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

0.1	1 %	ළ	Û	52	iaws Incidi	Entere ents entered by you been 'Di			or th	at have			¢		¢1	Ť
keg a column heade	here to ano	up by thet-	olumo													
	() Det			Incident Date		Incident Involved	- 9.	many		Fedity		Loostion		Outcome		
			9.9		• •					-						1
6 * Yas	None	376		12 Nov 2014		Clark		edta		Capel Hartington		AC3				
v •	None	274		12 Nov 2014		Clert	80	f		Acecie Privete		162				
Tes 1	None	374	3739	12 Nov 2014		Clart	80	r		Wattie Private		Centre Block 7th Flaor				
lin 👁 Yas	None	222	Master	12 Nov 2014		Clark	90	<i>r</i>		Wattio Privato		Centre Block 1st Fleor				
6 @ Yes	None	222		12 Nov 2014		Clert	ď			Acecie Privete		Administration				
B 👁 Yee	None	323	Naster	12 Nov 2014		Clert	ď	Sed .		Casel Hartington		AC2				
🗶 🔹 Yas	None	223	3737	31 Mar 2011		Clark	R	fail in shower		Acacle Fifvate		East Block 1st Repr				
🖌 🗢 Yes	None	222	3695	14 Nov 2012		Petient/Client	Pe	stert became aggre	55	Acecie Privete		East Block 4th Floor				
	1	370	1	11 Nov 2014		Clart	86	1		Acacia Private		102				
🖹 👁 Yaq	None	270		12 Mar 2013		Patiant/Client	R	esident fall in home		Capel Hartington		Centre Block Sth Flaor		ISR 1 SEVE	RE	
4 Records Found (Pr	iga 1 of 28)					Incident /						ns par poge: 10		«< < 1	•	>>
ontrol Panel			You may m	ake any chang	pes to the	e form that are	appropr	nate. Then click	c Su	bmit' at the bott	om o	the page.				
Version Control												-				
<				There	have been	n no edits.					> >>					
edited by:System	n Manager	(Manage	r) on 12 Sep	p 2016 12:29:26	5											
lelated Item ID		3										-				
79 80 1	laster		· · · ·													
Actions																
BOOKMAPK	Arch	ive	Alert	He! Chan	ge Histo	ry Dist. Li	ist	Print	0	isplay as: PDF	v	1				
Bookmark			Alert I	He! Chan	ge Histo	ry Dist. Li	ist [Print		isplay as: PDF	V]				
80 10 Reported th		nt?	Alert I System Ma		ge Histo	ry Dist. Li	ist][isplay asi PDF		1				
80 to Reported th porter's Name		nt?	System Me		ge Histo	ry Dist. L	ist [1				
to Reported th porter's Name ntact Phone		nt?			ge Histo	ny] Dist. U	ist [Rej	ports	er's Position		1				
80 to Reported th porter's Name stact Phone to are you?	e Incide	nt?	System Me		ge Histo	ry Dist. Li	ist) [Rej What i	ports			1				
80 to Reported th porter's Name stact Phone to are you?	e Incide	nt?	System Me		ge Histo	ry Dist. Li	ist][Rej	ports	er's Position		1				
ao o Reported th corter's Name itact Phone o are you? at is your email you Reporting	e Incide address	nt?	System Ma test test	mager	ge Histo	ry Dist. Li	ist][Rej What i	ports	er's Position		1				
80 to Reported the porter's Name stact Phone to are you? at is your email to you Reporting half of Another I	e Incide address	nt?	System Ma test test	snager				Rej What i	porte	er's Position Ac	dminis	1		,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,		
no Reported th porter's Name intact Phone to are you? nat is your email a you Reporting half of Another i cuments	e Incide address the Incid Person?	nt?	System Ma test test	snager				Rej What i	porte	er's Position Ac	dminis	tration	~ ~ ~			
no Reported th porter's Name intact Phone to are you? nat is your email a you Reporting half of Another i cuments	e Incide address	nt?	System Ma test test	snager				Rej What i	porte	er's Position Ac	dminis	tration			~~~~	,100
no Reported th porter's Name intact Phone to are you? nat is your email a you Reporting half of Another i cuments	e Incide address the Incid Person?	nt?	System Ma test test	snager		۰ بر بهره و را معرف	~~~~	Rep What is	porte	er's Position Ac	dminis	tration	~ ~ ~	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	~~~~~~	
no Reported th porter's Name intact Phone to are you? nat is your email a you Reporting half of Another i cuments	e Incide address the Incid Person?	nt?	System Ma test test	snager		۰ بر بهره و را معرف		Rep What is	porte	tr's Position Ac	dminis	tration	~ ~ ~	,,,	~~~~	
80 to Reported th porter's Name ntact Phone to are you? Tak is your email y you Reporting all of Another cuments Add	e Incide I address ¹ the Incid Person? Docum	nt?	System Ma test test	snager		۰ بر بهره و را معرف	~~~~	Rep What is	porte	er's Position Ac	dminis	tration	~ * *	,,,	~~~~	
BO to Reported th porter's Name ntact Phone ntact Phon	e Incide I address? I address? Docum Docum	ent	System Ha test test test		iotes	5 (1) (1) (1) (1) (1) (1) (1) (1) (1) (1)	ubmi	Rep What is	porte	tr's Position Ac	dminis	tration	~ ~ ~	,,,		,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,
so o Reported th sorter's Name stact Phone o are you? at is you sour email of Another cuments Add	e Incide address the Incid Person? 	ent Ty	System Ha test ies No r (default	nager	Notes	SI the incident.	ubmit	Rep What is	porte	tr's Position Ac	dminis	tration			~~~~	
so no Reported th porter's Name ntact Phone to are you? lat is your enable half of Another work and the source cuments Add	e Incide I address ¹ the Incide Person ² Docum	ent on , eent on , eent	System He test test (default	nager	iotes Prested Most res	Si I the incident:	ubmil	Reg What i t	porte is yo	tr's Position Ac	dminis	tration			~	
ao a Reported th porter's Name stact Phone o are you? at is your easily at is your	e Incide I address the Incid Person? Docum Iistol User 23 Defe 23 Bret 23 Bret 23 Bret 23 Bret	ent ent y ent y ult Use Fernanac	System Heat test test (default (default) (default) dez (ter (bret)	nager	totes Created Vost rei Jaer Ala	the incident. Sited and Em	ubmit ail sem	Reg What is = ~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	porte is you	tr's Position Ac	dminis	tration	~~ ^~ ^		~~~~	
BO IN Reported th porter's Name ntact Phone is are you? Tait is your email of another comments Add Sep 2010 15 Sep	e Incide address: he Incide lessen? Docum User 23 Defa 23 D	ent?	System He test test (default (default dec (bre sec (hat	t) (LM brett) (LM bret	iotes Creater Sizer Ala Jizer Ma	the incident. cently viewed, etted and Em atted and Em	ubmit usis servi	Reg What is = ~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	porte is you	tr's Position Ac	dminis	tration	~~ ^~ ~	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	~~~~	
so no Reported th porter's Name ntact Phone to are you? lat is your enable half of Another work and the source cuments Add	e Incide I address Person? Docum Iistoi 23 Defa 23 Def	ent?	System Ma test test r (default r (default ager (Ma ager (Ma	<pre>vnager vnager v) vnager v) vnager v) vnager v) vnager vnager</pre>	Notes Created Most rev Jacer Ala Jacer Ala Jacer Ala Most rev Most rev	the incident. Sited and Em	ubmil ail SEM ail SEM	Reg What is = ~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	porte is you	tr's Position Ac	dminis	tration				

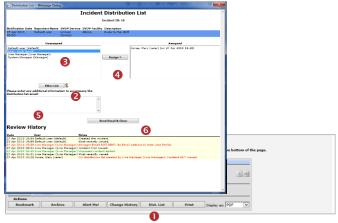
- 1. Review the Incident and investigate as required
 - Fields displayed in **yellow 2** are **mandatory** and must be completed before saving the incident
 - If the incident involves more than one person and a linked incident has been created, click on the respective ID S to view the other incidents 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 Histo	ry		Show Log Email	Web Page Dialog	
Date User 6 Feb 2010 09:32 Sys 6 Feb 2010 09:32 Sys 6 Feb 2010 09:32 Esle 6 Feb 2010 09:33 Dar 6 Feb 2010 09:33 Dar 6 Feb 2010 09:33 Dar 6 Feb 2010 09:32 Esle 6 Feb 2010 09:32 Esle 6 Feb 2010 09:32 Esle 6 Feb 2010 09:32 Esle 6 Feb 2010 09:32 Esle 6 Feb 2010 09:33 Dar 6 Feb 2010 09:34 Esle 6 Feb 2010 09:34 Sys 6 Feb 2010 09:42 Rai 6 Feb 2010 09:42 Rai	tem Manager (Manager) idan, Anne (anne) ir, Scott (acott) iel, Sharee (sharee) iel, Sharee (sharee) iel, Sharee (sharee) iel, Sharee (sharee) iel, Sharee (sharee) iel, Cantone (Ckelly) tem Manager (Manager) tem Manager (Manager) tem Manager (Manager) tem Manager (Manager) tem Manager (Manager) tem Manager (Manager)	Notes Created the incident. Manager Email SDT. Manager Final SDT. SDT. Not Email address for addression factored for System Ma- ternal SDT. Darkholton, Mark 20, Email User Alerda of Email Suft Aren 10: 5 User Alerda of Email Soft Text Aren 10: User Alerda of Email Not SET. Aler 10: 4 Mark and Set 10: 5 Control Set 10: 5 Control Set 10: 5 Control Set 10: 5 Control Set 10: 5 Control Set 10: 5 Control Set 10: 5 Control Set 10: 5 Control Set 10: 5 Control Set 10: 5 Control Set 10: 5 Control Set 10: 5 Control Set 10: 5 Control Set 10: 5 Control Set 10: 5 Control Set 10: 5 Control Set 10: 5 Control Set 10: 5 Control Set 10: 5 Control Set 10: 5 Contr	ext Of Email: Brett can you out some more then please e	Distribution E-Mail Text. Bet Farmades (Hensyer) 342 please follow-up with Mary and find details about this society. Could you there the information into a dournal. I led once you have added the journal.	s
		and the second se			

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!
{	// // //
{	and the second 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

		Inc You may make any changes to the for	ident / Hazar n that are appropriat		at the bottom of the p
Control Panel					
Version Control					
< < <		There have been no e	dits.		> >>1
ast edited by:System	Manager (Manage	er) on 12 Sep 2016 12:29:26			
Related Item IDs					
79 80 M a	ister				
Actions					
✓ Bookmark	Archive	Alert Me! Change History	Dist. List	Print Display a	IS: PDF 🗸

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

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

۵	му и	/orkspace	Adm	inistration	Reports Help	Log Out		USER: Brett Fernandez (Bre
teminde	rs							
Dist	ributic	in Lists: 1	1 C	Bookmarke	ed Items: 9 🕕	Alloca	ted Actions: 3	Allocated Journal Actions: 22
		arked the foll-		Notification				
Туре	_	Assigned	<u>ID</u>	Date	Reporter's Name	Surname	Location	Summary
Incident		22 Mar 2006		6 Mar 2006	Brett Fernandez	Smith	AC1	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 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
- 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 **(**
- 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 Preview 2



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

<u>To add a Journal</u>

- 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 **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 S



		Webp								
					Journal	Entry				
lou	urnal Type	_		Description						
Fu	orther Action	2	•	Please look into why th	is incident occu	irred and what a	dditional training	requirements a	re 🔺	
Dat	teStamp:	Ŭ.,		needed. If required ad	d another journ	al with your con	nments 3		ABC .	
12	Jan 2012	-	07:39		-				-	
ou	urnal Follow U	Jp:		24 Jan 2012 🔹	רנ			Item Acti	oned: 📃	
ol	low Up Alloca	ated To:		brett (brett) 👻 Selec	:t User 🎖 🗿	Select Me				
۱m	nount:				J -					
				G	dd Entry	Cancel				
				-						
		_	_							
00	rnals and Acti Add New J		ntry							
_		ournal E		Description				Follow Up Allocated To	Journal Follow Up	Item Actioned
	Add New J DateCreated	ournal E	ne Journal Type	Description Please look into why this requirements are needed comments						Item Actioned on
101	Add New J DateCreated Today urnal Type:	ournal E Usernar Manage	ne Journal Type Further Action	Please look into why this requirements are needed comments DateSi	l. If required add	d another journal	with your 39	Allocated To brett	Follow Up 24 Jan 2012	on
8	Add New J DateCreated Today	ournal E Usernar Manage	ne Journal Type Further Action	Please look into why this requirements are needed comments DateSi to why this incident occur	l. If required add	d another journal	with your 39	Allocated To brett	Follow Up 24 Jan 2012	on
a) Doi De	Add New J DateCreated Today urnal Type:	ournal E Usernar Manage	Type Further Action Further Action Further Action	Please look into why this requirements are needed comments DateSi to why this incident occur ts	l. If required add	d another journal	with your 39 equirements are ne	Allocated To brett	Follow Up 24 Jan 2012 d add anothe	on
loi	Add New J DateCreated Today urnal Type: escription:	ournal E Usernar Manage	Further Action	Please look into why this requirements are needed comments DateSi to why this incident occur ts	 If required addition to the second sec	d another journal 12 Jan 2012 07: ditional training r	with your 39 equirements are ne	Allocated To brett	Follow Up 24 Jan 2012 d add anothe	Actioned on er journal v

- 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 ⁽¹⁾ 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

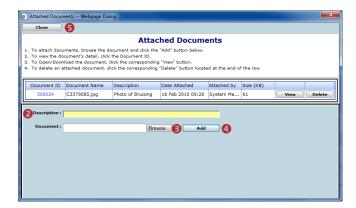
30	urnals and Act	ions					
	Add New 1	lournal E	ntry				
	DateCreated	Useman	ne Journal Type	Description	Follow Up Allocated To	Journal Follow Up	Actioned
¥	12 Jan 2012	Manage	Further Action	Please look into why this incident occurred and what additional training requirements are needed. If required add another journal with your comments	brett	24/01/2012	False
	urnals and Act				ID:4 is Journa Action Yes No	3 al Item b ed?	
_		ions			×		
	Add New .	Journal E	ntry	/			
Γ	DateCreated	Usernar	ne Journal Type	Description	Follow Up Allocated To	Journal Follow Up	Actione
*	12 Jan 2012	Manage	r Further Action	Please look into why this incident occurred and what additional training requirements are needed. If required add another journal with your comments	brett	24/01/2012	False
P	ournal Type: escription:		Further Actic Please look your comme 24 Jan 2012	into why this incident occurred and what additional training equirements are nee	eded. If required		
	mount: Edit Delet		0			ournal Entry (IC	9:43)

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

CRLDatix RISKMAN REFERENCE GUIDE FOR LINE MANAGERS - REVIEWING INCIDENTS



								1	Close	
								Review History		
								Date User	Notes	Delegated By
								14 Aug 2006 10:10 winter, barb (barb)	Created the incident.	
								14 Aug 2006 10:10	Risk Manager Email SENT.	
	O MyV	brispe			icement '		nistration 1	14 Aug 2006 10:10 hayden, anne (anne)	Manager Email SENT.	
	Intervention	Unaper	ue	120100	ADDIN KEITE	Admi	inscraption	14 Aug 2006 10:10	Email sending process after initial incident entry was successful.	
								14 Aug 2006 10:13 havden, anne (anne)	Incident entry was successful. Incident first viewed.	
		-						14 Aug 2006 10:13 hayden, anne (anne) 14 Aug 2006 10:18 System Manager (Manager)	Incident first viewed.	
ୀର	1		æ	- 6	ካ 🖬	一前		15 Aug 2006 12:42 System Manager (Manager)	Unposted incident edited.	
~	~		~		_			15 Aug 2006 13:43 System Manager (Manager)	Incident posted.	
								15 Aug 2006 13:43 Scott D. Ealer (Scott Ealer)	User Alerted.	
								15 Aug 2006 15:18 Scott D. Esler (Scott Esler)	User Alerted.	
								17 Aug 2006 16:26 Line manager (brett) (LM brett)	Email SENT: Distribution List	
	s column he	alex have		and the second second	Beef and			17 Aug 2006 16:26 hayden, anne (anne)	Email SENT: Distribution List	
unag	a cotarini ne	oe ie	enge	op by	and car			22 Aug 2006 14:50 Line manager (brett) (LM brett)	Incident first viewed after being	
	Ambine		Dist		ID.	Group	Inches		assigned on winter, barb (barb)'s	- 1
	0.0110		0101			Giocp		the second se	distribution list.	
								22 Aug 2006 14:50 Line manager (anne) (LM anne 22 Aug 2006 14:51	Risk Manager Email SENT.	Line manager (brett) (LM brett)
_	_	_	_	_	- 1		_	8 Aug 2008 11:37 Brett Fernandez (Brett)	User Menager Email SENT, Alert	
8	Yes		None		200	3696	12 Nov 2	o Hog 2000 11107 Diete Fernandez (Diete)	ID: 20	
				/				23 Sep 2008 11:08 Brett Fernandez (Brett)	Email SENT: Distribution List 5	
e⁄			None	ш.	3742	3739	12 Nov 2	and the second second second second second second	A Emails	
-	-	1			3741			16 Oct 2008 13:42 Duncan, Helen (hduncan)	On distribution list created by	
-	- 2		None	ш	2/41	3759	12 Nov 2	the out ender three boundary mellen (nonucan)	System Manager (Manager): Incident	
100	. 4		None		3739	Mashar	12 Nov 2		NOT viewed.	
-23	- 165				2.22	1-1000		6 Nov 2008 10:35 System Manager (Manager)	Unposted incident edited.	
8	(P) Yes		None		3738		12 Nov 2	6 Nov 2008 10:38 System Manager (Manager)	Most recently viewed.	
					_			6 Nov 2008 10:38 System Manager (Manager)	Unposted incident edited.	
8	e Yes		None		3737	Master	12 Nov 2	6 Nov 2008 10:38 System Manager (Manager)	Posted incident edited.	
-										
×	Tes		None	ш	3732	3737	31 Mar 2	and the second se		
	· Yes		None		3730	2025	14 Nov 2	Journal History		
	Tes		note		3/32	3895	14 (SOV 2			
ø					3738		11 Nov 2	Date User Notes		
~			•	ω.	37.92			14 Aug 2006 10:17 havden, anne (anne) Action Ti	aken	this is action taken
2					3794					

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 eigenvalue on the respective document) will display in the Document Details pop-up window

5000 Intro to J Document Details 1 Save	RM for Staff.pdf Webpage Dialog	Intro2RM	6/02/2012 2:48:00 PM System Mar	nagar (Managar) 1290 View (Delet
					×
Save	Man				
		Close			
		De	ocument Details		
To save the docume					
To Open/Download	the document, clic	k the "View" butt	on.		
Document ID : 50	00001	· /	Attached By : System Manager (Manager	Date Attached : 6 Mar	201
ocument Name : Int	tro to BM for Staff	ndf	Size (KB) : 1290	Attached To : Incide	ents
		(pur	512 (10) - 1255		
Description : Int	tro2RM			Incidents ID : 46	
ansmit To VMIA : 🕅					
Insmit TO VPITA :					
	r.v.				
eview Histo					
	User	Action			
te l	User		-		
lar 2012 14:48 S		Manager) Docum	ent attached		

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

	e incident cha	ange History Webpage Dialog			
		In	cident Edit Histo	ry	
				Clo	50
	Changes by	version Changes by field	• 🙆		
	Version 1	Created by System Manager	(Manuger)	Date: 6 Nov 2008 10:56	
	Version 2	Created by Brett Fernandez	Brett)	Date: 7 Nov 2008 13:15	
	Version 3	Created by System Manager	(Manager)	Date: 20 Aug 2009 16:51	
	Version 4	Created by winter, barb (barl)	Date: 24 Aug 2009 12:34	
	Version 5	Created by Brett Fernandez (Brett)	Date: 24 Aug 2009 12:36	
	Version 6	Created by System Manager	(Manager)	Date: 1 Sep 2009 15:32	
	Version 7	Created by System Manager	(Manager)	Date: 1 Sep 2009 15:36	
	Version 8	Created by System Manager	(Manager)	Date: 4 Dec 2009 11:07	
	Version 9	Created by System Manager	(Manager)	Date: 4 Dec 2009 11:10	
	Value has ch	anged for Date of Birth			
	Original V	/ersion:			
	Version 4		1 Jan 1960		
		anged for Age			
	Original V				
	Version 4	anged for Employee Location	48		
	Original				
	Version 2		AC1		
	Value has ch	anged for Job Title			
	Original V	/ersion:			
	Version 5		Nurse		
		anged for Type Of Employment			
You ma	Original V Version 2		Full-Time Permanent (1)		
		anged for Type Of Employee	Full-Time Permanent (1)		
Control Panel	Original V				
Version Control	Version 2		Apprentice (12)		
	Value has ch	anged for Reporter's Position			
< <	Original V				
st edited by:System Manager (Manager) on 12	Version 2		Acting Charge Nurse		
		anged for Treatment Given			
Related Item IDs	Original V	/ersion:			
79 80 Master		•			
Actions		U			
✓ Bookmark Archive Ale	rt Mel	Change History Dist	List Print	Display as: PDF 🗸	

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 Rev	riew
	You may make any changes to the form that are appropriate.	. Then click 'Submit' at the bottom of the page
Control Panel		
Version Control		
1<< <	There have been no edits.	> >>1
Last edited by:System Manager	(Manager) on 12 Nov 2014 14:56:39	
Related Item IDs 3696 Master 36	97 3763	
Actions	U	
Bookmark 🖌 Arc	ive Alert Mel Change History Dist. List Print Preview Dist	play as: PDF 💌
and a surface and a surface of the s	and a start and a start and a start of the start and a start of the st	**************************************

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	2	1	М	ø	ć	2	Î	Sh	ows incider	Entered Its entered by you or an		reporting to you, or that has	re been 1		٥	•	٩
Drag	аc	olumn hee	sdar ha	re to gr	cep b	y thet colu	mn										
		Archived	9 8	Dist		ID.	Group	Incident Date		Incident Involved		Summary 💌	Fedility 1	Location		Outcome	
						\$			- 9		7	2		♥			
ø	۰	Yes		None		3671	Hester	1 Aug 2012		Pullent/Client		Pt was violent towards	Acacia Private	AC3		ISR 2 HIGH	
2	æ	Yes	8	None		3169		1 Aug 2012		Polient/Client		Patient hit the staff me	Acacia Private	East Block 2nd Floor		ISR 4 MINOR	
×			8	None		31.	Haster	1 /02 2012	0	Pelient/Cient		Pt fell from bed and fra-	Acacia Private	Centre Block 2nd Ros	e -	ISR 2 HIGH	
8	- 10			None		2665		31 Jul 2011	-	Pelient/Client		Patient fell resulting in	Eucelyptus Lodge	Consulting suites		ISR 4 MINOR	
-	æ			z		3663		21 Feb 2012		Patient/Client		Client aggressive towar	Acacia Private	Centre Block 7th Floo		ISR 5 NEAR MISS	
ø	۰	Tes		None		3649		9 reb 2012		Patient/Client		patient had a fel	Eucelyptus Lodge	Centre Block 3rd Floo	r -	ISR 2 HIGH	
1	۲			None		3635		6 Feb 2012		Pelient/Client		Incorrect case of medic	Acacia Private	Centre Block Bh Floo		ISR + MINOR	
-	۲			None		3631	Haster	3 Feb 2012		Staff Nember		Became aggressive tow	Acecie Privete	Centre Block 3rd Floo	r	ISR 3 MEDIUM	
-	æ			None		2622		17 Aug 2011		Pelient/Client		Petient fell in shower	Acecie Privete	Centre Block 1st Floo		ISR + MDVCR	
1				Neres		3619		11 Jun 2011		Cient		Peters incurred excession	Acecia Private	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 ⁽²⁾ column will display, indicating which incidents have been archived. Archived incidents can still be opened and modified if required

0		1	П	S	ආ	Entered Incidents Shows incidents entered by you or anyone reporting to you, or that have	🕛 o 🗉 🕸 🦷
						Shows incidents entered by you or anyone reporting to you, or that have been "Distributed" to you.	
0.46	a co	iumn hea	cer her	a to gro	up by the	Selection Settings	×
		Archived	0	Dist		Selection Settings	Dutcome r
	æ	Yes		None	32	Display: Entered Incidents All Incidents	
~	æ			None	32	Date Entered: From To .	
	æ	Yes		None	32	Incident Date: From To	sk 7th Roor
		Yes		None	22	Date Entered in RiskMan: From To	x 1st Floor
8		Yes		None	22	Incident IDs: 2	on
	æ	Yas		Nona	37	Show Archived:	
*	æ	Yas		Nona	37	Allow rows to expand vertically.	Lst Floor
2	æ	Yes		None	37	Apply Settings 3	Ath Floar
	æ			1	37		
	æ	Yes			37		k 5th Poor ISR 1 SEVERE
						Clear Layout	
		ds Found	(Page 1	of 201			a 10 💌 🔍 < 1 💌 > >>

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

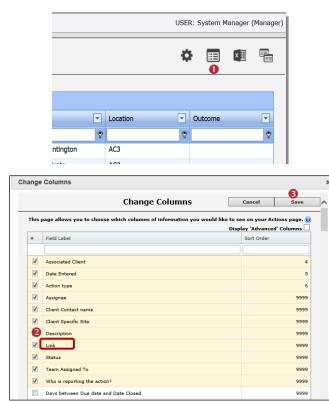
3. If the incidents were entered separately they can be

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 **1** 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 2 icon

1	O P	y Wor	kspac	e "	M	anaq	ement	•	Adminis	tratio	on * Reports	s '	"Help "		.og Out						USER: 1	Syste	en Manager (Man
0	1	М	đ	>	2		iú	ï		Shov	s Incidents entere	ed b	ered Inc by you or anyon en "Distributed"	e re	porting to you, or		at have				٥	0		Ē
	a column b																							
Diag																								
	Ardaly	od 🎚	Dist	1	1 1	2	Group	Int	Ident Deta	. *	Incident Involves	d *	Sitte	٠	Location 1		First Name	٠	Sumamo	٠	Summary	٠	Reporters Na	me 1
						٠		٠				۲		٠		٠		۴		٠		٣		
	۰		Non	e 🔳	1	2	-	21	før 2015		Hazard		Roystan		Operating Theo						water on verall.		System Man	oar
-			Non	- 12	1	0	U	21	5e 2015		Hapard		Royston		Maintenance						996962222		System Man	œ
	*		Non	-			-	21	bii 2015		Patient		Royston		Stores		pat		nci		kuglagtihijoi		System Han	90ar
0	*		Non		,			26	Feb 2015		Relative/Visitor		Wakefield		HR		Martha		NoKenzie		Fail Into lit		System Han	
-			Non	e 🗉	4			3 24	Feb 2015		Umployee		Site		Location		30		bloggs		fell down lift sh	n.	System Han	Qef
×			Non	c 📃	1		Hast	r 24	Feb 2015		Linployee		Site		Location		30		bloogs		fell down lift sha	s/t	System Han	ger
			Non	c 🔳				23	Feb 2015		Employee		Sile		Location		laho		Due		Needleadick dar		System Hara	ю
M			Non					21	ieb 2015		Faultaner(/Fault		50e		Location						(ex)		System Nam	

- 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 S button next to the incident that will be the master incident
- 6. Press Close 6

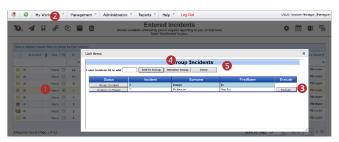
0	1	A -	ø	Q		Entered Incidents Shows incidents entered by you or anyone reporting to you, or that have here "Distributed" to you.	¢ 🖩 🕮 🖗
	a column hea		a ta p			n	
	Antraid					Link items	X an Nation 7
						Group Incidents	
	*				12	Inter Insident ID to add And to Group Disardue Group Close 6	Manager
							Manaour
							Name Exclude Manager
8						Hoster Incident 3 bioops 30 Proceeds to Name 5 No. Service Marine	techola: Mersenet
							Manager
×	e.	1	ione		3		Manager
3	۰	r	icne		2		Manager
	2				1		Manager

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*