## Introduction

This reference guide is aimed at Consumer Advocates or Risk/Quality Managers who are responsible for ensuring Feedback notifications have been followed up by the respective Line Managers, complaints and/or enquiries are resolved and closed and to post feedback ready for reporting

## What is "posting"?

Posting means a "master" version of the feedback notification is created. There is only <u>ONE</u> master version for each feedback notification created in RiskMan. This "master" version is used on all Feedback Reports

## Role of the "Poster"

When Feedback is entered by a staff member, optionally it is the responsibility of their Line Manager to review the Feedback and report their findings. It is then the responsibility of the Consumer Advocate or Risk/Quality Manager to ensure they review the details of the feedback and to:

- Check the **Review History** to see who else is aware of the feedback notification
- Create a **Distribution List** if others need to be informed of the feedback
- **Optional: Bookmark** the feedback notification to enable a quick return to the notification if required
- Check consistencies of Issue Classifications if applicable
- Save any details that need immediate change

### Follow-up on any Complaints/Suggestions/Enquiries

- Return to the Feedback (via Inbox or Bookmark)
- Ensure any complaints/enquiries/suggestion have been acknowledged and the **Date Acknowledged** field is updated
- If a complaint is a result of an Incident, link the incident to the complaint
- Add/Assign Journal Actions
- Edit Issues/Suggestions/Enquiries Ensure these are followed up or update as required
- Provide a response to the family This may include ensuring that all relevant documentation is linked to the Feedback notification via the Documents section and recording any response that may have been provided to the family e.g. phone calls, correspondence via the Journals

### **Close the Feedback Notification**

- Complaints may need to be resolved within a specific period of time e.g. within 30 days of being received.
   Ensure that the
  - Issues, once completed, are resolved & closed
  - Journal Actions, once completed, are marked as actioned
  - The Feedback Notification, once completed, is closed.
- Remove the **Bookmark** if required
- Post the Feedback Notification ready for reporting
- Modifications may be made after posting and these can be updated into the master record once received

### Reviewing & Posting Unposted Feedback

If I know the ID of the Feedback Notification you can use the "Go To" function to locate the notification

- 1. Press the **Go To** on the menu or press **ALT-G**
- 2. Select Item = Feedback and enter the ID
- 1. Press Enter or the Go button
- 2. If you have permission to the notification it will be displayed

🔅 🔾 My Workspace •	Management - Administration - Reports - Help - Log Out Feedback Module				
Feedback	Outstanding Tasks		Shor	tcuts	٠
Incidents	Bookmarked Records		1	5	0
Reporting	Go To		×	r draft	Medication error - 1W
Administration	Select an Item ID Number	Go			0
Managing Users	Feedback			dent	New Risk
Managing Risks	1 Distribution list is listed	_	V	Б	<b>4</b> 3
			Tricl		Wrist injury
	Incidents by Facility		_		

To view Feedback Notification from the Feedback Inbox page

To review a Feedback Notification, from the menu select *Management -> Inbox -> Feedback* and click on the Feedback ID **1** 

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				•		- 7		•	•			
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	æ	None	8		10 Apr 2015	1 Apr 2015		Suggestion	Wakefield		It was suggested	System Manager
-	۰	None	7		10 Apr 2015	1 Apr 2015		Complaint	Bowen		Advocate compla	System Manager
	æ	None	5		10 Apr 2015	9 Apr 2015		Complaint	Bowen		Client's friend thi	System Manager
	æ	None	- 4		10 Apr 2015	1 Apr 2015		Complaint	Wakefield		Patient complain	System Manager
	æ	None	з		10 Apr 2015	8 Apr 2015		Suggestion	Royston		Client suggested	System Manager
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			Feedback F	Review		
	You may m	ake any changes to the f	orm that are appropri	ate. Then click	'Submit' at the bott	om of the page.
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Related Item IDs	ß					
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Actions						
Bookmark Arch	hive Alert I	1e! Change History	Dist. List	Print	Display as: PDF	
Details						
Feedback Item						
Summary	client is unhappy with	service				
Detail	direct is up have with t	the way her son was treated or	a se eveneries to the evine	nina nonf	-	
	clienc is unnappy with	the way her son was treated of	an excursion to the swimi	ning pool	2	<u></u>
Feedback Objectives						
Related to Incident?	○ Yes ○ No					
Has an attempt been made to						
resolve the feedback matter?	🔾 Yes 🕓 No					
	Sav	e (without Posting)	Post			
	Sav	e any changes you have	Update any changes made	to this		
	made	to this Incident, and return to the Inbox.	posted record.			
		to the moot.	Publish changes to Authorised Users	o all		
	-					
	6	Save	Post	6		
Review History						
Date A User	Notes					
8 Feb 2010 11:15 Nurse, Mary (Nurse)	Created the incider	it item.				
8 Feb 2010 11:15	Risk Manager Emai					
8 Feb 2010 11:16 Nurse, Mary (Nurse)						
8 Feb 2010 11:16 Esler, Scott D. (Scott 8 Feb 2010 11:16		IT. ess after initial incident entry was :				
Show More Show All	Email sending proc	ess arter initial incident entry was :	successful.			
Show More Show All						

- 1. Review the feedback and follow-up as required
  - Fields displayed in yellow 2 are mandatory and must be completed before saving the notification
  - If you receive a complaint and compliment from the same person a linked feedback may have been created. If so, the ID's of the linked feedback will appear in the Control Panel of the reviewed Feedback. Click on the respective ID S to view the other feedback notifications linked with the displayed notification. <u>Each feedback in the link</u> <u>needs to be reviewed, updated and saved</u> <u>separately</u>
  - The Review History ④ at the bottom of the feedback will indicate to you who has been notified of, edited or viewed the notification, create a distribution list to let others know about the Feedback notification
- 2. If changes are made to the feedback, either
  - Press Save without posting <sup>(5)</sup>, if you want to save your changes but not "post" the notification. In this case the notification will remain in the "Inbox" for posting at a later stage
  - Press Post ③ if you want to save your changes and "post" the notification ready for reporting. In this case the notification will be removed from your "Inbox" view and will be available to view and edit in the "Posted Feedback" listing

### Can I link a Complaint to an Incident?

If a complaint is a result of an incident, the Incident/s that are associated with the Complaint can be linked

- 1. Open the Feedback from the Feedback Inbox page
- 2. On the Unposted Feedback Entry Review page, select 'yes' for **Related to Incident? 1** 
  - A Search window will display
- 3. Enter your search criteria 😢
- 4. Press Search 8
- 5. Check mark ④ the incident/s that you wish to associate the Feedback to
- 6. Repeat steps 3-5 if you wish to associate more incidents from another search
- 7. Press Submit 😏

Details	
Feedback Item	]
Summary	client is unhappy with service
Detail	client is unhappy with the way her son was treated on an
Feedback Objectives	
Related to Incident?	● Yes O No
Select IDs	
Please enter your Event search phrase and/or ot Search Phrase	her search criteria then click Search
	Event category
Incident date From Incident date To	
Region	Hospital / Site
Area	Patient Hospital Number
First name (Contains)	
Surname (Contains)	
Search	Clear Close

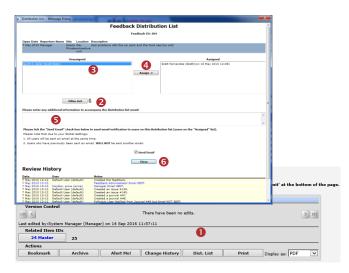


## How do I let others know of the feedback?

If, after reading the feedback and looking at the **Review History**, you think other people within your organisation should be notified of the feedback, you can create a **Distribution List** 

- 1. Click on the **Dist List 1** button
- Search for the users using the Filter List ② option e.g. filter by the user's first or last name
- Highlight the user in the Unassigned List 
   <sup>®</sup> and press
   Assign 
   <sup>9</sup>
- 4. Repeat steps 2-3 if more users are to be notified
- Recommended: Enter a comment S explaining why the selected users are being distributed the Feedback. This comment will be included in the distribution email
- 6. Press Close 6
- An email notification will be sent to the users on the Assigned List who have an email address in their user profile

**Note:** If there are already users in the Assigned list when you are creating a Distribution list, it means that the users have not yet read the Feedback – **do not delete** them from the list as it may negate the user's permission to the Feedback notification. Only the newly added users will receive the email



## Can I view comments sent in a Distribution List?

At this stage, it is not possible to view these comments. They will only be available in the email that is sent to the respective users.

## What is the "Bookmark" function?

Bookmarking places the feedback notification into your "Bookmark Items" list available in your *My Workspace -> Reminders & Alerts* page. You may wish to bookmark (flag) the feedback as one you would like to follow-up later or requires further information before investigations are underway.

To bookmark a Feedback Notification, click on the **Bookmark** • button

	Feedback Review
	You may make any changes to the form that are appropriate. Then click 'Submit' at the bottom of the pag
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Version Control	
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Last edited by:System N	Manager (Manager) on 14 Sep 2016 11:57:11
Related Item IDs	
24 Master	25
Actions	
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### How do I view my bookmarked feedback?

All your bookmarked feedback (and incidents) will be listed in your **Bookmarked Items 1** list under your *My Workspace -> Reminders & Alerts* page

- To open the Feedback, click on the <u>Notification Date</u> link
- 2. To remove the bookmark, click the **Bookmark** button on the **Control Panel**

0	istribu	tion Lists: 0		Bool	kmarked Items: 29		Allocated Acti	onsi 2	Allocated Journal Actions: 4
rou have	bookm	arked the foll	owing 2	2"					
type	Days	Assigned	<u>10</u>	Notification Date	Reporter's Name	Surname	Location	Summary	
Incident	1764	14 Dec 2005	3411	23 Sep 2005	Knoblauch, Kim	Garde	Day procedure unit	Pt hit staff me	meber while giving medication
Incident	1758	20 Dec 2005	3427	24 Nov 2005	Mr. Manager	etewt	Dietetics	test	
Incident	1685	3 Mar 2006	3466	10 Feb 2006	winter, barb	Smith	Centre Block 2nd Floor	Pt was adminis	tered the wrong drug
Incident	1685	3 Mar 2006	3454	9 Jan 2006	Mr. Manager	hayden	Consulting suites	distribution list	one
Incident	1644	13 Apr 2006	3491	16 Mar 2006	System Manager	Smith	Continence Service	Fall from bed	
Incident	1512	23 Aug 2006	3626	23 Aug 2006	System Manager	dummy	Dietetics	test	
Incident	1498	6 Sep 2006	3638	5 Sep 2006	System Manager	test	Dayton	test	
Incident	1350	1 Feb 2007	3648	31 Jan 2007	winter, barb	Smith	CDAMS	fall	
Incident	1350	1 Feb 2007	3644	26 Sep 2006	Brett Fernandez	tanner	Dietetics	TEST	
Incident	1350	1 Feb 2007	3603	21 Aug 2006	Nurse 2	test	Dayton	test	
Incident	793	11 Aug 2008	3618	22 Aug 2006	winter, barb	hayden	AC1	back injury	
Incident	751	22 Sep 2008	3758	4 Apr 2008	Smith, John	Smith	Centre Block 1st Floor	Aggressive too	ards staff member
Feedback	747	26 Sep 2008	156	18 Jul 2008	barb	Smith	Consulting suites	t3ts	
Feedback	747	26 Sep 2008	158	18 Jul 2008	Brett	asdf	Day procedure unit	asfd	
Feedback	747	26 Sep 2008	163	23 Jul 2008	Manager	Smith	Centre Block Sth Floor	Problem with t	he admission process
Feedback	747	26 Sep 2008	169	11 Sep 2008	Manager	Smith	AC1	Not happy with	the waiting time for the appointment
	747	26 Sep 2008		1 Feb 2008	Manager	Smith	Continence Service		he admission process

## Can I print a copy of the feedback?

A copy of the current version of the feedback notification can be printed from an opened notification in different formats e.g. Word<sup>™</sup>, PDF or Excel<sup>™</sup>

- 1. In the Control Panel, select an output format 0
- 2. Press Print 😢

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Version Control							
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24 Master	25				9	•	
Actions							
✓ Bookmark	Archive	Alert Mel	Change History	Dist. List	Print	Display as: PD	F V

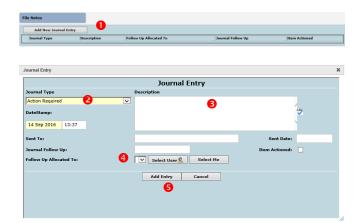
# How do I add a Progress/File Notes or assign a task?

Journals are used add progress/file notes and can also be used to assign a task or action or another RiskMan User. When you assign an action or task, the assigned user will be sent an email notification with details of the task and a link to the Incident

### To add a Journal

- 1. Press Add Journal **1**
- 2. Select a Journal Type 🛛
- 3. Enter a description <sup>6</sup> of the Journal

- 4. If you are assigning a task
  - Enter a **due date** or select the date using the date picker in the **Followed up Date** field **4**
  - Assign a user in the Follow-up User field 
     press the Filter button and search for the user. You will need to select the user from the Follow-up User field once you have used the filter option
- 5. Press Add Entry 6
- If the journal is <u>not</u> allocated to a user, it will automatically be actioned once the feedback is saved
- If the Journal <u>is</u> allocated to a user, once the Feedback is saved an email notification will be sent to the allocated user with details of the Journal and a link to the Feedback Notification
- If the Journal is not actioned by the due date then an email reminder will be sent to the allocated user as well as the creator of the Journal



# How can I view a list of outstanding tasks assigned to me?

If you have been assigned a task via the Journals, all your un-actioned Journals will be listed in your **Allocated Journal Actions 1** list under your *My Workspace -> Reminders & Alerts* page

- 1. Click on the Created 2 date link to open the Feedback
- 2. Once you have actioned the Journal it will be removed from this list

Reminde						<u>^</u>	
Dist	tribution Lists: 1	Book	marked Items: 9	Alloca	ted Actions: 3	Allocated Journal Actions: 22	
Type	Davs	Action Due By	ID Journal Creato	2 r Created	Summary		
			10 Journal Creato		Summary Please look into this	one	
Feedback	No Due Date	No Due Date		r Created			
Feedback Feedback	No Due Date	No Due Date No Due Date	162 Manager	29 Jul 2008	Please look into this	one	
	No Due Date No Due Date	No Due Date No Due Date 21 Aug 2006	162 Manager 217 Manager	r Created 29 Jul 2008 20 Aug 2010	Please look into this Please look into this this is action to be ta	one sken lation that will assist with preventing a needle stick	

## How do I action a Journal?

If a Journal is assigned to you, to ensure the creator of the journal knows that you have completed the task, the Journal should be <u>actioned.</u> To action a journal task follow the below steps:

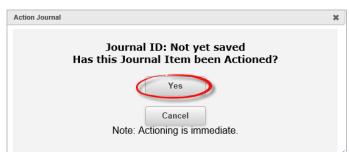
Press the Action 

 button next to the respective Journal

DateStamp	Journ	al Type	Description		Journal Username	Follow Up Allocated To	Item Actioned	
24 Apr 2017 10:31 Action taken		n taken	Please action the fol	lowing task Manager		Manager	False	
Journal Type:		Action taken	<i>R</i>	DateStamp: 2	4 Apr 2017 10:31	Reference:	7	
Description:		Please action t	he following task		•			
Follow Up By D	ate:			Item Actioned:	o Action	Follow Up Allocated Syste To:	em Manager (Manager	

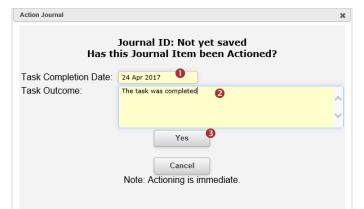
 A pop-up will appear asking if the journal item has been actioned. Depending on your system configuration, you will see either of the below messages:

### **Option A**



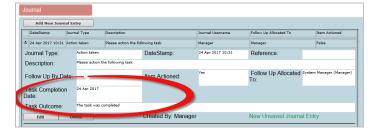
If you see this message click 'yes' to action the journal

### **Option B**



If you see this message you must fill out two mandatory fields; Task Completion Date ① and Task Outcome ② before clicking 'yes' ③ to action the journal. You will not be bale to action the Journal without filling out these fields. Once these fields have been filled out, they will be viewable from the Journal entry section of the feedback form.

# RISKMAN REFERENCE GUIDE TO FEEDBACK MANAGEMENT

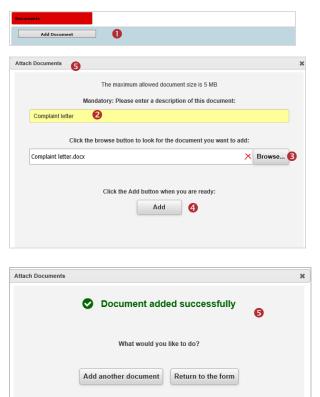


3. Press **Submit** at the bottom of the feedback to update your changes

## Can I attach a file to a Notification?

Relevant files of any description, can be attached to a Feedback notification via the **Documents** section e.g. correspondence, photos, policies

- 1. Press the Add Document **0** button
- 2. Enter a **Description 2** of the file
- 3. Press Browse (S) to locate the file
- 4. Once the file is selected press Add ④
- A pop-up will appear asking if you want to add another document or return to the form 6



## To view an attached document

 Click on the View 1 icon next to the document you wish to view Click on the occument Details icon to view the Document Details and Document Review History 2

ID	Document Name	Description	Date Attached	Attached by	Size (KB)	Actions
500037	Complaint letter.docx	Complaint letter	18 Apr 2017 11:44	Manager	427	@ 0

# How do I know which feedback I have viewed and those modified since I last viewed them?

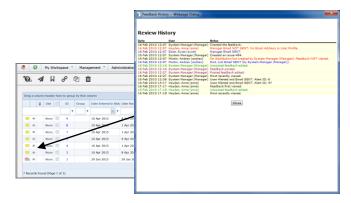
Next to each feedback notification on your feedback list there is a coloured flag which represents your viewing status of your feedback

- You have viewed the feedback and there have been no modifications
- There have been modifications (including journals) since you last viewed the feedback
- You have not yet viewed this feedback

### To view the Review History of a feedback notification

1. Click on the **Eye** next to the feedback

The **Review History** will display. This information will enable you to see if there were amendments made to the Feedback that you were perhaps waiting on



# How do I view the changes that have been made to the feedback notification?

Each time a change is made to a feedback notification another version of the feedback is created; this ensures the original version is kept intact. The feedback you are viewing is always the most current version

**Note:** There is no history to changes made to Journals, Documents and Issues; however there is an entry in the Review History documenting who has made changes in these areas of the Feedback Notification

### To view the changes made to the feedback

 In the Control Panel you will need to click on the Previous Edit 

 icons to view the previous versions of the Feedback Notification

# **RISKMAN REFERENCE GUIDE TO FEEDBACK MANAGEMENT**

			Feedback	Review	
		You may make any changes to the form	n that are appropr	iate. Then clic	k 'Submit' at the bottom of th
Control Panel					
Version Control					
« < 🌔		There have been no e	dits.		> >>1
		er) on 14 Sep 2016 11:57:11			
Related Item IDs	7				
24 Master	25				
Actions					

 To return to the most current version (modifications can only be made on the current version) click on the View Last Edit <sup>2</sup> icon

	Feedback Review
	You may make any changes to the form that are appropriate. Then click 'Submit' at the bottom of the pag
Control Panel	
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I<< <	There have been no edits. (2) >>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>
Last edited by:System	Manager (Manager) on 14 Sep 2016 11:57:11
Related Item IDs	
24 Master	25
Actions	
✔ Bookmark	Archive Alert Me! Change History Dist. List Print Display as: PDF 🗸

## **Reviewing & Posting Edited Posted Feedback**

After a Feedback Notification has been posted, it can be edited e.g. documenting conversations with the Complainant, attaching correspondence, closing the Feedback notification. Changes made to fields on the Feedback Entry form after a Feedback notification has been posted will be displayed in a red box underneath the modified field. It will be your responsibility to accept these changes if they are to be included in the Feedback notification, or not accept them if you feel that the change should not be part of the master version of the Feedback notification

**Note:** Changes to the Journal, Action, Issue or Document sections will not display a red box under the changes as there is no history to these changes. However for Journals, Actions and Issues a reference to any changes will be displayed in the Review History

and for Documents by clicking on the *icon next to the* attached document a Review History can be viewed

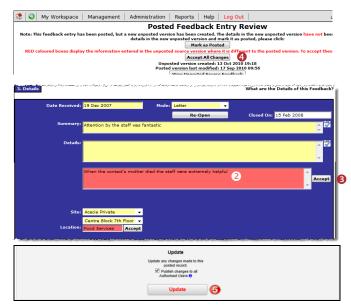
1. If you wish to view changes from the Inbox, click on the Status Flag (as described on the previous page) next to

the edit posted Feedback (indicated by a red icon where fields on the Feedback notification have been modified)

 To view the Feedback notification, click on the Feedback ID 0

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ę i	Closed On	Date Received 💡	Date Entered in Risk	Group	ID	Dist 🔲	Û	
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- All changes to fields on the Feedback Notification (except those changes in Journals, attached documents or the fields in the Items pop-up window) will appear in a red box ② under the modified field
- If you with to <u>accept changes on an individual field</u> press the respective Accept <sup>6</sup> or Accept Block button
  - Those changes not accepted will not be included in the master version of the Feedback but will remain in the unposted version of that Feedback
- Alternatively, if you wish to <u>accept all changes</u> in the feedback press the Accept All Changes <sup>(1)</sup> button
- Press Update the Posted Record S to update the posted version of the notification
  - The Feedback will be removed from your Inbox view and the updated changes will be available to view in the "Posted Feedback" listing



# How do I access Posted Feedback?

Posted Feedback Notifications are accessible by selecting

1. Management -> Enquiry -> Posted Feedback

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Drag	a co	dumn	heade	r here	to gro	up by the	it col	lumn								
		0	Dist		ID	Group		Date Entered in RiskMa	Date Received	٠	Closed On 🔻	Site 🔻	Location •	Summary •	Reporters Name	
						•	7			• •						
ø	۰		None		10	0		10 Apr 2015	1 Apr 2015			Royston		Grandma thinks our	System Manager	
ø			None		6	-		10 Apr 2015	1 Apr 2015			Royston		Health Commission	System Manager	
×	۰		None		2			10 Apr 2015	7 Apr 2015			Bowen		GP called to thank u	System Manager	
N			None	13	1			29 Jan 2015	29 Jan 2015			Site		8	System Manager	

- To view and edit a posted feedback notification, click on the Feedback <u>ID;</u> make changes as required and press the **Update the Posted Record** • button at the bottom of the notification to save your changes
  - The posted Feedback will be updated will be updated directly and a copy of the changes will be made available to the equivalent unposted



version. The Feedback will not re-appear in the Inbox view

### 3. To return to the Posted Feedback page

Select Management -> Enquiry -> Posted Feedback

			Compare Source	View Source			
			Compare Source	view Source	e		
Control Panel							
ast edited by:System	n Manager (Manager)	on 10 Oct 2016 08:38	3:48				
Actions	1	1					
Bookmark	Archive	Alert Me!	Change History	Dist. List	Print	Display as: PDF	~
ID: 18							
-							
Feedback Notification							
Date Received *	10 Oct	2016		Date Entered in Ris	kMan * 1	10 Oct 2016	
Complaint Reopened	, Ov.						
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Which Health Servic	a/Location does thi	is feedback belong t		⊖ in Person ⊖ C	ther		
		is feedback belong t		⊖ In Person ⊖ G	ther		
Site		<mark>is feedback belong t</mark> at Health Services	<u>»?</u>	O In Person O C	ther		
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## Features of the Posted Feedback page

### Compare Source

This feature allows you to view the current posted version of the feedback notification and compare it to all the unposted versions.

If there is a difference between the current posted version and the compared unposted version, the details will appear in a **red box** under the respective field.

Updates can be made from any view by pressing the Accept button next to the fields that you wish to modify. On saving the feedback, the posted version will be updated directly

### View Source

This feature allows you to view the unposted versions of the feedback notification.

Updates can only be made to the **current** unposted version of the feedback. Any updates will force the feedback to return to the **Inbox** view and requires the modifications to be **accepted** and the feedback to be re-posted

### Note: This function is not commonly used

## Can I delete a Feedback Notification?

Deleting feedback can be done if

- There are duplicate notifications i.e. more than one person has entered the same complaint; or
- If the feedback being entered is not acceptable as per your organisational definition e.g. A staff grievance

Before deleting a feedback notification it is suggested that you

- Enter a Journal providing a reason why you are deleting the notification and perhaps communicate this to the person who entered the feedback.
- If you have a duplicate feedback notification you may like to reference the ID of the deleted feedback and copy the "Details" of the deleted feedback into a Journal of the feedback you are keeping (to ensure you capture both versions of the feedback description)

Deleted feedback notifications are flagged as deleted and can be restored if required. All users with permission to the feedback can still view the deleted feedback but cannot edit it

### **Deleting Unposted feedback**

- With the Feedback Inbox open, check the record selector 

   next to the unposted Feedback notification/s that you wish to delete
- Press the Delete O icon. The Feedback notification/s will be flagged as deleted and will be available in the Deleted Feedback list if they need to be restored

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### To delete Posted feedback

- With the Posted Feedback page open, check the record selector 

   next to the posted Feedback notification/s that you wish to delete
- Press the Delete licon. The posted Feedback notification/s will be removed from the database. The unposted versions will be flagged as deleted and will be available in the Deleted Feedback list if they need to be restored

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## How do I restore Deleted Feedback?

Deleted Feedback notifications are located in the "Deleted Feedback" page.

1. From the **Feedback Inbox** page, enter Selection

Settings via the icon •, select Display = Deleted Feedback • and press Apply Settings •

З

2. Check the **record selector ()** next to the Feedback (you can select more than one) that you wish to restore

Press the <b>Restore 9</b> icon	
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Press the **Restore** icon The Feedback will be restored to the "Inbox" view and will be ready for

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# What is a Linked Feedback notification?

A linked feedback is when one or more Feedback notifications have been linked together for a specific reason e.g. a complaint and a compliment have been received by the same person; or one person has provided multiple complaints over a period of time

### Linked Feedback can be created 3 ways

- After the first notification is submitted, by clicking on the "Click here to create a linked feedback" button after a new Feedback notification has been saved
- From the "Feedback Inbox" or "Entered Feedback" page by checking the notification you wish to link from, and pressing the "Make Linked" button which will open a copy of the Feedback
- If the feedback notifications were entered separately they can be linked together using the "Link Incidents" function on the "Feedback Inbox" page

### How can I tell if feedback has been linked?

On opening the feedback notification from the **Feedback Inbox** or **Posted Feedback** page, the ID's of the linked feedback will display in the Control Panel under the **Related Feedback** heading.

# **Note:** The **"Link"** column available in the **Incident Lists** page is not available in the Feedback listing pages

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# How do I create a new linked feedback from an existing notification?

If you need to create a linked feedback from an existing notification

 On the Feedback Listing page (e.g. Feedback Inbox) click on the **Record Selector** • next to the feedback you wish to create a linked feedback with

### 2. Press the Clone and Link @ icon

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- A copy of the Feedback notification will open. Make any changes to the feedback as required and press Save Feedback
- If you then need to create another linked feedback press the "Click here to create a related 'Linked Feedback'" button on the Feedback Saved page

**Note:** The content of the fields copied when creating a linked Feedback can be modified. Please contact RiskMan support – <u>support@riskman.net.au</u> if changes are required

## How do I link 2 or more feedback together?

If you find that 2 or more feedback notifications should have been linked but were not



1. Add the ID of a record you wish to link

2. **New**: Enter the reason you are linking/de-linking this new record. The reason will be recorded in the Review History of the <u>master</u> record. Another Review History entry will be made in the master record while performing actions like linking, de-linking, changing the master record, and dissolving the group.

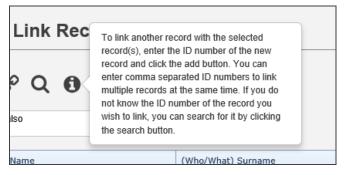


Revie	w Hist	ory	
Date		User \$	Notes
27 Mar 20	017 13:17	System Manager (Manager)	Created the incident item.
27 Mar 20	017 13:17	System Manager (Manager)	Incident item posted.
27 Mar 20	017 13:17	System Manager (Manager)	Most recently viewed.
27 Mar 20	017 13:17	Megan Kirkby (kirkbym)	User Alerted and Email SENT. Alert ID: 2
27 Mar 20	017 13:17	Kim Edgar (edgark)	User Alerted and Email SENT. Alert ID: 18
27 Mar 20	017 13:17	Anne Wright (wrighta)	User Alerted and Email SENT. Alert ID: 20
27 Mar 20	017 13:17	Anthony Vidler (vidlera)	User Alerted and Email SENT. Alert ID: 21
27 Mar 20	017 13:17	Peter Simmonds (simmonp)	User Alerted and Email SENT. Alert ID: 22
27 Mar 20	17 13 17	Line manager (Line manager)	User Alerted and Email NOT SENT. Alert ID: 45
27 Mar 20	017 13:26	System Manager (Manager)	Linked to ID 282
27 Mar 20	017 13:26	System Manager (Manager)	Linking/De-Linking Reason: This person was involved in the event also

- 3. Click to link the record you entered in **0**
- 4. **New**: Search tool helps you find a record so that you don't necessarily need to know its ID number:

Search Phrase			Item Id
(Associated) Division	V	(Associated) Department/Service	
(Who/What) First Name (Contain			•
Who/What) Surname (Contains)			
(When) Incident Date From	(When) Incident Date To		

5. This info icon will display a tool tip, providing the user with advice on using the tool:



- De-link all records (previously the "Dissolve Group" button)
- 7. Click to exit the dialog
- 8. **New**: The Master record will now always be the first one listed
- 9. Click to promote a record to be the Master record
- 10. Click to de-link the selected record

### What happens if I go on Leave?

Refer to the **Personal Delegates Guide** accessible via the menu *Help -> RiskMan Quick Guides -> Personal Delegates Guide*