## Introduction

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

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

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

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

### Review the detail of the Incident

- Check the **Review History** to see who else is aware of the incident
- Create a Distribution List if others need to be informed of the incident
- **Optional: Bookmark** the incident if you wish to enable a quick return to the incident
- Check consistencies of classifications
- Remove any inappropriate statements or unfounded allegations as organisational policy may dictate
- Submit any details that need immediate change

### Investigate the Incident

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

### **Complete the Incident**

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

### **Reviewing Incidents**

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

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



### To view an incident from the Entered Incidents page

• Click on the Incident ID ①

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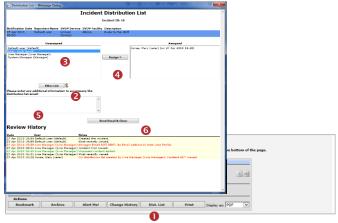
- 1. Review the Incident and investigate as required
  - Fields displayed in **yellow 2** are **mandatory** and must be completed before saving the incident
  - If the incident involves more than one person and a linked incident has been created, click on the respective ID S to view the other incidents linked with this incident. <u>Each linked incident needs to</u> <u>be reviewed and submitted separately</u>
  - The Review History ④ at the bottom of the incident will indicate to you who has been notified of, edited or viewed the incident. If required create a distribution list to notify other users of the incident
- If changes are made to the incident press the Submit
   button at the bottom of the incident
- 3. The changes will be visible to all authorised users and the original version of the incident will remain intact

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

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

- 1. Click on the **Dist List 0** button
- Search for the users using the Filter List ② option e.g. filter by the user's first or last name
- 4. Repeat steps 2-3 if more users are to be notified
- Recommended: Enter a comment S explaining why the selected users are being distributed the incident. These comments will appear on the email that is sent to the nominated users and can also be accessed from the Review History of the Incident
- 6. Press Send Email & Close @

**Note:** If there are already users in the Assigned list when you are creating a Distribution list, it means that the users have not yet read the incident – **do not delete** them from the list, as this could negate their permissions to the incident. Only the newly added users will receive the email



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

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

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

<b>Review Histo</b>	ry		Show Log Email	Web Page Dialog	
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# 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!
{	// // //
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{	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

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### 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**

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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



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

# How can I view a list of outstanding tasks assigned to me?

If you have been assigned a task via the Journals, all your un-actioned Journals will be listed in your **Allocated Journal Actions 1** list under your *My Workspace -> Reminders & Alerts* page

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



### How do I action a Journal?

If a Journal is assigned to you, to ensure the creator of the journal knows that you have completed the task, the Journal should be <u>actioned</u>

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

Expand icon 🕙 0

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

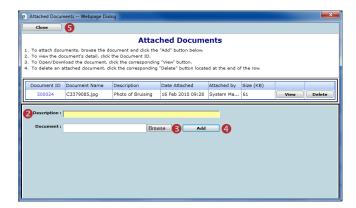
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## Can I attach a file to an Incident?

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

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

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



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### 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

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

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

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

### To view the Review History of an incident

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

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

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

- Click on the Change History 

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

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

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	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	
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# 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

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### 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

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

Enter Selection Settings by clicking on the



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

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# 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

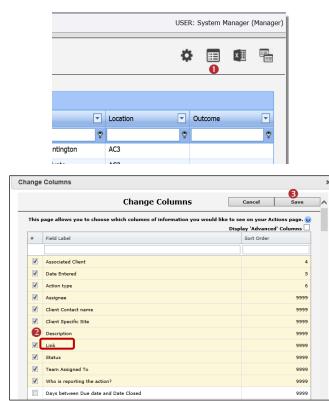
3. If the incidents were entered separately they can be

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

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

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

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

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



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

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

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

- Click on the Record Selector 

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



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

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

### What happens if I go on leave?

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