

The incident workflow

How incidents work in BondiByte: the Incidents page, types, severities, statuses, follow-ups, who can do what and the notification switches.

WHO IT IS FOR Owner, Admin, Manager, Compliance Officer	TIME NEEDED About 12 minutes	LAST REVIEWED 2 October 2026
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Who this is for

Permissions: You need the Can view incidents permission to open the Incidents page. Recording an incident needs Can create incidents, and changing a status, editing or deleting needs Can edit incidents. Owners, Admins, Managers and Compliance Officers have all three by default. If your access is limited to certain sites, you only see the incidents linked to your own sites.

Before you begin

- Incidents is available to your organisation and has no switch of its own in Settings or Configuration. If **Incidents** is missing from your left menu, your role does not include **Can view incidents**: ask an Owner or Admin. If the page says **Incidents are not enabled for your organisation** (a banner may also say **Your plan does not include this feature.**), your organisation's subscription is not active. An Owner or Admin checks **Billing & subscription** and contacts BondiByte support if it is active.
- Reminder and alert emails about incidents need three things to be on. An Owner or Admin turns on **Automation Centre** and **Incident escalation automation** under **Automation & Capacity Controls** in **Account settings**, and **Incident follow-up notifications** in the **Automation Centre**. See the section on reminders and notifications below.
- Your organisation's own incident forms are optional. They are forms published in the **Incident** category. See Create or clone a form and Publish a form.



What Incidents is for

Incidents is the register where your organisation records incidents: what happened, when and where, who was involved, what was done straight away and what follow-up is needed. Each incident is one record with a type, a severity, a status and an incident number.

BondiByte keeps the record. It does not report an incident to the NDIS Commission, to the police or to anyone else outside your organisation, and it does not decide whether an incident has to be reported. Your organisation remains responsible for responding to an incident and for any reporting it must do.

If someone needs urgent help, call emergency services first and record the incident afterwards. Incidents is a record keeping tool, not an emergency service.

- Record an incident
- Review an incident

How an incident gets into the register

An office user records it. An Owner, Admin, Manager or Compliance Officer chooses **Add incident** on the **Incidents** page and fills in the standard form, **Incident report (standard)**. This is the main route, and Record an incident walks through it.

Your organisation's own incident forms. If your organisation has built and published a form in the **Incident** category, **Add incident** first opens the **Choose incident type** window, which lists the standard form under **BondiByte templates** and your own forms under **Organisation templates**. A person who chooses one of your own forms picks the **Client**, answers the form's questions and chooses **Record incident**. The window then confirms **Incident recorded**. These records are listed in the **Incident form records** section lower on the **Incidents** page, with the columns **Date**, **Title**, **Incident type**, **Client**, **Created by** and a **View** button. They are not part of the main register, so they do not count in the four tiles and they have no status or severity of their own. The **Choose incident type** window only appears for people who can also create reports (the **Can create notes** permission).

A staff member writes an Incident report in the Staff App. That is a report, not an incident in the register. It is listed with your other reports. A manager who wants it on the register records it with **Add incident**.

A draft prepared from a shift report. This needs AI-assisted features to be switched on by an Owner or Admin: **AI-assisted features** under **Account settings** > **Automation & Capacity Controls**, and **Potential incident detection** and **Incident report drafting** under **Configuration** > **AI Settings**. Once they are on, a manager can confirm a possible incident in **Approvals**. The confirmation window says **This does not submit an incident. You will be taken to an incident draft to review and complete**. The **Add incident** window then opens with the line **Draft prepared from a shift report** and the date, and the suggested fields are marked **Suggested from shift report**. Nothing is saved until a person chooses **Create incident**, and checking every field is still their job.

- Create or clone a form
- The Report Library



The Incidents page

In the left menu, under **Registers**, choose **Incidents**. At the top are four tiles. **Total** counts all recorded incidents, including deleted ones. **Open** counts incidents that are not closed yet. **Follow-up** counts the actions still open: incidents that need a follow-up and are not closed. **High risk** counts the **High** or **Critical** incidents that are not closed. The tiles always count all your incidents, whatever you type in the search box or choose in the lists.

Below the tiles is the register toolbar. It has a search box (**Search incidents...**) that looks at the incident number, the summary, the description, the client's name and the site's name. Next are a status list (**All statuses**, **Open**, **In review**, **Follow-up required**, **Closed**, **Cancelled**) and a severity list (**All severities**, **Low**, **Medium**, **High**, **Critical**). **Include inactive** also lists incidents that were deleted from the active register. **Add incident** starts a new record.

The register lists the newest incident date first. Its columns are **Incident** (the summary, which opens the **Review incident** window, with the incident number and any **Follow-up due** date under it), **Incident type**, **Record** (the client and the site, or the site or location when there is no client), **Date**, **Status** (**Active** or **Inactive**, and the severity) and a three dots menu with **Review**, **Edit** and **Delete**. A pager under the register has a **Rows** list and **Back** and **Next** buttons. When nothing matches your search, the register says **No matches for** followed by what you typed, with a **Clear search** button. A brand new organisation sees **No incidents yet** and **Add an incident to get started**.

The screenshot displays the 'Incidents' page. On the left is a dark sidebar with a menu. The top right shows a user profile for 'Demo User' from 'Demo Organisation'. The main area features four summary tiles (Total, Open, Follow-up, High risk) labeled with a circled '1'. Below these is a toolbar with an 'Incidents' button, a search box 'Search incidents...' (labeled with a circled '2'), dropdowns for 'All statuses' and 'All severities', an 'Include inactive' checkbox (labeled with a circled '2'), and an 'Add incident' button (labeled with a circled '3'). The central part is a table of incidents (labeled with a circled '4') with columns: INCIDENT, INCIDENT TYPE, RECORD, DATE, and STATUS. The table lists three incidents: a fall, medication delay, and an unlocked door. Each row shows details like client name, site, date, and status (Active) with a severity level (Low or Medium). A three-dot menu is visible at the end of each row.

INCIDENT	INCIDENT TYPE	RECORD	DATE	STATUS
Minor trip in hallway, no injury (sample record) INC-20261002124236 · Follow-up due 09/10/2026	Fall	CLIENT Avery Sample SITE Willow Park Supported Living House	02/10/2026	Active Low
Medication prompt given 30 minutes late, no effect noticed (sample record) INC-20261002113039 · Follow-up due 08/10/2026	Medication	CLIENT Mo SITE Sunrise Supported Living Home	01/10/2026	Active Medium
Front door found unlocked at handover, nothing missing (sample record) INC-20261002112748	Other	SITE Willow Park Supported Living House	29/09/2026	Active Low

The four tiles (1), the search box, the lists and Include inactive (2), Add incident (3) and the register (4).

- Review an incident



Types, severity and the incident number

Type describes what kind of incident it is: **Medication**, **Behaviour**, **Fall**, **Injury**, **Safeguarding**, **Complaint** or **Other**. A new incident starts as **Other**. The type shows in the **Incident type** column.

Severity says how serious the incident was: **Low**, **Medium**, **High** or **Critical**. A new incident starts as **Low**. The severity shows beside **Active** in the **Status** column, in red for **High** and **Critical**. An incident that is **High** or **Critical** and not yet closed counts in the **High risk** tile, and **High** and **Critical** are the severities that **Incident follow-up notifications** emails managers about.

Incident number identifies the incident. If the person recording it leaves the box empty, BondiByte numbers the incident with a number that starts with INC-. A number that someone types must not already belong to another incident in your organisation.

Date and time is when the incident happened, not when it was typed in. It cannot be more than 24 hours in the future. The register lists incidents by this date.

Statuses and how an incident moves

Every incident has a status, which is separate from **Active** and **Inactive**. A new incident starts as **Open**. The status list in the **Review incident** window has five choices. **Open**: recorded and not yet picked up. **In review**: someone is looking into it. **Follow-up required**: actions are still to be done. **Closed**: finished. **Cancelled**: closed without further work, for example because it was recorded by mistake.

Closed and **Cancelled** both count as closed. A closed incident leaves the **Open**, **Follow-up** and **High risk** tiles but still counts in **Total**, and it stays on the register. Choose **Closed** or **Cancelled** in the status list above the register to find it. **Open**, **In review** and **Follow-up required** do not change any tile.

The statuses do not have to be used in order. A person who can edit incidents opens the incident with **Review**, chooses a status in **Incident status** and chooses **Save status**, or chooses **Close incident** to set **Closed** in one go. **Close incident** does not ask for confirmation, and the incident can be reopened by choosing another status.

Delete is a different action. It removes an incident from the active register, and the incident is then labelled **Inactive**. Tick **Include inactive** to list it again. An inactive incident can still be reviewed and edited, but **Delete** is no longer offered, and there is no button to put it back on the active register.

- Review an incident



Follow-up

The standard form has a **Follow-up required** tick box. Ticking it asks for **Who should follow up**, the staff member who owns the follow-up, and the **Follow-up due date**. Both are required once it is ticked. Unticking it clears both.

A follow-up shows as **Follow-up due** and the date under the incident number in the register and in the **Review incident** window, and the incident counts in the **Follow-up** tile until it is closed.

The **Follow-up required** tick box and the **Follow-up required** status are separate. Choosing the status does not set an owner or a due date, and ticking the box does not change the status. Check both when you review an incident.

When the follow-up reminders are switched on (see the next section), the staff member who owns the follow-up is emailed 24 hours before the due date. The form says so under **Who should follow up**.

Who can see and change incidents

Can view incidents opens the **Incidents** page and the **Review incident** window. **Can create incidents** shows **Add incident**. **Can edit incidents** shows the **Incident status** list, **Save status** and **Close incident** in the **Review incident** window, and **Edit** and **Delete** in the three dots menu. A role with only **Can view incidents** can read every incident it can see and cannot change anything. Owners and Admins have every permission. Managers and Compliance Officers can view, create and edit incidents by default.

To check or change what a role can do, go to **Configuration > Roles & Permissions**, open the role and choose its **Permissions** tab. The incident permissions are in the **Documents** group. See Roles and permissions basics.

If a person's access is limited to certain sites, the register, the four tiles and the **Review incident** window only cover the incidents linked to their own sites, and the client, site and staff lists on the form only offer records they can see. An incident that is recorded with no site is saved but is not listed for them, so a person with limited access should choose a site in **Location** when recording an incident.

- Roles and permissions basics

Reminders and notifications

BondiByte can email people about incidents. Three things must all be on. They are set by an Owner or Admin, in this order.

1. Account settings. Choose your name at the top right, then **Account settings**. Under **Automation & Capacity Controls**, make sure the badge on the **Automation Centre** master switch and on **Incident escalation automation** starts with **Enabled** (for example **Enabled – Not run yet**). If a badge says **Disabled**, choose **Enable**. **Incident escalation automation** allows BondiByte to send incident escalation, follow-up due and severe incident notifications. The card says these use ACU (Automation Capacity Units) when notifications are generated.

2. Automation Centre. In the left menu, under **Administration**, choose **Automation Centre**. On the **Library** tab, in the **Incidents** group, find **Incident follow-up notifications**. It shows **On** or **Off**, with **Turn on** or **Turn off**. If the card shows **Off**, choose **Turn on**. The card says it notifies follow-up owners and



managers about severe incidents, and that it sends follow-up due reminders and high or critical incident notifications using the routing set on the card.

3. The settings on the card. **Who to notify**, **Delivery**, **Additional email recipients** and **Save settings** appear once the card is **On**. **Who to notify** has four choices: **House manager first, staff manager fallback**, **House manager for the client/site**, **Staff manager** and **Both managers when available**. **Delivery** has two: **Immediate email** and **End-of-day email**. **Additional email recipients** takes extra email addresses, written with a comma between them. Choose **Save settings** to keep a change.

The follow-up owner on an incident is emailed 24 hours before the due date, as the form says. The managers' emails depend on **Who to notify**. Whether anyone is emailed does not depend on the **Create incident** button, only on these settings. If your organisation has used up its included automation capacity, these emails are not sent, while recording and reviewing incidents carries on as normal. An Owner or Admin can check the automation usage in **Account settings**.

The screenshot shows the 'Incident follow-up notifications' card. At the top, the title 'Incident follow-up notifications' is followed by a green 'On' toggle (1) and a blue circle with the number 1. Below the title, there is a description: 'Notify follow-up owners and managers about severe incidents.' and 'Sends follow-up due reminders and high/critical incident notifications using the routing below.' There are three buttons: 'CONFIGURABLE' (blue), 'IMMEDIATE EMAIL' (blue), and 'HOUSE MANAGER FIRST, STAFF MANAGER FALLBACK' (yellow). To the right of these buttons are two more buttons: 'Save settings' (5) and 'Turn off' (6). Below these buttons are two dropdown menus: 'Who to notify' (2) and 'Delivery' (3). The 'Who to notify' dropdown is set to 'House manager first, staff manager fallback'. The 'Delivery' dropdown is set to 'Immediate email'. Below these dropdowns is a text input field for 'Additional email recipients' (4), which contains the text 'name@example.com, team@example.com'.

The Incident follow-up notifications card. The On label (1), Who to notify (2), Delivery (3), Additional email recipients (4), Save settings (5) and Turn off (6).

- Navigate BondiByte

Where else incidents appear

On a client's record, the **Reports** tab lists the client's incidents beside their reports. An incident row shows the category **Incident**. Choosing it opens the incident on the **Incidents** page: in the **Edit incident** window if you can edit incidents, or in the **Review incident** window if you cannot.

A notification in the notification bell can link to an incident, and opens it the same way.

In the **Audit Centre**, **Incident register (CSV)** is one of the registers that can be included when an audit is prepared.



What BondiByte does not do

BondiByte does not report an incident to the NDIS Commission, the police, a guardian, a family member or any other person outside your organisation. Recording, reviewing or closing an incident sends none of those reports.

BondiByte does not decide whether an incident is reportable or how serious it is. The person recording it chooses the type and severity, and your organisation decides what has to be reported and when.

There is no notification section on the incident form. The form says to write who was told, and when, in **Description** or **Immediate action taken**.

Important notes

Important: BondiByte keeps your record of the incident and where it is up to. It does not report the incident to the NDIS Commission or anyone else. Your organisation remains responsible for responding to the incident and for any reporting it must do.

Warning: If someone needs urgent help, call emergency services first and record the incident afterwards.

Note: A Staff App Incident report is a report, not an incident on the register. If you cannot find it on the **Incidents** page, look with your other reports.

Good practice

- Record every incident on the register as soon as it is safe to do so, even when a staff member has already written an Incident report in the Staff App. The register is what the **Open**, **Follow-up** and **High risk** tiles count.
- Check the four tiles at the start of each week. A **High risk** count above zero, or a **Follow-up** count that does not fall, tells you which incidents to open first.
- Keep the status up to date as the work moves along, so that the status list above the register shows where each incident is up to.
- Give every follow-up an owner and a realistic due date. The owner is emailed 24 hours before the due date once the notifications are switched on.
- Decide in advance who is told about severe incidents, then set **Who to notify** and **Additional email recipients** on the **Incident follow-up notifications** card to match, and write who was told, and when, in **Description** on the incident.
- Do not delete an incident to correct a mistake. Use **Edit** for a wrong detail, and **Cancelled** for a record that should not have been made.



Questions and answers

Does BondiByte report incidents to the NDIS Commission?

No. BondiByte records the incident and where it is up to. Your organisation decides whether an incident has to be reported and makes any report itself.

What is the difference between the Active label in the register and a status such as Closed?

Active means the incident is on the active register. Closed is one of the five statuses, which show how far the incident has got. A closed incident is still Active, and stays on the register until someone chooses Delete.

Can I change an incident after I have saved it?

Yes. A person who can edit incidents can correct the details with Edit, and change the status in the Review incident window.

Why does an incident that I closed still count in the Total tile?

Total counts every recorded incident, including closed and deleted ones. Only Open, Follow-up and High risk leave out closed incidents.

Incidents is not in my left menu. What should I do?

Your role does not include the Can view incidents permission. Ask an Owner or Admin to check your role in Configuration, Roles & Permissions.

The Incidents page says Incidents are not enabled for your organisation. What should I do?

A banner may also say Your plan does not include this feature. That means your organisation's subscription is not active. An Owner or Admin checks Billing & subscription, and contacts BondiByte support if it is active.

An incident was recorded but nobody was emailed. Why?

Emails about incidents only go out when Automation Centre, Incident escalation automation and Incident follow-up notifications are all on, and Who to notify or Additional email recipients names someone. An Owner or Admin checks the three switches in the order shown in the Reminders and notifications section, and chooses Save settings on the card after any change.

I cannot find Incident follow-up notifications in the Automation Centre.

It sits on the Library tab, in the Incidents group. Choose Incidents in the filter list to show it. If Automation Centre is missing from the left menu, ask an Owner or Admin to check your role.

A form my organisation built does not appear in the Choose incident type window.

The form may not be published, its category may not be Incident, or your role may not be able to create reports. Check the form in the Report Library, as described in the guides on creating and publishing a form, and ask an Owner or Admin to check your role.

Need more help?

Guides: bondibyterobotics.com.au/guides | Support: support@bondibyterobotics.com.au

*Screens show a demonstration organisation with made-up names and may differ slightly as BondiByte is updated.
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