SolvSafety User Guide – Report an Incident

Contents

Overview

System	Incident and Feedback System (SolvSafety).	
Purpose	This document provides information on how to report a client related 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.	
Audience	Anyone who wants to report an Incident using either the SolvSafety Portal or as a logged in System User.	
Related Documents	*Incident Management Procedure*	GO_QA_PRO_TCIM
	Incident Categorisation Notification Table and Definitions	GO_QA_CHA-02_TCIM
	SolvSafety User Guide – Manage an Incident	GO_QA_GUI-02_TCIM
Date	7/08/2020	

Symbols and Glossary

	**This symbol indicates either a special note or an attachment.**
	This symbol highlights a matter that may have serious personal or 2organisational impact if not considered or acted upon.
	When you see this symbol there is a checklist to complete.
Incident ID	Every incident in the system has a unique identifier with the format TSA-IN-X where X is a number. E.g. TSA-IN-1.
Logged In User	Someone who has already logged in to SolvSafety using their username and password.
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
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.
SolvSafety (The System)	The Incident and Feedback System is supplied by a company called Solv; it is a customized version of one of their products SolvSafety.

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).

Hyperlink	Hyperlink Description	
salvationarmy.org.au	The Salvation Army in Australia territorial website	Edit Delete

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
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 the form (e.g. choosing from a list or ticking a checkbox) may result in some data entry fields being displayed or hidden. This is so that you

	don't have to fill in fields that are not relevant.
If you re-hide it then clear it first!	Even though you can't see the data in those hidden fields it is still there unless you manually clear it. When someone runs a report that refers to a hidden field the system will see the data and include the Incident or Feedback record in the report results. So, clearing the fields before hiding them again will improve reporting.

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.

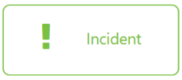
Validation of Fields

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

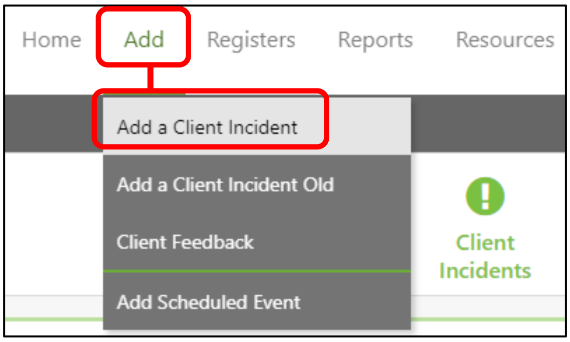
Go to the Portal	SolvSafety - Portal
	If the link does not work, then paste https://app.solv.com.au/#/app/accountportal/7C/a8KHXwtOWI5VVhLasbeu/7C6C56 into your preferred web browser search bar
	Bookmark the web page so you can go straight to it next time
To open the form	Click on the Incident Icon



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
	Contact continuousimprovementthq@salvationarmy.org.au for assistance if you cannot log in. In the meanwhile, you can make a report via the portal
To open the form	On the top Menu bar select the *Add* 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).

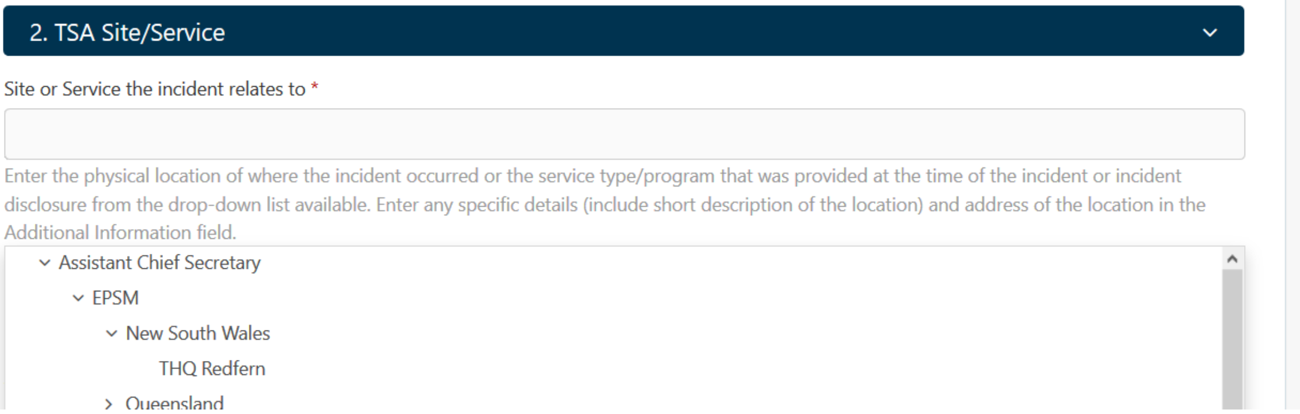
Incident Categorisation

	Mission/Stream is a Mandatory 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.
	Incident Categorisation Notification Table and Definitions explains more about the Incident Categorisation used within TSA.
Incident Group and Type	Selecting the Incident Group determines which Incident Types you will see. Selecting the Incident Type determines the Incident Category.
Incident Category	Category 1 is the most serious and Category 3 is the least serious. 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 make your best guess.
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

	Site/Service is a Mandatory Field
	Be careful when selecting a Site/Service as the full path must be correct e.g. Searching for Leongatha Corps might turn up two quite different answers Community Engagement>Doorways>Victoria>Leongatha Corps Social Mission>Family & Domestic Violence>Victoria>Leongatha Corps
Selection by drill down	To select a site and service you must drill down the structure to the bottom (i.e. there is no > next to the entry)

Selection by search	You can start typing the name of the Site/Service and will see options matching your search string
	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. Tick the *Site Not Listed* checkbox and follow the instructions



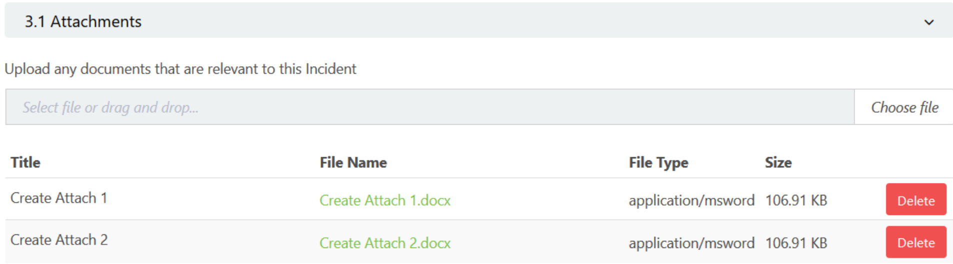
General Incident (not location specific)	If the incident is general in nature and not related to a specific location, then initially select your own Site/Service.

Section 3. Description of the Incident or Allegation

	This section includes Mandatory fields and optional fields.

Section 3.1. Attachments

What are attachments	An attachment can be any kind of file e.g. Microsoft Office files like word or excel, Photos, PDFs
	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 3.2 Hyperlinks

What is a hyperlink	A hyperlink is a link to a file in SharePoint or another computer system or a link to a web page. You may also know them as URLs – examples of hyperlinks include www.salvationarmy.org.au https://salvosau.sharepoint.com/ and salvationarmy.org.au
Format	The hyperlink is stored as a record with two parts – the text and an optional description.
When is a description needed?	If it is not obvious what the link is to you should provide a Description. E.g. https://salvationarmyprod.service-now.com/tsaportal?id=sc_cat_item&sys_id=8d4afaf8dba784107c58993af4961958 takes you to the COVID-19 Issues Register but as this is not obvious an appropriate description would be "COVID-19 Issues Register".
Using hyperlinks	Hyperlinks in SolvSafety are just stored as text. i.e. you can't click on them and go immediately to the document or web page. If you want to check your hyperlink, then copy and paste the hyperlink text into your chosen browser to access the webpage or document.
How to add/delete/edit a hyperlink	See section on records above for more information about records in SolvSafety.

Section 4. Additional Details of the Incident

	This section contains mandatory and optional fields.
What is an occurrence?	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 he 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 incident required medical treatment

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

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

	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 is this person 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 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.
Who can I select?	You can only select from the list of registered system users.
	If you selected *Yes* or *No* for the *"Serious incident where TSA personnel is the alleged person and/or owner conflict of interest"* fields. If you selected *Yes,* the ownership will automatically default to the Continuous Improvement Team who will assign the Incident to the correct person in a way that means no-one else at that site can view the Incident.
Who should I select?	Many TSA Personnel will select their Line Manager and you should do so unless you have been otherwise directed.
What if the person isn't listed?	1. Check the spelling of their name e.g. in Outlook 2. Ask you manager or someone else in your team for advice. Sometimes a specific person may be appointed to manage Complaints for multiple sites/services. 3. 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

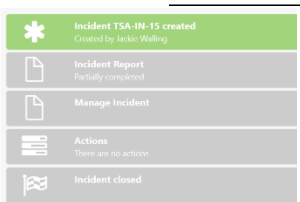
Saving the Form as Draft (Logged in Users only)

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. Contact ContinuousImprovementthq@salvationarmy.org.au for assistance in this instance.
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. Enter the Incident ID into the *Main (Event) Search* at the top of the page (see screenshot below) 3. Select the Incident – 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

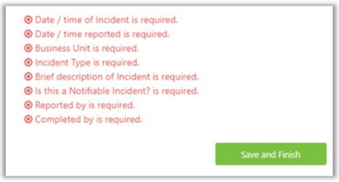
Saving the Form (All Users)

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
- An extract from the description
- The Identifier of the Incident
- A link that will take them to the system

Incident Identifier format

Incident Identifiers have the format TSA-IN-X where X is a unique number.

Portal Users

- 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!)

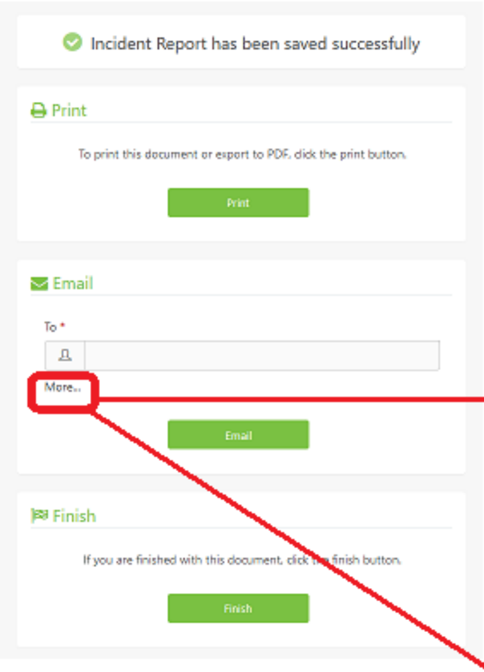
Remember to include your name and contact details in the email so that the recipient knows who sent it (this information can't be included automatically)

Which Incident?

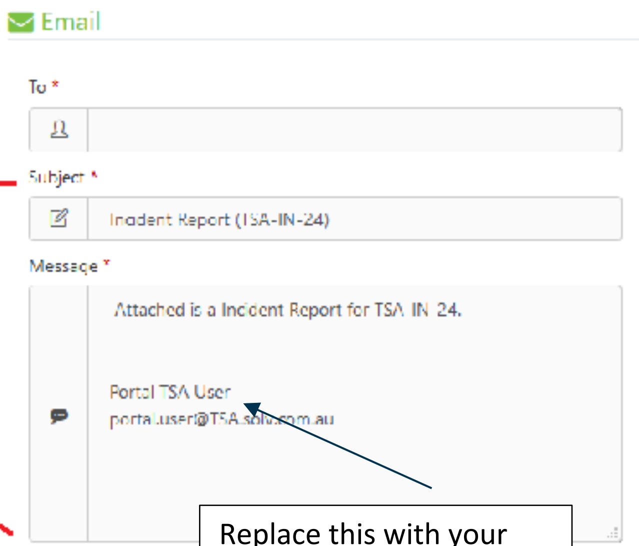
It is a good idea to make a note of the Incident ID in case you need to provide the Incident Owner with additional information.

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 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 Reporter of an 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*