



Shomer Watch[®]

User Guide and Reference

Shomer Insurance Services, LLC
An Alera Group Company

5805 Sepulveda Blvd | Suite 500 | Sherman Oaks, CA 91411

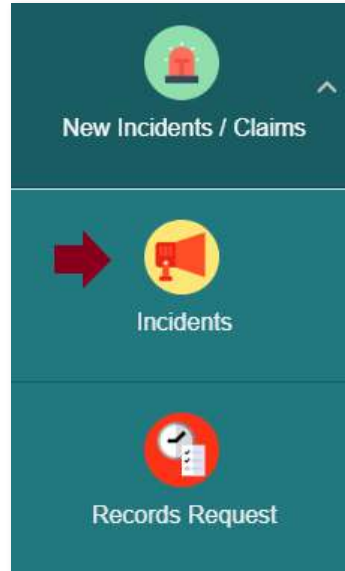
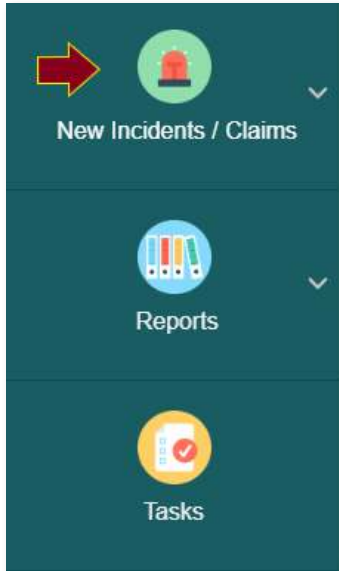
P: 323.934.8160 | ShomerInsurance.com | RM@ShomerInsurance.com

ShomerWatch® Walkthrough Guide

1. Adding a new incident	Page 3 – 5
2. Adding a new records request	Page 6
3. Accessing entered data	Page 7 – 12
a. Pulling reports & drill-down data	Page 7 – 9
b. Sorting Data	Page 10
c. Adding notes and post-incident information	Page 11 – 12
4. Using the task manager	Page 13 – 17
a. Adding a task	Page 13 – 15
b. Completing a task	Page 16 – 17
5. Help Contact	Page 18

Adding a New Incident

Upon logging in to the system, your home page should show a sidebar with the options to add a new claim or incident, view reports, or access the task manager.



To add a new incident, click the “New Incidents/Claims” button. A drop-down will appear with a choice of “Incidents” or “Records Request”. Choose “Incidents”.

The add incident screens should open automatically. You will need to add **at least**:

- Facility/location;
- relationship to facility;
- last name and;
- first name

to move forward to the next page.

If you want to add a second person to the incident, you can click the rust colored “Add +” button in the upper-right corner of the “Persons Involved” tab.

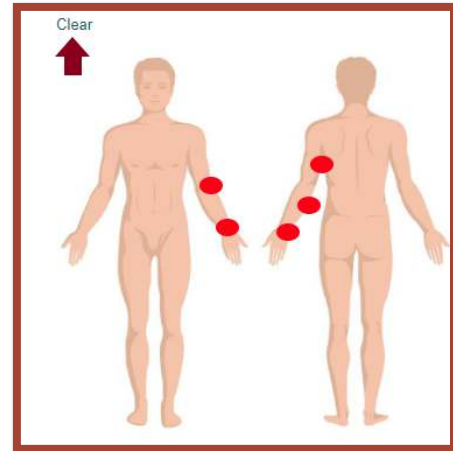
A screenshot of the 'Add New Incident for' form. At the top, it says 'Add New Incident for' and provides instructions: '(* Indicates Required Fields Enter All Dates as: MM/DD/YYYY) Enter All Time as: HH/MM (Military Time)'. Below this are four tabs: '1. Persons Involved' (highlighted in dark teal), '2. Incident Description', '3. Post Incident', and '4. Summary'. Under the 'Persons Involved' tab, there is a 'Location' dropdown menu with 'Select Location' and 'Required' below it. In the upper-right corner of the form, there is a red arrow pointing right and a red button labeled 'Add +'.

You will need to complete the same required fields for the second person. Once that is completed, click "next" to get to the "Incident Description" page.

The Incident Description will need at least the following fields before you will be allowed to continue:

- date;
- location (within facility);
- incident type and;
- equipment involved.

Each category will auto-populate another sub-category with options for injury types and causes. You can and **should** use the model man to describe the injury locations. If you place a marker somewhere incorrect accidentally, use the "clear" button to remove all markers.



Once you have completed the appropriate fields, click the "next" button to move on to the third screen, "Post-Incident". Complete this section as much as possible. In this screen, you can set a reminder task (see section___ for more details) to follow up with the physicians regarding the status of the patient.

A screenshot of a web form titled "Physician Notified?". The form has several input fields: "Doctor Name" with "Dr. Albus", "Date Notified" with "04/03/2022", "Time Notified" with "01:09", "Who Notified The Physician" with "Dr. Minerva", and "Is A Follow-Up Required?" with a dropdown menu showing "Yes", "No", and "Yes" (highlighted in blue). A red arrow points to the "Yes" option in the dropdown. There is also a "Responsible Party Notified?" field at the bottom left and a "Follow Up Date" field at the bottom right.

Once you have entered all the data, move on to the fourth page, which is a review page for all the information. Double-check that everything written is correct. **This information cannot be edited once saved.**

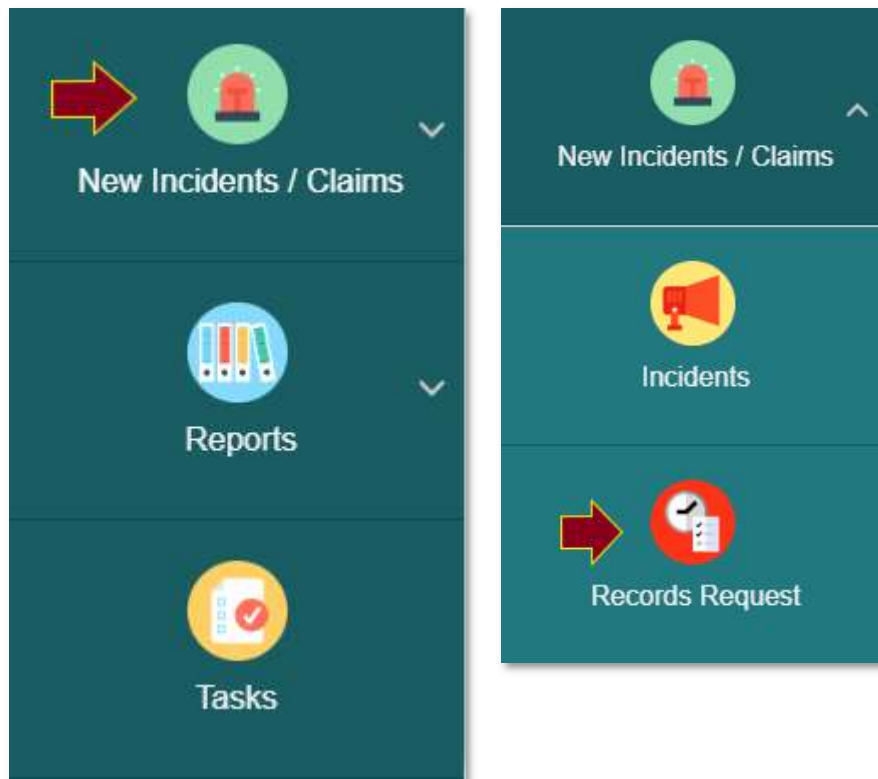
Risk Management: here you will have the option to submit internally, save only, or submit to Shomer as a claim. You can request specific counsel or a call from Shomer Insurance in the window that pops up.

Facility leadership: here you will submit the claim to management/risk management. They will receive a notification of the incident and will be able to review it.

A screenshot of a dialog box titled "Add Recipient Email". It contains a text area for entering email addresses, a note about tendering, and checkboxes for "Requested Council" and "Requested Call From Shomer Insurance Agency". There are also fields for "Name Of The Attorney", "Contact Number", and "Contact Name". At the bottom, there are "Send" and "Close" buttons. A red arrow points to the "Send" button.

You can also add multiple email recipients by separating their email addresses with commas. Anyone who has been previously entered as a risk manager or admin contact will automatically receive a copy.

Add a New Records Request



Using the same menu as adding an incident, select "records request". The records request is all one page, requiring several fields in order to save or submit:

- Name
- Date & time request was received
- Admission & discharge dates of resident
- Date range of request

We highly recommend that you also upload the scanned document to ShomerWatch.

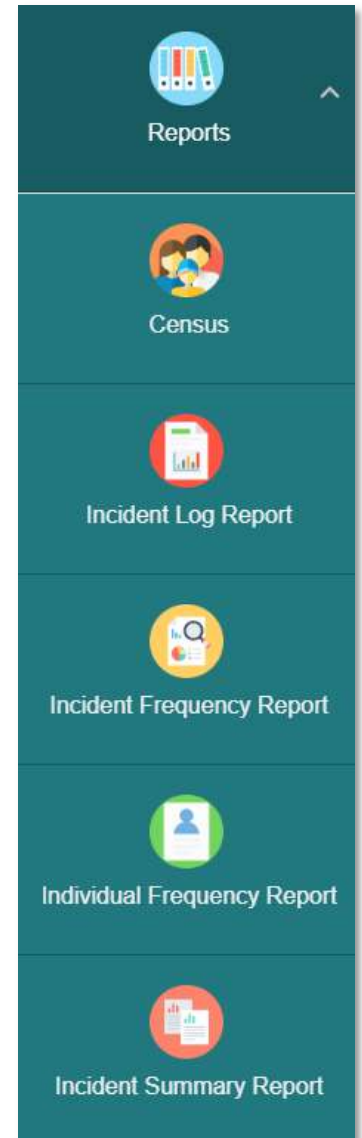
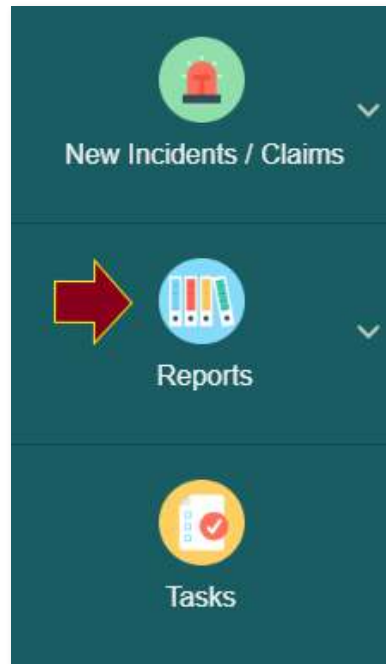
As with adding a new incident, Risk Management will have the ability to submit as a claim, save only, or submit internally. Facility leadership will have the ability to submit to management.

Accessing Entered Data: Pulling Reports & Drilling-Down

There is a variety of reports that can be selected from the second menu option. Each one allows searching and viewing of specific incidents, but all highlight different data based on different parameters.


- **Census** – a list of all persons that have been entered into the system thus far. If desired, an Excel file of all residents/ employees can be submitted to Shomer for upload into the census.
- **Incident Log Report** – shows all incidents. Can be sorted by any of the column headers or filtered using the drop-down menus at the top of the page.
- **Incident Frequency Report** – shows total incidents according to the date of occurrence. Can be filtered using the drop-down menus at the top of the page.
- **Individual Frequency Report** – shows total incidents per person according to the date of occurrence. Can be filtered using the drop-down menus at the top of the page.
- **Incident Summary Report** – shows the number of incidents per day of the week and shift. Soon additional parameters will be added.

In any of these reports, you can click the name of the person to see all incidents relating to that person, or the incident number to see the details of that specific incident.




Accessing Entered Data: Drilling-Down cont.

Click on an individual's name in order to see all the incidents relating to that person. The next screen will show only their information. This can then be sorted further based on location or incident type, and sorted by clicking any of the column titles.

Person Name	Relation Ship To Facility	Incidents for Last 1 To 45 Days	Incidents for Last 46 To 75 Days
Damian Cardenas 	Employee	5	4
Anna Chapman	Resident/patient	1	0
Dovi Jacobs	Resident/patient	0	0
Gary Jensen	Resident/patient	0	1
Mabel Vasquez	Resident/patient	0	0
Luz Garcia-Marquez	Resident/patient	0	0

Clicking any one of the incident numbers will bring you to the details screen for that specific incident.

Incident Type		Location:				
All ▼		All ▼				
Location	Number	Date	Time	Name	Incident Type	
Happy Gardens Retirement Home	415 	04/02/2019		Damian Cardenas	Incident	
Madonna Gardens	180	04/10/2019	14:55	Damian Cardenas	Incident	
Happy Gardens Retirement Home	684	04/05/2019		Damian Cardenas	Incident	
Happy Gardens Retirement Home	736	04/05/2019	12:51	Damian Cardenas	Incident	
Main Office	184	03/01/2019	08:30	Damian Cardenas	Incident	
Main Office	183	03/01/2019	08:15	Damian Cardenas	Incident	

Reports: Sorting Data

In any of the reports, you can sort and filter the data. The Incident Log and Incident Frequency Report allow for sorting by incident type and by location. You can also search for a person by name on the Individual Frequency Report.

In order to sort data, simply click on a column title (one click results in A→Z sorting, two clicks Z→A).

Individual Frequency Report

Relation Ship To Facility: All | Person: All | Location: All

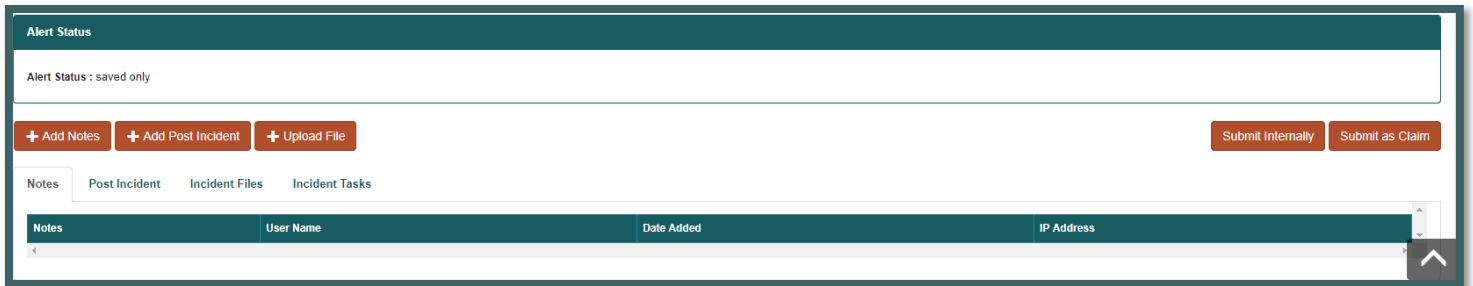
Person Name	Relation Ship To Facility	Incidents for Last 1 To 45 Days	Incidents for Last 46 To 75 Days	Incidents for Last 76 To 135 Days
Trinh Nguyen	Resident/Patient	0	0	0
Tony Jaa	Resident/Patient	0	0	1
sara patrick	Resident/Patient	0	1	0

Location dropdown menu items: All, Happy Gardens Retirement Home, Madonna Gardens, Main Office, Primavera Meadows, Sherman Oaks, Simi Valley Rehabilitation, The Rehab Center of Los Angeles, Van Nuys Retirement

Adding Notes & Post-Incident Information

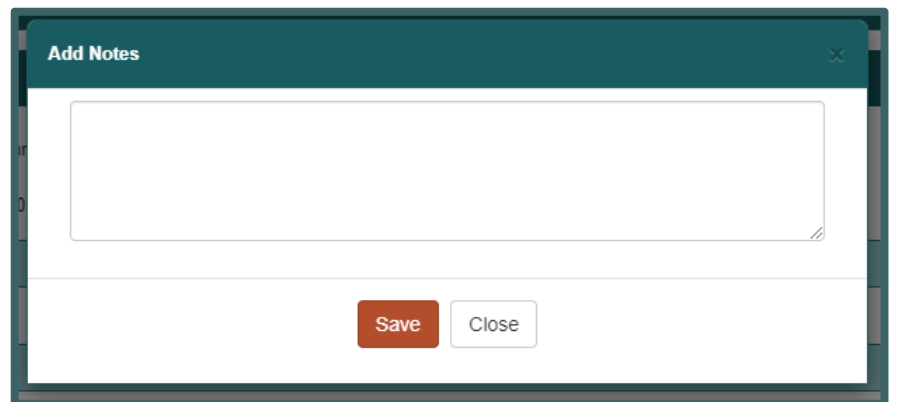
If your company requires a two-step review, this process can be completed in the incident details page (review pages _ & __ if you need help accessing).

At the bottom of the details screen, there are buttons to add notes, post-incident details, and files.



The screenshot shows the top portion of an incident details page. At the top, there is a dark teal header with the text "Alert Status". Below this, a white box contains the text "Alert Status : saved only". Underneath are three red buttons: "+ Add Notes", "+ Add Post Incident", and "+ Upload File". To the right of these buttons are two more red buttons: "Submit Internally" and "Submit as Claim". Below the buttons is a horizontal navigation bar with four tabs: "Notes", "Post Incident", "Incident Files", and "Incident Tasks". At the bottom of the page, a table header is visible with columns for "Notes", "User Name", "Date Added", and "IP Address".

Clicking "Add Notes" will bring a popup window into view where notes can be added in any format. Once these are saved, they will be available to view under the "Notes" tab at the bottom of the incident summary. The notes will be added with the user's name, the date they were added, and the IP address.

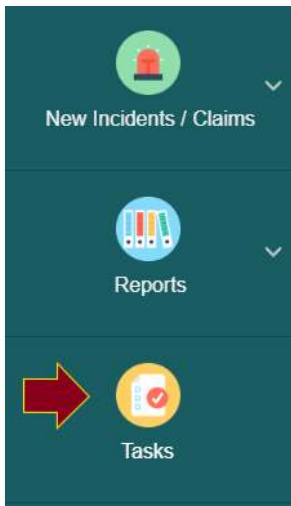


The screenshot shows a popup window titled "Add Notes" with a close button (X) in the top right corner. The main area of the popup is a large, empty white text box for entering notes. At the bottom of the popup, there are two buttons: a red "Save" button and a white "Close" button.

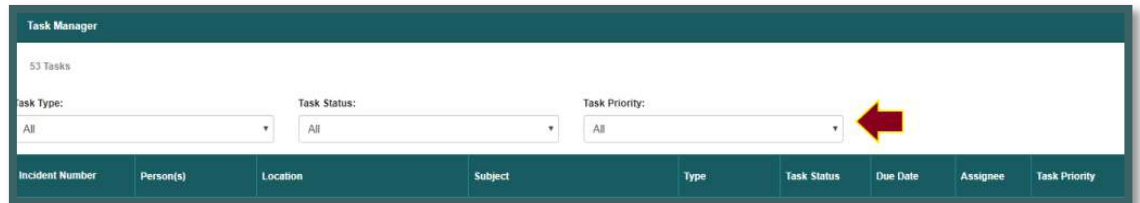
Clicking "Add Post Incident" will bring up another popup window. This will have the same fields as the "Post-Incident" form on the "Add New Incident" section. You will also be able to add a follow-up from this screen. As with the notes, once saved the user's name, date, and IP address will be visible.

Clicking "Upload File" will bring a popup window where a file can be attached. The file will be visible under the "Incident Files" tab, and will be downloadable.

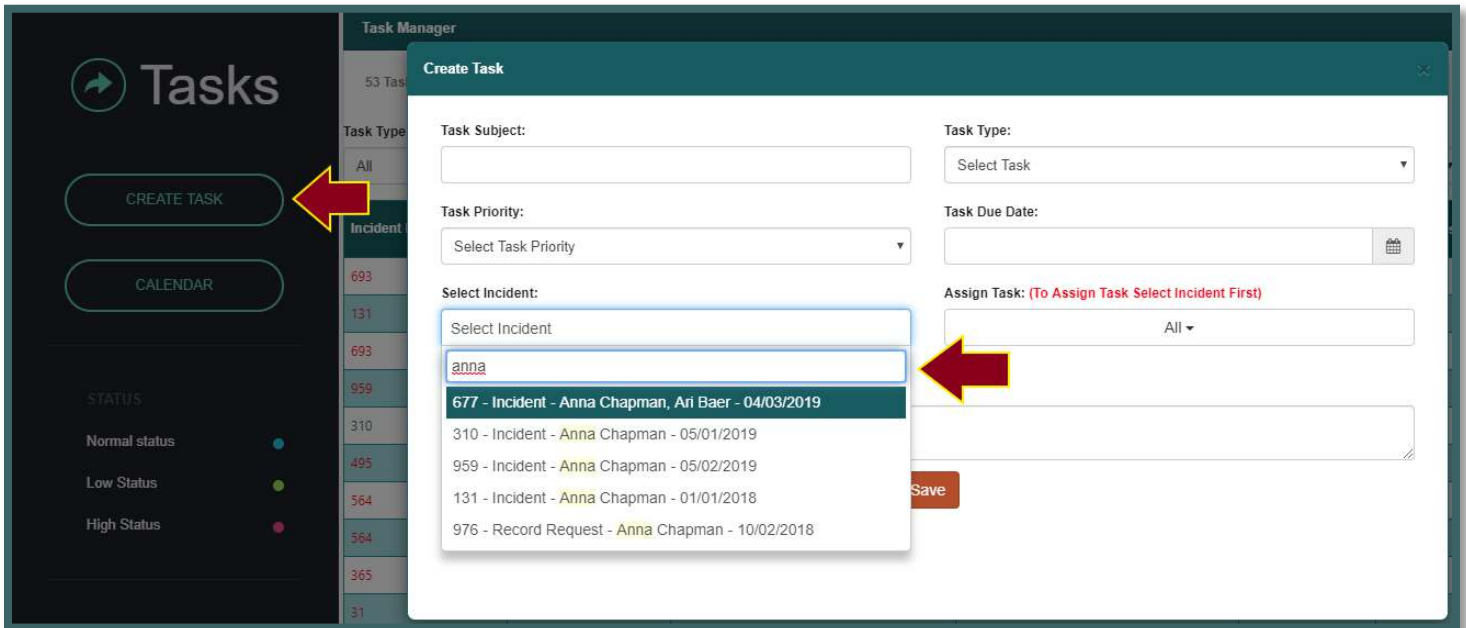
Using the Task Manger: Adding a Task



Click the "Tasks" button to open the task manager. It will display all pending and completed tasks. You can sort these by any of the columns, and filter them by using the drop-down menus at the top.



Click "Create Task" to add a new task from this page. **We suggest having the task subject include the name of the resident/person involved and referencing the incident number if possible/applicable.** For example, "Follow Up with Family of John Smith, #545". You can search for the incident within the Create Task window by the name of the person.



Once you select the person, their data will auto-populate in the Create Task window.

From here, you can assign the task to another user(s), if necessary. Assign the due date. This task will then appear on the calendar, on the Task module homepage, and the person assigned the task will receive notification in their email and upon login.

Create Task

First Name: Anna Last Name: Chapman
Age: 64 Sex: Female
Date Of Birth: 11/01/1953 Room: 152
Admission Date: 08/01/2018

First Name: Ari Last Name: Baer
Age: 30 Sex: Male
Date Of Birth: 03/15/1988 Room: 300
Admission Date: 01/01/2018

Type 1: Person To Person Type 2: Combat – Patient & Patient
Injury Type: Possible Fracture Location: Patio/Smoking Area
Date: 04/03/2019 Time: 10:19:00

Task Subject: Follow up with Ari Baer family member Task Type: Follow up Task

Task Priority: Normal Task Due Date: 06/13/2019

Select Incident: 677 - Incident - Anna Chapman, Ari Baer - 04/03/2019 Assign Task: (To Assign Task Select Incident First) Gilbert, Alvarez

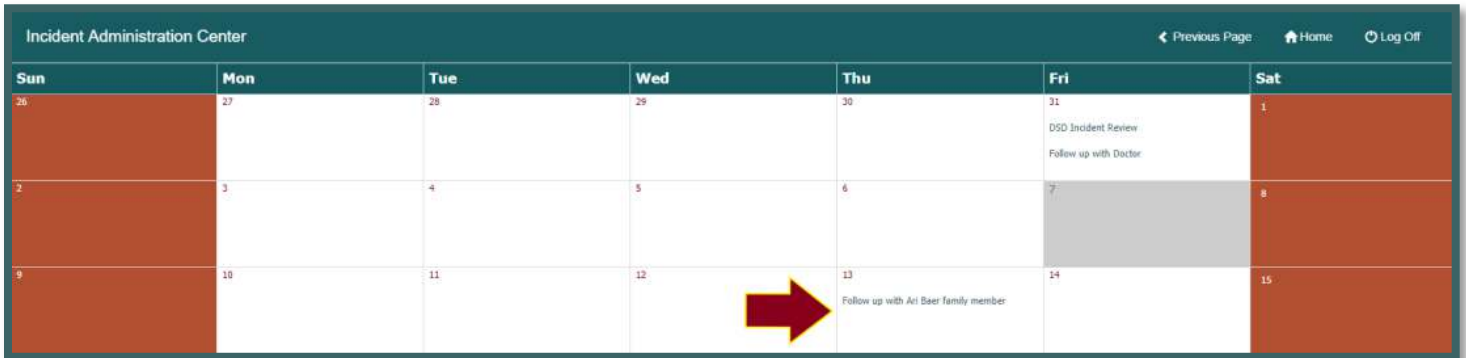
Task Details:
Ari Baer's family have expressed concerns about his well being after fall/combat. Follow up to address concerns.

Save

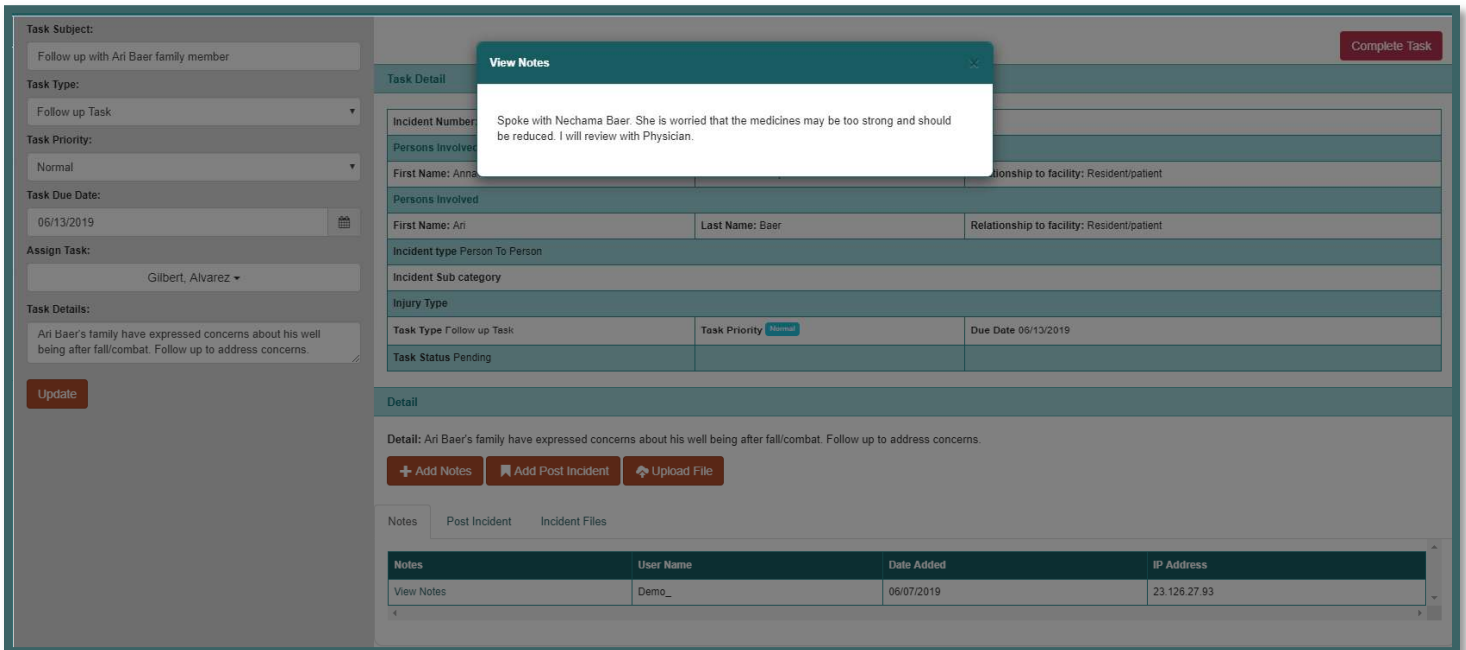
Using the Task Manger: Completing a Task

Any tasks on the calendar are clickable and can be opened from that screen. Any tasks that appear in red are overdue.

Incident reviews that are assigned from an incident will also appear here to be completed.



Clicking a task subject line will open the full detail view of the task. In this screen, you can add notes or files and mark the task as completed.





Contact Us for Help!

If you have any questions, please reach out to:
Anna Chapman
323-648-7486
Anna@ShomerInsurance.com