Responsible Manager – Processing & Completing Close Calls

1 Introduction

Users assigned the role of **'Responsible Manager' (RM)** are required to check and process close calls that are marked as 'high risk' or are not 'closed at source' (i.e. the event reported requires follow up to ensure action has been taken by the appropriate person).

The RM will receive an email notification for all close calls escalated for review. They will also see events awaiting review on their Start Centre. The calls shown in the RM's Start Centre will be for events assigned to their level of the organisation hierarchy and <u>any levels lower</u> in the hierarchy that do not have an RM assigned to it.

Note: <u>RM's should only review calls that are at their level of the hierarchy.</u> If an RM opens a call at a lower level of the hierarchy that is not theirs to review, the event becomes locked to them and the RM who should review the event will not be able to process the record

2 Reviewing & Completing a Close Call

2.1 RM review email notification

When a close call event is entered that is assigned to a particular project (or level of the organisation hierarchy), the RM (or RM's if more than one) assigned to that project will receive notification via email. The email includes the following information:

- Event Date
- Event Location (this is an optional field in the event screen, and therefore will only hold information if completed)
- Risk Ranking
- Event Description
- Action Taken (which is from the 'What were you able to do about it' field)
- Hyperlink to the close call event - *If the RM is not already logged into CCS when clicking on this link, they will be required to enter their login credentials before they are taken to the event screen.*

Example of Responsible Manager notification email:

Close Call ID 87326 has been assigned to you for Responsible Manager review.

Event Date: 12/8/14 1:15 PM
Event Location:
Project/Division: AREA DIRECTOR Z
Risk Ranking: HIGH
Event Description: Contractor observed climbing a condemned lighting tower without any fall arrest equipment, risking a fall from height.
Action Taken: Contractor told to get a harness before continuing work. Briefing required with all contractors to inform them of the importance of PPE at all times.

Please log on to the Close Call System <http://129.35.145.28/maximo/ui/?event=loadapp&value=CLOSECALL&uniqueid=343163> and complete required actions for this event.

2.2 Viewing a Close Call awaiting RM Completion via Start Centre

If the RM does not use the email to review the event, they can access the event via the Start Centre. The portlet called '**My Organisations Close Calls Awaiting Responsible Manager'** shows all close call events that require RM completion for the organisation project level that the RM is assigned to in the hierarchy or lower.

The event will be colour coded based on the number of days since the event was reported.

Figure 1

Close Call Number	Involved Project	NR Programme/Region	NR Route/Area	Reported Date	Close Call Age	Risk Ranking
74783	AREA DIRECTOR X	NOT APPLICABLE		03/11/14 16:20	8-14 DAYS	HIGH
74796	AREA DIRECTOR Z	NOT APPLICABLE		04/11/14 11:43	0-7 DAYS	HIGH
74778	AREA DIRECTOR Z	NOT APPLICABLE		03/11/14 10:09	8-14 DAYS	HIGH
74748	AREA DIRECTOR Z	NOT APPLICABLE		29/10/14 13:35	8-14 DAYS	HIGH
74729	AREA DIRECTOR Z	NOT APPLICABLE		29/10/14 12:01	8-14 DAYS	HIGH
74740	AREA DIRECTOR Z	NOT APPLICABLE		29/10/14 13:10	8-14 DAYS	HIGH
74801	AREA DIRECTOR Z	NOT APPLICABLE		05/11/14 11:19	0-7 DAYS	LOW
74745	AREA DIRECTOR Z	NOT APPLICABLE		29/10/14 13:21	8-14 DAYS	HIGH
74736	AREA DIRECTOR Z	NOT APPLICABLE		29/10/14 13:03	8-14 DAYS	HIGH
74735	DELIVERY UNIT B	NOT APPLICABLE		29/10/14 13:02	8-14 DAYS	HIGH

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Note: Events that are awaiting RM 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.

2.3 Completing a Close Call Record

The RM should review the event information and what was done about it. They should check that the fields have been correctly input (i.e. the correct event category/sub category has been selected, the location is correct etc.)

2.3.1 Organisation Specific Detail

When a close call is entered, the reporter has the option to request feedback on the progress of the close call. If they do, their name and telephone number or email address will be entered into the relevant fields, and the 'Does the report require Feedback?' box will be ticked.

Figure 2

Organisation Specific Detail

Reporters name: Philip Smith
Reporter's contact details: Philip@hh.com
Does the reporter require Feedback? ☑
Person responsible for providing feedback: Responsible Manager
SMS Text Address: +44PHILIP@HH.COM.CLOSECALLAPP@PAGEONECONNE(

Note: The information entered into the 'RM – Actions required' in the Responsible Manager Detail tab does not get sent as feedback automatically to the reporter. The RM must contact the reporter directly through either email or telephone.

2.3.2 Responsible Manager Detail

This section is to be completed by the RM to enable them to describe what has been done about the close call and to record completion dates etc.

Figure 3
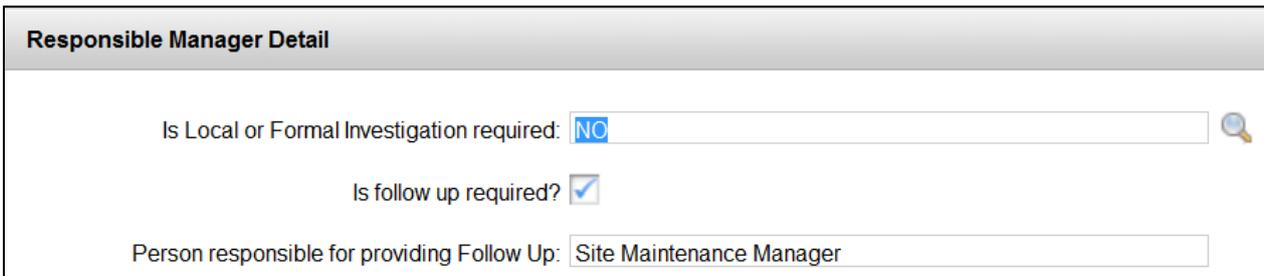
Is Local or Formal Investigation required? The RM can detail whether a local or formal investigation is required based on the information given in the Close Call. Click on the spyglass to view the options.

Is follow up required? This is a tick box to show whether someone is required to follow up on the close call event (this is an optional field).

Person responsible for providing Follow Up: This will allow the RM to assign the close call record to an individual who will be required to conduct a follow up. *This record is not sent to the person named in this field; therefore, it is the RM's responsibility to notify the individual responsible for providing a follow up that they have been assigned this task.*
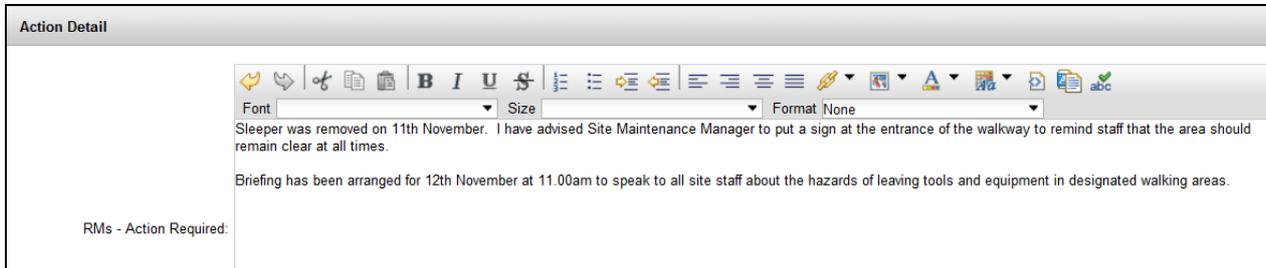
Figure 4
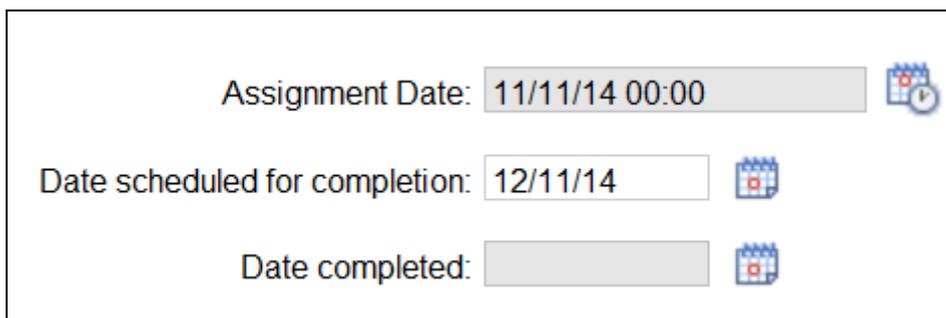
Assignment Date: This field is read-only and pre-populated with the date that the RM completes the Responsible Managers Detail section.

Date scheduled for completion: This is input by the RM, and is the deadline date by which any actions should be completed.

Date Completed: This field is read-only. The date in which the RM processes the close call record for completion is entered into this field by the system.

The information entered into the **'RM - Actions required'** box within the **'Responsible Manager Detail'** tab can be copied and sent to the reporter (if feedback has been requested). **Note: this information is not sent automatically to the reporter.**
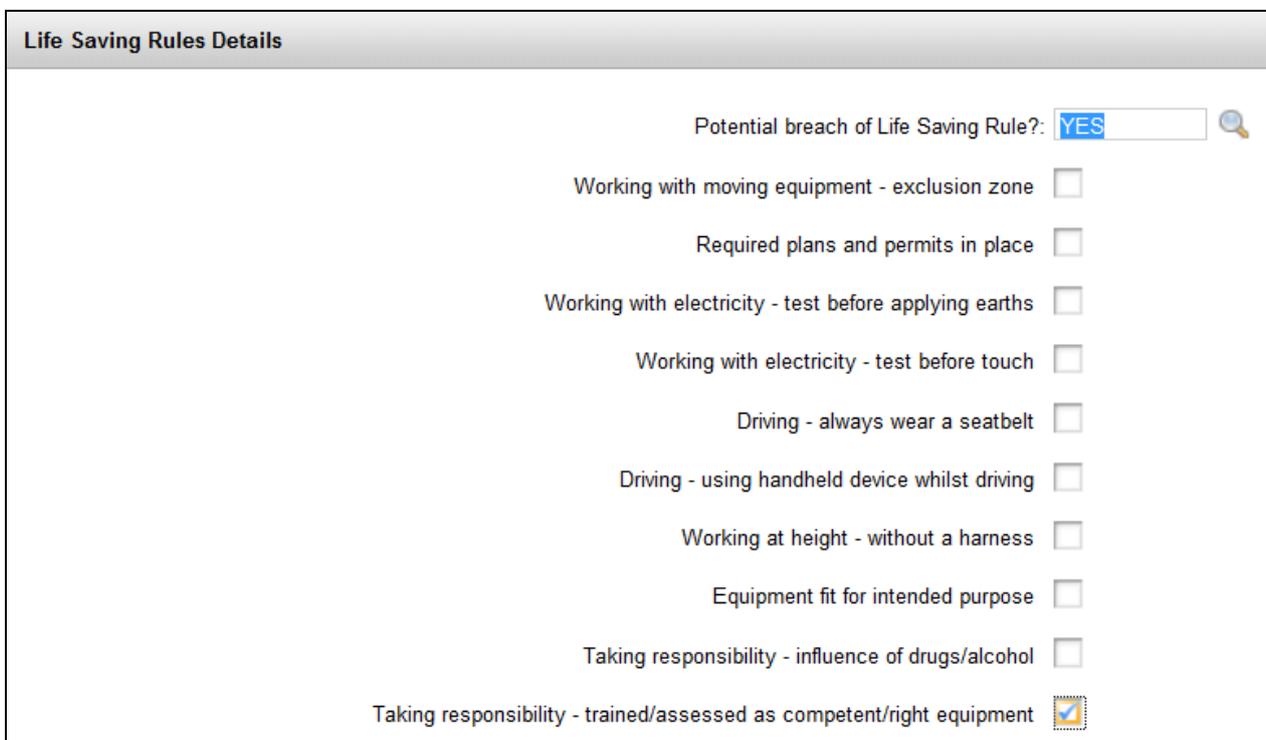
Figure 5

Action Detail	
	Font ▼ Size ▼ Format None ▼
	Sleeper was removed on 11th November. I have advised Site Maintenance Manager to put a sign at the entrance of the walkway to remind staff that the area should remain clear at all times.
	Briefing has been arranged for 12th November at 11.00am to speak to all site staff about the hazards of leaving tools and equipment in designated walking areas.
RMs - Action Required:	

2.3.3 Lifesaving 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 is optional for non-Network Rail users.

If 'Potential Breach' has been selected, you must review the record and determine whether there was a breach of the lifesaving rules, and adjust the 'Potential Breach of Life Saving Rule' box to either YES or NO. If YES is selected, ensure the correct lifesaving rule has been selected.
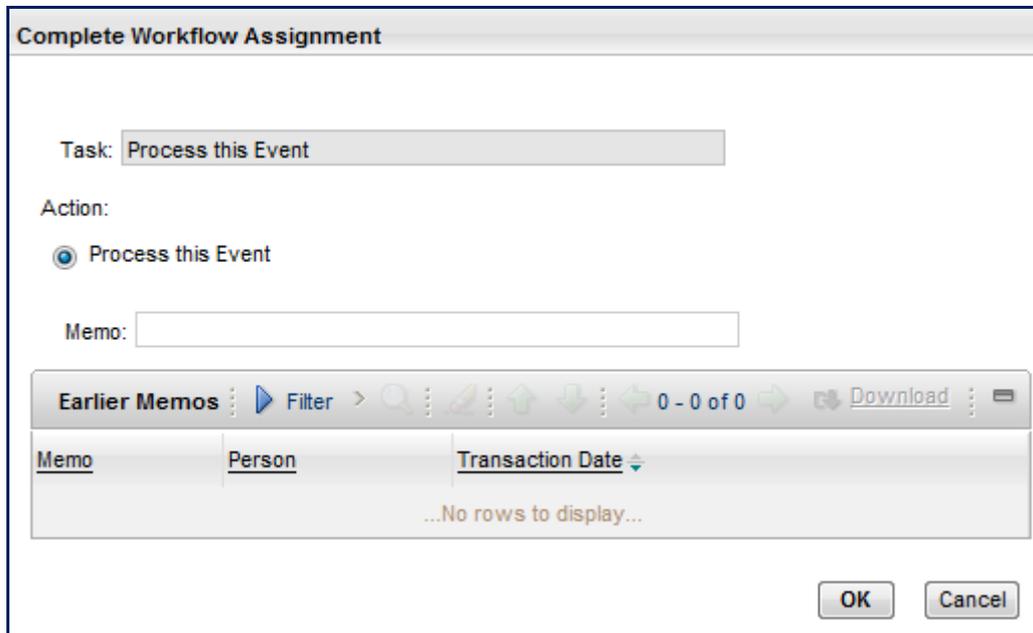
Figure 6

2.3.4 Completing a Close Call

Following completion of the Responsible Manager Detail section, the RM can process and complete the Close Call record. This is done by clicking on the ![process icon] process icon on the top menu bar.
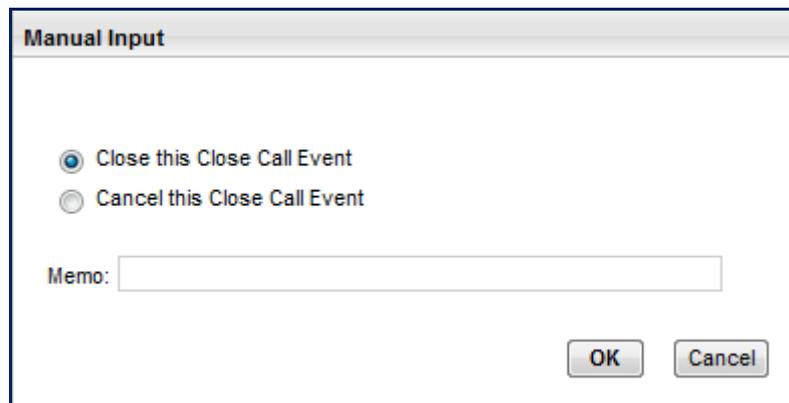
Figure 7

A pop up will appear. Click on **'OK'** to confirm the event can be processed.

Figure 8

The RM can close or cancel the close call by selecting the appropriate radio button and clicking 'OK'.

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