Introduction

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

Role of the Line Manager

When a feedback notification 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 notification or
- From the menu select *My Workspace -> Review My -> Feedback.* This will display a list of feedback notifications entered by you; your staff; or those that you have been granted permission to via an alert, distribution list or a Journal

Review the details of the Feedback

- 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

Investigate any Complaints/Enquiries/Suggestions

- Return to the Feedback (via Bookmark or Entered Feedback page)
- Acknowledge complaints/enquires/suggestions and update the **Date Acknowledged** field
- 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**

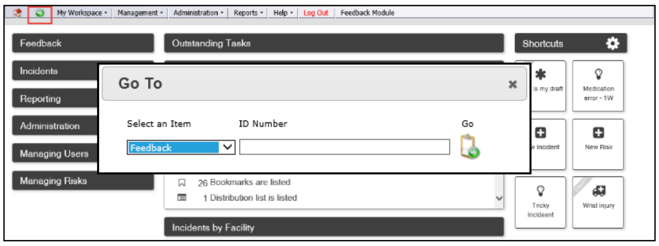
Close the Feedback Notification

- Complaints may need to be resolved within a specific period of time e.g. within 30 days of being received. The Line Manager's role maybe to 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
- **Optional:** Mark the Feedback notification as **Finalised**

Reviewing Feedback

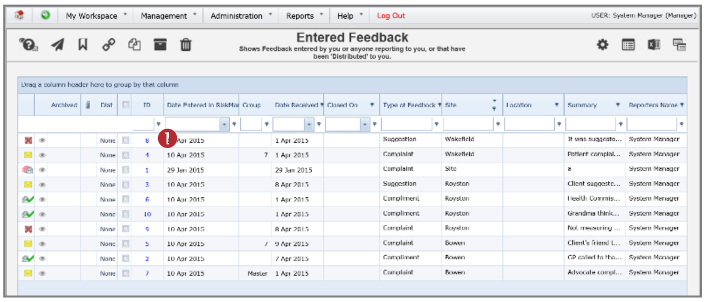
If I know the ID of the Feedback Notification you can use the "Go To" function to locate the notification

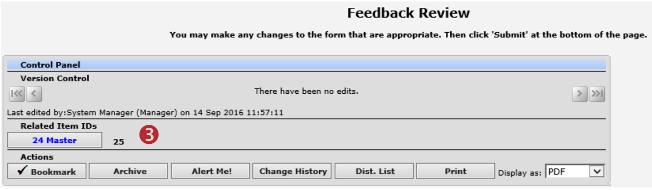
1. Press the **Go To** icon on the menu or press **ALT-G**
2. Select **Item = Feedback** and enter the **ID**
1. Press **Enter** or the **Go** button
2. If you have permission to the notification, it will be displayed

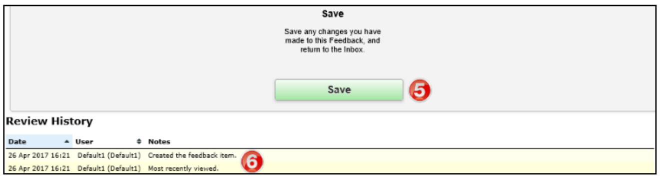


To view a feedback notification from the Entered Feedback page

1. Click on the Feedback **ID** ❶





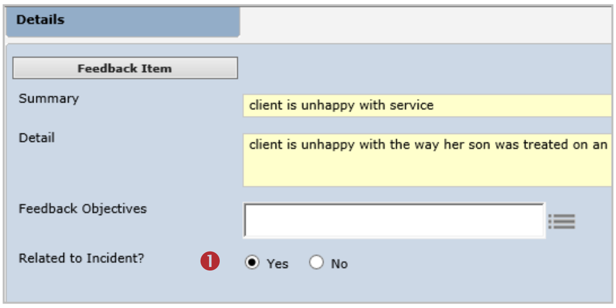


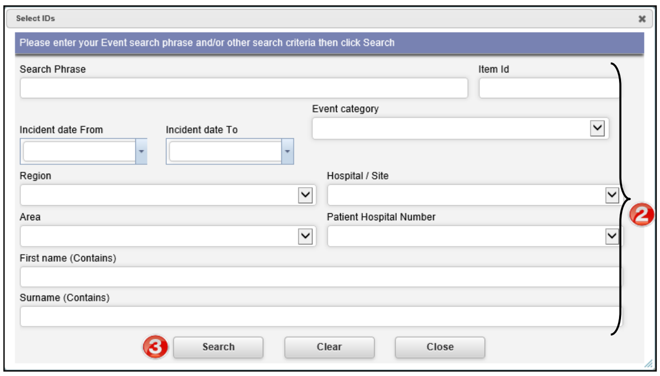
1. Review the feedback and investigate as required
   - Fields displayed in yellow ❷ are **mandatory** and must be completed before saving the notification
   - If you receive a complaint and compliment from the same person a linked feedback may have been created. If so, the ID's of the linked feedback 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** ❻ 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 notification, press **Save Feedback** ❺

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 Entered Feedback page
2. On the Feedback Review page, select 'yes' for **Related to Incident?** ❶
   - A Search window will display
3. Enter your search criteria ❷ *(If you have entered a Medical/UR/Client Number in the Consumer section, it will automatically be displayed in the **Client ID** field in the Search window)*
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



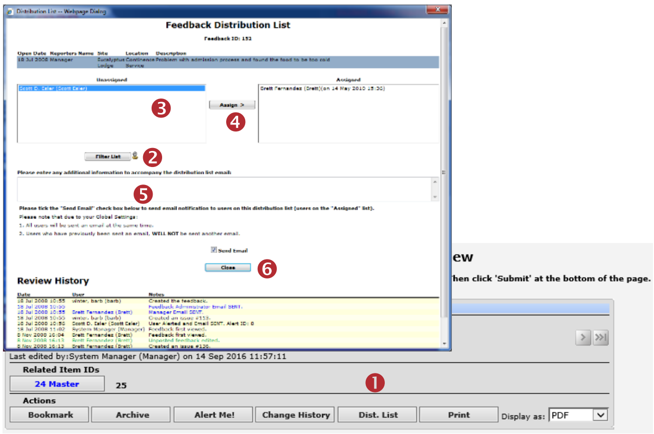


How do I let others know of the feedback?

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*



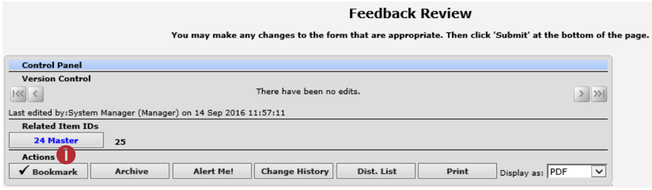
Can I view comments sent in a Distribution List?

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.

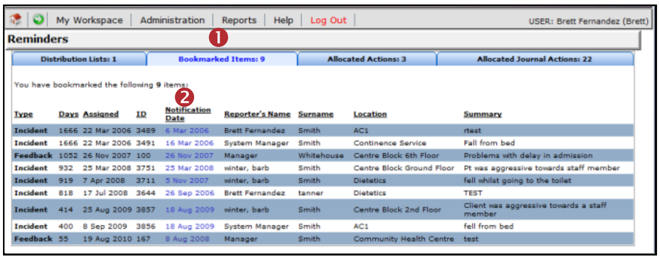
To bookmark a Feedback Notification, click on the **Bookmark** ❶ button



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

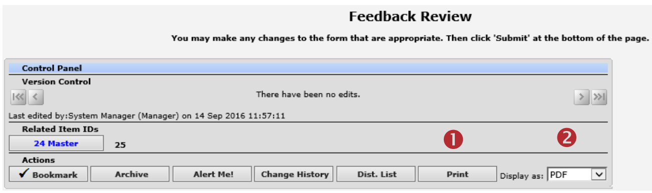
1. To open the Feedback, click on the **Notification Date** ❷ link
2. To remove the bookmark, click the **Bookmark** button on the **Control Panel**



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

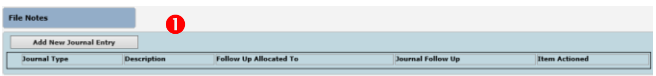


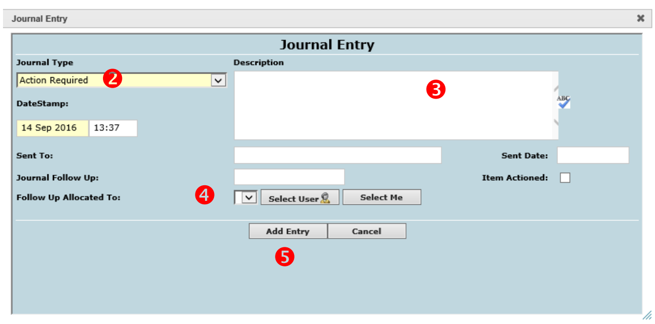
How do I add a Progress/File Notes or assign a task?

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 **Save** ❺
6. If the journal is **not** allocated to a user, it will automatically be actioned once the feedback is saved
7. If the Journal **is** 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

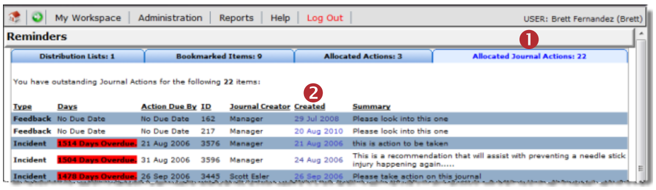




How can I view a list of outstanding tasks assigned to me?

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

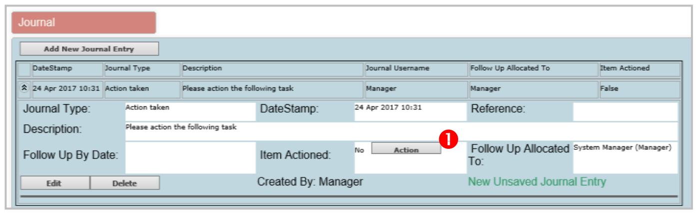
1. Click on the **Created** ❷ date link to open the Feedback
2. Once you have actioned the Journal it will be removed from this list



How do I action a Journal?

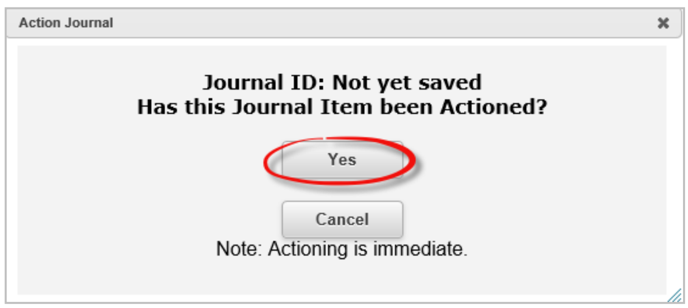
If a Journal is assigned to you, to ensure the creator of the journal knows that you have completed the task, the Journal should be **actioned.** To action a journal task follow the below steps:

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



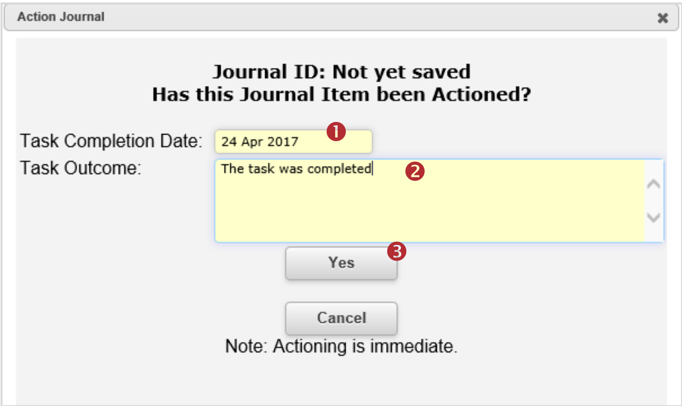
2. A pop-up will appear asking if the journal item has been actioned. Depending on your system configuration, you will see either of the below messages:

Option A

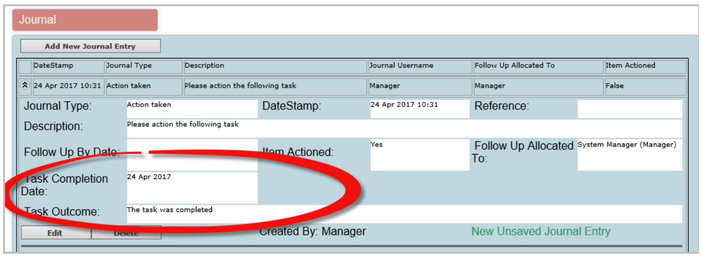


If you see this message click 'yes' to action the journal

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.

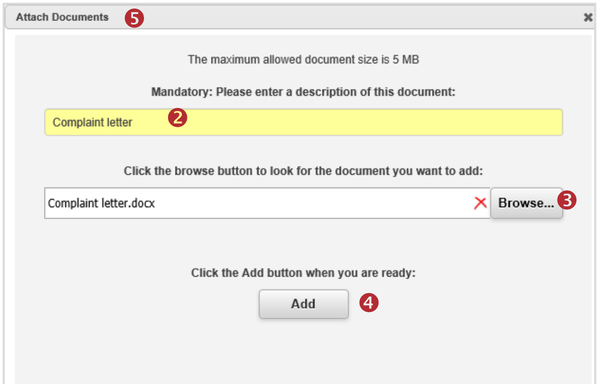


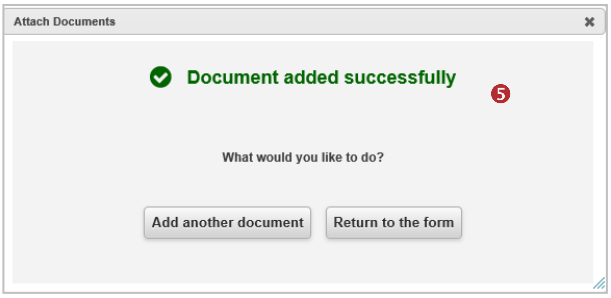
3. Press **Submit** at the bottom of the feedback to update your changes

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 form ❺



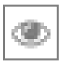


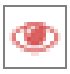
To view an attached document

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

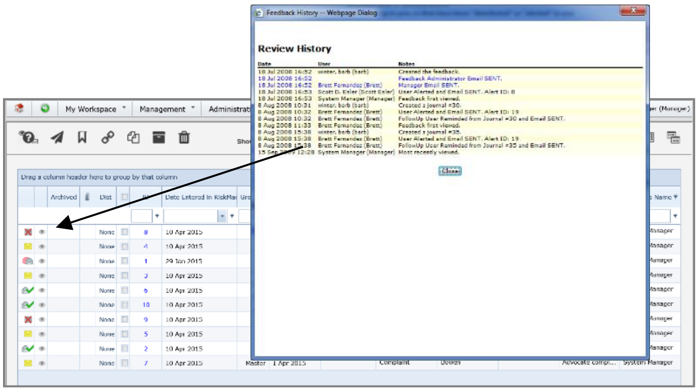
 - You have viewed the feedback and there have been no modifications

 -There have been modifications since you last viewed the feedback

 - You have not yet viewed this feedback notification

To view the Review History of a feedback notification

1. Click on the **Eye** next to the feedback
2. 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



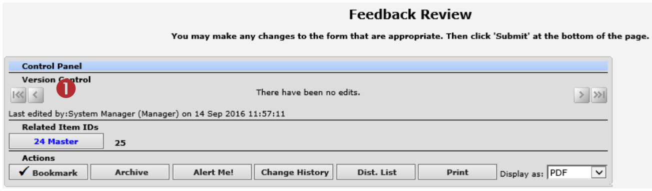
How do I view the changes that have been made to the feedback notification?

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

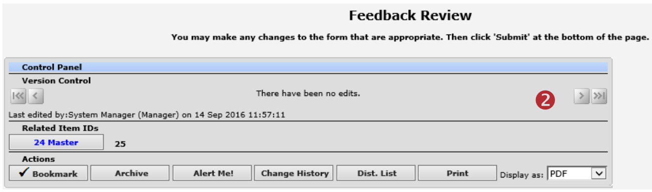
***Note:** There is no history to changes made to Journals, Documents and Issues; however there is an entry in the Review History documenting who has made changes in these areas of the Feedback Notification*

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

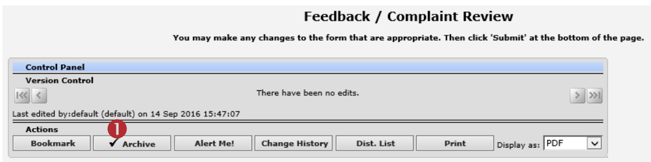


If I have finished working on a Feedback, how do I hide it from my Feedback List?

If you have completed working with a Feedback Notification e.g. if a complaint, it is closed; and you no longer require the feedback to be shown in your "Entered Feedback" list, you can **"Archive"** the Feedback, either from an opened notification or from your Entered Feedback page

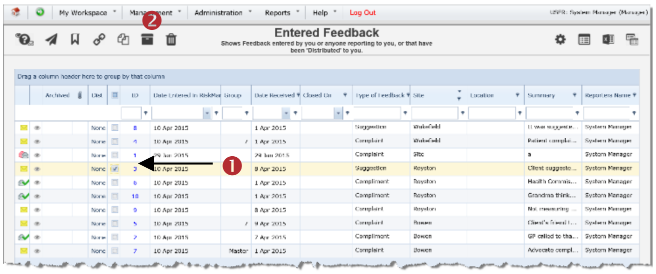
To archive Feedback from an opened Notification

1. Click on the **Archive** ❶ button
2. Once archived a tick will display next to this button, an entry will be added to the Review History of the notification and it will be hidden from your Entered Feedback list



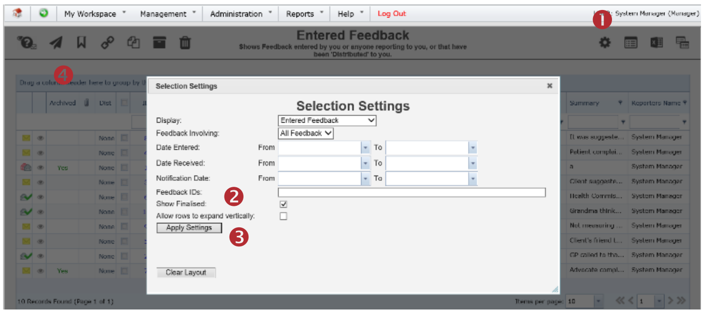
To archive Feedback from your Entered Feedback page

1. Check mark ❶ the feedback that you would like archived
2. Press the **Archive** ❷ icon  The feedback will be hidden from your Entered Feedback List



How do I view a feedback I have archived?

1. Go to Selection Settings by clicking on the  icon ❶
2. Select **Show Archived** ❷ and click **Apply Settings** ❸
3. An Archived ❹ column will display, indicating which feedback has been archived. Archived feedback can still be opened and modified if required



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

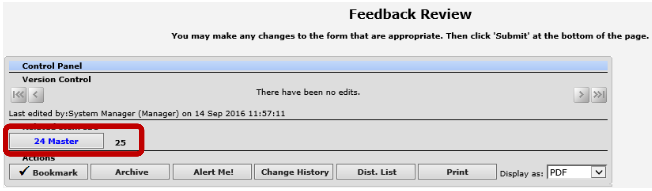
Linked Feedback can be created 3 ways

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 "Entered Feedback" page by checking the notification you wish to link from, and pressing the **"Clone and Link"**  icon which will open a copy of the Feedback
3. If the feedback notifications were entered separately they can be linked together using the **"Link Records"**  icon on the "Entered Feedback" page

How can I tell if feedback has been linked?

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

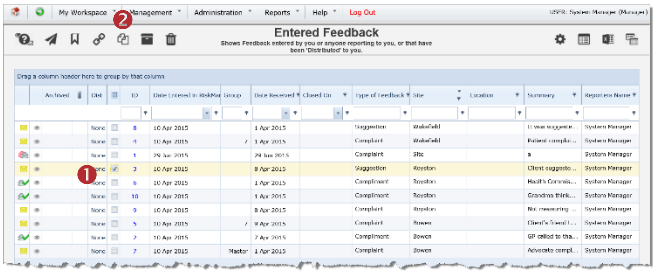
***Note:** The **"Group"** column available in the **Incident Lists** page is not available in the Feedback listing pages.*



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

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

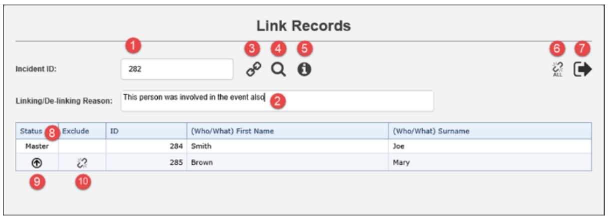
1. On the Entered Feedback page, click on the **Record Selector** ❶ next to the feedback you wish to create a linked feedback with
2. Press the **Clone and Link** ❷ icon 



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 after saving the notification press the **"Click here to create a related 'Link Feedback'"** button on the **Feedback Saved** page

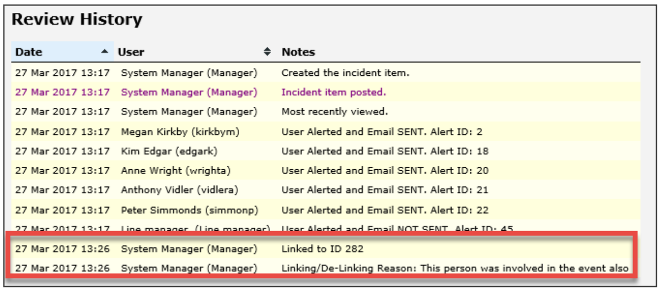
How do I link 2 or more feedback together?

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



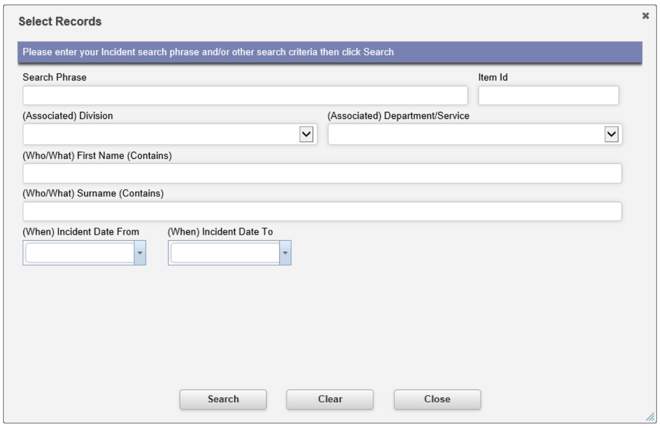
1. Add the ID of a record you wish to link

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.

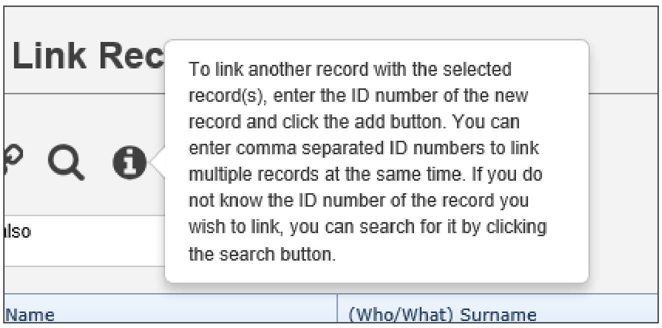


3. Click to link the record you entered in ❶

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

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 -> Reference Guides*

What happens if I go on Leave?

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