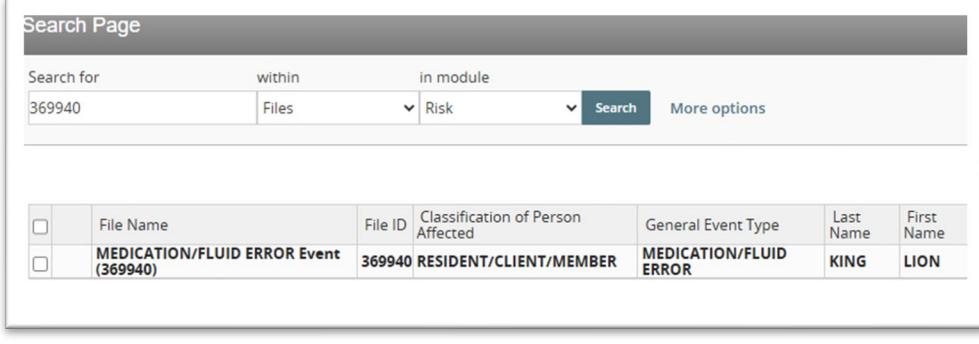
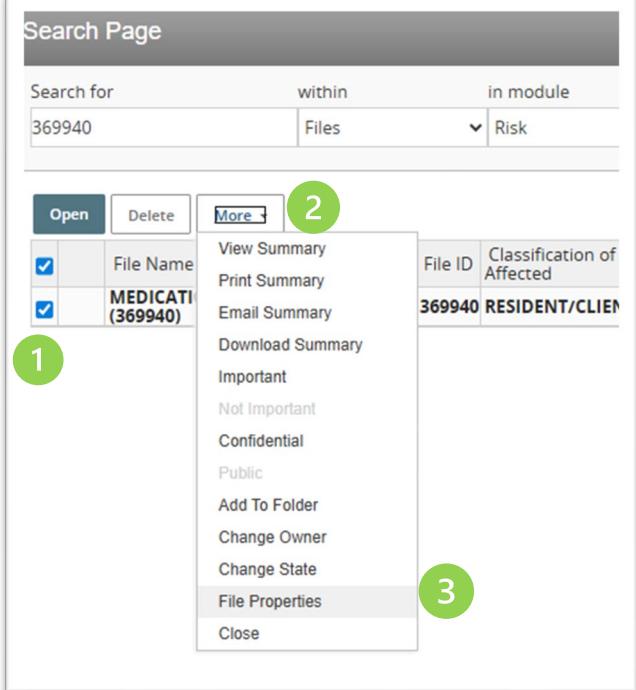


Risk Managers can grant access to files on an individual basis if an event occurs that a file manager needs to access and it does not fall within their normal scope. \*This is a unique circumstance. If the file manager will need to access events like this in the future as well, please consider updating their scope.

## Granting Access to a File Outside of the File Manager's scope

<p>Locate the event for which you would like to grant access.</p> <p>You can perform a search, as seen to the right.</p> <p>Or, you can locate the event from the info center.</p>	
<p>Click within the empty check box to the left of the event to select it.</p> <p>The options: "Open," "Delete," and "More," will appear.</p> <p>Click on the option "More" to show the drop-down menu.</p> <p>From the "More" menu, select the option "File Properties."</p>	

Selecting “File Properties” from the more options tab as shown in the step above, will bring up the File Properties dialog box.

From the 3 tabs across the top: General, Status/Ownership, and Security, click on the “Security” tab.

Scroll down to expose the last section titled “Granted Access.”

**File Properties**

General Status/Ownership **Security** 1

**File Access Rights**  
(Please note that users who can access this file due to their SCOPE are not shown in this lists below.)

**Ownership Access**  
Responsible Owner: Linda Test  
Current Owner: Linda Test

**Confidential File Access**  
File is Confidential:

Reason:

**Task Access**

User Name	Task Date	Assigned By	Due Date
No Tasks!			

2 **Granted Access**

Add | Modify | Delete

<input type="checkbox"/> User Name	Granted On	Granted By	End On	File Access
No Granted Access!				

Cancel **Save**

Click on the blue “Add” link under the title “Granted Access.”

In the example to the right, you can see that this file currently has no file managers who have been granted access.

**Granted Access**

Add | Modify | Delete

<input type="checkbox"/> User Name	Granted On	Granted By	End On	File Access
No Granted Access!				

Clicking “add” will bring up the “Granted Access” Dialog box

Click on the “+” sign to add a user

### Granted Access

User Name: **1**

End On:

File Access:

Cancel **OK**

If you know the userid, type that into the first box and click the blue “search” link

Alternately, you can search using name, title, or Dept

\*In most cases Dept is the same as your organization name. If you have several organizations, the Dept name is the top level organization name.

Click the blue “search” link to display all results that match your search.

### Select Users

Please enter the user information you would like to search for:

UserID starts with:

Name contains

Title contains

Dept. contains

- OR -

Name contains

Title contains

Dept. contains

Active Users  Inactive Users

[Search](#) [Reset](#)

Search Result

<input type="checkbox"/>	User ID	Full Name	Title	Dept.
--------------------------	---------	-----------	-------	-------

No Data

Cancel **OK**

Select the user you would like to grant access to by clicking int eh checkbox next to the name.

\*Be sure to check that the this is in fact the correct user and they are at your Dept. Similar names exist in the system, so it is important to ensure you are selecting the right account.

Click the green “OK”

This will bring you back to the “Granted Access Dialog box” – with the user name you selected

End on – this will allow you select a date to end the user’s access. This can be left blank to grant access indefinitely

File Access – select the option you would like for this user. Read only, Add Follow-Up, or All. All will allow the user to add follow-up and edit fields.

Click the green “OK”

**Select Users**

Please enter the user information you would like to search for:  
UserID starts with:   
- OR -  
Name contains   
Title contains   
Dept. contains   
Include:  Active Users  Inactive Users

Search | Reset

User ID	Full Name	Title	Dept.
<input checked="" type="checkbox"/> LTEST	Linda Test	PEER Software Administrator	ABC Life Plan Community

1 matching results found!

Cancel **OK**

**Granted Access**

User Name:  Linda Test **1**

End On:  **1**

File Access:  **2**

Cancel **OK** **3**

This will bring you back to the “File Properties” dialog box.

You will now see that username we just added is in the “Granted Access” box.

Click the green “Save”

**File Properties**

Reason:

**Task Access**

User Name	Task Date	Assigned By	Due Date
No Tasks!			

**Granted Access**

Add | Modify | Delete |

User Name	Granted On	Granted By	End On	File Access
Linda Test	12-29-2025	Linda Durbin		All

**1**

Cancel **Save**

From the Info Center: you can open the File Properties by checking off the event, clicking the “More” dropdown and selecting “Properties.”

abc   Summary Print Email More ▾

<input type="checkbox"/>	File ID	Event Date (mm-dd-yyyy)
<input checked="" type="checkbox"/>	370050	02-06-2025
<input type="checkbox"/>	370034	01-28-2025
<input type="checkbox"/>	369947	08-27-2024
<input type="checkbox"/>	369930	08-01-2024
<input type="checkbox"/>	369928	07-12-2024
<input type="checkbox"/>	369934	06-11-2024
<input type="checkbox"/>	369939	06-11-2024
<input type="checkbox"/>	369940	06-11-2024
<input type="checkbox"/>	369933	04-23-2024

Download  
Important  
Confidential  
Add to Folder  
Change Owner  
Change State  
Properties  
Close  
Delete

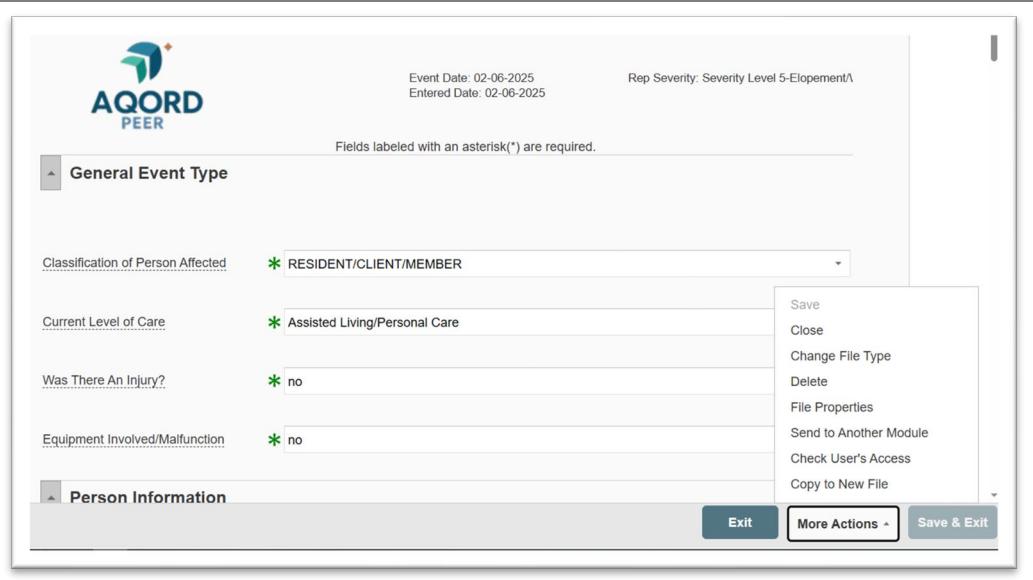
Last Name
TESTER
COPY
DUCK
PAN
SNOWMAI
DAISY
BELL
KING
SLEEPING
BEAUTY

Didn't find what you were looking for? Only files created in the last 2 year(s) are considered for the

From within the file:

Click on the “More Actions” tab in the lower right

Select “File Properties”



The screenshot shows a software interface for managing files. At the top, there is a logo for "AQORD PEER" and some status information: "Event Date: 02-06-2025", "Entered Date: 02-06-2025", and "Rep Severity: Severity Level 5-Elopement\>". Below this, a section titled "General Event Type" contains several fields with required entries marked with an asterisk (\*): "Classification of Person Affected" (RESIDENT/CLIENT/MEMBER), "Current Level of Care" (Assisted Living/Personal Care), "Was There An Injury?" (no), and "Equipment Involved/Malfunction" (no). At the bottom of this section is a "Person Information" header. In the bottom right corner of the main form, there are three buttons: "Exit", "More Actions", and "Save & Exit". A context menu is open on the right side of the screen, listing the following options: Save, Close, Change File Type, Delete, File Properties, Send to Another Module, Check User's Access, and Copy to New File.

Notes:

- You can grant access to multiple users
- You DO NOT need to do this if the file manager has access to the file already based on their scope
- Temporary or permanent access to the file can be removed at any time by a Risk Manager or Admin by going into the Security Tab and deleting the file manager's name from the Granted Access table