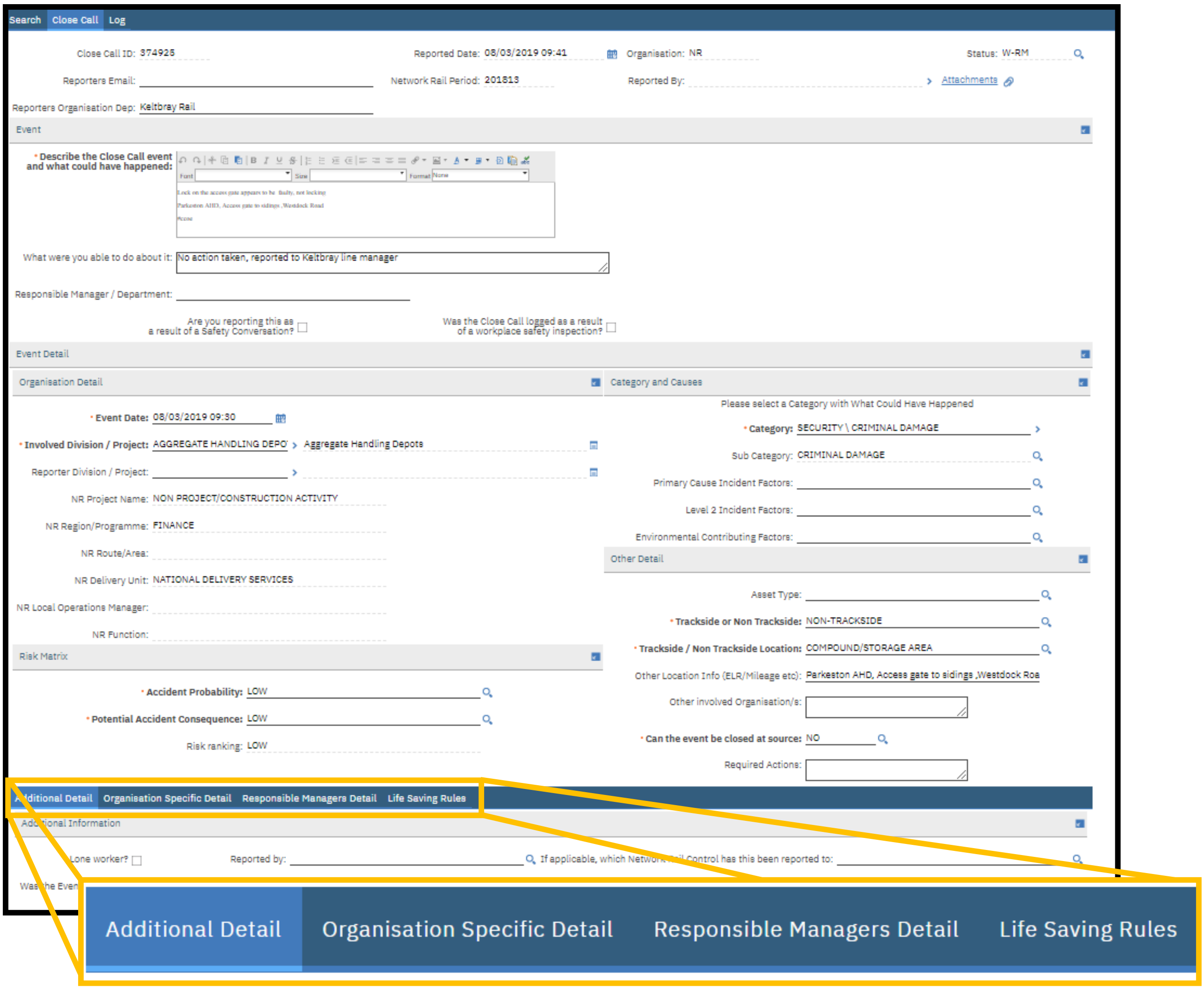
# QUICK REFERENCE GUIDE – PROGRESSING A CLOSE CALL TO CLOSURE

## Introduction

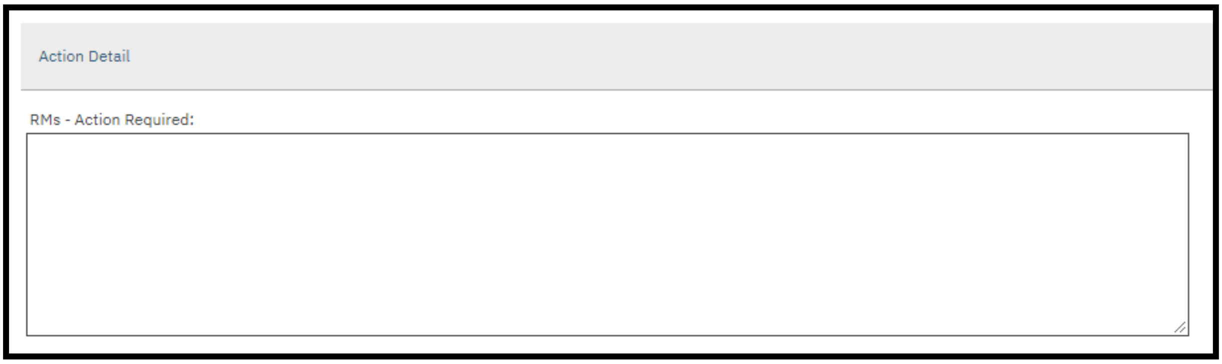
This section is to be completed by the RM to enable them to describe what has been done about the close call and to record completion dates etc.

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

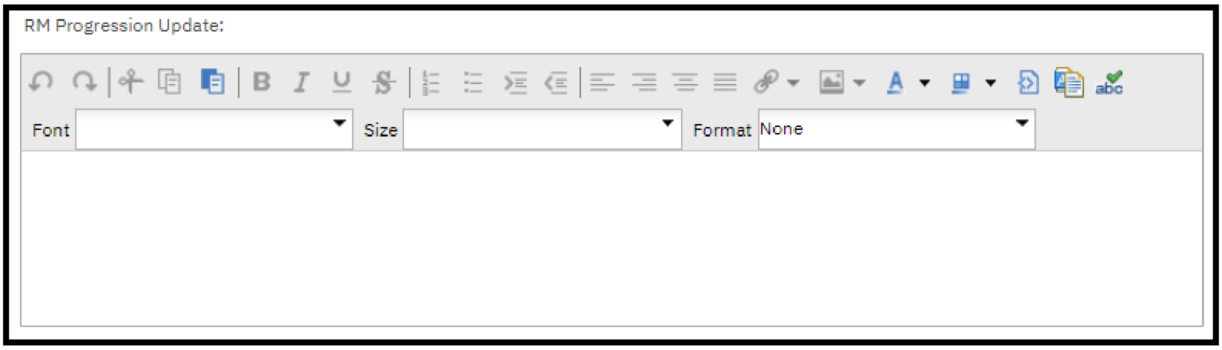


# Providing Progression Update(s) on a Close Call

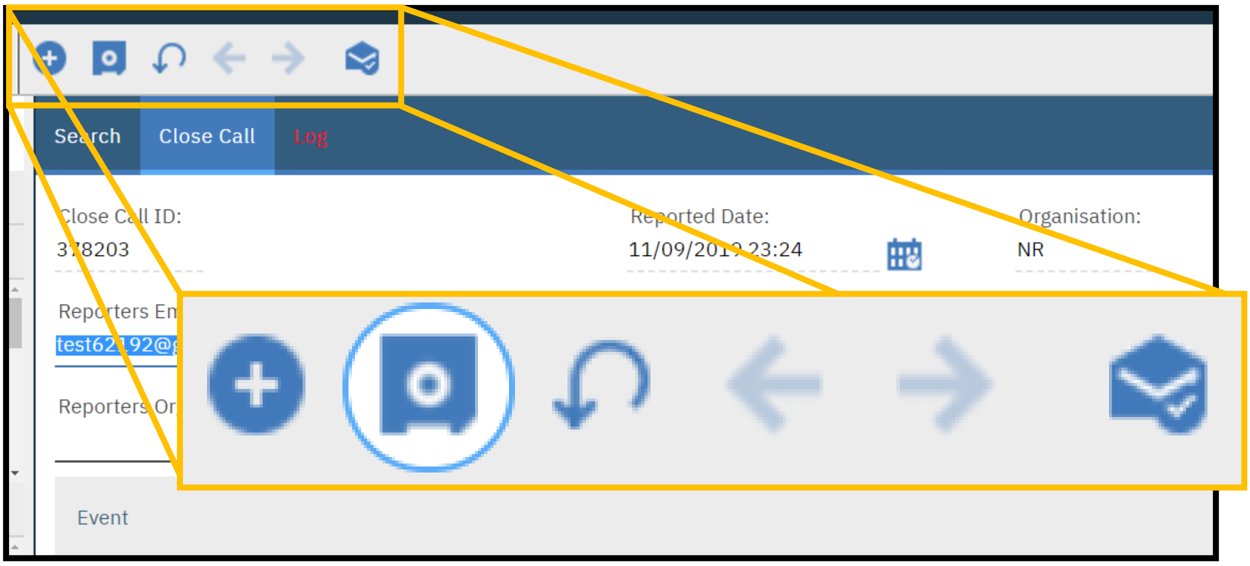
Within the RM details tab, when a close call is accepted by a RM, they will be required to populate the **'RMs - Actions Required'** field in the ***Responsible Manager Detail*** tab. This field can be updated if additional actions are required or the initial action required has been modified.




The 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

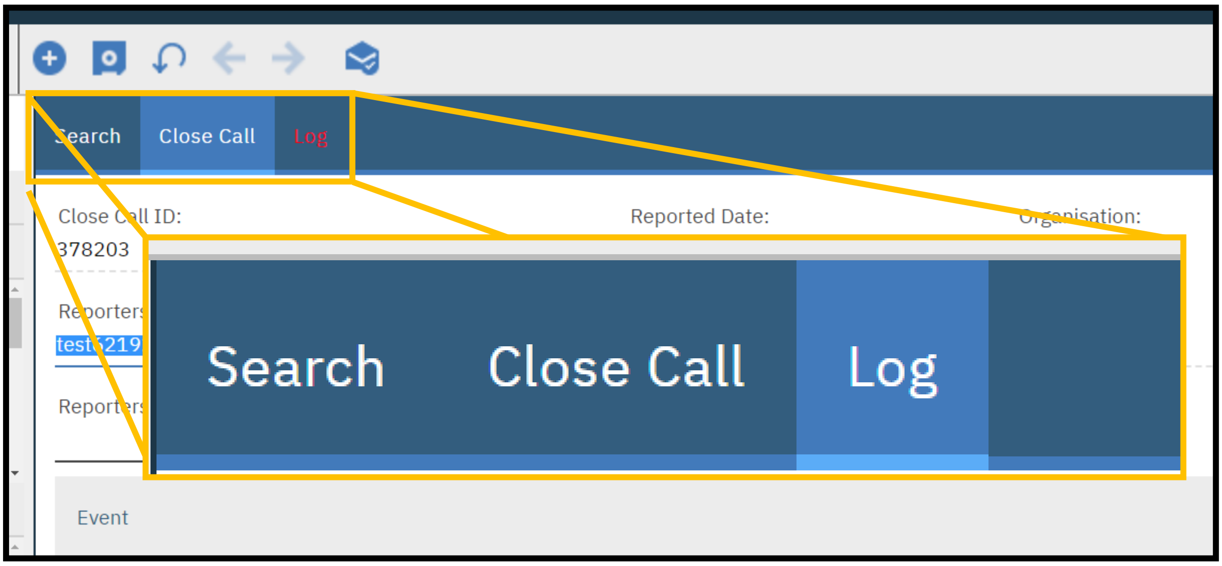


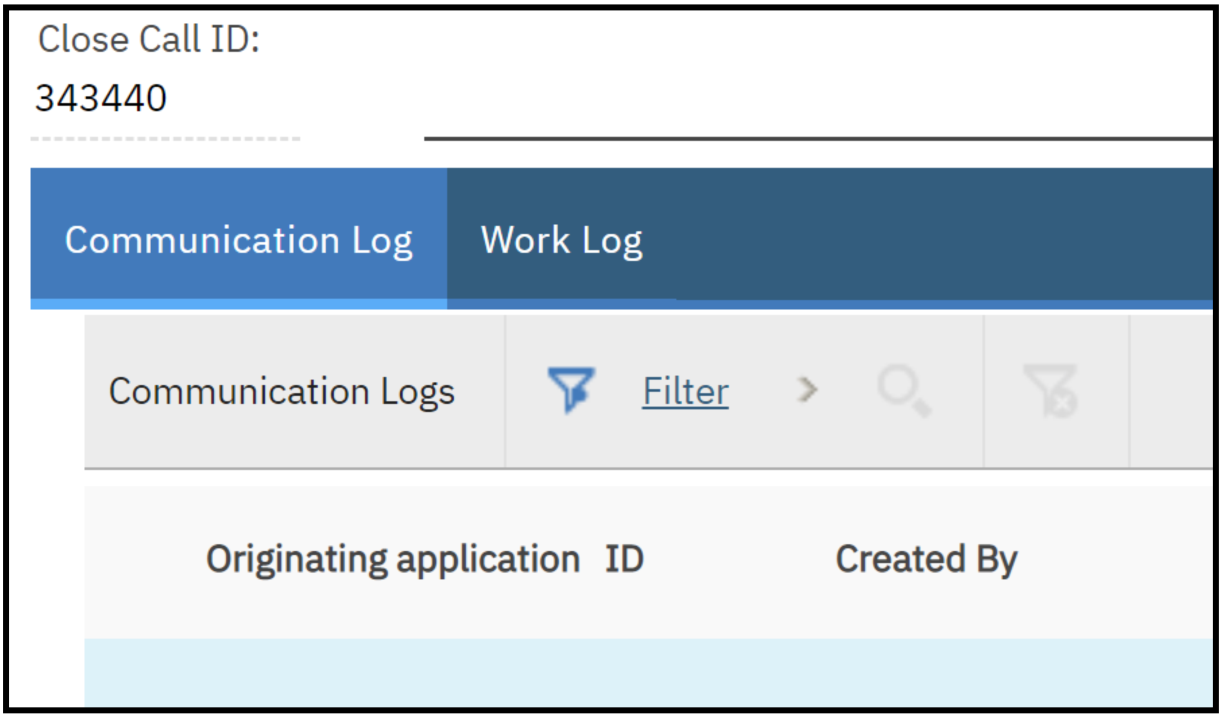

When this field is updated, the RM will be required to select the Save icon to ensure their new note is saved and a notification via email and text message are sent to the close call reporter.

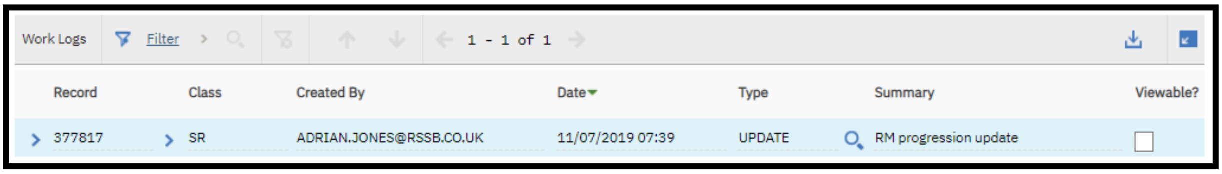



Once the RM has saved an update, they will be able to add additional notes right away.

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.

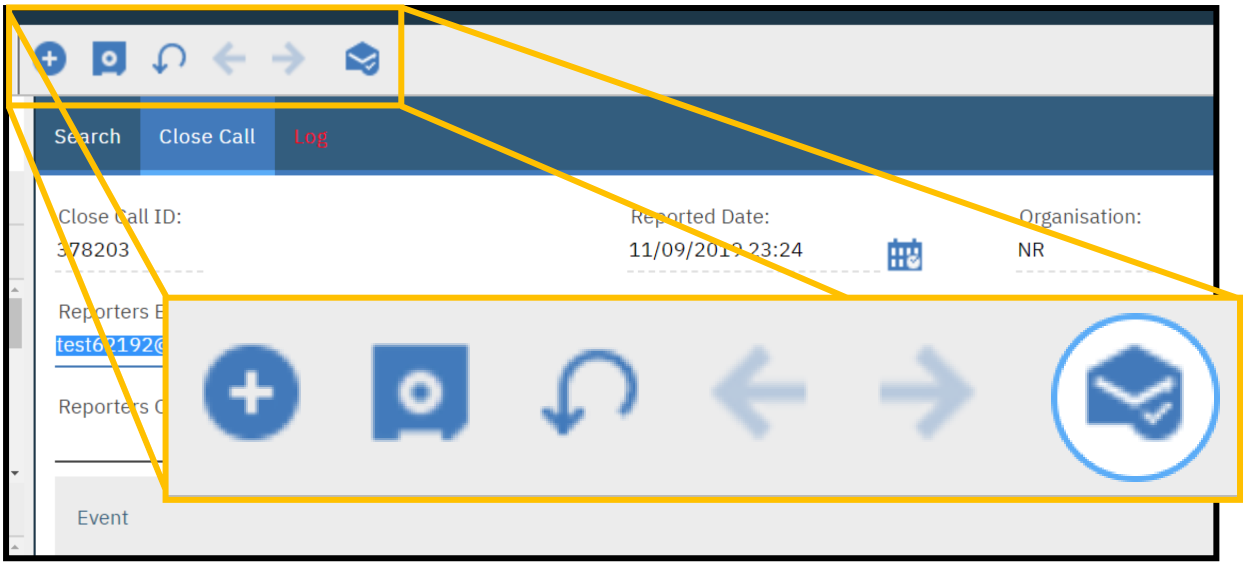



## Progress the Close Call to the Assurance Manager for review

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.