SAFETYSUITE CLOUD

Long Guide – Report a Confidential Incident

Report all safety incidents in SafetySuite. A safety incident is any event, including a near-miss situation, which has caused, or has the potential to cause injury or illness. Incidents fall into three categories: hazard, near miss, and injury/illness.

Hazard

A hazard is a situation or an object that has the potential to harm a person.

Near Miss

A near miss is where an incident occurs but no injury, illness or damage is sustained.

Injury/Illness

Injury/illness is any occurrence which resulted in an injury or illness.

Reporting a confidential incident

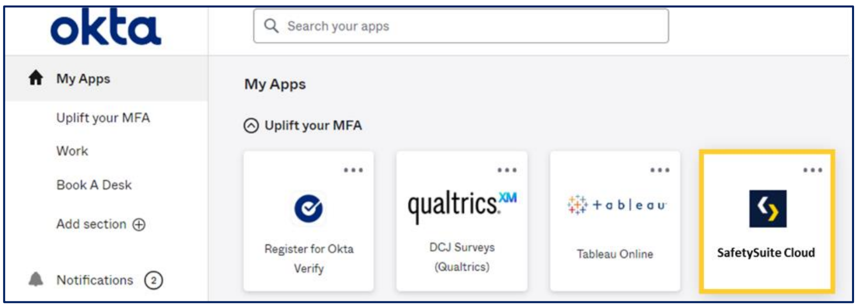
A Confidential Report will **bypass your line manager**. It is an incident or situation that requires action or investigation outside of your normal reporting structure.

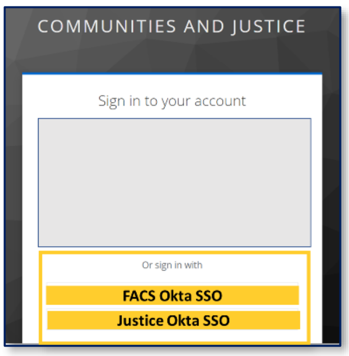
Let's meet Marc. Marc started working with a new team at DCJ a few months ago. He believes his new manager and one of his colleagues are ridiculing his skills and he is worried about delivering on his work every day. Constant challenges are making him question his abilities. This has spiralled into further problems affecting his physical health and mental wellbeing. Marc wants to report this incident confidentially so that someone other than his manager can investigate the incident and determine what steps need to be taken.

Let's go through the steps to report this confidential incident in SafetySuite.

STEP 1: Access your SafetySuite

- Find SafetySuite Cloud via **Okta (Justice or FACS Okta)** or **Citrix (FACS).**
- Then, simply double click the **SafetySuite Cloud tile.**
- Finally, click on sign in with **Justice Okta SSO** or **FACS Okta SSO** as applicable for you. You won't need to type an email address or password.

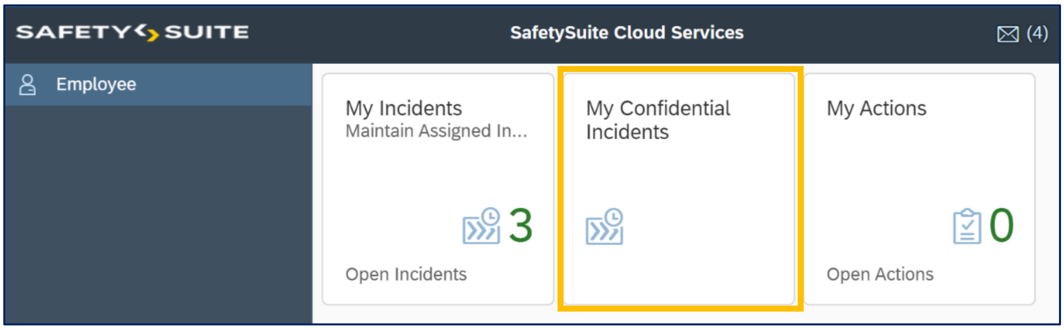




STEP 2: Select the My Confidential Incidents tile from your Employee page

From your SafetySuite homepage, click on ***SafetySuite - Employee***. Here you see three tiles:

1. My Incidents 2. My Confidential Incident 3. My Actions

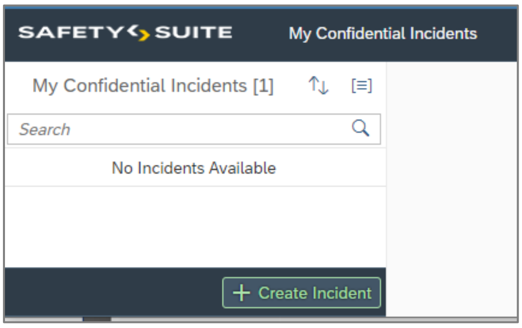


***My Confidential Incident* tile**: Sometimes, information about your incident is sensitive and needs to be investigated outside of your normal reporting structure (for example – when reporting a bullying or harassment incident). Use the *My Confidential Incident* tile to report this type of incident. This ensures your incident is investigated by a Safety Lead (WHS Project Officer/Safety Officer), NOT your manager/leave approver.

NOTE: Don't use this tile if the incident does not need to bypass your manager.

STEP 3: Create Incident

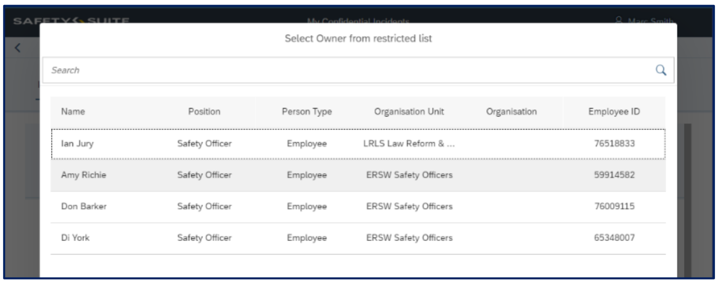
Click on the *My Confidential Incidents* tile then click + *Create* icon at the bottom left.



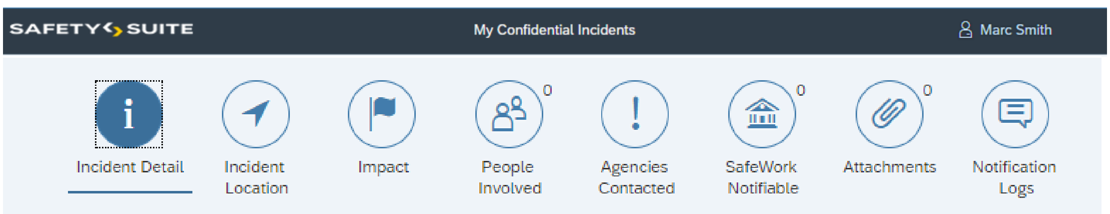
This opens a new incident page.

As you have selected a Confidential incident, this will bypass your manager. You will instead be asked to select who should investigate your incident.

Your manager <u>will not appear</u> as a choice, you will instead be presented with a Safety Lead (WHS Project Officer/Safety Officer) in your area. If there is more than one person, select the most appropriate. You don't need to be familiar with your chosen investigation leader. If they are not the best fit for your case, they will contact you to determine the best person to follow up the investigation. For example: Marc will select Amy Richie from the list presented.



At the top of the new confidential incident page, there's a ribbon containing eight icons. As you click on an icon, it gets highlighted, and that relevant screen opens for you.

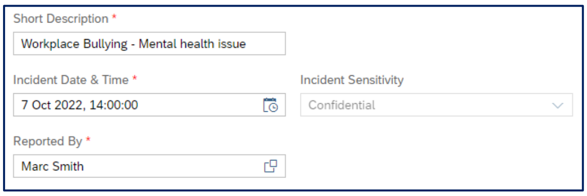


TIP: If you need help on any screen, click on the *Question Mark* icon (*?*) at the top right corner.

TIP: To go back to your home page simply click the SafetySuite logo.

STEP 4: Confidential Incident Detail

Enter details for all fields marked with a red star. If you miss entering an essential detail, a red bar will highlight what you have missed.



Short Description: Provide a short description of the incident. This field has a limit of 40 characters. For Marc's example: *Workplace Bullying - Mental health issue*

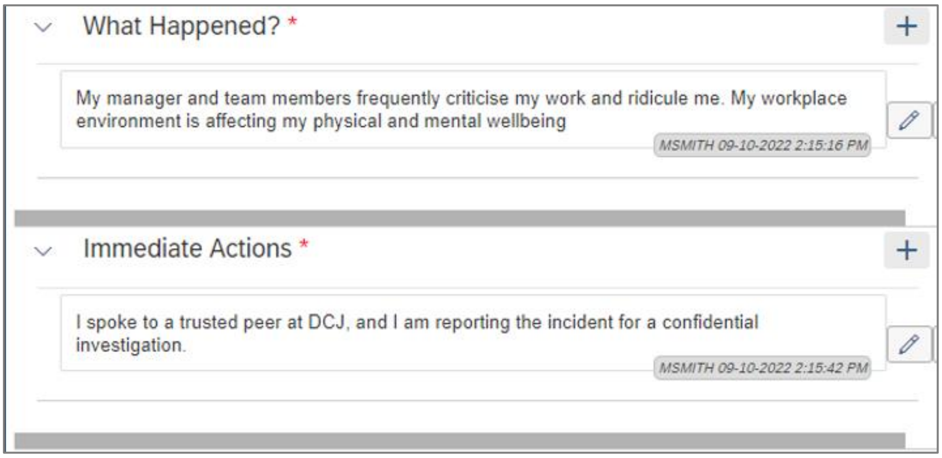
Incident Date and Time: Use the calendar to report the time and date the incident occurred. For Marc's example, he will put down the most recent incident which resulted in him feeling unwell.

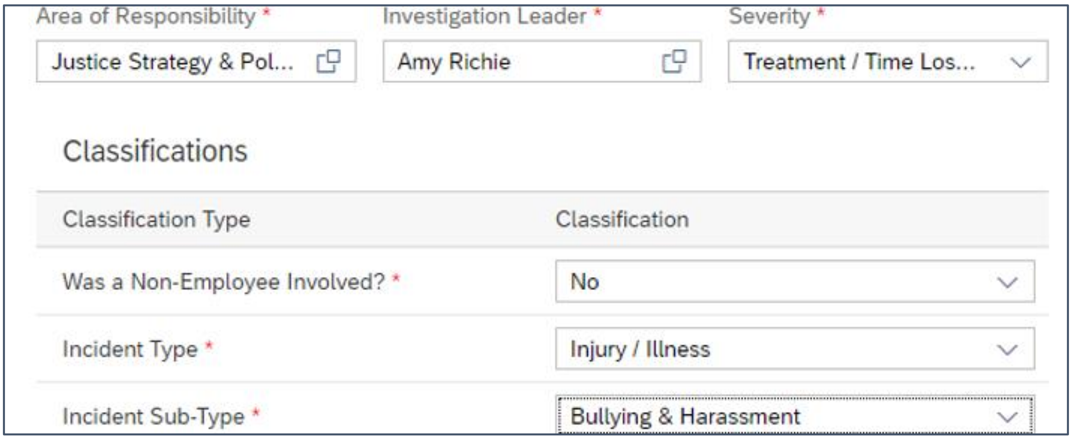
Reported By: When you create an incident in SafetySuite, your name automatically appears in this field. If reporting a confidential incident on behalf of someone else, it's important to change this field to their name so they have the record and notification of their confidential incident. You can clear the field and type a person's name and options appear for you to select. Note: changing the Reported By Person's name will present a new list of Safety Leads (WHS Project Officer/Safety Officer) to choose from depending on the change.

Incident Sensitivity: Defaults to Confidential and cannot be changed. If you didn't mean to create a confidential incident, simply discard this incident (you can click the SafetySuite logo at the top left of the screen) to return to your homepage then click *My Incidents* Tile to create a standard incident for your manager to investigate.

What Happened: Click on the + sign on the right-hand side of the page. A text box appears. Describe in detail what happened. For Marc's example: *My manager and team members frequently criticise my work and ridicule me. My workplace environment is affecting my physical and mental wellbeing*. Then click 'Accept' to save changes.

Immediate Actions: Click on the + sign on the right-hand side of page. A text box appears. Enter the immediate actions that were taken. For Marc's example: *I spoke to a trusted peer at DCJ, and I am reporting the incident for a confidential investigation.* Then click 'Accept' to save changes.





Area of Responsibility: Defaults to the organisation unit of the *Reported By* employee. For this example Marc should see his area of responsibility here (*Justice Strategy and Planning*).

If this field does not represent the organisation unit where the incident happened, shows an incorrect organisation unit, or is blank, then you must choose the relevant area of responsibility where the confidential incident happened. This ensures the incident workflows to the correct Safety Lead (WHS Project Officer/Safety Officer)to investigate.

There are two ways to change Area of Responsibility:

1. If you know the exact area, start typing the required area name directly into the 'Area of Responsibility' field and a list with matches is displayed, OR
2. Click on the *double squares* to initiate a search. You'll see the original Area of Responsibility displayed. You may need to expand the view - click on the '>' symbols - to find the area you want (this could be 'lower' or 'higher' than the initial area displayed)

When you change *Area of Responsibility*, you are presented with a new list of Safety Leads (Investigation leader) for that area to be recalcuated. Review the names and click on the desired person.

Investigation Leader: Shows as the person you selected to investigate your incident in Step 2.

Severity: This field is mandatory. For this field select:

- *Notification only* for a minor injury for which no medical treatment costs were incurred and no time was lost from work and when you don't want to report this injury as a compensable injury.
- *Treatment/Time Lost (Workers Comp)* when you incurred medical treatment costs and/or lost time and you want to report this as a compensable injury.

Marc lost time from work and wants to report a compensable injury. He selects *Treatment/Time Lost (Workers Comp)*.

Classification Type

Was a Non-Employee Involved: Select *No for this example*

Incident Type: Example: *Injury/illness.*

Incident Sub-Type: Select from the drop-down. For this example select *Bullying & harassment.*

Now select the Incident Location tab.

STEP 5: Incident *Location* screen

Location Type: Select from the drop-down menu. For example: *Workplace*

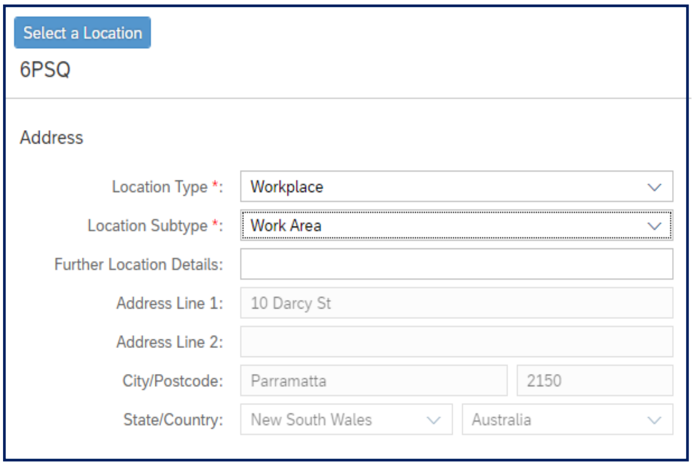
Location Sub-type: Select from the drop down menu. For example: *Work Area*.

Further Location details: Optional field to add more information or further details about where the incident occcurred, if relevant.

Address: Populates automatically based on *Reported By* employee's organisation unit.

To change it, for example if the incident happened outside the employee's usual workplace, click on the blue **'Select a Location'** button.

Search for a location by typing in characters and any matching addresses will be listed or if you cannot find the address, select '*Add a new Location*; to create a new location.



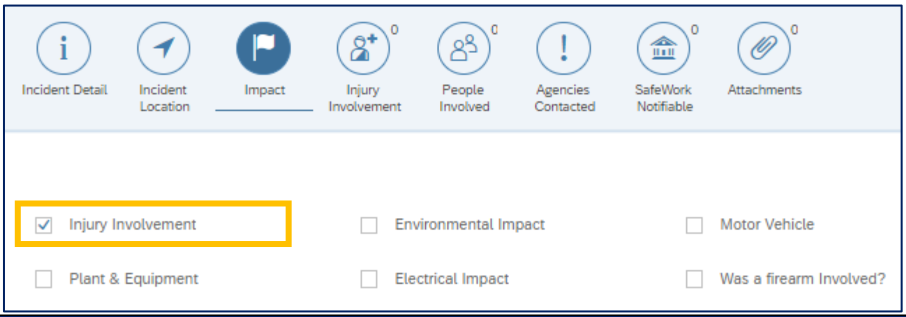
Working from home?

For incidents that occur in an employee's home, select Location Type – **Offsite** and Location Sub-type **Home/House**. **You do not need to provide the home address**.

STEP 6: Impact Screen

Because Marc is reporting an illness (example: mental health issue), he must click the *Impact* icon to launch the *Impact* screen and check the *Injury Involvement* checkbox.

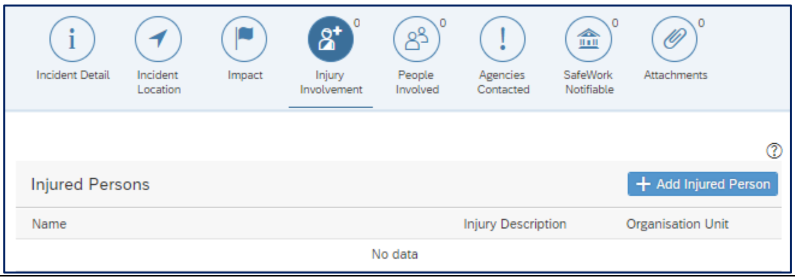
Then, click on the new *Injury Involvement* icon that now appears on the ribbon and then click on *Add New Injury*.



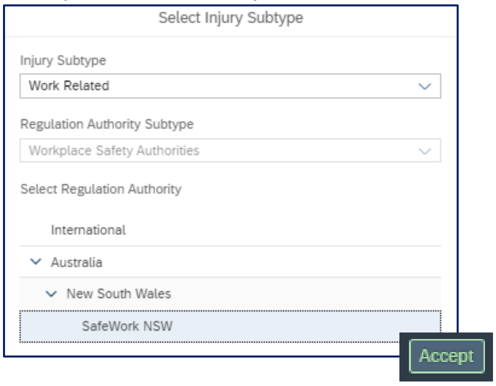
STEP 7: Injury Involvement

In this tab, you must add the injured person. Click +Add Injured Person button. As you begin to type in a name, the field will provide options. Select the correct person and accept - in this example it is Marc.

An injury Subtype box appears.



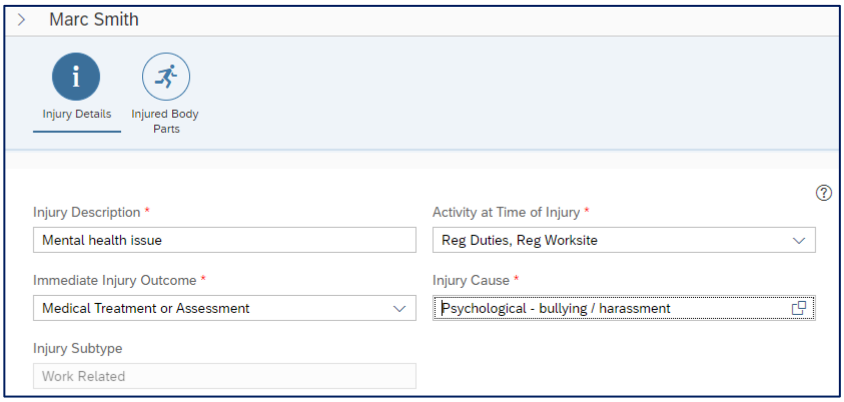
Injury Subtype: You will see *Work Related* and *Non Work Related* options in the dropdown box.



Regulation Authority Subtype: Use the arrows to select Australia – New South Wales – SafeWork NSW and click Accept.

You are then directed to complete an *Injury Details* page which is mandatory.

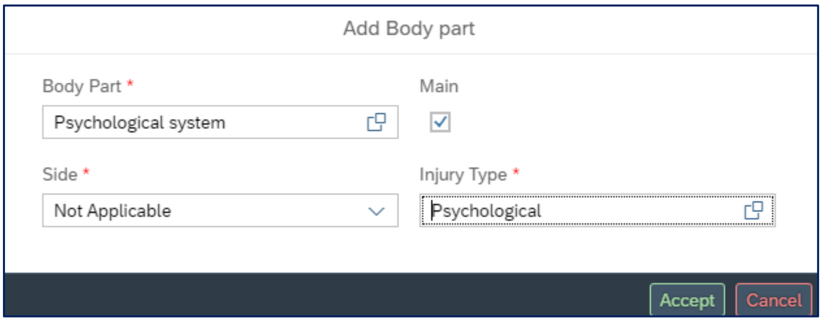
Injury Description: Type in the description. For example: *Mental health issue*



Activity at Time of Injury: Click on the down arrow to show a list of options. For example: regular worksite and performing regular duties.

Immediate Injury Outcome: Click on the down arrow to show a list of injury outcomes. For example: *Medical Treatment or Assessment*.

Injury Cause: Click on the double squares to the right and a list of mechanisms will appear. From the list, select the appropriate cause. For example: *Psychological – bullying/harassment*



Now select ***Injured Body Parts*** tab to add a body part.

Body Part: Select the most appropriate body part or click on the *double squares* to select from a range of options.

Then select the side (if applicable) and injury type. If multiple body parts were injured, add all parts, but check the main box for the body part that is injured the most. For example: Marc experienced a *psychological system issue.*

Injury Type: Select from a list of options outlining injuries. Marc will select *Psychological* and **Accept**

Note: at any point you can save your work by selecting 'Save Injury'. This information remains in your draft incidents for further editing if required. Note that 'Saving' does not submit the incident to the nominated investigation lead

Step 8: Record People Involved (optional step)

Marc's name defaults here as he was added as an injured person in Step 6.

Select + *Add Involved Person* to add other people involved for example a witness.

To add an employee, select **Person Type – Employee.**

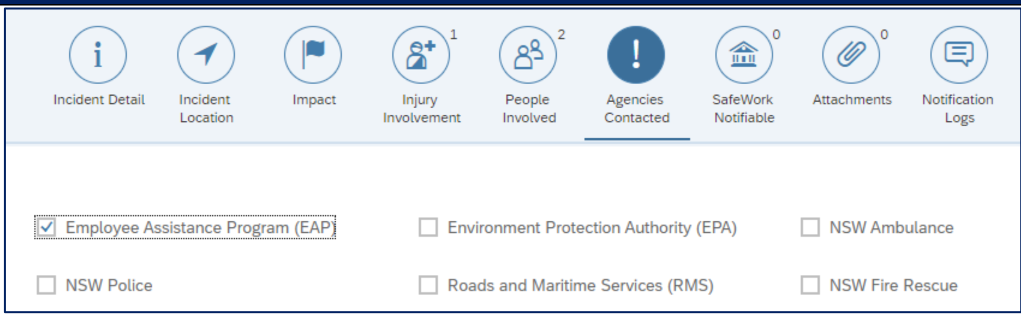
Start typing the required name directly into the Person involved field and a list of matches displays

OR

Click on the double squares which opens a search box and enter the information. For example: Marc has added his manager Max here as he is involved in the incident Marc is reporting.

To add a **Non-Employee** refer to the **Guide - Report an incident for a non-employee**

Step 9: Agencies Contacted (Optional Step)



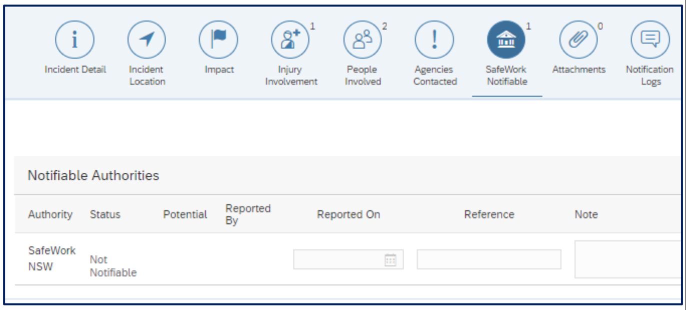
If you have contacted any agency for assistance, check the relevant agancy. Example: Marc has checked *Employee Assistance Program.* Note: This information is for reporting purposes only. It does not trigger a notification to agencies.

STEP 10: SafeWork Notifiable (Optional Step)

This section is optional. You are not required to complete it.

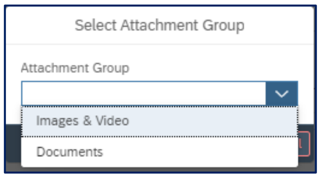
This section is important for managers /investigation leaders to record in SafetySuite during the investigation

A notifiable incident is an incident that results in a death, serious injury, or serious illness of a person or involves a dangerous incident which is reportable to SafeWork NSW.



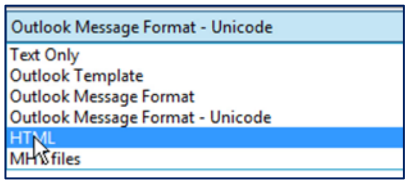
STEP 11: Attachments (Optional Step)

You can attach any document, photos and even emails.



First, save the document or images/video on your computer. Then in SafetySuite, click on the *+Add Attachment* button, select attachment group - *Images & Video* or *Document* and click Accept.

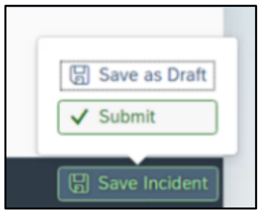
You see your folders - find your saved document/Image and upload it. Acceptable formats include Excel, Word, PDF, JPG, HTML Files.



Attach emails: First open the email in Outlook. Then click on *File* and click on *Save As* and change its format from Outlook Message Format to an HTML file. You must make sure you save it as an HTML file before you upload.

STEP 12: Submit the Incident

Click on *Save Incident* button at the bottom right.



Then, click the *Submit* button to submit this incident or click on *Save as Draft* button, if you need to gather more information.

If you have missed entering an essential detail, SafetySuite will highlight which details you need to provide so you can submit the incident.

After you click Submit, wait until the incident appears on the left side of the screen.

Once an incident is submitted, the *Investigation Leader* (in this Confidential case, WHS officer Amy Richie) will be notified automatically and the *Reported By* employee will receive an email confirming their submission with an Incident Number.

For Marc's example, he will see his confidential incident incident in SafetySuite as Open

This means Marc can edit this incident until its investigation begins. After the investigation starts, he will have read-only access to this incident.

After you have submitted the confidential incident, you can also see all the notifications that have been triggered for your information.

This brings us to the end of this guide. Thank you!