#### 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

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Administration         Select an Item         ID Number         Go           Managing Users         Feedback         V         Image: Comparison of the second		e Incident
Maneging Risks	~	Trisky Incident
Incidents by Facility		

#### To view a feedback notification from the Entered Feedback page

1. Click on the Feedback ID 0

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	Archived	4	Dist		TD ID	Date Entered in RiskHa	Group	Date Received 1	Closed On 🔹	Type of Feedback 1	Site 💡	Location *	Summary *	Reporters Name
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			None	П	5	10 Apr 2015	1	9 Apr 2015		Complaint	Bowen		Client's friend L	System Menage
×	۰		None	11	2	10 Apr 2015		7 Apr 2015		Compliment	Bowen		CP called to tha	System Hange
			Note	11	7	10 Apr 2015	Master	1 Apr 2015		Complaint	Bowen		Advocate compl	System Monage



			Feedback	Review		
	You may make an	vy changes to the for	rm that are appro	priate. Then clicl	< 'Submit' at the bo	ttom of the page.
Control Panel						
Version Control		There have been no	edits.			> >>
Last edited by:System Manager	r (Manager) on 14 Sep 2016	11:57:11				
Related Item IDs 24 Master 25	6					
Actions						
✓ Bookmark Arch	nive Alert Me!	Change History	Dist. List	Print	Display as: PDF	~
Details						
Feedback Item			_			
Summary	client is unhappy with service		2			
Detail	client is unhappy with the way	her son was treated on	an excursion to the s	vimming pool		).
Feedback Objectives		=				
Related to Incident?	○ Yes ○ No					
Has an attempt been made to resolve the feedback matter?	○ Yes ○ No					

				Save
				Save any changes you have made to this Feedback, and return to the Inbox.
				readin to the mook.
				Save 5
				<b>v</b>
Review H	story			
Date	▲ User	٥	Notes	
26 Apr 2017 16	21 Defau	ti (Defaulti)	Created the feedback item.	6
26 Apr 2017 16	21 Defau	t1 (Default1)	Most recently viewed.	<b>U</b>

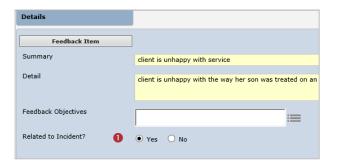
- 1. Review the feedback and investigate as required
  - Fields displayed in **yellow 2** are **mandatory** and must be completed before saving the notification
  - If you receive a complaint and compliment from the same person a linked feedback may have been created. If so, the ID's of the linked feedback will appear in the Control Panel of the reviewed Feedback. Click on the respective ID S to view the other feedback notifications linked with the displayed notification. <u>Each feedback in the link</u> <u>needs to be reviewed, updated and saved</u> <u>separately</u>
  - The Review History ③ 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

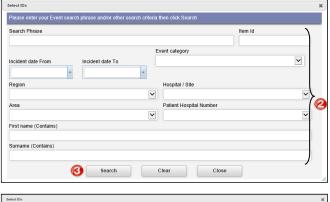
If changes are made to the feedback notification, press
 Save Feedback 6

#### 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
- On the Feedback Review page, select 'yes' for Related to Incident? 1
  - 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
- Check mark ④ 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 6





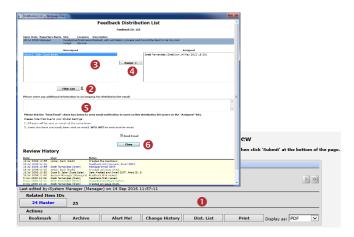


#### How do I let others know of the feedback?

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 0** button
- Search for the users using the Filter List ② option e.g. filter by the user's first or last name
- Highlight the user in the Unassigned List <sup>(2)</sup> and press
   Assign <sup>(3)</sup>
- 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 Feedback. This comment will be included in the distribution email
- 6. Press Close @
- 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 1** button

	You may make ar	Feedback Review	-
Control Panel			
Version Control			
<< <		There have been no edits.	> >>1
ast edited by:System	anager (Manager) on 14 Sep 2016	11:57:11	
Related Item IDs			
24 Master	25		
Actions			-
✓ Bookmark	Archive Alert Me!	Change History Dist. List Prin	t Display as: PDF V

## How do I view my bookmarked feedback?

All your bookmarked feedback (and incidents) will be listed in your **Bookmarked Items 1** list under your *My Workspace -> Reminders & Alerts* page

- To open the Feedback, click on the <u>Notification Date</u> link
- 2. To remove the bookmark, click the **Bookmark** button on the **Control Panel**

teminde	rs			- 0							
Dist	ributio	on Lists: 1	1	Bookmark	ed Items: 9	Alloc	ated Actions: 3	Allocated Journal Actions: 22			
You have t		arked the foll	owing f	Notification Date	Reporter's Name	Sumame	Location	Summary			
Incident	1666	22 Mar 2006	3489	6 Mar 2006	Brett Fernandez	Smith	AC1	rtest			
Incident	1666	22 Mar 2006	3491	16 Mar 2006	System Manager	Smith	Continence Service	Fall from bed			
Feedback	1052	26 Nov 2007	100	26 Nov 2007	Manager	Whitehouse	Centre Block 6th Floor	Problems with delay in admission			
Incident	932	25 Mar 2008	3751	25 Mar 2008	winter, barb	Smith	Centre Block Ground Floor	Pt was aggressive towards staff member			
Incident	919	7 Apr 2008	3711	5 Nov 2007	winter, barb	Smith	Dietetics	fell whilst going to the toilet			
Incident	818	17 Jul 2008	3644	26 Sep 2006	Brett Fernandez	tanner	Dietetics	TEST			
Incident	414	25 Aug 2009	3857	18 Aug 2009	winter, barb	Smith	Centre Block 2nd Floor	Client was aggressive towards a staff member			
Incident	400	8 Sep 2009	3856	18 Aug 2009	System Manager	Smith	AC1	fell from bed			
Feedback		19 Aug 2010	167	8 Aug 2008	Manager	Smith	Community Health Centre	test			

### 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<sup>™</sup>, PDF or Excel<sup>™</sup>

- 1. In the Control Panel, select an output format 0
- 2. Press Print 2

			Fe	edback F	leview		
		You may make an	y changes to the form tha	it are appropri	ate. Then click	'Submit' at the	bottom of the pag
Control Panel							
Version Control							
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ast edited by:System	Manager (Manag	er) on 14 Sep 2016	11:57:11				
Related Item IDs					•		6
24 Master	25				U		•
Actions							
		Alert Mel					

# 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 **1**
- 2. Select a Journal Type 😢
- 3. Enter a **description (**) 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 **4**
  - Assign a user in the Follow-up User field <sup>(a)</sup> press the Filter <sup>(a)</sup> 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 6
- If the journal is <u>not</u> allocated to a user, it will automatically be actioned once the feedback is saved
- 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
- 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

Add New Journal E	Description	Follow Up Allocated To	Journal Follow Up	Item Actioned
Journal (Me	peacription	ponon op macarea ro	pournal rollow op	Julian Actioned
ournal Entry				
		Journal Er	ntry	
Journal Type	_	Description		
Action Required	2	~	8	
DateStamp:			•	ABC
14 Sep 2016 13	:37			×
Sent To:				Sent Date:
Journal Follow Up:				n Actioned:
Follow Up Allocated	To:	4 Select User &	Select Me	
		Add Entry	Cancel	
		6		

# 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 Feedback
- 2. Once you have actioned the Journal it will be removed from this list

1	2	My Workspace	Administratio	n   Re	eports   Help	Log Out		USER: Brett Fernandez (Bre	tt)			
R	eminde	rs						0	ĥ			
T	Distribution Lists: 1 Bookmarked Items: 9 Allocated Actions: 3 Allocated Journal Actions: 22											
	rou have outstanding Journal Actions for the following 22 Items:											
l	Feedback	No Due Date	No Due Date	162	Manager	29 Jul 2008	Please look into this	one				
	Feedback	No Due Date	No Due Date	217	Manager	20 Aug 2010	Please look into this	one				
	Incident	1514 Days Overdue.	21 Aug 2006	3576	Manager	21 Aug 2006	this is action to be ta	sken				
1	Incident	1504 Days Overdue.	31 Aug 2006	3596	Manager	24 Aug 2006	This is a recommend injury happening aga	dation that will assist with preventing a needle stick				
	Incident	1478 Days Overdue.	26 Sep 2006	3445	Scott Esler	26 Sep 2006	Please take action o	n this journal	1			

## 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> To action a journal task follow the below steps:

Press the Action 

 button next to the respective Journal

	Add New Journ	al En	try					
Di	DateStamp Journal Type		Description		Journal Username	Follow Up Allocated To	Item Actioned	
* 24	24 Apr 2017 10:31 Action taken Ple		Please action the fol	lowing task	Manager	Manager	False	
Jou	irnal Type:		Action taken		DateStamp:	24 Apr 2017 10:31	Reference:	
Des	scription:		Please action t	he following task				
Fol	low Up By Da	ate:			Item Actioned:	Vo Action	Follow Up Allocated Syste To:	em Manager (Manage

 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**

Action Journal		>
Has	Journal ID: Not yet saved s this Journal Item been Actioned?	
	Yes	
	Cancel Note: Actioning is immediate.	
	Note: Actioning is immediate.	

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



Action Journal		×
	Journal ID: Not yet saved nis Journal Item been Actioned?	
Task Completion Date:	24 Apr 2017	
Task Outcome:	The task was completed 2	~
		~
	Yes	
	Cancel	
	Note: Actioning is immediate.	

If you see this message you must fill out two mandatory fields; Task Completion Date ① and Task Outcome ② before clicking 'yes' ③ 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.

	Journal						
	Add New Journal En	try					
	DateStamp Journ	al Type	Description		Journal Username	Follow Up Allocated To	Item Actioned
	24 Apr 2017 10:31 Actio	n taken	Please action the fol	lowing task	Manager	Manager	False
	Journal Type:	Action taken		DateStamp:	24 Apr 2017 10:31	Reference:	
	Description:	Please action th	he following task				
	Follow Up By Date:	_		Itom Actioned:	Yes	Follow Up Allocated St To:	rstem Manager (Manager)
ſ	Task Completion Date:	24 Apr 2017					
	Task Outcome:	The task was c	ompleted				
	Edit De	iete		Created By: Manager		New Unsaved Journal	Entry

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 1** button
- 2. Enter a **Description 2** of the file
- 3. Press **Browse (**) to locate the file
- 4. Once the file is selected press Add ④
- A pop-up will appear asking if you want to add another document or return to the form 6

Add Document		
Attach Documents 5		
The maximum allowed document size is 5 MB		
Mandatory: Please enter a description of this docu	ment:	
Complaint letter 2		
Click the browse button to look for the document you we	ant to add:	
Complaint letter.docx	×	Browse
Click the Add button when you are ready:		

(	Document add	ed successfully	6
	What would you	like to do?	
ŀ	Add another document	Return to the form	

#### To view an attached document

- 1. Click on the **View** icon next to the document you wish to view
- 2. Click on the **1** icon to view the **Document Details** and **Document Review History 2**

ID	Document Name	Description	Date Atlached	Attached by	Size (KB)	Actions
500037	Complaint letter.docx	Complaint letter	18 Apr 2017 11:44	Manager	427	© ()

# 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

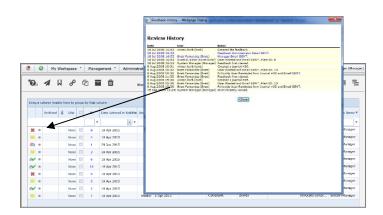
-There have been modifications since you last viewed the feedback



- 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

 In the Control Panel you will need to click on the Previous Edit 

 icons to view the previous versions of the Feedback Notification

		You may make a		Feedback		c 'Submit' at the bottom of the p
Control Panel						
Version Control			There have been no ed	its.		> >>1
ast edited by:System	Manager (Manag	er) on 14 Sep 2016	11:57:11			
Related Item IDs						
24 Master	25					
Actions						
✔ Bookmark	Archive	Alert Me!	Change History	Dist. List	Print	Display as: PDF 🗸

 To return to the most current version (modifications can only be made on the current version) click on the View Last Edit <sup>2</sup> icon

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Control Panel							
Version Control							
<< <			There have been no e	dits.		2	> >>1
st edited by:System I	Manager (Mana	ger) on 14 Sep 2016	11:57:11				
Related Item IDs							
24 Master	25						
Actions							
✔ Bookmark	Archive	Alert Me!	Change History	Dist. List	Print	Display as: PDF	

# 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 **1** button
- 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

	,	Feedback / Complaint R	
Control Panel			
		There have been no edits.	> >>1
Last edited by:defaul	t (default) on 14 Sep	2016 15:47:07	
Bookmark	Archive	Alert Me! Change History Dist. List Print	Display as: PDF 🗸

#### To archive Feedback from your Entered Feedback page

- Check mark 

   the feedback that you would like archived
- 2. Press the **Archive** icon The feedback will be hidden from your Entered Feedback List

									Ente	red Feed	hack				
0		1	М	°	G	2	Û	Shows Fe	edback entered b		sporting to you, or th	hat have		¢ (	II II II
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v	*			None	11	10	10 Apr 2015		1 Apr 2015		Compliment	Reyston		Grandma think	System Manager
	æ			None			10 Apr 2015		8 Apr 2015		Complaint	Reyston		Not measuring	System Namper
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				None		7	10 Apr 2015	Hastor	1 Apr 2015		Compleint	Bowen		Advecte compl	System Menager

#### How do I view a feedback I have archived?

- Go to Selection Settings by clicking on the icon 1
- Select Show Archived ② and click Apply Settings
   ⑤
- An Archived column will display, indicating which feedback has been archived. Archived feedback can still be opened and modified if required

0		1	W a	P	ළ	🖬 🛍 Shows Fe	edback entered by you or	Feedback	ou, or that have	0		-
		<b>.</b>	der here I			Selection Settings	_		_	×		
		Archived	il v	st	2 a		Selection	n Settings		Summary	• Reporters	Name *
						Display:	Entered Feedback	~ ~				
	æ		N			Feedback Involving:	All Feedback 🗸			Et was augueste	System M	lanoger
						Date Entered: From	m	• То		Patient complai	System M	lanoger
50	-					Date Received: From	m	- To	-	a	System Ma	- Ianager
	-					Notification Date: From	m	• To	*	Client supposts	System M	lanager
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### 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

- 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

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.

	Feedback Review You may make any changes to the form that are appropriate. Then click 'S	Submit' at the bottom of the pay
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Version Control		
K <	There have been no edits.	> >>1
Last edited by:System Mana	ger (Manager) on 14 Sep 2016 11:57:11	
24 Master 2		
Actions		
✓ Bookmark A	chive Alert Me! Change History Dist. List Print	Display as: PDF 🗸

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

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

 On the Entered Feedback page, click on the Record Selector 

 next to the feedback you wish to create a linked feedback with



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

# RLDatix



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

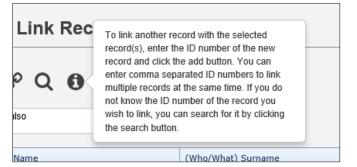
2. **New**: Enter the reason you are linking/de-linking this new record. The reason will be recorded in the Review History of the <u>master</u> record. Another Review History entry will be made in the master record while performing actions like linking, de-linking, changing the master record, and dissolving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

Date 🖌	User \$	Notes
27 Mar 2017 13:1	7 System Manager (Manager)	Created the incident item.
27 Mar 2017 13:1	7 System Manager (Manager)	Incident item posted.
27 Mar 2017 13:1	7 System Manager (Manager)	Most recently viewed.
27 Mar 2017 13:1	7 Megan Kirkby (kirkbym)	User Alerted and Email SENT. Alert ID: 2
27 Mar 2017 13:1	7 Kim Edgar (edgark)	User Alerted and Email SENT. Alert ID: 18
27 Mar 2017 13:1	7 Anne Wright (wrighta)	User Alerted and Email SENT. Alert ID: 20
27 Mar 2017 13:1	7 Anthony Vidler (vidlera)	User Alerted and Email SENT. Alert ID: 21
27 Mar 2017 13:1	7 Peter Simmonds (simmonp)	User Alerted and Email SENT. Alert ID: 22
27 Mar 2017 13-1	/ Line manager (Line manager)	User Alerted and Email NOT SENT. Alert ID: 45

- 3. Click to link the record you entered in 0
- 4. **New**: Search tool helps you find a record so that you don't necessarily need to know its ID number:

Search Phrase		Item Id		
Search Filiase			item id	
(Associated) Division		(Associated) Departm	nent/Service	
				~
Who/What) First Name (Cont	ains)			
Who/What) Surname (Contai	16)			
(mormal) oumane (oomal				
When) Incident Date From	(When) Incident Date To			
·	•			

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



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

- 7. Click to exit the dialog
- 8. **New**: The Master record will now always be the first one listed
- 9. Click to promote a record to be the Master record
- 10. Click to de-link the selected record

# 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*