Quick Reference Guide
Incident Reporting Process

CSH&W SA

Incident Occurs

- Select the **Report New Incident** button on the home page of the Incident Database.

Enter Details

- Complete all the required fields.
- Ensure the location details are entered correctly. If not, it may appear as not being submitted or be stored in another site's files.
- Once submitted all the people on the distribution list will receive an email notification of the incident.
- You can add another person into the distribution list if required.

Assign Investiagtors

- On the Incident Page go to the status column and click on "Awaiting Assignment".
- This will take you to the page where the people on the distribution list will be seen.
- Unless it is a major incident, remove Kathy Grieve and your Consultant. You may also wish to remove the Principal. You can add other investigators if required.
- Once the "Send Notification" is clicked an email will be sent informing those selected that they will be investigating the incident.

Complete Investigation Details

- Ensure the investigation **starts within 24hrs** of the incident being reported.
- On the Incident Page go to the status column and click on "Waiting Investigation". This will take you to the Investigate Page. Complete all the required fields.
- In the "Corrective Action" box enter what needs to be done, not what has been done.
- Always leave the Corrective Action Status **OPEN**.
- Once the investigation is finished an email will be sent to the distribution list informing that the investigation is finished.

Approving the Corrective Actions

- On the Incident Page go to the status column and click on "Investigating Waiting For Approval". This will take you to the Investigation Search Page.
- The 5 tabs will be greyed out.
- Click on the small circle on the left and 4 of the tabs will turn blue.
- Click on the "Approve Tab" and an email will be sent to those responsible for dealing with the Corrective Actions.

Completing the Progress notes for the Corrective Actions

- On the Incident Page go to the status column and click on "Awaiting Corrective Actions". This will take you to the Corrective Actions Page.
- The "Close and Progress Notes" Tabs will be greyed out.
- Click on the small circle to the left and both tabs will turn blue.
- If there is more than one action required open the "Progress Notes" tab and enter the information.
- When the final step is completed or there is only one step required click on the "Close Tab" and enter the information. Once saved the corrective action will be closed.

Close the Incident

- On the Incident Page go to the status column where it will say "Corrective Actions Complete".
- Click on the small circle on the left and the "Close Tab" will turn blue.
- Click the "Close Tab" and you will see the status column will be updated with "Closed" and the date in brackets.