Reviewing an Incident & Assigning Investigations

Reviewing the Incident Report

As an admin, you have read-only access to all incident reports submitted in your organization.

1. Select the incident report link from the notification email or
2. Log in to https://app.riskandsafety.com/ with your credentials
3. Select **Programs** from the top menu
4. Select **Overview** beneath "Workplace Violence Prevention"
5. Search for a specific report or refine the results using the filters and column headers
   Reports can have the following statuses:
   - Draft – a reporter is in the process of filling out the incident report
   - Under Review – an incident report was completed and needs to be reviewed
   - Under Investigation – a report was assigned to an investigator
   - Investigation Complete – the assigned investigator completed their investigation
   - Complete – all reviews, including the investigation, are complete
6. Select a report with status "Under Review"
7. Review the report and decide if it needs an investigation or a hazard evaluation
   - To start an investigation, go to the next section “Investigations & Hazard Evaluations”
8. If an investigation is not required, select **Complete Report** in the upper right corner

Withdrawing an Investigator

If an investigator needs to be removed, this can be done if the investigation & report do not have “Complete” statuses. Withdraw an investigator with the following steps:

1. From the report, select **View** to the right of the person's name in the investigation section
2. Select the three-dot menu in the upper-right corner of the investigation
3. Select **Withdraw**
4. Review the confirmation message and select **Withdraw**

Note: The person's name will remain on the report with a "Withdrawn" status.

Completing the Incident Report

1. From the **Overview** screen, select a report with status **Investigation Complete** or **Under Review**.
2. Review all the information in the incident and investigation reports.
3. When ready, select **Complete Report**
    - The Incident report status at the top of the report will change to **Complete** status
4. Select **Close** at the top right of the page to return to the incident report list page

Analytics

Program Admins have access to view analytics, export reports, and save Excel/CSV files.

1. From the **Overview** screen, choose **Data Explorer** in the left column
2. Choose the data source
3. The data shown in the table shows all datapoints available for the data source. Move columns left and right by selecting the filter icon (three horizontal lines) and dragging the column
4. To hide a column, choose the **Columns** sidebar and uncheck the box for the column you wish to hide
5. To save the view for viewing again at a later date, choose **Save Grid State**
6. Export the report using either the **CSV Export** or **Excel Export** buttons