





SolvSafety User Guide – Manage Compliments and Suggestions

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Overview





Overarching policy	This user guide is implementing the Client Feedback and Complaints Management Policy.
System	Incident and Feedback Management System (SolvSafety).
Purpose	<p>This document contains:</p> <ul style="list-style-type: none">▪ A process overview identifying the SolvSafety forms and how they are used are used in the management process▪ High level information on the standard features of SolvSafety that may be used when managing Feedback in SolvSafety.▪ Information on common management activities within the system▪ Specific information about using TSA's custom Report and Manage forms to supplement the information in the system itself <p> This document does not:</p> <ul style="list-style-type: none">▪ Duplicate in detail information available in the <i>SolvSafety Help Centre</i>▪ Contain detailed information on every field of every custom form <p> This document must be read in conjunction with the related procedure.</p>
Who does this apply to?	Any person assigned to manage a Compliment or Suggestion using either the SolvSafety Portal or as a logged in System User.
Effective Date	18/04/2024

About the Incident and Feedback System



Purpose	The Incident and Feedback system is used to report and manage Incident and Feedback related to clients. Client in this context refers to any individual who is receiving TSA support/services (including participants and other beneficiaries) or engage in TSA Activities.
Registered Users	Only approved and registered users may manage Incident and Feedback within the System. To obtain a login please complete a SolvSafety Access Request that can be found in the 'Service Now' portal under the 'HR' / 'SolvSafety' section.
Modules	The system contains 4 modules – Client Incidents, Complaints, Compliments and Suggestions. Some users may not be able to perform activities in all four modules.

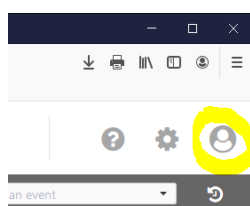
Logging in and out of SolvSafety

Logging in

URL	The login page is found here: SolvSafety - Login  Enter https://app.solv.com.au/#/app/login into a web browser search bar if the link above does not work.
Username	The Username will be the user's TSA email address.
Password	A password is required. A temporary password will be sent to new users as part of the registration process.  Passwords can be reset from the login page
Quick Access	 For quick access the URL of the login page may be bookmarked in a web browser as a favourite or use the SolvSafety icon in 'My Apps' on the Salvos Central home page.
Home page	Most users will see their <i>My Tasks Page</i> on login, but this may vary.
Getting help	 1. Initially go to the Continuous Improvement Toolkit containing an extensive range of resources to assist you. 2. Contact the Continuous Improvement Team for assistance. continousimprovementthq@salvationarmy.org.au .

Logging out / System Timeout

System timeout behaviour	 Users will remain logged in <u>even if the browser is closed and the PC is powered off</u> . The system will time out after approximately an hour.  Log out manually to reduce the risk of non-authorized users accessing the system.
How to logout	Select the profile icon at the top right of the page and select Logout.



Screenshot Diagram

Getting Help

SolvSafety Help Centre

The *SolvSafety Help Centre* contains lots of useful information about the system and its features.



The *SolvSafety Help Centre* only covers standard forms.

Information specific to TSA's custom forms is covered in this and related user guides.

To access the Help Centre

From within the system:

- Select the Question Mark (?) icon shown in the Top menu bar (1) in the screenshot below) and select *Help Centre* or just enter the search term in the box shown.

Without logging in:

- Enter <https://hsiapac.helpdocs.io/category/dnrczrpp34> in your browser search bar (Tip: bookmark this).

Support from within TSA

Raise a [HR Query](#) form that can be found in the ServiceNow icon on Salvos Central



This inbox receives large quantities of email. Emails should:

- Summarise the help required clearly in the Subject Line.
- Provide as much information as possible in the description including screenshots.
- Include SolvSafety IDs where relevant.

SolvSafety Ids

Reports in the System

Each Incident, Complaint, Suggestion and Compliment has a unique ID in SolvSafety. Identifiers have a specific format – see the table below where *N* is a number.



Identifiers without a '2' (i.e., TSA-IN-21) indicate records submitted in the System prior to August 2020

Report Type	Identifier Format	Example
Incident	TSA-IN2- <i>N</i>	TSA-IN2-21
Complaint	TSA-CX2- <i>N</i>	TSA-CX2-3045
Compliment	TSA-CV2- <i>N</i>	TSA-CV2-200
Suggestion	TSA-SG2- <i>N</i>	TSA-SG2-6

Overview of the SolvSafety Management Process

Triggers

Owners may become aware that they have Feedback to manage when they:

- Receive an Email from SolvSafety
- Are informed outside SolvSafety (e.g., phone call or email)
- See that a Complaint, Compliment or Suggestion has appeared in SolvSafety e.g., in a dashboard or task list.

Key Activities

Activity	Goal	Useful Sections
Review the Email	Determine the urgency, subject and need for immediate reassignment.	Review the Manage Email.
Review the Report	Understand the issue and identify any immediate next steps.	Review the Original Report.
Reassign	Assign the Feedback to the correct owner/location.	Reassign.
Manage	Record management activities and ensure that no steps are missed.	Common Management Activities Complete the Manage Feedback Forms
Close	Finalise the Feedback so that it is identified as closed during reporting.	The Close Form – Finalising the Report
Re-open	Add anything forgotten during the original management.	Re-open closed Feedback.

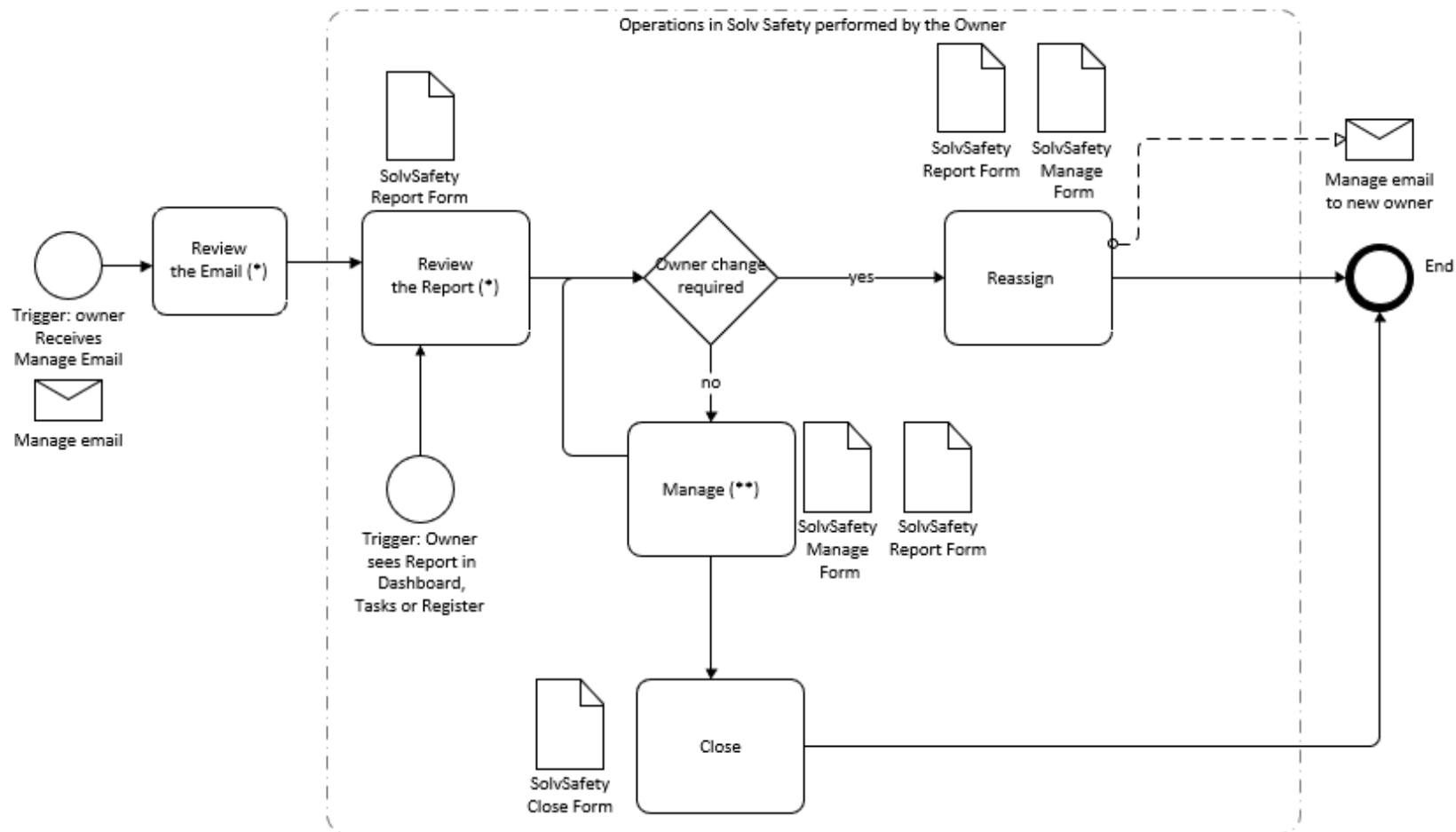
Forms used in Management

SolvSafety Forms

See the table and process diagram below to see how forms are used for management of Complaints, Compliments and Suggestions

Form	Completed by	Edited by	Standard Form or Specific to TSA?
Complaint Report Compliment Report Suggestion Report	Reporter	Owner	TSA Specific
Manage Complaint Manage Compliment Manage Suggestion	Owner	Owner	TSA Specific
Action	Not used	Not used	Standard
Close	Owner	Owner	Standard

Manage Process



(*) The owner may update the Report Form e.g. with additional information received since the report was made

(**) The time required to complete management actions may vary and may require revisiting SolvSafety on multiple occasions

Standard SolvSafety Pages and Functionality

In this section

- The *Home* Page
- The *Summary* Page
- Standard Form Features and Behaviour

The Home Page Dashboard

Which Home page will I see?

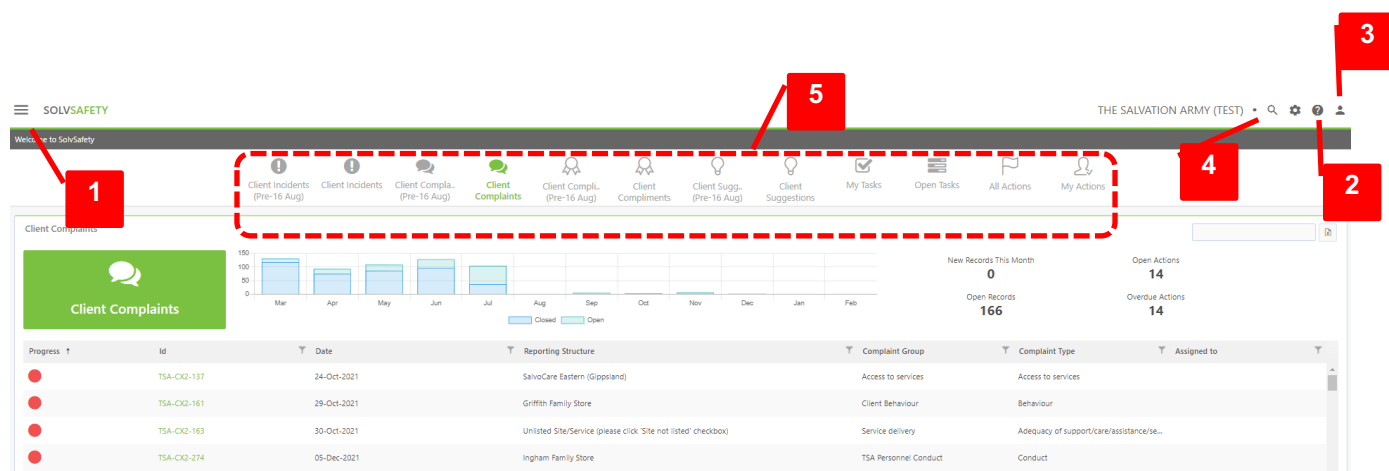


The user's *Home* Page will be displayed automatically after logging in to the system (unless the system was accessed via a link in an email. – in which case a different page or form may be displayed).

Different users with access to other modules (e.g., WHS Incident, WHS Hazard or Near Misses, etc) may be set up with a slightly different home page, displaying icons for these modules on the Dashboard as well (region 5 shown below).

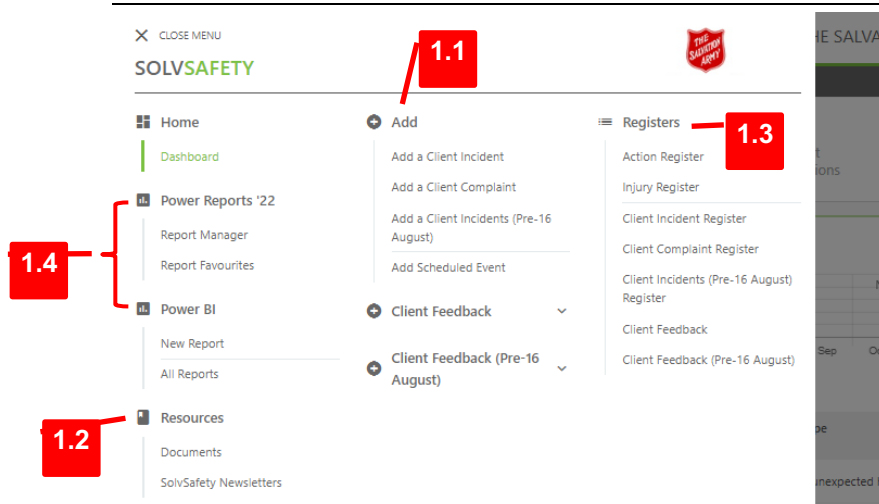
More information

See the *SolvSafety Help Centre*.



(1) Top Menu

This will display the Top Menu to provide access to various key features such as Power Reports, Resources, and Registers and enable the reporting of Incidents, Complaints, Compliments and Suggestions.



1.1 Add Button

Report client related Incidents, Complaints, Compliments and Suggestions from here.



See:

- SolvSafety User Guide – Report an Incident
- SolvSafety User Guide – Report a Complaint
- SolvSafety User Guide – Report a Compliment
- SolvSafety User Guide – Report a Suggestion

1.2 Resources Button

Gives access to any resources uploaded by TSA.

1.3 Registers

Provides a resource to view all open and closed Complaints with basic key information.

1.4 Power Reports/BI

Provides the ability to view and create reports utilising data in SolvSafety.

(2) Help Icon



This icon provides access to the *SolvSafety Help Centre*.



SolvSafety built in help does not cover TSA specific Report and Management forms.

(3) Profile Icon



This icon gives access to the logout button.

(4) Search Bar/Recently Viewed

Overview

From the Search Bar users can:

- Search using an ID
- View the last ten records accessed



Typing just the number part of the ID will return all incidents/feedback containing that number so care must be taken to select the right one!



IDs will only be returned if the search results where the user has appropriate permissions for both the module and the Sites/Service

(5) Home Page Dashboard Icons



Different users will have access to different icons.

Icon	Displays	Visible to	Notes
My Tasks	Lists open Incidents and Feedback together with the due dates when the user <ul style="list-style-type: none"> Is the assigned owner Has permission to view that site / Service	All users.	Searchable (see (5) in the screenshot above).
Open Tasks	Displays all Incidents and Feedback at sites/services the user can see, even those not assigned to the user.	Managers who need to monitor incidents and feedback <u>managed by others</u> across multiple locations.	
Alerts	Displays a list of Alerts (i.e., where action is required, overdue).	As configured.	
Incidents / Complaints / Suggestions / Compliments (dashboard)	Displays either the Incidents, Complaints, Suggestions or Compliments dashboard for Sites/Services that the user has permission to view.	Visible to managers who need to monitor incidents and feedback <u>managed by others</u> across multiple locations.	
Feedback and complaints (dashboard)	Displays the Incidents dashboard for Sites/Services that the user has permission to view.	Visible to managers who need to monitor incidents and feedback <u>managed by others</u> across multiple locations.	

The Summary Page

Overview	This page is the “home page” for all aspects of management of a specific Incident, Complaint, Compliment or Suggestion
Getting to the page	Users see this page when they click on a link to a specific Incident, Complaint, Compliment or Suggestion within SolvSafety. This page is usually redisplayed when the user selects <i>Save and Finish</i> or <i>Save as Draft</i> on a Form.
Additional help on this page	See the <i>SolvSafety Help Centre</i> .

Progress Buttons

Progress Buttons	On the <i>Summary Page</i> , a vertical column of buttons indicates progress through the forms and activities for reporting and managing a Complaint. As activities are completed, the buttons change color: <ul style="list-style-type: none"> Green buttons indicate that a record has been closed Red requires action Grey buttons indicate that a form is not complete / enabled
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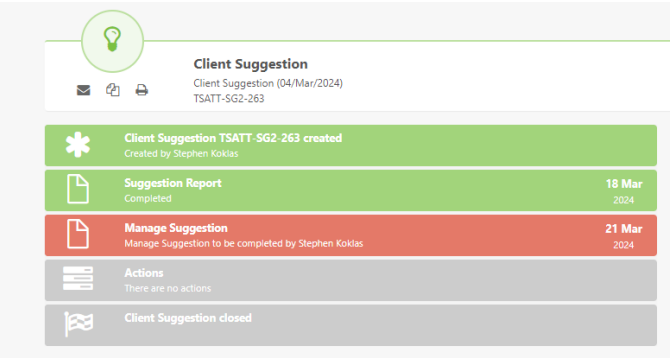
The *Summary Page* is a standard page in SolvSafety however the forms shown in the *Progress Buttons* are specific to TSA and so are not shown as named forms in the *SolvSafety Help Centre*.

For more on the forms used in management see the section on the process below.

Example

In the screenshot below

- The first (green) *Progress Button* shows the SolvSafety ID
- The second (green) *Progress Button* shows that the Report form is complete
- The third (red) *Progress Button* shows that the Suggestion Report requires action on the Manage form
- The remaining (grey) *Progress Buttons* have not been actioned or are partially complete



Standard Form Features and Behaviour

Symbols, buttons etc

	A red asterisk indicates a field that must be completed before the form can be saved
	Hovering the cursor over the question mark will display the help associated with a field
	Clicking on the down arrow shows a drop-down list – this may cause additional hidden fields to be displayed
<input type="checkbox"/> Site not listed	Clicking on a box will tick it – this may cause additional hidden fields to be displayed. Click again to untick (remember to clear any data in fields that will be hidden)

Record buttons

What is a Record?

A record consists of one or more fields that may be repeated if required. For example, as complaints can involve multiple people, the form allows the user to add multiple people's records.



The green button will convert the current contents of the data entry field(s) for the relevant record into an entry in a list format (see screenshot below), clearing the data entry field(s) for a new entry to be created.

The clear button will clear whatever is currently in those data entry field(s).

Edit / Delete

Edit Delete

What happens data in the data entry fields of a record when the form is saved?



Edit – copies the record back into the data entry fields for further editing.
Delete – discards the record.



When editing a data field, any data currently in the data entry fields will be overwritten! It is a good idea to select *Add Another Record* to clear the fields before selecting Edit

When the form is saved any records in the record list will be saved together with any data still in the data entry field.
For example, If there are four listed records, and the data entry fields contain entered data for a fifth record, even if the user does not select *Add Another Record*, the data will be saved on successful *Save as Draft* or *Save and Finish*.

Save buttons

Save and Finish

Save as Draft



Mandatory fields must contain data when *Save and Finish* is selected, or an error will be reported.



Selecting the *Save as Draft* button

- A draft of the form is saved without performing any validation
- The form is not finalised e.g. if it is a report no email is sent to the owner

Hidden fields

Hidden fields and panes

The choices made on the form (e.g., choosing from a list or ticking a checkbox) may result in some data entry fields being displayed or hidden. Hiding fields removes the need for the user to decide whether a field is relevant or not.

Importance of clearing fields before hiding them

Hiding a field does not delete its data



Data in hidden fields may be saved to the database in error.

Clearing all fields containing data before hiding them will ensure that reports generated from SolvSafety are accurate.

Any uncleared hidden fields data may prevent the complaint record from being fully closed off in the system.

How to clear a field

Date fields

There is a *Clear* button on the date selector

Records

Use the *Delete* button for entries in the list.

Use the *Clear* button for the current record entry

Dropdown lists

At the top of the list there is always an option labelled *Select*. Choose this.

Checkboxes

Click to untick

Text fields

Manually delete the text – select the text and hit the backspace key

Validation of fields

Email addresses and phone numbers	There is no validation of email addresses or of phone numbers.
Date Validation	There is limited date validation. Users must check that entered dates are correct.

Common Management Activities

Detailed instructions are not provided in this section where the information is available in the *SolvSafety Help Centre*.

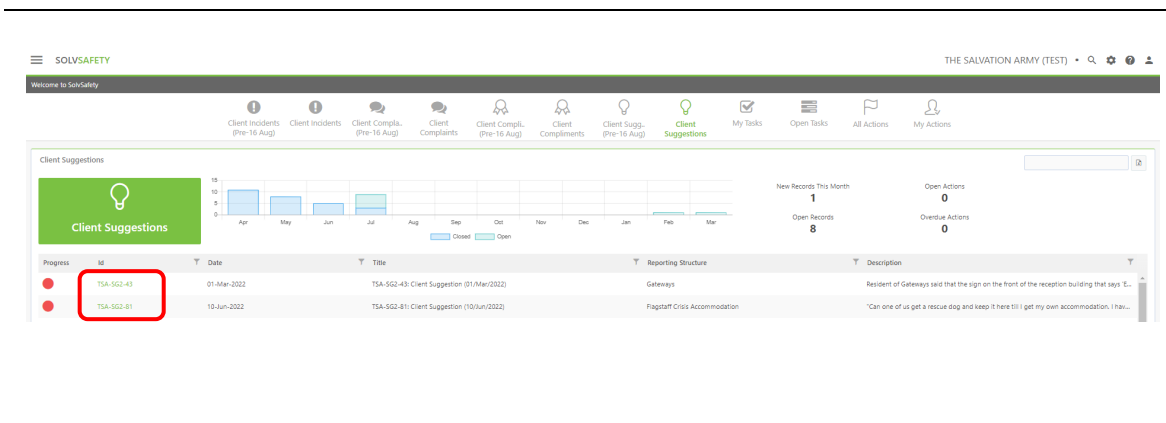
In this section	<ul style="list-style-type: none">▪ Open a Form to edit it▪ Open a Completed Feedback Form – view only▪ Manage Attachments▪ Manage Hyperlinks▪ Add a Note from within SolvSafety▪ Send a Feedback related Email from within SolvSafety▪ Add a Note using Outlook▪ Re-open closed Feedback
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Open a Form to Edit it

Form requiring initial action (red button)	To Open, click on the <i>COMPLETE FORM</i> link in the notification email.
Completed Forms (green buttons)	To re-open a completed form in edit mode from the <i>Summary Page</i> : <ul style="list-style-type: none">▪ Select <i>Add Information -> Edit</i> <form name> Also see: Re-open closed Feedback.
Partially Complete Forms (Red or grey button)	Clicking the button will open the form in Edit mode.

Open a Completed Feedback Report Form

Display the Client Suggestion / Compliment Home Page	To Open, click on the <i>Client Suggestion or Compliment</i> button on the Home page.
From the Home Page	Select and click on the form ID



Manage Attachments



Deleting any attachment that exists on the Report Form will delete it from both forms.

Important Behaviour note:



The system treats Attachments and Hyperlinks differently:

Dependency between Report and Manage Forms

- Attachments added to the Complaint/Compliment/Suggestion Report Form will be shown on both forms
- Attachments added to the Manage Complaint/Compliment/Suggestion form will only be shown on the Manage form
- Deleting any attachment that exists on the Report Form will remove it from both forms

What are attachments

An attachment can be any file e.g., Microsoft Office files like Word or Excel, Photos or PDFs.

Actions

During Management an owner may add, edit or delete attachments as required.

Adding attachments

Files can be added by:

- Drag and drop
- Browsing for the file and selecting it

As attachments are added they are listed in the Attachments pane of the form (see screenshot below).

File naming

Make the file names as meaningful as possible to save time later.

Viewing attachments

Click on the name of an attachment in the list to view it.

Removing attachments

Files can be removed using the delete button (see screenshot below)



Deleting an attachment shown on the Complaint/Compliment/Suggestion Report Form will delete it from both forms.

If the file was not attached in error, consider renaming the file to have a name commencing DO NOT USE and note the reason in the Actions section.

Example

Attachments

Upload any documents that are relevant to this complaint

Select file or drag and drop...Choose file

Title	File Name	File Type	Size	
1. Acknowledgement of request	1. Acknowledgement of request.docx	application/msword	34.94 KB	Delete
20210713 Reported (1)	20210713 Reported (1).docx	application/msword	13.49 KB	Delete

Add a Note from within SolvSafety

Overview

The standard Notes feature in SolvSafety supports users to add a brief note to a Feedback Report.

When to use

This feature should only be used when there is no prominent section on the Manage Form to record the information.

Disadvantages



It may not be evident to a new Owner that a Feedback Report has notes attached, so information added in the notes section may be missed if ownership is transferred.

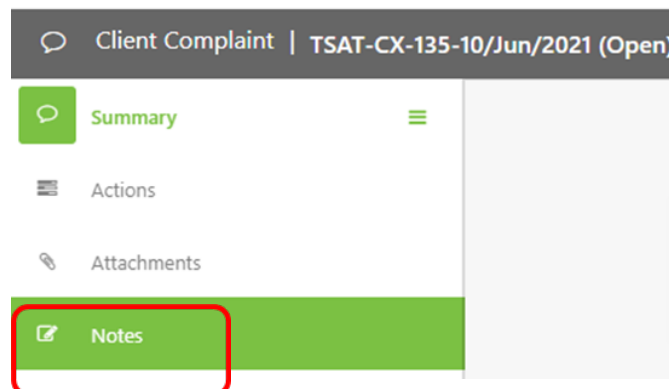


To alert others to the existence of Notes the user can:

- Pin a note to the *Summary Page* e.g. This Complaint has information in the Notes section
- Update an appropriate section of the Manage Form

Where are Notes located

On the *Summary Page* go to the Notes Tab.



How are Notes added

For full instructions go to the *SolvSafety Help Centre*. Click the ? icon at the top right of a SolvSafety page and search for *Notes* in the Help Centre

Emailing a Note

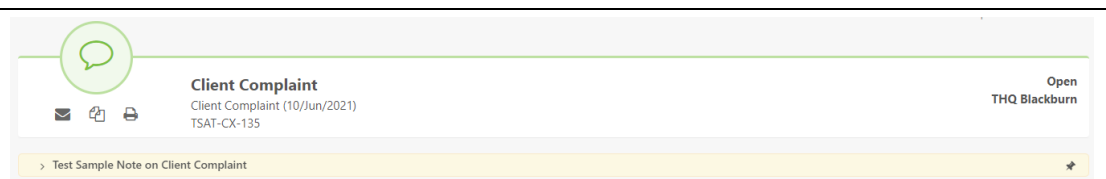
Notes may also be added to a Feedback record by email (see: Add a Note using Outlook)

Pinning a Note


When a Note is marked as 'Pinned', it is displayed at the top of the *Summary Page*, so it is highlighted in a yellow box to any User that views the page.

It can be used for any Note but is typically used to alert a User to read critical information before they continue managing that record.




Example



Send a Feedback related Email from within SolvSafety

Overview	Owners can send an email related to the Feedback from within SolvSafety to one or more recipients.
Is a copy of the email kept?	Yes. Emails can be viewed by anyone who can access the <i>Summary Page</i> of the Complaint, Compliment or Suggestion.
How will the recipient know who sent the email?	By default, SolvSafety inserts a signature showing that the email came from TSA. A simple signature can be set up in the system for each user (TSA Outlook signatures cannot be used as they are too complex).
How do I get my signature set up?	Where a signature has not been set up / is not set up correctly please contact continuousimprovementthy@salvationarmy.org.au  Signatures may also be manually typed into the text of the email.
To learn more	Go to the <i>SolvSafety Help Centre</i> and search for <i>emails</i> .

Add a Note using Outlook

Overview	Anyone who knows the ID of an Incident, Complaint, Compliment or Suggestion can attach a copy of the email and its attachments to a SolvSafety report without logging into the system.
Sensitive Emails	 For sensitive matters, it may be preferable not to use the notes function to attach notes to the Complaint, Compliment or Suggestion but instead record in the system that the emails exist.
Ensuring future replies are not automatically added	 When an email has multiple recipients and someone selects Reply, the responses will also be attached to the Complaint, Compliment or Suggestion even if the email is irrelevant to the Feedback. To avoid this: <ul style="list-style-type: none">▪ Forward a copy of the email rather than sending the original <u>or</u>▪ Put SolvSafety as a Bcc recipient
How do I do this?	For full instructions go to the <i>SolvSafety Help Centre</i> . Click the ? icon at the top right of a SolvSafety page and search for <i>notes</i> in the Help Centre
The email address to use	 August 2020: TSA uses a different version of SolvSafety for WHS incidents – be sure to use the right SolvSafety email address (notes@solv.com.au) when sending outlook emails to the system.
Troubleshooting	If an email sent to the system is not added to the record the first step is to check the Sent folder in Outlook: <ul style="list-style-type: none">• Was the correct ID used? If the wrong ID is used the email will be attached to the wrong Feedback record.• Did the subject line contain two sets of round brackets? This will cause the email to be rejected by SolvSafety. Only the ID should be in round brackets. Resend the email replacing other brackets with [] or { }• Was the correct SolvSafety email address (notes@solv.com.au) used?

Re-open closed Feedback

Can a closed Feedback record be opened?

Yes, but only a small group of users can do this. If you wish to re-open a closed complaint, contact the Quality Team/Lead in your Mission/Stream or the CI team.

This is done via the *Summary Page* for the Feedback record.

Select the *re-open* option in the *Add Information* pane. See the *SolvSafety Help Centre* for more information.

Once the Feedback record is re-opened the associated Manage and Report forms may be edited.

Known Issue



When a Report is re-opened the option to *Save as Draft* is no longer available. August 2020. This has been raised with Solv, but it is unclear whether the behaviour will change.

Workaround

Make any changes required and save immediately.

Process Activities

In this section

- Review the Manage Email
- Review the Original Report
- Reassign
- Complete the Manage Feedback Forms
- Finalise the Report

Review the Manage Email

Goal

To determine whether the management task is:

- urgent
- intended for another owner
- blocked – the chosen Site/Service is incorrect
- correct suggestion/compliment categorisation is correct

When does this activity occur?

Once a Report is created in SolvSafety and email is automatically sent to the assigned owner – See an example of the from/subject line below

The Manage Email

In outlook the email will look like the screenshot below:

[BULK MAIL] Manage Compliment Required in SolvSafety

Email Contents	The email contains: <ul style="list-style-type: none">▪ Reference: The SolvSafety ID & recorded receive date▪ The SolvSafety ID (see section above for formats)▪ Scheduled Date: Manage report completion date▪ The Business Unit (Site/Service)▪ The name and email of the reporter (as entered in the system)▪ A <i>COMPLETE FORM</i> link to the system
Determine urgency	It may be clear from the combination of report type and description whether an immediate response is required. If it is not clear, then the original report must be examined.
Check the Site/Service is as expected	If the Site/Service shown in the Business Unit is not correct, it may not be possible to view the Compliment or Suggestion. See troubleshooting below.

Troubleshooting

Unexpected Site/Service

Where the Site/Service is not one expected by the assigned owner, then either the reporter has selected:

- The wrong owner or
- The wrong Site/Service

Contact the reporter if possible, for clarification if it is not obvious what the mistake is.



If the wrong Site/Service has been selected it will not be possible to view the record until the information has been corrected

Owner Correct but Site Incorrect

There are 3 options:

1. If you have access, make the necessary correction.
2. If you do not have access raise an [HR Query](#) ticket using Service Now on Salvos Central.
3. If you do not have access forward the email to the Continuous Improvement Team (continuousimprovementthq@salvationarmy.org.au) including "Incorrect Site/Service" in the subject line of the email.



Where an urgent response is required, then the reporter must be contacted directly for more information about the Feedback report.

Site Correct but Owner Incorrect

If the intended owner is at the Site/Service shown:

1. Forward the email to the intended owner with an explanatory note – so that they know the Complaint, Compliment or Suggestion exists.
2. The incorrect owner must then go into SolvSafety and change ownership to the correct owner. If this can't be done contact the CI team for assistance.

Site and Owner incorrect

If the intended owner is not at the Site/Service, then:

Forward the email to the Continuous Improvement Team (continuousimprovementthq@salvationarmy.org.au) including "Incorrect Site/Service and Incorrect Owner" in the subject line

Review the Original Report

Option 1: Access by search (preferred)

	Action	Outcome
1	If not already logged in: <ul style="list-style-type: none">▪ Login to SolvSafety following (see instructions in an earlier section)	The user's <i>Home Page</i> will be displayed.
2	Enter the ID from the email into the Top Menu (event) search.	One or more results will be displayed.
3	Select the search result that exactly matches the ID of the Feedback record.	The <i>Summary Page</i> for the Feedback record will be displayed.

Option 2: Access by email link

	Action	Outcome
1	Select the Email Link.	There are 3 possible outcomes: <ul style="list-style-type: none"> If you are not logged in, the SolvSafety Login Screen is displayed (Go to: Step 1a) <i>The Manage Form</i> is displayed (Go to: Step 2) If you cannot access the details of the Incident (error message displays “you don’t have access”), then the reporter either incorrectly selected the wrong site/service or owner. For more information see the troubleshooting section above.

If the login screen is displayed:

1a	Log in to the system.	The appropriate Manage form is displayed
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Once the Manage form is displayed:

2	Select Cancel.	The user’s home page dashboard will be displayed.
3	Enter the ID from the email into the Top Menu (event) search.	One or more results will be displayed.
4	Select the search result that exactly matches the ID.	The <i>Summary Page</i> for the Feedback record will be displayed.
5	Open the Report Form	See below.

Open the Report Form – View Only

Goals

- Understand the nature of the Feedback
- Add any relevant additional information e.g., supplied by the reporter or extracted from another system
- Decide the next steps required

Starting Page

Summary Page for the Feedback record.

	Action	Notes
1	Open the Compliment/Suggestion Report form by clicking on the Report on the <i>Summary Page</i> .	The form will be displayed in read only review
2	Review the form to determine whether to reassign to another Owner, change the Site/Service or change the Group or Type	
3	Close the read only view of the report	<i>Summary Page</i> will be re-displayed

Report Review Outcome	Next Action
Reassignment Required	1. Reassign (See: Reassignment to Another Owner below) No further action required
Reassignment not required – additional information available	1. Open the Complaint/Compliment/Suggestion Report form for edit 2. Update the Data 3. Select <i>Save and Finish</i> 4. Go to: Complete the Manage Feedback forms
No action on Report Form required	Go to: Complete the Manage Feedback forms

Reassign

Goal	Ensure that the correct owner can view and manage the Feedback in a timely manner.
Forms	Reassignment is performed on the <u>Report</u> form.
Documenting the reassignment	Where possible record the details of the reassignment should be documented on the Manage form as the system records on the <i>Summary Page</i> that a change has been made but not the details of the change.

Reassignment to Another Owner

Document the planned reassignment

Compliments and Suggestions:

Step	Action	Outcome / Notes
1	Open the <u>Manage</u> form for Edit	The form will be displayed in read only review
2	In the <i>Actions</i> section note the date and reason for the reassignment	
3	Select <i>Save as Draft</i>	The manage form will be saved The <i>Summary Page</i> will be redisplayed.

Reassign

4	Open the <u>Report</u> Form for Edit	
5	If known: Record any additional information on the form that is missing	In some cases, additional information may have been emailed to the Owner or be available from other sources
6	If required: Modify the <i>Site/Service</i> field	See: SolvSafety User Guide – Report a Compliment SolvSafety User Guide – Report a Suggestion
7	Modify the Owner details	
8	Select <i>Save and Finish</i>	Note that if a user modifies the <i>Site/Service</i> to one that they do not have visibility of the user will no longer be able to see the Feedback Record. No further actions are required.


Reassignment to another Site/Service

Document the planned reassignment

Compliments and Suggestions:

Step	Action	Outcome / Notes
1	Open the <u>Manage</u> form for Edit	The form will be displayed in read only review
2	In the <i>Actions</i> section (section 3) note the date and reason for the reassignment	
3	Select <i>Save as Draft</i>	The manage form will be saved The <i>Summary Page</i> will be redisplayed.

Perform the reassignment

4	Open the <u>Report</u> Form for Edit	
5	If known: Record any additional information on the form that is missing	In some cases, additional information may have been emailed to the current Owner or be available from other sources
6	Modify the <i>Site/Service</i> field	See: SolvSafety User Guide – Report a Compliment SolvSafety User Guide – Report a Suggestion  When selecting a Site/Service the full path must be correct. In some cases, the last part of the path may exist for more than one Site/Service.
7	If required: <ul style="list-style-type: none">▪ Modify the Owner details	See: SolvSafety User Guide – Report a Compliment SolvSafety User Guide – Report a Suggestion
8	Select <i>Save and Finish</i>	Note that if a user modifies the Site/Service to one that they do not have visibility of they will no longer be able to see the Feedback record. No further actions are required.

Complete the Manage Feedback Forms

Only key points are noted as the forms are generally self-explanatory.

Related Procedures

The related procedure should be consulted when completing this form

Timeframes

See the procedure for expected timescales for management of feedback.

Attachments

Adding and Deleting



See Common Management Activities section above for important information on system behaviour when adding and deleting

Manage Suggestion / Compliment Form.

Also see: Suggestions / Compliment Procedure.

Close the Report

Suggestion Closure

At the end of the Manage Suggestion form select the relevant closure status, then click on 'Save and Finish'.

3. Closure

Closure Status *

Select

Select

Suggestion to be implemented

On hold

Not to proceed

Not a suggestion

Duplicate

Save as Draft

Save and Finish

Cancel

Compliment Closure

At the end of the Manage Compliment form select the relevant closure status, then click on 'Save and Finish'.

5. Closure

Closure Status *

Select

Select

Closed

Closed Duplicate

Save as Draft

Save and Finish

Cancel

Manage Form Completion

The Manage form has been completed (i.e., the *Progress Button* for the form is coloured green on the *Summary Page*).

Summary

Actions

Attachments

Notes

Exports

Client Suggestion

Client Suggestion (04/Mar/2024)

TSATT-SG2-263

Client Suggestion TSATT-SG2-263 created

Created by Stephen Kokias

Suggestion Report

Completed

18 Mar 2024

Manage Suggestion

Completed

18 Mar 2024

Actions

There are no actions

Client Suggestion closed

Closed by Stephen Kokias

18 Mar 2024

Add Information

Select one

Alerts

Update Note

Note *

Title

Add Clear

The Complete Page – if a form is opened from an email link

What is the complete Page

The *Complete Page* is displayed to Users once a form has been completed.

What can I do from this page

From the Print Pane:

- Select the Print button to View, Save or Print a copy of the submitted report (which contains the Complaint ID)

From the Email Pane


- Select **More...** to add the subject and a message before emailing a read-only copy to yourself or another person (one email address per email!)




Remember to include your name and contact details in the email so that the recipient knows who sent it (this information can't be included automatically)

What happens next?

When you select *Finish* you will be returned to the Summary page.


TSAT-SG-30 |  Manage Suggestion has been saved successfully

 Print


To print this document or export to PDF, click the print button.

Print

Export to PDF


 Email

To *



More...

Email

 Finish

If you are finished with this document, click the finish button.




Finish

Related Documents and References

Related Policy Documents	Client Feedback and Complaint Management Policy
Related Legislation	N/A
Related Accreditation	N/A
Other Relevant Documents /Resources	Client Feedback and Complaint Management Procedure Complaint Categorisation Table: Salvos Stores Employment Plus Social Mission Salvos Funerals Community Engagement Salvation Army Housing Corps SAID SolvSafety User Guide – Report a Suggestion SolvSafety User Guide – Report a Compliment

Definitions

Definitions are located in the Glossary of Terms and Definitions

Term	Definition
	This symbol indicates either a special note or an attachment.
	This symbol highlights a matter that may have serious personal or organisational impact if not considered or acted upon.
	When you see this symbol there is a checklist to complete.
Client	Client in the context of the Incident and Feedback System refers to any individual who is receiving TSA support/services (including participants and other beneficiaries) or engage in TSA Activities.
Dashboard	SolvSafety page showing a list of Incident reports or a list of Feedback reports visible to the system user together with graphs.
Feedback	Feedback can be a Compliment, or Suggestion. Feedback may be received from individuals or from organisations and provides an opportunity for improvement of services, products or processes.
Feedback record	Compliment or Suggestion record in the System. The record consists of all the forms and accompanying notes.
Feedback and Complaints Management System	A TSA IT system designed to record, manage and notify on client complaints and other feedback.

Incident	An unplanned, undesired event that adversely affects an individual, an organisation or a task. An incident requires an organisational response in a timeframe that is typically determined by its severity.
Suggestion / Compliment ID	Every report in the system has a unique identifier with the format TSA-SG2-X for a Suggestion and TSA-CV2-X for a Compliment where X is a number e.g., TSA-SG2-1.
Logged In User	Someone who has already logged in to SolvSafety using their username and password.
My Tasks Page	A page showing all forms assigned to an owner that have commenced activity. It may not show tasks that have been assigned but not yet commenced.
Portal	A webpage that allows users to create Incident and Feedback reports without logging in.
Portal User	Someone who registers an incident without logging in to SolvSafety.
Progress Buttons	Coloured Buttons on the <i>Summary Page</i> for a Feedback report. The colours and text indicate the status of the different forms associated with management of the Feedback.
Recorder	The person who completed the original Feedback Report form.
Register	A searchable and sortable list of Incidents or Feedback within SolvSafety.
Summary Page	This is the home page for a Compliment or Suggestion. From this page all the forms associated with the feedback report can be accessed and managed.
The Salvation Army (TSA)	The Salvation Army in Australia inclusive of all Mission expressions and Mission Enablers.

Document Control Information

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Document Implementer	Head of Quality and Safeguarding	
Approval Authority	Chief Secretary	
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Document History	Date	Summary of Changes
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