Incident Management

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Contents

Incident Workflow

An unplanned event which results in a negative outcome

Incident—First Report

- Add a new incident record by clicking 'Add New' from the navigation bar, click 'Incident' and fill out the report using an incident scenario you create. Here are some pointers for you to consider:
    - Add as many details as possible. This information will assist the person responsible for the investigation.
    - Classify the incident using all incident type options that apply. Hover your mouse over each incident type to learn more about them. The selection(s) that you make here are extremely important as they will impact your investigation stage. The investigation stage will be reformatted to ask specific questions relating to the classifications which you choose.
    - Many users are set up with an account. When you are asked for someone's name, select the match from the list that appears after you've typed 3 consecutive letters. If you do not see a match, try using letters from a different part of their name.
    - Use the icon to add multiple pieces of the same type of information.
    - Use the 'Report Related' option found in the hamburger menu at the top right of your screen to relate incident records to each other. When a report is related the system will create a new record and copy general information such as: description, what, where, and when to the new record first report.

Incident—Investigation & Corrective Actions

- Access the incident record from your dashboard in the "My to Do" webpart, the monitor menu, or from the notification email link. Consider these points when completing the investigation:
    - Enter the details when they become available to the person responsible for the completion of the incident investigation. For example, if the person

involved is receiving medical aid enter the treatment provided details and save. If the person involved' s medical aid ends up causing lost work, enter the lost work when that is identified and save. The information provided regarding First Aid, Medical Treatment, Restricted Days, Lost Days and Fatality get incorporated into the calculation of incident rates.

- As the investigator, you will be able to see information that can be used to identify the person involved in the incident. However, there are very few individuals who will be able to see this incident, and even fewer who will be able to access this sensitive information.
- Click on the 'Open Risk Matrix' link to view the guide provided. The guide will pop up in a separate tab for you, so you do not need to worry about losing your spot in your investigation.
- Be sure to select all the root causes which are applicable to the incident.
- Ensure that you always save along the way. The 'save' option can be found in the hamburger menu at the top right of your screen.

Incident—Review, Pending Closure and Closed

- Access the incident record from your dashboard in the "My to Do" webpart, the monitor menu, or from the notification email link. Consider these points when completing the review and pending closure stage:
  - Ensure that all the information is correct.
  - Verify the corrective actions are appropriate.
  - Add any additional information that has not been completed.
  - Ensure that action items are completed.
  - Ensure that lost/restricted work information is completed.

Try this:

- [ ] Save your Incident as a draft.

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- ☐ Save and exit your incident during the investigation.
- ☐ Identify the Incident number of your saved draft.
- ☐ Add any attachments or pictures that may be helpful.
- ☐ Create a corrective action to help ensure this incident does not occur again.
- ☐ Add a comment for the person responsible for Incident Review.

Knowledge Check:

1. True or False: The person involved in the incident record must be an employee.
2. What would happen if all the mandatory fields are not completed when you try to push the record forward? ______________________________
3. True or False: Can I report two or more people involved when reporting an injury incident?
4. Why would you need to relate more than one record together? ______________________________
5. What happens when you select the 'Report Related' option? ______________________________
6. How does the 'Person Responsible for Investigation' field get populated? ______________________________
7. What are the two ways to find the records I am responsible for?
   i. ______________________________
   ii. ______________________________
8. What does the incident number mean? ______________________________
9. What are three incident workflow role names?
   i. ______________________________
   ii. ______________________________
   iii. ______________________________

10. How can I add a web link and why would I need to add a web link?

____

11. True or False: I can revert the incident back to the Investigation stage while in the Review stage.
12. True or False: I can close an incident that has open corrective actions.
13. Name two items that must be completed in the Pending Closure stage.
    i. ______________________________
    ii. ______________________________
14. When reporting an injury incident what field is used to calculate the incident rates?

____

Near Miss Workflow

An event that could have resulted in a negative outcome, but due to luck, did not

Draft	→	Investigation	→	Pending Closure	→	Closed
Reported by		Responsible for Investigation		Responsible for Closure		

Near Miss—First Report

- Click 'Add New' from the navigation bar, click "Near Miss" and fill out the report using a near miss scenario you create. Here are some pointers for you to consider:
  - Add as many details as possible. This information will assist the person responsible for the investigation.
  - Classify the near miss using all near miss types options that apply. Hover your mouse over each near miss type to learn more about them. Remember, for a near miss, you are selecting incident types for 'what could have happened.'

- Many users are set up with account and employment information already. When you are asked for someone's name, select the match from the list that appears after you've typed 3 consecutive letters. If you don't see a match, try using letters from a different part of their name.
- Use the icon to add multiple pieces of the same type of information.

Near Miss—Investigation and Corrective Actions

- Access the near miss record from your dashboard in the "My to Do" webpart, the monitor menu, or from the notification email link. Consider these points when completing the investigation:
  - Enter as much information and detail as possible into the investigation form.
  - Click on the 'Open Risk Matrix' link to view the guide provided. The guide will pop up in a separate tab for you, so you don't need to worry about losing your spot in your investigation.
  - Be sure to select all the root causes which are applicable to the near miss.
  - Ensure that you always save along the way. The 'Save' option can be found in the hamburger menu at the top right of your screen.

Near Miss—Pending Closure and Closed

- Access the near miss record from your dashboard in the "My to Do" webpart, the monitor menu, or from the notification email link. Consider these points when completing the pending closure stage:
  - Ensure that all the information is correct.
  - Ensure that action items are completed.

Try this:

- Add a weblink such as company policy or include an attachment.

- ☐ Create a corrective action to help ensure this near miss does not occur again.
- ☐ Add a comment for the person responsible for near miss closure.

Knowledge Check:

1. How is the workflow for a near miss different from an incident workflow?

   ____

   ____

2. What is different on a near miss first report -compared to an incident first report?

   ____

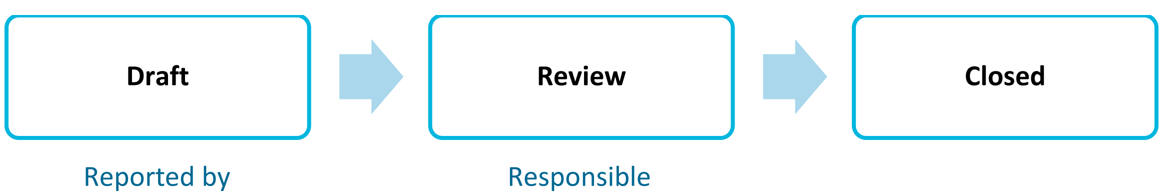
   ____

3. True or False: It is possible to convert a near miss to an incident.
4. True or False: A near miss can be closed with open corrective actions.
5. True or False: There is a difference between an incident injury and a near miss injury.
6. Who can see draft records? ____
7. What would happen if you checked more than one incident type in the 'What' component of the First Report?

   ____

Hazard Identification Workflow

A condition which has the potential to result in a negative outcome



Hazard ID—First Report, Review, Close

- Click 'Add New' from the navigation bar, click "Hazard Id" and fill out the report using a Hazard Id scenario you create. Here are some pointers for you to consider:

- Add as many details as possible.
- Classify the hazard using all incident type options that apply. Hover your mouse over each incident type to learn more about them. Remember, for a hazard Id, you will select all incident types that would have applied, if the hazard became an incident.
- Many users are set up with an account and employment information already. When you are asked for someone's name, select the match from the list that appears after you've typed 3 consecutive letters. If you do not see a match, try using letters from a different part of their name.

Try this:

- [ ] Save the hazard as a draft. Then, open your saved draft and submit your first report.
- [ ] Add any additional corrective actions that might be necessary.

Knowledge Check:

1. What are two differences between the first report for a Hazard Identification and an Incident?
   i. ______________________________
   ii. ______________________________
2. True or False: I can turn a hazard into a near miss or an incident.
3. True or False: I can close a hazard that has open corrective actions.
4. True or False: I can report my hazard at any location available in the location tree.

Tips and Tricks

- No single user "owns" an incident – there are people with responsibilities throughout the process of managing that incident.
- Use *Report Related* feature for an incident that resulted in multiple people getting injured.
- Include attachments when appropriate.

- Reference *Related Incidents* to easily toggle between multiple reports.
- Communicate information to users who will view the incident report by using *Comments.*
- 'Saving' the record or a corrective action does not push the record forward in the workflow.
- The "WHAT" category for a Near Miss and Hazard Id should be selected as "what could have happened if the scenario became an incident?"
- You can print a record by selecting the hamburger menu  at the top right of your screen.
- Certain users other than the person currently responsible for an incident can make edits to it – this is determined by the functional role of users
- Depending on your role, you can reopen an incident once it has been closed. This might be necessary if there are some additional details which need to be added.
- Depending on your role, a record can be deleted. All deleted records can be found by clicking on the recycle bin on the admin tab of the navigation bar; they can be accessed by system or global admins.