Introduction

This reference guide is aimed at Risk/Quality Managers and/or OHS Managers who are responsible for ensuring Incidents have been followed up by the respective Line Managers, and to post incidents ready for reporting

What is "posting"?

Posting means a "master" or the "official" version of the incident is created. There is only **ONE** master version for each incident created in RiskMan. This "master" version is referenced on all Incident Reports.

Role of the Risk/Quality Manager

When an incident is entered by a staff member, it is the responsibility of their Line Manager to review the incident and report their findings. It is then the responsibility of the Risk/Quality Manager to ensure they review the details of the incident and to:

- Check the **Review History** to see who else is aware of the incident
- Create a **Distribution List** if others need to be informed of the incident
- **Optional: Bookmark** the incident if you wish to enable a quick return to the incident
- Check the incident has been investigated and ensure the accuracy and completeness of the Incident
- Check for consistencies with the data e.g. Classifications, Severity Level
- Remove any inappropriate statements or unfounded allegations as organisational policy may dictate
- **Submit** any details that need immediate change

Follow-up the Incident

- If further clarifying information is required, create a distribution list to request further action/ information or assign a task through the Journals
- Update **Findings**

Complete & Post the Incident

- **Suggestion:** Once an action plan has been established or there is no action plan required as a result of the incident, you may wish to close the incident by entering the date into the **Closed Date** field in the **"When Did It Occur"** section of the incident. This can be done before or after posting the incident
- Ensure **Journals** are actioned as required
- **Post** the Incident once there is sufficient information for the master record. Posted incidents can then be reported on
- Modifications may be made after posting and these can be updated into the master record once received

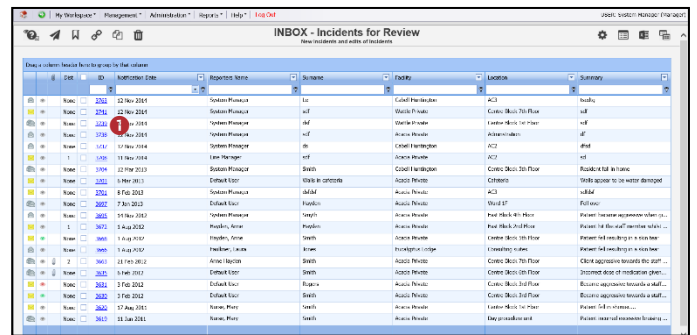## Reviewing & Posting Unposted Incidents

If you know the ID of the Incident you can use the "Go To" function to locate the incident

1. Press the icon on the menu or press **ALT-G**

2. Select **Item = Incident** and enter the **ID**

3. Press **Enter** or the **Go** button
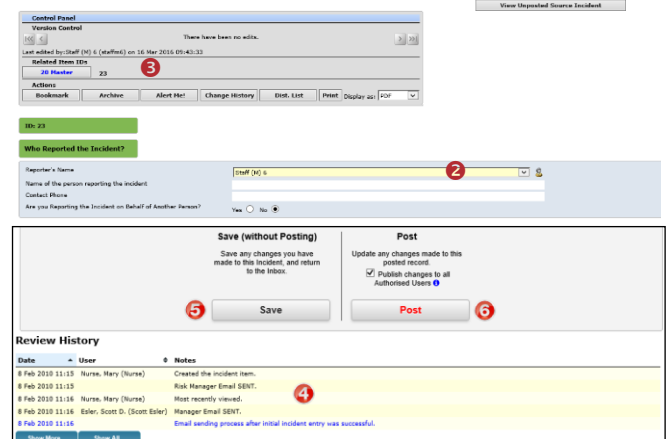
4. If you have permission to the incident it will open
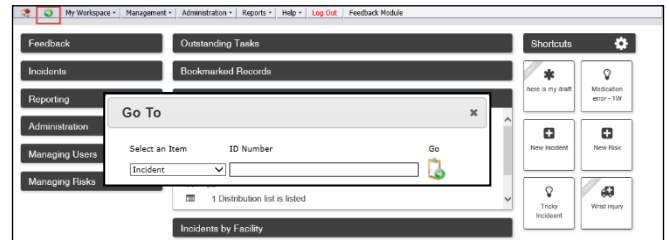
To review an unposted incident

From the menu select *Management -> Inbox -> Incidents.* This will display a list of incidents that you have permission to view e.g. via an alert

1. To view an incident from the Inbox page, click on the Incident **ID** ❶

2. Review the incident and ensure the Line Manager has investigated and reported their findings

   - Fields displayed in **yellow** ❷ are **mandatory** and must be completed before saving the incident

   - If the incident involves more than one person and a linked incident has been created, click on the respective **ID** ❸ to view the other incidents linked with this incident. **Each linked incident needs to be reviewed and submitted separately**

   - The **Review History** ❹ at the bottom of the incident will indicate to you who has been notified of, edited or viewed the incident. If required create a **distribution list** to notify other users of the incident

3. If changes are made to the incident, either

   - Press **Save without posting** ❺, if you want to save your changes but **not "post"** the incident. In this case the incident will remain in the "Inbox" for posting at a later stage

   - Press **Post** ❻ if you want to save your changes and "post" the incident ready for reporting. In this case the incident will be removed from your "Inbox" view and will be available to view and edit in the "Posted Incidents" listing

4. The changes will be visible to all authorised users and the original version of the incident will remain intact