Introduction

This reference guide is aimed at Consumer Advocates or Risk/Quality Managers who are responsible for ensuring Feedback notifications have been followed up by the respective Line Managers, complaints and/or enquiries are resolved and closed and to post feedback ready for reporting

What is "posting"?

Posting means a "master" version of the feedback notification is created. There is only **ONE** master version for each feedback notification created in RiskMan. This "master" version is used on all Feedback Reports

Role of the "Poster"

When Feedback is entered by a staff member, optionally it is the responsibility of their Line Manager to review the Feedback and report their findings. It is then the responsibility of the Consumer Advocate or Risk/Quality Manager to ensure they review the details of the feedback and to:

- Check the **Review History** to see who else is aware of the feedback notification
- Create a **Distribution List** if others need to be informed of the feedback
- **Optional: Bookmark** the feedback notification to enable a quick return to the notification if required
- Check consistencies of Issue Classifications if applicable
- **Save** any details that need immediate change

Follow-up on any Complaints/Suggestions/Enquiries

- Return to the Feedback (via Inbox or Bookmark)
- Ensure any complaints/enquiries/suggestion have been acknowledged and the **Date Acknowledged** field is updated
- If a complaint is a result of an Incident, link the incident to the complaint
- **Add/Assign Journal Actions**
- **Edit Issues/Suggestions/Enquiries** – Ensure these are followed up or update as required
- **Provide a response to the family** – This may include ensuring that all relevant documentation is linked to the Feedback notification via the **Documents** section and recording any response that may have been provided to the family e.g. phone calls, correspondence via the **Journals**

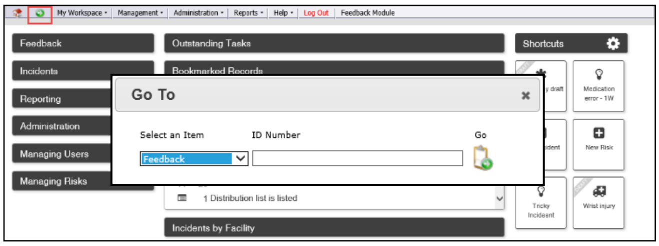
Close the Feedback Notification

- Complaints may need to be resolved within a specific period of time e.g. within 30 days of being received. Ensure that the
  - Issues, once completed, are resolved & closed
  - Journal Actions, once completed, are marked as actioned
  - The Feedback Notification, once completed, is closed.
- Remove the **Bookmark** if required
- Post the Feedback Notification ready for reporting
- Modifications may be made after posting and these can be updated into the master record once received

Reviewing & Posting Unposted Feedback

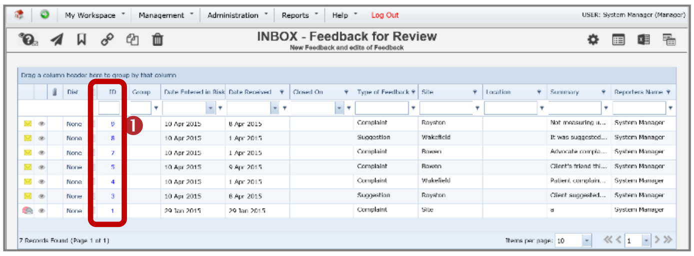
If I know the ID of the Feedback Notification you can use the "Go To" function to locate the notification

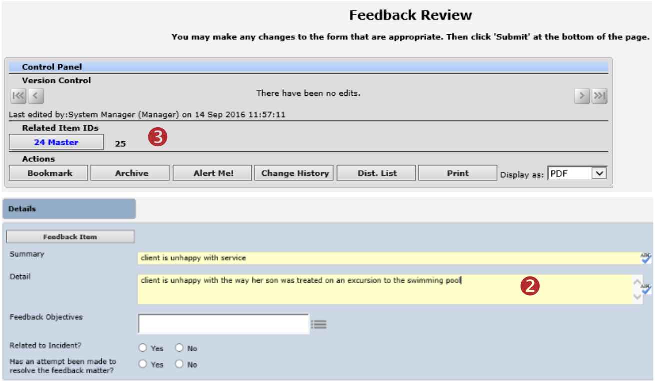
1. Press the **Go To** icon on the menu or press **ALT-G**
2. Select **Item = Feedback** and enter the **ID**
1. Press **Enter** or the **Go** button
2. If you have permission to the notification it will be displayed



To view Feedback Notification from the Feedback Inbox page

To review a Feedback Notification, from the menu select *Management -> Inbox -> Feedback* and click on the Feedback **ID** ❶





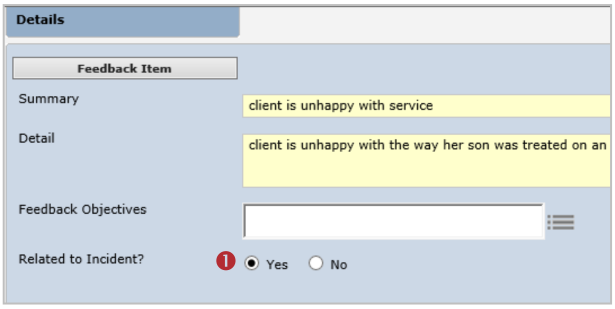
1. Review the feedback and follow-up as required
    - Fields displayed in yellow ❷ are **mandatory** and must be completed before saving the notification
    - If you receive a complaint and compliment from the same person a linked feedback may have been created. If so, the ID's of the linked feedback will appear in the Control Panel of the reviewed Feedback. Click on the respective **ID** ❸ to view the other feedback notifications linked with the displayed notification. **Each feedback in the link needs to be reviewed, updated and saved separately**
    - The **Review History** ❹ at the bottom of the feedback will indicate to you who has been notified of, edited or viewed the notification, create a distribution list to let others know about the Feedback notification

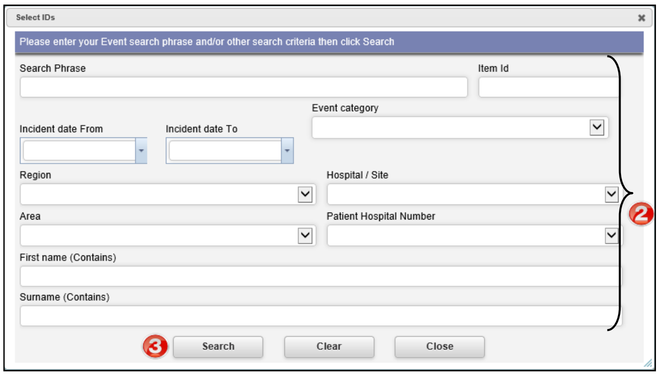
2. If changes are made to the feedback, either
    - Press **Save without posting** ❺, if you want to save your changes but not "post" the notification. In this case the notification will remain in the "Inbox" for posting at a later stage
    - Press **Post** ❻ if you want to save your changes and "post" the notification ready for reporting. In this case the notification will be removed from your "Inbox" view and will be available to view and edit in the "Posted Feedback" listing

Can I link a Complaint to an Incident?

If a complaint is a result of an incident, the Incident/s that are associated with the Complaint can be linked

1. Open the Feedback from the Feedback Inbox page
2. On the Unposted Feedback Entry Review page, select 'yes' for **Related to Incident?** ❶
    - A Search window will display
3. Enter your search criteria ❷
4. Press **Search** ❸
5. **Check mark** ❹ the incident/s that you wish to associate the Feedback to
6. Repeat steps 3-5 if you wish to associate more incidents from another search
7. Press **Submit** ❺



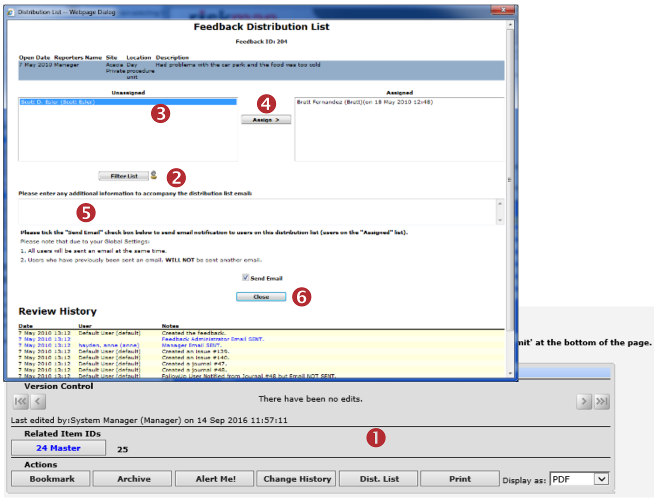


How do I let others know of the feedback?

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

1. Click on the **Dist List** ❶ button
2. Search for the users using the **Filter List** ❷ option e.g. filter by the user's first or last name
3. Highlight the user in the **Unassigned List** ❸ and press **Assign** ❹
4. Repeat steps 2-3 if more users are to be notified
5. **Recommended:** Enter a **comment** ❺ explaining why the selected users are being distributed the Feedback. This comment will be included in the distribution email
6. Press **Close** ❻
7. An email notification will be sent to the users on the **Assigned** List who have an email address in their user profile

Note: *If there are already users in the Assigned list when you are creating a Distribution list, it means that the users have not yet read the Feedback –* ***do not delete*** *them from the list as it may negate the user's permission to the Feedback notification. Only the newly added users will receive the email*



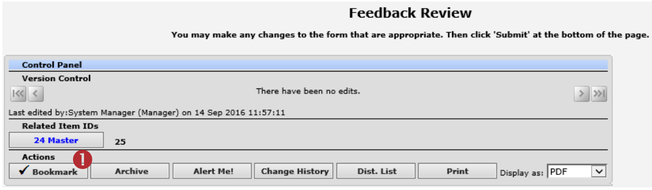
Can I view comments sent in a Distribution List?

At this stage, it is not possible to view these comments. They will only be available in the email that is sent to the respective users.

What is the "Bookmark" function?

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

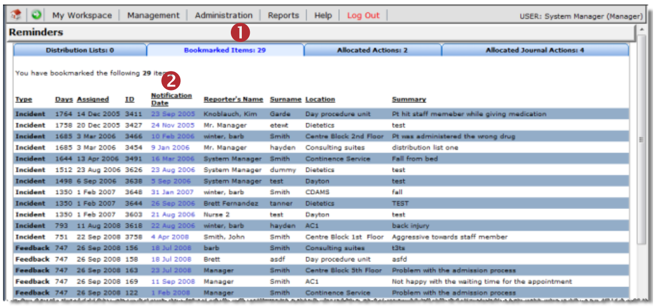
To bookmark a Feedback Notification, click on the **Bookmark** ❶ button



How do I view my bookmarked feedback?

All your bookmarked feedback (and incidents) will be listed in your **Bookmarked Items** ❶ list under your *My Workspace -> Reminders & Alerts* page

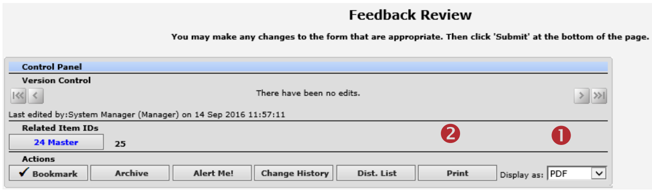
1. To open the Feedback, click on the **Notification Date** ❷ link
2. To remove the bookmark, click the **Bookmark** button on the **Control Panel**



Can I print a copy of the feedback?

A copy of the current version of the feedback notification can be printed from an opened notification in different formats e.g. Word™, PDF or Excel™

1. In the Control Panel, select an **output format** ❶
2. Press **Print** ❷



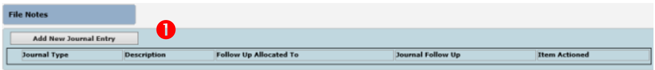
How do I add a Progress/File Notes or assign a task?

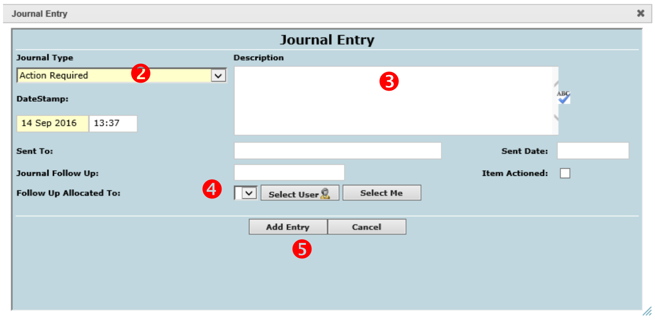
Journals are used add progress/file notes and can also be used to assign a task or action or another RiskMan User. When you assign an action or task, the assigned user will be sent an email notification with details of the task and a link to the Incident

To add a Journal

1. Press **Add Journal** ❶
2. Select a Journal **Type** ❷
3. Enter a **description** ❸ of the Journal

4. If you are assigning a task
   - Enter a **due date** or select the date using the date picker in the **Followed up Date** field ❹
   - **Assign** a user in the **Follow-up User** field ❹ - press the Filter button and search for the user. You will need to select the user from the Follow-up User field once you have used the filter option
5. Press **Add Entry** ❺
6. If the journal is <u>not</u> allocated to a user, it will automatically be actioned once the feedback is saved
7. If the Journal <u>is</u> allocated to a user, once the Feedback is saved an email notification will be sent to the allocated user with details of the Journal and a link to the Feedback Notification
8. If the Journal is not actioned by the due date then an email reminder will be sent to the allocated user as well as the creator of the Journal

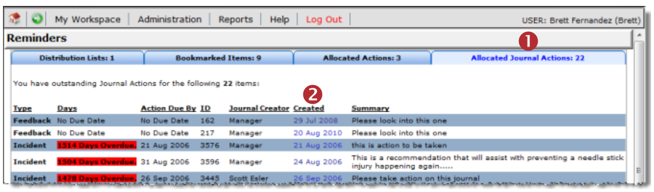




<u>How can I view a list of outstanding tasks assigned to me?</u>

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

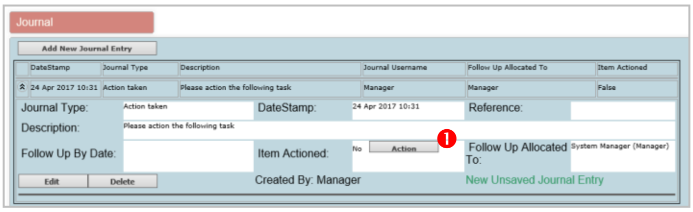
1. Click on the **<u>Created</u>** ❷ date link to open the Feedback
2. Once you have actioned the Journal it will be removed from this list



<u>How do I action a Journal?</u>

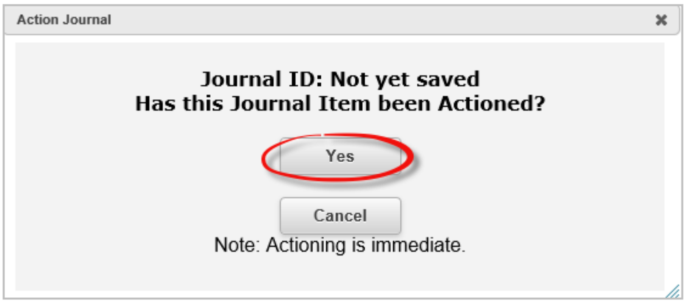
If a Journal is assigned to you, to ensure the creator of the journal knows that you have completed the task, the Journal should be **<u>actioned.</u>** To action a journal task follow the below steps:

1. Press the **Action** ❶ button next to the respective Journal



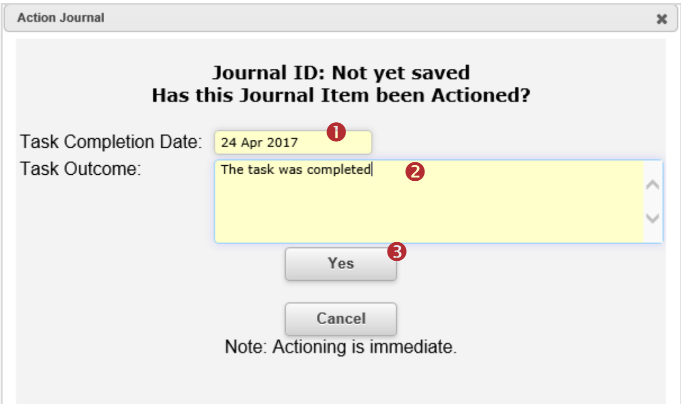
2. A pop-up will appear asking if the journal item has been actioned. Depending on your system configuration, you will see either of the below messages:

Option A

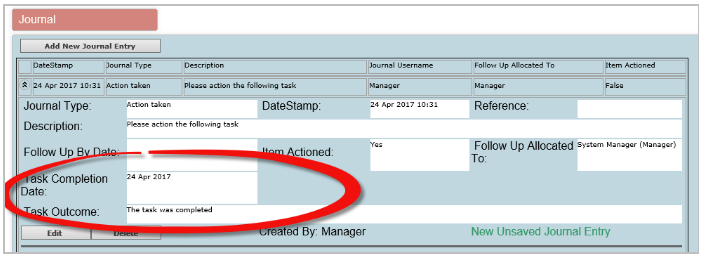


If you see this message click 'yes' to action the journal

Option B



If you see this message you must fill out two mandatory fields; Task Completion Date ❶ and Task Outcome ❷ before clicking 'yes' ❸ to action the journal. You will not be bale to action the Journal without filling out these fields. Once these fields have been filled out, they will be viewable from the Journal entry section of the feedback form.

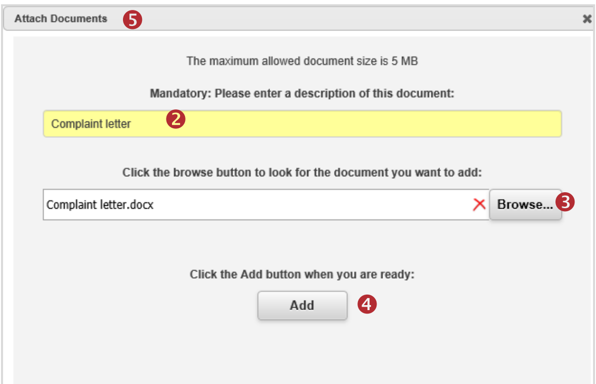


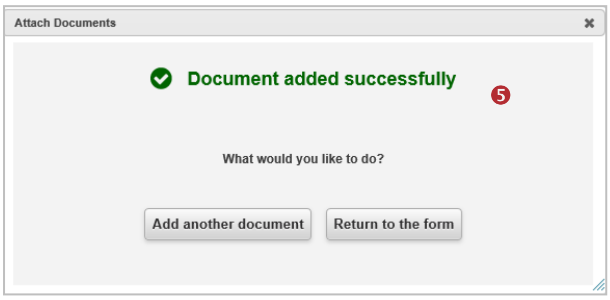
3. Press **Submit** at the bottom of the feedback to update your changes

Can I attach a file to a Notification?

Relevant files of any description, can be attached to a Feedback notification via the **Documents** section e.g. correspondence, photos, policies

1. Press the **Add Document** ❶ button
2. Enter a **Description** ❷ of the file
3. Press **Browse** ❸ to locate the file
4. Once the file is selected press **Add** ❹
5. A pop-up will appear asking if you want to add another document or return to the form❺





To view an attached document

1. Click on the **View** ❶ icon next to the document you wish to view

2. Click on the icon to view the **Document Details** and **Document Review History** ❷

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

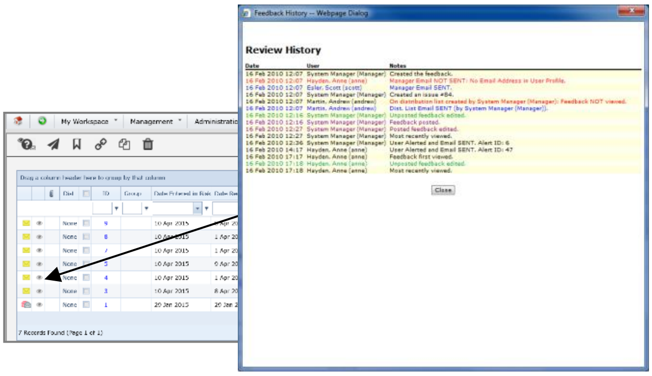
Next to each feedback notification on your feedback list there is a coloured flag which represents your viewing status of your feedback

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

To view the Review History of a feedback notification

1. Click on the **Eye** next to the feedback

The **Review History** will display. This information will enable you to see if there were amendments made to the Feedback that you were perhaps waiting on



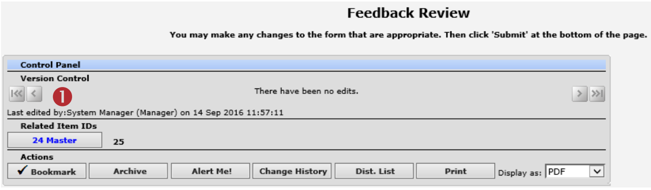
How do I view the changes that have been made to the feedback notification?

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

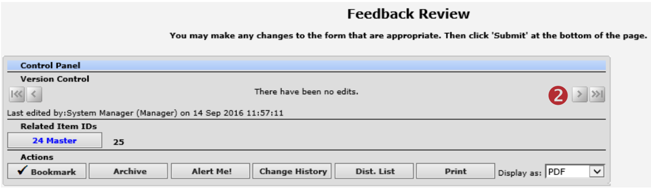
Note: *There is no history to changes made to Journals, Documents and Issues; however there is an entry in the Review History documenting who has made changes in these areas of the Feedback Notification*

To view the changes made to the feedback

1. In the Control Panel you will need to click on the **Previous Edit** ❶ icons to view the previous versions of the Feedback Notification



2. To return to the most current version (modifications can only be made on the current version) click on the **View Last Edit** ❷ icon



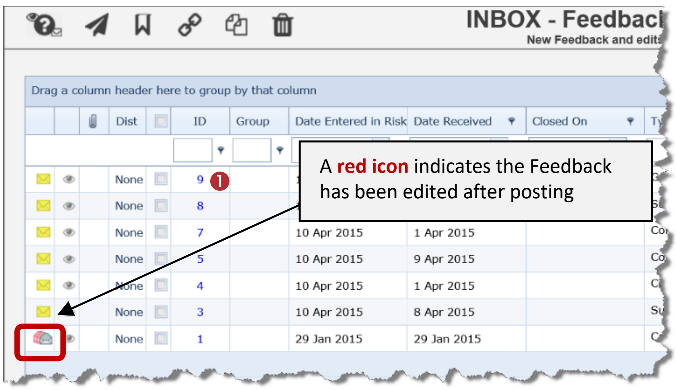
Reviewing & Posting Edited Posted Feedback

After a Feedback Notification has been posted, it can be edited e.g. documenting conversations with the Complainant, attaching correspondence, closing the Feedback notification. Changes made to fields on the Feedback Entry form after a Feedback notification has been posted will be displayed in a **red box** underneath the modified field. It will be your responsibility to accept these changes if they are to be included in the Feedback notification, or not accept them if you feel that the change should not be part of the master version of the Feedback notification

Note: *Changes to the Journal, Action, Issue or Document sections will not display a red box under the changes as there is no history to these changes. However for Journals, Actions and Issues a reference to any changes will be displayed in the Review History and for Documents by clicking on the*  *icon next to the attached document a Review History can be viewed*

1. If you wish to view changes from the Inbox, click on the Status Flag (as described on the previous page) next to the edit posted Feedback (indicated by a **red icon**  where fields on the Feedback notification have been modified)

2. To view the Feedback notification, click on the Feedback **ID** ❶



3. All changes to fields on the Feedback Notification (except those changes in Journals, attached documents or the fields in the Items pop-up window) will appear in a **red box** ❷ under the modified field

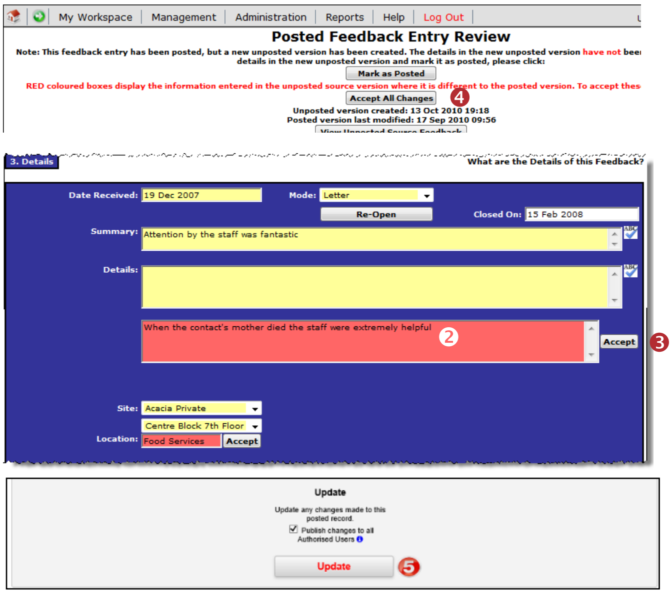
4. If you with to **accept changes on an individual field** press the respective **Accept** ❸ or **Accept Block** button

   - Those changes not accepted will not be included in the master version of the Feedback but will remain in the unposted version of that Feedback

5. Alternatively, if you wish to **accept all changes** in the feedback press the **Accept All Changes** ❹ button

6. Press **Update the Posted Record** ❺ to update the posted version of the notification

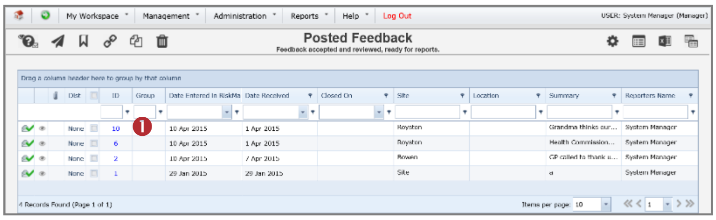
   - The Feedback will be removed from your Inbox view and the updated changes will be available to view in the "Posted Feedback" listing



How do I access Posted Feedback?

Posted Feedback Notifications are accessible by selecting

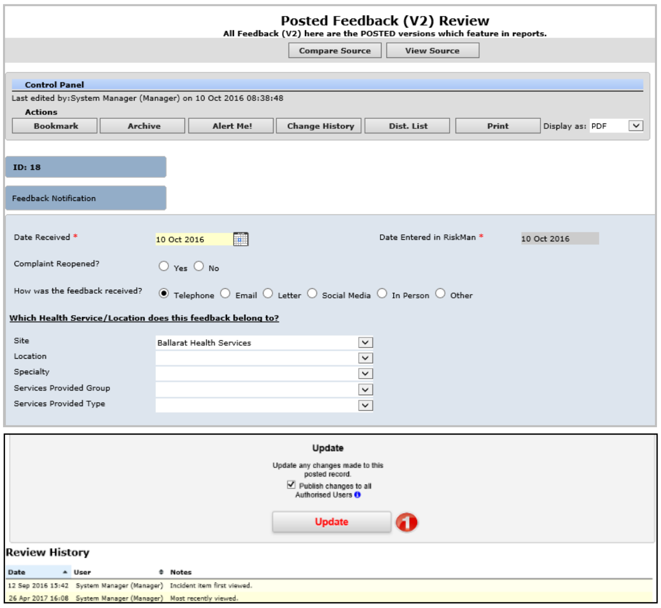
1. *Management -> Enquiry -> Posted Feedback*



2. To view and edit a posted feedback notification, click on the Feedback **ID;** make changes as required and press the **Update the Posted Record** ❶button at the bottom of the notification to save your changes

   - The posted Feedback will be updated will be updated directly and a copy of the changes will be made available to the equivalent unposted version. The Feedback will not re-appear in the Inbox view

3. To return to the **Posted Feedback** page
   - Select *Management -> Enquiry -> Posted Feedback*



Features of the Posted Feedback page

Compare Source

This feature allows you to view the current posted version of the feedback notification and compare it to all the unposted versions.

If there is a difference between the current posted version and the compared unposted version, the details will appear in a **red box** under the respective field.

Updates can be made from any view by pressing the Accept button next to the fields that you wish to modify. On saving the feedback, the posted version will be updated directly

View Source

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

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

***Note:** This function is not commonly used*

Can I delete a Feedback Notification?

Deleting feedback can be done if

- There are duplicate notifications i.e. more than one person has entered the same complaint; or
- If the feedback being entered is not acceptable as per your organisational definition e.g. A staff grievance

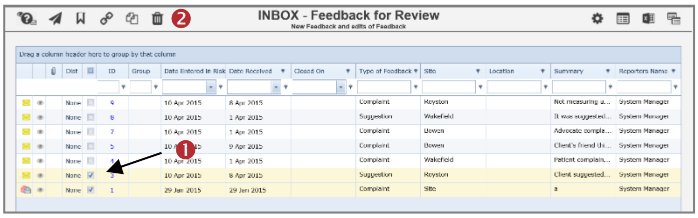
Before deleting a feedback notification it is suggested that you

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

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

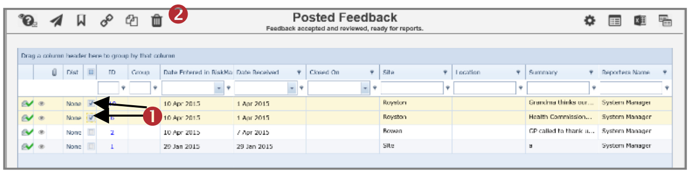
Deleting Unposted feedback

1. With the Feedback Inbox open, check the **record selector** ❶ next to the unposted Feedback notification/s that you wish to delete
2. Press the **Delete** ❷ icon. The Feedback notification/s will be flagged as deleted and will be available in the **Deleted Feedback** list if they need to be restored



To delete Posted feedback

1. With the Posted Feedback page open, check the **record selector** ❶ next to the posted Feedback notification/s that you wish to delete
2. Press the **Delete** ❷ icon. The posted Feedback notification/s will be removed from the database. The unposted versions will be flagged as deleted and will be available in the **Deleted Feedback** list if they need to be restored



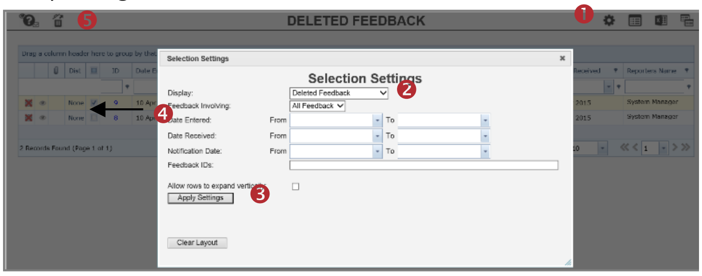
How do I restore Deleted Feedback?

Deleted Feedback notifications are located in the "**Deleted Feedback"** page.

1. From the **Feedback Inbox** page, enter Selection Settings via the icon ❶, select Display = Deleted Feedback ❷ and press Apply Settings ❸

2. Check the **record selector** ❹ next to the Feedback (you can select more than one) that you wish to restore

3. Press the **Restore** ❺ icon The Feedback will be restored to the "Inbox" view and will be ready for posting



What is a Linked Feedback notification?

A linked feedback is when one or more Feedback notifications have been linked together for a specific reason e.g. a complaint and a compliment have been received by the same person; or one person has provided multiple complaints over a period of time

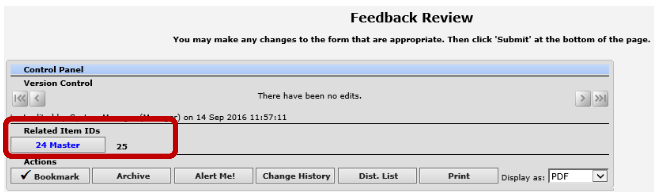
Linked Feedback can be created 3 ways

1. After the first notification is submitted, by clicking on the **"Click here to create a linked feedback"** button after a new Feedback notification has been saved
2. From the "Feedback Inbox" or "Entered Feedback" page by checking the notification you wish to link from, and pressing the **"Make Linked"** button which will open a copy of the Feedback
3. If the feedback notifications were entered separately they can be linked together using the **"Link Incidents"** function on the "Feedback Inbox" page

How can I tell if feedback has been linked?

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

***Note:** The **"Link"** column available in the **Incident Lists** page is not available in the Feedback listing pages*

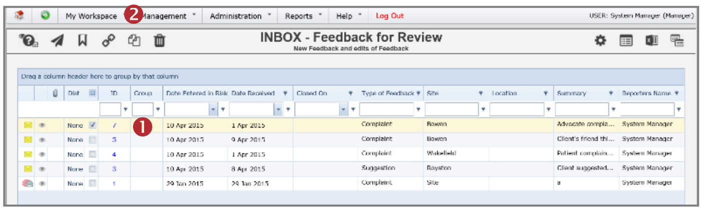


How do I create a new linked feedback from an existing notification?

If you need to create a linked feedback from an existing notification

1. On the Feedback Listing page (e.g. Feedback Inbox) click on the **Record Selector** ❶ next to the feedback you wish to create a linked feedback with

2. Press the **Clone and Link** ❷ icon



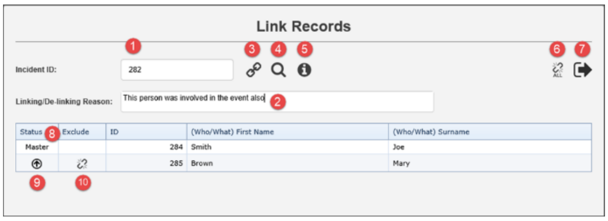
3. A copy of the Feedback notification will open. Make any changes to the feedback as required and press **Save Feedback**

4. If you then need to create another linked feedback press the **"Click here to create a related 'Linked Feedback'"** button on the **Feedback Saved** page

***Note:** The content of the fields copied when creating a linked Feedback can be modified. Please contact RiskMan support – support@riskman.net.au if changes are required*

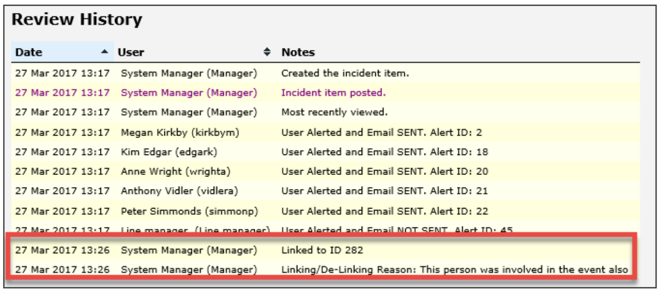
How do I link 2 or more feedback together?

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



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

2. **New**: Enter the reason you are linking/de-linking this new record. The reason will be recorded in the Review History of the master 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.

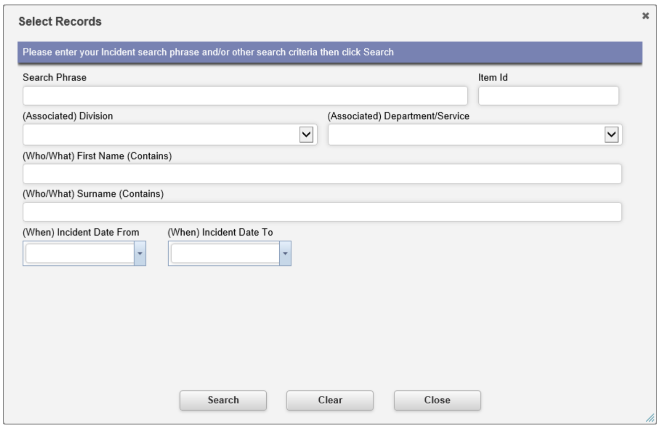


Review History

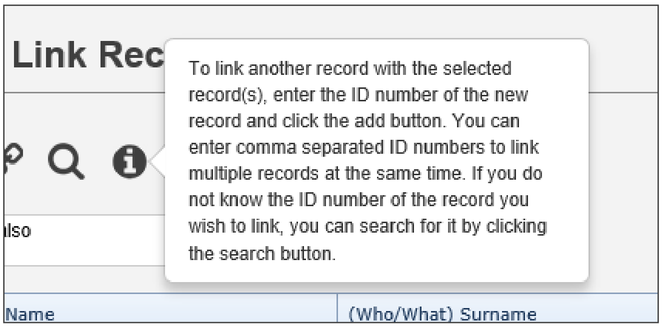
Date	User	Notes
27 Mar 2017 13:17	System Manager (Manager)	Created the incident item.
27 Mar 2017 13:17	System Manager (Manager)	Incident item posted.
27 Mar 2017 13:17	System Manager (Manager)	Most recently viewed.
27 Mar 2017 13:17	Megan Kirkby (kirkbym)	User Alerted and Email SENT. Alert ID: 2
27 Mar 2017 13:17	Kim Edgar (edgark)	User Alerted and Email SENT. Alert ID: 18
27 Mar 2017 13:17	Anne Wright (wrighta)	User Alerted and Email SENT. Alert ID: 20
27 Mar 2017 13:17	Anthony Vidler (vidlera)	User Alerted and Email SENT. Alert ID: 21
27 Mar 2017 13:17	Peter Simmonds (simmonp)	User Alerted and Email SENT. Alert ID: 22
27 Mar 2017 13:17	Line manager (Line manager)	User Alerted and Email NOT SENT. Alert ID: 45
27 Mar 2017 13:26	System Manager (Manager)	Linked to ID 282
27 Mar 2017 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 ❶

4. **New**: Search tool helps you find a record so that you don't necessarily need to know its ID number:



5. This info icon will display a tool tip, providing the user with advice on using the tool:



6. De-link all records (previously the "Dissolve Group" button)

7. Click to exit the dialog

8. **New**: The Master record will now always be the first one listed

9. Click to promote a record to be the Master record

10. Click to de-link the selected record

What happens if I go on Leave?

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