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

Investigations & Hazard Evaluations

To initiate an investigation or hazard evaluation of the incident, investigators must be assigned.

1. At the top of the incident report, select **Add Investigator** for either one or both investigation types
2. Enter the name or email address of the investigator in the search field
3. Select the investigator’s name and email from the search results
4. Select **Assign**
5. Once assigned, the status of the incident report will change to **Under Investigation** and the investigator will receive a confirmation email
6. For reports with more than one investigator, all investigations must be completed for the report to move forward

7. Investigations & Evaluations can have the following statuses:
    - Assigned – an Investigator has been assigned an incident report
    - In Progress – an investigator is in the process of filling out the incident report
    - Complete – the assigned investigator completed their investigation
    - Withdrawn – the investigator was removed from the report (in case of assignment error or absence etc.)

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