

COMPREHENSIVE DESK-BASED RISK MANAGEMENT ASSESSMENT

P E N D U L U M
RISK MANAGEMENT SERVICES

For these unprecedented times, Pendulum is providing a new service based on our on-location Professional Liability Risk Assessment. The Comprehensive Desk-based Risk Management Assessment is now available!

Pendulum's desk-based assessment is an effective tool utilized by insurance underwriters, agents, brokers, and providers to make proactive and informed decisions regarding risk and defensibility. It can also be used as a significant value-added service as well as a renewal incentive. For senior housing communities, such as skilled nursing facilities, assisted living facilities, and continuing care retirement communities, it is an effective way to evaluate and identify areas of risk.

For this desk-based assessment, a Pendulum risk control consultant works with the facility in scheduling phone interviews with the Administrator or Executive Director and other key employees as determined (Director of Nursing, Wellness Director, Human Resources Director, Maintenance Director, etc.). These calls can be scheduled at different times for the individual team members.

With a Business Associate Agreement signed by Pendulum, the facility provides documents as requested by the risk control consultant prior to the scheduled calls. These documents include, but are not limited to:

- Facility protocols
- Policies and procedures
- Survey data
- Incident data
- Quality Assurance/Performance Improvement forms
- Loss run data
- Claim documents
- Orientation and training records
- In-service attendance records

The risk control consultant will also review resident records with the Director of Nursing through "read-only" access to the electronic medical record (for assisted living, a review of records will be conducted with the Wellness Director). If an



electronic medical record system is not in place, another process for review will be determined.

A virtual tour is also scheduled with the remote risk control consultant, utilizing FaceTime, Google Duo, or other application.

The assessment includes an optional self-assessment tool sent to the facility with the introduction/set-up letter from Pendulum to assist the facility in self-evaluating other areas of risk that should be considered within the risk management program. Any questions the self-assessment brings up can be asked of the consultant during the phone interviews.

Within 10 business days of the assessment, the client and insured will receive a written report that includes all of the consultant's findings. In addition, valuable risk control recommendations are provided. The client can elect for the insured to respond to these recommendations and have Pendulum evaluate their response and provide additional recommendations or information if necessary. The insured will also receive access to an online risk management resource center where they can find tools to address recommendations.

Call Pendulum today!