

QUICK REFERENCE GUIDE - ACCEPTING A CLOSE CALL

Introduction

When a close call event is entered that is assigned to a project (or level of the organisation hierarchy), the AM assigned to that project will receive notification via email. The email will look like this

Event Date: 11/7/17 8:59 AM

Event Location: LEEDS CITY STATION

Project/Division: LEEDS CITY STATION

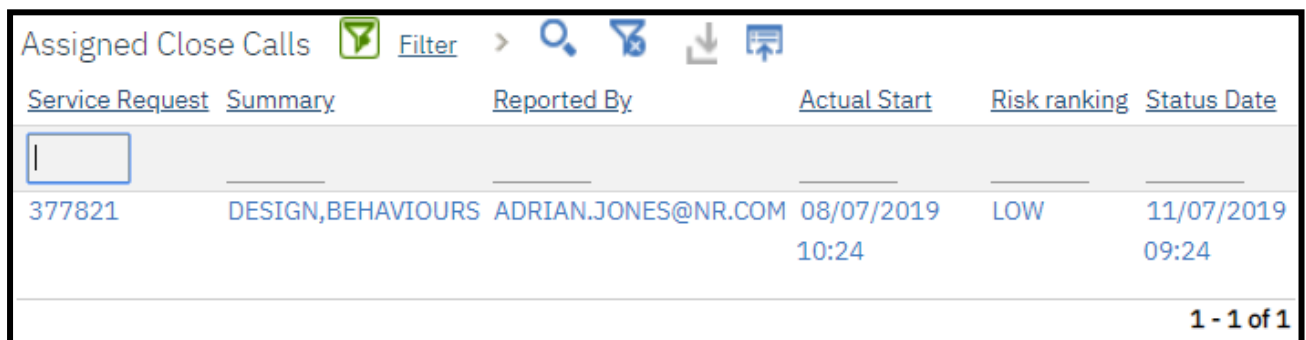
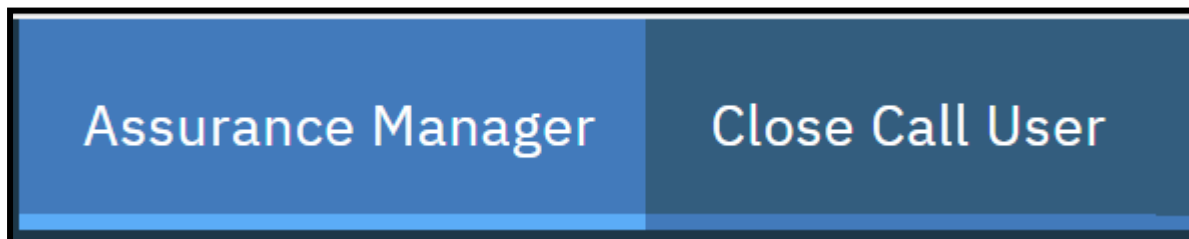
Risk Ranking: HIGH

Event Description: Test

Please log on to the [Close Call System](#) and complete the required actions for this reported Close Call. This Close Call must be accepted or rejected by you within a reasonable timeframe in line with guidance.

Each email will have a Hyperlink which will take them directly to the close call event

If an AM is logged into Close Call, they can view any close calls requiring action by them via the **Assigned Close Calls** portlet under the **Assurance Manager** tab, which look likes this



The image shows a screenshot of a web application interface for 'Assigned Close Calls'. At the top, there is a search bar and several icons (Filter, Search, Refresh, Download, Print). Below the search bar is a table with the following columns: Service Request, Summary, Reported By, Actual Start, Risk ranking, and Status Date. The table contains one row of data. At the bottom right of the table, it says '1 - 1 of 1'.

Service Request	Summary	Reported By	Actual Start	Risk ranking	Status Date
377821	DESIGN,BEHAVIOURS	ADRIAN.JONES@NR.COM	08/07/2019 10:24	LOW	11/07/2019 09:24

Note: Events that are awaiting AM review for divisions/projects below theirs in the organisation hierarchy will also appear in this portlet. Be careful not to open events that are not yours to review to avoid locking the event to your user.

Click on the **Close Call ID** to open the event record.

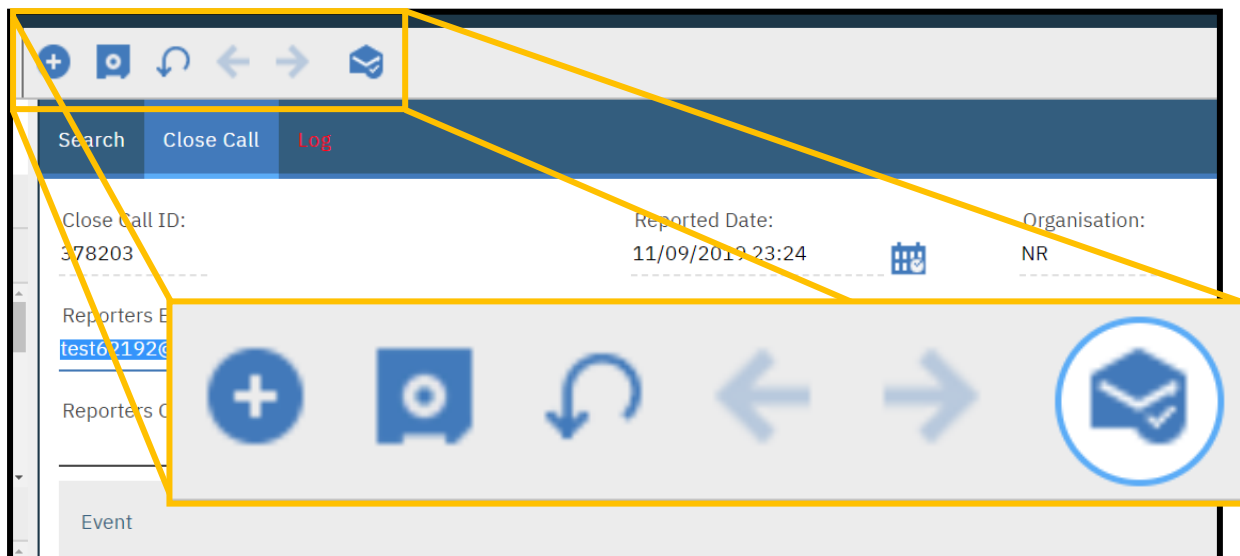
Reviewing a Close Call

The AM should review the event information and what was done to rectify or mitigate the close call. They should check that the fields have been correctly input. The AM should review the **Responsible Manager Action** field under the **Responsible Managers Detail** tab to review the feedback provided by the Responsible Manager and consider whether feedback is structured for reporting with details of action(s) taken to remove/reduce risk highlighted by the Reporter.

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: 08/08/2019 09:41', 'Organisation: NR', and 'Status: W-RM'. Below this, there are fields for 'Reporters Email', 'Network Rail Period: 201813', and 'Reported By'. The 'Event' section contains a rich text editor for describing the incident and a text box for 'What were you able to do about it:'. The 'Event Detail' section is divided into 'Organisation Detail' and 'Category and Causes'. The 'Risk Matrix' section shows 'Accident Probability: LOW', 'Potential Accident Consequence: LOW', and 'Risk ranking: LOW'. At the bottom, a navigation bar has four tabs: 'Additional Detail', 'Organisation Specific Detail', 'Responsible Managers Detail', and 'Life Saving Rules'. A yellow callout box highlights these tabs, with a line pointing to the 'Responsible Managers Detail' tab in the main form area.

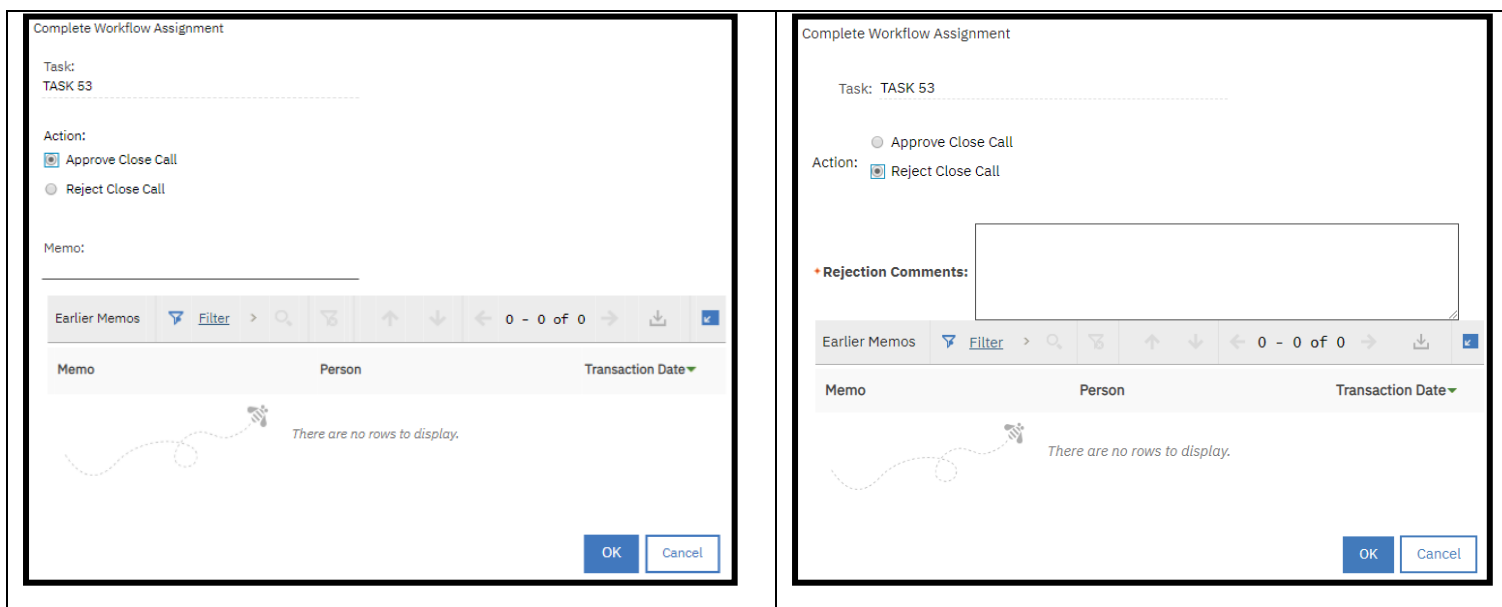
Progress the Close Call to Closure (or rejection)

Following completion of the AM Review, the AM can process the close call to closure. This is done by clicking on the process icon on the top menu bar.



The *Complete Workflow Assignment* pop up window will appear, asking the AM to confirm if the close call event should be accepted or rejected. If accepted, click OK.

If the AM decides to reject the Close Call Event, they will be required to provide a reason(s) for rejection in the Rejection Comments box, prior to selecting OK.



Once okay has been selected you will be returned to the close call reporting screen.