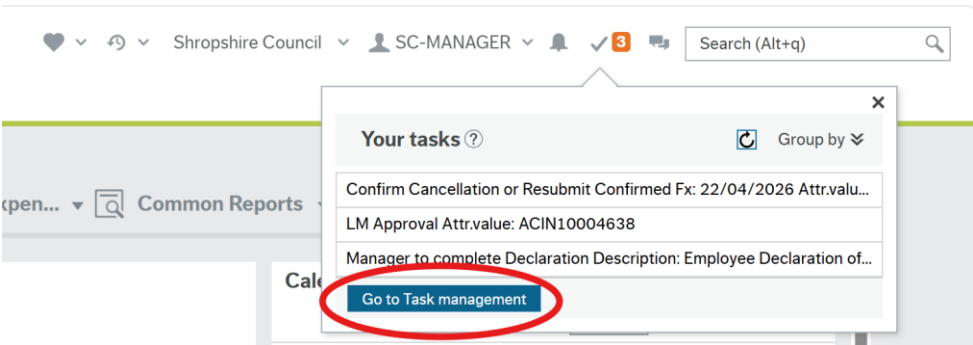
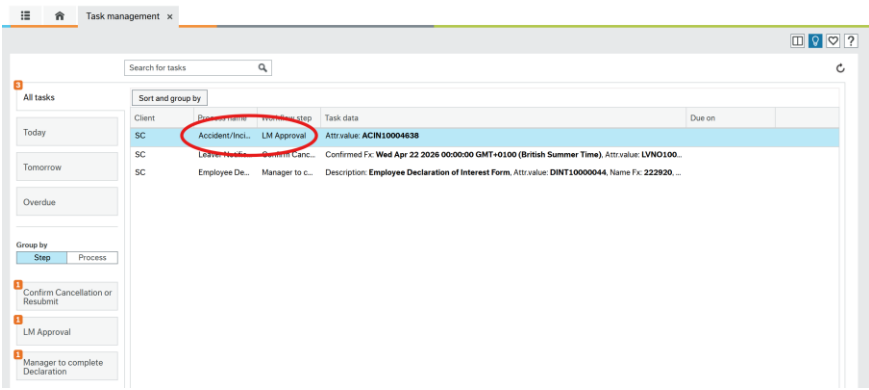


How to authorise an Incident Form in the ERP

		Last Updated
1	Scope: This guidance is to show you how to authorise an Incident Form in the ERP.	28.07.2026
2	Introduction: The following guide provides information on how to authorise an Incident Form that has workflowed to you as a task in the ERP.	28.07.2026
3	Navigate to Main Menu > Common > Task management	28.07.2026
4	Step by step process (with videos and screenshots)	
4.1	If you are a line manager or designated to authorise Incident Forms, then you will receive a task through the ERP if a member of your staff reports an incident. 	28.07.2026
4.2	Go to Task management and click into the LM Approval task to access the completed form. 	

4.3 Scroll down and check through all the details on the **Incident Details** tab.

4.4 If you are not happy that the form has been completed correctly or with enough detail, you need to click **Reject**, enter your comment and select **Reject** to workflow the form back to the initiator so they can add additional detail.

4.5 If you are happy with the **Incident Details**, click on the **Authorisation** tab.

- 4.6 You need to add a comment in the **Further Details** box even if it is just to confirm that no further action is needed.

Incident Details Authorisation

This form is the approved Incident Form for recording all types of Accidents, Incidents or Near-Misses so that these can be recorded, investigated and appropriate remedial action undertaken. Colleagues are particularly reminded to report any form of harassment – whether this is racist, homophobic or sexual – by completing an incident form in a timely manner. Please do take care of yourself, talk to your manager (or an HR Adviser), and access support via the [Wellbeing Pages](#) should you need it.

Further Details

IMPORTANT: Further comments about incident/accident including steps to prevent re-occurrence must be entered. The form will be rejected if they are not.

Further Details

Please add any comments here and if no further comment needed, please confirm that here too, do not leave blank otherwise the form will be rejected back to you

- 4.7 You then need to select **Yes** to the authorisation statement to confirm that you have read through and agree with the incident details otherwise the form will be sent back to you. You can then select **Approve** to workflow the form to the Health & Safety team.

Authorisation

IMPORTANT: Completion of both the Further Details and the Authorisation sections of this tab is mandatory. The form will be rejected if they are not completed.

Authorisation

I give authorisation that the details on this form are correct to the best of my knowledge

Answer

Yes

Date Completed

Date Completed

28/07/2026

Approve Reject Clear Log book Export

5	Related Video Links	28.07.2026
	• Authorising an Incident Form • How to use Task Management	