### 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** victor 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

Feedback	Management * Administration * Repirts * Help * Log Out Feedback Module Outstanding Tasks	Shortcuts	•
Incidenta Reporting	Bookmarkad Records Go To	x your	Medication error - 1W
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Managing Risks	1 Distribution list is listed	Troky	Winstinuary
	Incidents by Facility	Incident	

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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Review His	story					
Date 🔺	User 0	Notes				
8 Feb 2010 11:15	Nurse, Mary (Nurse)	Created the incide	int item.			
			1			
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#### 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 ③ 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 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
- On the Unposted Feedback Entry Review page, select 'yes' for Related to Incident? 0
  - 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 6

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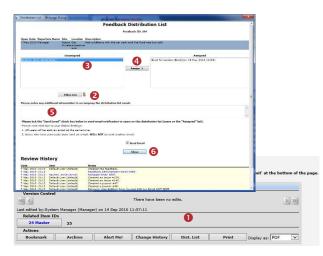
# How do I let others know of the feedback?

Centra South West

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
- 3. Highlight the user in the Unassigned List <sup>(6)</sup> and press Assign <sup>(4)</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 1** button

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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**

D	listribul	tion Lists: 0	1	Boo	kmarked Items: 29		Allocated Acti	ons: 2	Allocated Journal Actions: 4	ŋ
You have	bookm	arked the folk	owing 2	2						
Type	Days	Assigned	ID	Notification Date	Reporter's Name	Sumame	Location	Summary		
Incident	1764	14 Dec 2005	3411	23 Sep 2005	Knoblauch, Kim	Garde	Day procedure unit	Pt hit staff memebe	r while giving medication	
Incident	1758	20 Dec 2005	3427	24 Nov 2005	Mr. Manager	etent	Dietetics	test		
Incident	1685	3 Mar 2006	3466	10 Feb 2006	winter, barb	Smith	Centre Block 2nd Floor	Pt was administered	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	text	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 towards	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	audf	Day procedure unit	asfd		
Feedback	747	26 Sep 2008	163	23 Jul 2008	Manager	Smith	Centre Block 5th Floor	Problem with the ad	mission process	
Feedback	747	26 Sep 2008	169	11 Sep 2008	Manager	Smith	AC1	Not happy with the	witing time for the appointment	
Feedback	747	26 Sep 2008	122	1 Feb 2008	Manager	Smith	Continence Service	Problem with the ad	mission 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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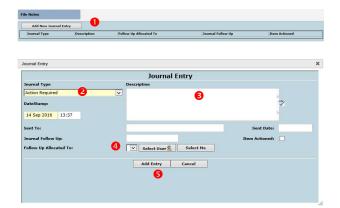
# How do I add a Progress/File Notes or assign a task?

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 8** 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 <sup>(a)</sup> press the Filter <sup>(b)</sup> 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

teminde	rs					0
Dist	ribution Lists: 1	Book	marked Items: 9	Alloca	ited Actions: 3	Allocated Journal Actions: 22
You have	outstanding Journal Ac	tions for the fol	lowing 22 items:	2		
1 PR	Days	Action Due By	ID Journal Creat		Summary	
		Action Due By	ID Journal Creat		Summary Please look into this on	•
Feedback	No Due Date			or Created		
Feedback Feedback	No Due Date No Due Date	No Due Date	162 Manager	or Created 29 Jul 2008	Please look into this on	•
Feedback	No Due Date No Due Date	No Due Date No Due Date 21 Aug 2006	162 Manager 217 Manager	or Created 29 Jul 2008 20 Aug 2010	Please look into this on Please look into this on this is action to be take	a on 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 **actioned.** To action a journal task follow the below steps:

Press the Action 

 button next to the respective
 Journal

Add New Jour	sal En	try					
DateStamp	Journ	al Type	Description		Journal Username	Follow Up Allocated To	Item Actioned
24 Apr 2017 10:31	Actio	n taken	Please action the fol	lowing task	Manager	Manager	False
Journal Type:		Action taken		DateStamp: 24	Apr 2017 10:31	Reference:	
Description:		Please action th	he following task		•		
Follow Up By D	ate:			Item Actioned:	Action	Follow Up Allocated Syste To:	sm 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

Action Journal	ж
Journal ID: Not yet saved Has this Journal Item been Actioned?	
Yes	
Cancel	
Note: Actioning is immediate.	

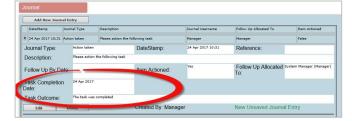
#### If you see this message click 'yes' to action the journal

#### **Option B**

	Journal ID: Not yet saved is Journal Item been Actior	ned?
Task Completion Date:	24 Apr 2017	
Task Outcome:	The task was completed	/
	Yes 3	
	Cancel	
	Note: Actioning is immediate.	

If you see this message you must fill out two mandatory fields; Task Completion Date **1** and Task Outcome **2** before clicking 'yes' **6** 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**

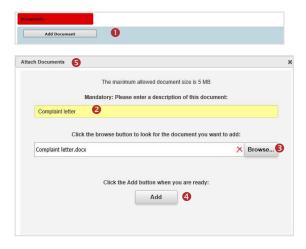


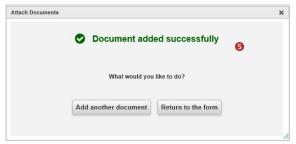
3. Press **Submit** at the bottom of the feedback to update your changes

# 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 <sup>(3)</sup> to locate the file
- 4. Once the file is selected press Add ④
- 5. A pop-up will appear asking if you want to add another document or return to the form **9**





#### To view an attached document

 Click on the View 1 icon next to the document you wish to view Click on the or 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	۲	0	

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

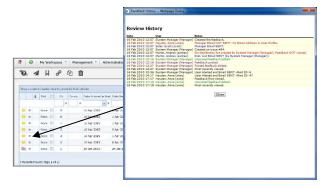
Next to each feedback notification on your feedback list there is a coloured flag which represents your viewing status of your feedback

- 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 fo	rm that are approp	iate. Then clic	k 'Submit' at the bo	tom of t
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ist edited by:System N	lanager (Manage	) on 14 Sep 2016 11:57:11				
Related Item IDe						
Related Item IDs	25					
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 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

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# **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 killing icon next to the attached document a Review History can be viewed

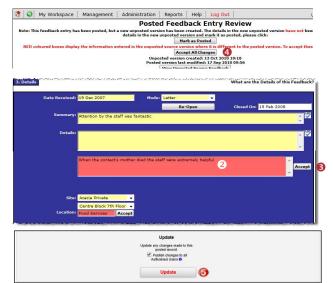
1. If you wish to view changes from the Inbox, click on the Status Flag (as described on the previous page) next to

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

		X - Fee New Feedback	INBO		Ĭ	ථ 🛍	ć	ø	1	2	1	a	0
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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>(3)</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>(3)</sup> button
- 6. Press **Update the Posted Record (5)** 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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ev.		N	une 1		6		10 Apr 2015	1 Apr 2015			Royston			Health Commission	System Monoper	
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a			one		1		29 Jan 2015	29 Jan 2015			Sile			a	System Monager	

- 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

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			compare source	Them boun	cc.		
Control Panel							
ast edited by:System M	lanager (Manager) :	on 10 Oct 2016 08:38	1:48				
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Feedback Notification							
Date Received *	10 Oct	2016	c	ate Entered in Ri	skMan *	10 Oct 2016	
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Complaint Reopened?	O Ye	s O No					
How was the feedback	received? 💿 Tel	lephone O Email O	Letter O Social Media	In Person	Other		
	• Tel			In Person O	Other		
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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 licon. 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 **1**, select Display = Deleted Feedback **2** and press Apply Settings **3** 

- Check the record selector ④ next to the Feedback (you can select more than one) that you wish to restore
- Press the Restore icon The Feedback will be restored to the "Inbox" view and will be ready for posting

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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 2 icor

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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?

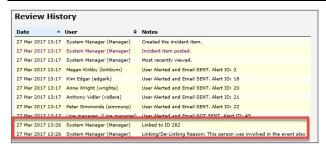
If you find that 2 or more feedback notifications should have been linked but were not



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.

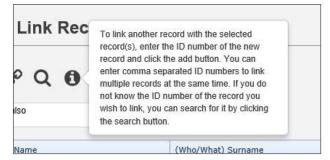




- 3. Click to link the record you entered in 0
- 4. **New**: Search tool helps you find a record so that you don't necessarily need to know its ID number:

			Item Id	
Associated) Division		(Associated) Department/S	ervice	
Who/What) First Name (Conta	ins)	✓		~
Who/What) Surname (Contain	is)			
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 Reference Guides -> Personal Delegates Guide*