



Creating a New Close Call Event

Network Rail only

Version 2

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1 Introduction

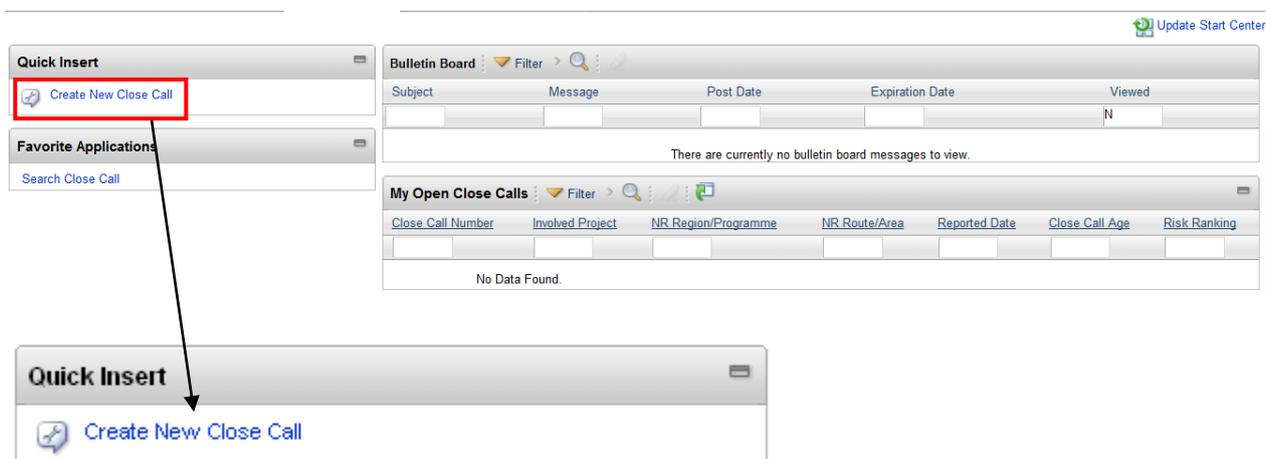
The Close Call System allows anyone with a user log on to create a close call record. If you do not currently have log on details to access the system, please see the guidance **'Registering to be a user of the Close Call System'**.

The close call record is mainly made up of drop down lists and selection boxes; however, there are some free text fields that allow you to explain in detail the close call event you are reporting. Some fields are mandatory in order to capture consistent information for the purposes of analysis; others are optional and allow the user to enter more information if they wish.

2 Creating a Close Call

Click on **'Create New Close Call'** within the Start Centre.

Figure 1



2.1 The Close Call Event Screen

The top grey boxes of the close call record are read only, and include details such as a unique Close Call ID, the 'Reported Date', which is the date the call is entered into CCS, the organisation and user details etc. There is also a field indicating the status of the report, which will indicate if the event is open, closed or if it has been processed for Responsible Manager (RM) review.

Figure 2



Fields marked with an * and a coloured background are mandatory and must be completed before an event can be processed.

Figure 3

The screenshot shows the 'Event' form interface. At the top, there is a toolbar with various icons for text formatting (bold, italic, underline, strikethrough, bulleted list, numbered list, indent, outdent, link, unlink, image, video, table, link, unlink, print, save, abc). Below the toolbar are three dropdown menus: 'Font' (set to 'sans-serif'), 'Size', and 'Format' (set to 'None'). The main text area is highlighted in yellow and contains the prompt: '* Describe the Close Call event and what could have happened:'. This text area is enclosed in a red rectangular box. Below this is a smaller text field with the prompt: 'What were you able to do about it:'. At the bottom of the form, there are two checkboxes: 'Are you reporting this as a result of a Safety Conversation?' (unchecked) and 'Was the Close Call logged as a result of a workplace safety inspection?' (unchecked).

2.2 Event Description

The event section consists of free text fields for the Close Call event description and what was done about it. The text format can be altered by using the icons provided.

Figure 4

This screenshot shows the 'Event' form with the description field filled. The text in the description field is: 'Abandoned sleeper obstructing site walking route. Could cause slip, trip or fall.' The text in the 'What were you able to do about it:' field is: 'Advised Site Manager so that it can be removed.' The two checkboxes at the bottom are now: 'Are you reporting this as a result of a Safety Conversation?' (unchecked) and 'Was the Close Call logged as a result of a workplace safety inspection?' (checked). A red rectangular box highlights both checkboxes. An arrow points from this box down to a larger, clearer view of the checkboxes in the next block.

There are two checkboxes to be ticked if the close call report was as a result of a safety conversation, or if the report came following a workplace safety inspection.

This is a close-up view of the two checkboxes from the previous figure. The first checkbox is 'Are you reporting this as a result of a Safety Conversation?' and it is unchecked. The second checkbox is 'Was the Close Call logged as a result of a workplace safety inspection?' and it is checked.

2.3 Organisation Detail

This section of the Close Call record is used to specify the date and time the event occurred and the 'Project' that it occurred on. You will only have the ability to select projects that sit at the level or lower in the organisation hierarchy, which is set on your user profile.

Once the project has been selected, the relevant NR Region/Programme, Route/Area, Delivery Unit etc. will auto-populate with the information held in the system for that project. This information is used for reporting purposes.

Figure 5

The screenshot shows a form titled "Organisation Detail". It contains several fields: "Event Date" with the value "10/11/14 09:45" and a calendar icon; "Involved Project" with a dropdown menu showing "LUTON STATION REDEVELOPMENT" and a right-pointing arrow icon; "NR Project Name" with the value "LUTON STATION REDEVELOPMENT"; "NR Region/Programme" with the value "CENTRAL"; "NR Route/Area" with the value "CEN EAST MIDLANDS"; "NR Delivery Unit" (empty); "NR Local Operations Manager" (empty); and "NR Function" (empty).

2.3.1 Date and Time of the event

Enter the date and time that the event occurred using the calendar icon.

Figure 6

The screenshot shows a form titled "Event Detail". Inside, there is a sub-section titled "Organisation Detail". The "Event Date" field is highlighted with a red box, and a calendar icon is visible next to it.

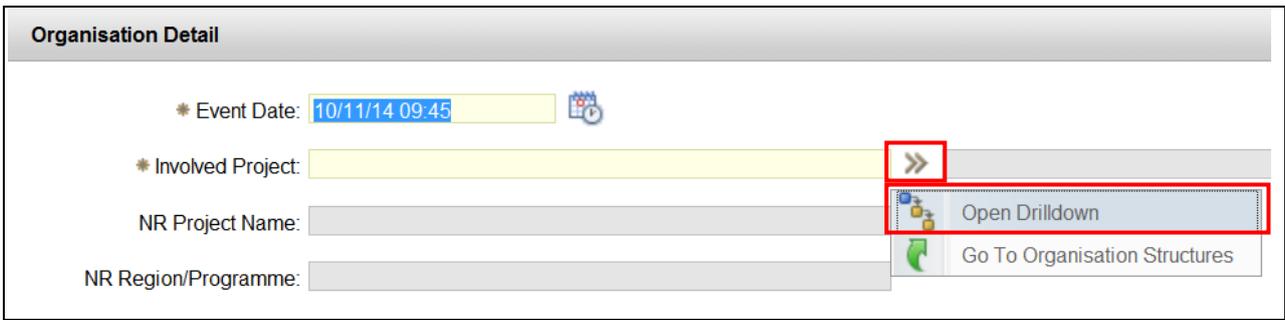
You can navigate to the correct date by using the left and right arrows next to the month or click on the month itself to view a drop down list. Select the day within the calendar. Use the arrows at the top and bottom of the time bar to scroll to the correct time the event occurred.

The screenshot shows the date and time selection interface. The "Event Date" field is set to "10/11/14 09:45". A calendar is open, showing the month of November 2014. The date "10" is selected. The time "09:45" is selected. The "OK" button is highlighted with a red box.

2.3.2 Involved Project

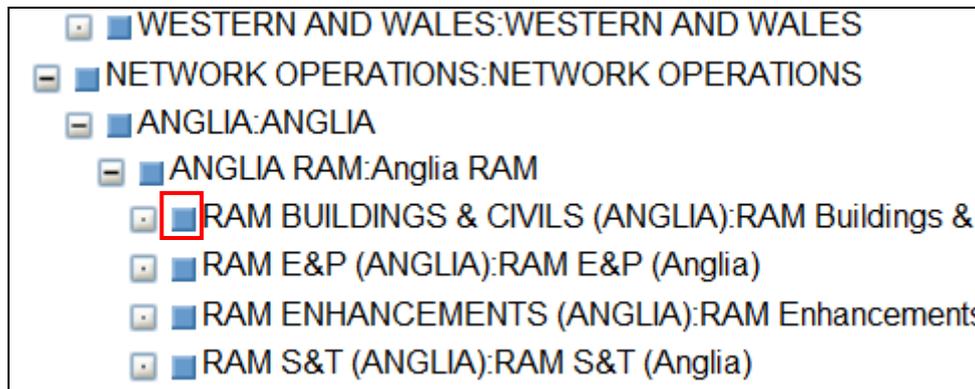
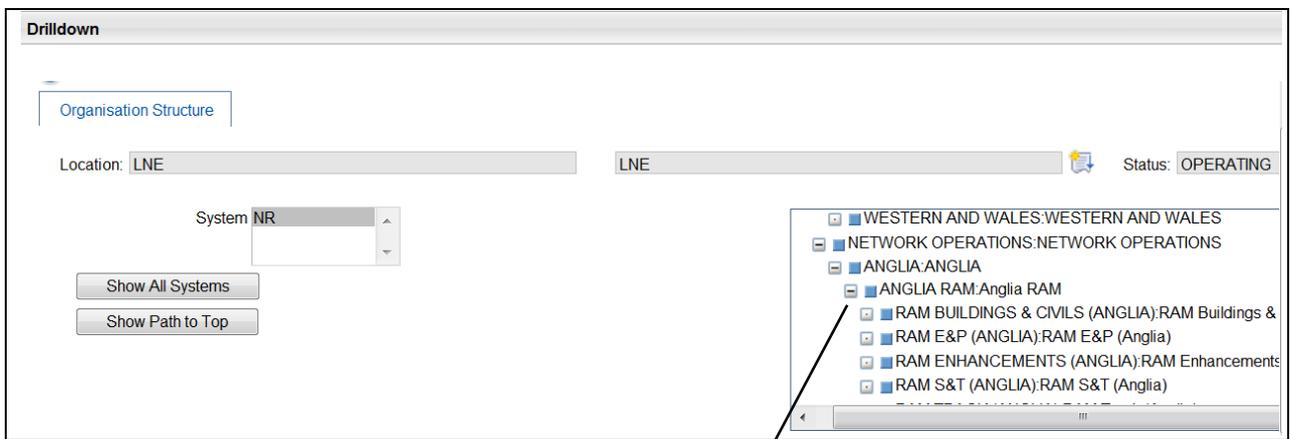
To assign the close call against a project, click on the >> icon next to the mandatory 'Involved Project' field, you will have two methods to view the organisation's projects in which to assign to the Close Call record. 'Open Drilldown' is the recommended method when finding and selecting the project.

Figure 6



'Open Drilldown' will open the organisation structure in a hierarchical view and is the easiest way to select the organisation level. To select the appropriate level of organisation or project involved in the close call, click on the **blue square** to the left of the project name.

Figure 7



The project information will populate the relevant fields.

Figure 10

Organisation Detail

* Event Date: 10/11/14 09:45

* Involved Project: DELIVERY UNIT B >> Delivery Unit B

NR Project Name: NON PROJECT/CONSTRUCTION ACTIVITY

NR Region/Programme: NOT APPLICABLE

NR Route/Area:

NR Delivery Unit:

NR Local Operations Manager:

NR Function:

2.3.3 Category and Causes

There are a number of categories available to classify the close call event. To open the list of Categories, click on >> and select 'Classify'

Figure 11

Category and Causes

Please select a Category with What Could Have Happened

* Category:

Sub Category:

Primary Causes Human Factors:

Environmental Contributing Factors:

Classify

Clear Classification

The list of categories and sub-categories are merged into one list. Expand each category by clicking on the + to the left of the category name, and then select the most appropriate sub-category by clicking on the blue square next to the sub-category text (see Fig. 12).

Figure 12

- + RAIL VEHICLES:Rail Vehicles
- + RAILWAY OPERATIONS:Railway Operations
- + ROAD VEHICLES:Road Vehicles
- + SAFE SYSTEMS OF WORK (SSOW) PLANNING:Safe Systems of Work (SSOW) Planning
- SITE WELFARE, SITE HOUSEKEEPING:Site Welfare, Site Housekeeping
 - SLIP/TRIP HAZARDS ON SITE:Slip/trip hazards on site
 - SUFFICIENT WELFARE:Sufficient welfare
 - TIDINESS/CLEANLINESS:Tidiness/cleanliness
- + SUBSTANCES HAZARDOUS TO HEALTH:Substances Hazardous to Health
- + THIRD PARTY INTERFACE:Third Party Interface

If selecting the Category '**Other**', an additional text box will appear for you to describe the category you are entering (see figure 14).

Figure 13

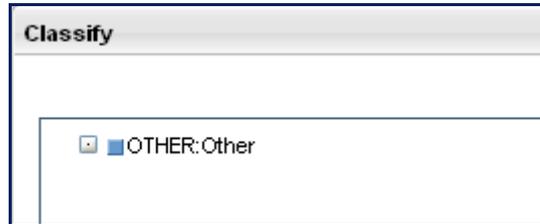
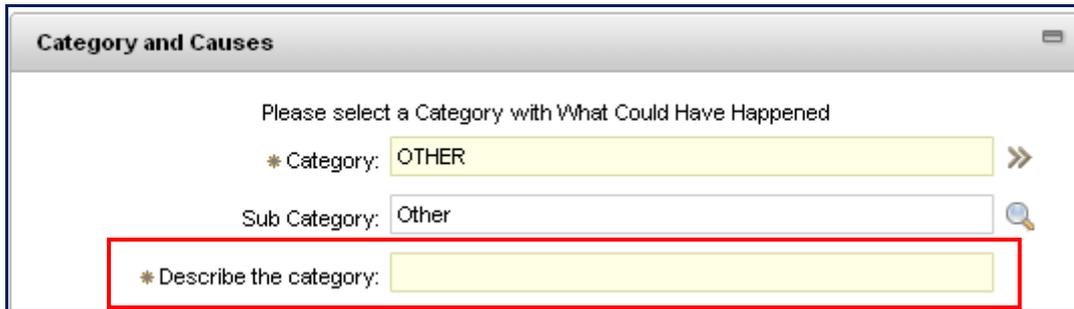
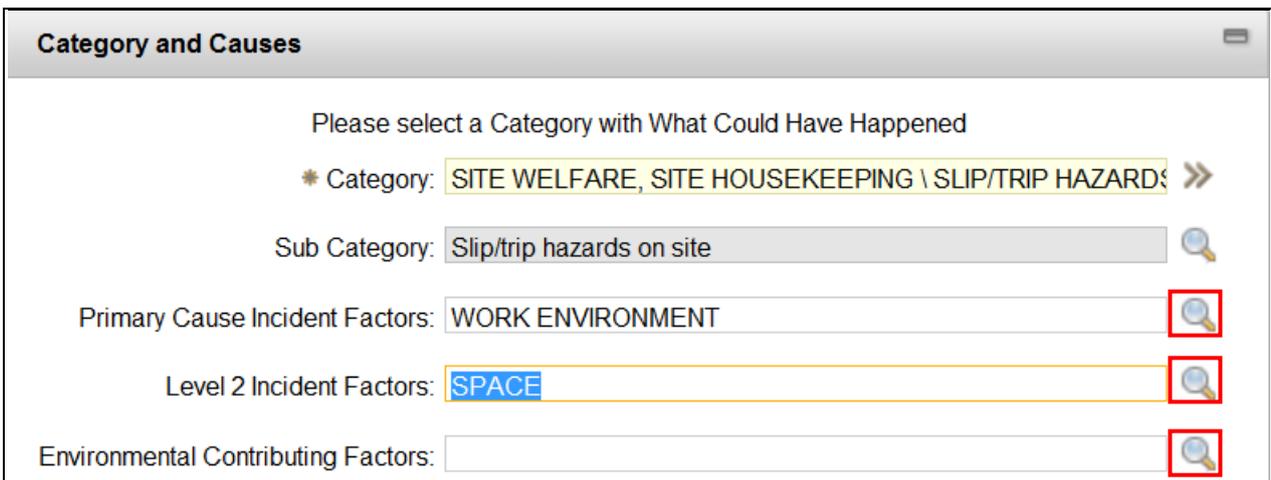


Figure 14



Complete the remaining optional fields (Primary Causes Incident Factors, Level 2 Incident Factors and Environmental Contributing Factors) by clicking on the spy glass and selecting from the list of options (see **Primary Cause Factors Guide** under the miscellaneous menu on the CCS help site for more information).

Figure 15



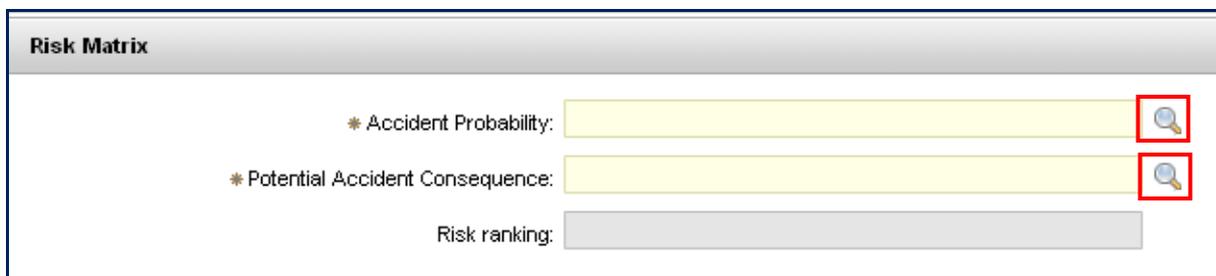
2.3.4 Risk Matrix

The Risk Matrix fields are mandatory for the close call inputter to determine the level of risk from an accident probability and potential consequence point of view. There is a High, Medium, Low and Negligible option for each field. Click on the spy glass and select a level of risk for Accident Probability and Potential Accident Consequence of the close call event.

Accident Probability: Was the probability of an accident taking place high, medium, low or negligible.

Potential Accident Consequence: Would the outcome/consequence if an accident had occurred be high, medium, low or negligible.

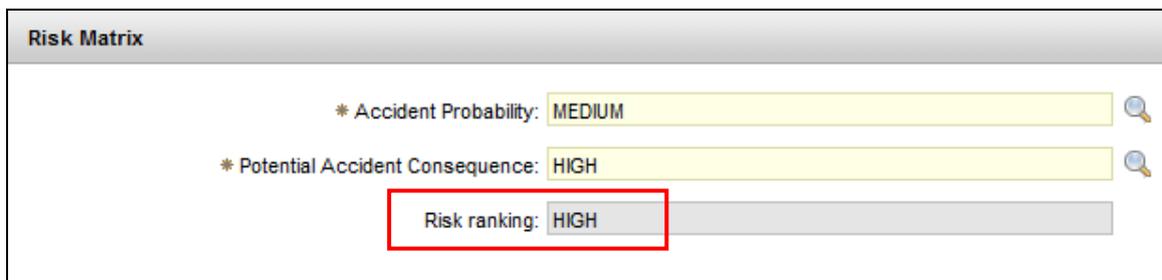
Figure 16



The screenshot shows a form titled "Risk Matrix". It contains three input fields. The first two are labeled "Accident Probability:" and "Potential Accident Consequence:", both with a yellow background and a magnifying glass icon on the right. The third field is labeled "Risk ranking:" and has a grey background. The magnifying glass icons are highlighted with red boxes.

Based on the rankings entered in each field, the risk ranking will be auto-populated.

Figure 17



The screenshot shows the same "Risk Matrix" form. The "Accident Probability:" field now contains the text "MEDIUM" and the "Potential Accident Consequence:" field contains "HIGH". The "Risk ranking:" field is now auto-populated with "HIGH" and is highlighted with a red box.

If the risk ranking is high, the close call must be processed to a Responsible Manager (RM) to review before the event can be closed.

2.3.5 Other Detail

Additional data is required in the 'Other Detail' section. Click on the spy glass next to each field for a list of options to pick from.

Figure 18

The screenshot shows a form titled "Other Detail" with the following fields:

- Asset Type: TRACK/P-WAY
- * Trackside or Non Trackside: TRACKSIDE
- * Trackside / Non Trackside Location: FOOTPATH
- Other Location Info (ELR/Mileage etc):
- Other involved Organisation/s:
- * Can the event be closed at source: NO

Red boxes highlight the spy glass icons on the right side of the form, indicating that these fields are searchable.

Figure 19

The close-up shows the field: * Can the event be closed at source: NO. A red box highlights the spy glass icon next to the field.

Can the event be closed at source?

This field requires the person creating the close call to indicate if the close call has been dealt with and therefore can be changed to 'CLOSED' status, or if there are still outstanding actions to correct the safety issue.

The field states 'No' by default however it can be changed to 'Yes' if no further action is required. By marking it 'No' the close call record will be sent to the Responsible Manager for review and allow them to enter follow up actions which may be required to close the record.

2.3.6 Additional Detail Tab

The bottom sections of the Close Call Event are all optional. The fields may be used to log information about the person reporting the close call.

Figure 20

The screenshot shows a form titled "Additional Information" with the following fields:

- Lone worker?
- Reported by: OPERATIVE
- Was the Event Outdoors: YES
- Close Call Age: 0-7 DAYS

Reported by: Click on the spy glass and pick from the appropriate value in the list (see fig. 21).

Figure 21

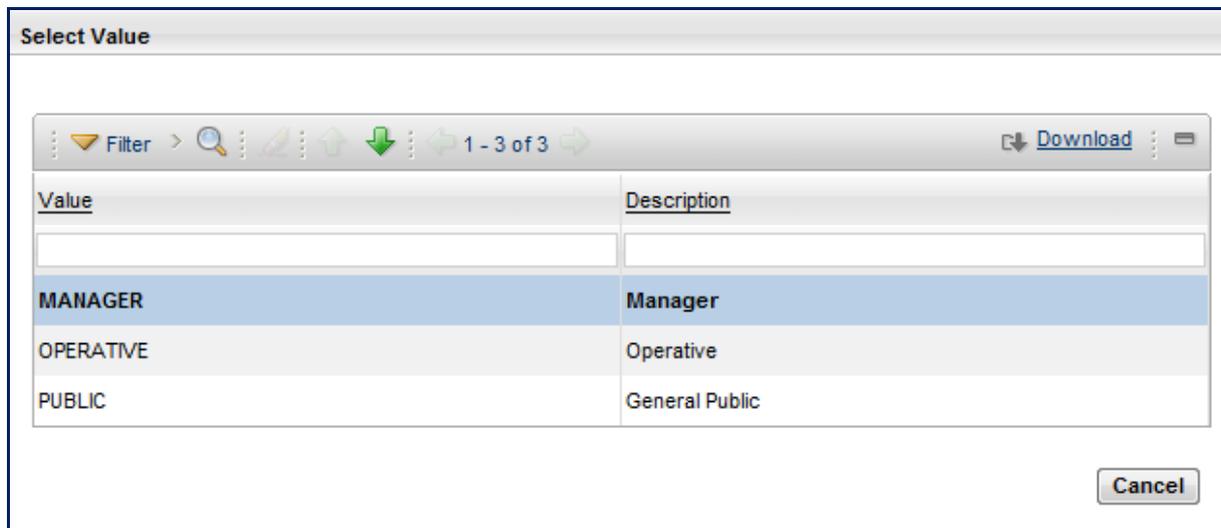


Figure 22

The appropriate Network Rail Control can be picked from a list by clicking on the spy glass.

If applicable, which Network Rail Control has this been reported to: 

2.3.7 Organisation Specific Detail Tab

These fields may be used to input details of the person reporting the close call and whether they require feedback.

Figure 23

<p>Reporters name: <input type="text"/></p> <p>Reporter's contact details: <input type="text"/></p> <p>Does the reporter require Feedback? <input type="checkbox"/></p> <p>Person responsible for providing feedback: <input type="text"/></p> <p>SMS Text Address: <input type="text"/></p>	<p>Actions required: <input type="text"/></p> <p>Date scheduled for completion: <input type="text"/> </p> <p>Date completed: <input type="text"/> </p>
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Figure 24

Organisation Specific Detail

Reporters name: Tammy

Reporter's contact details: 07712 345678

Does the reporter require Feedback?

Person responsible for providing feedback: Joe Bloggs

SMS Text Address: +447712 345678.CLOSECALLAPP@PAGEONECONNECT.COM

If the reporter of the close call would like to receive text messages relating to the progress of the close call event, their name and a valid mobile telephone number must be entered into the 'Reporter's contact details' box, and tick the 'Does the reporter require Feedback?' tick box.

Figure 25

Actions required: Sleeper to be removed from walkway and for signs to notify staff not to leave items that can cause a tripping hazard

Date scheduled for completion:

Date completed:

The reporter can enter the actions that they think are required into the 'Actions required' box, and use the date fields if required.

If you are a Responsible Manager, there will be an additional tab in the close call event which you are required to complete. Please see Guidance Note 'Responsible Manager – Processing & Completing Close Calls' for details on how to complete the Responsible Manager section.

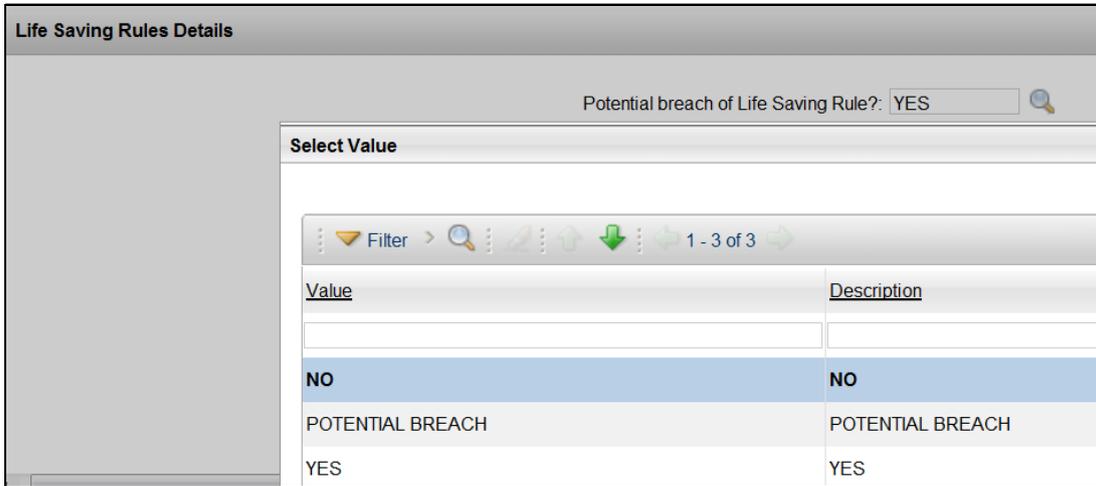
2.3.8 Life Saving Rules

The Life Saving Rules are a Network Rail initiative to ensure everyone takes personal responsibility for maintaining safe behaviour. Go to: <http://www.safety.networkrail.co.uk/Commitment-and-Rules/Lifesaving-Rules> for further information.

The Life Saving Rules tab in the close call event is mandatory and must be completed.

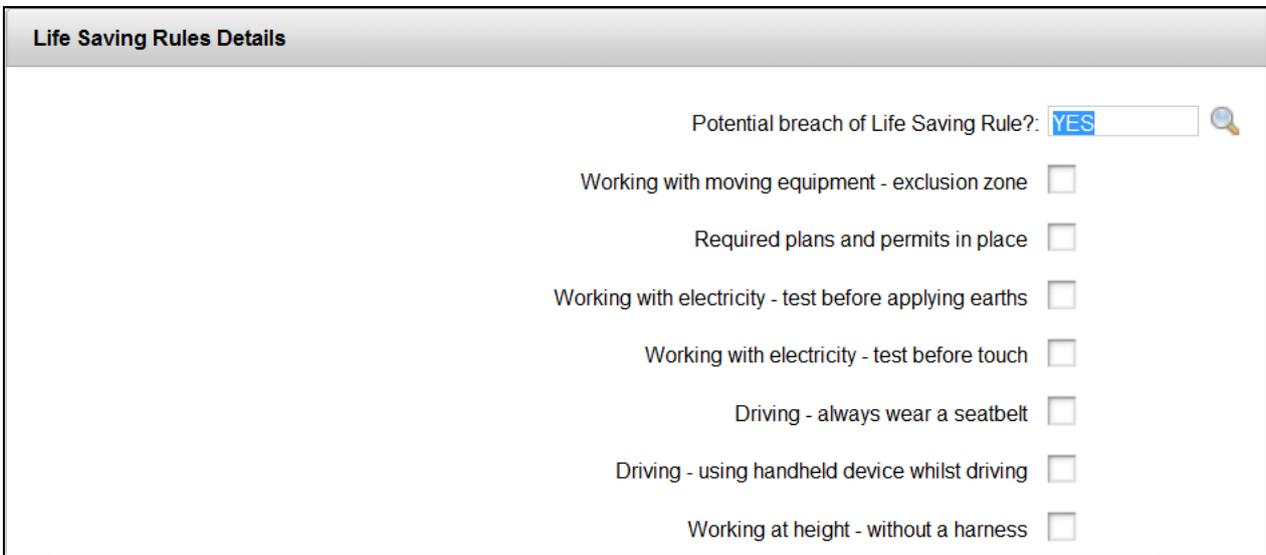
Potential breach of Life Saving Rule? Must be marked as either 'Yes', 'No' or 'Potential Breach' (see figure 26)

Figure 26



If it is marked that a lifesaving rule has been breached, the relevant tick box should be selected.

Figure 27



If you are a Responsible Manager, please see Guidance Note 'Responsible Manager – Processing & Completing Close Calls' for details on how to complete the Responsible Manager section.

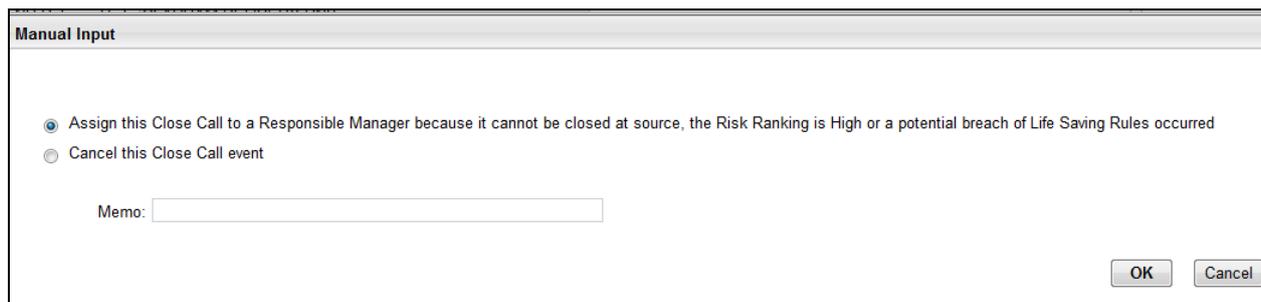
2.3.9 Processing the Close Call Record

On the top menu bar of the close call record click on the  icon to process the close call.

If one or more of the following criteria are met by the close call event, the close call will be sent to a Responsible Manager for review -

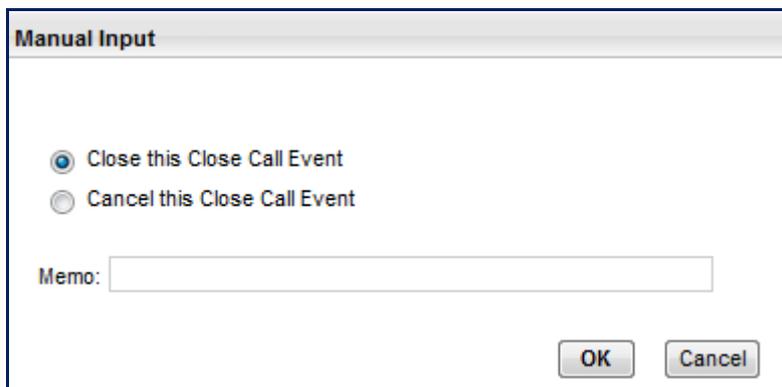
- 1. Risk Ranking is 'High'**
- 2. 'Can the event be closed at source' is marked 'No'**
- 3. Potential Breach of Life Saving Rule? Is marked 'Yes' or 'Potential Breach'**

Figure 28



If the 'Can the event be closed at source' is marked as 'Yes', the risk ranking is not 'High', and there is no breach to a lifesaving rule, the close call event can be closed without an RM's review.

Figure 29



There is an option on both pop up messages to **cancel** the event and also type a memo.

For guidance on processing a Close Call Record as a Responsible Manager, please see guidance note 'Responsible Manager - Processing & Completing Close Calls – Network Rail Only'.

Please contact the CCS Support Team on closecall.enquiry@rssb.co.uk if require any further information or advice.