

Triage an Incident

Last Modified on 02/15/2023 11:07 am EST

Overview

These instructions are for accessing Incidents in the Triage state from the Incident Management application.



Note:

*Members of the Incident Screener User Group can also view and open Incidents on the My Task list on the **Home** screen.*

User Account Requirements

The user account you use to log into Resolver must be part of the Incident Screener User Group.

Related Information/Setup

You also need to ensure that the user you are using to log into Resolver is part of the Incident Screener User Group. Please follow the link below for instructions on **Creating a User Group** and **Adding a User to a User Group** :

- [Creating a New User Group](#)
- [Adding a User to a User Group](#)

Users can add and reply to comments on incidents and most related objects depending on their User Group and account permissions. Please refer to the Incident Form Comments Overview article for more information.

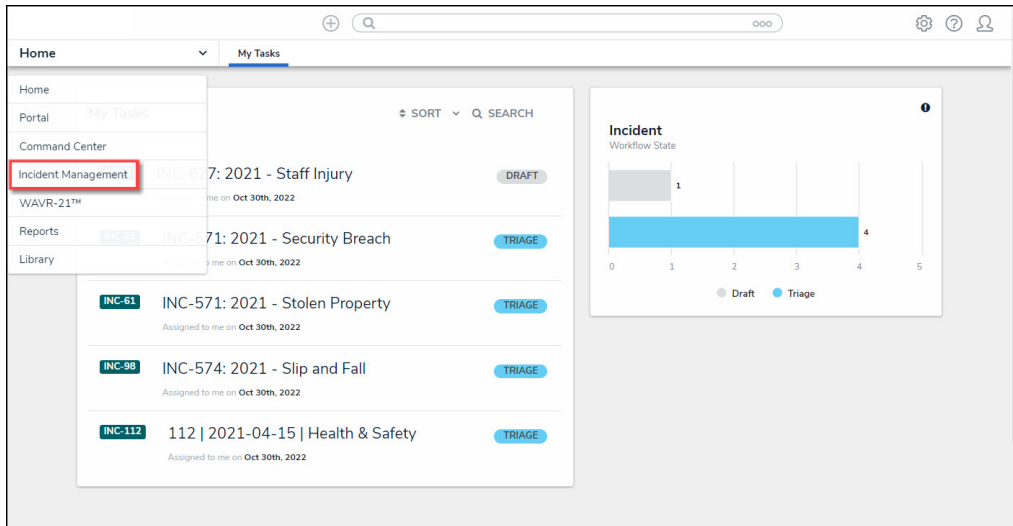
- [Incident Form Comments Overview](#)

For more information regarding the options available for the Form Header, please refer to the Form Header Overview article.

- [Form Header Overview](#)

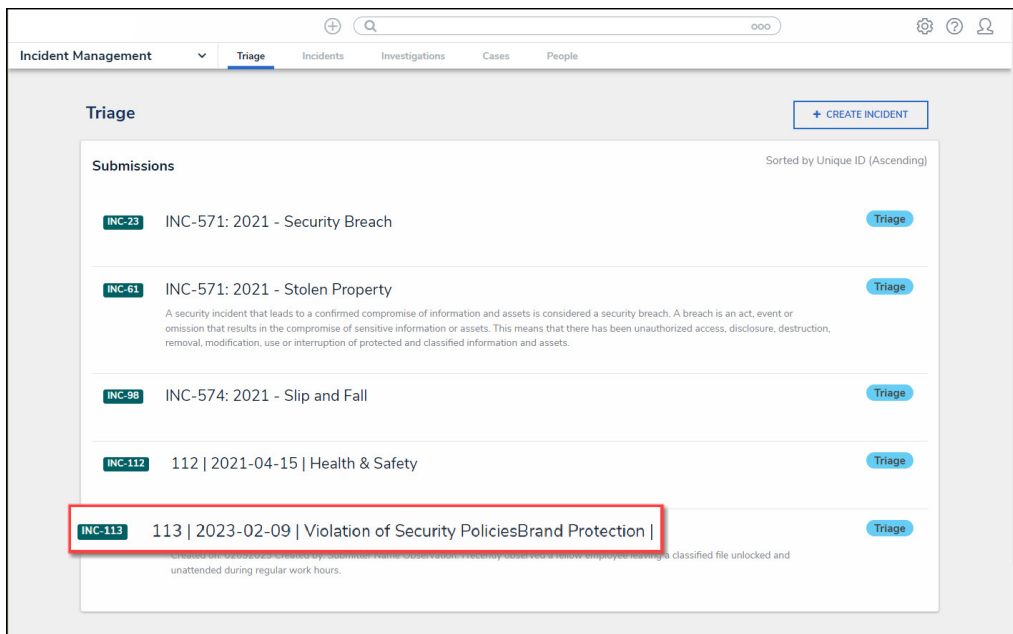
Navigation

1. From the **Resolver Home** screen, click the **Home** dropdown and select the **Incident Management** link.



Incident Management Link

2. From the **Triage** screen, click an **Incident Name** from the **Submissions** section.



Submissions Section

Triage an Incident

When an Incident is submitted through the Confidential Portal, Incident Screeners will receive an email notification with a direct link to the Triage form.

1. The **Incident Form** screen will appear.

Incident Form Screen

2. **(Optional)** Click the **Incident Form Header** to edit the **Incident Form Name**. After editing the **Incident Form Name** click outside the field to save your changes.

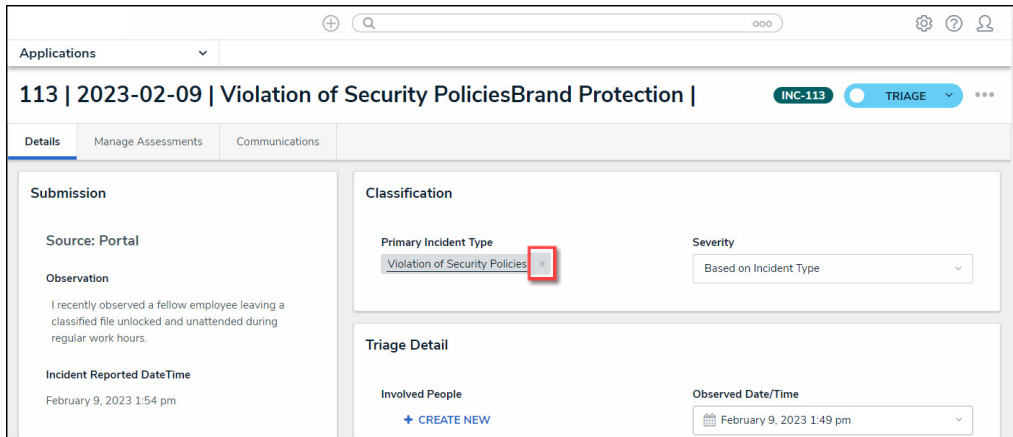
Incident Form Header

3. **(Optional)** Click the **Delete** icon next to the **Primary Incident Type** field to choose a different Incident Type (e.g., change the Incident Type selected by the Submitter).



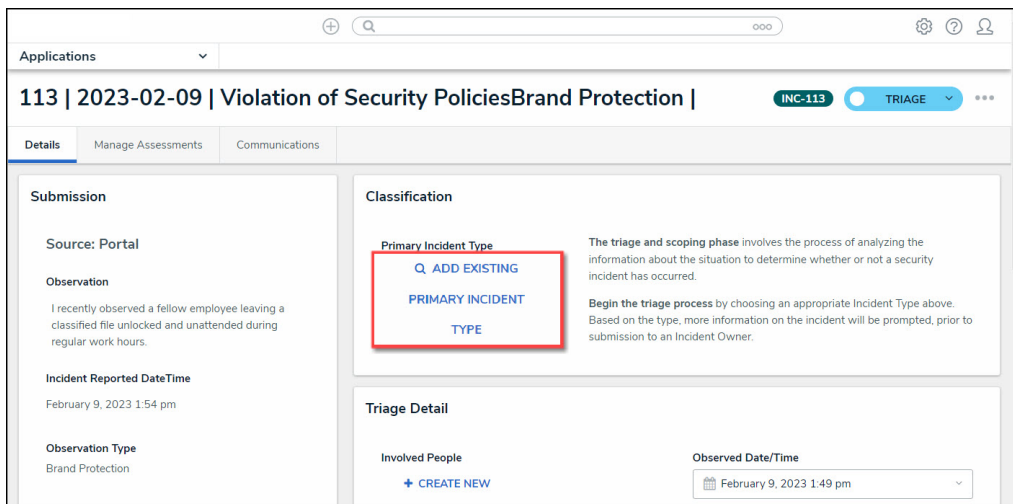
Note:

*The **Primary Incident Type** dictates which fields will appear on the **Incident Form** screen.*



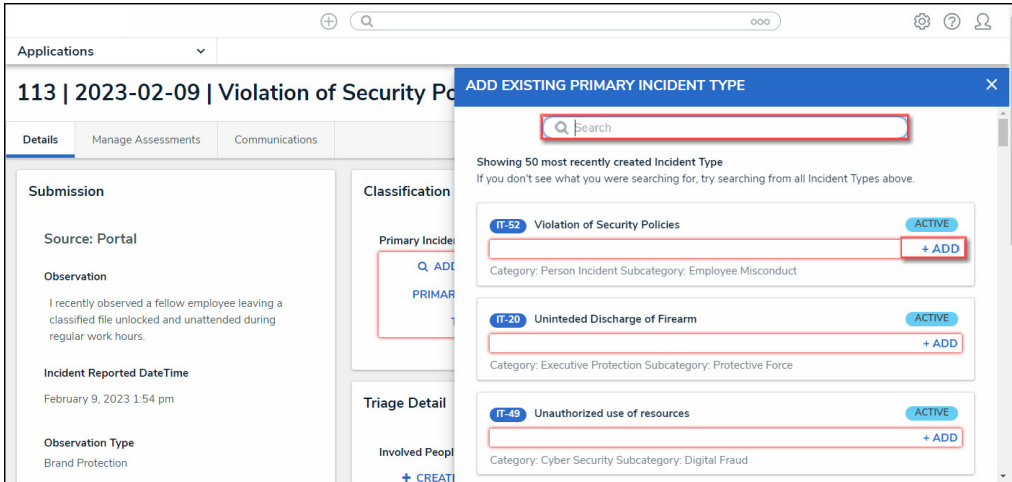
Delete Icon

- The **Add Existing Primary Incident Type** link will appear.



Add Existing Primary Incident Type Link

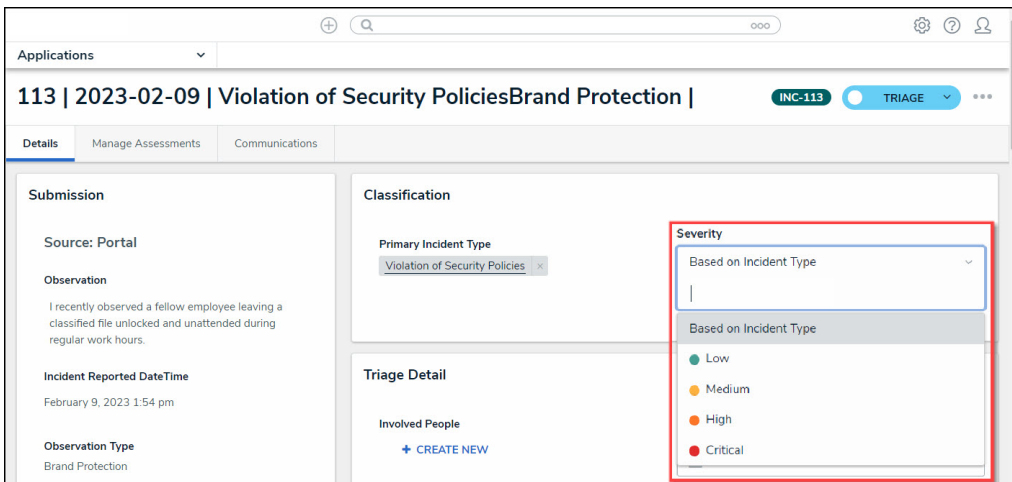
- Click the **Add Existing Primary Incident Type** link.
- From the **Add Existing Primary Incident Type** pop-up, select an **Incident Type** from the **50 most recently created Incident Type** list by clicking the **+Add** link or enter an **Incident Type Name** in the **Search** field to search for an Incident Type that is not listed.



Add Existing Primary Incident Type Pop-up

4. **(Optional)** Edit the Incident's severity score by selecting a severity type from the **Severity** dropdown menu.

- **Based on Incident Type:** The **Based on Incident Type** will automatically set the severity level to one of the types (Low, Medium, etc.) based on the severity of the **Primary Incident Type**.



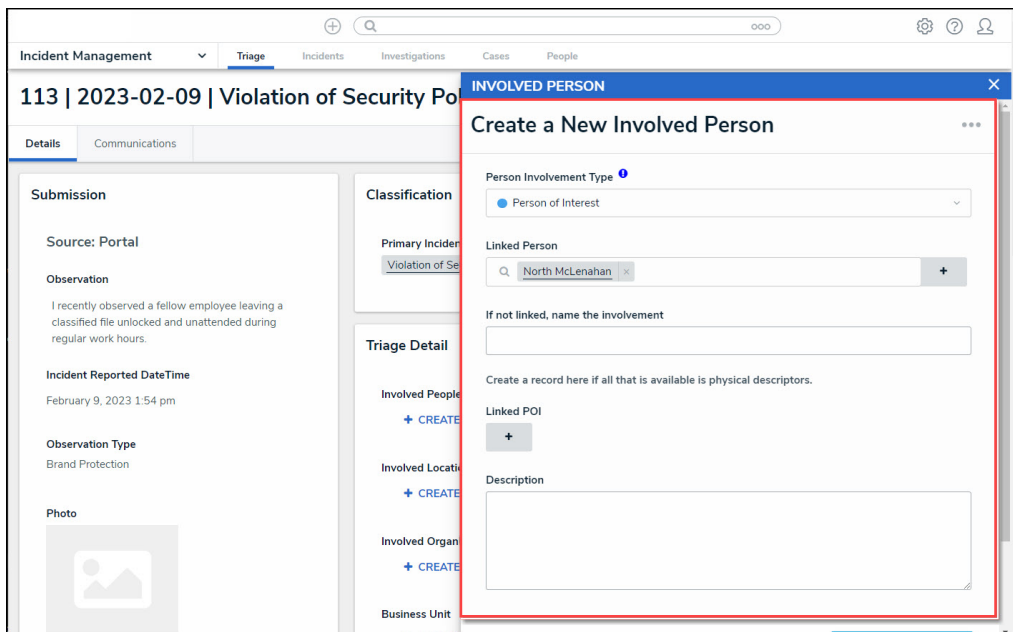
Severity Dropdown Menu

5. From the ***Triage Details*** section, the following details can be added:

Involved People

- Click the **+ Create New** link to add a new Involved Person to the Incident details.
- From the **Create a New Involved Person** pop-up, you can add the following information:
 - **Person Involvement Type:** Select how the person is involved with the Incident from the **Person Involvement Type** dropdown menu. The **Linked POI** field will appear if you select **Suspect** or **Person of Interest**.

- **Linked Person:** Enter the name of the person involved in the **Linked Person** field and select the person or persons from the dropdown menu. If the person involved is not already in the system, click the + button to add the person.
- **If not linked, name the involvement:** Enter the name of the person involved if the person does not exist in the system and the user does not want to be added to the system.
- **Linked POI:** The **Linked POI** (Point of Interest) field appears when **Suspect** or **Person of Interest** is selected in the **Person Involvement Type** field. Click the + button to add a personal description (e.g., height, weight, eye color, etc.) of the person of interest.
- **Description:** Add further details about the person of interest in the **Description** text box.
- Click the **Create** button to add the person of interest to the Incident.

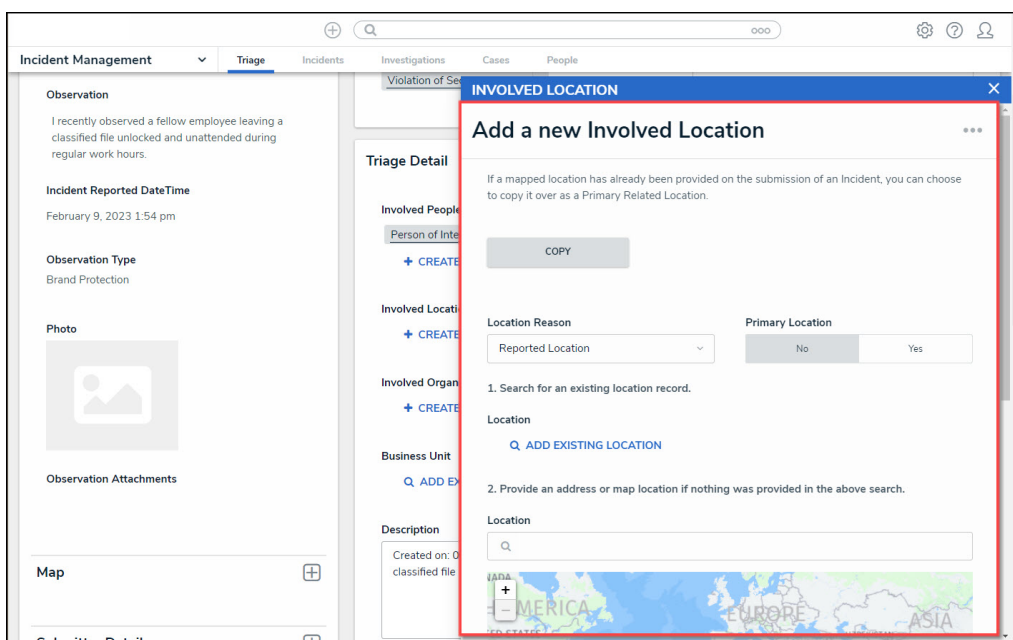


Create a New Involved Person Pop-up

Involved Location

- Click the **+ Create New** link to add a new Involved Location to the Incident details.
- From the **Add a New Involved Location** pop-up, you can add the following information:
 - **Copy:** The **Copy** button will copy the location details from the Incident Submission form.
 - **Location Reason:** Select how the location is involved with the Incident from the **Location Reason** dropdown menu.
 - **Primary Location:** Indicate whether the location is the primary location for the Incident by selecting either the **No** or **Yes** toggle switches.

- **Add Existing Location:** Click the **Add Existing Location** link to select a location already in the system. The **Add Existing Location** pop-up will appear, allowing you to select an existing location by clicking the **+Add** link or searching for a location that is not on the list by entering the location's name in the **Search** field.
- **Address or Map Location:** Enter the address or map coordinates (longitude and latitude) of the location involved in the **Address or Map Location** field to pinpoint the location on the map.
- **Create:** Click the **Create** button to create the new involved location and add it to the Incident.



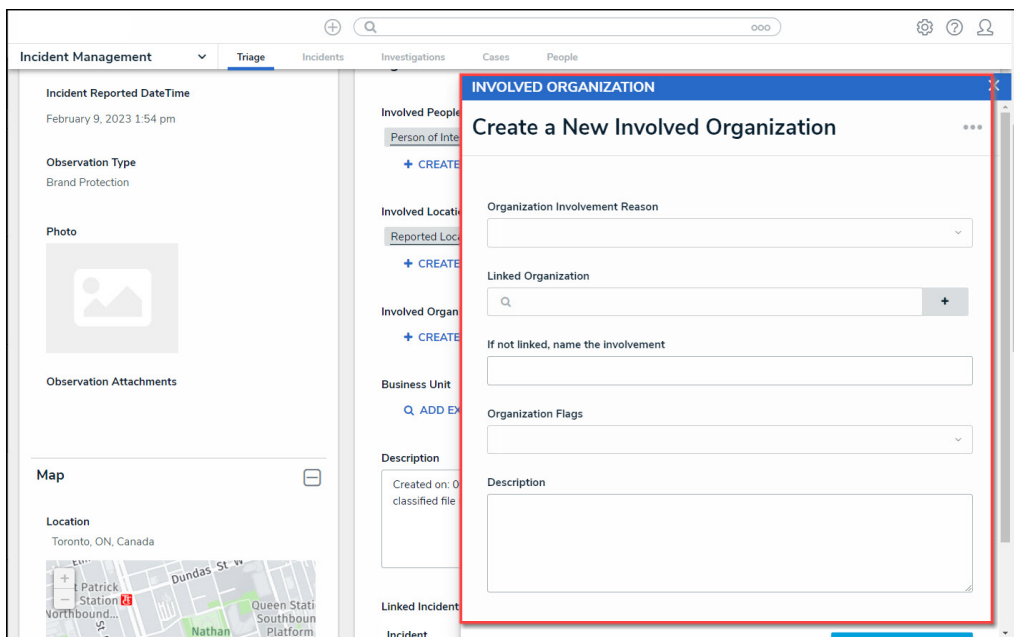
Add A New Involved Location Pop-up

Involved Organization

- Click the **+ Create New** link to add a new Involved Organization to the Incident details.
- From the **Create a New Involved Organization** pop-up, you can add the following information:
 - **Organization Involvement Reason:** Select how the Organization is involved with the Incident from the **Location Reason** dropdown menu.
 - **Linked Organization:** Enter the name of an Organization in the **Linked Organization** field and select an organization from the dropdown menu or click the **+** button to add a detailed description (e.g., image, organization name, etc.) of the Organization.
 - **If not linked, name the involvement:** Enter the name of the Organization involved if the Organization does not exist in the system and the Organization

does not want to be added to the system.

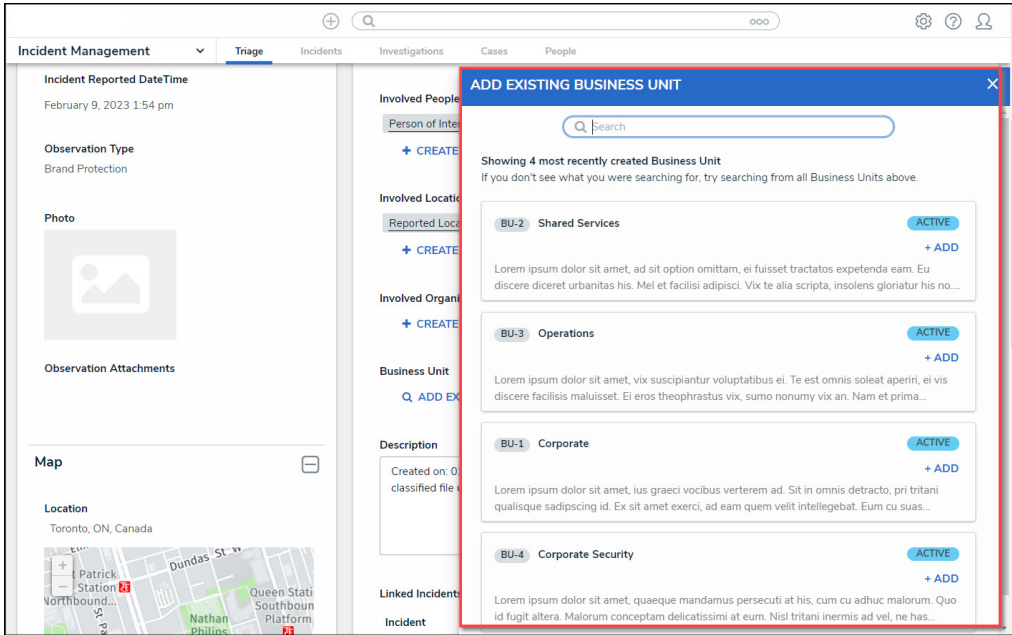
- **Organization Flags:** Enter the name of an Organization flag in the **Organization Flags** field and select a flag from the dropdown menu. Organization Flags help to organize Incidents and can be used for reporting purposes.
- **Description:** Add further details about the Organization in the **Description** text box.
- **Create:** Click the **Create** button to create the new Organization and add it to the Incident.



Create a New Involved Organization Pop-up

Business Unit

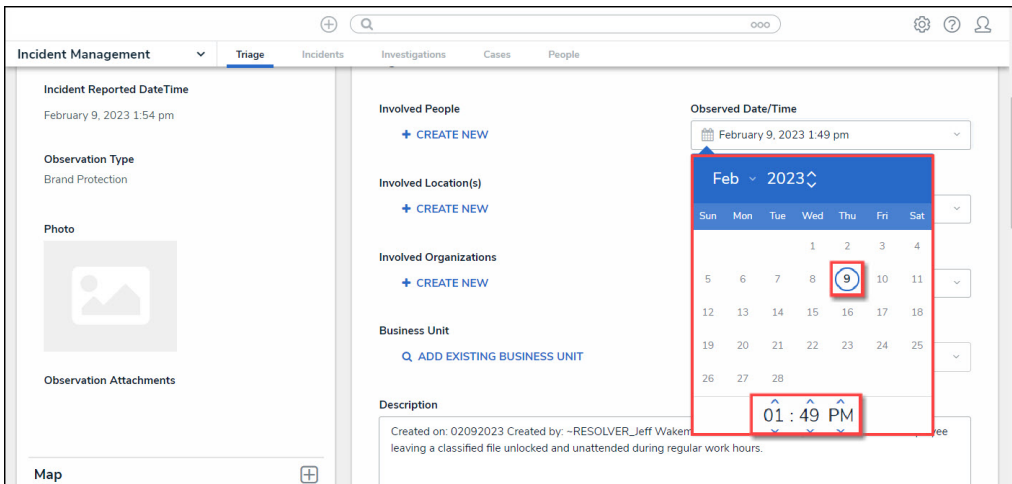
- Click the **+ Create New** link to add a new Business Unit to the Incident details.
- From the **Add Existing Business Unit** pop-up, you can add the following information:
 - The **Add Existing Business Unit** pop-up will appear, allowing you to select an existing Business Unit by clicking the **+Add** link or searching for a Business Unit that is not on the list by entering the Business Unit's name in the **Search** field.



Add Existing Business Unit Pop-up

6. From the **Triage Details** section, the following fields can be edited:

- **Observed Date/Time:** The **Observed Date/Time** records when the Incident occurred. Select the **Observed Date/Time** field and select a **Date** from the **Calendar** pop-up and a **Time** from the **Time** section using the increase and decrease arrows to choose the correct time.



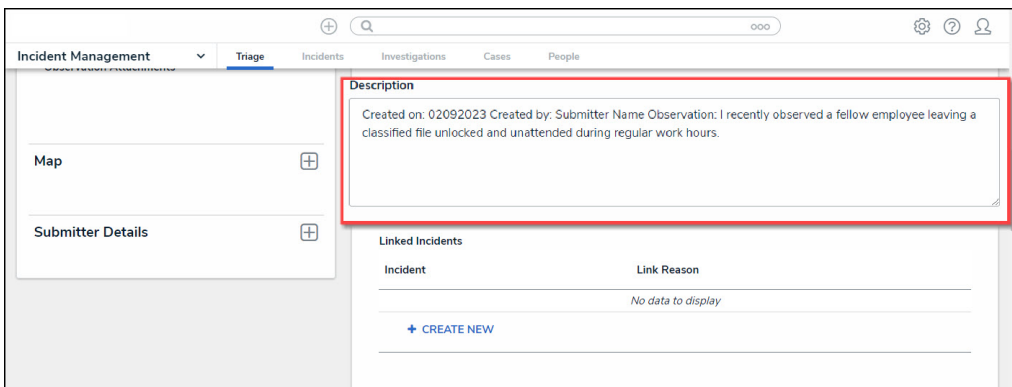
Calendar Pop-up

- **Incident Start Date/Time:** The **Incident Start Date/Time** records when the Incident began. Select the **Incident Start Date/Time** field and select a **Date** from the **Calendar** pop-up and a **Time** from the **Time** section using the increase and decrease arrows to choose the correct time.
- **Incident End Date/Time:** The **Incident End Date/Time** records when the Incident

ended. Select the **Incident End Date/Time** field and select a **Date** from the **Calendar** pop-up and a **Time** from the **Time** section using the increase and decrease arrows to choose the correct time.

- **Incident Flags:** An **Incident Flag** adds another level of detail to the Incident (e.g., Injury Occurred, Employee Involved, etc.). You can add multiple Incident Flags to an Incident by selecting Incident Flags from the **Incident Flag** dropdown menu.

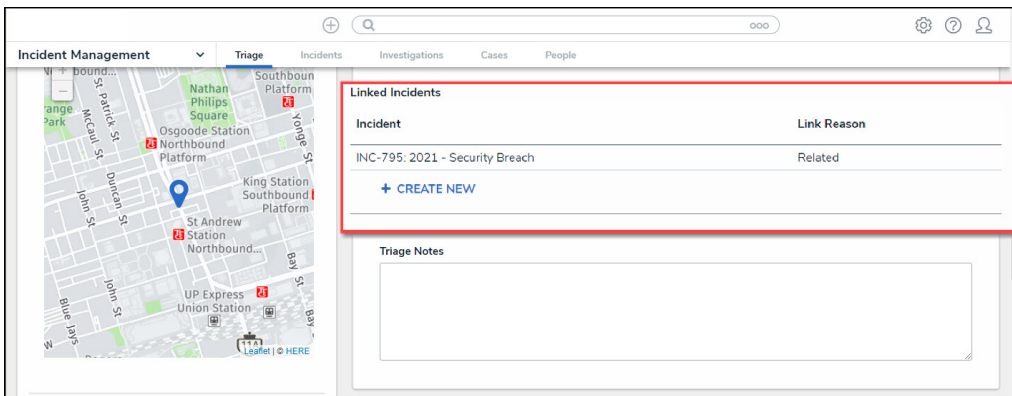
7. **(Optional)** Click the **Description** text box to edit the Incident description. The system will automatically fill out the **Description** text box with the **Create on** - date, **Created by** - Submitter Name (if not Confidential), and **Observation** information.



Description Text Box

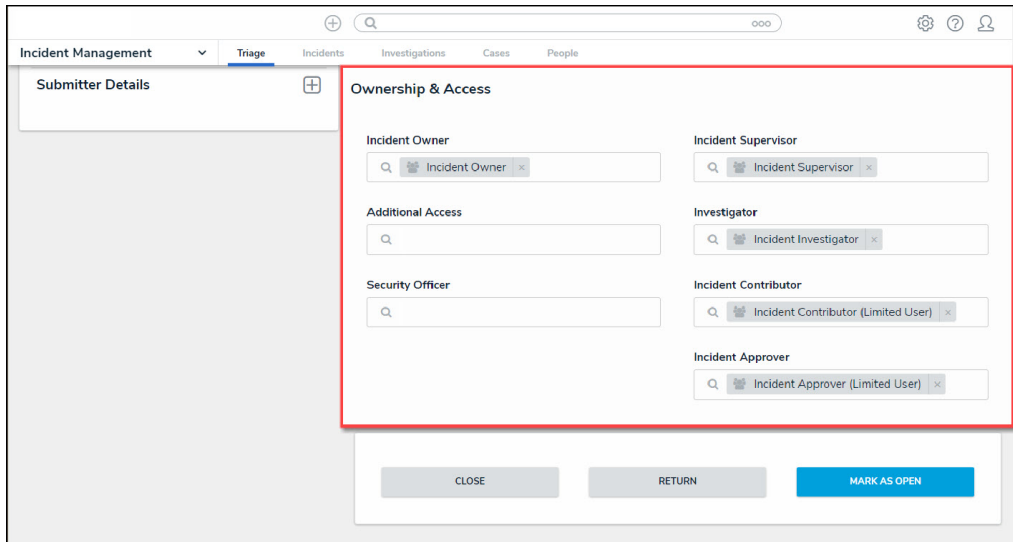
8. From the **Linked Incidents** section, the following details can be added:

- **Incident:** The **Incident** field lists the incident number and name. Click on the **Incident** to open the **Incident Link** pop-up to edit the **Incident Reason** field.
- **Link Reason:** Select a reason to link the Incidents from the **Link Reason** dropdown menu.
- **+ Create New:** Click the **+ Create New** button to open the **Create a New Incident Link** pop-up to create a link between an existing Incident and the new Incident by selecting a **Link Reason** and **Incident**.



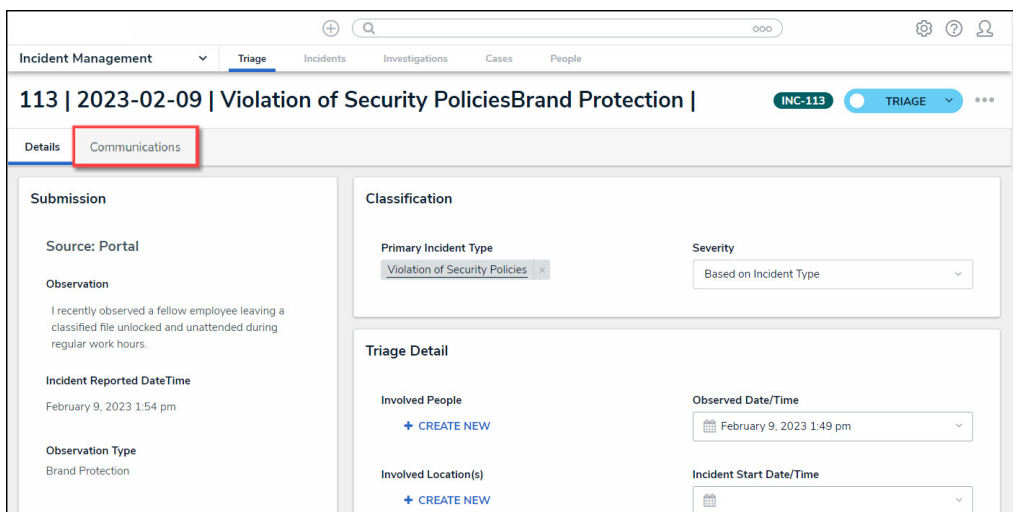
Linked Incidents Section

9. Enter any additional information or instructions in the **Triage Notes** text box.
10. From the **Ownership & Access** section, the following fields can be edited:
 - **Incident Owner:** Enter the **Name** of an Incident Owner or User Group in the **Incident Owner** field and select an Incident Owner from the dropdown menu. An Incident Owner creates and edits their assigned Incident Objects and related Relationship Objects. The user(s) will receive an email notification when assigned an Incident.
 - **Additional Access:** Enter the **Name** of a User or User Group in the **Incident Owner** field and select an Incident Owner from the dropdown menu. Defines additional users or groups who may need to access the Incident.
 - **Security Officer:** Enter the **Name** of a Security Officer or User Group in the **Incident Owner** field and select an Incident Owner from the dropdown menu. A Security Officer creates, monitors and updates Incidents with officer-specific functionalities (e.g., limited workflow and details).
 - **Incident Supervisor:** Enter the **Name** of an Incident Supervisor or User Group in the **Incident Owner** field and select an Incident Owner from the dropdown menu. An Incident Supervisor manages the Incident Objects in an **Archive** or **Review** state.
 - **Investigator:** Enter the **Name** of an Investigator or User Group in the **Incident Owner** field and select an Incident Owner from the dropdown menu. An Investigator will document Incident investigations.
 - **Incident Contributor:** Enter the **Name** of an Incident Contributor or User Group in the **Incident Owner** field and select an Incident Owner from the dropdown menu. An Incident Contributor contributes data to existing incidents (e.g., being assigned tasks, adding attachments).
 - **Incident Approver:** Enter the **Name** of an Incident Approver or User Group in the **Incident Owner** field and select an Incident Owner from the dropdown menu. An Incident Approver advances the workflow of a particular incident, providing reviews and approvals, and gets assigned specific tasks.



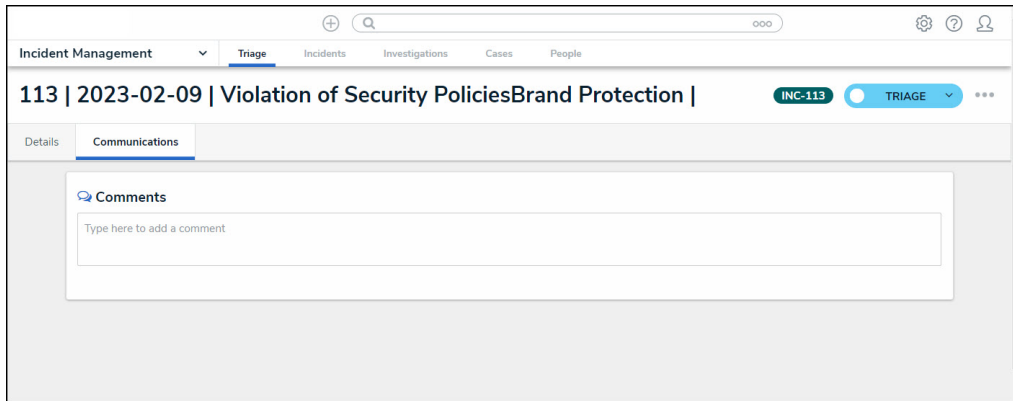
Ownership & Access Section

11. **(Optional)** Depending on user permissions, click the **Communications** tab on the **Incident Form** screen.



Communications Tab

- From the **Communications** screen, enter additional comments or tag users/resources in the **Comments** text box.



Communications Screen

12. Click the **Details** tab to get back to the **Incident Form** screen.
13. From the **Incident Form** screen, click one of the following buttons to complete the Incident Triage:
 - **Close:** The **Close** button will transition the Incident into the close stage if no further actions are required.
 - **Return:** The **Return** button will send the Incident back to the Submitter if additional information is required.
 - **Mark As Open:** The **Mark As Open** button sends the incident to the Users or User Group in the **Incident Owner** field if further action is required.