

MANAGING REPORTS

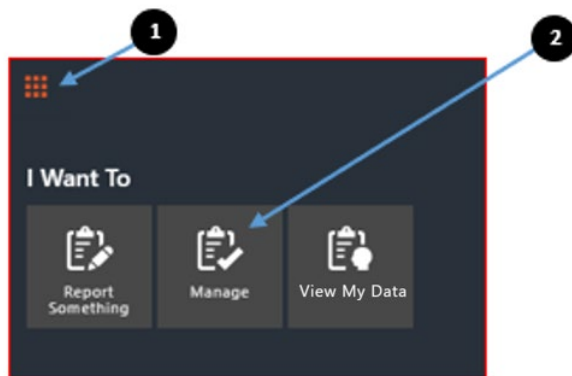
This guide outlines the process of managing reports: These can be a hazard, a near miss or an injury reported by either employees or student in AIMS. All reports are assigned to a responsible person to review and manage, this is done by completing a Management Plan in AIMS. The Management Plan is used to assess the report, identify, and implement appropriate controls to remove or mitigate the risk, and assign actions to relevant staff.

This section demonstrates the step-by-step process of managing any health and safety report.

1.1 Managing an Incident

1.1.1 Access the Management Plan

You can click on the link in the email notification to navigate to the report, or login into AIMS and click on the **Menu button ①** in the top left corner to select '**Manage**' **②**.



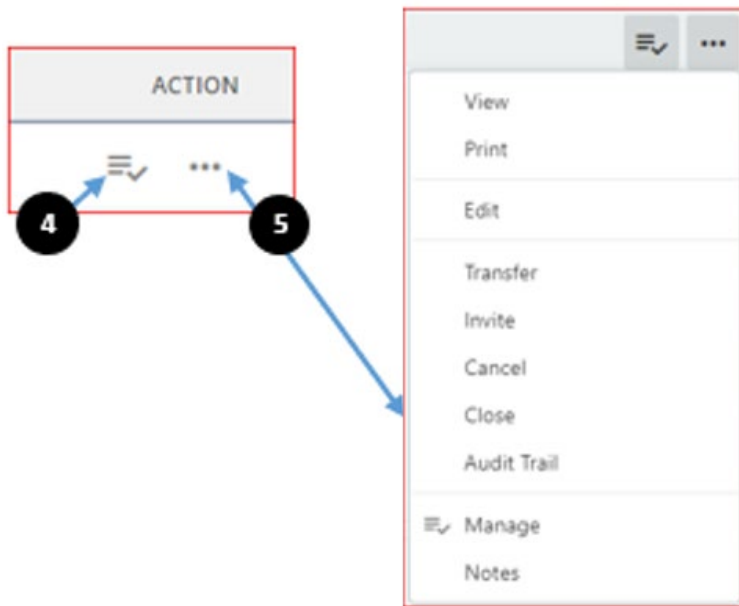
This will take you to the **Manage Register**.

ID	TYPE	STATUS	LOGGED DATE	LOCATION	TITLE	CREATED BY PE...
112161	Incident	NEW	2/04/2020 9:39 am	Glen Waverely	WY 20...	Mary
112160	Incident	NEW	2/04/2020 9:33 am	Glen Waverely	WY te...	Mary
112136	Hazard	NEW	31/03/2020 2:51 pm	Glen Waverely	WY br...	Mary

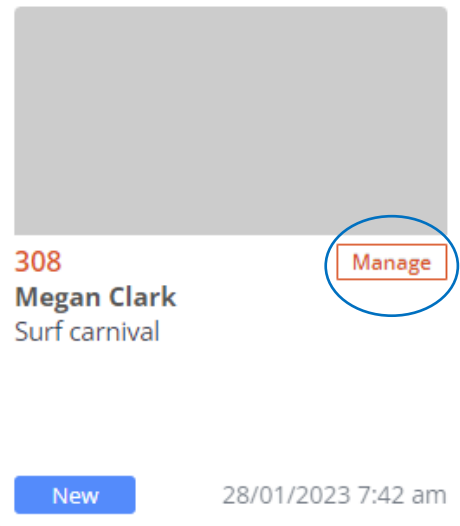
You can find a specific incident that you wish to manage by scrolling up and down the list or selecting any column header to sort within the column. Alternatively, you can use the **search bar ③** to search for an incident using a keyword or incident report ID.

Once you have found the incident you wish to manage, scroll to the '**Action**' column on the far-right side of the table. The '**Action**' column will have two icons.

- The '**Manage**' shortcut **④** will take you directly to the **Management Plan**.
- Clicking on the '...' icon **⑤** will display a drop-down list of actions available to you, including the '**Manage**' function. Use either method to go to the Management Plan.

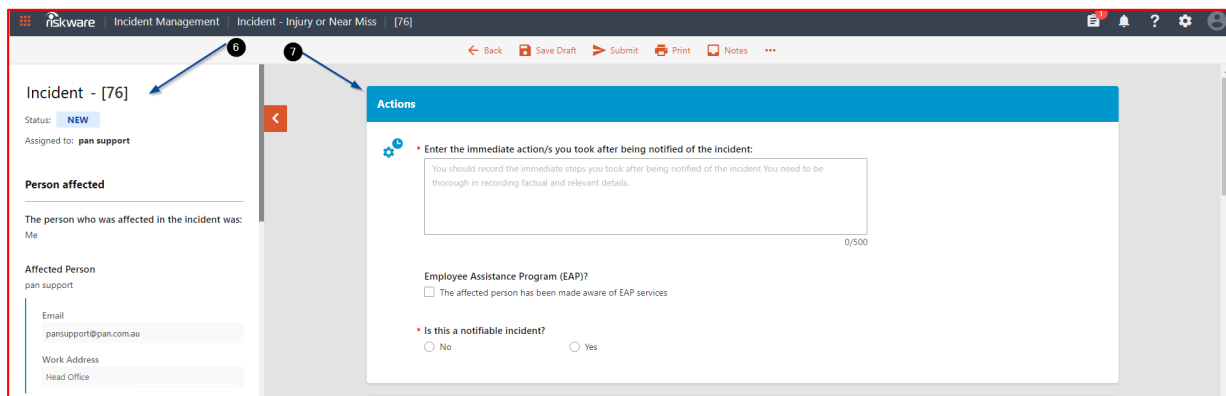


If you are using the Tile view, click on **'Manage'**.



1.1.2 Complete the Management Plan

In the Management Plan, you will see the original incident report on the left side of the screen **6**. On the right hand side, you will see the management plan that needs to be completed **7**.



Before taking any action, you should check the details in the report are accurate, in consultation with affected people, and if needed, note any additional information, detail, or make corrections.

Notes can be added to a report by clicking on the **'Notes'** icon at the top of the screen.

You can also reassign management of the report to another person, by clicking on the three dots at the top of the screen and selecting **'Transfer'**: Search for the person's name and add a note that will appear in their notification email, click **'Transfer'** at the bottom of the sub form.

1.1.2.1 STEP 1 – Immediate Actions Taken

In the first free text field record any actions taken so far and by who.

Next you will need to evaluate the level of risk at the time the incident occurred, by selecting the corresponding **'Likelihood'** and **'Consequence'** from the drop-down menus. The resulting risk rating will appear in the box on the right.

1.1.2.2 STEP 2 - Creating an action plan and assigning tasks

Click on the **+Add** ⑨ button or **'task widget'** ⑧ to open the Action Plan sub form, where you will create tasks/actions and assign them to someone to complete employees within your organisation to complete.

Control Measure	Description	Assigned to	Due Date	Status	Progress	...
Select + Add button to enter details						

⑧ →

⑨ → + Add

The **'Add an action to the plan'** section will now be displayed.

- Select the relevant **action or control measure** ⑩.
- Enter a **description** ⑪ of the task using free text. This description will be viewed by the person allocated to the task. The person allocated to the task will also have access to the original incident report, so avoid duplication of information.
- To allocate the task to a staff member, begin typing their name into the **person responsible** ⑫ field. Alternatively you can press Enter on your keyboard to search and scroll down the list of staff names.
- Enter the target completion date by clicking the on the **date picker** ⑬ and selecting a **future date**. You can select the relevant date from the drop-down calendar view or alternatively use your keyboard to update the date in DD/MM/YYYY format.
- Click the **'Add'** button at the bottom of the page to complete this section.

Add an action to the plan - (New)

Action Plan

- * Select the action or control measure
 - 1. Elimination
 - 2. Substitution
 - 3. Engineering / Isolation
 - 4. Administrative Controls
 - 6. Personal Protective Equipment (PPE)
- * Describe the task

Clearly describe the task so that the person responsible understands what needs to be done.
- * Select who is responsible

Select a Person
- * Enter the target completion date

Select date

Add

The action details will now be populated in the table. You can click the ‘...’ icon to edit or delete this entry.

Control Measure	Description	Assigned to	Due Date	Status	Progress	...
4. Administrative Controls	Monthly audit	pan support	21/04/2021	To Do	0	...

14
+ Add



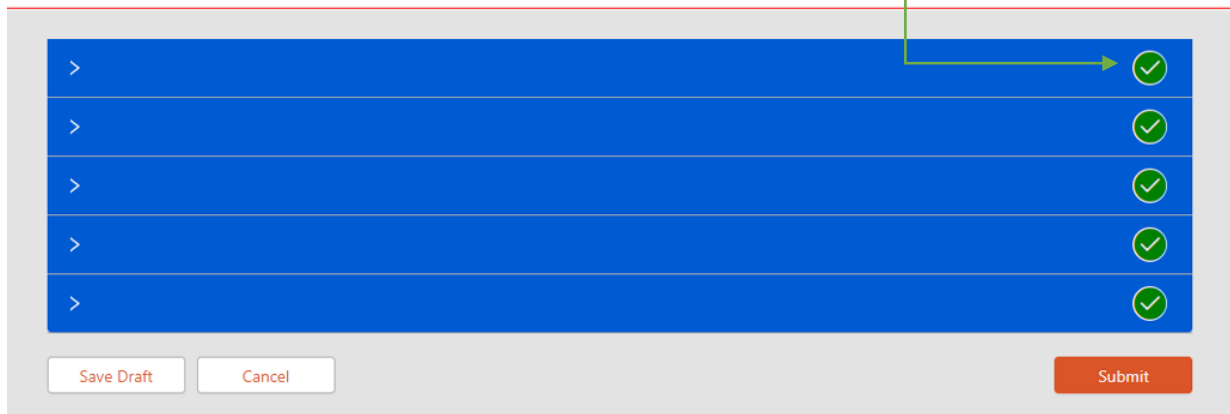
You may enter multiple actions. Click ‘+ Add’ to add more actions.



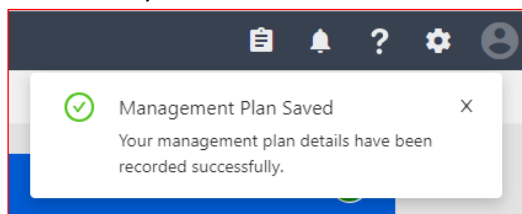
If you have assigned an action to a staff member, they will receive a notification and have access to the task details. The assignee will also have access to the original incident report and the management plan.

NOTE: No tasks are allocated until the Management Plan has been submitted. Adding them to the table does not initiate the task.

Submit - The Management Plan is ready to submit when all relevant sections are complete. Click the **'Submit'** button at the bottom of the page.



A message will appear in the top right of the screen indicating the Management Plan has been successfully submitted.



The status of the incident in the Register will now be **'Open'**.

112160	Injury & Near Miss	OPEN
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You can update the Management Plan after submitting. Simply navigate back to the Management Plan and make changes. Click the **'Update'** button at the bottom of the page to save.

Closing incident reports

Automatic closure

The incident status will remain **'Open'** until the actions have been marked as complete by the assigned staff.

Once all actions have been marked as complete, the incident status updates automatically from Open to **Closed**.

The status of this incident in the register will now be **'Closed'**.

ID	TYPE	STATUS ↑
30087	Injury & Near Miss	CLOSED

Updated 25/08/2023