

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

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

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

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

☐ Yes

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

Do you have a role plate (if applicable)

Do you want to mirror Wall

Do you want to mirror Wall

☐ no Closure, no Reports

☐ Manager: no Closure and with Reports

☐ no Closure with Closure and Reports

Who'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



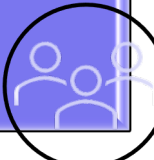
- Can submit files
- Can view files submitted by others
- Can add follow-up
- Can run reports
- Cannot close files

File Manager, no closure, reports



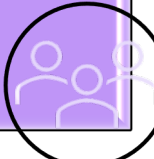
- Can submit files
- Can view files submitted by others
- Can add follow-up
- Cannot use reports
- Cannot Close files

File Manger, no closure, no reports



- Can submit files only

File Submitter



What is a User Scope?



Scopes In PEER

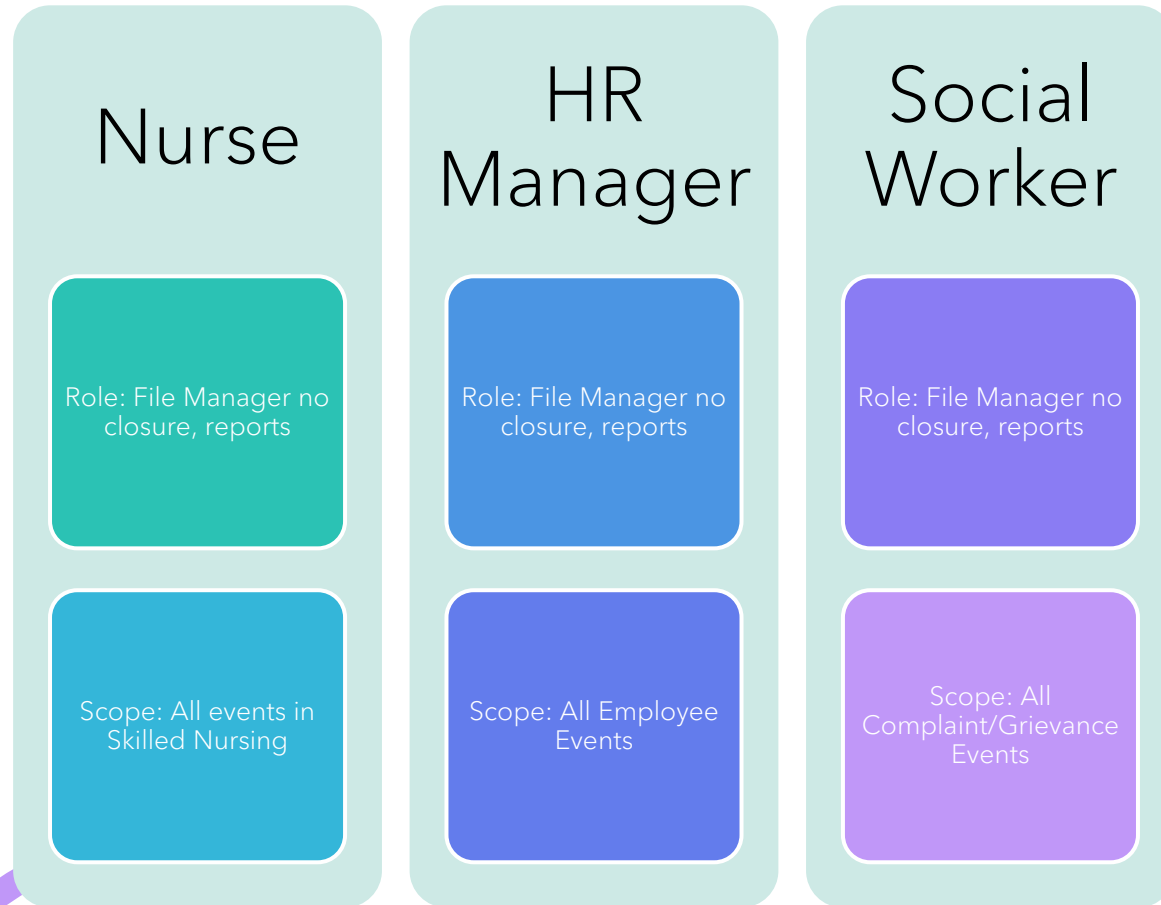
Scopes are what a user will see in PEER

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

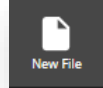
In the example to the left, you can see that the nurse, HR manager, and the social worker all have the same role. This allows them all to manage files and pull reports. They have different scopes, which means the files they see in PEER will be different.

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	Deficiency by DOH or Above	Reportable Request for Medical Records
Infection	Employee General Event	Call Response	Missing/Damaged Items	

Recommendation for Icon Walls

File Submitter Wall



File Manager Wall



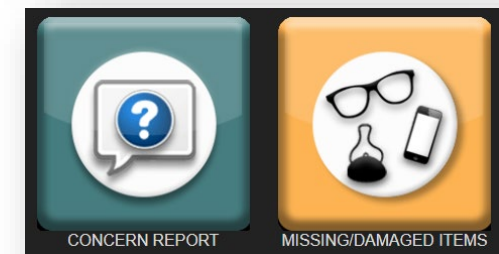
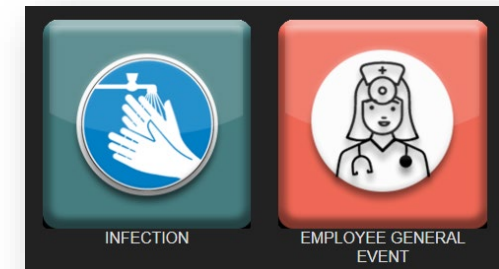
Root Cause

COVID-19

Recommendation for a Risk Manager Icon Wall



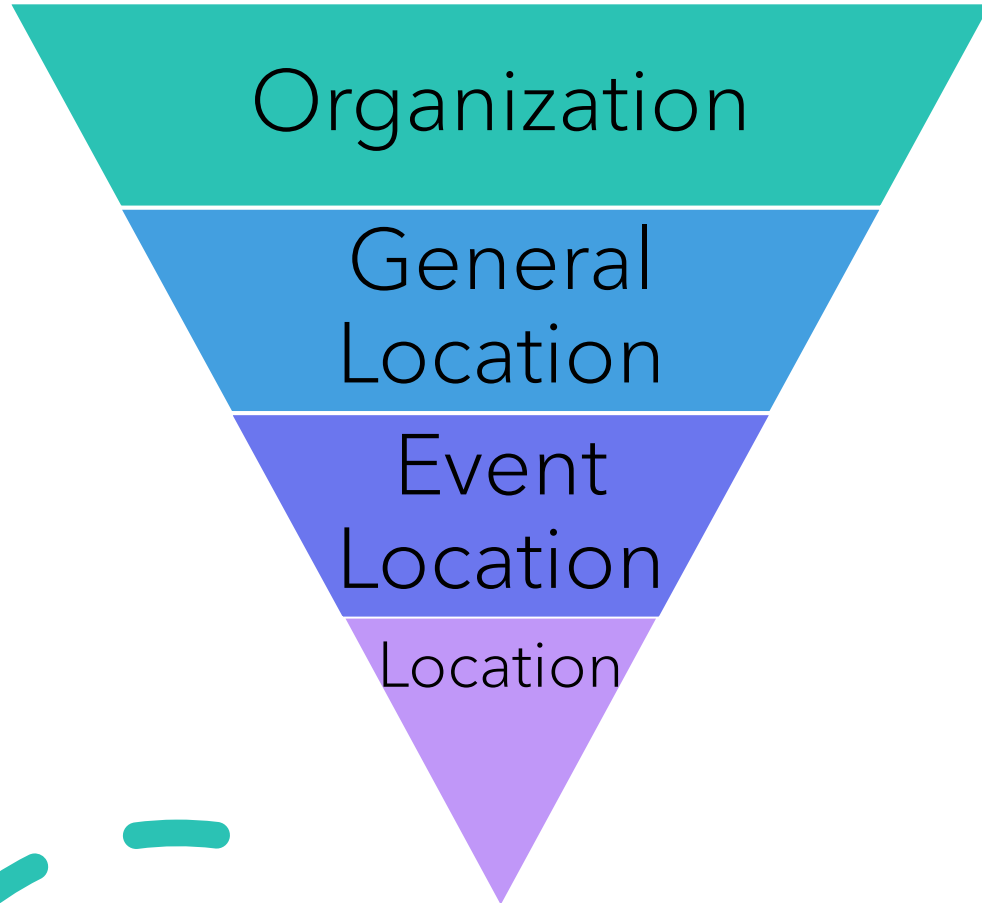
Other available events



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?

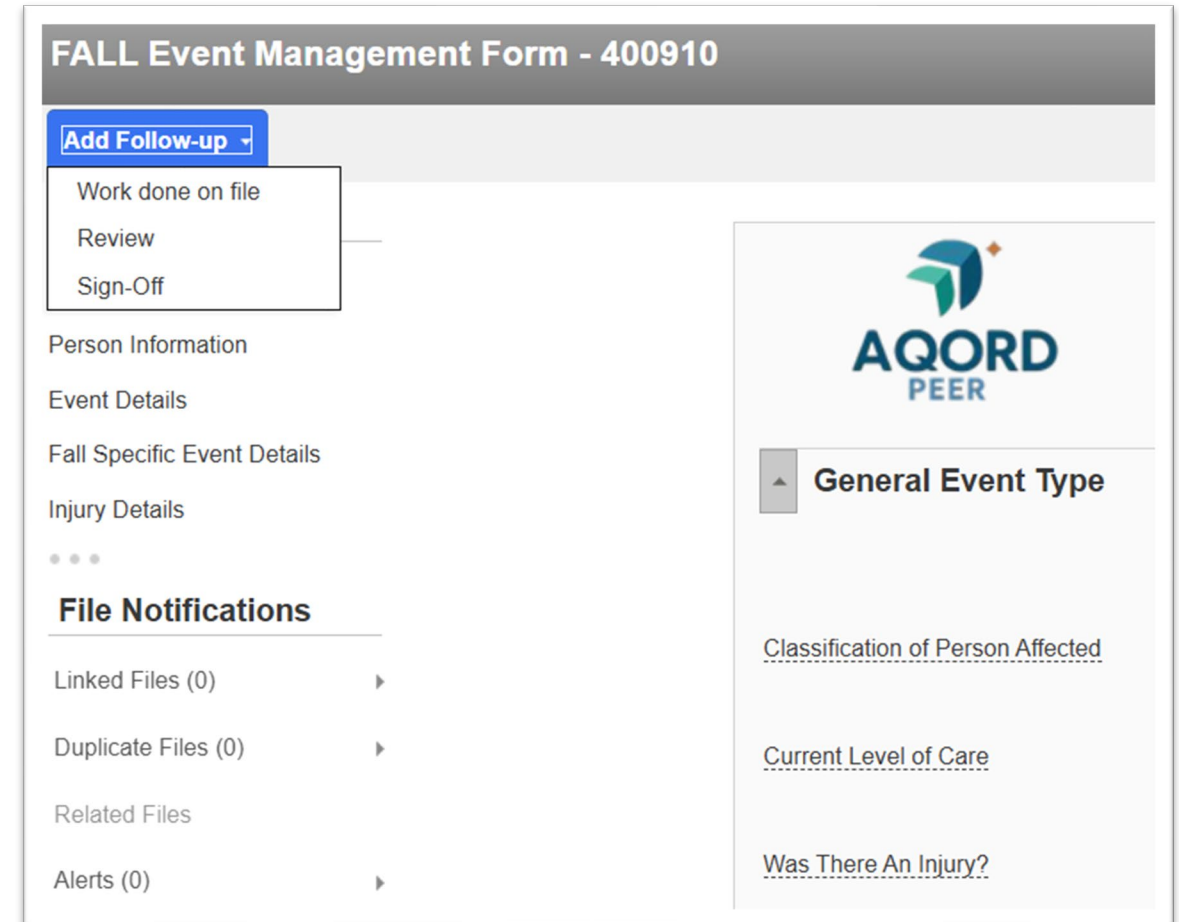


Adding Follow-up

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 - 400910'. At the top, a blue button labeled 'Add Follow-up' is shown with a dropdown menu containing three options: 'Work done on file', 'Review', and 'Sign-Off'. Below this, a sidebar on the left lists sections: 'Person Information', 'Event Details', 'Fall Specific Event Details', 'Injury Details', and 'File Notifications'. The 'File Notifications' section is expanded, showing 'Linked Files (0)', 'Duplicate Files (0)', 'Related Files', and 'Alerts (0)'. On the right side of the form, the 'AQORD PEER' logo is visible above a section titled 'General Event Type'. This section includes three expandable fields: 'Classification of Person Affected', 'Current Level of Care', and 'Was There An Injury?'.

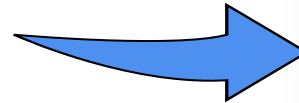
Steps to Add Follow-up

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 - 400910

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: * yes

Person Information

Last Name: * MOUSE First Name: * MINNIE

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

Street: * State: *

Choose File Status

File State: Closed

Select Status: Resolved

Note: Associated duplicate files will also be closed

Cancel OK

More Actions

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

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.' The bottom right of this dialog has a 'Done' button.

	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 is selected, and the "More" dropdown menu is open, showing various actions 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".
- Step 3:** The "Change State" option is selected from the dropdown menu.
- Step 4:** A "Change State" dialog box is shown. The "File State" is set to "In-Progress" and the "Select Status" is set to "Active". The "OK" button is highlighted.

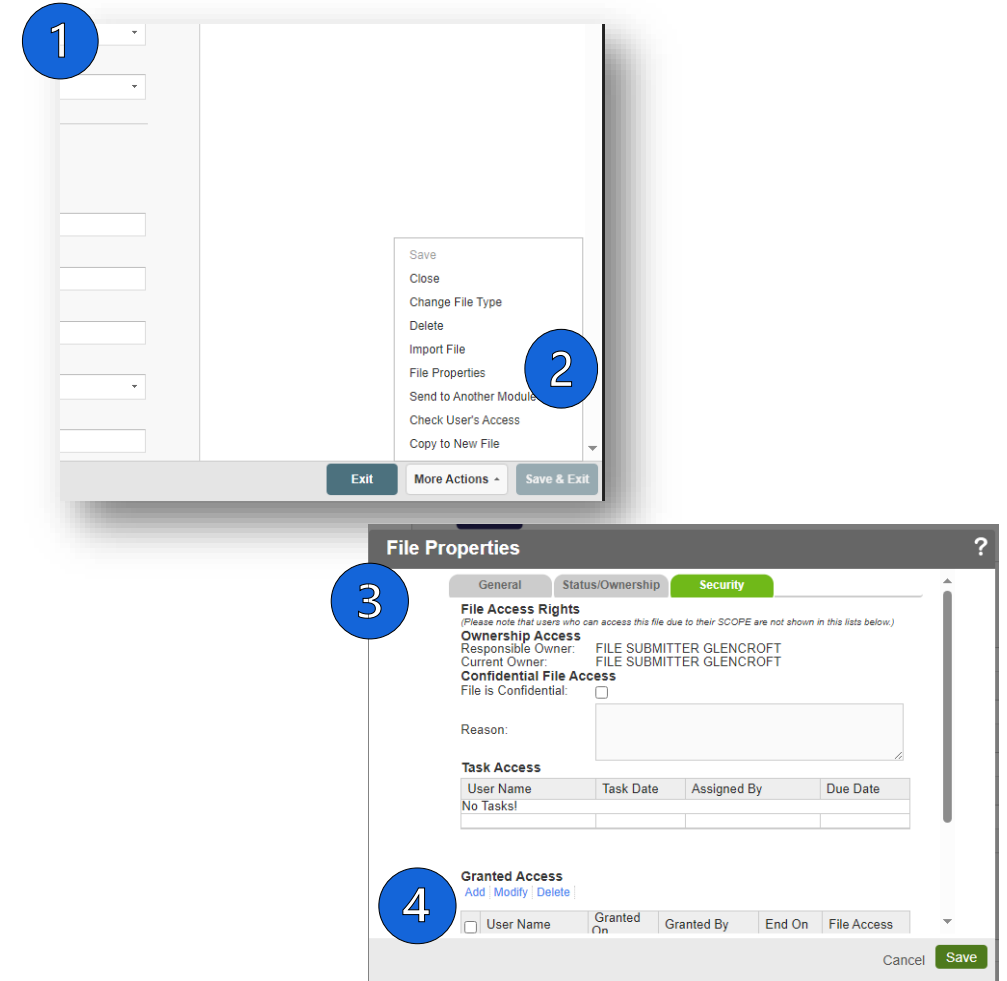
Open	Delete	More	File Name	Location of Person	General Event Type	Last Name	First Name	Event Date (mm-dd-yyyy)	Report
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	SKIN/TISS (369960)	/CLIENT/MEMBER	SKIN/TISSUE	DUCK	DAISY	10-08-2024	Sever Mino
<input checked="" type="checkbox"/>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

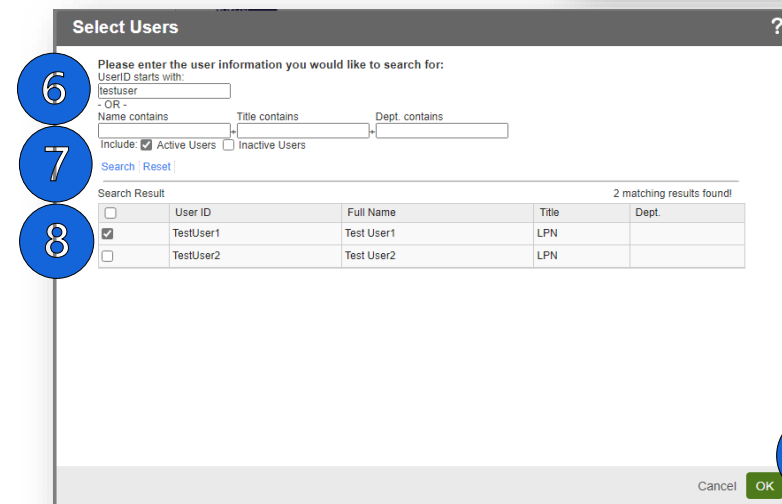
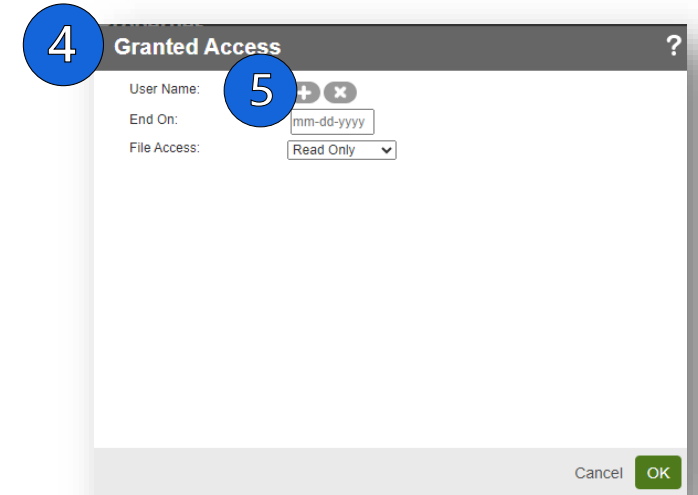


Granting Access to a File – part 2

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

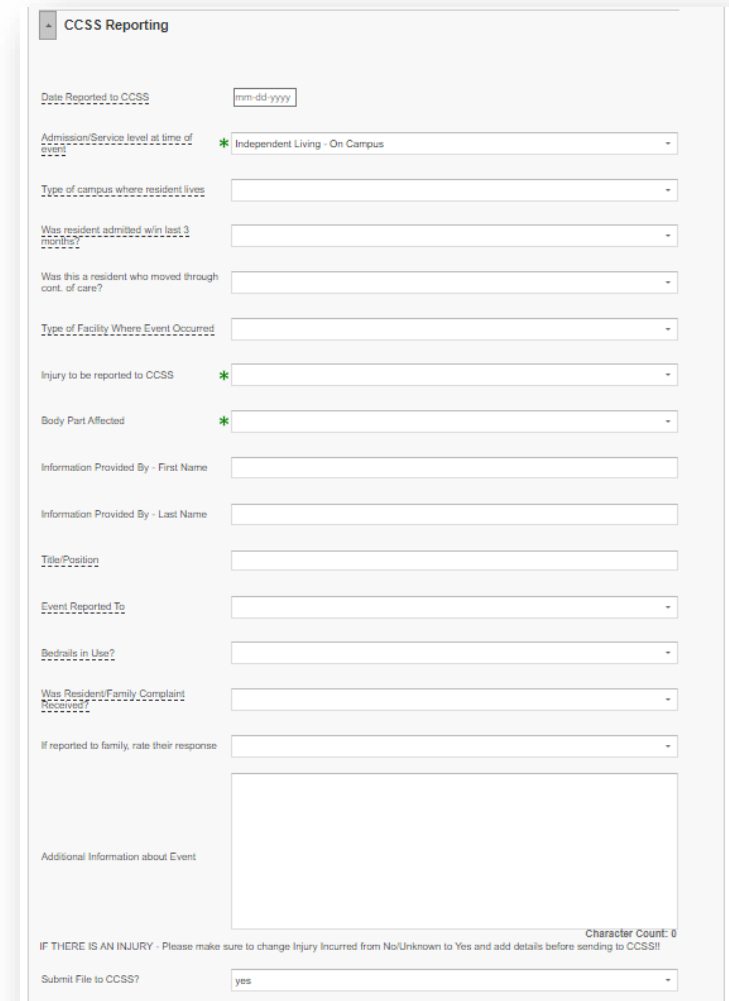
After an event is submitted, you will see a new section, called "CCSS Reporting"

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

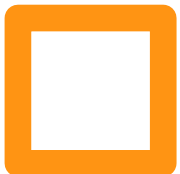
Save and Exit the event form

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" (with a date picker), "Admission/Service level at time of event" (dropdown menu with "Independent Living - On Campus" selected), "Type of campus where resident lives" (dropdown menu), "Was resident admitted w/in last 3 months?" (dropdown menu), "Was this a resident who moved through cont. of care?" (dropdown menu), "Type of Facility Where Event Occurred" (dropdown menu), "Injury to be reported to CCSS" (dropdown menu with a green asterisk), "Body Part Affected" (dropdown menu 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 menu), "Bedrails in Use?" (dropdown menu), "Was Resident/Family Complaint Notified?" (dropdown menu), "If reported to family, rate their response" (dropdown menu), and "Additional Information about Event" (text area). At the bottom, there is a "Character Count: 0" indicator, a note "IF THERE IS AN INJURY - Please make sure to change Injury Incurred from No/Unknown to Yes and add details before sending to CCSS!", and a "Submit File to CCSS?" dropdown menu with "yes" selected.



How do I request an
alert?



Requesting and Alert



Send an email to ldurbin@aqord.org or peer@aqord.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?



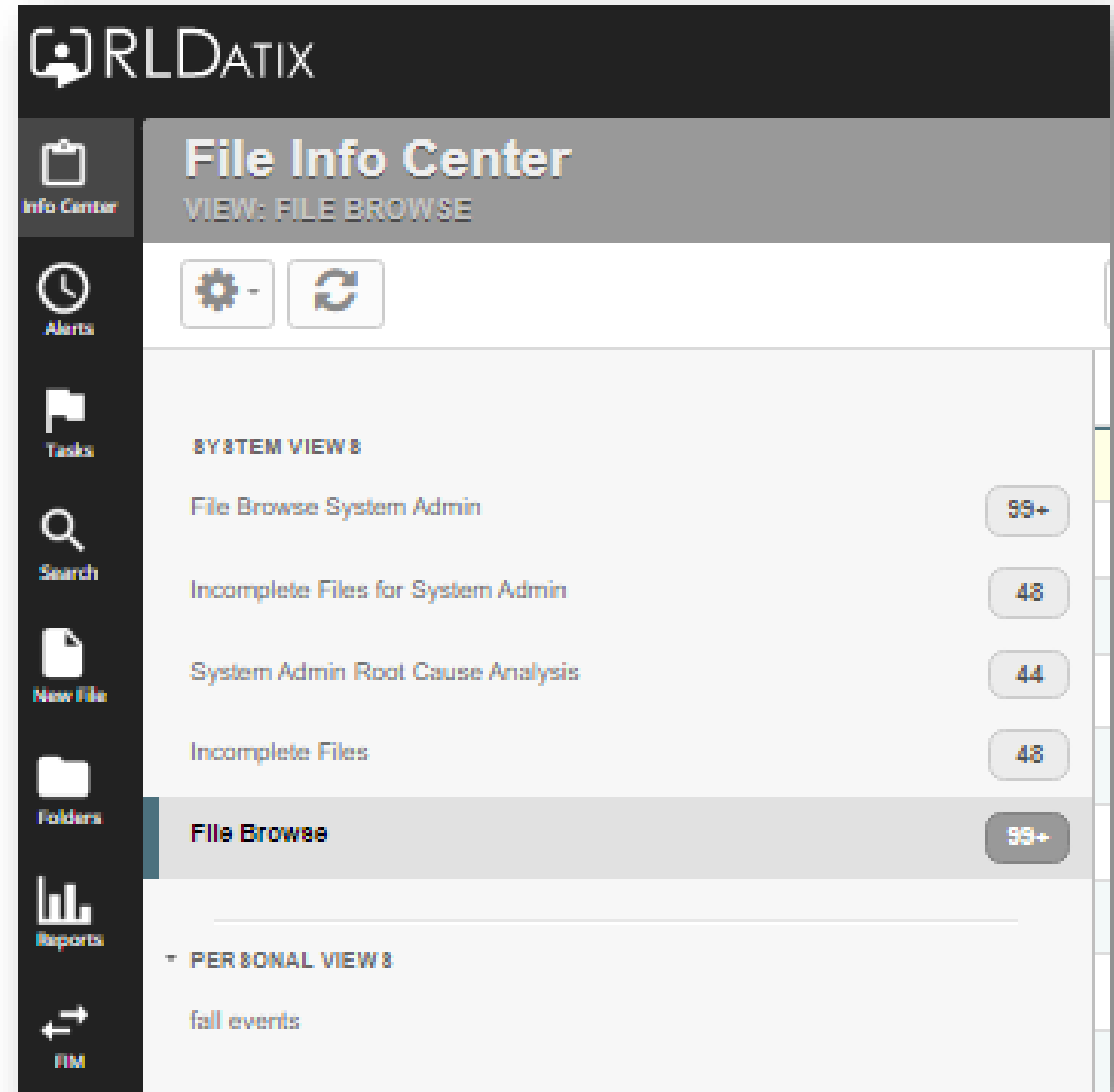
System Views vs. Personal Views

System Views and Personal Views are found in the Info Center

System Views are already set and cannot be changed.

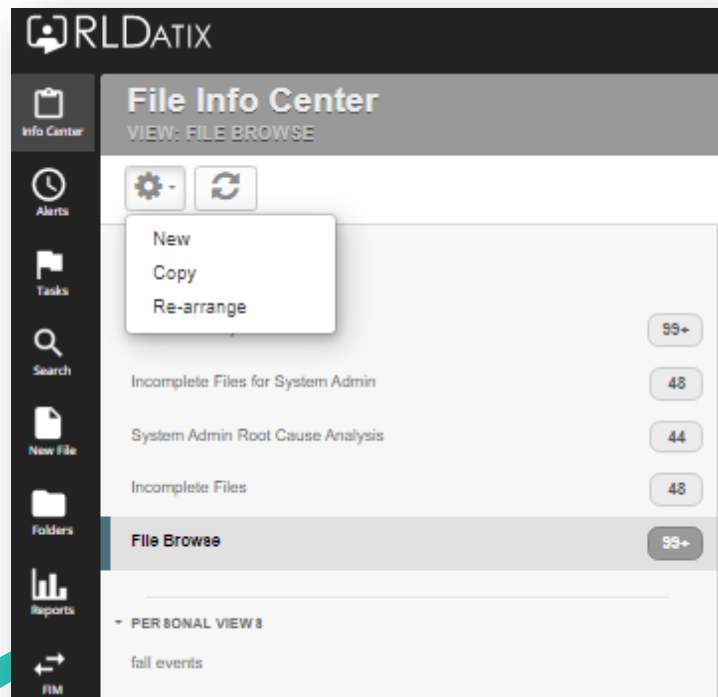
Personal Views are views that you can create specific to the files you would like to see

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

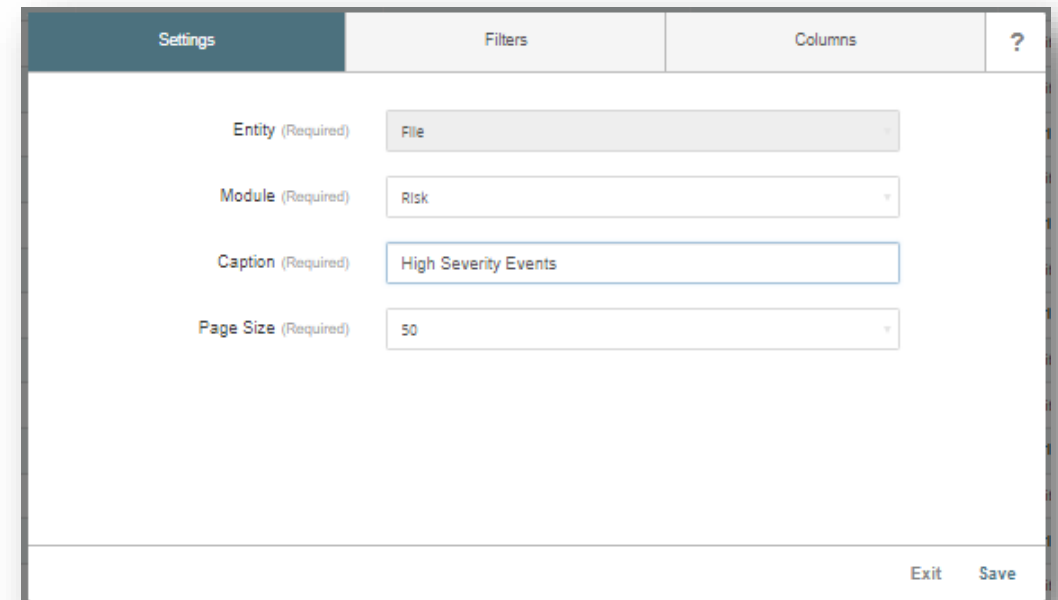


Creating a Personal View

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

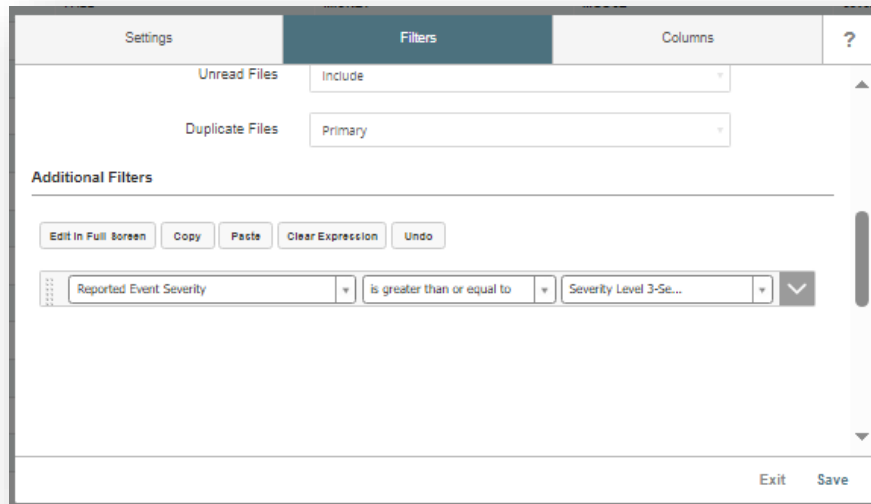


Step 2: In the popup box, make your selections and name your custom view



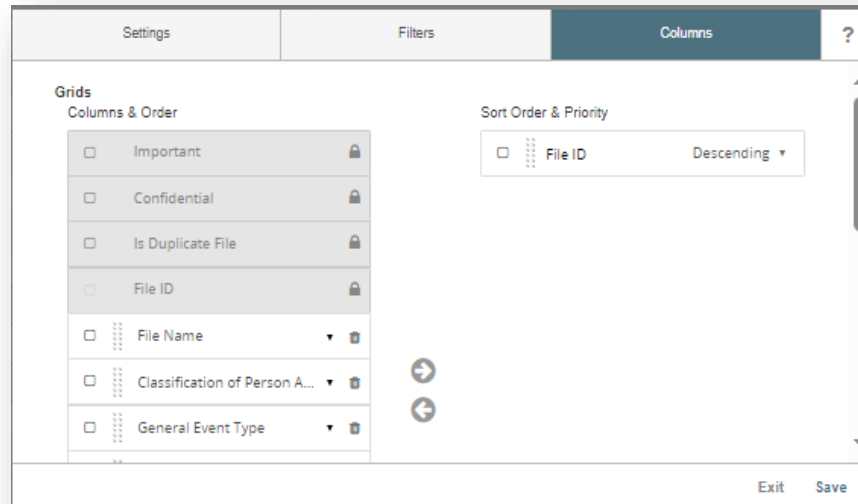
Creating a Personal View – Part 2

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 selected in a window with tabs for 'Settings', 'Filters', 'Columns', and a help icon '?'. The 'Unread Files' dropdown is set to 'Include'. The 'Duplicate Files' dropdown is set to 'Primary'. Under 'Additional Filters', there are buttons for 'Edit in Full Screen', 'Copy', 'Paste', 'Clear Expression', and 'Undo'. A filter expression is entered: 'Reported Event Severity' is greater than or equal to 'Severity Level 3-Se...'. At the bottom right 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 selected in a window with tabs for 'Settings', 'Filters', 'Columns', and a help icon '?'. The 'Grids' section has a 'Columns & Order' list on the left and a 'Sort Order & Priority' section on the right. The 'Columns & Order' list includes 'Important', 'Confidential', 'Is Duplicate File', 'File ID', 'File Name', 'Classification of Person A...', and 'General Event Type'. The 'Sort Order & Priority' section shows 'File ID' sorted 'Descending'. At the bottom right are 'Exit' and 'Save' buttons.

Where do I find
more resources?



More PEER Information

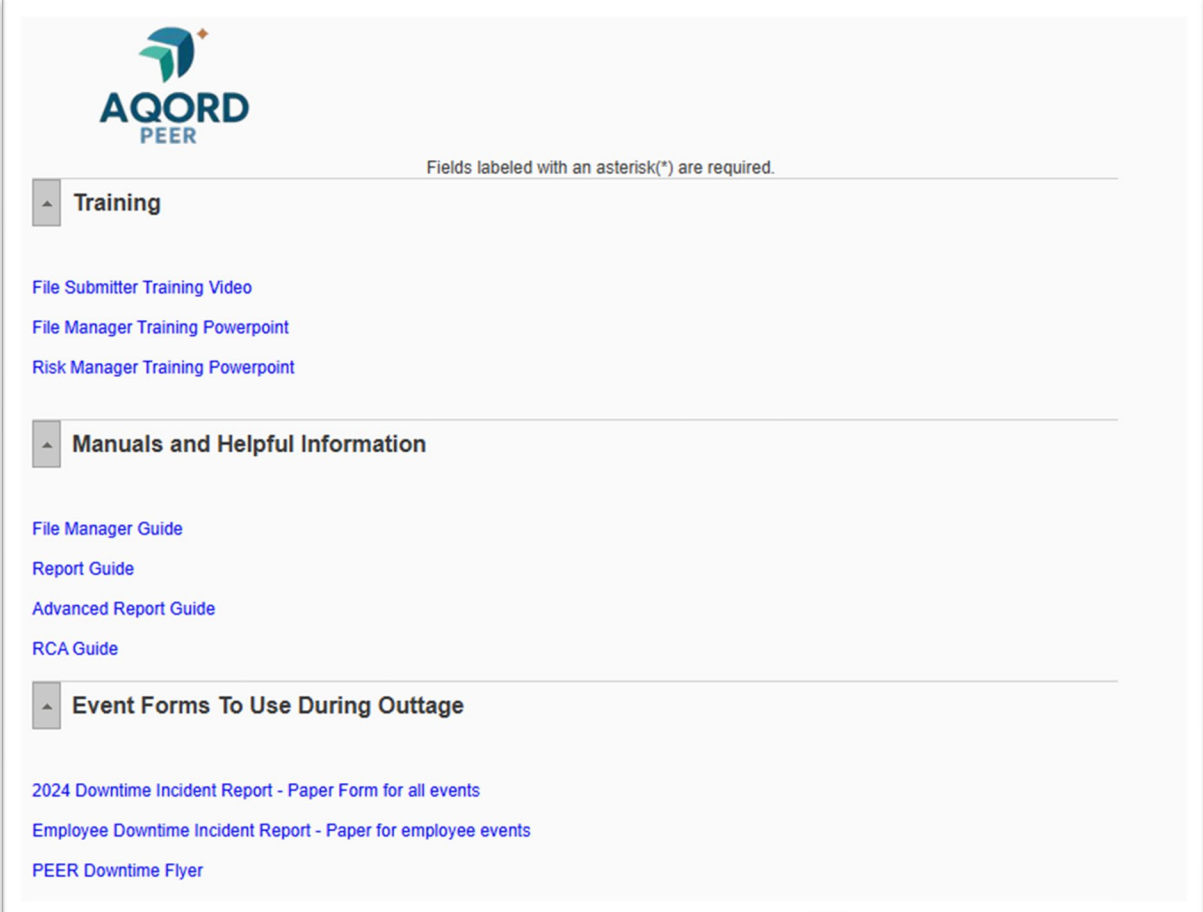
Navigate in PEER to your icon wall

Click on the PEER Resources icon

The PEER Resources event will open.

You can browse through all the help documents available.

Click "Exit" to leave the form when finished.



The screenshot shows the AQORD PEER Resources page. At the top is the AQORD PEER logo. Below the logo is a horizontal line with the text "Fields labeled with an asterisk(*) are required." to the right. The page is divided into three sections, each with a header and a list of links. The first section is "Training" and contains three links: "File Submitter Training Video", "File Manager Training Powerpoint", and "Risk Manager Training Powerpoint". The second section is "Manuals and Helpful Information" and contains four links: "File Manager Guide", "Report Guide", "Advanced Report Guide", and "RCA Guide". The third section is "Event Forms To Use During Outtage" and contains three links: "2024 Downtime Incident Report - Paper Form for all events", "Employee Downtime Incident Report - Paper for employee events", and "PEER Downtime Flyer".

**AQORD
PEER**

Fields labeled with an asterisk(*) are required.

Training

- [File Submitter Training Video](#)
- [File Manager Training Powerpoint](#)
- [Risk Manager Training Powerpoint](#)

Manuals and Helpful Information

- [File Manager Guide](#)
- [Report Guide](#)
- [Advanced Report Guide](#)
- [RCA Guide](#)

Event Forms To Use During Outtage

- [2024 Downtime Incident Report - Paper Form for all events](#)
- [Employee Downtime Incident Report - Paper for employee events](#)
- [PEER Downtime Flyer](#)



Thank you

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