



AUTOMATED RISK MANAGEMENT LOSS REPORTS

INSTRUCTIONS

The system of reporting losses of District property resulting from theft, vandalism, accidents, weather, etc., is now automated through the District's mainframe computer system (the LOSS system). This document discusses, step-by-step, how to create, review and approve loss reports online.

An important feature of the system is the interface of the LOSS system with the CRMS (FAST) database. Now you can link any CRMS item to your LOSS report, and all pertinent information of that item will be automatically available on the LOSS report.

Please remember that all losses should be reported to the North East ISD Police immediately @ 655-6859.

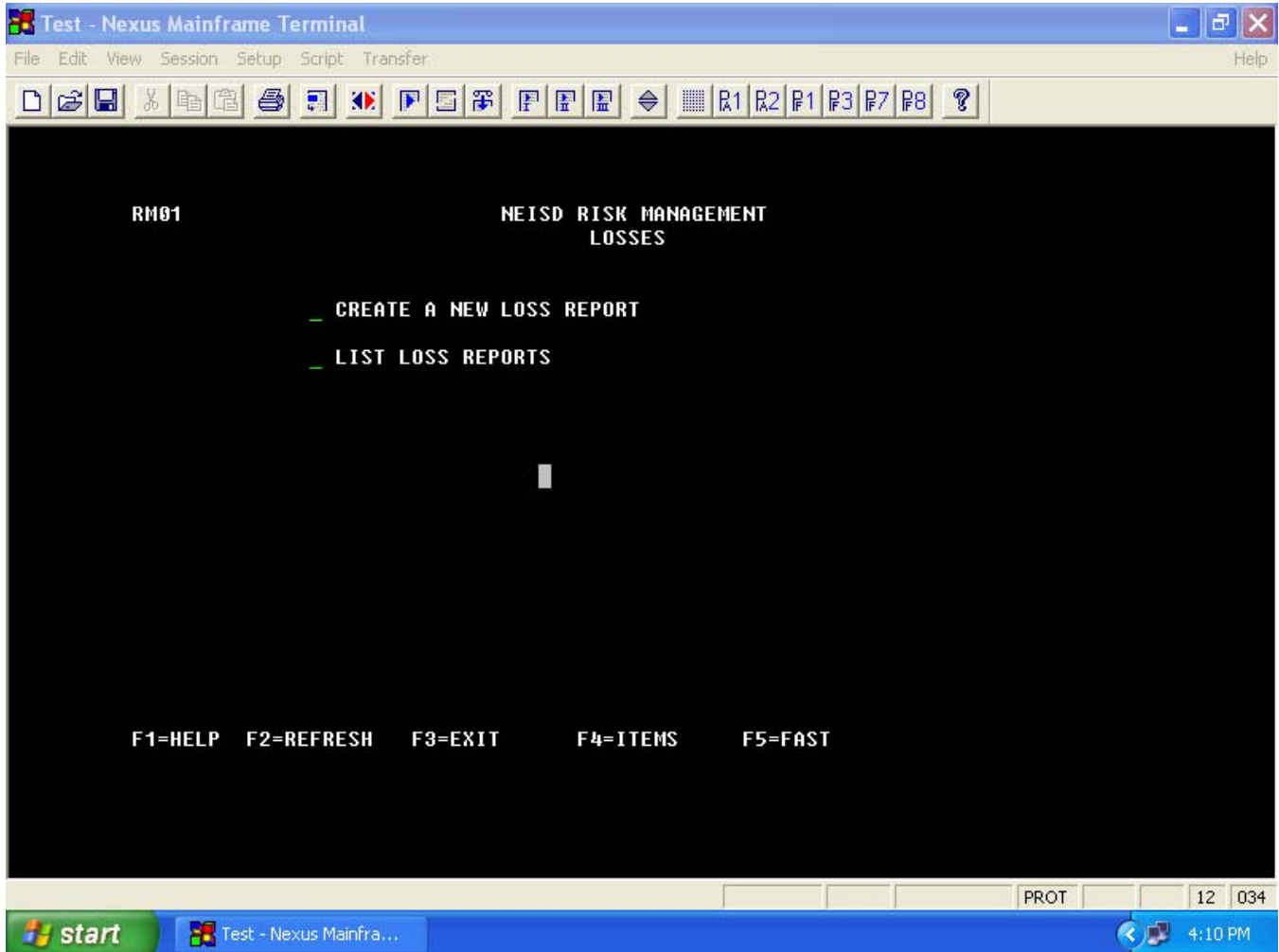
If you have any questions regarding the LOSS system, please contact Mario Ward, Assistant Director of Risk Management, @ 407-0187, or mward1@neisd.net.

AUTOMATED RISK MANAGEMENT LOSS REPORTS

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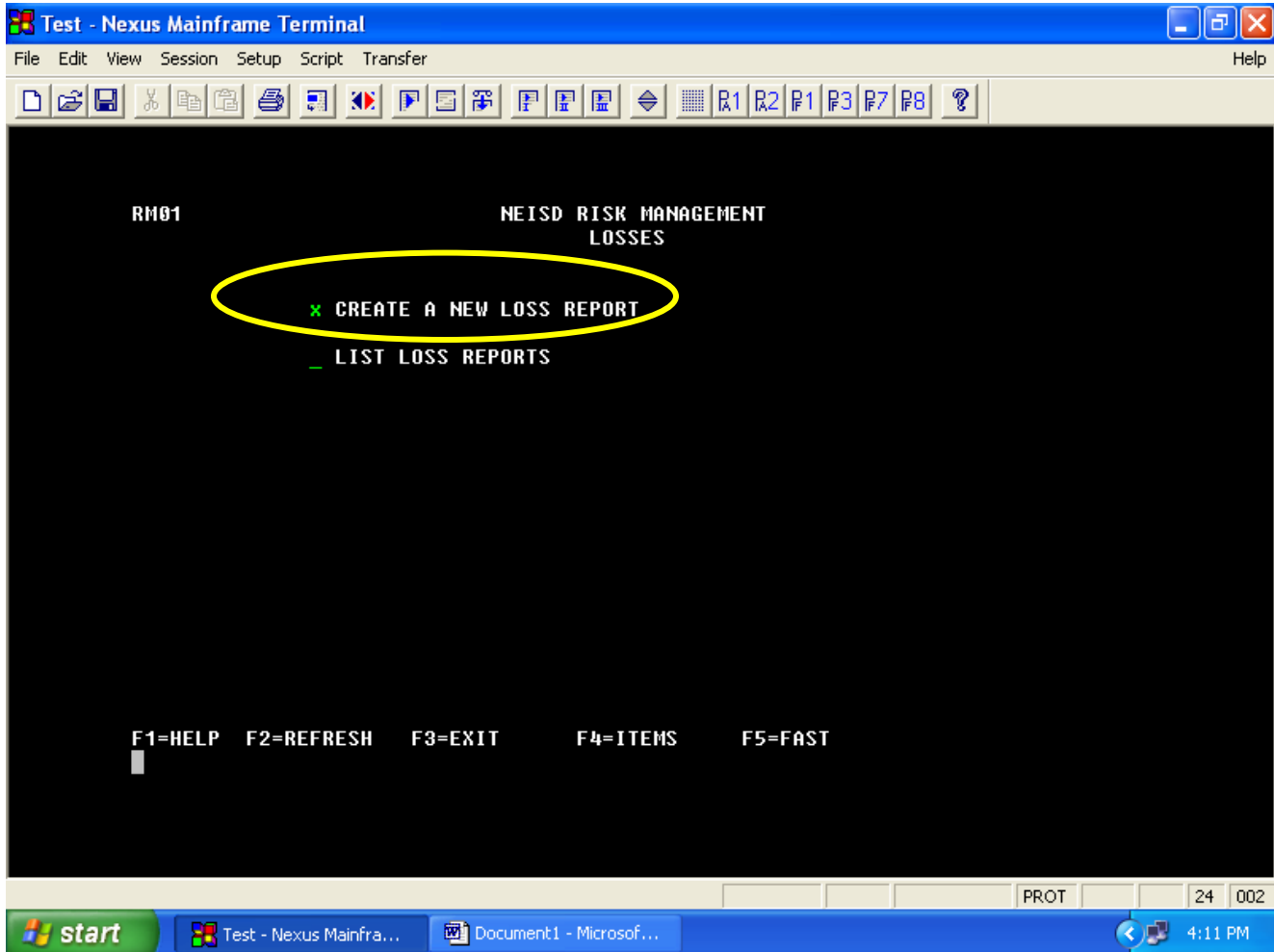
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CREATING A NEW LOSS REPORT



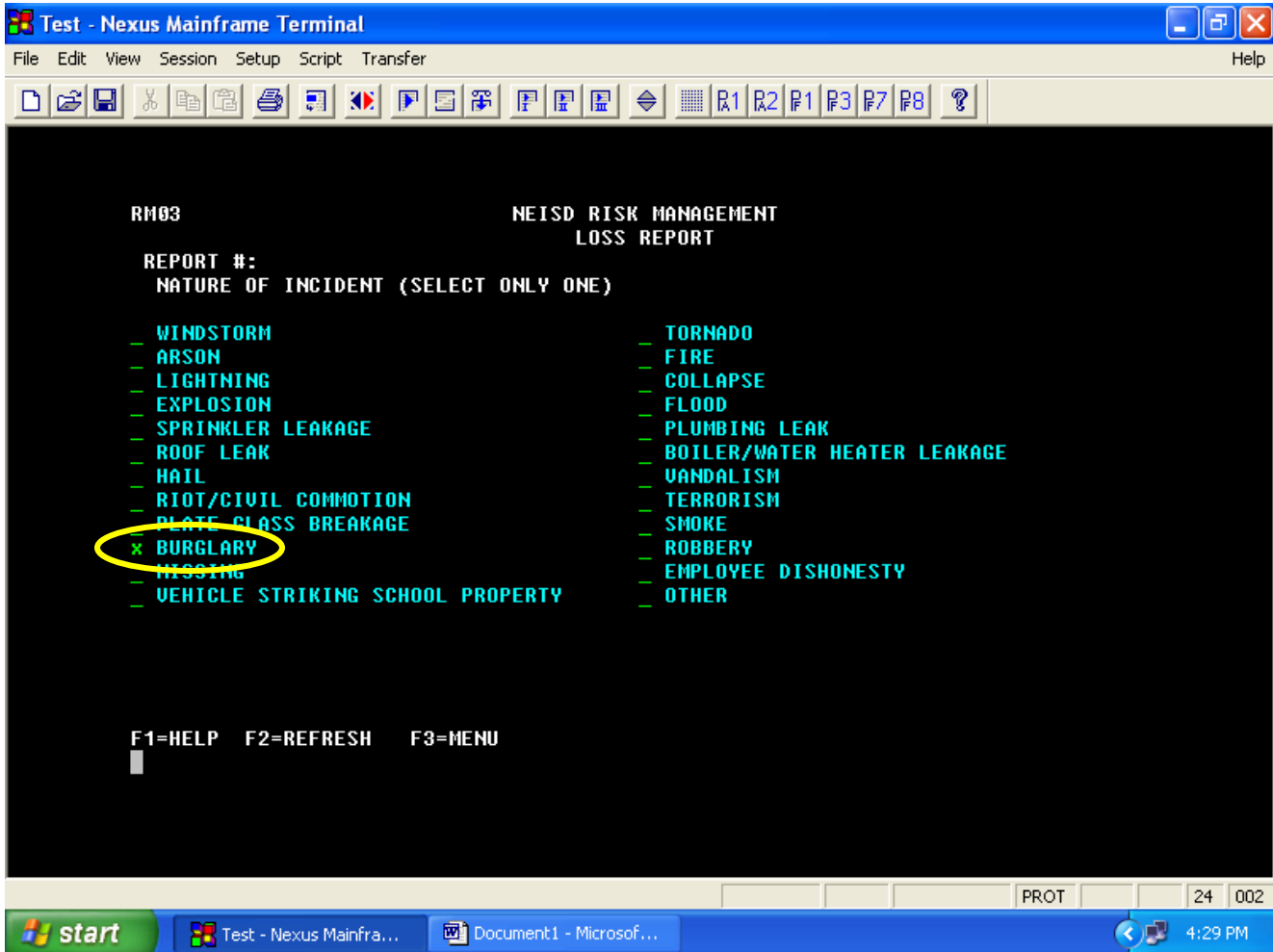
To access the online LOSS report system, sign on to the mainframe, then type “**LOSS**” (no quotes) and press **<Enter>**. The main LOSS screen (above) will appear.

CREATING A NEW LOSS REPORT



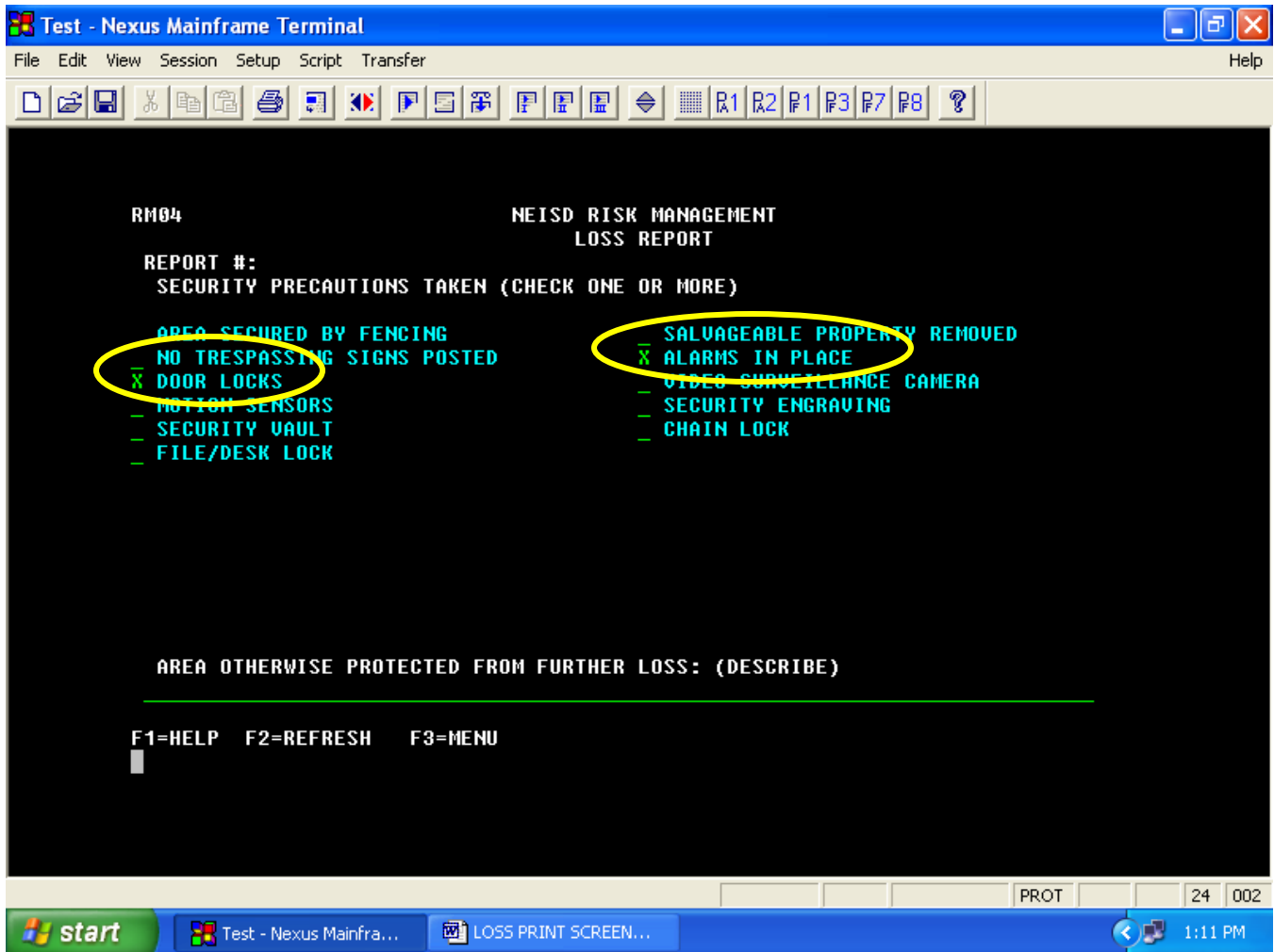
To create a new loss report, place an “X” next to “Create a New Loss Report” and press <Enter>.

CREATING A NEW LOSS REPORT



At this point, select the ONE nature of incident that best describes the current loss being reported. The definitions for these can be found by pressing <F1>; they are also available in *Appendix A* in the back of this document. Place an "X" next to the appropriate item and press <Enter>.

CREATING A NEW LOSS REPORT



With an “X”, select one or multiple security precautions in place at the time the loss was discovered. If none were present, leave this page blank. If there were security precautions other than, or in addition to, the available list, enter a description on the line provided at the bottom of the screen. Press **<Enter>** when finished.

CREATING A NEW LOSS REPORT

```
RM02                                NEISD RISK MANAGEMENT
                                LOSS REPORT
REPORT #: _____ SITE: █
ADDRESS: _____
DATE OF LOSS: 00/00/00 TIME OF LOSS: __:__ BUDGET MANAGER REVIEW: __
NATURE: BURGLARY
PRECAUTIONS:

                                ALARMS IN PLACE

DOOR LOCKS

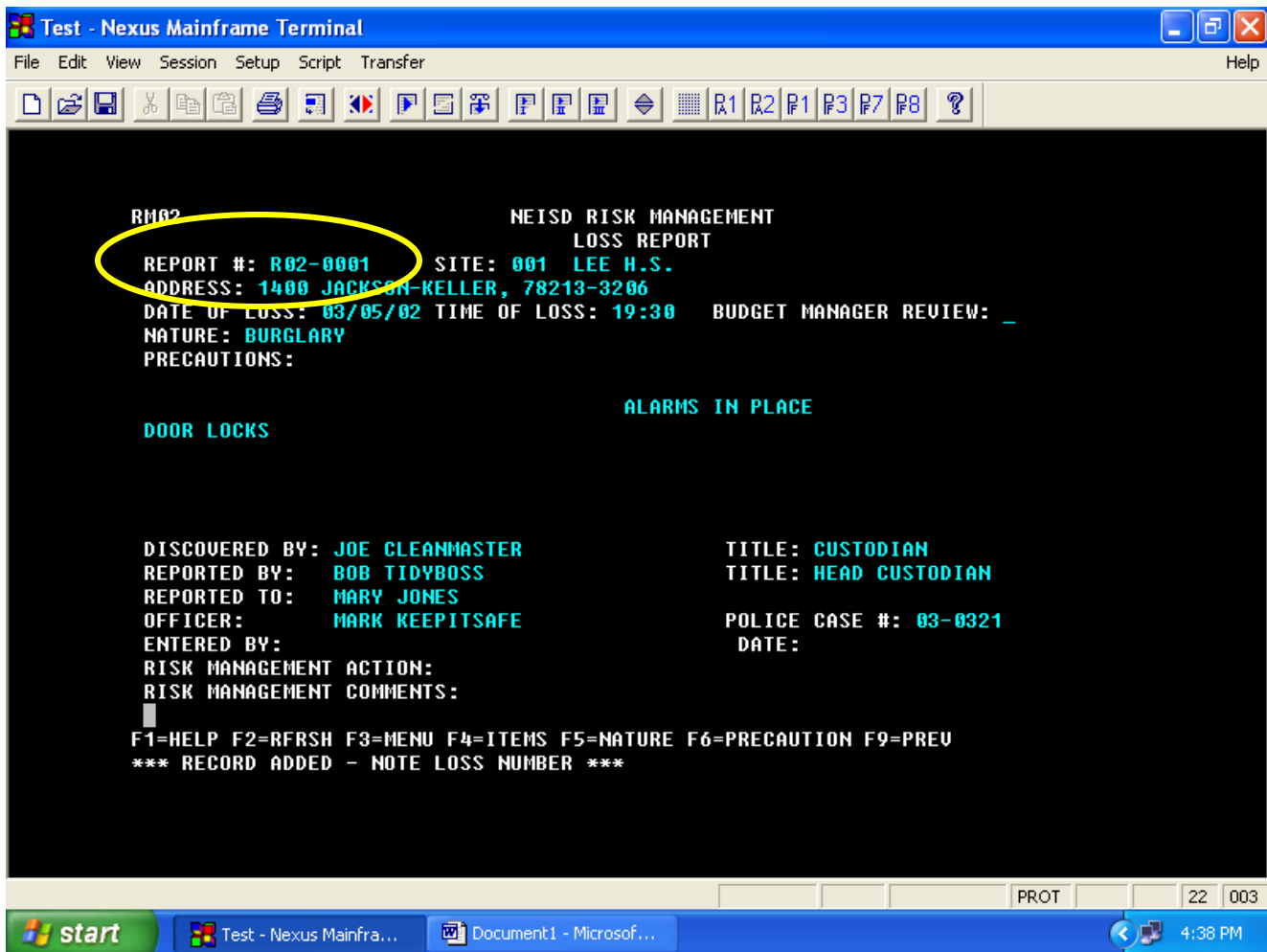
DISCOVERED BY: _____ TITLE: _____
REPORTED BY: _____ TITLE: _____
REPORTED TO: _____
OFFICER: _____ POLICE CASE #: _____
ENTERED BY: _____ DATE: _____
RISK MANAGEMENT ACTION:
RISK MANAGEMENT COMMENTS:

F1=HELP F2=RFRSH F3=MENU F4=ITEMS F5=NATURE F6=PRECAUTION F9=PREV
FULL DESCRIPTION IS NOT ENTERED HERE; IT IS ON THE POLICE REPORT
```

This is the main page of the report. It brings in the nature (*burglary*) and the precautions (*alarms, door locks*) from the previous two screens. Should these items need to be corrected, press <F5> or <F6>, as noted on the bottom of the screen.

Now fill in the fields in green. The “Site” should default to your campus (or org) number. You must type in the address of the incident, time, names and titles of the people involved, and the police officer name and assigned case #. Important: In many instances (burglary, vandalism, etc), the Risk Management Department cannot process the claim unless the police case # is included!

To determine whose name to include where, ask yourself these questions: *Discovered By:* “Who found it?”; *Reported By:* “Who brought it to an administrator’s attention?” *Reported To:* “Which administrator was notified?” “Entered By” will default to the user who is currently logged in and filling out the report.

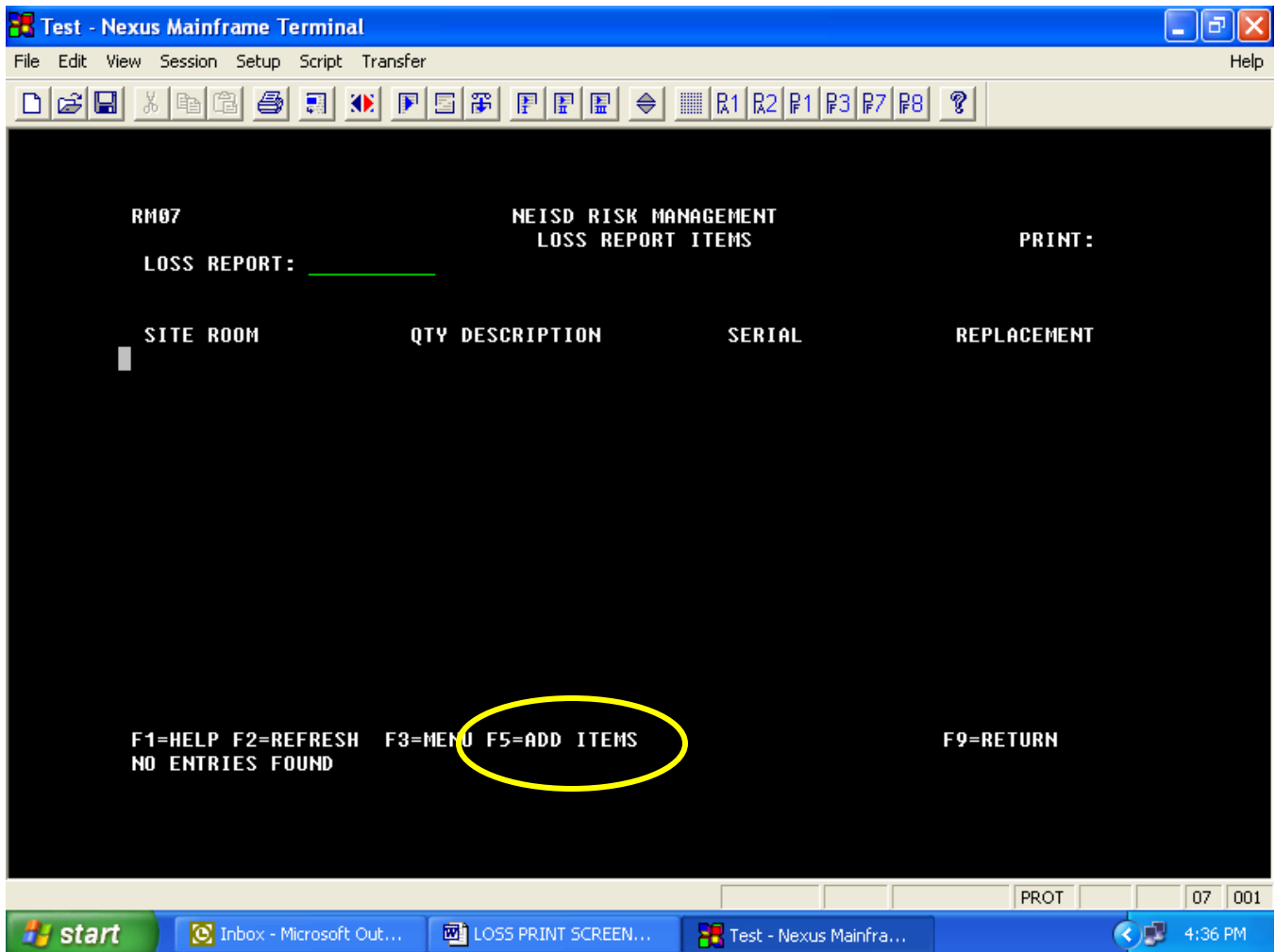


Press **<Enter>** to complete the report. Here is an example of a completed LOSS report screen. Note the assigned LOSS report number for your records.

If the loss involves property that is currently tracked on CRMS, press **<F4>** to attach those items to the report.

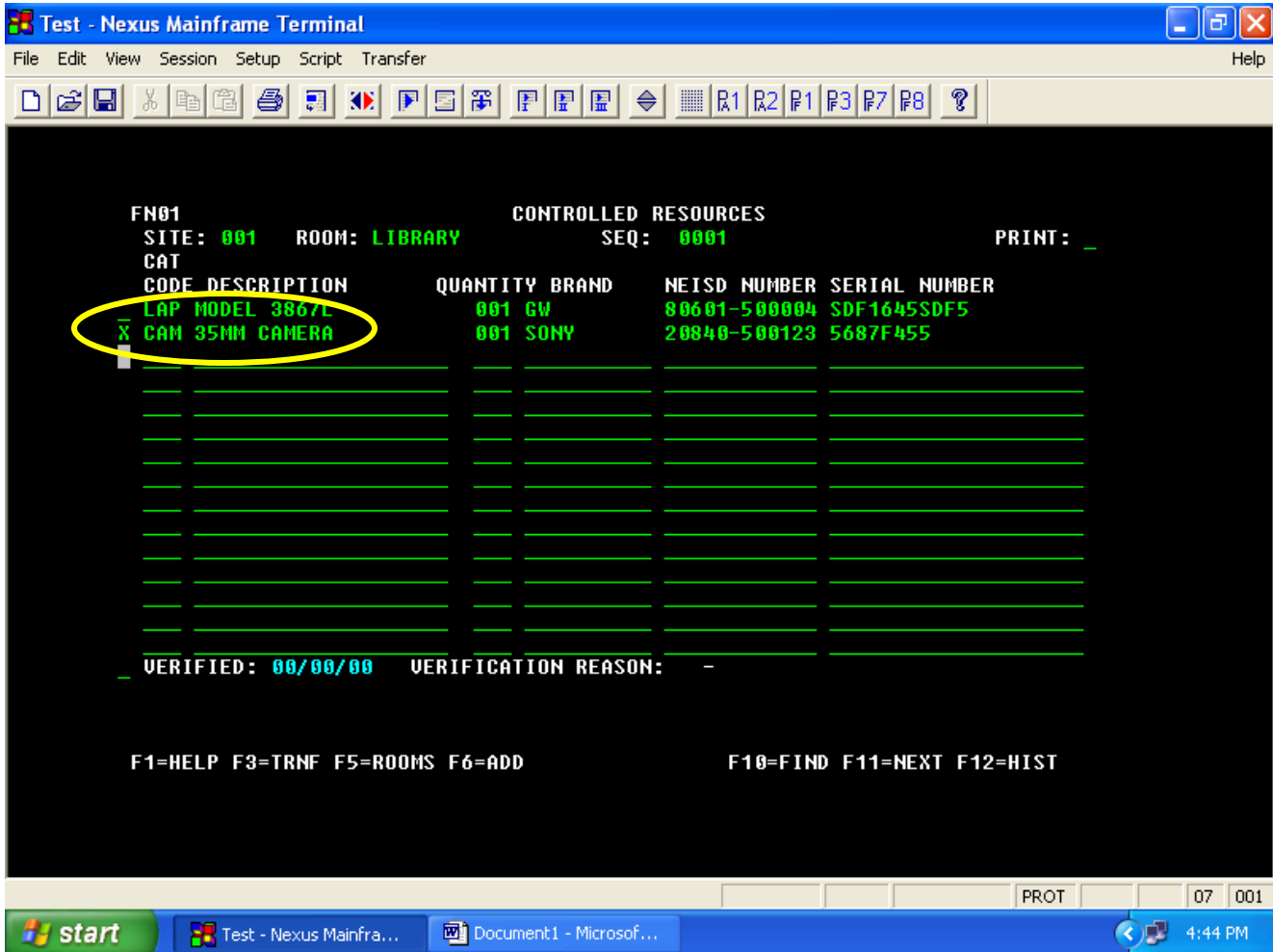
If there are no items to attach to the report, press **<F3>** to return to the main menu.

ATTACHING CRMS ITEMS TO A LOSS REPORT



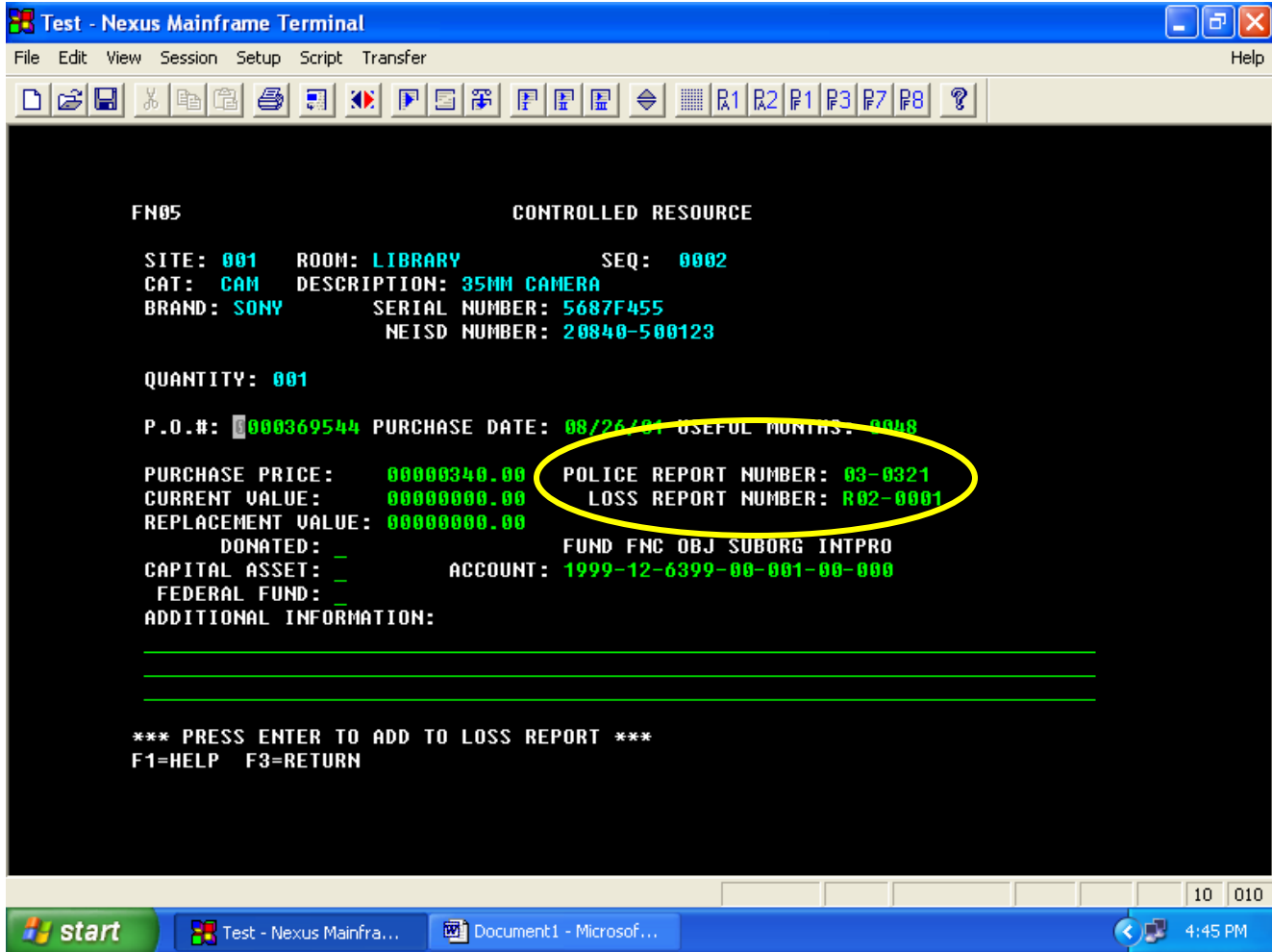
This page lists all CRMS items attached to the LOSS report. To add items to the LOSS report, press **<F5>**. This will link you to the CRMS database.

ATTACHING CRMS ITEMS TO A LOSS REPORT



Type in the appropriate CRMS Room Name/Number where the item is listed. Place an "X" next to the item(s) you want to attach and press **<Enter>**.

ATTACHING CRMS ITEMS TO A LOSS REPORT



The LOSS system automatically inserts the Police Report Number and the LOSS Report Number that was keyed in previously. To attach this item to the report, press **<Enter>**. If this is not the item you want to attach, press **<F3>** to return the CRMS screen and find the appropriate item.

ATTACHING CRMS ITEMS TO A LOSS REPORT

Test - Nexus Mainframe Terminal

File Edit View Session Setup Script Transfer Help

FN01 CONTROLLED RESOURCES

SITE: 001 ROOM: LIBRARY SEQ: 0001 PRINT: _

CAT

CODE	DESCRIPTION	QUANTITY	BRAND	NEISD NUMBER	SERIAL NUMBER
LAP	MODEL 3867L	001	GW	80601-500004	SDF1645SDF5
-L	35MM CAMERA	001	SONY	20840-500123	5687F455

VERIFIED: 00/00/00 VERIFICATION REASON: -

F1=HELP F3=TRNF F5=ROOMS F6=ADD F10=FIND F11=NEXT F12=HIST

start | Inbox - Micr... | CRMS | LOSS Prese... | MORE SCRE... | Test - Nexu... | 8:54 AM

The item will now be displayed in blue, with a “pending disposal” code of “-L”, for LOSS. Once the report is approved by Risk Management, the item(s) will be removed from inventory. From here, add more items by following the instructions on page 9, or press <F3> to return to the LOSS report.

ATTACHING CRMS ITEMS TO A LOSS REPORT

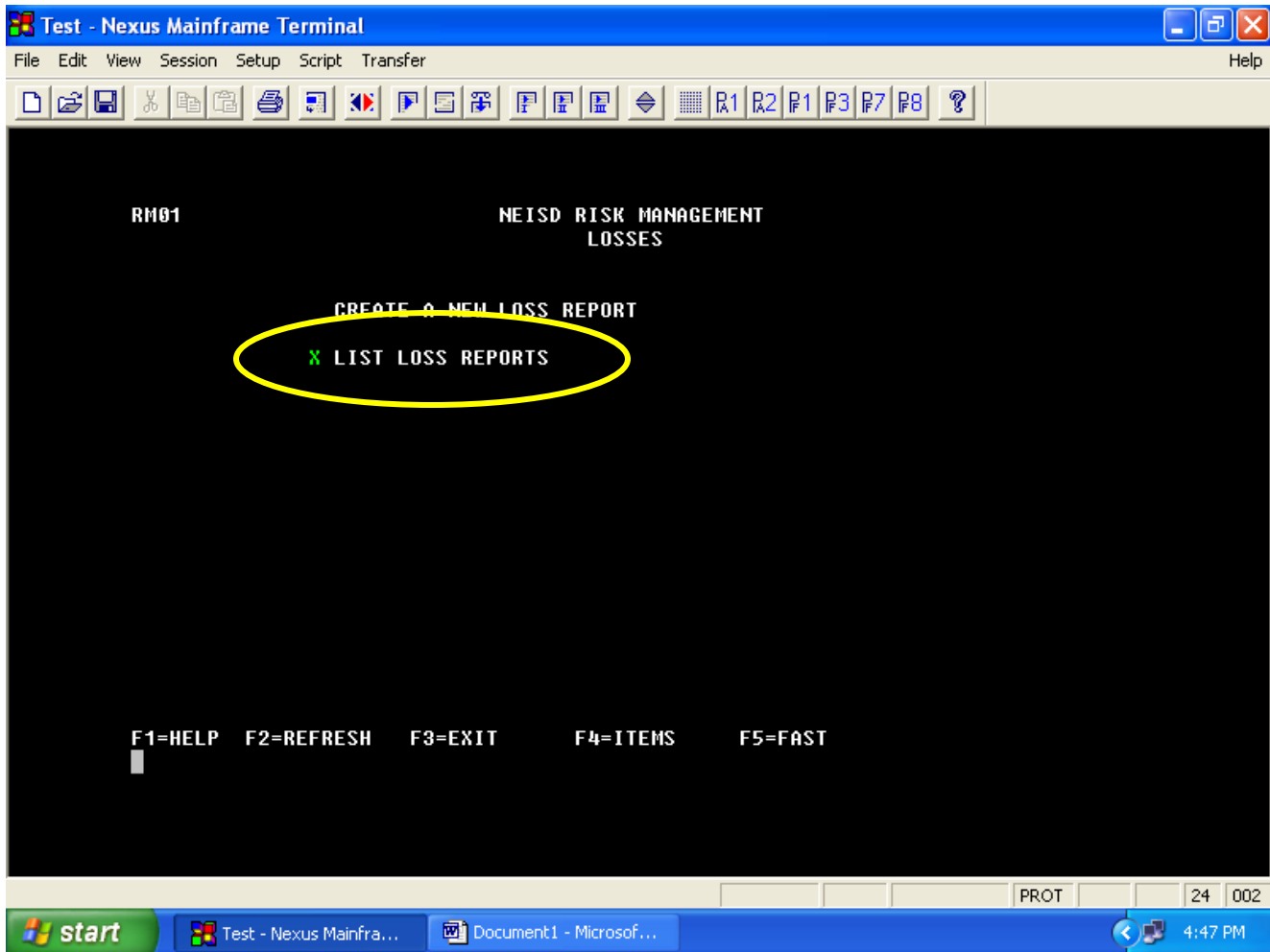
The screenshot shows a terminal window titled "Test - Nexus Mainframe Terminal". The main display area has a black background with white and green text. At the top left, it says "RM07". In the center, it says "NEISD RISK MANAGEMENT" and "LOSS REPORT ITEMS". On the right, it says "PRINT:". Below this, it says "LOSS REPORT: R02-0001" in green. A table follows with the following data:

SITE ROOM	QTY	DESCRIPTION	SERIAL	REPLACEMENT
001 LIBRARY	001	35MM CAMERA	5687F455	.00

At the bottom of the terminal window, it says "F1=HELP F2=REFRESH F3=MENU F5=ADD ITEMS" and "F9=RETURN". The terminal window is running on a Windows desktop, with the taskbar showing the start button, several open applications, and the time 4:53 PM.

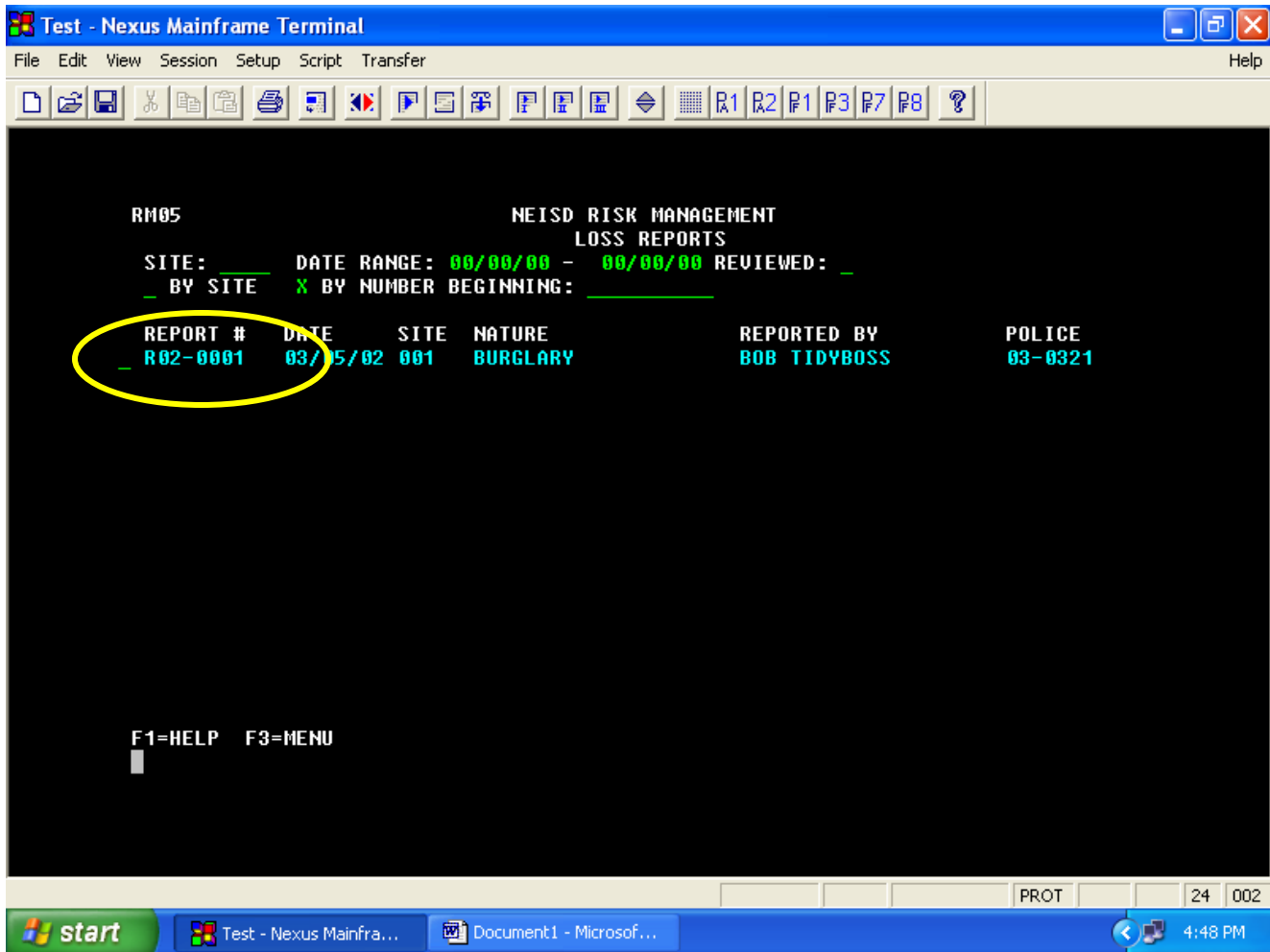
The item is now attached. If any other items need to be attached, press **<F5>** and repeat the previous steps. Press **<F9>** to return to the main page.

APPROVING AN EXISTING LOSS REPORT



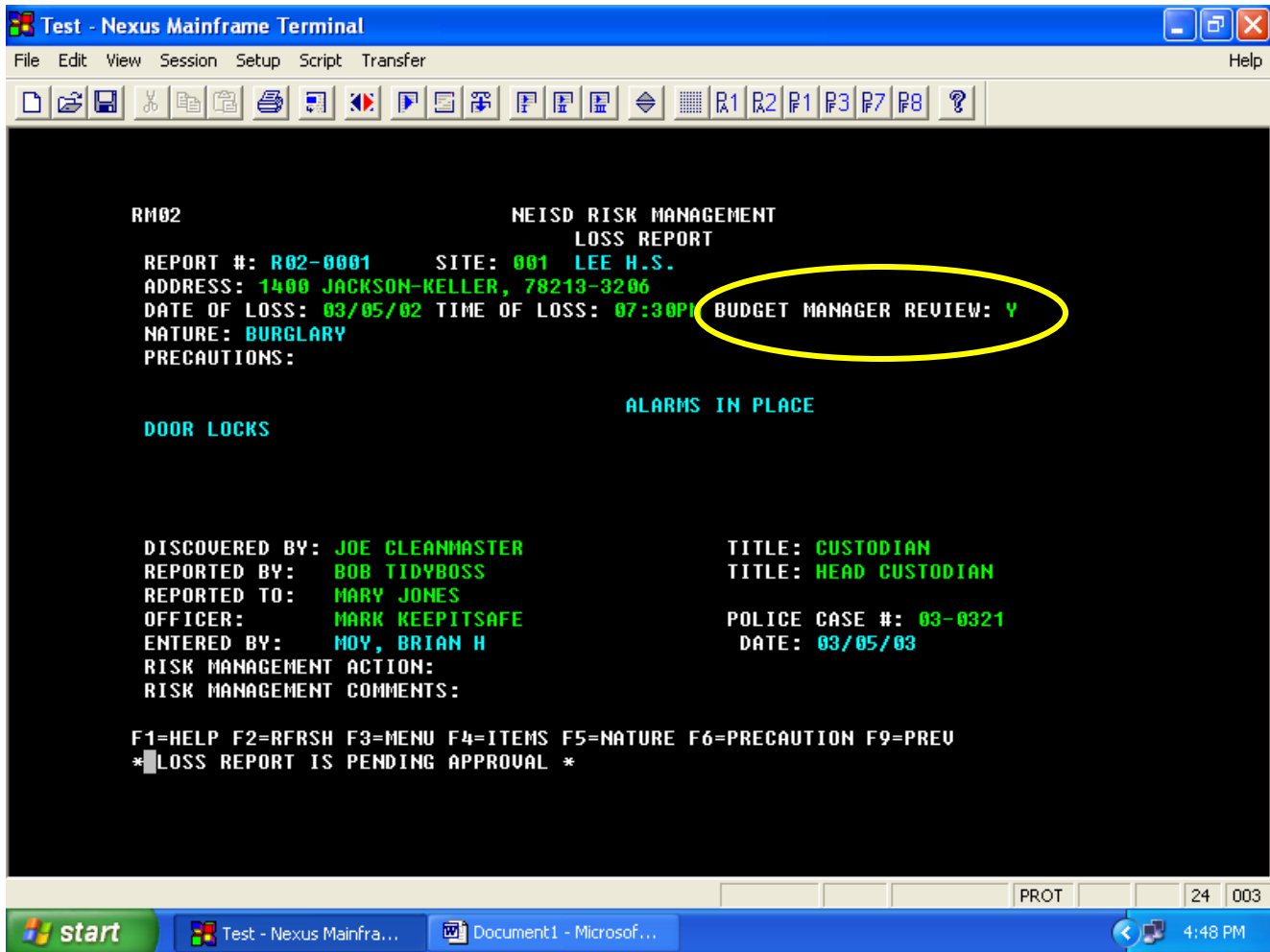
To approve a loss Report, log into the LOSS system as described on page 2. Place an "X" next to "List Loss Reports" and press **<Enter>**.

APPROVING AN EXISTING LOSS REPORT



Find the loss report to approve, place an "X" next to the report #, and press <Enter>. To narrow the search, enter a specific site number or the beginning of the report # and press <Enter>.

APPROVING AN EXISTING LOSS REPORT



The same assistant principal/budget manager that is responsible for approving CRMS transfers can approve LOSS reports. The assistant principal/budget manager can edit any field displayed in green before approving. To approve, place a “Y” next to “Budget Manager Review”, and press **<Enter>**.

APPENDIX A

NATURE OF INCIDENT DEFINITIONS

Burglary - involves property taken by forced entry to building

Robbery - taking property from individuals by use of violence or threat of violence

Missing item - item missing or lost with no signs of forced entry or physical damage to building

Employee Dishonesty - deceptive or fraudulent act committed by employee alone or in collusion with others

Vehicle Striking School Property - vehicle damaging school district property

Lightning- discharge of atmospheric electricity

Collapse - structural failure of building

Explosion - a sudden violent burst caused by a reaction or pressure

Flood - Rising water from heavy rain

Sprinkler Leakage - water leaking or discharge from fire suppression systems

Plumbing Leak - water from burst pipe

Roof Leak - water-penetrating roof, ceiling tile, walls

Boiler/Water Heater Leakage - leakage in boiler room

Hail - precipitation in the form of small chunks of ice

Vandalism - willful or malicious destruction or defacement of property

Riot/civil - commotion - public violence or disorder

Terrorism - violence committed by groups in order to intimidate a population or government

Plate Glass Breakage - windows or glass damage

Smoke - property damaged by gaseous products of burning

Other