

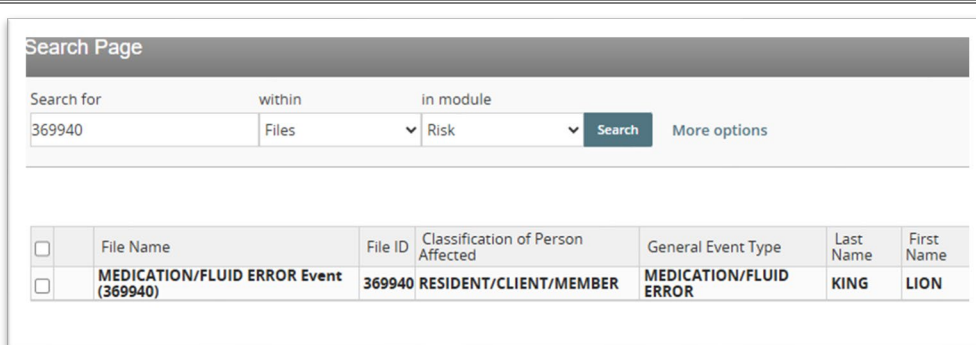
Risk Managers can grant access to files on an individual basis if an event occurs that a file manager needs to access and it does not fall within their normal scope. \*This is a unique circumstance. If the file manager will need to access events like this in the future as well, please consider updating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

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

Locate the event for which you would like to grant access.

You can perform a search, as seen to the right.

Or, you can locate the event from the info center.



Search for	within	in module	Search	More options
369940	Files	Risk		

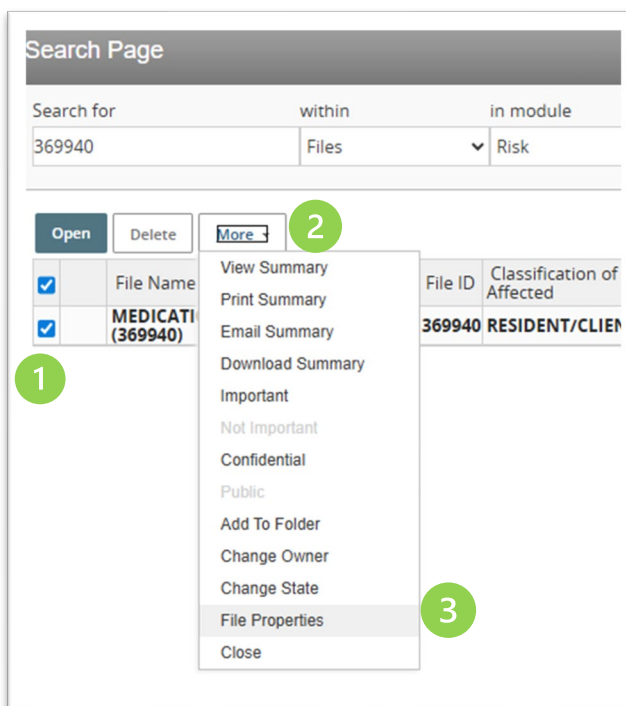
	File Name	File ID	Classification of Person Affected	General Event Type	Last Name	First Name
<input type="checkbox"/>	MEDICATION/FLUID ERROR Event (369940)	369940	RESIDENT/CLIENT/MEMBER	MEDICATION/FLUID ERROR	KING	LION

Click within the empty check box to the left of the event to select it.

The options: "Open," "Delete," and "More," will appear.

Click on the option "More" to show the drop-down menu.

From the "More" menu, select the option "File Properties."



Search for	within	in module
369940	Files	Risk

	File Name	File ID	Classification of Person Affected
<input checked="" type="checkbox"/>	MEDICATION/FLUID ERROR Event (369940)	369940	RESIDENT/CLIENT/MEMBER

Open
Delete
More

View Summary  
Print Summary  
Email Summary  
Download Summary  
Important  
Not Important  
Confidential  
Public  
Add To Folder  
Change Owner  
Change State  
File Properties  
Close

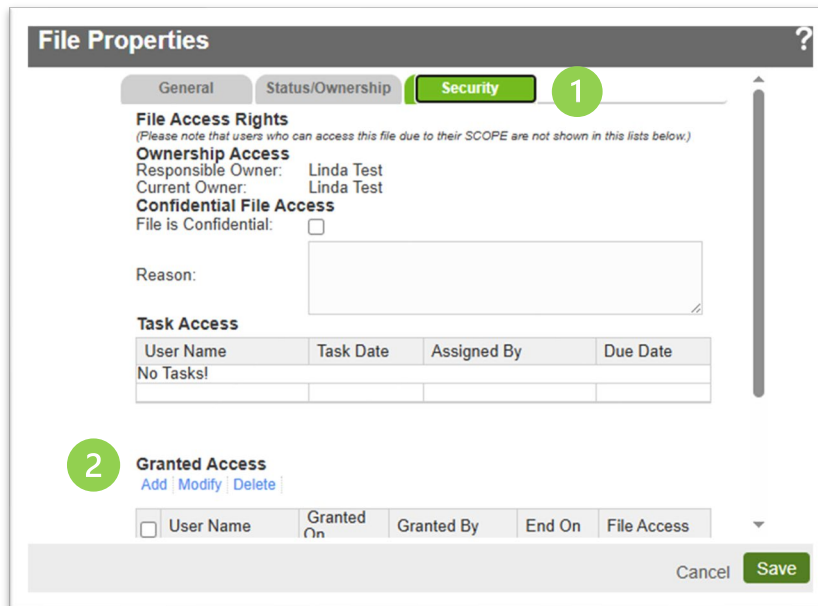
Selecting “File Properties” from the more options tab as shown in the step above, will bring up the File Properties dialog box.

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.”

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.



**File Properties**

General Status/Ownership **Security**

**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:

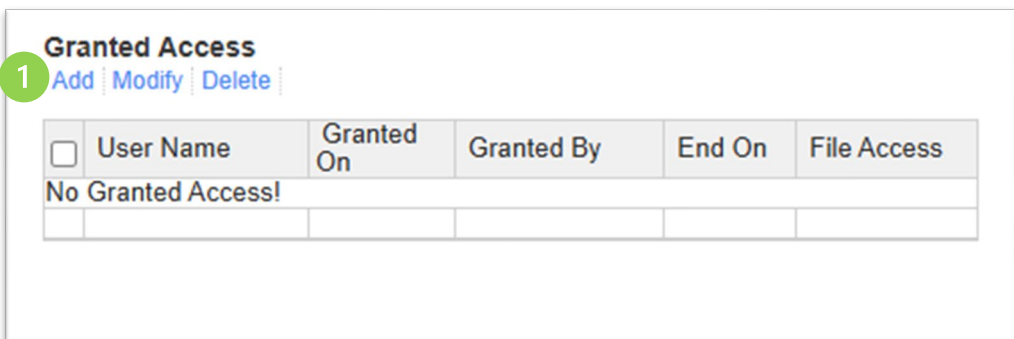
**Task Access**

User Name	Task Date	Assigned By	Due Date
No Tasks!			

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

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

Cancel Save

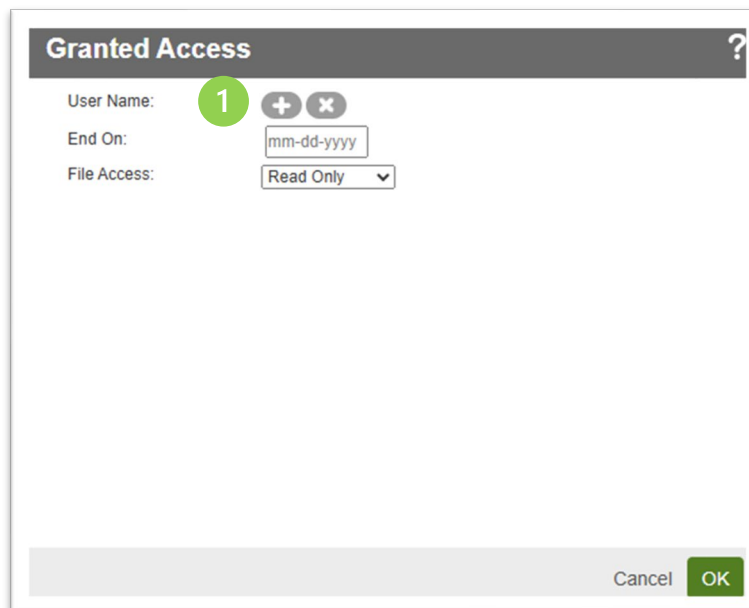


**Granted Access**  
[Add](#) [Modify](#) [Delete](#)

<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



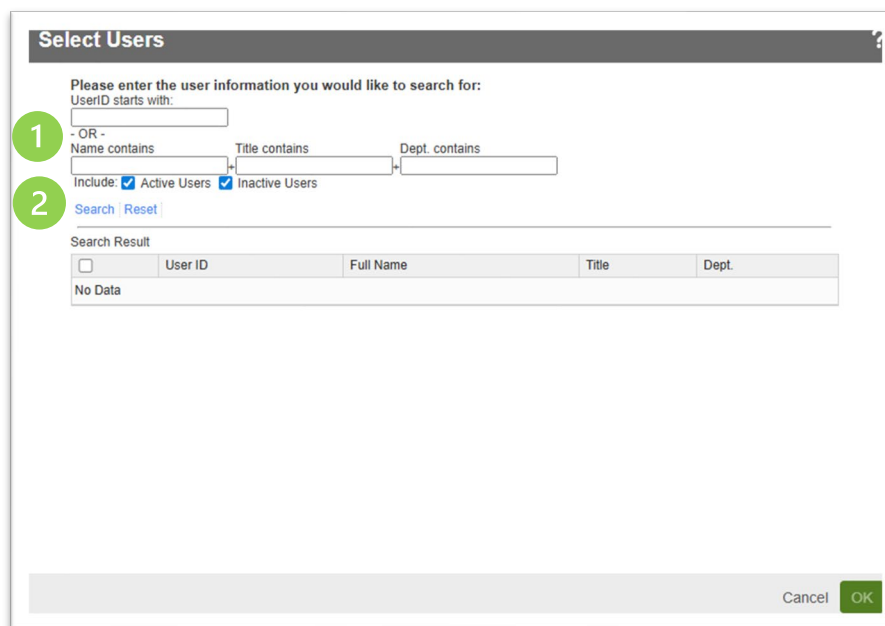
The "Granted Access" dialog box has a title bar with a question mark icon. It contains three input fields: "User Name:" with a green circle '1' and a "+" button next to it, "End On:" with a date picker showing "mm-dd-yyyy", and "File Access:" with a dropdown menu set to "Read Only". At the bottom right are "Cancel" and "OK" buttons.

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.

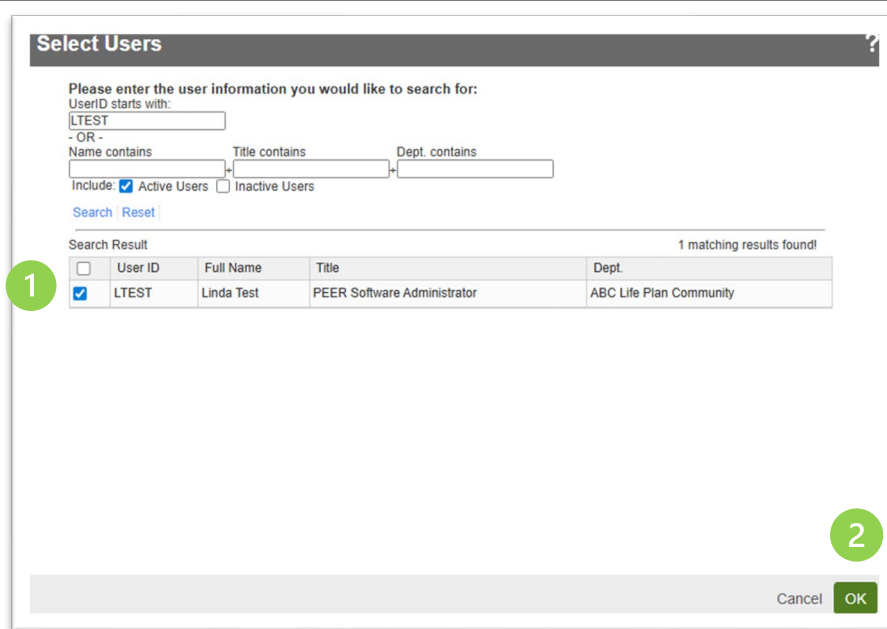


The "Select Users" dialog box has a title bar with a question mark icon. It contains a search section with a "Please enter the user information you would like to search for:" label. Below this is a "UserID starts with:" input field. A green circle '1' is next to a "- OR -" separator. Below the separator are three input fields: "Name contains", "Title contains", and "Dept. contains". A green circle '2' is next to the "Name contains" field. Below these fields are two checkboxes: "Include: ☒ Active Users" and "☒ Inactive Users". Below the checkboxes are "Search" and "Reset" links. Below the search section is a "Search Result" table with columns: "User ID", "Full Name", "Title", and "Dept.". The table currently shows "No Data". At the bottom right are "Cancel" and "OK" buttons.

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

\*Be sure to check that 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”



**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](#)

Search Result 1 matching results found!

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

2

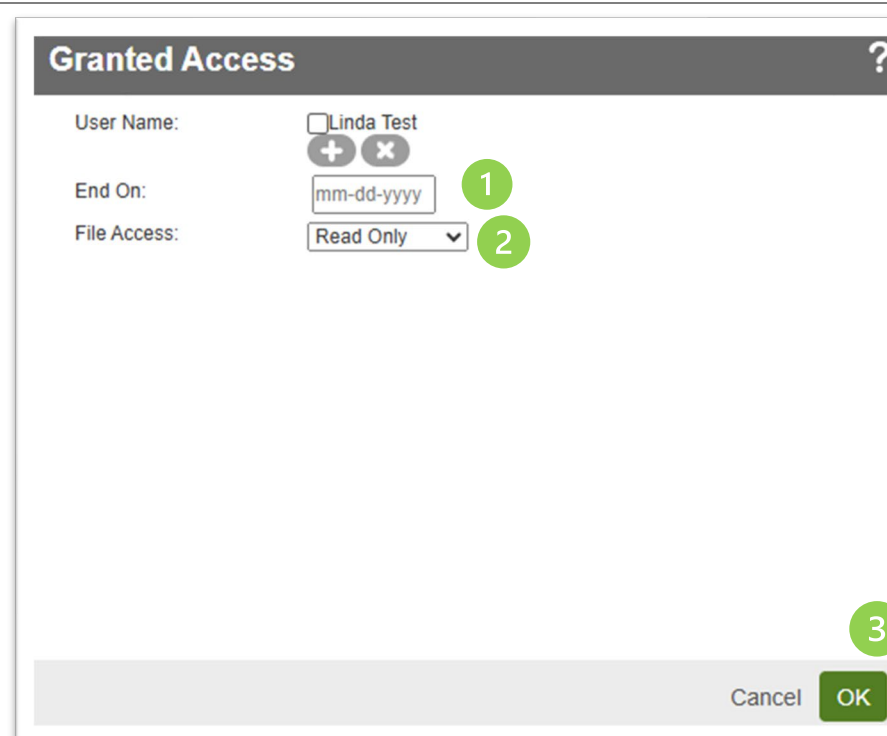
[Cancel](#) [OK](#)

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”



**Granted Access** ?

User Name:  + x

End On:  1

File Access:  2

3

[Cancel](#) [OK](#)

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

<input type="checkbox"/>	User Name	Granted On	Granted By	End On	File Access
<input type="checkbox"/>	Linda Test	12-29-2025	Linda Durbin		All

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)	Last Name
<input checked="" type="checkbox"/>	<a href="#">370050</a>	02-06-2025	TESTER
<input type="checkbox"/>	<a href="#">370034</a>	01-28-2025	COPY
<input type="checkbox"/>	<a href="#">369947</a>	08-27-2024	DUCK
<input type="checkbox"/>	<a href="#">369930</a>	08-01-2024	PAN
<input type="checkbox"/>	<a href="#">369928</a>	07-12-2024	SNOWMAI
<input type="checkbox"/>	<a href="#">369934</a>	06-11-2024	DAISY
<input type="checkbox"/>	<a href="#">369939</a>	06-11-2024	TINKER
<input type="checkbox"/>	<a href="#">369940</a>	06-11-2024	LION
<input type="checkbox"/>	<a href="#">369933</a>	04-23-2024	SLEEPING
			BELL
			KING
			BEAUTY

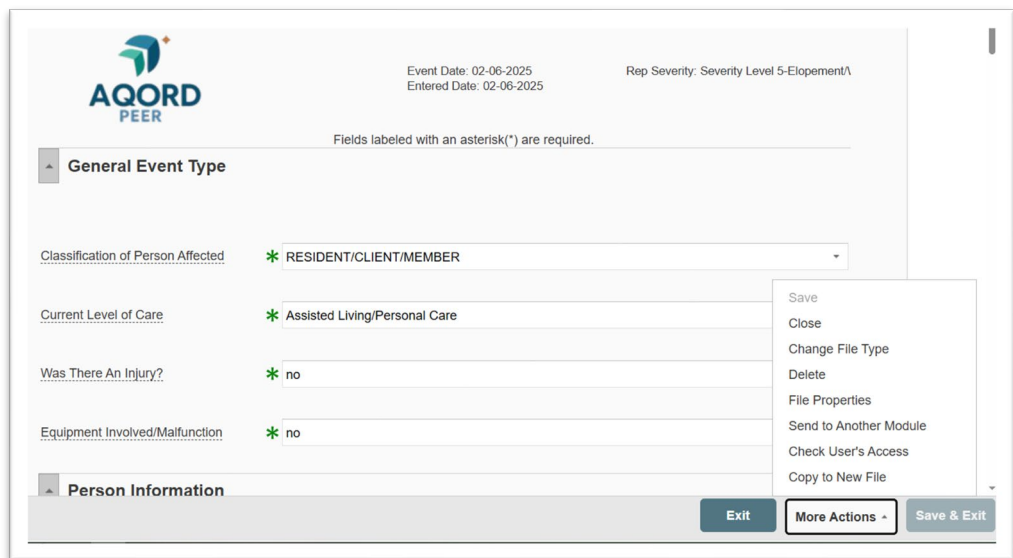
Download  
Important  
Confidential  
Add to Folder  
Change Owner  
Change State  
Properties  
Close  
Delete

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”



Event Date: 02-06-2025  
Entered Date: 02-06-2025  
Rep Severity: Severity Level 5-Elopement/A

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

**General Event Type**

Classification of Person Affected \* RESIDENT/CLIENT/MEMBER

Current Level of Care \* Assisted Living/Personal Care

Was There An Injury? \* no

Equipment Involved/Malfunction \* no

**Person Information**

Exit More Actions Save & Exit

Save  
Close  
Change File Type  
Delete  
File Properties  
Send to Another Module  
Check User's Access  
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