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

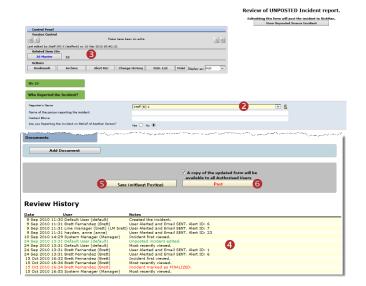
- 1. Press the Vicon on the menu or press ALT-G
- 2. Select Item = Incident and enter the ID
- 3. Press Enter or the Go button
- 4. If you have permission to the incident it will open

NOTIFICATIO	NS	NOTIFICATION REVIEW		REPORTING	
	C Go To			177	
1 🔥	Select an Item	Item Number	Go		
N INCIDENT NEW FEEDBACK	Incident	- 3865	3	INDICATORS INCIDENT REPORTS	
				E E	

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

0	1	A		e (ව 🛍			INBO	X - Incidents		eview				٥	II	Ø.	P
Dag	a opherer	Interior	(bene)	to an own i	w that column													
	4	642		ID.	Notrication Date		Reporters Name		Sumane		Fadilty.		Location		Summary			F
						- 7		7		2					-		_	1
8		Nonc		2702	52 Nov 2364		System Managar	_	Le		Caled Hentington	-	43	_	bally			-
н		Nonc		3741	12 Nov 2014		System Manager		ĸſ		Wattle Private		Centre Black 7th Flaor		sdf			
2		Name:		1211	1 av 2014		System Namejer		ы		Wattle Proste		Centre Maria Del Pinar		sif.			
ß		Num:		3738	22 1814 2384		System Nanagar		sif		Acacos Presile		Administration		4			
ø		Score.		3447	12 90/2014		System Hanager		de .		Cabel Huntington		NC2		dist			
		1		1.026	11 86/2014		Line Manager		stF		Acada Physics		NC2		#d			
en.		None		2204	12 Per 2013		System Manager		Smith		Cabel Hentington		Contro Block Sth Floor		Resident fail	in home		
н		None		3401	6 Her 2013		Default User		Walls in carditoria		Acada Private		Catatoria		Wells appear	to be wat	er danog	ed
	۰	Nonc		2701	8 Feb 2013		System Nemager		arar		Acada Divata		AC3		salidad			
22		None		2692	7 Jan 2013		Default User		Haylon		Acada Nivate		Ward 1F		Fellow			
ß		RLAN:		3925	54 Nov 2012		System Manager		Singh		Acacos Pruste		Fed Black 4th Hoor		Patent here	ан адама	over where	ige.
н		1		3672	5 Aug 2052		Hughler, Annas		Propiers		Acatis Prinde		Fast Black 2nd Floor		Patient bit th	endal me	nter ute	ы.,
н	•	Rome.		3905	1 Aug 2012		Hayden, Anne		Smith		Acada Private		Centre Block 3th Floor		Patient fell re	esulting in a	n sko bee	r.
ß		Road.		.9900	1 Aug 2012		haikes, Laun		knes		tussigns Lodge		Consulting states		Patent fel is	esultrig in e	s sicn bee	r
e,	* 2	2		3963	21 Feb 2012		Anne Haycian		Smith		Acada Private		Contro Diods 7th Floor		Client agenes	sive toward	da the st	а.
\$3	* i	Rose		3675	6 heb 2002		Default User		Smith		Acada Private		Centre Block 6th Floor		Incorrect dos			
-	•	Nonc		2631	3 Feb 2012		Default Usor		Rogers		Acacla Niveto		Centre Black 3rd Floor		Bostanic app			
8	•	None		2622	3 Feb 2012		Default Usor		Smith		Acada Nivete		Contro Block and Floor		Bosarre ago			at.
8		Scen:		3620	17 Aug 2011		Supe, Hary		Smith		Acacis Presile		Centre Morie Del Histor		Palent feller	SHH		
8		Road		3610	11 Jun 2011		Kaner, Hury		Suih		ilicacia Prindat		Day proceeding and		Patient inter	rad manas	an bride	M -



CRLDatix RISKMAN REFERENCE GUIDE TO INCIDENT MANAGEMENT

- To view an incident from the Inbox page, click on the Incident <u>ID</u> 1
- 2. Review the incident and ensure the Line Manager has investigated and reported their findings
 - 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
- 3. If changes are made to the incident, either
 - Press Save without posting ⁽⁵⁾, 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 ③ 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

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

To create a distribution list

- 1. Click on the **Dist List 0** button
- 2. Search for the users using the **Filter List 2** option
- Highlight the user in the Unassigned List ⁽²⁾ and press
 Assign ⁽²⁾
- 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

Distribution List	Webpage Dial	og				X		
		1	Incident Distril	bution List			^	
			Incident ID:	: 10				
			SVDP Facility Description					
27 Apr 2010 00:00	Default user	Vinnies Centres	Altona Rude to th	e staff				
	Unassig	ned			Assigned			
Default user (defa			- 4	Jones, Mary (carer)	(on 27 Apr 2010 16:2)	8)		
Line Manager (Lin System Manager (e Manager) Manager)	8	Assign	>				
Please enter any a distribution list em	Filter Lis dditional inform ail:		any the					
	6		*					
			Send Email &	Close 6				
Review His	story			-				
Date 27 Apr 2010 15:59	User Default uses (d		neated the incident.					
27 Apr 2010 15:59	Default user (d	efault) M	ost recently viewed.	o Email address in their Use	r Profile.			
27 Apr 2010 16:01 27 Apr 2010 16:20	Line Manager (I Line Manager (Line Manager) Ir Line Manager) U	cident first viewed.					
			ost recently viewed. n distribution list created b	y Line Manager (Line Mana	ger): Incident NOT view	ved.		> >>
Bookmar	k	Archive	Alert Me!	Change History	Dist. List	Print Disp	lay as: P	DF V
-					0			

Can I view the comments sent in a Distribution List?

The Comments sent on any distribution list can be viewed from the **Review History** of the Incident

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

Review	History		out some more	Distribution E-MABi Text. Brett Femandaz (Brett) System Manager (Manager) 3842 please follow-up with Mary and find details about this accident. Could you	5
Date	User	Notes		inter the information into a Journal. I ied once you have added the journal	
16 Feb 2010 0 16 Feb 2010 0 16 Feb 2010 0 16 Feb 2010 0	9:32 System Manager (Manager) 9:32 9:32 Hayden, Anne (anne) 9:32 Esler, Scott (scott) 9:33 Daniel, Sharee (sharee) 9:33 Daniel, Sharee (sharee)	Created the incident. Risk Manager Email SENT. Manager Email NOT SENT: No Email address Manager Email SENT. On distribution list creater by System Man	will be notif	The once you have under one journal	
16 Feb 2010 0 16 Feb 2010 0 16 Feb 2010 0 16 Feb 2010 0 16 Feb 2010 1	9:41 System Manager (Manager)	Email SEITT: Distribution U st S ⁻ Emails User Alerted and Email SEIT. Alert 10: 5 User Alerted and Email SEIT. Alert 10: 12 User Alerted and Email SEIT. Alert 10: 12 Unposted incident edited. User Alerted and Email SEIT. Alert 10: 44 User Alerted and Email SEIT. Alert 10: 45		annual and a second second	>

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)



 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>

RLDatix RISKMAN REFERENCE GUIDE TO INCIDENT MANAGEMENT

 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 - you may be waiting on the Line Manger to investigate the incident.

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

Control Panel											
Version Control											
I<< <		The	re have been no edits.			> >>					
Last edited by:Staff (M	Last edited by:Staff (M) 6 (staffm6) on 16 Mar 2016 09:43:33										
Related Item IDs											
20 Master	23										
Actions											
✓ Bookmark	Archive	Alert Me!	Change History	Dist. List	Print Display as: Pl	DF 🗸					

How do I view my bookmarked incidents?

All your bookmarked Incidents will be listed in your **Bookmarked Items 1** list under the *My Workspace -> Reminders & Alerts* page

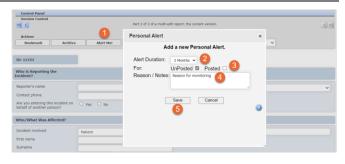
۵	My W	orkspace	Man	agement A	dministration	Reports	Help Log Out	USER: System Manager (Manag
eminde	ers							
Dist	ributio	n Lists: O	Ĩ.	Bookmarke	ed Items: 30 🕕	Ŭ,	Allocated Actions: 2	Allocated Journal Actions: 4
rou have l	bookm	arked the foll	owing 3	10 ite				
Type	Days	Assigned	ID	Notification Date	Reporter's Name	Surname	Location	Summary
Incident	1766	14 Dec 2005	3411	23 Sep 2005	Knoblauch, Kim	Garde	Day procedure unit	Pt hit staff memeber while giving medication
ncident	1760	20 Dec 2005	3427	24 Nov 2005	Mr. Manager	etent	Dietetics	test
ncident	1687	3 Mar 2006	3466	10 Feb 2006	winter, barb	Smith	Centre Block 2nd Floor	Pt was administered the wrong drug
ncident	1687	3 Mar 2006	3454	9 Jan 2006	Mr. Manager	hayden	Consulting suites	distribution list one
ncident	1646	13 Apr 2006	3491	16 Mar 2006	System Manager	Smith	Continence Service	Fall from bed
ncident	1514	23 Aug 2006	3626	23 Aug 2006	System Manager	dummy	Dietetics	test
incident	1500	6 Sep 2006	3638	5 Sep 2006	System Manager	test	Dayton	test
ncident	1352	1 Feb 2007	3648	31 Jan 2007	winter, barb	Smith	CDAMS	fall

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

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 O button
- 2. Select the **duration 2** of the Personal Alert
- 3. Select if you want the Personal Alert to be based on changes to **unposted** and/or **posted** incidents **S**
- 4. Add a **Reason / Note** why you are adding the Personal Alert. This is not mandatory **4**
- 5. Press Save 6



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 2

Control Panel									
Version Control									
I<< <	There have been no edits.	> >>1							
Last edited by:Staff (M) 6 (staffm6) on 16 Mar 2016 09:43:33									
Related Item IDs		-							
20 Master	23	0							
Actions									
✓ Bookmark	Archive Alert Me! Change History Dist. List	Print Display as: PDF 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

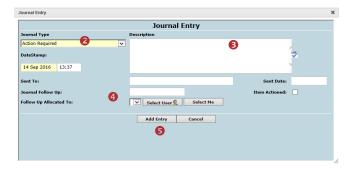
To add a Journal

- 1. Press Add New Journal Entry 0
- 2. Select a Journal Type from the list 2
- 3. Enter a description 6
- 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 **(**)
 - 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

File Notes				
Add New Journal Entry				
Journal Type	Description	Follow Up Allocated To	Journal Follow Up	Item Actioned



RISKMAN REFERENCE GUIDE TO INCIDENT MANAGEMENT



- 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 O date link to open the Incident
- 2. Once you have actioned the Journal it will be removed from this list

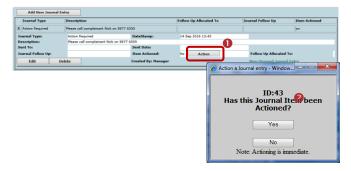


How do I action a Journal?

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>

- Press the Action

 button next to the respective
 Journal
- A pop-up will appear asking if the journal item has been actioned. Select yes. ²
- 3. Press **Post** or **Save without Posting** to update your changes



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 1 button
- 2. Enter a **description 2** of the file
- 3. Press Browse ⁶ 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

_	ocuments								
	Add Docum	ient							
_									
_									
ē	Attached Docum	ents Webpage Dialo	og					×	
	Close	6							
Г	Attached Documents								
	 To attach documents, browse the document and click the "Add" button below. To view the document's detail, click the Document ID. 								
			the Document ID. lick the corresponding	"View" button.					
4	. To delete an a	ttached document, cli	ck the corresponding	"Delete" button locate	ed at the end o	the row.			
L F									
	Document ID	Document Name	Description	Date Attached	Attached by	Size (KB)			
				1 State 1 Stat					
	500024	C3379085.jpg	Photo of Bruising	16 Feb 2010 09:28	System Ma	61	View	Delete	
		C3379085.jpg	Photo of Bruising	16 Feb 2010 09:28	System Ma	61	View	Delete	
2	500024 Description :	C3379085.jpg	Photo of Bruising	16 Feb 2010 09:28	System Ma	61	View	Delete	
2		C3379085.jpg		16 Feb 2010 09:28		61	View	Delete	
2	Description :	C3379085.jpg				61	View	Delete	
2	Description :	C3379085.jpg				61	View	Delete	
2	Description :	C3379085.jpg				61	View	Delete	
2	Description :	C3379085.jpg				61	View	Delete	
2	Description :	C3379085.jpg				61	View	Delete	
2	Description :	C3379085.jpg				61	View	Delete	
2	Description :	C3379085.jpg				61	View	Delete	

CRLDatix

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

Document ID	Document Name	Description	Date Attached	Attached by	Size (KB)	U
5000 1	Intro to RM for Staff.pdf	Intro2RM	6/03/2012 2:48:00 PM Sys	item Manager (Manager) 1290 [View Delet
Document [Details Webpage Dialog					
Save	View	Close				
To Open/D	e document's description ownload the document, o t ID : 500001	lick the "View" buttor		anager) D	ate Attach	ed : 6 Mar 201
To Open/D Documen	ownload the document, c	lick the "View" buttor		anager) D		ed : 6 Mar 201 To : Incidents ID : 46
To Open/D Documen ocument Na Descrip	t ID : 500001 ame : Intro to RM for Sta tion : Intro2RM	lick the "View" buttor	:ached By : System Manager (M	anager) D	Attached	To : Incidents
To Open/D Documen	t ID : 500001 ame : Intro to RM for Sta tion : Intro2RM	lick the "View" buttor	:ached By : System Manager (M	anager) D	Attached	To : Incidents
To Open/D Documen ocument N Descrip ansmit To V	ownload the document, of t ID : 500001 ame : Intro to RM for Station : Intro2RM MIA :	lick the "View" buttor	:ached By : System Manager (M	anager) D	Attached	To : Incidents
To Open/D Documen ocument N Descrip ansmit To V	t ID : 500001 ame : Intro to RM for Sta tion : Intro2RM	lick the "View" buttor	:ached By : System Manager (M	anager) D	Attached	To : Incidents
To Open/D Document No Descrip ansmit To V Eview	ownload the document, c tiD : 500001 ame : [Intro to RM for Sta ttion : Intro2RM MIA : History User	lick the "View" buttor ff.pdf Att	Lached By I System Manager (M Size (KB) : 1290	anager) D	Attached	To : Incidents
To Open/D Documen ocument N Descrip ansmit To V	evenload the document, of ED : [500001 ame i [Intro to RM for Stat tion (Intro2RM MIA : History User 148 System Manager	dick the "View" buttor iff.pdf	Iached By I System Manager (M Size (KB) I 1290	anager) D	Attached	To : Incidents

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 Unposted Incident

- The Review History will display if you click on the eye. This information will enable you to see if there were amendments made to the Incident and Journals that you were perhaps waiting on
- 2. It is suggested that you perform a full review of the incident by clicking on the **ID**

Q. 1	a 🛛	°	e		Review History	×	
	n header he deved					tise	
		None		3753	Review History Review History	<u></u>	
V =		Nere			Date • User # Notes		
4 .		None			st hav zon with monthline system readyr (hinter) control the boliver from		
					11 to 4001 Wilds Wild-11.00 Kisk Marapor Back 58% .		
3 *		None		MIN	12 Kov 2001 49 (15 UTC=11:00 Sp.km Temper (Manger) Heal monthly viewed		
1 10		Neese	1	200	32 Nov 2009 90 HS UTC 11:00 Personalise, Debl. (Dnill) Live Alexand and Dnall SD/R. Alexi 10: 34		
	-	Normal State		3737	12 Nov 2014 MILLES ATCHASSING Free Townson-Recent Anne alerted and level sect. Alert Till: 31		
	Yes	None		3730	Structure. Structure.		
		1					
		New					
				200			
					Close		
	Found (Playa)						≪ < 1 ▶

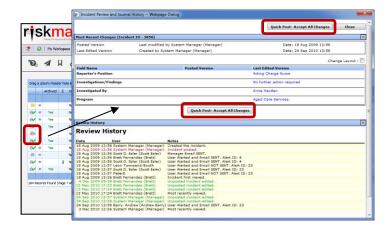
To view the Review History of a Posted Incident

1. In addition to the Review History, a list of changes that have been made after posting will display

Note: Not all the changes will be listed here - the following are not listed Journals; Documents; Classifications; fields from sub-forms.

If you wish to accept the changes and re-post the incident without having to open it, press the Quick
 Post – Accept All Changes button (see example below). The incident will be removed from your Inbox page and will be available on your Posted Incidents page

Note: Accepting the changes means that only the changes displayed in the Quick Post list will be updated into the Posted record. It is recommended that you open the Incident to before re-posting



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 always the most current version

- Open the Incident from the Inbox page and click on the Change History

 button in the Control
- 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



Control Panel		
Version Control		
I<< <	The	re have been no edits.
Last edited by:Staff (M) 6 (staffm6) on	16 Mar 2016 09:43:	:33
Related Item IDs		
20 Master 23		
Actions		
Bookmark Archive	✓ Alert Me!	Change History Dist. List Print Display as: PDF V
		0
E Incident Change History Webpage Diale	pq	
	ncident Edit	Vieton
	incluent call	
		Close
Changes by version O Changes by fie		
Version 1 Created by System Mana	ger (Manager)	Date: 6 Nov 2008 10:56
Version 2 Created by Brett Fernand	ez (Brett)	Date: 7 Nov 2008 13:15
Version 3 Created by System Mana	ger (Manager)	Date: 20 Aug 2009 16:51
Version 4 Created by winter, barb (barb)	Date: 24 Aug 2009 12:34
Version 5 Created by Brett Fernand	ez (Brett)	Date: 24 Aug 2009 12:36
Version 6 Created by System Mana	ger (Manager)	Date: 1 Sep 2009 15:32
Version 7 Created by System Mana	ger (Manager)	Date: 1 Sep 2009 15:36
Version 8 Created by System Mana		Date: 4 Dec 2009 11:07
Version 9 Created by System Mana		Date: 4 Dec 2009 11:10
Value has changed for Date of Birth		
Original Version:		
Version 4:	1 Jan 1960	
Value has changed for Age	1 1011 11000	
Original Version:		
Version 4:	48	
Value has changed for Employee Locatio	n	
Original Version:		
Version 2:	AC1	
Value has changed for Job Title		
Original Version:		
Version 5:	Nurse	
Value has changed for Type Of Employm	ent	
Original Version:		
Version 2:	Full-Time Perman	nent (1)
Value has changed for Type Of Employee		
Original Version: Version 2:	Apprentice (12)	
Version 2: Value has changed for Reporter's Positio		
Original Version:		
Version 2:	Acting Charge Nu	ITSP.
Value has changed for Treatment Given	ricking charge no	
Original Version		

Reviewing & Posting Edited Posted Incidents

After an incident has been posted, it can be edited by staff within the organisation that have permission to the incident e.g. further investigations has revealed that the Severity Rating has changed. Changes made after an incident 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 master incident, or not accept them if you feel that the change should not be part of the master version of the incident

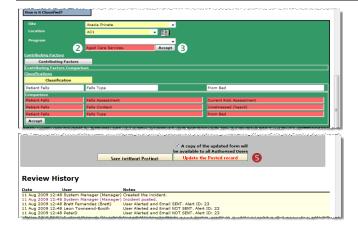
- If you wish to view changes from the Inbox, click on the Status eye (as described on the previous page) next to the edited posted incident (denoted by the income icon)
- Because not all changes are displayed on this page it is strongly recommended that you open the Incident to review all the changes by clicking on the Incident ID 0

0	s	1		М	°	Ĝ	ስ 🏛		INBO		Incidents f		eview				¢			F
Dreg		column	heed	er her	e to gra	up by	thet column													
		8	Dist		1D		NotReation Date		Reporters Name		Sumamo		Facility		Location		Summ	rγ		
						•		• •		7		7		7		7				4
8	4	•	Non	•	257	1	4 Feb 2011		Nurse, Nery		Smith		Acacle Private		Cerdiec Rehab		Steff n	ember i	virt back	ht
	8		Non	•	357	1	4 Feb 2011		System Manager		Jones		Acacla Private		Emergency Department		Visitor	entered	8D in an	int
	8	•	Non	•	356		15 Dec 2012		Tester, Scott		ester						simple	test		
1	9		Non	. 🗆	355		Nov 2012		Nurse, Nary		Smith		Acacla Private		Centre Block 2nd Floor		Sedati	on dose	nat adjus	ked
23	٦	٢	Non	•	354		Sep 2012		Nurse, Hery		Jonas		Acacla Prilvato		Centre Block 7th Roor		Fressu	ne waun	d dagrad	ing
1	1		Non	•	353	z	5 Aug 2012		Nurse, Hery		Smith		Acacia Private		Centre Block 4th Floor		Client	became	aggressir	/e d
-	1		Non	•	353			_	Burne, Mary	_	ester	_	Acacla Prilvaba		Centre Block 1st Ficor		Pt adm	inistered	d extra d	
103	1		Non	•	-	-							cacie Private		AC2		best ag	gression		
8	8		Non	•	349	z	A rec	1 iC	on indio	cate	es the		cacia Prilvate		Day procedure unit		SPECT	1EN LOS	T AFTER	CO
8	a	,	Non	•	249								cacle Private		Centre Block 4th Floor		Pt adm	instered	extre de	œ
							incid	ent	: has be	en	edited									
66 Re	con	ds Fou	nd (P	eçe S	of 7)		<i>c</i> .		sting						Items per page: 10	F	- •	K K 5	•	>»

- 3. All changes will appear in a **red box** 𝔤 under the field (or group of fields) that has been modified
- If you with to <u>accept changes on an individual field</u> press the respective Accept ⁽⁶⁾ or Accept Block button
 - Those changes not accepted will not be included in the master version of the incident but will remain in the unposted version of that incident
- Alternatively, if you wish to <u>accept all changes</u> in the incident press the Accept All Changes ⁽³⁾ button
- 6. Press Update the Posted record ⁽⁵⁾ to save the changes
 - The incident will be removed be removed from the Inbox view and the updated changes will be available to view in the "Posted Incidents" listing

	Review of POSTED incident report.
Note:This re	port is a modification of one that HAS been posted, but these changes have not been accepted yet.
	Mark the source item as posted with no changes.
	View Unposted Source Incident
RE	D boxes contain information from the unposted version, where it varies from the posted.
	Unposted entry made: 26 Nov 2009 11:30
	Accept ALL changes.
	Posted report last modified: 12 Aug 2009 08:57
If you have accepted any	changes or made any modifications on this form, click the "Update the Posted record" button below to save your changes to the posted version of the incident.
Control Deced	
Control Panel Version Control	
	Part 3 of 3 of a multi-edit report, the current version.
Version Control	Part 3 of 3 of a multi-edit report, the current version.
Version Control	
Version Control	ager (Manager) on 12 Aug 2009 08:57:57 anager (Manager) on 26 Nov 2009 11:30:16

CRLDatix[®]

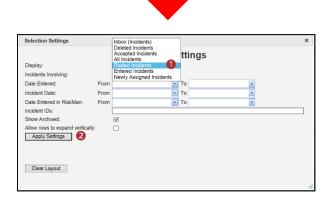


How do I access Posted Incidents?

Posted incidents are accessible by selecting

- Management -> Enquiry -> Posted Incidents or
- By accessing the Selection Settings menu and selecting Posted Incidents ① from the Display listing on any Incident Listing page (see example below) and pressing Apply Settings ②

0	1	1 1	1	P	එ 🛍	INBC	New Incidents and edit				۵ 🗉 🕈	Ę
Dreg	e colum	n heeds	r her	e to grau;	by thet column							
	8	Dist		1D	Notification Date	· Reporters Name	· Sumamo	 Facility 	 Location 		Summary	
					7		•	2	9	2		
8	٠	None		2574	4 Feb 2011	Nurse, Nery	Smith	Acacle Private	Cerdiec Reheb		Staff member hurt beci	k lifti.
-	æ	None		3573	4 Feb 2011	System Manager	Jones	Acacia Private	Emergency Departm	nent -	Visitor entered ED in an	n int.
	*	None		3566	15 Dec 2012	Tester, Scott	ester				simple test	
1	۰	None		3551	6 Nov 2012	Nurse, Nary	Smith	Acacla Private	Centre Block 2nd Fi	oor	Sedation dose not adju	sted.
8	*	None		3545	15 Sep 2012	Nursa, Mary	Jones	Acacle Prilvato	Centre Block 7th Ro	107	Pressure wound degree	ding .
1		None		3537	5 Aug 2012	Nurse, Nery	Smith	Acecie Private	Centre Block 4th Flo	107	Client became appressi	ve d.
-	æ	None		3536	25 Jul 2012	Nutsa, Mary	ester	Acacla Private	Cantra Block 1st Fig	or	Pt administered extra d	155e -
1	æ	None		3503	31 Mar 2012	System Manager	Smith	Acecie Private	AC2		test aggression	
8	æ	None		3497	27 Feb 2012	Nurse, Nary	Smith	Acacla Prilvabe	Day procedure unit		SPECIMEN LOST AFTER	R CO.
8		None		2493	21 Jan 2012	Nurse, Nerv	Smith	Acacle Private	Centre Block 4th Fig	ior	Pt administered extra de	ose



- To view and edit a posted incident, click on the Incident ID, make changes as required and press the Update the Posted record
 button at the bottom of the incident to save your changes
 - The posted incident will be updated directly and a copy of the changes will be made available to the equivalent unposted version. The incident will not re-appear in the Inbox view
- 2. To return to the **Posted Incidents** page

 Click on the Selection Page 2 button Incident or select Management -> Enquiry -> Posted Incidents from the menu

	Compare Source View Source	
Control Panel	2	
st edited by:System Manager	r (Manager) on 10 Oct 2016 08:38:48	
Actions		
Bookmark A	rchive Alert He! Change History Dist. List Print Display as: PDF V	
D: 18		
edback Notification		
ate Received *	10 Oct 2016 Date Entered in RiskMan * 10 Oct 2016	
omplaint Reopened?		
simplaine Reopened?	O Yes O No	
ow was the feedback received	d? Telephone Email Letter Social Media In Person Other	
hich Health Service/Locati	ion does this feedback belong to?	
	ion does this feedback belong to? Ballerat Haabh Services 🔽	
te	Ballarat Hailth Services	
ite scation	Ballarat Hailth Services	
te scation pecialty	Bellarat Health Services V V V	
te scation peciality ervices Provided Group	Ballarat Health Services	
te scation peciality ervices Provided Group	Bellarat Health Services V V V	
ite ocation pecialty ervices Provided Group ervices Provided Type	Bellarat Health Services V V V	~~~~
ite ocation pecialty ervices Provided Group ervices Provided Type	educet Health Services ک ک ک ک ک م الامی م الامی م الا الا الا الا الا الا الا الا الا ال	~~~~
te scation peciality envices Provided Group ervices Provided Type	لی می باد بر می برد. از می ماده می باد بر می برد. از می ماده می مادی می برد. از می ماده می باد بر می برد. از ماده می مادی می برد. از ماده می برد. از ماد می برد. از ماد می برد. از ماده می برد. از ماده می برد. از ماد می برد. از ماده می برد. از ماد می برد. از ماده می برد. از ماد می برد.	~~~
te scation peciality envices Provided Group ervices Provided Type	educet Health Services ک ک ک ک ک م الامی م الامی م الا الا الا الا الا الا الا الا الا ال	~~~
te scation peciality envices Provided Group ervices Provided Type	لی می باد بر می برد. از می ماده می باد بر می برد. از می ماده می مادی می برد. از می ماده می باد بر می برد. از ماده می مادی می برد. از ماده می برد. از ماد می برد. از ماد می برد. از ماده می برد. از ماده می برد. از ماد می برد. از ماده می برد. از ماد می برد. از ماده می برد. از ماد می برد.	
te scation pedalty envices Provided Group envices Provided Type	Andres Health Services	
te scation pedalty envices Provided Group envices Provided Type	Andres Health Services	
te nation pecialty envices Provided Group envices Provided Type Review Histor Date User		
itte acation iportaitty Ienvices Provided Group Ienvices Provided Type Review History		

Features of the Posted Incidents page

Compare Source

This feature allows you to view the current posted version of the incident 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 field that you wish to modify. On saving the incident, the posted version will be updated directly

View Source

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

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

Note: This function is not commonly used

Can I delete an Incident?

Deleting incidents can be done if

- There are duplicate incidents i.e. more than one person has entered the same incident; or
- If the incident being entered is not an incident as per your organizational definition e.g. a staff grievance; Maintenance request.

Before deleting an incident it is suggested that you

RISKMAN REFERENCE GUIDE TO INCIDENT MANAGEMENT

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

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

To delete Incidents

- With either the Incident Inbox or Posted Incidents page open, check the record selector

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

0	1	1 [1	ø	4 🛍	2	INB		cidents and edit					¢ [1	×II	6
Drag	a colur	in heada	rhen	e to grou	p by that column												
	6	Dist		ID	Notification D	ate	Reporters Neme		Sumarme	Fedity		Location		Summery			
					φ	-	<	7		\$	7		Ÿ				
8	٠	None		3574	4 Feb 2011		Nurse, Mary		Smith	Acada Private		Carclac Rehab		Staff mem	ber hu	t beck	m.
		None		3573	4 Feb 2011		System Hanagar		lones	Acadia Private		Emergency Department		Visitor enb	ared El) in an	nt.
		None		3555	15 Dec 2012		Tester, Scott		esler					simple test			
۲		None		3551	6 Nov 2012		Nurse, Hary		Smith	Acadia Private		Centre Block 2nd Floor		Sadation d	ase no	t adjus	eć.
8	۰	None		3545	Sep 2012	- 0	Nurse, Mary		Jones	Acada Private		Centre Block 7th Floor		Pressure to	ound a	tegradi	íg
1		None		3537	5 Aug 2012		Nurse, Hary		Smith	Acadia Private		Cantra Black 4th Ficor		Client becz	rne ag	gressiv	e d.,
M	۰	None		3536	25 Jul 2012		Nurse, Mary		esler	Acada Private		Centre Block 1st Floor		Pt acminis	tered e	stra do	6e
-		None		3513	31 Mar 2012		System Hanagar		Smith	Acada Private		AE2		test aggres	sion		
8	۰	None		3497	27 Feb 2012		Nurse, Mary		Smith	Acada Private		Day procedure unit		SPECIMEN	LOST	AFTER	co
	۰	None		3483	31 Jan 2012		Nurse, Mary		Smith	Acada Private		Cantra Block 4th Floor		Pt adminst	ared e	ctra do:	æ
66 R.	monte G	and (Pe	ce 5.	af 7)								litems per pape: 10		- «·	e :	• 1	

How do I restore a Deleted Incident?

Deleted Incidents are located in the "**Deleted Incidents**" page.

1. From any Incident Listing page, enter Selection Settings

via the icon **1**, select **Display = Deleted Incidents 2** and press **Apply Settings 6**



- Check the record selector ④ next to the incident/s (you can select more than one) that you wish to restore
- Press the Restore ⁽⁵⁾ icon. The incident will be restored to the "Inbox" (and posted version, if applicable) view

4		0	M	y Work	spac	e • Man	agement 🖌 🕴 Administration '	Reports
	°?	3	<i>"</i>	6				
	_							
	Drag	a co		heade		e to group	by that column	
			Ø	Dist		ID	Notification Date	Reporters
						♥	• •	
	×	۲		None		<u>3732</u>	31 Mar 2011	Nurse, Mai
	×	۲	U	None		<u>3667</u>	1 Aug 2012	Nicolaidis,
	×	۲		None		<u>3612</u>	12 Mar 2011	Nurse, Mai
	×	۲		None		<u>3611</u>	5 Mar 2011	Nurse, Mai
	×	۲		None		<u>3609</u>	19 Feb 2011	Nurse, Mar

What is a Linked record?

A linked record is when one or more records that have been linked together for a specific reason e.g. multiple staff have been affected by one or the same incident or a complaint / compliment has been received by the same person; or one person has provided multiple complaints over a period of time.

Linked records can be created 3 ways

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

How can I tell if a record has been linked?

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

	۲	ou may make ar	y changes to the for	m that are appropr	iate. Then click 'S	Submit' at the bottom of the
Control Panel						
Maarian Control « <	n Manager (Fanager) on 14 Sep 2016	There have been no	adits.		> >>
Related Item ID 24 Master		·				
Actions						
✔ Bookmark	Archive	Alert Me!	Change History	Dist. List	Print	Display as: PDF 🗸

How do I create a new linked record from an existing record?

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

C RLDatix

RISKMAN REFERENCE GUIDE TO INCIDENT MANAGEMENT

- Within the Listing page (e.g. Feedback Inbox) click on the **Record Selector** • next to the record you wish to create a link with
- 2. Press the **Clone and Link 2** icon

2	0	My	Work	space	6	Manag	rement *	Admi	nistration * R	eports *	Help	Log Out			09	SER: S	pstern M	anoger ()	4.57
10	•	1	Ø	ø	Q		ſ		INBO			ck for Rev	iew			¢		×II	9
Drog		nin hei 1 Die		ne to g		y that co aroup		in Risk	Date Received *	Classed On	•	ivpc of I codback #	Sto *	Location T	Sammery		Report	tors Nam	
					•	•			- 7										
		No	w 🗵	7		0	10 Apr 2015		1 Apr 2015			Compleint.	Bowen		Advocate cor	spla	Syster	n Menag	**
		No	e 🗉	5			10 Apr 2015		9 Apr 2015			Complaint	Baxea		Clearly tries	4 HN	System	n Manag	×
		No	и 🗉	- 4			10 Apr 2015		1 Apr 2015			Completint	Wakelield		Patient comp	lan	Syster	n Menag	:1
	۰	No	e 🗉	3			10 Apr 2015		8 Apr 2015			Suggestion	Rayston		Client sugger	ted	Syster	n Manag	
	æ	No					29 Jan 2015		29 Jun 2015			Completint	Site		a			n Managa	

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

Note: The content of the fields copied when creating a linked record can be modified. Please contact RiskMan support – <u>https://hub.rldatix.com/SupportHUB/s/</u> if changes are required

How do I link 2 or more records together?

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

		0	345		6 7
ncident ID:		282	° Q 0		£ 🕩
Status	linking Reaso	ID	volved in the event also	(Who/What) Surname	
Master		284	Smith	Joe	
	3		Brown	Mary	

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

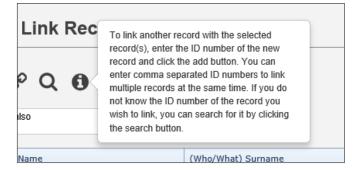
2. **New**: Enter the reason you are linking/de-linking this new record. The reason will be recorded in the Review History of the <u>master</u> record. Another Review History entry will be made in the master record while performing actions like linking, de-linking, changing the master record, and dissolving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

Date		User \$	Notes
27 Mar 201	7 13:17	System Manager (Manager)	Created the incident item.
27 Mar 201	7 13:17	System Manager (Manager)	Incident item posted.
27 Mar 201	7 13:17	System Manager (Manager)	Most recently viewed.
27 Mar 201	7 13:17	Megan Kirkby (kirkbym)	User Alerted and Email SENT. Alert ID: 2
27 Mar 201	7 13:17	Kim Edgar (edgark)	User Alerted and Email SENT. Alert ID: 18
27 Mar 201	7 13:17	Anne Wright (wrighta)	User Alerted and Email SENT. Alert ID: 20
27 Mar 201	7 13:17	Anthony Vidler (vidlera)	User Alerted and Email SENT. Alert ID: 21
27 Mar 201	7 13:17	Peter Simmonds (simmonp)	User Alerted and Email SENT. Alert ID: 22
27 Mar 201	7 13 17	Line manager. (Line manager)	User Alerted and Email NOT SENT. Alert ID: 45
27 Mar 201	7 13:26	System Manager (Manager)	Linked to ID 282
27 Mar 201	7 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		(Associated) Department/Service	
(Who/What) First Name (Conta	ins)		×
(Who/What) Surname (Contain	s)		
(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