Center, Alerts (selected), Tasks, Search, New File, Folders, Reports, FIM, and File Tracker. The main header is "Alert Notification Management" with "VIEW: ALL ALERTS". Below the header is a search bar with a magnifying glass icon. The main content area is titled "SYSTEM VIEWS" and shows a table of "All Alerts". The table columns are: Notification..., Module, Notification Date, and State. The data in the table is as follows:

Notification...	Module	Notification Date	State
 89-53	Risk	05-06-2024 19:09:20	In-Prog
 89-51	Risk	05-06-2024 12:17:21	New
 89-50	Risk	05-06-2024 10:23:54	New
 89-49	Risk	05-06-2024 10:23:51	New
 89-48	Risk	05-06-2024 01:09:19	New
 89-47	Risk	05-05-2024 17:07:51	New
 89-46	Risk	05-05-2024 13:08:23	New
 89-45	Risk	05-05-2024 03:09:22	New
 89-44	Risk	05-05-2024 02:08:04	New
 89-43	Risk	05-04-2024 22:08:53	New

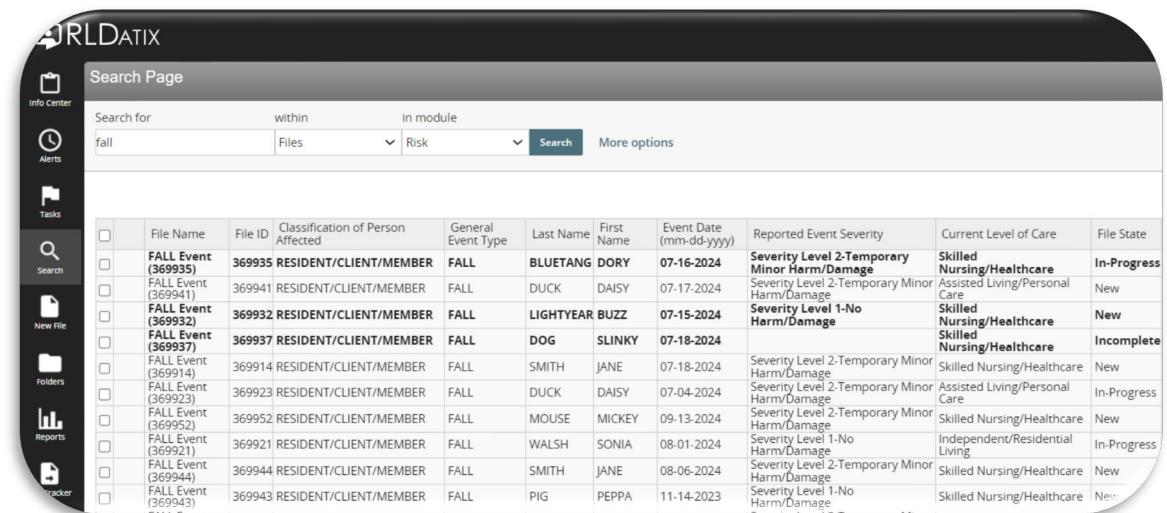
Your alerts will also show within the Alerts tab in PEER

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

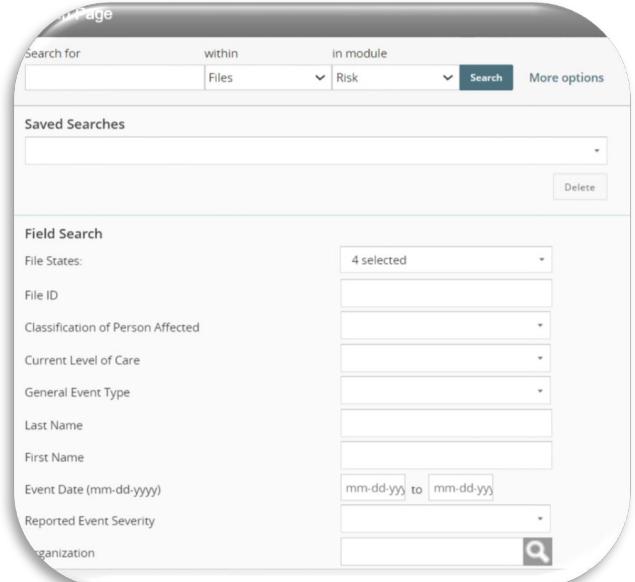
You can also search for events by typing a search term into search bar



The screenshot shows the WRLDATIX Search Page. The search term 'fall' is entered in the 'Search for' field. The results table includes columns for File Name, File ID, Classification of Person Affected, General Event Type, Last Name, First Name, Event Date, Reported Event Severity, Current Level of Care, and File State. The results list several 'FALL Event' entries with various details like 'DAISY' and 'SLINKY' as names, and 'FALL' as the general event type.

	File Name	File ID	Classification of Person Affected	General Event Type	Last Name	First Name	Event Date (mm-dd-yyyy)	Reported Event Severity	Current Level of Care	File State
<input type="checkbox"/>	FALL Event (369935)	369935	RESIDENT/CLIENT/MEMBER	FALL	BLUETANG	DORY	07-16-2024	Severity Level 2-Temporary Minor Harm/Damage	Skilled Nursing/Healthcare	In-Progress
<input type="checkbox"/>	FALL Event (369941)	369941	RESIDENT/CLIENT/MEMBER	FALL	DUCK	DAISY	07-17-2024	Severity Level 2-Temporary Minor Harm/Damage	Assisted Living/Personal Care	New
<input type="checkbox"/>	FALL Event (369932)	369932	RESIDENT/CLIENT/MEMBER	FALL	LIGHTYEAR	BUZZ	07-15-2024	Severity Level 1-No Harm/Damage	Skilled Nursing/Healthcare	New
<input type="checkbox"/>	FALL Event (369937)	369937	RESIDENT/CLIENT/MEMBER	FALL	DOG	SLINKY	07-18-2024	Severity Level 1-No Harm/Damage	Skilled Nursing/Healthcare	Incomplete
<input type="checkbox"/>	FALL Event (369914)	369914	RESIDENT/CLIENT/MEMBER	FALL	SMITH	JANE	07-18-2024	Severity Level 2-Temporary Minor Harm/Damage	Skilled Nursing/Healthcare	New
<input type="checkbox"/>	FALL Event (369923)	369923	RESIDENT/CLIENT/MEMBER	FALL	DUCK	DAISY	07-04-2024	Severity Level 2-Temporary Minor Harm/Damage	Assisted Living/Personal Care	In-Progress
<input type="checkbox"/>	FALL Event (369952)	369952	RESIDENT/CLIENT/MEMBER	FALL	MOUSE	MICKEY	09-13-2024	Severity Level 2-Temporary Minor Harm/Damage	Skilled Nursing/Healthcare	New
<input type="checkbox"/>	FALL Event (369921)	369921	RESIDENT/CLIENT/MEMBER	FALL	WALSH	SONIA	08-01-2024	Severity Level 1-No Harm/Damage	Independent/Residential Living	In-Progress
<input type="checkbox"/>	FALL Event (369944)	369944	RESIDENT/CLIENT/MEMBER	FALL	SMITH	JANE	08-06-2024	Severity Level 2-Temporary Minor Harm/Damage	Skilled Nursing/Healthcare	New
<input type="checkbox"/>	FALL Event (369943)	369943	RESIDENT/CLIENT/MEMBER	FALL	PIG	PEPPA	11-14-2023	Severity Level 1-No Harm/Damage	Skilled Nursing/Healthcare	New

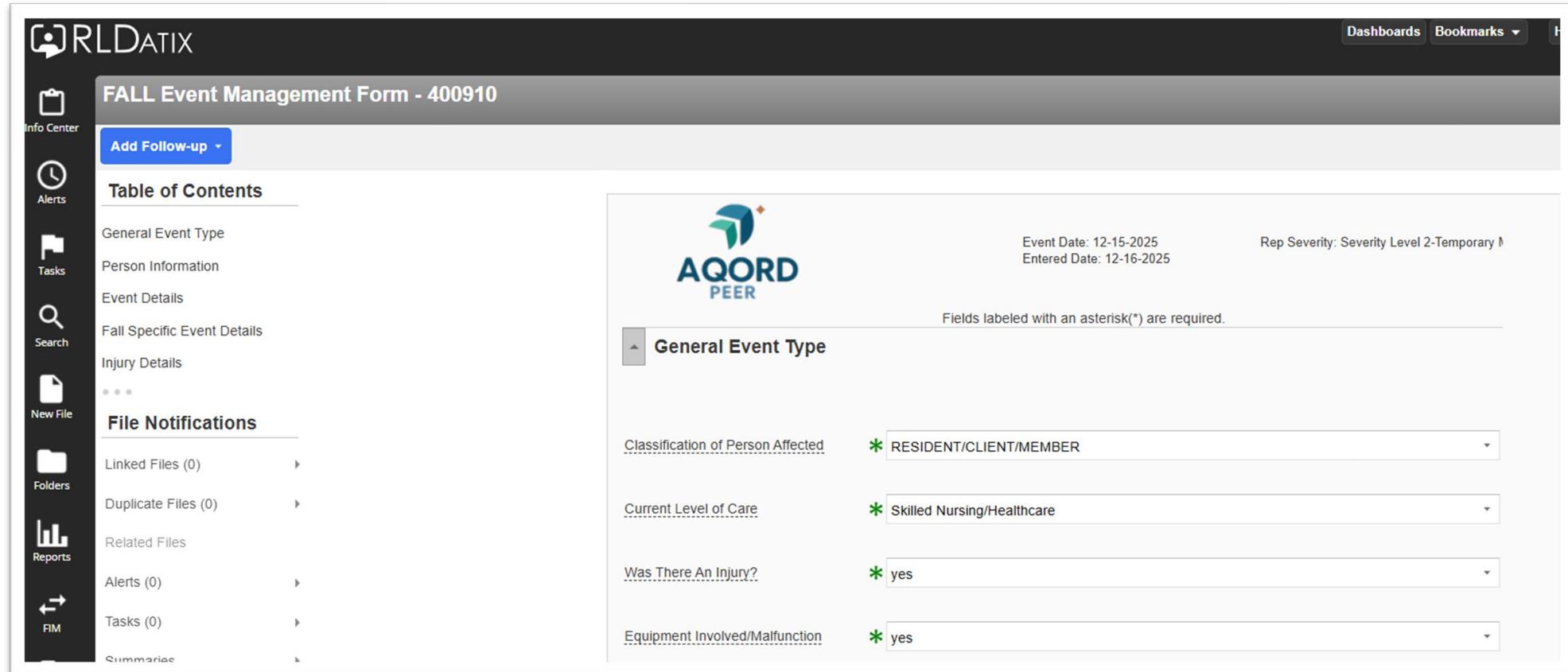
Or you can expand your search by clicking the blue "more options" link next to the search button for even more criteria!



The screenshot shows the WRLDATIX Search Page with the 'More options' link selected. This expands the search interface to include fields for File States, File ID, Classification of Person Affected, Current Level of Care, General Event Type, Last Name, First Name, Event Date, Reported Event Severity, Organization, and a search icon.

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.



The screenshot shows the RLDATIX software interface. The top navigation bar includes 'Dashboards', 'Bookmarks', and a user icon. The main title is 'FALL Event Management Form - 400910'. A blue 'Add Follow-up' button is visible in the upper left. The left sidebar contains icons for 'Info Center', 'Alerts', 'Tasks', 'Search', 'New File', 'Folders', 'Reports', 'FIM', and 'Summaries'. The 'Table of Contents' section lists: General Event Type, Person Information, Event Details, Fall Specific Event Details, Injury Details, and '...' (ellipsis). The 'File Notifications' section lists: Linked Files (0), Duplicate Files (0), Related Files, Alerts (0), Tasks (0), and Summaries. The right side displays the 'AQORD PEER' event details, including the logo, event date (12-15-2025), entered date (12-16-2025), and report severity (Severity Level 2-Temporary). A note states: 'Fields labeled with an asterisk(*) are required.' The 'General Event Type' section contains the following fields with asterisks: Classification of Person Affected (RESIDENT/CLIENT/MEMBER), Current Level of Care (Skilled Nursing/Healthcare), Was There An Injury? (yes), and Equipment Involved/Malfunction (yes).

FALL Event Management Form - 400910

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

AQORD PEER

Event Date: 12-15-2025 Rep Severity: Severity Level 2-Temporary

Entered Date: 12-16-2025

Fields labeled with an asterisk(*) are required.

General Event Type

Field	Value
Classification of Person Affected	RESIDENT/CLIENT/MEMBER
Current Level of Care	Skilled Nursing/Healthcare
Was There An Injury?	yes
Equipment Involved/Malfunction	yes

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.

Type	Work done on file
Sub-Type	*
Date	* 09-23-2024
Followup By	* Linda Durbin
Followup To/With	
Item Purchased	
Detail	
Form Letters:	Please Select
Organization Outcome	

Cancel **Add**

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

Sub-Type	Followup By	Followup To/With	Date
Investigation	Linda Durbin		09-23-2024

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	
Type	Review
Sub-Type	* Reviewed
Date	* 09-23-2024
Followup By	* Linda Durbin
Followup To/With	
Item Purchased	
Detail	
Form Letters:	Please Select
	Populate Email Print Download

Add

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
<input type="checkbox"/>			Work done on file	Investigation	Linda Durbin	09-23-2024
<input type="checkbox"/>			Review	Reviewed	Linda Durbin	09-23-2024

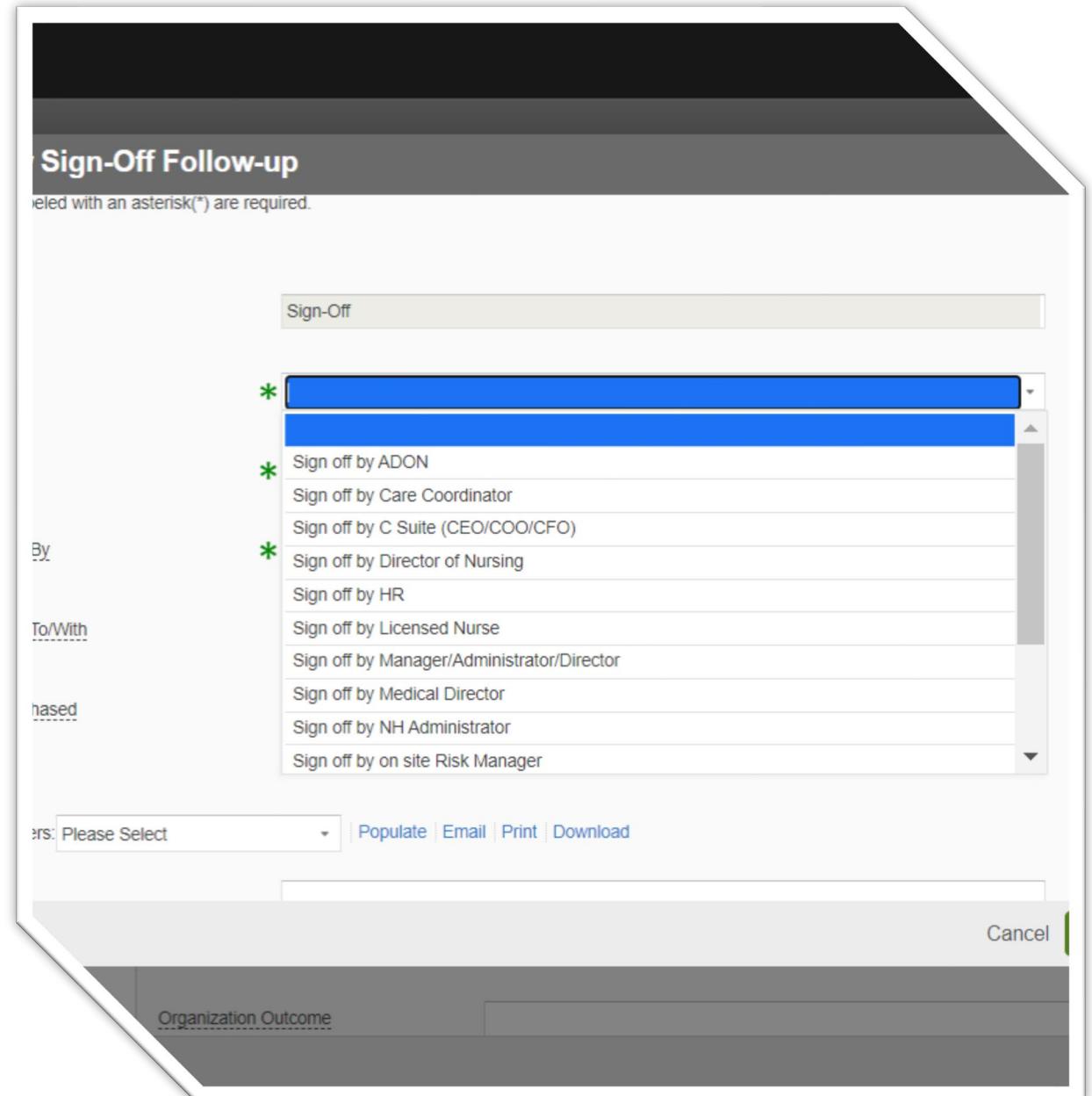
Signing off on a file

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.



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"

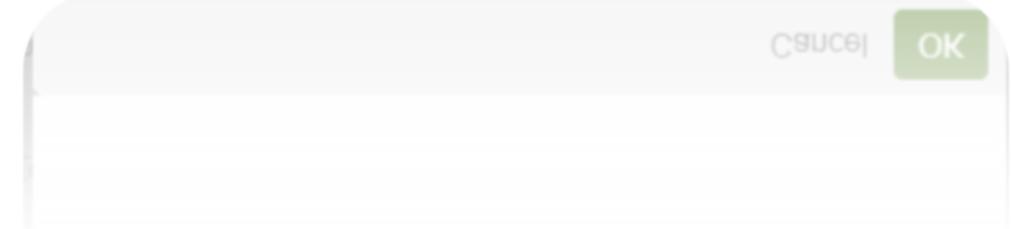
The image shows two screenshots of a software interface. The top screenshot is the 'File Info Center' with a 'FILE BROWSE' tab selected. It displays a list of files with columns for File ID, Event Date, General Event Type, and various status indicators like 'SKIN/ISSUE', 'FALL', and 'COMPLAINT/GRIEV...'. A 'More' tab is open, showing options like 'Download', 'Important', 'Confidential', 'Add to Folder', 'Change Owner', 'Change State', 'Properties', 'Close', and 'Delete'. The bottom screenshot shows an event file detail page for file ID 369955. It includes sections for 'Followup List' (with a note about documenting task completion), 'Follow-ups' (listing work done on file and review), 'Resolution/Outcome' (listing risk manager review, person affected, actual event severity, actual contributing factors, and organization outcome), and a 'More Options' sidebar with actions like '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', and 'Save & Exit'.

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.

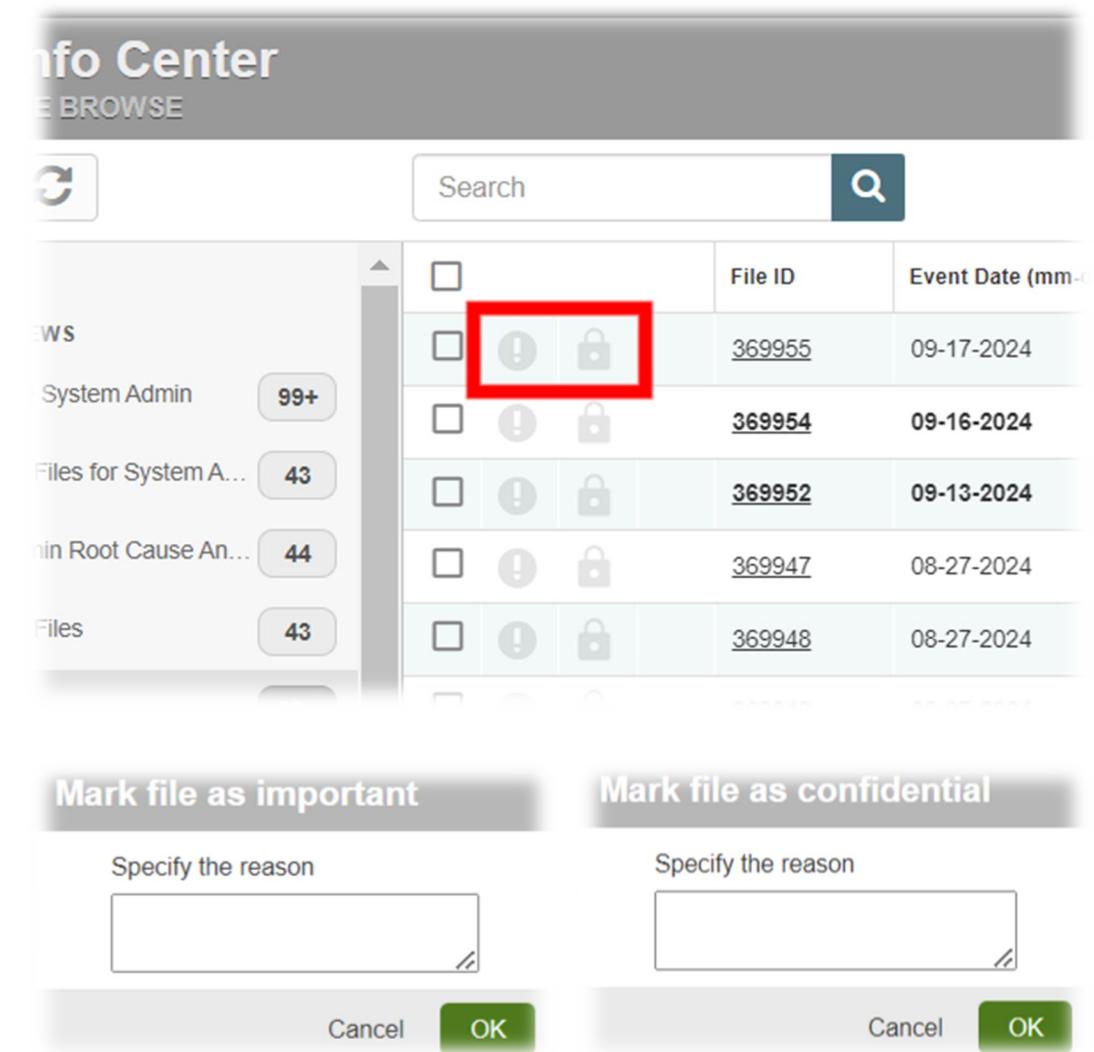


Marking a File as Important or Confidential *from the Info Center*

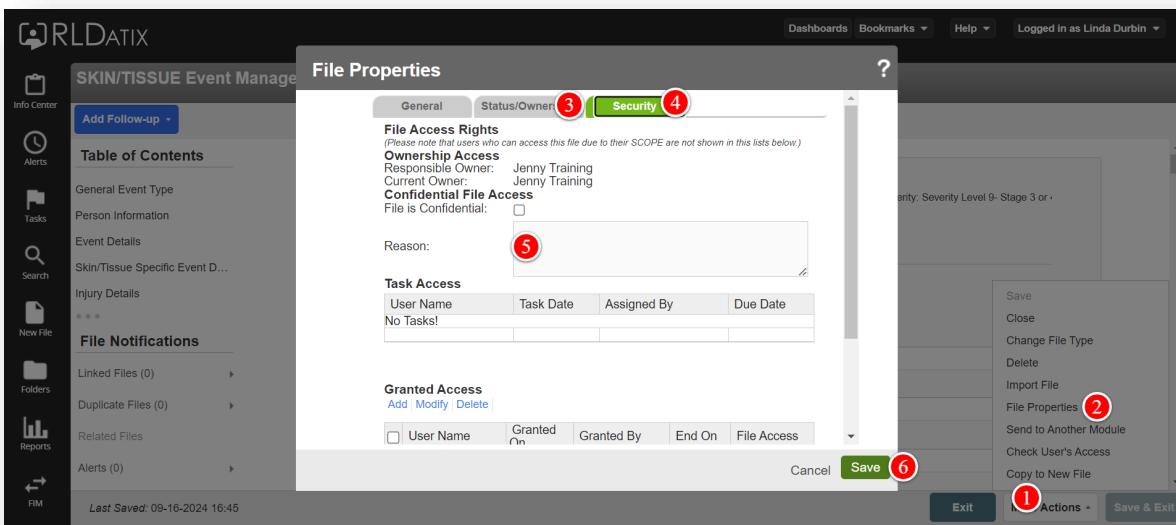
Click the exclamation point to mark a file as Important
Click the lock to mark a file as confidential
Specify the reason in the pop-up dialog box

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
AQORD PEER
Support**