## Introduction

This guide is aimed at Managers who are required to review and investigate incidents reported by their staff.

### **Role of the Line Manager**

When an incident is entered by a staff member reporting to you, you will be notified via email. You can either

- Click on the link in the email to open the incident or
- From the menu select My Workspace -> Review My -> Incidents. This will display a list of incidents entered by you; your staff; or those that you have been granted permission to via an alert, distribution list or a Journal

### Review the detail of the Incident

- 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 consistencies of classifications
- Remove any inappropriate statements or unfounded allegations as organisational policy may dictate
- Submit any details that need immediate change

### Investigate the Incident

- Return to the Incident (via Bookmark or Entered Incidents page)
- Update Findings e.g. Severity, Controls Implemented, Investigation/Findings, Journals, attach relevant files

### **Complete the Incident**

- Remove the **Bookmark**, if applicable
- Ensure **Journals** are actioned as required
- **Optional:** Mark Incident as **Finalised**

### **Reviewing 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 view an incident from the Entered Incidents page

• Click on the Incident ID 1

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- 1. Review the Incident and investigate as required
  - Fields displayed in **yellow 2** 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 S to view the other incidents linked with this incident. <u>Each linked incident needs to</u> <u>be reviewed and submitted separately</u>
  - The Review History ④ 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
- If changes are made to the incident press the Submit
   button at the bottom of the incident
- 3. The changes will be visible to all authorised users and the original version of the incident will remain intact

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

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

- 1. Click on the **Dist List 0** button
- Search for the users using the Filter List ② option e.g. filter by the user's first or last name
- 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 incident. These comments will appear on the email that is sent to the nominated users and can also be accessed from the Review History of the Incident
- 6. Press Send Email & Close @

**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 incident – **do not delete** them from the list, as this could negate their permissions to the incident. Only the newly added users will receive the email



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

The Comments included in a distribution list email can be viewed by the sender/receiver via the **Review History** of the Incident

To view the comments click on the <<u>Email></u> link in the Review History

| Review   | v History  |  | Show Log Email Web Page Dialog   |  |          |  |
|--|--|--|--|--|----------|--|
| Date<br>16 Feb 201<br>16 Feb 201 | 0 199.32 System Manager (Manager)<br>0 0932 System Manager (Manager)<br>0 0932 Edier, Sott (sott)<br>0 0932 Edier, Sott (sott)<br>0 0932 Edier, Sott (sott)<br>0 0932 Edier, Sott (sott)<br>0 0942 Risk Manager (Isk manager)<br>0 0942 Risk Manager (Isk manager)<br>0 0942 Risk Manager (Manager)<br>0 0943 Risk Manager (Manager) | Note:<br>Description of the incident.<br>Risk Manager Imali SINT.<br>Manager Imal SINT Ins Imail address<br>Manager Imail SINT SINT Ins Imail address<br>fimal SINT: Distribution, Nr Roman<br>Terral SINT: Distribution, Nr Roman<br>User Alerted and Email Not Sint: Alex ID: 1:<br>User Alerted and Chail Sint: Sint: Alex ID: 1:<br>User Alerted and Chail Sint: Sint: Alex ID: 1:<br>User Alerted and Chail Sint: Sint: Alex ID: 1:<br>Distribution of the sint: Alexandron of the sint: Alexan | Email sent to:<br>Sent From :<br>Incident ID:<br>Set Of Email:<br>Brett can you<br>out some more<br>then please e<br>will be notif | Distribution E-Mail Text.<br>Bet Fernades (Menage)<br>States Manages (Manage)<br>342<br>please follow-up with Mary and find<br>details about this accident. Could you<br>neer the information into a Journal. I<br>led once you have added the journal | с IS и D |  |
|  |  |  | <  |  | >        |  |

# What happens when you are distributed an Incident?

- If you have an email address in your User profile you will be sent an email notification with a <u>link</u> to the incident
- 2. If you have unread distributed incidents
  - An Incident For Review message will appear at the top of your RiskMan system (see example below)

|        | Incident review required!      |
|--------|--------------------------------|
| {      |                                |
| {<br>} | and the second second          |
|        | USER: Fernandez, Brett (Brett) |

- When you click on the link it will take you to the Assigned Incident - Unviewed Listing page. You can open the incident from this page by clicking on the Incident <u>ID</u>.
- Once you have read all your distributed incidents the "Incident review required" message will disappear

## What is the "Bookmark" function?

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

To bookmark an incident, click on the **Bookmark 0** button

|                         |                 | You may make an   | Inc<br>y changes to the for | ident / Ha<br>m that are appro | zard Revie | W<br><sup>1</sup> 'Submit' at the bottom of the pa |
|-------------------------|-----------------|-------------------|-----------------------------|--------------------------------|------------|--|
| Control Panel           |                 |                   |                             |                                |            |  |
| Version Control         |                 |                   |                             |                                |            |  |
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| Last edited by:System I | Manager (Manage | r) on 12 Sep 2016 | 12:29:26                    |                                |            |  |
| Related Item IDs        |                 |                   |                             |                                |            |  |
| 79 <b>80 Ma</b>         | ster            |                   |                             |                                |            |  |
| Actions                 |                 |                   |                             |                                |            |  |
| ✓ Bookmark              | Archive         | Alert Me!         | Change History              | Dist. List                     | Print      | Display as: PDF 🗸                                  |
|                         |                 |                   |                             |                                |            |  |

### How do I view my bookmarked incidents?

All your bookmarked Incidents will be listed in your **Bookmarked Items** I list under the *My Workspace -> Reminders & Alerts* page

- 1. To open the incident click the **Notification Date 2** link
- 2. To remove the bookmark, click the **Bookmark** button on the **Control Panel**

| 🤹 🜍        | My W    | orkspace       | Adm     | inistration  | Reports Help    | Log Out    |                           | USER: Brett Fernandez (Brett                    |
|------------|---------|----------------|---------|--------------|-----------------|------------|---------------------------|---|
| Reminde    | rs      |                |         |              |                 |            |                           |   |
| Dist       | ributio | n Lists: 1     | T.      | Bookmarke    | ed Items: 9 🕕   | Alloca     | ted Actions: 3            | Allocated Journal Actions: 22                   |
| You have b | Days    | arked the folk | owing S | Notification | Reporter's Name | Surname    | Location                  | Summary   |
| Incident   | 1668    | 22 Mar 2006    | 3489    | 6 Mar 2006   | Brett Fernandez | Smith      | ACI                       | rtest   |
| Incident   | 1668    | 22 Mar 2006    | 3491    | 16 Mar 2006  | System Manager  | Smith      | Continence Service        | Fall from bed                                   |
| Feedback   | 1054    | 26 Nov 2007    | 100     | 26 Nov 2007  | Manager         | Whitehouse | Centre Block 6th Floor    | Problems with delay in admission                |
| Incident   | 934     | 25 Mar 2008    | 3751    | 25 Mar 2008  | winter, barb    | Smith      | Centre Block Ground Floor | Pt was aggressive towards staff member          |
| Incident   | 921     | 7 Apr 2008     | 3711    | 5 Nov 2007   | winter, barb    | Smith      | Dietetics                 | fell whilst going to the toilet                 |
| Incident   | 820     | 17 Jul 2008    | 3644    | 26 Sep 2006  | Brett Fernandez | tanner     | Dietetics                 | TEST  |
| Incident   | 416     | 25 Aug 2009    | 3857    | 18 Aug 2009  | winter, barb    | Smith      | Centre Block 2nd Floor    | Client was aggressive towards a staff<br>member |
| Incident   | 402     | 8 Sep 2009     | 3856    | 18 Aug 2009  | System Manager  | Smith      | AC1                       | fell from bed                                   |
| Incident   | 0       | 15 Oct 2010    | 3851    | 11 Aug 2009  | System Manager  | Smith      | CSSD                      | Pressure Ulcer                                  |

## What does the "Alert Me" function do?

The "Alert Me" function, when activated, will notify you of any changes to the incident (except changes to the Journals and Documents).

- To setup a Personal Alert click on the Alert Me 

   button
- Select if you want the Personal Alert to be based on changes to unposted and/or posted incidents @



## Can I print a copy of the incident?

A copy of the current version of the incident can be printed from an opened incident in different formats e.g. PDF

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

|   | Incident / Hazard Rev  | view                                   |
|---|--|--|
| Y                                       | ou may make any changes to the form that are appropriate. Then | click 'Submit' at the bottom of the pa |
| Control Panel                           |  |  |
| Version Control                         |  |  |
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| 79 80 Master                            | •  | •                                      |
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# 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 New Journal Entry 0
- 2. Select a Journal Type from the list 2
- 3. Enter a **description (**

- 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 allocated to field 
     press the Filter button and search for the user.
     You will need to select the user from the Follow-up
     Allocated To field once you have used the filter option
- 5. Press Add Entry 6

| g Journal Entry Webpage Dialog<br>Journal Entry<br>Journal Type Description  | ×   |
|--|---|
| g Journal Entry Webpage Dialog<br>Journal Entry<br>Iournal Type Description  | <u> </u>  |
| j Journal Entry webpage Unalog<br>Journal Type Description   |   |
| Journal Entry<br>Journal Type Description  |   |
| Journal Type Description   |   |
|  |   |
| Further Action 2    Please look into why this incident occurred and what additional training requirements are  | ^   |
| DateStamp:   | ABC .   |
| 12 Jan 2012 🔍 07:39  | <del>.</del>  |
| Journal Follow Up: 24 Jan 2012 🔍 Item Actioned   | I: 🕅  |
| Follow Up Allocated To: brott (boot) - Select User   |   |
|  |   |
|  |   |
|  |   |
|  |   |
| Journals and Actions   |   |
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| Intervals and Actions           Add New Journal Entry           OstCreated Username Entry           OstCreated Username Entry           OstCreated Username Entry           Topic Interval         Description           Allocated To         Follow Up<br>Allocated To         To         Fol  | rnal Item<br>ow Up Actioned<br>Jan<br>2 on<br>I another journal w |

- If the journal is <u>not</u> allocated to a user, it will automatically be actioned once the incident is saved
- If the Journal <u>is</u> allocated to a user, once the incident is submitted an email notification will be sent to the allocated user with details of the Journal and a link to the incident
- If the Journal is not actioned by the due date then an email reminder will be sent to the allocated user as well as yourself

# 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 Incident
- 2. Once you have actioned the Journal it will be removed from this list



### 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>

1. If the list of Journals are collapsed then click on the

Expand icon 🕙 0

- 2. Click on the Action **2** button on the relevant Journal
- 3. Press Yes <sup>(1)</sup> in the pop-up message
- 4. If required add another Journal to enter additional comments that relate to the actioned Journal
- 5. Submit the incident to update your changes

|                |                 |              |                     |  |   |                           | -                               |                                       |  |                       |             |
|----------------|-----------------|--------------|---------------------|--|---|---------------------------|---------------------------------|---------------------------------------|--|-----------------------|-------------|
| 30             | urnals and Acti | ons          |                     |  |   |                           |                                 |                                       |  |                       |             |
| ſ              | Add New J       | ournal E     | ntry                |  |   |                           |                                 |                                       |  |                       |             |
|                | DateCreated     | lleena       | Journal             | Description                              |   |                           |                                 |                                       | Follow Up  | Journal Follo         | v Item      |
| -              | Datecreated     | C at a state | Туре                | Description                              |   |                           |                                 |                                       | Allocated To   | Up                    | Actione     |
| ¥              | 12 Jan 2012     | Manage       | Further<br>Action   | Please look into w                       | hy this incident occur<br>needed. If required | add anothe                | at additional with              | I training                            | brett  | 24/01/2012            | False       |
| -              | 1               |              | Action              | requirements are i                       | meeded: 11 required                           | and anothe                | i journar mu                    | your commence                         | ·  | -                     | -           |
|                |                 |              |                     |  |   |                           |                                 | Has th                                | ID:4<br>is Journa<br>Action<br>Yes<br>No<br>e: Actioning i | 3<br>al Item b<br>ed? | een         |
| 30             | urnals and Acti | ons          |                     |  |   |                           |                                 |                                       | X  |                       |             |
|                | Add New J       | ournal E     | ntry                |  |   |                           |                                 |                                       |  |                       |             |
|                | DateCreated     | Usernai      | me Journal<br>Type  | Description                              |   |                           |                                 | 1                                     | Follow Up<br>Allocated To                                  | Journal Follow<br>Up  | Actione     |
| *              | 12 Jan 2012     | Manage       | r Further<br>Action | Please look into w<br>requirements are i | hy this incident occu<br>needed. If required  | rred and wh<br>add anothe | at additional<br>r journal with | training<br>your comments             | brett  | 24/01/2012            | False       |
| 3              | ournal Type:    |              | Further Actio       | 'n                                       | DateStamp:                                    | 12                        | Jan 2012 07                     | 39                                    |  |                       |             |
| I۵             | escription:     |              | Please look         | into why this incider                    | nt occurred and what                          | t additional              | training requ                   | irements are ne-                      | eded. It required  | add another j         | ournal with |
| I.             | ournal Follow U |              | 24 Jan 2012         |  | Item Actioned:                                | 2.                        | Action                          |                                       | Follow Up Alloca   | ted To: brett (       | brett)      |
| 1,             | mount           |              | 0                   |  | acconnectioned:                               | <b>N</b> 0                | ACCION                          | · · · · · · · · · · · · · · · · · · · | опон ор мноса  |                       |             |
| L <sup>2</sup> |                 | -            | ~                   |  | Created By: System                            | n Manager i               | (Manager) at                    | 12 Jan 2012                           |  |                       |             |
|                |                 |              |                     |  |   |                           |                                 |                                       |  |                       |             |

## Can I attach a file to an Incident?

Relevant files of any description can be attached to an Incident via the **Documents** section e.g. documents, photos

- 1. Press the Add Document <sup>1</sup> button
- 2. Enter a **description 2** of the file
- 3. Press Browse <sup>6</sup> to locate the file
- 4. Once selected press Add ④
- 5. Repeat steps 1-4 if more files need to be attached
- 6. Press Close 6

# **CRLDatix** RISKMAN REFERENCE GUIDE FOR LINE MANAGERS - REVIEWING INCIDENTS



|     |    |               |       |       |          |                       |         |              |             |        |                    |                  | Close   |              |                    |
|-----|----|---------------|-------|-------|----------|-----------------------|---------|--------------|-------------|--------|--------------------|------------------|---|--------------|--------------------|
|     |    |               |       |       |          |                       |         |              | Review      | His    | tory               |                  |   |              |                    |
|     |    |               |       |       |          |                       |         |              | Date        |        | User               |                  | Notes   | Delegated By |                    |
|     |    |               |       |       |          |                       |         |              | 14 Aug 2006 | 10:10  | winter, barb (bar  | b)               | Created the incident.   |              |                    |
| _   |    |               |       |       |          |                       |         |              | 14 Aug 2006 | 10:10  |                    |                  | Risk Manager Email SENT.  |              |                    |
|     | 10 | Mar Mar       |       |       |          | and the second second |         | interation . | 14 Aug 2006 | 10:10  | hayden, anne (a    | nne)             | Manager Email SENT.   |              |                    |
|     | •  | HA MO         | noper | ue    | ra Di    | ADDIN KITC            | Acrinic | increased.   | 14 Aug 2006 | 10:10  |                    |                  | Email sending process after initial   |              |                    |
|     |    |               |       |       |          |                       |         | _            | 14 414 2004 | 10.12  | handen anna (a     |                  | incident entry was successful.  |              |                    |
|     |    |               |       |       |          |                       |         |              | 14 Aug 2006 | 10,19  | neyven, anne (a    | (Manager)        | Incodent first viewed.  |              |                    |
| 2   |    | 1             |       | R     | 6        | ስ 🗖                   | i mì    |              | 15 Aug 2006 | 12:42  | System Manager     | (Magager)        | Unposted incident adited.   |              |                    |
| -6  | 8  | ~             |       | 0     | Ч        | _                     |         |              | 15 Aug 2006 | 13:43  | System Manager     | (Manager)        | Incident posted.  |              |                    |
|     |    |               |       |       |          |                       |         |              | 15 Aug 2006 | 13-43  | Scott D. Faler (Sc | ott Faler)       | User Alerted.   |              |                    |
|     |    |               |       |       |          |                       |         |              | 15 Aug 2006 | 15:18  | Scott D. Esler (Sc | ott Esler)       | User Alerted.   |              |                    |
|     |    |               |       |       |          |                       |         |              | 17 Aug 2006 | 16:26  | Line manager (b    | rett) (LM brett) | Email SENT: Distribution List   |              |                    |
|     |    | Lower Barriel |       |       | and her  | Station 1             |         |              | 17 Aug 2006 | 16:26  | hayden, anne (a    | nne)             | Email SENT: Distribution List   |              |                    |
| -9  | a  | carini neso   | ct 10 | enge  | up by    | ande cono             |         |              | 22 Aug 2006 | 14:50  | Line manager (b    | rett) (LM brett) | Incident first viewed after being   |              |                    |
|     |    | Archived      | í.    | Dist  |          | D                     | Group   | Indiant      |             |        |                    |                  | assigned on winter, barb (barb)'s<br>distribution list.   |              |                    |
|     |    |               |       |       |          |                       |         |              | 22 Aug 2006 | 14:50  | Line manager (a    | nne) (LM anne)   | Unposted incident edited.   | Line manager | (brett) (LM brett) |
|     |    |               |       |       |          |                       | × ×     |              | 22 Aug 2006 | 14:51  |                    | (                | Risk Manager Email SENT.  |              |                    |
| e i |    | Yes           |       | None  | <b>—</b> | 2761                  | 3696    | 12 Nov 2     | 8 Aug 2008  | 11:37  | Brett Fernandez    | (Brett)          | User Alerted and Email SENT, Alert  |              |                    |
|     |    |               |       |       | ~        | <u> </u>              |         |              | 22 6        | 11.00  | Bank Francisco     | (Beeth)          | Email CENT, Dishibuting Link d  |              |                    |
| ~   | ÷  |               |       | None  |          | 3742                  | 3739    | 12 Nov 2     | en nah soon | *****  | press remainses    | (mean)           | A series of the |              |                    |
|     |    |               | -     | -     | -        |                       |         |              |             |        |                    |                  | Emails  |              |                    |
| 2   | æ  | Yes           | ^     | None  |          | 3741                  | 3739    | 12 Nov 2     | 16 Oct 2008 | 13:42  | Duncan, Helen (1   | hduncan)         | On distribution list created by   |              |                    |
| ~   |    |               |       |       | -        |                       |         |              |             |        |                    |                  | bystem Manager (Manager): Incider   |              |                    |
| 먼   |    | 183           |       | NOTE  |          | 3739                  | 193591  | 12 NOV 2     | 6 Nov 2008  | 10.75  | Contario Managara  | (Manager)        | thereafted incident edited  |              |                    |
|     |    | Ves           |       | tions |          | 3338                  |         | 17 Nov 1     | 6 Nov 2008  | 10:38  | System Manager     | (Manager)        | Most recently viewed.   |              |                    |
|     | ~  | 1.44          |       |       | ш        | 47.35                 |         | 1420 -       | 5 Nov 2008  | 10:38  | System Manager     | (Manager)        | Unposted incident edited.   |              |                    |
| 8   |    | Yes           |       | None  |          | 3737                  | Masher  | 12 Nev 2     | 6 Nov 2008  | 10:38  | System Manager     | (Manager)        | Posted incident edited.   |              |                    |
| -   |    |               |       |       | -        | and c                 |         |              |             |        |                    |                  |   |              |                    |
| ×   | ٠  | Yes           |       | None  |          | 3732                  | 3737    | 31 Mar 2     |             |        |                    |                  |   |              |                    |
|     |    |               |       |       | -        |                       |         |              | lourna      | I Hi   | etory              |                  |   |              |                    |
| ~   | ۰  | Yes           |       | None  |          | 3732                  | 3595    | 14 Nov 2     | Journa      |        | atory              |                  |   |              |                    |
|     |    |               |       |       |          | _                     |         |              |             |        |                    |                  |   |              |                    |
| 2   | ÷  |               |       | 1     | U.       | 3705                  |         | 11 Nov 2     | Date        |        | User               | Notes            |   |              |                    |
|     |    |               |       |       |          |                       |         |              | 14 Aug 2006 | 5 10:1 | 7 baydeo, anne (   | anne) Action Ta  | aken  | thi          | is is action taken |

### To view an attached document

- Click on the View button next to the document you wish to view
- 2. The **Document Review History 2** (viewed by clicking

on the *left* icon next to the respective document) will display in the Document Details pop-up window

| Add De   |  |  |                                     |   |
|--|--|--|-------------------------------------|---|
|  | ocument  |  |                                     |   |
| Attache  | d Documents  |  |                                     |   |
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| Document   | ID: 500001   | Att  | ached By : System Manager (Manager) | Data Attached - 6 May 201   |
| ocument Na   | me : Intro to RM for Sta   | ff.pdf   | Size (KB) : 1290                    | Attached To : Incidents   |
| Document Na  | me : Intro to RM for Sta   | iff.pdf  | Size (KB) : 1290                    | Attached To : Incidents   |
| Document Na<br>Descript  | me : Intro to RM for St  | aff.pdf  | Size (KB) : 1290                    | Attached To : Incidents<br>Incidents ID : 46                            |
| Document Na<br>Descript<br>ansmit To VM  | me : Intro to RM for Sta<br>ion : Intro2RM   | off.pdf  | Size (KB) : 1290                    | Attached To : Incidents<br>Incidents ID : 46                            |
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| Document Na<br>Descript<br>ansmit To VM  | me : Intro to RM for St:<br>ion : Intro2RM<br>IIA :  | iff.pdf  | Size (KB) : 1290                    | Attached To : Incidents<br>Incidents ID : 46                            |
| Document Na<br>Descript<br>ransmit To VM<br>eview H<br>ate                                 | me : Intro to RM for St.<br>ion : Intro2RM<br>IIA : T<br>History<br>User   | Action   | Size (KB) : 1250                    | Attached To : Incidents<br>Incidents ID : 46                            |
| Document Na<br>Descript<br>ransmit To VM<br>eview H<br>ate                                 | me : Intro to RM for Str<br>ion : Intro2RM<br>MIA :<br>History<br>User<br>48 System Manage                             | Action   | Size (KB) : 1290                    | Attached To : [ricients<br>Incidents ID : ]46                           |
| Document Na<br>Descript<br>Nansmit To VM<br>Eview H<br>ate<br>Mar 2012 14:<br>Jun 2012 11: | me : Intro to RM for St:<br>ion : Intro2RM<br>IIA :<br>User<br>48 System Manage<br>System Manage                       | Action r (Manager) Document (Manager) Document       | Size (KB) : 1290                    | Attached To: Incidents<br>Incidents ID: 46                              |
| Document Na<br>Descript<br>ransmit To VM<br>eview H<br>ate<br>Mar 2012 14::                | me : Intro to RM for Ste<br>ion : Intro2RM<br>IIA :<br>History<br>User<br>48<br>System Manage<br>System Manage         | Action<br>(Manager) Documen<br>(Manager) Documen     | Size (KB) : 1290                    | Attached To: [Incidents<br>Incidents ID: 46                             |
| Document Na<br>Descript<br>ransmit To VM<br>eview H<br>ate<br>Mar 2012 14:                 | me : Intro to RM for Str<br>ion : Intro2RM<br>UIA :<br>UIS <b>COTY</b><br>User<br>48 System Manage<br>24 System Manage | Action<br>r (Manager) Documen<br>(Manager) Documen   | size (KB) : 1290                    | Attached To: Incidents<br>Incidents ID: 46                              |
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## How do I know which incidents I have viewed and those modified since I last viewed them?

Next to each incident on your incident list there is a coloured eye which represents your viewing status of your incidents

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

### To view the Review History of an incident

- 1. Click on the Eye next to the incident
- 2. The **Review History** will display. This information will enable you to see if there were changes made to the Incident & Journals that you were perhaps waiting on

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

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

- Click on the Change History 

   button in the Control
   Panel of the opened Incident
- The Incident Edit History window will open displaying the changes by version or by field ②. You will only be able to view the changes on fields that you have permission to view in the Incident

**Note:** The Incident Edit History will not display any changes to Journals or Document as there is no history. Only the current versions of the Journals and Documents are available on any version of an Incident

| ſ  | C Incident          | Change History Webp   | age Dialog          |               | _                     | <b></b> X |   |
|--|---------------------|-----------------------|---------------------|---------------|-----------------------|-----------|---|
|  |                     |                       | Incident            | Edit History  | v                     |           | 2 |
|  |                     |                       |                     |               | ,                     | Close     |   |
|  | Ch                  | humanian 🔍 chara      |                     |               |                       | ,         |   |
|  | Version 1           | Created by Suite      | m Manager (Manager) |               | Date: 6 Nov 2008 10-1 | -         |   |
|  | Version 2           | Created by Bratt      | Fernandez (Brett)   |               | Date: 7 Nov 2008 13:  | 15        |   |
|  | Version 3           | Created by Syste      | m Manager (Manager) |               | Date: 20 Aug 2009 16  | 151       |   |
|  | Version 4           | Created by winte      | , hash (hash)       |               | Date: 24 Aug 2009 12  | 34        |   |
|  | Version 5           | Created by Brett      | Fernandez (Brett)   |               | Date: 24 Aug 2009 12  | :36       |   |
|  | Version 6           | Created by Syste      | m Manager (Manager) |               | Date: 1 Sep 2009 15:  | 32        |   |
|  | Version 7           | Created by Syste      | m Manager (Manager) |               | Date: 1 Sep 2009 15:  | 36        | 1 |
|  | Version 8           | Created by Syste      | m Manager (Manager) |               | Date: 4 Dec 2009 11:0 | 07        |   |
|  | Version 9           | Created by Syste      | m Manager (Manager) |               | Date: 4 Dec 2009 11:  | 10        |   |
|  | Walue has           | channed for Date of B | inth                |               |                       |           |   |
|  | Origin              | Version:              |                     |               |                       |           |   |
|  | Versio              | n 4:                  | 1 Jan 19            | 60            |                       |           |   |
|  | Value has           | changed for Age       |                     |               |                       |           |   |
|  | Origina             | Version :             |                     |               |                       |           |   |
|  | Versio              | 14:                   | 48                  |               |                       |           |   |
|  | Value has           | changed for Employee  | Location            |               |                       |           |   |
|  | Ongin               | Version:              | 101                 |               |                       |           |   |
|  | Versio<br>Value has | changed for Job Title | AUL                 |               |                       |           |   |
|  | Origin              | Version:              |                     |               |                       |           |   |
|  | Versio              | 51                    | Nurse               |               |                       |           |   |
|  | Value has           | changed for Type Of E | mployment           |               |                       |           |   |
| You ma   | Origin              | Version:              |                     |               |                       |           |   |
|  | Versio              | 121                   | Full-Time           | Permanent (1) |                       |           |   |
| Control Danal                                  | Value has           | changed for Type Of E | mployee             |               |                       |           |   |
|  | Versio              | a 2                   | Annestic            | re (12)       |                       |           |   |
| Version Control                                | Value has           | changed for Reporter' | s Position          |               |                       |           |   |
| << <   | Origina             | Version               |                     |               |                       |           |   |
| Last added by Custom Manager (Manager) as 45   | Versio              | 12:                   | Acting Ch           | narge Nurse   |                       |           |   |
| Last edited by: System Manager (Manager) on 12 | Value has           | changed for Treatmen  | t Given             |               |                       |           |   |
| Related Item IDs                               | Origin              | Version:              |                     |               |                       |           | Ŀ |
| 79 80 Master                                   |                     | 0                     |                     |               |                       |           | 1 |
| Actions  |                     |                       |                     |               |                       |           |   |
| ✓ Bookmark Archive Ale                         | rt Me!              | Change History        | Dist. List          | Print         | Display as: PDF       | V         |   |

# If I have finished working on an incident, how do I hide it from my Incident List?

If you have completed your investigations and no longer require the incident to be shown in your "Entered Incidents" list, you can **"Archive"** the Incident, either from an opened incident or from your Entered Incidents page

### To archive an Incident from an opened Incident

- 1. Click on the Archive **0**
- Once archived a tick will display next to this button, an entry will be added to the Review History of the incident and it will be hidden from your Entered Incidents list

|                                    | Incident Review  |                                       |
|------------------------------------|--|---------------------------------------|
|                                    | You may make any changes to the form that are appropriate. Then cli-   | ck 'Submit' at the bottom of the page |
| Control Panel                      |  |                                       |
| Version Control                    |  |                                       |
| I<< <                              | There have been no edits.  | > >>1                                 |
| Last edited by:System Manager      | (Manager) on 12 Nov 2014 14:56:39  |                                       |
| Related Item IDs<br>3696 Master 36 | 97 13763   |                                       |
| Actions                            | U  |                                       |
| Bookmark 🖌 🖌 Arcl                  | ive Alert Mel Change History Dist. List Print Preview Display as: P  | DF 🔽                                  |
| and the same state and             | and the second second descent descent and the second second second second second second second second second s |                                       |

### To archive Incidents from your Entered Incidents page

- Check mark 
   the incident(s) that you would like archived
- 2. Press the **Archive** icon **2**. The incident(s) will be hidden from your Entered Incidents List

| 0     |     | 1                    | 🕅 🔗 🖄 🖀 🏛 Entered Incidents 🕸 |           |       |           |        |               |  |                    | 1                         |                  |                       |     |                |   |
|-------|-----|----------------------|-------------------------------|-----------|-------|-----------|--------|---------------|--|--------------------|---------------------------|------------------|-----------------------|-----|----------------|---|
|       |     |                      |                               |           |       |           |        |               |  |                    |                           |                  |                       |     |                |   |
| Dragi | COI | umn near<br>Archived | sar na                        | re to gro | xp or | /that cou | Gan    | Invident Date |  | Incident Incolored | Same I                    | Farith:          | Intelies              |     | 0 frame        |   |
|       |     |                      |                               |           |       |           |        |               |  | Distance L. C. C.  | 2                         |                  |                       |     | conto a.       |   |
| ×     |     | Yes                  |                               | None      |       | 3671      | Hester | 1 Aug 2012    |  | Pelient/Client     | Pt was violent towards    | Acacia Private   | AC3                   |     | ISR 2 HIGH     | - |
| e/    |     | Yes                  | 8                             | None      |       | 3669      |        | 1 Aug 2012    |  | Pelient/Client     | Polient hit the staff me  | Acacia Private   | East Block 2nd Roor   |     | ISR 4 HDIOR    |   |
| ×     |     |                      | 8                             | None      |       | 31.       | Nate:  | 1 /102 2012   |  | Petient/Client     | Pt fell from bed and Fra- | Acacia Private   | Centre Block 2nd Floc | ×   | ISR 2 HIGH     |   |
| 8     | 10  |                      |                               | None      |       | 2165      |        | 31 34 2011    |  | Patient/Client     | Patient fell resulting in | Eucelyptus Lodge | Consulting suites     |     | ISR 4 HINOR    |   |
| 1     |     |                      | 8                             | z         |       | 3663      |        | 21 Feb 2012   |  | Patient/Client     | Client appressive tower   | Acacia Private   | Centre Block 7th Floo | e . | ISR 5 NEAR MIS | 5 |
| ×     |     | Tes                  | 8                             | None      |       | 3649      |        | 9 Feb 2012    |  | Patient/Client     | patient had a fel         | Eucelyphis Lodge | Centre Block 3rd Floo | 4   | ISR 2 HIGH     |   |
| 1     | 8   |                      | 8                             | None      |       | 2625      |        | 6 Feb 2012    |  | Pelient/Client     | Incorrect close of medic  | Acecie Privete   | Centre Block 6th Floo | đ   | ISR + HENOR    |   |
| 8     | ۰   |                      |                               | None      |       | 3631      | Haster | 3 reb 2012    |  | Staff Nember       | Became aggressive tow     | Acecie Private   | Centre Block 3rd Floo | 4   | ISR 3 HEDJUM   |   |
| -     | 8   |                      |                               | None      |       | 2622      |        | 17 Aug 2011   |  | Pelient/Client     | Petient fell in shower    | Acecie Privete   | Centre Block 1st Floo | r   | ISR + MDIOR    |   |
| 1     |     |                      |                               | Nene      |       | 2612      |        | 11 Jun 2011   |  | Cient              | Petert incurred excession | Acecie Privete   | Day procedure unit    |     | ISR 4 MINOR    |   |

## How do I view an incident I have archived?

Enter Selection Settings by clicking on the



- 2. Click Show Archived 2 and press Apply Settings 6
- An Archived <sup>(2)</sup> column will display, indicating which incidents have been archived. Archived incidents can still be opened and modified if required

| 0    |      | 1          | П       | °        | ළු        | Entered Incidents     Shows insidents entered by you or anyone reporting to you, or that have     been 'Distributed' to you. |              | ٥ |            | Ø   | 5    |
|------|------|------------|---------|----------|-----------|--|--------------|---|------------|-----|------|
|      |      |            |         |          |           |  |              |   |            |     |      |
| 0.20 | a co | iumn hear  | cer her | a to gro | up by the | Selection Settings   | ×            |   |            |     |      |
|      |      | Archived   | 0       | Dist     |           | Selection Settings   |              |   | Outcome    |     |      |
|      | ۰    | Yes        |         | None     | . 22      | Display: Entered incidents V   |              | 1 | _          |     |      |
| 2    | æ    |            |         | None     | 22        | Date Entered: From - To -  |              |   |            |     |      |
|      | æ    | Yes        |         | None     | 22        | Incident Date: From To   | sk 7th Floor |   |            |     |      |
| 1    | æ    | Yes        |         | None     | 22        | Date Entered in RiskMan: From To   | k 1st Floor  |   |            |     |      |
| 8    | æ    | Yes        |         | None     | 22        | Incident IDs: 2  | ion          |   |            |     |      |
|      | æ    | Yas        |         | Nona     | 22        | Show Archived:   |              |   |            |     |      |
| ×    | æ    | Yas        |         | Nona     | 22        | Allow rows to expand vertically.   | 1st Floor    |   |            |     |      |
| 2    | æ    | Yes        |         | None     | 22        | Apply Settings 3   | 4th Floor    |   |            |     |      |
|      | æ    |            |         | 1        | 32        |  |              |   |            |     |      |
| 1    | æ    | Yes        |         | None     | 22        |  | k 5th Floor  |   | ISR 1 SEVI | ERE |      |
|      |      |            |         |          |           | Clear Layout   |              |   |            |     |      |
|      | 1001 | ds Found I | (Page 1 | of 201   |           |  | 110          |   | 44 4 3     |     | > >> |

## What is a Linked Incident?

A linked incident is one involving more than one person in the same event e.g. an aggression incident

### Linked incidents can be created 3 ways

- After the first incident is submitted, by clicking on the "Click here to create a linked incident" button on the Incident Confirmation page
- 2. From the "Entered Incidents" page by checking the incident you wish to link from, and pressing the **"Clone**

and Link" icon which will open a copy of the incident

3. If the incidents were entered separately they can be

linked together using the **"Link Records"** icon on the "Entered Incidents" page

### How can I tell if an incident has been linked?

To identify an incident is part of a linked incident you will need to show the **"Group"** column on your **Entered Incidents** list

- 1. Press the Change Columns **0** icon
- 2. Check mark "Show" 2 next to the Group Column Label
- Press Save (at the top of the Change Columns window)
   (3)



# How do I create a linked incident from an existing incident?

If you need to create a linked incident from an existing incident

- On the Entered Incidents page, click on the Record Selector ① next to the incident you wish to create a linked incident with
- 2. Press the Clone and Link <sup>2</sup> icon

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- A copy of the incident will open with some fields/sections cleared e.g. "Who Was Affected" section. Make any changes to the incident as required and press Submit
- If you then need to create another linked incident after submitting the incident press the "Click here to create a linked incident" button on the Incident Confirmation page

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

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

- Click on the **Record Selector 1** next to the incident you wish to link to
- 2. Press the Link Records 🛛 icon



- 4. Repeat step 3 if more incidents are to be linked
- Click on the Promote to Master 
   button next to the incident that will be the master incident
- 6. Press Close 6

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### How do I dissolve a set of linked incidents?

In some cases, users will link incidents that should not have been linked e.g. A resident has had 3 falls in the one day but they all occurred at different times

- Click on the Record Selector 

   next to one of the incidents in the link
- 2. Press the Link Incidents 2 icon
- 3. Either press **Exclude (s)** next to the incident that needs to be removed or press **Dissolve Group (4)** if you wish to dissolve the entire linking
- 4. Press Close 6



# How do I check that I have the right staff reporting to me?

Refer to the **Manager/Staff Relationships Guide** accessible via the menu *Help -> RiskMan Quick Guides -> Manager/Staff Relationships Guide* 

### What happens if I go on leave?

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