SolvSafety User Guide – Report an Incident

Contents

Overview

Overarching policy	This user guide is implementing the Incident Management Policy
System	Incident Management System (SolvSafety).
Purpose	This document provides information on how to report a client incident in SolvSafety.
	This User Guide does not tell you about every field on the form but only about those fields where additional information may be useful. It should be read in conjunction with the related documents.
Who does this apply to?	Anyone who wants to report an Incident using either the SolvSafety Portal or as a logged in System User.
Effective date	12/10/2023

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
Select	Clicking on the down arrow shows a drop-down list – this may cause additional hidden fields to be displayed
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 you have additional data e.g. as incidents can involve multiple people you can add multiple people records.
Add another record / Clear	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 – copies the record back into the data entry fields Delete – discards the record
	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 NOTE: You may need to ask the CI Team to re-open if already closed.
What happens when the form is saved?	When the form is saved any record in the list will be saved to the database together with any data in the data entry fields. So, if you have 4 records in the list and have entered the data for a fifth record, but not selected *Add Another Record* yet, there will be 5 records saved to the database.

Save buttons

Save and Finish	Mandatory fields must be filled in when you select *Save and Finish* or an error will be reported.
Save as Draft	Provided that a form meets minimum criteria a logged in user can select 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 you make on certain forms (e.g. choosing from a list or ticking a checkbox) may reveal hidden additional data entry fields. This is to ensure that the user only needs to complete relevant sections of a form.

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 S*elect*. 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, so it is up to you to check that the date you have entered makes sense when compared with other dates on the same report.

Opening the Report Incident Form

Portal Users with access to Salvos Central

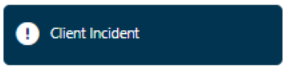
Go to the Portal

Access the SolvSafety - Portal located on Salvos Central under 'My Apps'.

For Residential Aged Care do not use SolvSafety. Use iCare instead.

To open the form

Click on the Client Incident Icon.



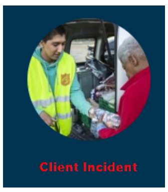
Portal Users without access to Salvos Central (e.g., Volunteers)

Go to the Portal

Access *Salvation Army Incident and Feedback Reporting* from the 'VolHQ' icon on 'MySalvos'

To open the form

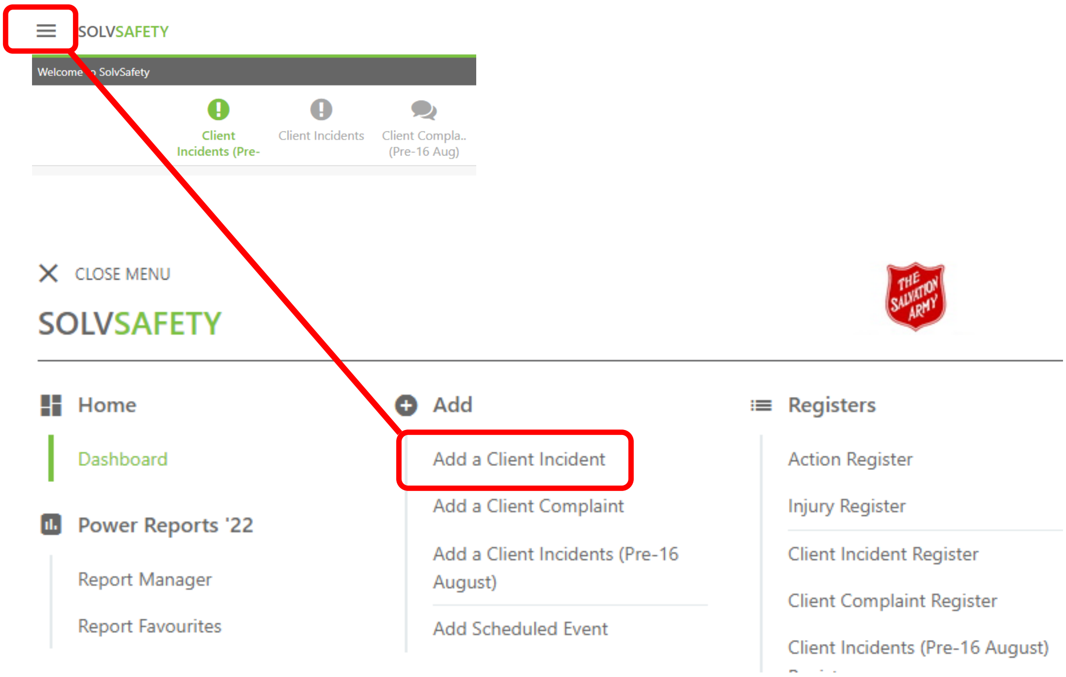
Click on the Client Incident icon.



System Users

Logging in

URL	Solv - Login (if the link does not work then paste *https://app.solv.com.au/#/app/login* into your preferred web browser search bar)
Username	Your TSA email address
Password	Will have been emailed to you but can be reset from the login page
Your Home Page	Most users will see their My Tasks page
	If you cannot log in, please submit a *HR Query Form,* found via Service Now on Salvos Central. In the meantime, you can still make a report via the SolvSafety portal on Salvos Central
To open the form	On the top Menu bar select the *dropdown* Button and then *Add a Client Incident*



Completing the Form

	Scroll up and down the form to identify which sections you believe you will need to fill in and which fields are mandatory
	This Work Instruction does not tell you about every field on the form but only about those fields where additional information may be useful

Section 1. Incident Details

		This section contains mandatory and hidden fields.
Dates and times	You can record both the date of the Incident and the date on which TSA was notified (if it was later).	

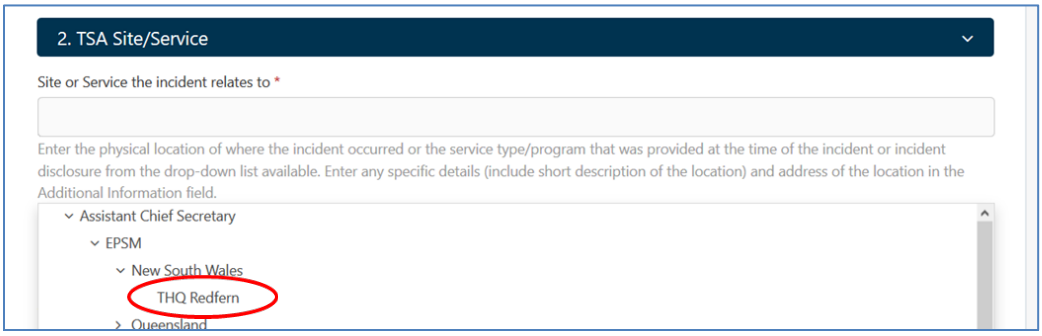
Incident Categorisation

Mission/Stream		*Mission/Stream* is a Mandatory Field. It identifies the specific Mission responsible. It's critical that you know and select the correct Mission you sit under so that the appropriate 'Incident Group' for your specific Mission is displayed in the next field.
Incident Group and Type		*Incident Group* is a Mandatory Field. When the *Incident Group* field is populated with a listed option, an additional mandatory field *Incident Type* will be displayed. Selecting the *Incident Group* determines which *Incident Types* you will be able to select from. Selecting the *Incident Type* determines the *Incident Category.*
		A link to the *Incident Categorisation Table* specific to each mission, that explains more about the Categorisation of incidents within TSA, is provided in this section of the form on SolvSafety. The categorisation tables are stored on the *Policy Hub.*
Incident Category		Category 1 is the most serious and the system will generally automatically notify all management up to the Chief Secretary, followed by category 2 and Category 3 is the least serious and only immediate line managers are notified. The notifications required will vary based on the Group, Type and Category.
What if I'm still not sure?	Ideally contact your manager or team leader for advice, otherwise refer to the definitions section of the mission specific categorisation table for guidance. NOTE: if wrongly categorised, senior leaders may be unnecessarily notified.	
What if my choice isn't the best one?	The Incident Owner will always review the Group and Type. They may change your original selection.	
WHS auto-notification	The system will send auto-notification to WHS for selected types of incidents on Save and Finish the Incident Report.	
Alleged or actual abuse or harm to a child	Selecting 'Yes' will trigger off email notifications to Safeguarding Team on Save and Finish the Incident Report.	

Section 2. TSA Site/Service

This is used to record where an incident occurred or the team for the program location that is resonsible for the incident.	
	Site/Service is a Mandatory Field

Selection by drill down	To select a site and service you must work your way down the drop down structure identified with the '>' symbol until there are no more drop down options as per the image below, where 'THQ Redfern' is the only option that can be selected.



Comment

Selection by search	You can start typing the name of the Site/Service and will see options matching your search string

Be careful when selecting a Site/Service as the full path must be correct e.g. Searching for Leongatha Corps will turn up 5 quite different answers depending on the mission involved

1. Division>Victoria>Corps>Leongatha Corps
2. Doorways>Victoria>Leongatha Corps
3. Family & Domestic Violence>Victoria>Leongatha Corps

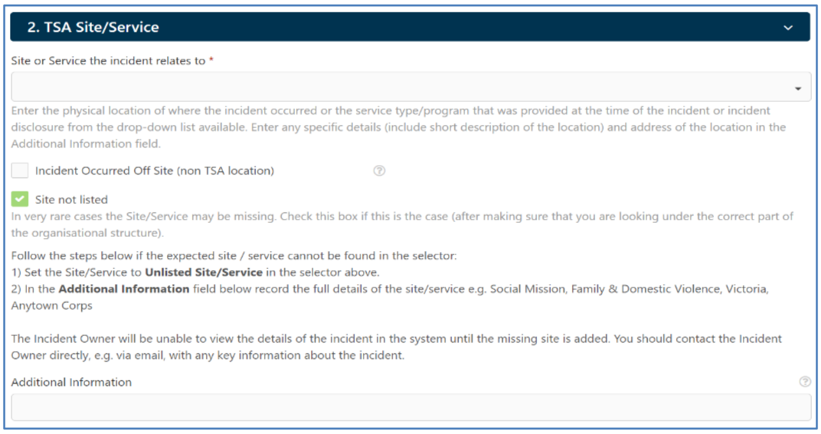
Etc.

There are a lot of entries so the search can be a little slow so be patient. If there is no match you will be shown an empty box.

Tick the *Does Incident relate to an offsite Location?* if this condition applies.

What if the Site/Service is not listed?

1. Check the spelling you are using e.g. Surrey Hills (Victoria) or Surry Hills (NSW)
2. Ask your manager or someone else in your team for advice.
3. After the above have been tried unsuccessfully, tick the *Site Not Listed* checkbox and follow the instructions

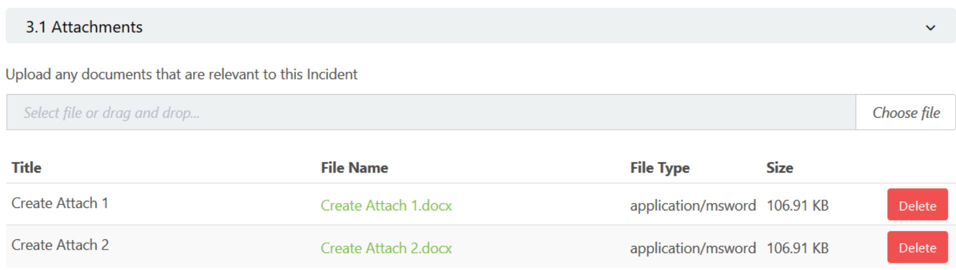


Section 3. Description of the Incident or Allegation

This section includes Mandatory fields and optional fields.

Attachments

What are attachments	An attachment can be any kind of file e.g., Microsoft Office files like Word or Excel, Photos, PDFs, etc. NOTE: There is a 12MB limit to the file size of attachments. The uploading of reports of workplace investigations and images or video footage of any client abusive nature are not permitted.
	You may add none, one or many attachments related to the Incident.
Adding attachments	You can add files to the record using either drag and drop or by browsing for the file on your device. 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 help the owner identify their purpose.
Viewing attachments	You can view any attachment by clicking on its name in the list
Removing attachments	Files can be removed using the delete button.



Section 4. Additional Details of the Incident

	This section contains mandatory and optional fields.
What is a recurrence?	This section is used if the same incident occurred again in the same day/shift and the incident group and type remain the same. For example, a client was aggressive towards staff at 7am and s/he/they was aggressive again on the same day at 1pm. You can enter as many episodes/recurrences by clicking *Add another record* button.

Please tick (as appropriate) the emergency response called

Can I tick multiple options?	Yes. Tick all the options that are appropriate to the occurrence of the incident.

Please tick (as appropriate) if anyone involved in the client incident required medical treatment

Can I tick multiple options?	Yes. Tick all the options that are appropriate to the occurrence/episode of the client incident.

Section 5. Details of the People/Persons Involved in the Client Incident (if known)

People/Persons Categories		Affected Person – The person who has been affected by an incident. Alleged Person – The person who has been accused of a client incident. Other terms having the same meaning include Alleged Perpetrator, Person of Concern and Subject of Allegation. Other Person – Additional persons involved including Alleged Persons, Affected Persons, Witnesses, Provider of the incident.
		This section contains mandatory and hidden fields.
		You must add at least one person's details (even if it is just yourself as **Provider of Incident**)
	A Person Record consists of a section for the person's details and, if appropriate, a section for the details of their advocate (opened by ticking a checkbox).	

Which episodes is this person involved in?

What is the episode this person is involved in used for?	This section is used if the same incident occurred as multiple episodes in the same day/shift. You can enter as many episodes/recurrences by clicking *Add another record* button.

Section 6. Contact Details

Recorder of Incident (You)

How is this section used?	Your name and email address will be included in the email that is sent to the owner when you save the form.
I'm logged in … do I need to complete this this section?	Yes. The system cannot populate these fields for you.
I'm the provider of the incident … do I need to complete this section?	Yes. The system cannot populate these fields for you.

Section 7. Incident Owner

Select the Owner	Either start typing a name and the system will return a list of matches or you can scroll down the list. NOTE: Allow the system a few seconds to find the correct person for you after starting to type a name before assuming the person is not listed. The system has to search a very large database.
Who can I select?	You can only select from the list of registered system users.

When to assign to the CI Team	If you selected *Yes* for the *"Serious incident where TSA personnel is the alleged person and/or owner conflict of interest"* fields, the ownership will automatically default to the Continuous Improvement Team ('CI Team THQ') who will assign the Incident to the correct person in a way that means no-one else at that site can view the Incident. NOTE: You should only select CI Team THQ if: • The alleged person is your line manager or someone else within your management structure who will see the incident if assigned to your line manager. • There is otherwise a conflict of interest (i.e., your line manager or someone else within your management structure has some kind of personal relationship with the alleged person or affected person, such as being a family member)
Who should I select?	Many TSA Personnel will select their Line Manager and you should do so unless you have been otherwise directed or you have identified you need to make the client incident 'Confidential', in which case the Continuous Improvement team will be assigned.
What if the person isn't listed?	1. Check the spelling of their name e.g., in Outlook 2. Ask your manager or someone else in your team for advice. Sometimes a specific person may be appointed to manage Complaints for multiple sites/services. 3. After the above have been tried unsuccessfully, tick the missing owner checkbox and follow the instructions
	If the expected owner is missing, you should consult your mission specific *Incident Categorisation Notification Table and Definitions (GO_QA_CHA-XX_TCIM)* to determine whether it is necessary to tell that person about the Incident by another means e.g. email/face to face just in case the Continuous Improvement Team cannot reassign the Incident in a timely manner

Saving the Form as Draft (Logged in Users only)

Save as Draft – Logged in users only

Save as Draft	Logged in users may save the form for later completion.
	The Site/Service section must be completed before you can save as draft.
	The Save as Draft function is not available to Portal users.
Summary Page	The *Summary Page* for the Incident will be displayed (if you have permission to manage incidents at the selected Site/Service).
	If you don't have permission to manage incidents at the selected Site/Service, you won't be able to see the *Summary Page* or complete the Incident Report. Managers can authorise access to SolvSafety for a designated staff member using the *SolvSafety Access Request* Form in ServiceNow (HR).
Re-opening for edit	An Incident Report can only be edited via its *Summary Page*

Summary Page – Progress Buttons

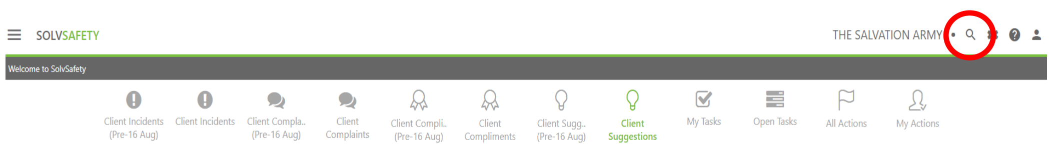
Progress Buttons	On the *Summary Page* for the Incident a vertical column of buttons indicates progress through the forms and activities for reporting and managing an Incident. As activities are completed the buttons change colour. Green buttons indicate that something is complete.
	• The first (green) progress button shows the Incident Identifier • The second (grey) progress button shows that the Incident Report is only partially complete
	It is a good idea to make a note of the Incident ID so that you can quickly and easily locate the incident if you don't plan to complete it immediately.

Summary Page – Re-opening a draft Incident Report for edit

Re-open the Incident	Select the grey *Incident Report* progress button. This will redisplay the Incident Report and you can continue editing.

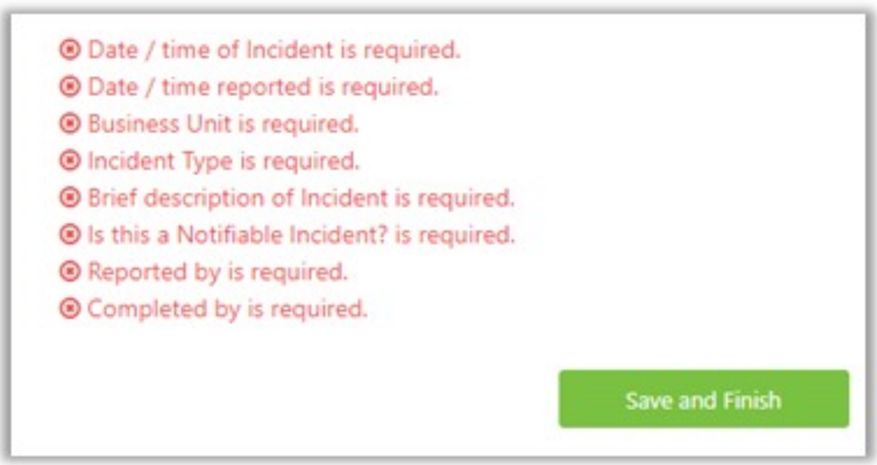
Resuming editing – finding the incident

By Search	1. Log in to the system 2. Open the *Main (Event) Search* at the top of the page (see screenshot below) 3. Select the required Incident ID– the *Summary Page* will be displayed
From My Tasks	The draft Incident Report will be listed on your *My Tasks* page – click on its ID to go to the summary page



Saving the Form (All Users)

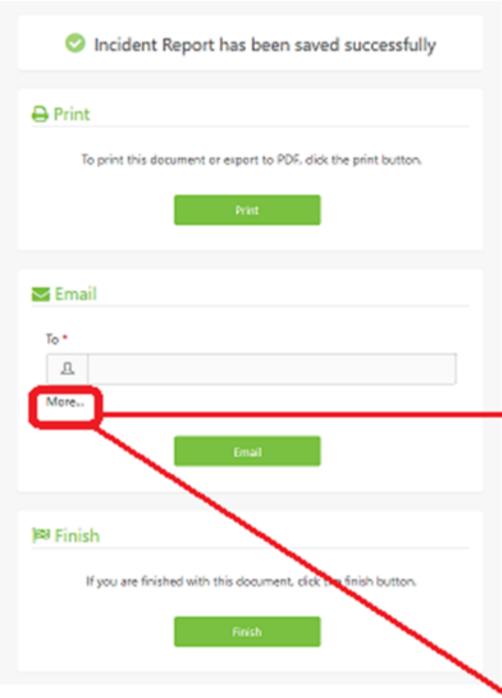
Save and Finish	Once the form is complete you can select *Save and Finish.* The system will check to see if you have missed any mandatory fields.
Correcting errors	Red error messages tell you which fields you missed and the fields themselves will be outlined in red to make them easier to find.



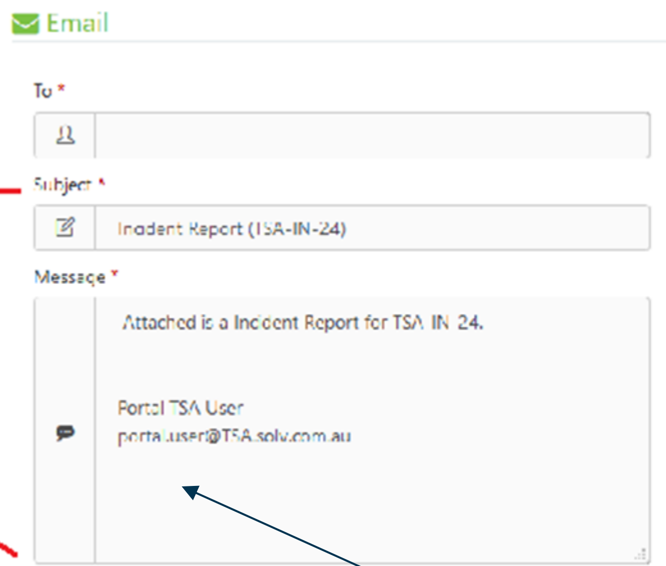
Emails to Owners	On Successful *Save and Finish:* An email will be sent immediately to the assigned owner informing them they have an incident to manage. This will include: • The name and email of the reporter • The Site / Service • The Incident Group and Type • The Identifier of the Incident • A link that will take them to the system
Incident Identifier format	Incident Identifiers have the format TSA-IN2-XXXX and are unique. Each 'X' would be a unique number.
Portal Users (no log in required)	• Portal users will see the *Complete Page* (see next section)
Logged in Users	• Logged in users will see the *Summary Page* for the Incident or their Home Page • Go to the Next Steps Section below.

The Complete Page – Portal Users only

What is the complete Page	The *Complete Page* is displayed to Portal Users once an Incident or Feedback Report has been submitted via the Portal
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 Incident 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)
Which Incident?	It is a good idea to make a note of the Incident ID in case you need to provide the Incident Owner with additional information.
What happens next?	When you select *Finish* you will be returned to the Portal page.



click the three dots to edit subject line and Message



Replace this with your name so that the Incident Owner doesn't have to go into the system to find out who send the email!

Next Steps

All Users - Notifications outside of SolvSafety

Category 1 incidents	⚠	For Category 1 client incidents you must <u>always</u> notify your manager directly (e.g. in person or by phone) to advise them that an incident has occurred. Additional notifications may be required – see *Incident Categorisation Notification Tables and Definitions*
Category 2 and 3 incidents		Additional notifications may be required – see *Incident Categorisation Notification Tables and Definitions*

Providing Additional Information after Save

Portal Users	If you cannot log into the system/ don't have visibility of incidents at the selected site/ service, you must contact the Incident Owner by another means to provide additional information about the Incident.
Users with a System login	If you can log into the system and have visibility of incidents at the selected site/ service, you can log into the system and edit the Incident Report Directly. See: *Work Instruction – Manage an Incident*

Progress Updates

No automatic updates	The system does not send updates to the Recorder of a client incident automatically
Portal Users	Depending upon the Incident Type the incident owner may keep you informed on the progress of the incident
Users with a System login	If you can log into the system and have visibility of incidents at the selected site/ service, you can view its progress within the system

Management

To Manage an Incident	See: *Work Instruction – Manage an Incident*

Related Documents and References

Related Policy Documents	Incident Management Policy Client Incident Management Procedure SolvSafety User Guide – Manage an Incident Incident Categorisation Table: Salvos Stores Employment Plus Social Mission Salvos Funerals Community Engagement Salvation Army Housing Corps SAID Aged Care – Salvos Home Care
Related Legislation	N/A
Related Accreditation	N/A
Other Relevant Documents /Resources	N/A

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.
Affected Person	The person who has been impacted or affected by an incident.
Alleged Person	The person who has been accused of causing a client incident. Other terms which have the same meaning include: ▪ Alleged Perpetrator; ▪ Person of Concern; ▪ Subject of Allegation.
Category 1 client Incident	A critical incident or alleged critical incident that has occurred in the course of TSA service delivery such as: ▪ An unexpected death within service delivery; or ▪ A significant, negative physical and/ or emotional impact on the affected person and which is/ would be expected to be permanent or long-lasting, such as injury, self-harm, overdose, mental health episode etc requiring hospital admission as an in-patient. A criminal act/ other serious breach of the law or code of conduct by TSA Personnel such as any forms of abuse against, with or in the presence of clients or any reckless/ negligent act, such as failure to make a mandatory report or provide other vital intervention.
Category 2 client Incident	A critical incident or alleged critical incident that has occurred in the course of service delivery such as: ▪ An expected death within service delivery or unexpected death outside of service delivery; or ▪ A major, negative physical and/ or emotional impact on the affected person and which is/ would be expected not to be permanent or long-lasting such as…an assault, injury, self-harm, overdose, mental health episode etc requiring medical attention but not hospital admission as an in-patient. A serious breach of the law or code of conduct by TSA Personnel, such as discriminatory conduct towards a client, financial abuse, spiritual abuse or other inappropriate conduct (Not sexual in nature).
Category 3 client Incident	A non-critical incident or alleged non-critical incident that has: a minor physical/ emotional impact on the affected person and which is/ would be expected to be short-lived such as common assault, injury or self-harm requiring first aid or minimal to no treatment.
Client Incident	*An unplanned, undesired event including allegations that result in an adverse effect or near miss on an individual, TSA or any other person engaged with TSA and its operations.*
Incident ID	Every incident in the system has a unique identifier with the format TSA-IN2-X where X is a number. E.g. TSA-IN2-1.
Incident Management System	A TSA IT system designed to record, manage and notify on client incidents, complaints and other feedback.
Logged In User	An incident owner who has the responsibility for the review and management of client incidents and is logged in to SolvSafety using their username and password.
Portal	A webpage that allows users to create Incident and Feedback reports without logging in.

Term	Definition
Portal User	Someone who records a client incident without logging in to SolvSafety
Provider of Incident	The person who reported the incident and provided details. This may be the same person as the Recorder.
Recorder	The person filling in the form.

Document Control Information

Theme	Governance
Category	Quality Assurance
Document Owner	Governance Lead – Office of the Chief Secretary
Document Implementer	Head of Quality and Safeguarding
Approval Authority	Chief Secretary
Review Date	October 2023
Next Review Date	October 2026
Previous Documents	N/A

Document History

Date	Summary of Changes
07/08/2020	Inaugural version
09/10/2023	Scheduled review