

Investigate an Incident

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The **Incident Owner** is responsible for opening investigations and assigning Investigators.

The screenshot shows the 'My Tasks' page with three incident cards. The first is 'INC-6: 2021 - Staff Injury' in 'DRAFT' state. The second is 'INC-99: 2021 - Slip and Fall' in 'TRIAGE' state. The third is 'INC-80: 2021 - Counterfeit Bank Card' in 'UNDER INVESTIGATION' state. To the right, the 'Incident Workflow State' chart shows a bar for 'Under Investigation' at 1, 'Draft' at 1, and 'Triage' at 1.

An incident under investigation in the My Tasks page.

To document an investigation into an incident:

1. Go to the My Tasks page.
2. Click an incident in the Under Investigation state to view the Incident details.

The screenshot shows the 'INC-873: 2021 - Counterfeit Bank Card' details page. The 'Details' tab is active. The 'Investigation' section includes fields for 'Investigator' (Incident Investigator), 'Investigation Start Date' (May 9, 2021), and 'Investigation Close Date' (March 12, 2024). The 'Description' field contains placeholder text. The 'Action Plan & Logs' section has tabs for 'Subjects', 'Evidence', 'Interviews', 'Links & Attachments', and 'Root Cause/Outcomes'. Below are 'Incident Tasks' (with a '+' button) and 'Incident Logs' table:

Log Date/Time	Name	TimeSpent (Minutes)	Cost (\$)
October 26, 2021 2:45 am	Test Log 1	1440	1000

The 'Investigations Summary' sidebar shows: Outcome Overview (placeholder text), Investigation Cost (\$1,000.00), Investigation Duration (1037), Investigation POIs (0), Investigation Time Spent (Hours) (24), and Investigation Start Date (May 9, 2021).

Viewing an incident under investigation.

3. Complete the following fields in the Details section, as needed:
 - o Investigator
 - o Investigation Start Date
 - o Investigation Close Date

- Description.
4. Complete the fields in these tabs below, noting that your user group may not be permitted to edit all fields within these sections:
- Action Plans & Logs
 - Evidence
 - Interviews
 - Links & Attachments
 - Root Causes/Outcomes.
5. Scroll to the bottom of the form and click one of following buttons:
- **Return:** Returns the incident back to the Incident Owner in the **Open** state.
 - **Complete Investigation:** Closes the incident because no further action is required. The incident can be viewed and reopened by the Incident Owner and the Incident Supervisor. Read more here: [View and Reopen a Closed Incident](#).