QUICK REFERENCE GUIDE - ACCEPTING A CLOSE CALL

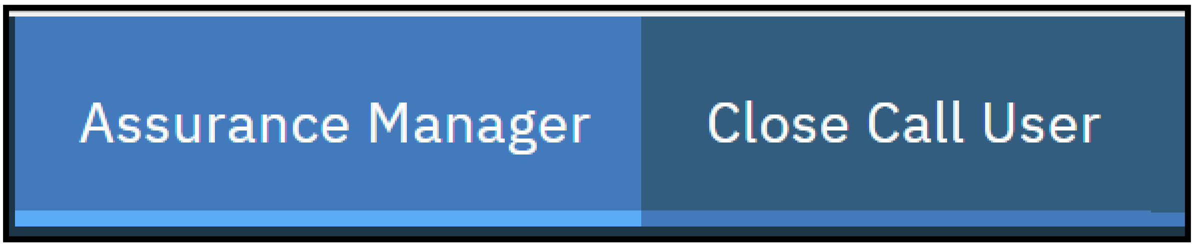
Introduction

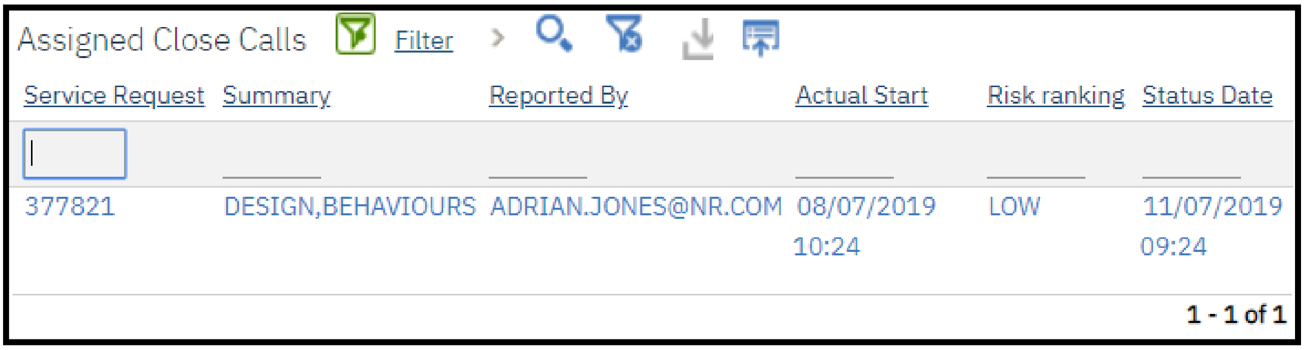
When a close call event is entered that is assigned to a project (or level of the organisation hierarchy), the AM assigned to that project will receive notification via email. The email will look like this

> 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 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





Assigned Close Calls Filter

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

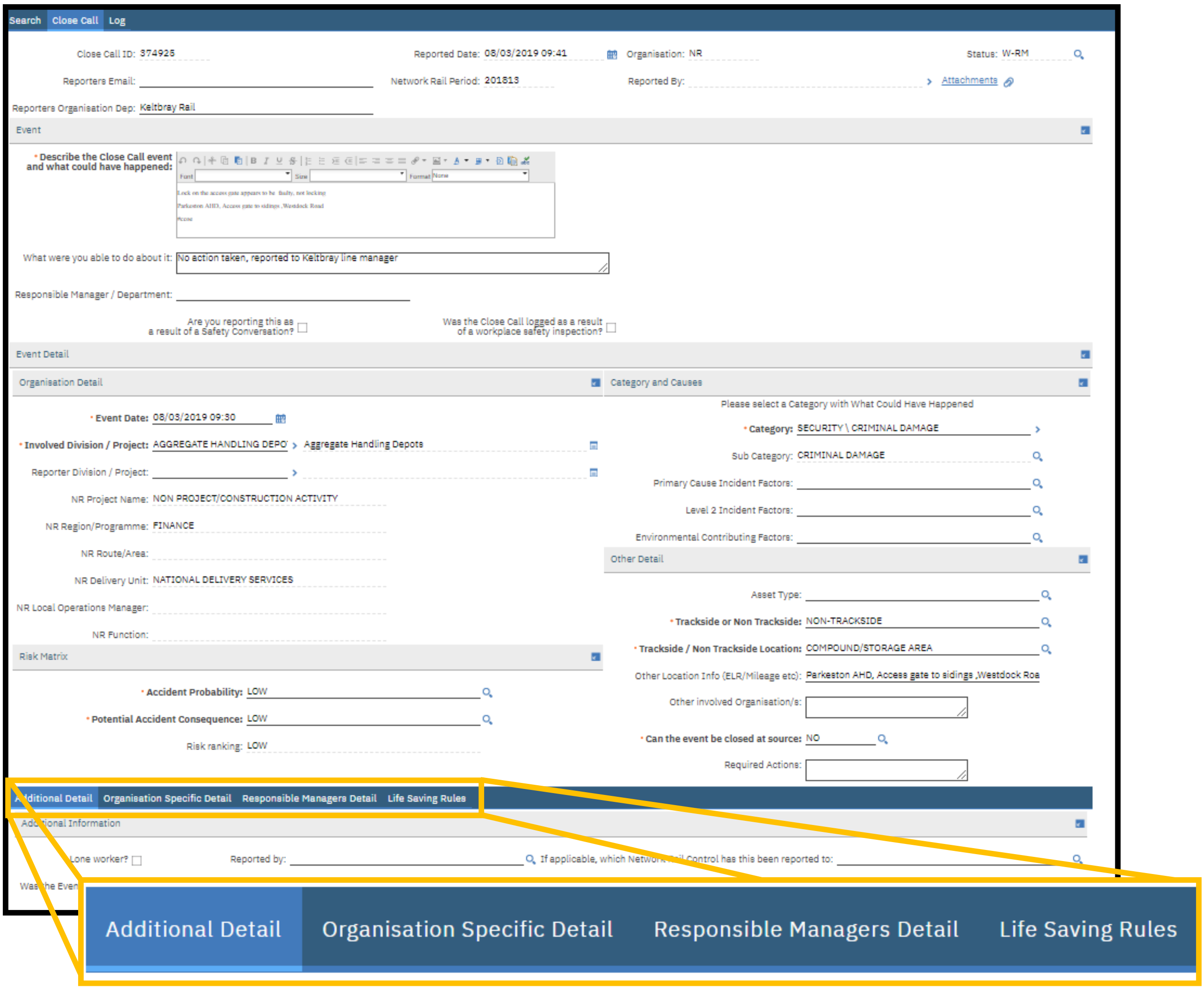
1 - 1 of 1

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.

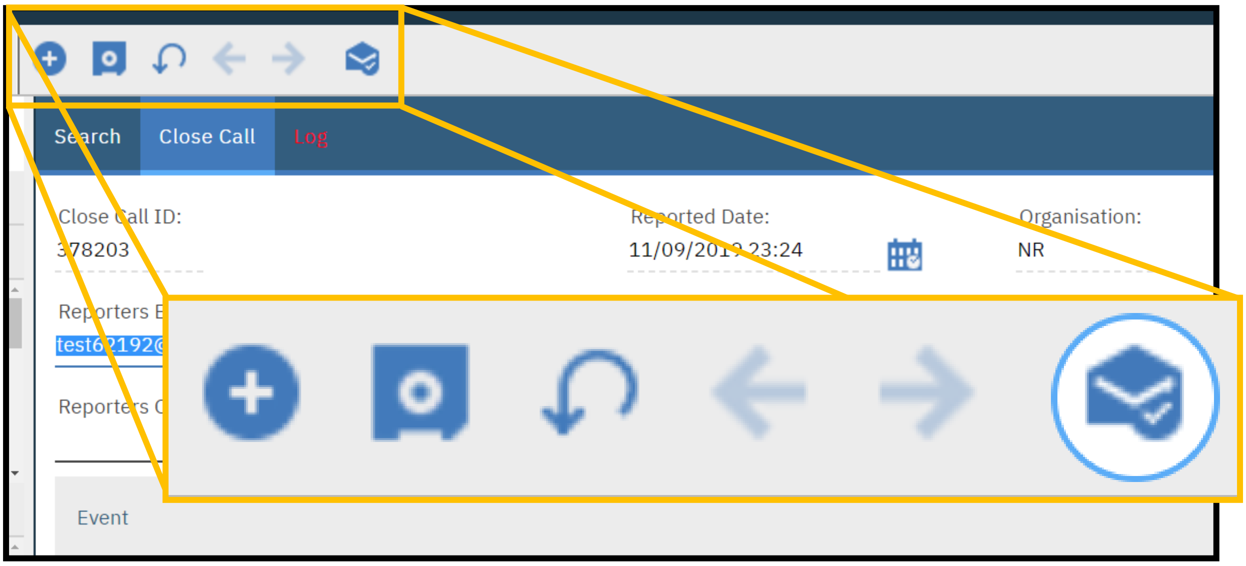
Reviewing a Close Call

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.



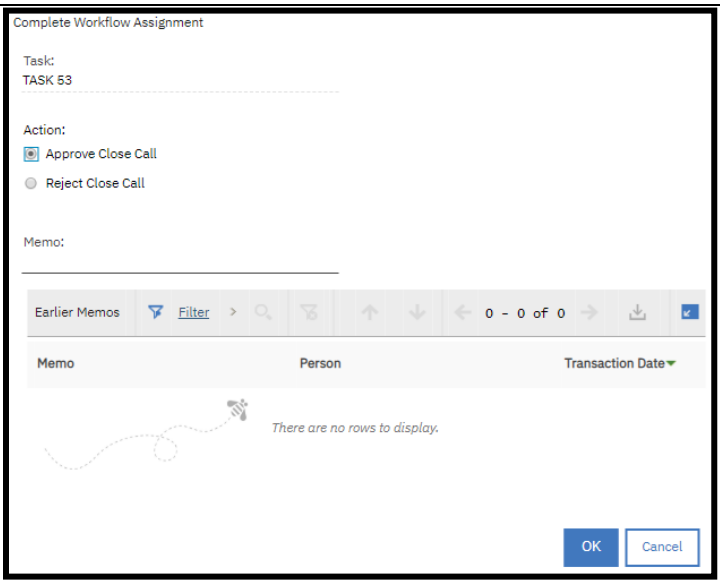
Progress the Close Call to Closure (or rejection)

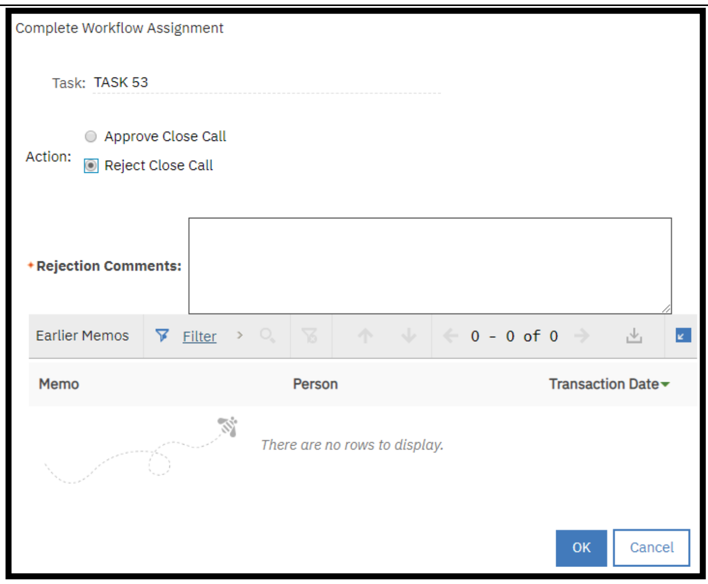
Following completion of the AM Review, the AM can process the close call to closure. This is done by clicking on the process icon on the top menu bar.



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.