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

Wr Writspare - Menugement - Administration - Reports - Help - Log Out - Feedback Houlde Feedback Outstanding Taske		Shortcuts 🄅
Reporting Go To	×	is my draft Medication error - 1W
Administration Select an Item ID Number Go Managing Users Feedback V Image: Comparison of the second		Rew Flax
Maneging Risks	~	Trisky Incident
Incidents by Facility		

To view a feedback notification from the Entered Feedback page

1. Click on the Feedback ID 0

0	1	М	°	G		Û	Shows Fe	Ente edback entered b bee	ered Feed y you or anyone in en 'Distributed' to	Iback eporting to you, or t you.	hat have) پ	
Drag	a column ho	eder he	re to g	roup I	ry that o	column								
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										+	*	*		
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۲	۰		None	11	1	29 Jan 2015		29 Jan 2015		Complaint	Site		8	System Manage
	*		None		3	10 Apr 2015		8 Apr 2015		Suggestion	Royston		Client suggests	System Hanage
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	۲		Note		7	10 Apr 2015	Master	1 Apr 2015		Complaint	Bowen		Advocate compl	System Monage



	Feedback Review	
	You may make any changes to the form that are appropriate. Then click 'Submit' at the bottom of th	e page.
Control Panel		
Version Control	There have been no edits.	
Last edited by:System Manager	(Manager) on 14 Sep 2016 11:57:11	
Related Item IDs 24 Master 25	8	
Actions		
✓ Bookmark Arch	ive Alert Me! Change History Dist. List Print Display as: PDF 🗸	
Details		
Feedback Item		
Summary	client is unhappy with service	AD
Detail	client is unhappy with the way her son was treated on an excursion to the swimming pool	Û
Feedback Objectives	=	
Related to Incident?	○ Yes ○ No	
Has an attempt been made to resolve the feedback matter?	O Yes O No	

					Save
					Save any changes you have made to this Peedback, and return to the Inbox.
					Save 3
Review	Hist	ory			
Date	*	User	٥	Notes	
26 Apr 2017	16:21	Default1	(Default1)	Created the feedback item.	8
26 Apr 2017	16:21	Default1	(Default1)	Most recently viewed.	9

- 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
- 2. On the Feedback Review page, select 'yes' for **Related** to Incident? **1**
 - A Search window will display
- 3. Enter your search criteria 2 (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

Details	
Feedback Item	
Summary	client is unhappy with service
Detail	client is unhappy with the way her son was treated on an
Feedback Objectives	
Related to Incident?	● Yes ○ No





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 ⁽²⁾ and press
 Assign ⁽³⁾
- 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** • button

	Feedback Review You may make any changes to the form that are appropriate. Then click 'S	ubmit' at the bottom of the pa
Control Panel		
Version Control		
<< <	There have been no edits.	> >>1
Last edited by:System	Manager (Manager) 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 🗸

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**

🐲 😜	My W	orkspace	Adn	ninistration	Reports Help	Log Out	1	USER: Brett Fernandez (Brett)
Reminde	rs			Ū				
Dist	ributio	on Lists: 1		Bookmark	ed Items: 9	Alloca	ated Actions: 3	Allocated Journal Actions: 22
You have b	Days	arked the folk	owing f	9 items: 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	55	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[™], PDF or Excel[™]

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

		You may make a	ny changes to the for	Feedback	Review	k 'Submit' at i	he bottom of the p
Control Panel							
Version Control							
I<< <			There have been no e	edits.			> >>1
ast edited by:System N	lanager (Mana	ger) on 14 Sep 2016	11:57:11				
Related Item IDs					•		6
24 Master	25				U		4
Actions							
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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 ^(a) press the Filter ^(a) 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

Journal Type	Description	Follo	w Up Allocated To	Journal Follow Up	Item Action	ed
ournal Entry						
			Journal E	ntry		
lournal Type	_		Description			
Action Required	2	~		0		
DateStamp:				•	ABC	
14 Sep 2016 13:	37				×	
Sent To:					Sent Date:	
Journal Follow Up:				I	em Actioned:	
Follow Up Allocated	To:	4	V Colort Hore ®	Select Me		
onon op moented		•	- Select Oser 2	buccerre		
			Add Entry	Cancel		
			•			
			•			

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** Page 4 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	۵	My Workspace	Administratio	n Re	eports Help	Log Out		USER: Brett Fernandez (Bre	tt)
R	teminde	minders 1							
1	Dist	ribution Lists: 1	Book	narked	Items: 9	Allocat	ed Actions: 3	Allocated Journal Actions: 22	
	You have o	utstanding Journal Ad	tions for the fol	lowing 2	2 items:	2 Created	Summary		
1	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	
	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	
L	Incident	1478 Days Overdue.	26 Sep 2006	3445	Scott Esler	26 Sep 2006	Please take action o	n this journal	Ľ,

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	Add New Journal Entry									
DateStamp Journal Type		Description		Journal Username	Follow Up Allocated To	Item Actioned				
24 Apr 2017 10:31 Action taken		Please action the foll	owing task	Manager	Manager	False				
Journal Type:		Action taken		DateStamp:	24 Apr 2017 10:31	Reference:				
Description:		Please action t	e following task		•					
Follow Up By Date:				Item Actioned:	No Action	Follow Up Allocated Syste To:	sm 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	×
Journal ID: Not yet saved Has this Journal Item been Actioned?	
Yes	
Cancel Note: Actioning is immediate.	
, i i i i i i i i i i i i i i i i i i i	

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



Action Journal		×
Has th	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 the following task					
Follow Up By Date:	_		Itom Actioned:	Yes	Follow Up Allocated s To:	rstem Manager (Manager)
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 added successful	ly 🕤
What would you like to do?	
Add another document Return to the for	m

To view an attached document

- 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 Attached	Attached by	Size (KB)	Actions
500037	Complaint letter.docx	Complaint letter	18 Apr 2017 11:44	Manager	427	© 0

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

				Feedback	Review		
		You may make ar	ny changes to the form	n that are approp	riate. Then clic	k 'Submit' at the	bottom of the pag
Control Panel							
Version Control			There have been no e	dits.			> >>1
Last edited by:System	Manager (Manage	er) on 14 Sep 2016	11:57:11				
Related Item ID:	5						
24 Master	25						
Actions							
✓ Bookmark	Archive	Alert Me!	Change History	Dist. List	Print	Display as: PD	DF 🗸

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

		You may make a	ny changes to the form	Feedback	Review	k 'Submit' at the	bottom of the pag		
Control Panel									
Version Control									
I<< <		There have been no edits.							
Last 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: PD	F		

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 / Compla	int Review
	You may make any changes to the form that are appropriate	. Then click 'Submit' at the bottom of the page
Control Panel		
Version Control		
< <	There have been no edits.	> >>1
ast edited by:default	default) on 14 Sep 2016 15:47:07	
Actions	0	
		PLL 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

0	4	п	0	4	h =	-			Ente	red Feed	back				
0	-74	м	0	ч				Shows Fee	edback entered b	y you or anyone n in 'Distributed' to	eporting to you, or th you.	at have		¥ (
irag	a column	hander	here to	proup	by that	column .									
	Arch	hed (UH.	Π	1D	Date tritered in F	u-kMer	Stoup	Date Received 9	Closed Dr. 9	Type of Leedback 9	ste 🕴	Location 9	Summery *	Reporters Name
						•		*		v 7	•	•	•		
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×			None			10 Apr 2015		/	1 Apr 2015		Complaint	Watefield		Patient complain-	System Manager
8	*		Norw	11	1	29 Jun 2015		~	29 han 2015		Complaint	Sipc		а	System Menage
8	*		None	(W)		10 Apr 2015	_	U	9 Apr 2015		Suggestion	Reyston		Client suggeste	System Menage
~	*		None			10 Apr 2015			1 Apr 2015		Compliment	Reyston		Hasith Commis	System Manage
×			None		10	10 Apr 2015			1 Apr 2015		Compliment	Reyston		Grandma think	System Manage
8			None		9	10 Apr 2015			8 Apr 2015		Complaint	Reyston		Not measuring	System Nanage
			None			10 Apr 2015			9 Apr 2015		Complaint	Rowen		Client's friend L.,	System Manage
~			Nore	11	2	10 Apr 2015			7 Apr 2015		Compliment	Bowen		GP celled to tha	System Manager
	*		None		7	10 Apr 2015		Hastor	1 Apr 2015		Complaint	Bowen		Advecate compl	System Menage

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

📚 🔍 My Workspace * Ma	nagement * Administration * Reports * Help * Log Out	System Manager (Monage
°0. 4 4 8 4	Entered Feedback Shows Predback schered by you or ensyne reporting to you, or that have benefit to you.	* 🗆 🛛 🔓
Dray a columneeder base to group by 0	Selection Settings X	
Android i i i i iii iii iiii iiiii iiiiii iiiiiii iiii iiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiii	Solection Studies	Summer: Image: Summer and

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 '?	Submit' at the bottom of the pay
Control Panel		
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



	~	PIY	Work	space	6	Van	agen	nent *	Adminis	tration *	Reports *	Help *	Log Out			USER: No	ien Hasajer (Ha
0		1	П	ø	đ	21	-	Û		Shows Fer	Ente	ered Feed	back eporting to you, or the you.	sat have		٥	III 🕮 9
ing	a col	lumn hae	der h	tre to g	roup	by that	colun	nn									
		Archived	4	UN.	п	Ð	D	ale tritered i	n RiskMa	Group	Date Received 9	Closed Dr	Type of Leedback 9	Ste 🚦	Location •	Summary *	Reporters Name
							+						•	,		•	
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×	æ			None			10	Apr 2015		/	1 Apr 2015		Complaint	Watefield		Patient complet-	System Manage
8	æ			Norm	81		25	a her 2015			28 han 2015		Complaint	Sipc		а	System Menage
9	æ		6	one	(1)		10	0 Apr 2015			9 Apr 2015		Suggestion	Reyston		Client suggeste	System Menage
4				None			10	0 Apr 2015			1 Apr 2015		Compliment	Reyston		Hasith Commis	System Manage
v				None		10	16	0 Apr 2015			1 Apr 2015		Compliment	Reyston		Grandma think	System Manage
R				None		9	16	0 Apr 2015			8 Apr 2015		Complaint	Repetors		Not measuring	System Nenge
R				None		5	11	Apr 2015		1	9 Apr 2015		Complaint	Romen		Cient's friend L	System Manage
~				Norm	11	>	11	Apr 2015			2 Apr 2015		Compliment	Bowen		GP celled to tha	System Manage
				None		7	10	0 Apr 2015		Master	1 Apr 2015		Complaint	Bowen		Advecte compl	System Menage

- 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.

Review History			
Date		User \$	Notes
27 Mar 20	17 13:17	System Manager (Manager)	Created the incident item.
27 Mar 20	17 13:17	System Manager (Manager)	Incident item posted.
27 Mar 20	17 13:17	System Manager (Manager)	Most recently viewed.
27 Mar 20	17 13:17	Megan Kirkby (kirkbym)	User Alerted and Email SENT. Alert ID: 2
27 Mar 20	L7 13:17	Kim Edgar (edgark)	User Alerted and Email SENT. Alert ID: 18
27 Mar 20	17 13:17	Anne Wright (wrighta)	User Alerted and Email SENT. Alert ID: 20
27 Mar 20	L7 13:17	Anthony Vidler (vidlera)	User Alerted and Email SENT. Alert ID: 21
27 Mar 20	17 13:17	Peter Simmonds (simmonp)	User Alerted and Email SENT. Alert ID: 22
27 Mar 20	7 13-17	Line manager (Line manager)	User Alerted and Email NOT SENT. Alert ID: 45
27 Mar 20	17 13:26	System Manager (Manager)	Linked to ID 282
27 Mar 20	17 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 0
- 4. **New**: Search tool helps you find a record so that you don't necessarily need to know its ID number:

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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*