Shomer Watch©

User Guide and Reference

Shomer Insurance Services, LLC
An Alera Group Company

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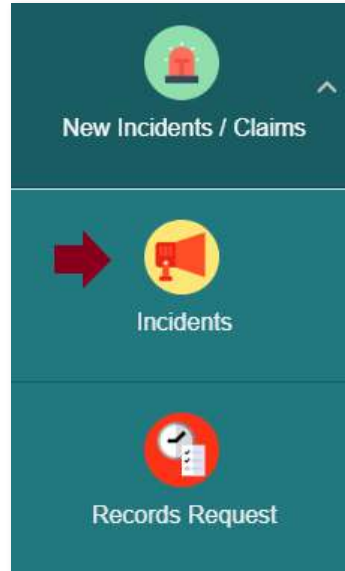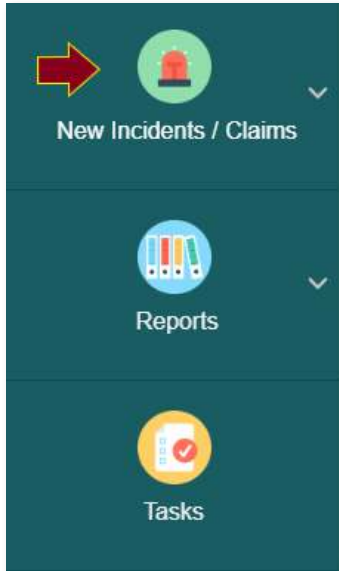
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ShomerWatch© Walkthrough Guide

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.

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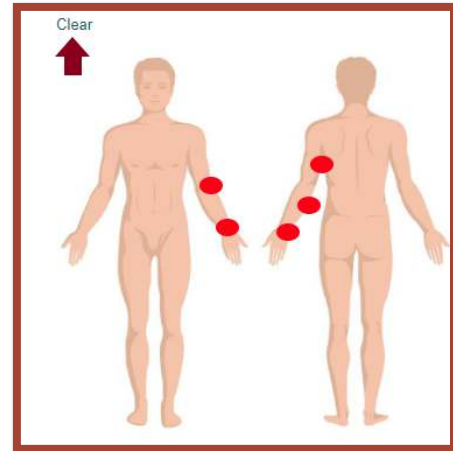
Once you have completed the appropriate fields, click the "next" button to move on to the third screen, "Post-Incident".
Complete this section as much as possible. In this screen, you can set a reminder task (see section___ for more details) to follow up with the physicians regarding the status of the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

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.

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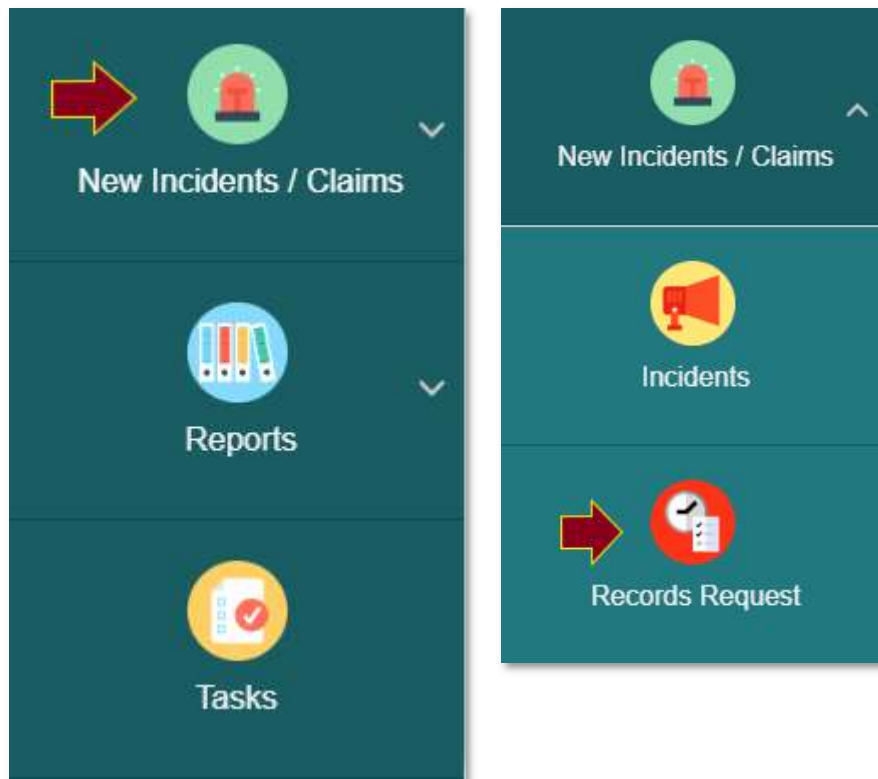
Using the same menu as adding an incident, select "records request". The records request is all one page, requiring several fields in order to save or submit:

- 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.
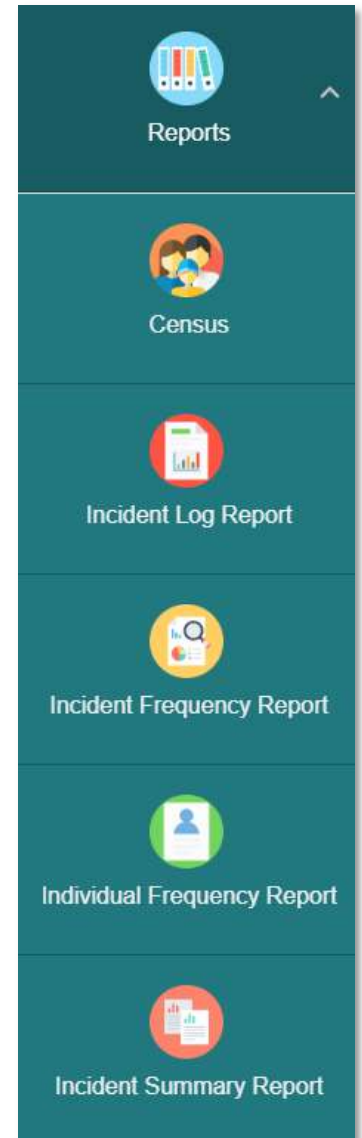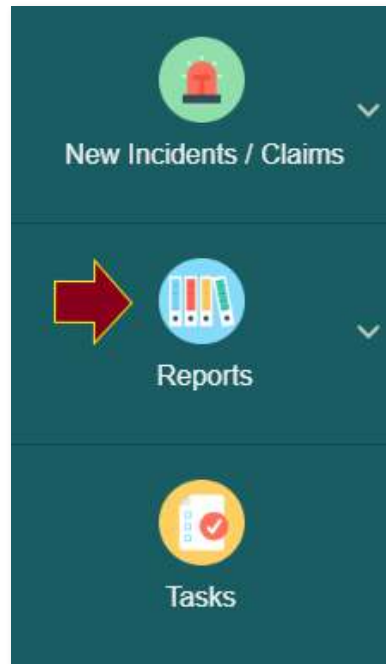
Accessing Entered Data: Drilling-Down cont.

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

All ▾

Location:

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).

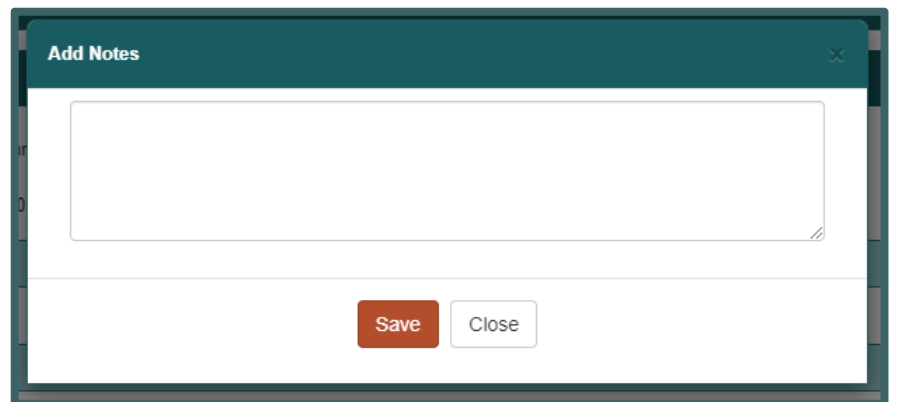| Individual Frequency Report					
Relation Ship To Facility		**Person**		**Location:**	
All ▾		All ▾		All ▾	
				All	
				Happy Gardens Retirement Home	
				Madonna Gardens	
				Main Office	
Person Name ▾	**Relation Ship To Facility**	**Incidents for Last 1 To 45 Days**	**Incidents for Last 46 To 75 Days**	Primavera Meadows / Sherman Oaks / Simi Valley Rehabilitation / The Rehab Center of Los Angeles / Van Nuys Retirement	**135 Days**
Trinh Nguyen	Resident/Patient	0	0	0	
Tony Jaa	Resident/Patient	0	0	1	
sara patrick	Resident/Patient	0	1	0	0
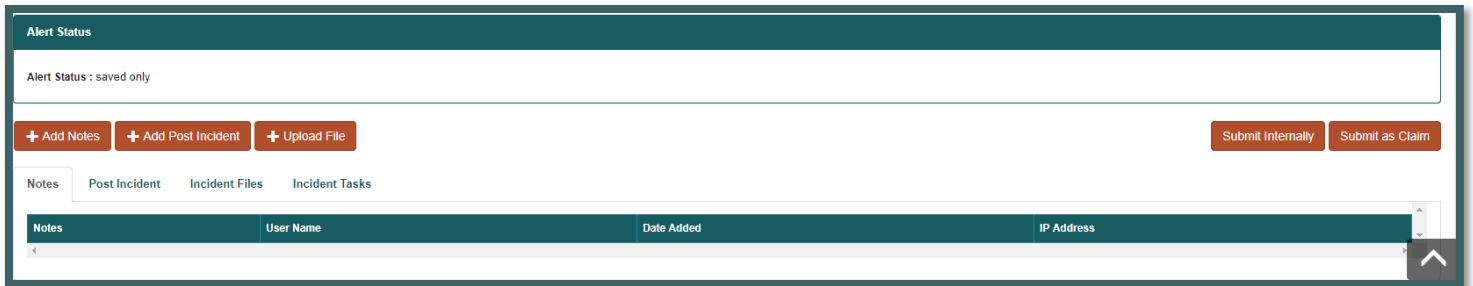
Adding Notes & Post-Incident Information

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.

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.

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
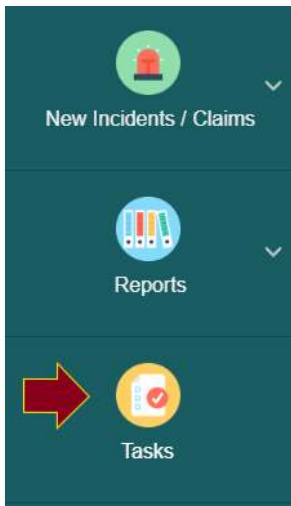
Click the "Tasks" button to open the task manager. It will display all pending and completed tasks. You can sort these by any of the columns, and filter them by using the drop-down menus at the top.
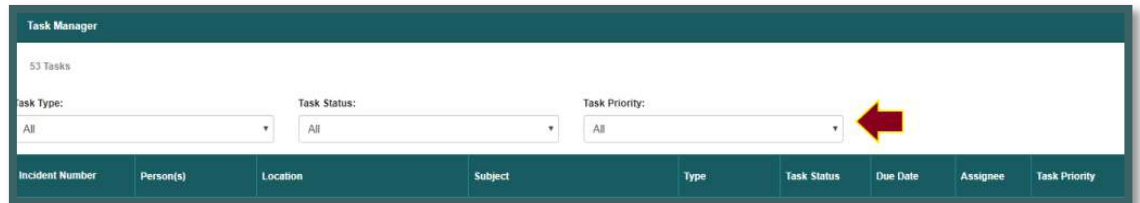
Click "Create Task" to add a new task from this page. **We suggest having the task subject include the name of the resident/person involved and referencing the incident number if possible/applicable**. For example, "Follow Up with Family of John Smith, #545". You can search for the incident within the Create Task window by the name of the person.
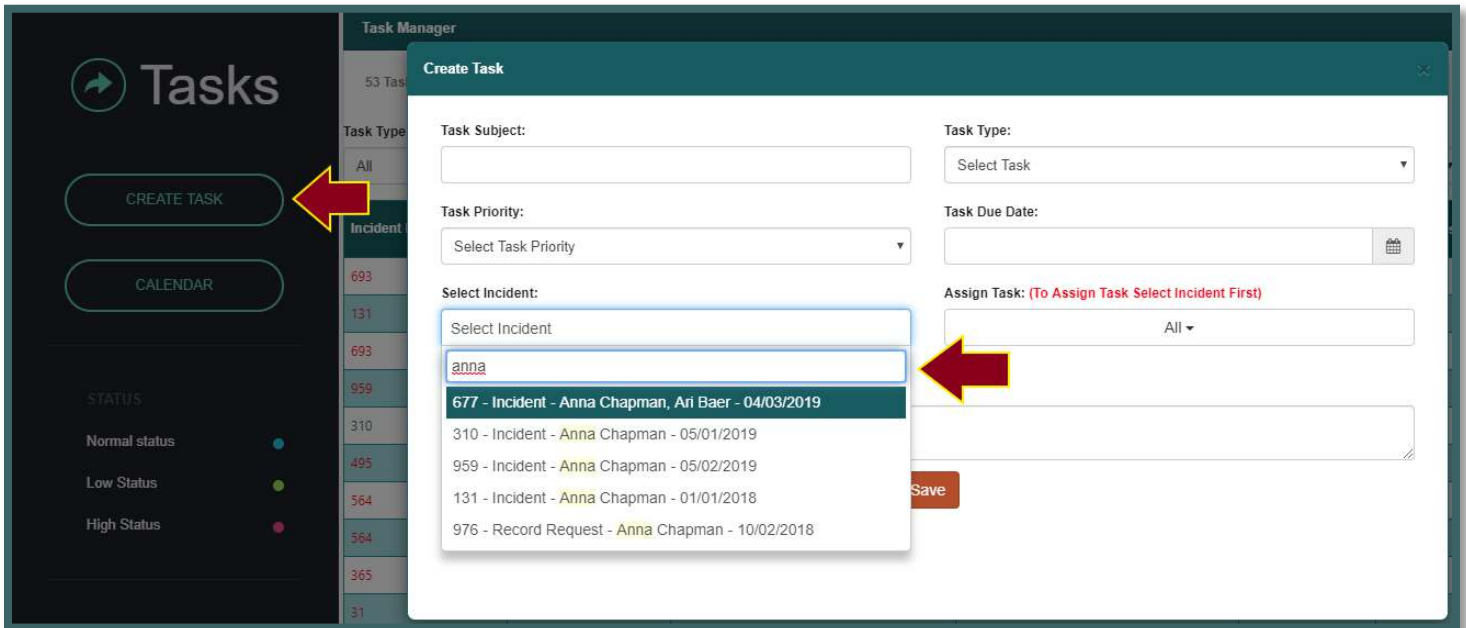
Once you select the person, their data will auto-populate in the Create Task window.

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: Task Type:

Follow up with Ari Baer family member   Follow up Task

Task Priority: Task Due Date:

Normal   06/13/2019

Select Incident: Assign Task: (To Assign Task Select Incident First)

677 - Incident - Anna Chapman, Ari Baer - 04/03/2019   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.
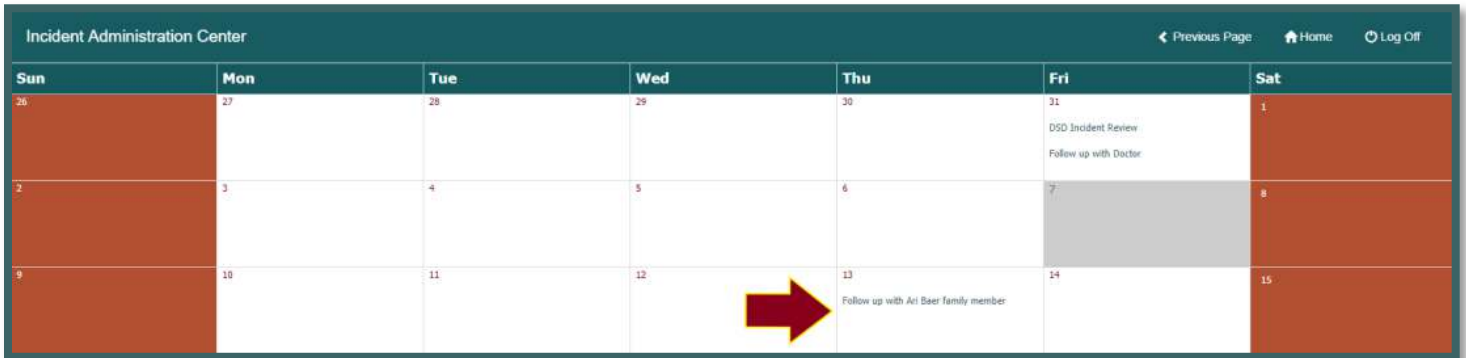
Clicking a task subject line will open the full detail view of the task. In this screen, you can add notes or files and mark the task as completed.
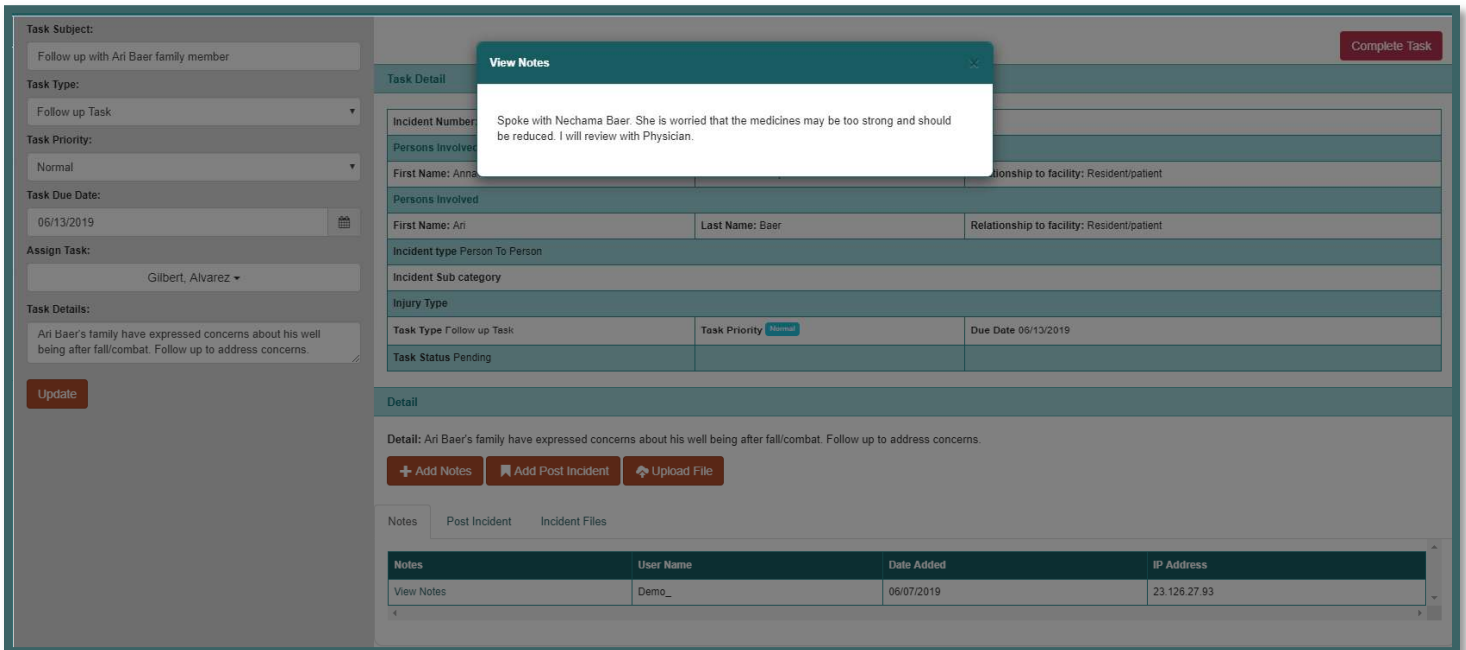
Contact Us for Help!

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