SolvSafety User Guide – Manage an Incident

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Overview

Overarching policy	This user guide is implementing the Incident Management Policy.
System	Incident Management System (SolvSafety).
Purpose	This document contains: ▪ A process overview identifying the SolvSafety forms and how they are used in the management process. ▪ High level information on the standard features of SolvSafety that may be used when managing an Incident 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.
	This document does not: ▪ Duplicate in detail information available in the *SolvSafety Help Centre* ▪ Contain detailed information on every field of every custom form This document must be read in conjunction with the related procedure.
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	18/04/2024

About the Incident and Feedback Management System

Purpose	The Incident and Feedback Management 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. New users will receive an email from SolvSafety with instructions to set this up. This needs to be completed before you can login.

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 *My Tasks Page* 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. continuousimprovementthq@salvationarmy.org.au .

Logging out / System Timeout

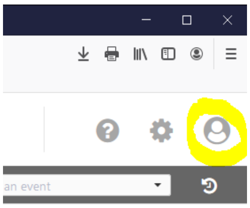
System timeout behaviour

Users will remain logged in even if the browser is closed and the PC is powered off. The system will time out after approximately an hour.

Log out manually to reduce the risk of non-authorised users accessing the system.

How to logout

Left click the profile icon at the top right of the page and select Logout on the dropdown menu.



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

The form should:

- Summarise the help required clearly
- 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**-X	TSA-IN2-21
Complaint	TSA-**CX2**-X	TSA-CX2-3045
Compliment	TSA-**CV2**-X	TSA-CV2-200
Suggestion	TSA-**SG2**-X	TSA-SG2-6

Overview of the SolvSafety Management Process

Triggers	Owners may become aware that they have an Incident to manage when they: ▪ Receive an email from SolvSafety ▪ Are informed outside SolvSafety (e.g., phone call or email) ▪ See that an incident has appeared in SolvSafety e.g., in a dashboard or task list

Key Activities

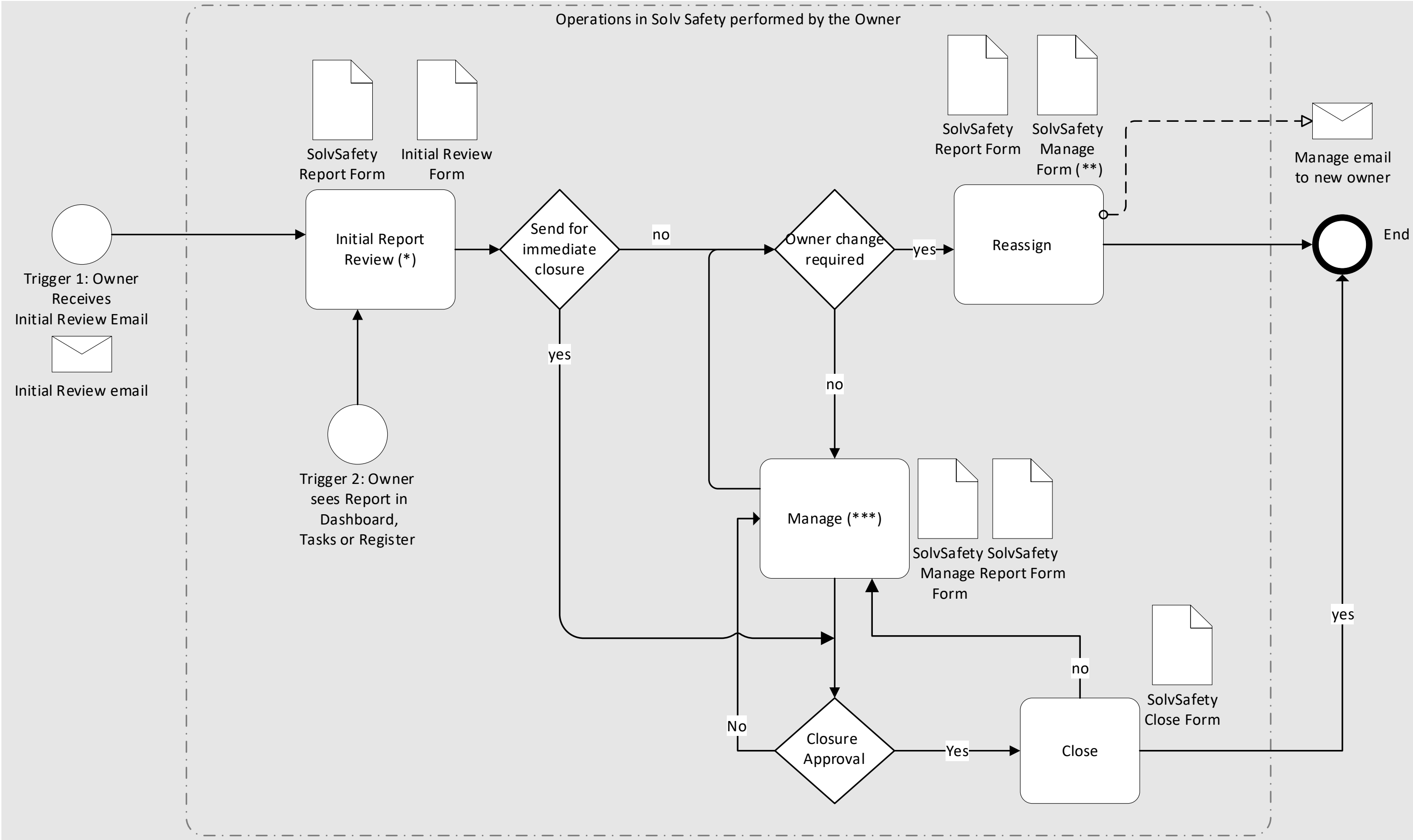
Activity	Goal	Useful Sections
Review the Email	Determine the urgency, subject and need for immediate reassignment	Review the Manage Email
Review the Report	Understand the issue, confirm categorisation and identify any immediate next steps for action or follow up	Review the Original Report
Reassign	Assign the Incident to the correct owner/location	Reassign
Manage	Record management activities and ensure that no steps are missed	Common Management Activities Complete the Manage Incident Forms
Close	Finalise the Incident so that it is identified as closed during reporting	The Close Form – Finalising the Report
Re-open	Add any new information or missed information not included in the original management process. To complete this you will need to contact either your Quality team/leader or the CI team.	Re-open closed Incident

Forms used in Management

SolvSafety Forms	See the table and process diagram below to see how forms are used for management of Incidents.

Form	Completed by	Edited by	Standard Form or Specific to TSA?
Incident Report	Reporter	Owner	TSA Specific
Initial Review - Incident	Owner	Owner	TSA Specific
Notify Form	Owner	Owner	TSA Specific
Manage Incident	Owner	Owner	TSA Specific
Incident Closure Approval	Owner	Owner	TSA Specific
Action	Owner	Owner	Standard
Close	Owner	Owner	Standard

Manage Process



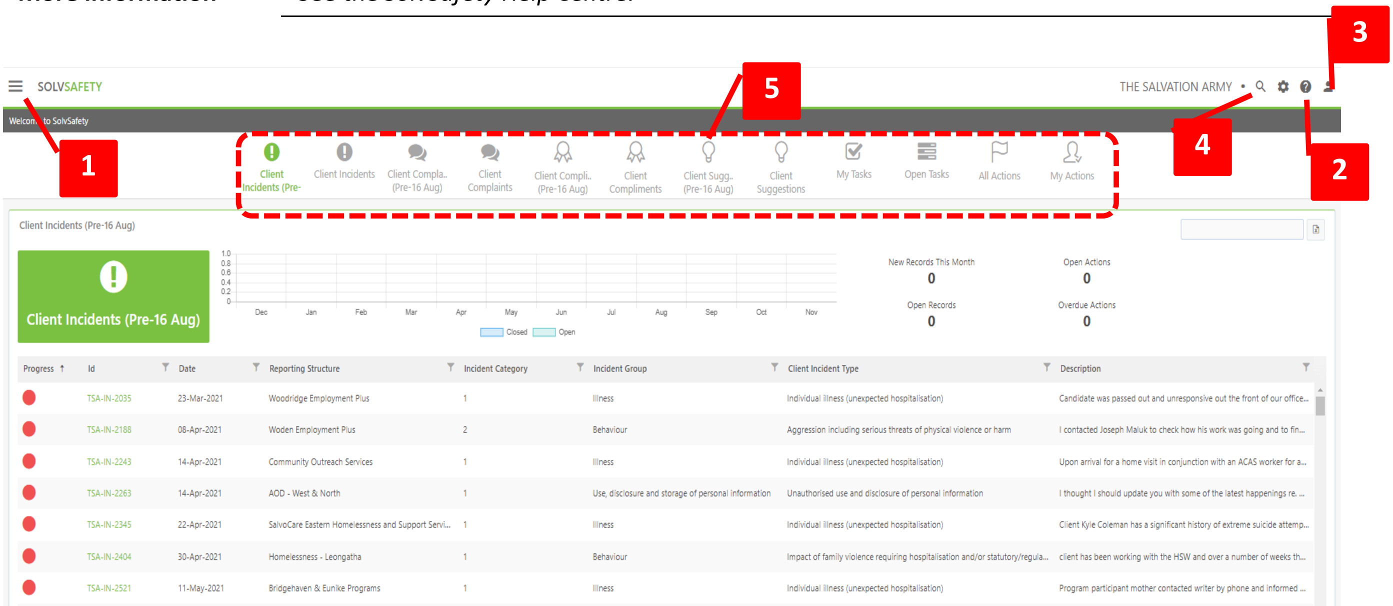
(*) The owner may update the Report Form e.g. with additional information received since the report was made
(**) if reassignment takes place after management form has been created then reason for reassignment should be recorded in the Manage Form notes
(***) The time required to complete management actions may vary and may require revisiting SolvSafety on multiple occasions

Standard SolvSafety Pages and Functionality

In this section	▪ The *Home* Page Dashboard and Menu Icons ▪ The *Summary Page* ▪ Standard Form Features and Behaviour

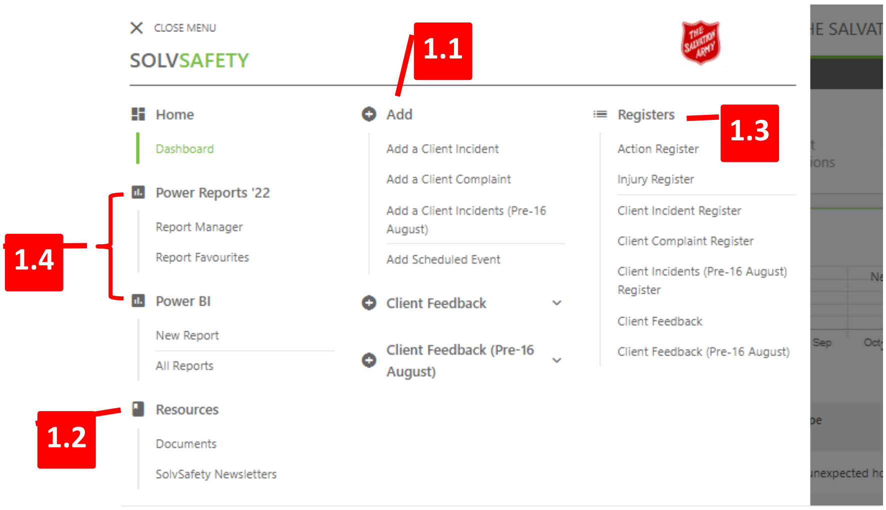
The Home Page Dashboard

Which Home page will I see?	The user's *Home* Page Dashboard 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, 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 incidents 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 <u>not</u> 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 a specific record using an ID
- View the last 10 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 in 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 Incident and Feedback together with the due dates where the user • 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 managed by others 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 managed by others across multiple locations.	

The Summary Page

Overview

This page is the “home page” for all aspects of management of a specific Incident.

Getting to the page

Users see this page when they click on a link to a specific Incident within SolvSafety.

This page is usually redisplayed when the user selects *Save and Finish* or *Save as Draft* on a Form.

Additional help on this page

See the *SolvSafety Help Centre*.

Progress Buttons

Progress Buttons

On the *Summary Page* 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 a record has been closed
- Red requires action
- Grey buttons indicate that a form is not complete / enabled

TSA Forms

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

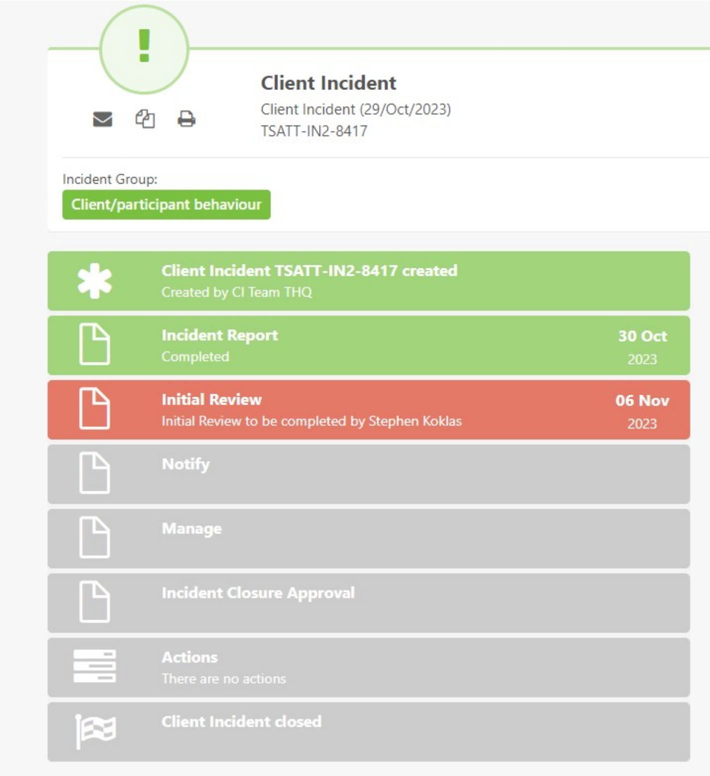
In the screenshot below

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 Incident Report form requires action on the Initial Review

The remaining (grey) *Progress Buttons* have not been actioned / enabled yet.



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 required. E.g., as incidents can involve multiple people the form allows the user to 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 / Delete	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
What happens to data in the data entry fields of a record when the form is saved?	When the form is saved any records in the record list will be saved together with any data still in the data entry field. E.g., If there are 4 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	Mandatory fields must contain data when *Save and Finish* is selected, or an error will be reported.
Save as Draft	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 unclear hidden fields data may cause incident record not 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 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. 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	▪ Initial Review ▪ Open a Form to edit it ▪ Open a Completed Incident Form – view only ▪ Manage Attachments ▪ Add a Note from within SolvSafety ▪ Send an Incident related Email from within SolvSafety ▪ Add a Note using Outlook ▪ Re-open closed Incident

Open a Form to Edit it

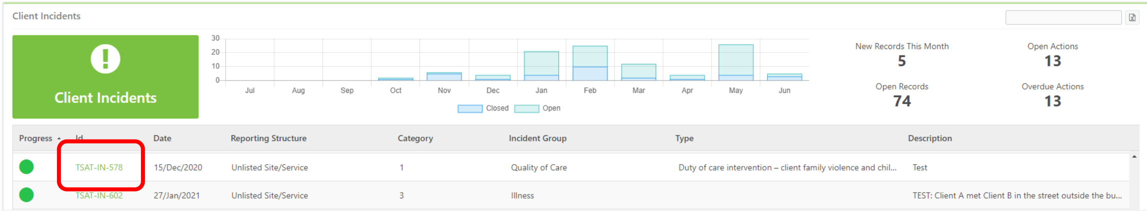
Form requiring initial action **(Red button)**	To Open, click on the *COMPLETE* form link in the notification email
Completed Forms (green buttons)	To re-open a completed form in edit mode from the *Summary Page*: ▪ Select *Add Information* -> *Edit* <form name> Also see: Re-open closed Feedback.
Partially Complete Forms (orange buttons)	Clicking the button will open the form in Edit mode.

Open a Completed Incident Report Form

Display the Client Incident Home page

To Open, click on the *Client Incident* icon on the Home Page Dashboard.

Select and click on the form ID.



Manage Attachments

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

Important Behaviour note:

The system treats Attachments differently:

Dependency between Report and Manage Forms

Attachments added to the Incident Report Form will be shown on the Report and Manage both forms.

Attachments added to the Manage Incident 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 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.

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.

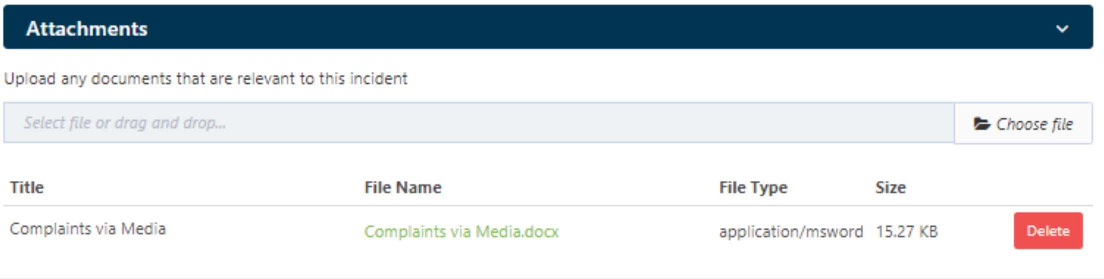
Removing attachments

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

Deleting an attachment that is shown on the Incident <u>Report</u> Form <u>will delete it from both forms.</u>

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



Add a Note from within SolvSafety

Overview

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

When to use

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

Disadvantages

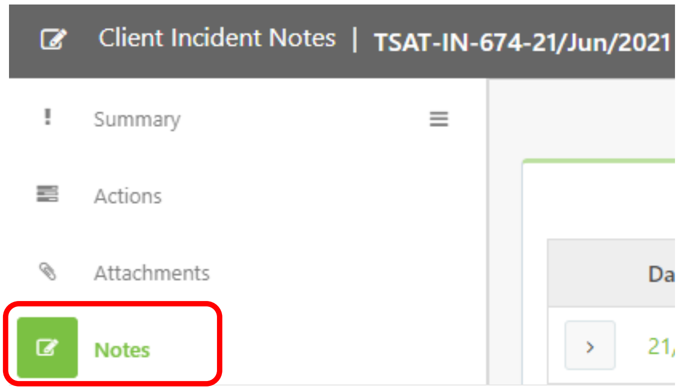
It may not be obvious to a new Owner that an Incident Report has notes attached to it, so information added in the notes section may be missed if ownership is transferred.

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

- Pin a note to the *Summary Page* e.g. This Incident 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 option on the menu.



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

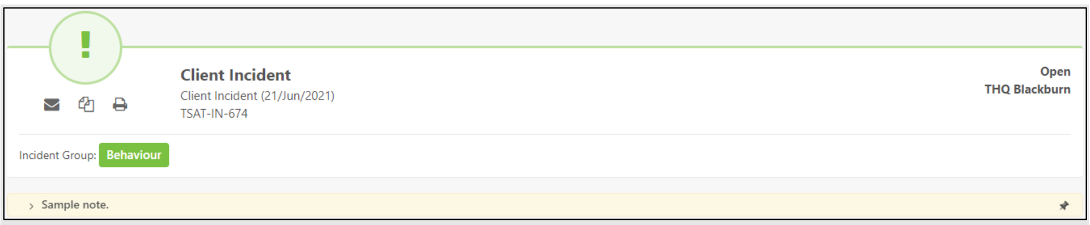
Notes may also be added to a Incident record by email (see: Add a Note using Outlook).

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 an Incident related Email from within SolvSafety

Overview	Owners can send an email related to the Incident 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 *Summary Page* of the Incident.
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 *SolvSafety Help Centre* and search for *emails.*

Add a Note using Outlook

Overview	Anyone who knows the ID of an Incident 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 Incident, but instead record in the system that the emails exist.
Ensuring future replies are not automatically added	Where an email has multiple recipients and someone selects Reply All then the responses will also be attached to the Incident, even if the email is not relevant to the Incident. To avoid this: 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 *SolvSafety Help Centre.* Click the ? icon at the top right of a SolvSafety page and search for *notes* 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: ▪ Was the correct ID used? If the wront ID is used the email will be attached to the wrong Incident 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 Incident

Can a closed Incident record be opened?	Yes, but only a small group of users can do this. If you wish to re-open a closed incident contact the Quality Team/Lead in your Mission/Stream or the CI team. This is done via the *Summary Page* for the Incident record. Select the *re-open* option in the *Add Information* pane. See the *SolvSafety Help Centre* for more information. Once the Incident 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	▪ Initial Review Email
	▪ Review the Original Report
	    ○ Reassign
	    ○ Send for immediate closure
	▪ Notify
	▪ Manage the Incidents Forms
	▪ Incident Closure Approval
	▪ Actions
	▪ Finalise the Report

Initial Review Email

Goal	To determine whether the initial review task is: ▪ Intended for another owner ▪ To be sent for immediate closure (i.e., not a client incident, duplicate record) ▪ Blocked – the chosen Site/Service is incorrect ▪ Correct incident categorisation selected
When does this activity occur?	Once a Report is created in SolvSafety an email is automatically sent to the assigned owner – See examples of the from/subject line below.
The Initial Review Email	In outlook the email will look like the screenshot below: [BULK MAIL] Initial Review Required in SolvSafety

Email Contents	The email contains: ▪ Reference ▪ The SolvSafety ID (see section above for formats) ▪ Scheduled Date ▪ The Business Unit (Site/Service) ▪ The name and email of the reporter (as entered in the system) ▪ *A COMPLETE FORM* link to the system
Determine urgency	It may be clear from the combination of report type and category 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 Incident. 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 Incident 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 Incident exists. 2. The incorrect owner must then 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: Login to SolvSafety (see instructions in an earlier section)	The user’s *Home Page* 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 Incident record.	The *Summary Page* for the Incident record will be displayed.

Option 2: Access by email link

	Action	Outcome
1	If you are already logged in the Initial Review, select the Email Link.	The *Initial Review Form* for the Incident is displayed. 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.

Open the Initial Review Form

Goals	1. Review the Incident form 2. Select either or both check box options: a. I have reviewed the Incident Report and accept ownership b. Send for immediate closure OR 3. Select the *Cancel* button to return and edit the Incident form
Starting Page	*Initial Review – Incident Review and Acceptance* Page.

	Action	Notes
1	Open the *Initial Review Form* link in the Initial Review Required email.	The form will be displayed in the edit mode.
2	Review the form to determine whether to reassign to another Owner. Review the form to determine whether to change the Group or Type.	If an owner reassignment is required, *Cancel* the Initial Review form and edit the incidents form. If a change in the Group or Type is required, *Cancel* the Initial Review form and edit the incidents form. If the assigned owner is correct, click on the *I have reviewed the Incident Report and accepted ownership* check box.
3	Send for immediate closure.	If it is not an Incident or it's a Duplicate that has already been raised, click on the *Send for immediate closure* check box.
4	Close the *Review Incident Form*.	*Client Incident Summary Page* will be re-displayed.

Report Review Outcome	Action
Incident report owner correct	1. Select *Yes, I have reviewed the Incident Report and accepted ownership* check box. 2. Click on the *Save and Close* button.
Reassignment Require	1. If an owner reassignment is required, click on the *Cancel* button on the Initial Review form. 2. From the Summary page go to the 'Add Information' dropdown box and select 'Edit Incident Report' and edit the owner details. 3. Click on the *Save and Close* button. 4. The new owner opens the *Initial Review Form;* selects the Yes check box *"I have reviewed the Incident Report and accepted ownership"*. 5. Click on the *Save and Close* button

Group or Type change required	1. If Group or Type change is required, click on the *Cancel* button on the Initial Review form. 2. From the Summary page go to the 'Add Information' dropdown box and select 'Edit Incident Report' and edit the Group or Type details. 3. Click on the *Save and Close* button. 4. Open the *Initial Review Form*, select *Yes, I have reviewed the Incident Report and accepted ownership,* check box. 5. Click on the *Save and Close* button.
No action on Report Form required	1. If no further action is required, select *Yes, I have reviewed the Incident Report and accepted ownership.* Click on the *Save and Close* button. 2. Click on the *Send for immediate closure* check box only if the incident report is a duplicate or it is not a client incident. 3. Record the reason for immediate closure in the text field. Click on the *Save and Close* button.

Notifications

The notifications page is used to provide additional notification not within the direct line management structure or to record internal and external notifications

Notifications	Action
Suppress sending of auto notifications	1. Click on the *Yes* or *No* button. This will suppress emails to managers below the GM/EM/DC/SM (Housing) if the incident type is of sensitive nature (if notifications were selected). 2. Tick any of the appropriate *Did the incident result in* check boxes.
1.1 Additional Notifications (not within direct line management structure)	1. Select from the dropdown list the TSA department/specialist area. 2. Multiple notifications may be enabled using the *Add additional notification* button.
1.2 Record of Internal Notifications	1. Record internal notifications made in this section. Incident communications should be recorded in the actions. 2. Multiple records may be included using the *Add another record* button.
1.3 Record of Other Persons Notified of the Incident (subject to consent)	1. Record details of the client's/affected person's next of kin, guardian, key support person or any relevant external parties that have been contacted in response to the incident. For child safeguarding incidents – If you have any concerns about notifying the family, please contact your Safeguarding Consultant. 2. Multiple records may be included using the *Add another record* button.
1.4 Record of Funding or Contractual Notifications or Reporting	1. Record the details of any notified relevant external parties in accordance with funding, contractual and regulatory obligations. 2. Multiple records may be included using the *Add another record* button.

1.5 Notification Related Comments and Notes	1. Record any additional related comments and/or notes. 2. Multiple records may be included using the *Add another record* button.
Closing Notifications	3. Click on the *Save and Finish* button.

Complete the Manage Incidents 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 incidents.

Attachments

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

Manage Incident Form

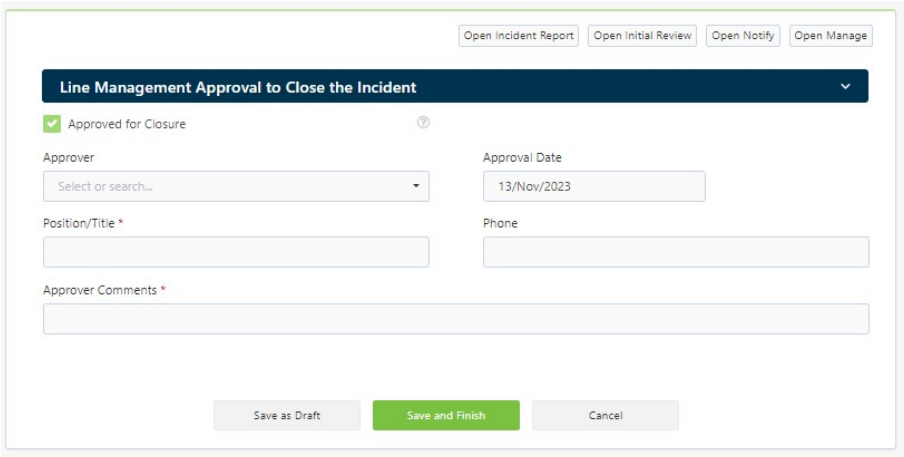
Also see: Incident Management Procedure.

Section	Title	Action	Mandatory Fields (*)	Hidden Fields
1	Incident Update	Select applicable medical treatment received and any additional information available since the incident report.	yes	no
2	Investigative Activity	Investigation/Review not required check box. Fields not visible when checkbox ticked.	yes	yes
3	Actions	2.1 Actions Taken Tick check box/es as required. 2.2 Action Comments Enter details if required. Add another record.	no	no
4	Internal Approval of Investigative Activity – Mandatory for categories 1 and 2.	Hidden for Cat 3, Revealed for Cat 1 & 2. Complete mandatory fields and other fields as required.	Yes (if visible)	no
5	Closure	Nominate your upline manager or the person authorised to review the closure of the incident. For Category 3, you can nominate yourself as the reviewer. Save as draft or Save and Close or Cancel	yes	no

(*) mandatory fields need only be completed if they are visible

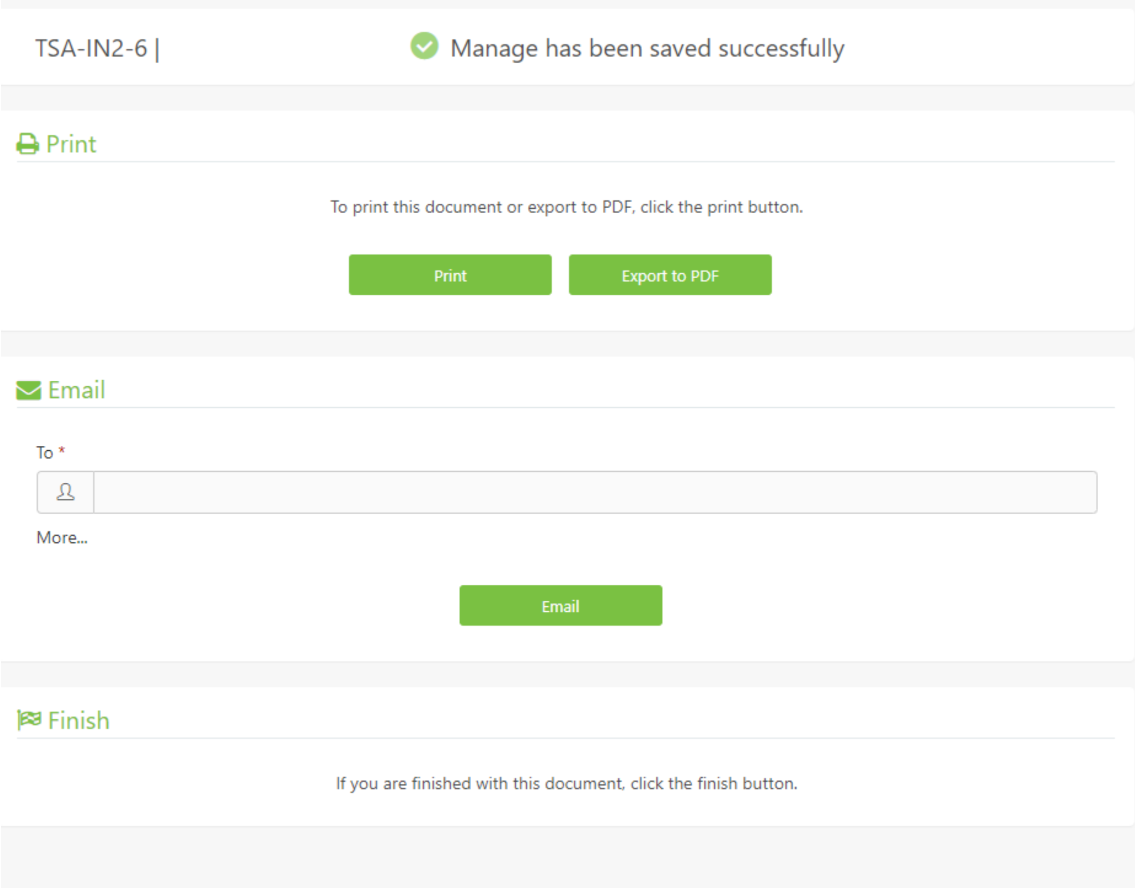
Incident Closure Approval

Line management approval is required to close the incident. For Category 3 incident, the owner can close the incident (refer image below).



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 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)
What happens next?	When you select *Finish* you will be returned to the Summary page.


TSA-IN2-6 |
Manage 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.

Related Documents and References

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

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.
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.

Term	Definition
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	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.
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.
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 Complaint, Compliment, or Suggestion. Feedback may be received from individuals or from organisations and provides an opportunity for improvement of services, products or processes.
Incident record	Incident record in the System. The record consists of all the forms and accompanying notes.
Identifier ID (SolvSafety)	Every report in the System has a unique identifier with the format TSA-IN2-X where the 'IN' code represents an 'Incident' report and X is a number. E.g., TSA-IN2-3721 is the identifier for an incident.
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.
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 *Summary Page* for an Incident report. The colours and text indicate the status of the different forms associated with management of the Incident.
Recorder	The person who completed the original Incident Report form.
Register	A searchable and sortable list of Incidents or Feedback within SolvSafety.
Summary Page	This is the home page for an Incident. From this page all the forms associated with the Incident report can be accessed and managed.
The Salvation Army (TSA)	The Salvation Army - Australia inclusive of all Mission expressions and Mission Enablers.

Document Control Information

Theme	Governance	
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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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