

QUICK REFERENCE GUIDE – PROGRESSING A CLOSE CALL TO CLOSURE

Introduction

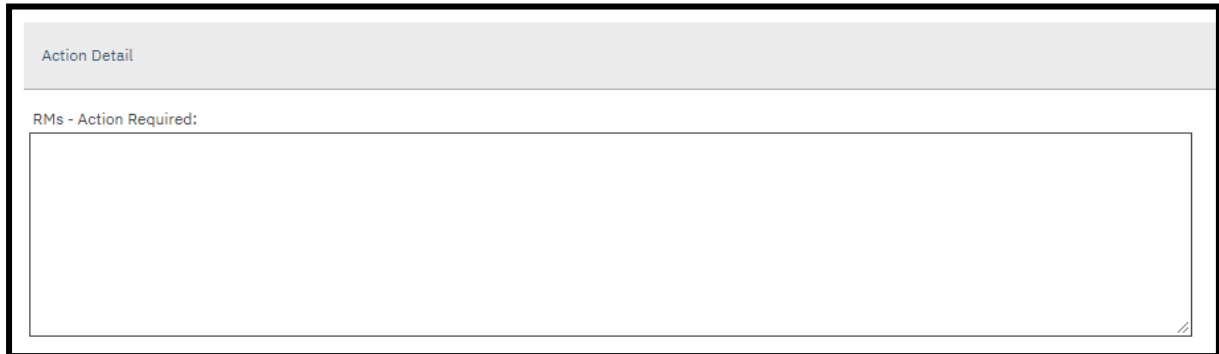
This section is to be completed by the RM to enable them to describe what has been done about the close call and to record completion dates etc.

The **Responsible Managers Detail** and **Life Saving Rules** tabs can be accessed near the bottom of the Close Call report screen

The screenshot shows a web-based form for reporting a close call. At the top, there are fields for 'Close Call ID: 374925', 'Reported Date: 08/03/2019 09:41', 'Organisation: NR', and 'Status: W-RM'. Below this are fields for 'Reporters Email', 'Network Rail Period: 201813', and 'Reported By'. The main section is titled 'Event' and contains a rich text editor for describing the incident. Below the editor is a field for 'What were you able to do about it:' with the text 'No action taken, reported to Kaitbray line manager'. There are also checkboxes for 'Are you reporting this as a result of a Safety Conversation?' and 'Was the Close Call logged as a result of a workplace safety inspection?'. The bottom of the screen features a navigation bar with four tabs: 'Additional Detail', 'Organisation Specific Detail', 'Responsible Managers Detail', and 'Life Saving Rules'. The 'Responsible Managers Detail' and 'Life Saving Rules' tabs are highlighted with a yellow box and a yellow arrow pointing to them from the text above.

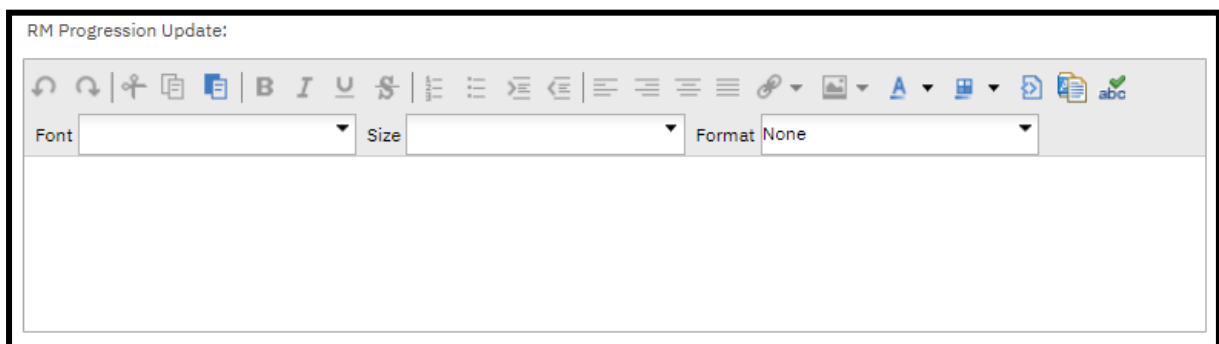
Providing Progression Update(s) on a Close Call

Within the RM details tab, when a close call is accepted by a RM, they will be required to populate the **'RMs - Actions Required'** field in the **Responsible Manager Detail** tab. This field can be updated if additional actions are required or the initial action required has been modified.



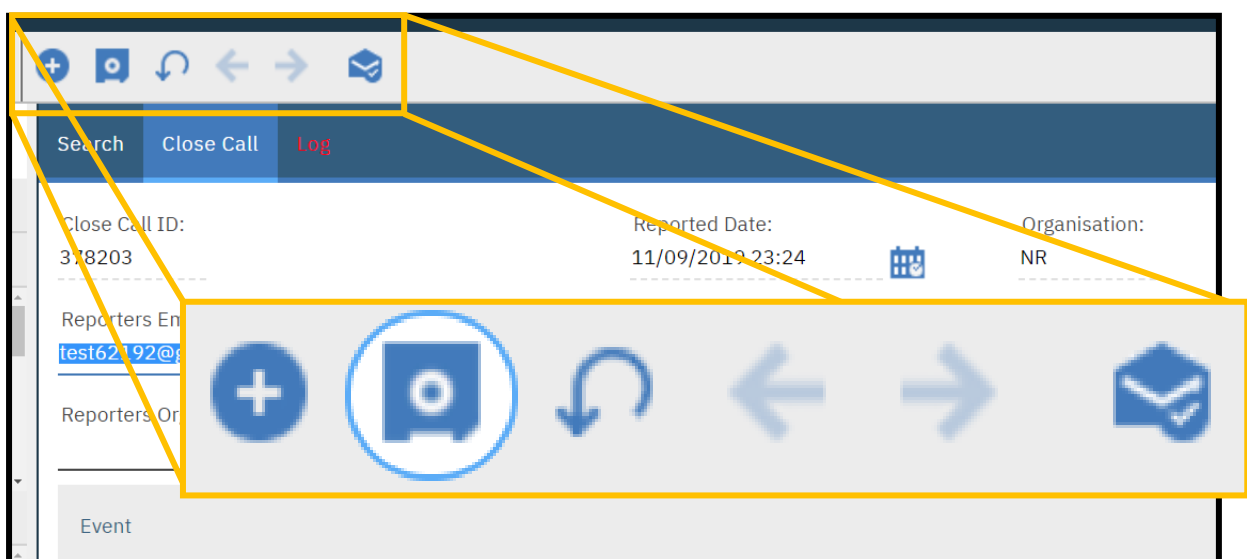
The screenshot shows a web interface with a header 'Action Detail'. Below it is a large, empty text area labeled 'RMs - Action Required:'. The text area is outlined with a thin border and has a small cursor icon in the bottom right corner.

The RM can provide an update to the Close Call reporter on how the action outlined in the action required field is progressing. This is entered in the **RM Progression Update** field



The screenshot shows a web interface with a header 'RM Progression Update:'. Below it is a rich text editor toolbar with various icons for undo, redo, bold, italic, underline, strikethrough, bulleted list, numbered list, indent, outdent, link, unlink, image, text color, background color, table, insert, and save. Below the toolbar are three dropdown menus: 'Font', 'Size', and 'Format' (set to 'None'). Below the dropdowns is a large, empty text area for entering the update.

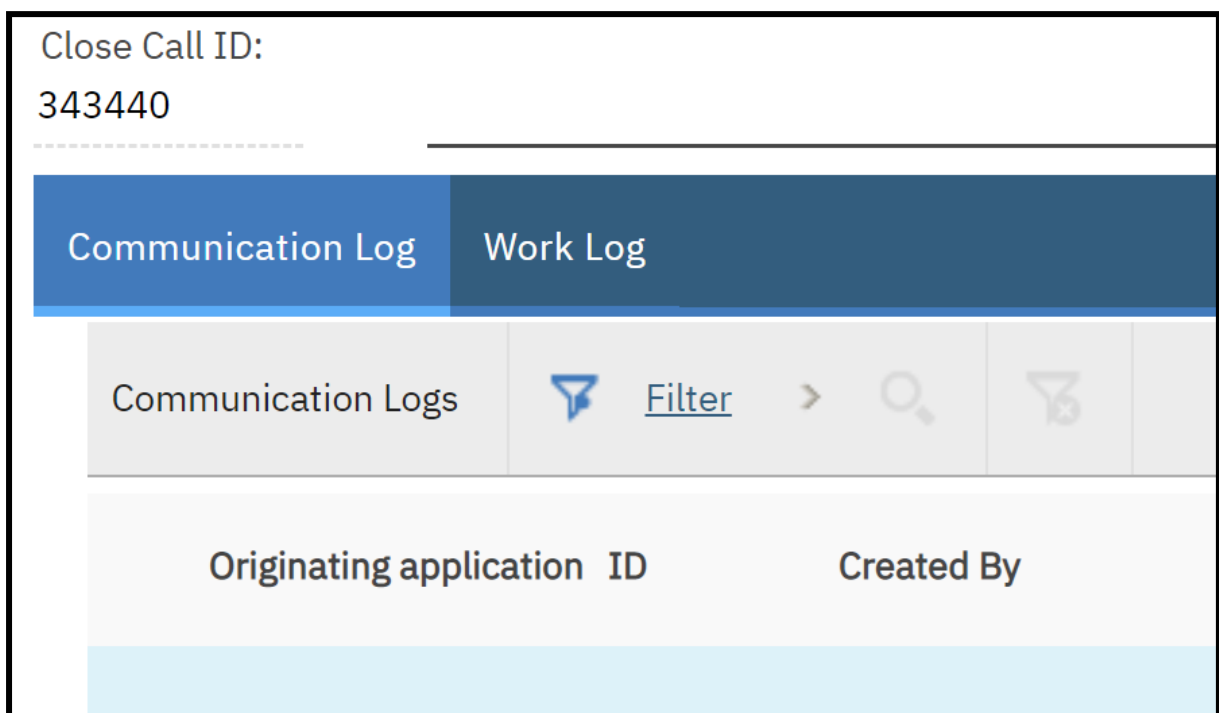
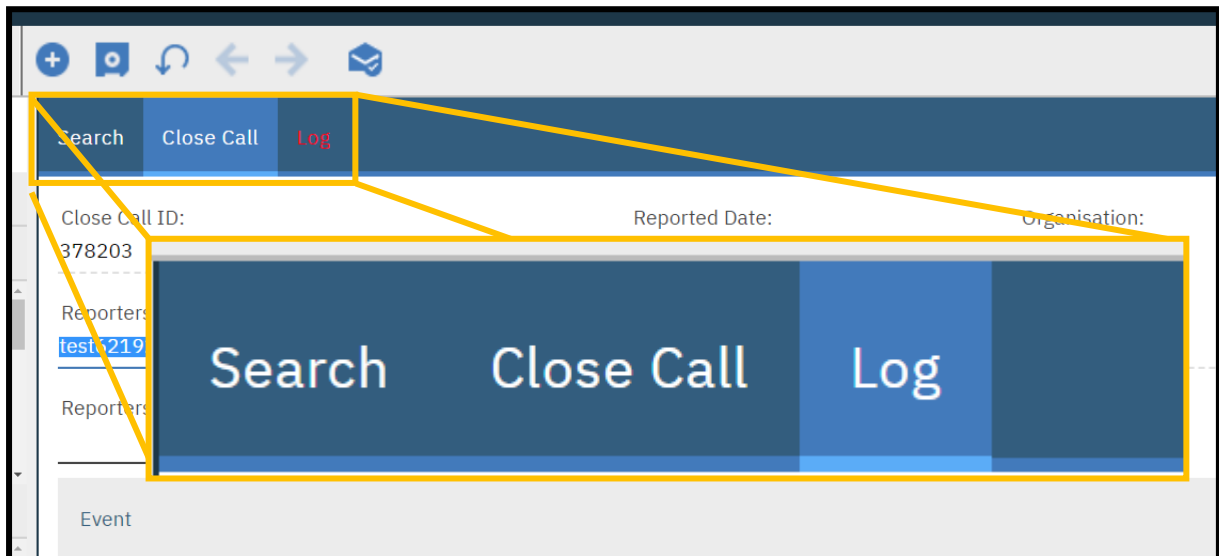
When this field is updated, the RM will be required to select the Save icon to ensure their new note is saved and a notification via email and text message are sent to the close call reporter.



The screenshot shows a web interface for a 'Close Call' page. The page has a navigation bar with 'Search', 'Close Call', and 'Log' tabs. Below the navigation bar, there are fields for 'Close Call ID: 378203', 'Reported Date: 11/09/2019 23:24', and 'Organisation: NR'. Below these fields, there are fields for 'Reporters Email' (test62192@) and 'Reporters Or'. At the bottom, there is an 'Event' field. A yellow box highlights a toolbar with icons for '+', a speech bubble, a refresh icon, a left arrow, a right arrow, and a checkmark icon. The checkmark icon is highlighted with a blue circle.

Once the RM has saved an update, they will be able to add additional notes right away.

Whenever an update is provided, the work log will be updated to show all the updates that have been provided by the RM. This information will also be accessible via the Communication Log which shows the emails and notifications sent.

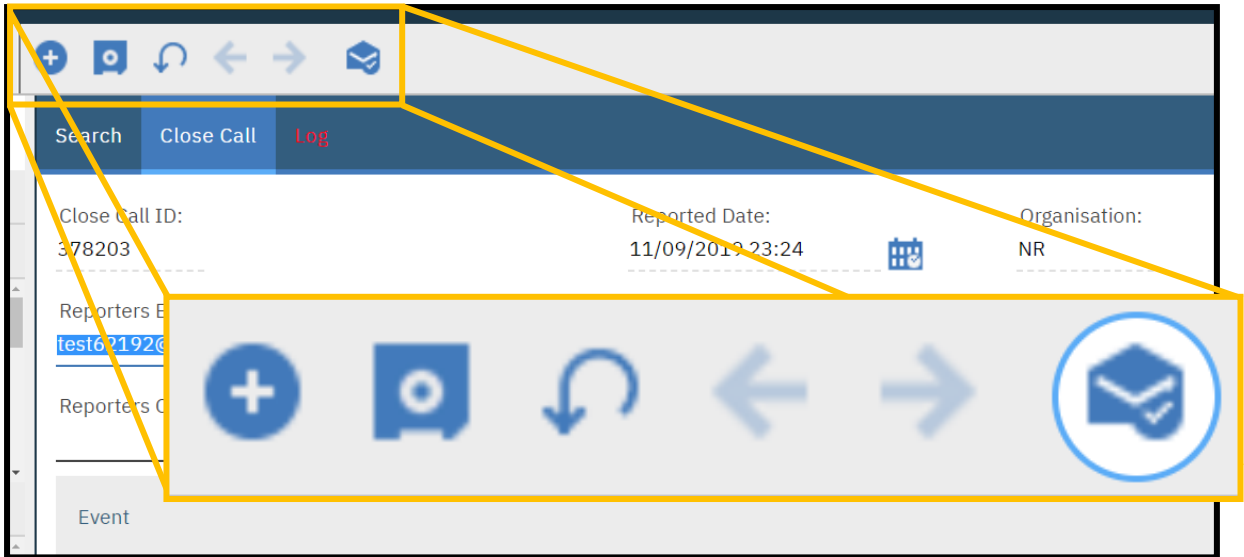


The screenshot shows a 'Work Logs' table with the following data:

Record	Class	Created By	Date	Type	Summary	Viewable?
> 377817	> SR	ADRIAN.JONES@RSSB.CO.UK	11/07/2019 07:39	UPDATE	RM progression update	<input type="checkbox"/>

Progress the Close Call to the Assurance Manager for review

When the RM is ready to close out the close call (having completed their full review and checking the details/categories) before processing to close out a Close Call for an Assurance Manager, Click on the process icon on the top menu bar.



The *Manual Input* popup will appear, where the RM can either close or cancel the close call event. To move the close call onto the AM, click Close this Close Call event and then click OK.

Manual Input

Close this Close Call event

Cancel the Close Call Event

Memo:

OK Cancel