

Record an incident

Record an incident with what happened, who was involved and any follow-up. BondiByte keeps the record. It does not report an incident outside your organisation.

WHO IT IS FOR Owner, Admin, Manager, Compliance Officer	TIME NEEDED About 8 minutes	LAST REVIEWED 2 October 2026
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Who this is for

Permissions: You need the Can create incidents permission to see Add incident, and Can view incidents to open the Incidents page. Owners, Admins, Managers and Compliance Officers have both by default. If your access is limited to certain sites, you only see the incidents at your own sites, and you can only link records you can see.

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. See the Troubleshooting section below.
- You are signed in to BondiByte on a computer.
- You know when and where the incident happened, who was involved and what was done straight away.
- The client, the site and the staff you want to link already exist in BondiByte. See Create a client, Create a site and Staff.
- If you want a follow-up, you know who will own it and the date it is due.
- Optional. If your organisation has built its own incident forms, they were published in the **Incident** category. See Create or clone a form and Publish a form. Without any, the standard form opens straight away.



Steps

1 Go to Incidents > Add incident

- 1 In the left menu, under **Registers**, choose **Incidents**. The **Incidents** page opens, with four summary tiles (**Total**, **Open**, **Follow-up** and **High risk**) above the register of incidents.
- 2 At the top right of the register, choose **Add incident**.

If your organisation has built its own incident forms, the **Choose incident type** window opens next. If it has not, the **Add incident** window opens straight away, and you can go on to step 3.

Permissions: Add incident only appears if your role includes the **Can create incidents** permission. If you cannot see it, ask an Owner or Admin to check your role.

The screenshot displays the 'Incidents' page. On the left, the 'Incidents' menu item is highlighted with a blue circle and a '1' badge. The main content area shows the 'Incidents' page with a top navigation bar, four summary tiles (Total, Open, Follow-up, High risk), a search bar, and a table of incidents. The table has columns for Incident, Incident Type, Record, Date, and Status. Two sample incidents are listed: 'Medication prompt given 30 minutes late, no effect noticed (sample record)' and 'Front door found unlocked at handover, nothing missing (sample record)'. A blue '+ Add incident' button with a '2' badge is visible in the top right of the incident list area.

Choose Incidents in the left menu (1), then Add incident (2).



2 Choose the incident type

The **Choose incident type** window lists the forms you can use. Under **BondiByte templates** is **Incident report (standard)**, the form this guide uses. Under **Organisation templates** are any incident forms your organisation has built.

- 1 Type part of a name in **Search incident types** to narrow the list. If nothing matches, the list says **No incident types match your search**.
- 2 Choose **Incident report (standard)**. The **Add incident** window opens on **Incident Details**.

Note: After you have chosen a form once on a computer, a **Recently used** group appears at the top of the list. Choose **Cancel** at the top right to close the window without starting an incident.

Note: If you choose one of your organisation's own forms instead, a window named after the form opens. Choose the **Client** the incident is about, answer the questions and choose **Record incident**. A message confirms **Incident recorded**. The fields described in the next steps, such as **Severity** and **Follow-up required**, belong to the standard form. See The incident workflow for how your organisation's own forms are kept.

Search for the form if you need to (1), then choose Incident report (standard) (2).



3 Enter the incident details

The first section of the window is **Incident Details**.

- 1 Leave **Incident number** empty so that BondiByte numbers the incident, or type your own reference.
- 2 Choose the **Type** that fits best.
- 3 Choose the **Severity**.
- 4 In **Date and time**, check the date, which starts as today. Then choose the time the incident happened in the list beside it, which starts on **Select time**.

Incident number: Optional. Starts empty, with the hint **Auto-generated if empty**. If you leave it empty, BondiByte gives the incident a number that starts with INC-. A number you type must not already belong to another incident in your organisation. The number is shown under the summary in the register and in the review window.

Type: Required, and always set. Starts as **Other**. Choose **Medication** (a matter involving medication), **Behaviour** (a matter involving someone's behaviour), **Fall** (a fall or a trip), **Injury** (someone was hurt), **Safeguarding** (a concern for someone's safety or wellbeing), **Complaint** (a complaint made by or about someone) or **Other** (anything that does not fit the rest). The type shows in the **Incident type** column of the register.

Severity: Required, and always set. Starts as **Low**. Choose **Low**, **Medium**, **High** or **Critical**. 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 is counted in the **High risk** tile.

Date and time: Required. The date starts as today. The time list works in 15 minute steps on a 24 hour clock, for example 14:30. The date and time cannot be more than 24 hours in the future. They show in the **Date** column of the register and in the review window.

Important: Choose the time yourself. If you leave the time list on **Select time**, BondiByte keeps the time at which you opened the window, not the time the incident happened.

Add incident
Capture incident details, linked records, and follow-up obligations.

Incident Details

1 Incident number
Auto-generated if empty

2 Type
Fall

3 Severity
Low

4 Date and time
02/10/2026 14:30

Leave the incident number empty (1), choose the type (2) and severity (3), then check the date and choose the time (4).



4 Link the people and place

Next is the **People Involved** section. Everything in it is optional, but each link makes the record easier to find and to understand later.

- 1 In **Client**, choose the client the incident is about, or leave **No client**.
- 2 In **Location**, choose the site where it happened. If it happened somewhere that is not a site, choose **Custom address / location** and describe the place in the **Custom location** box that appears.
- 3 In **Shift**, choose the shift that was running, or leave **No shift**.
- 4 In **Staff involved**, choose each staff member who was involved, one at a time. Each person you choose appears below the list with a **Remove** button.

Client: Optional. Starts as **No client**. The list holds the active clients you can see. If the client has a **Linked site / house** on their record, choosing the client fills **Location** with that site. The client's name shows in the **Record** column of the register; an incident with no client shows its site or location there instead.

Location: Optional. Starts as **No linked location**. Choose one of your sites, or **Custom address / location**, which shows a **Custom location** box (**Enter address or location details**). Choosing a site limits the **Shift** list to that site's shifts. If you leave **No linked location**, the **Shift** list shows the shifts at all the sites you can see. Choosing a custom location clears the shift.

Shift: Optional. Starts as **No shift**. Lists the shifts from today and the previous 14 days (the small text under the list says **Only today and the previous 14 days are shown.**), for the site you chose. If no listed shift fits, choose **Custom shift date and time** and fill in **Custom shift date** and **Custom shift time**.

Staff involved: Optional. The list holds the active staff you can see. Under it, **No staff selected.** shows until you add someone. Choose **Remove** beside a name to take that person off. When every staff member has been added, the list says **All active staff selected**.

Permissions: If your access is limited to certain sites, choose a site in **Location**. An incident with no site is saved but is not listed for you afterwards.

The screenshot displays the 'People Involved' section of a form. It contains four numbered callouts: 1. A 'Client' dropdown menu with 'Avery Sample' selected. 2. A 'Location' dropdown menu with 'Willow Park Supported Living Ho' selected. 3. A 'Shift' dropdown menu with 'Afternoon Shift - 02/10/2026 - Wi' selected, and a note below it stating 'Only today and the previous 14 days are shown.' 4. A 'Staff involved' section with a 'Select staff to add' dropdown menu and a list containing 'Jordan Sample' with a 'Remove' button. Below this is a 'What Happened' section with a 'Summary' tab.

Choose the client (1), the location (2), the shift (3) and each staff member involved (4).



5 Describe what happened

The next sections are **What Happened** and **Immediate Response**.

- 1 In **Summary**, type one line that says what happened. This is the only box you must fill in. It is the title of the incident in the register.
- 2 In **Description**, write the facts in order: what happened, where, who was there and what was seen.
- 3 In **Immediate action taken**, write what was done straight away, for example first aid, moving people to safety or telling a manager.

The **Notifications** section is a reminder: write down any notifications, such as who you told and when, in **Description** or **Immediate action taken**.

Summary: Required. One line. It is shown as the incident's title in the register and is searched when you search the register.

Description: Optional. As much detail as you need. It is searched when you search the register, and it is shown in the review window under **What happened**.

Immediate action taken: Optional. What was done straight away. It is shown in the review window under **Immediate response and follow-up**.

The screenshot shows a digital form for recording an incident. It is divided into several sections:

- What Happened**: This section contains two text input fields. The first field, labeled 'Summary' with a blue circle '1' in the top right corner, contains the text 'Minor trip in hallway, no injury (sample record)'. The second field, labeled 'Description' with a blue circle '2' in the top right corner, contains the text 'Sample record for a BondiByte guide. Avery tripped on a loose hallway mat while walking to the lounge room and steadied themselves on the wall. No injury and no pain were reported.'
- Immediate Response**: This section contains one text input field labeled 'Immediate action taken' with a blue circle '3' in the top right corner. It contains the text 'Mat removed from the hallway. Avery checked and comfortable. House lead told.'
- Notifications**: This section is at the bottom and contains a single line of text: 'Record notification details in the description or immediate response while the dedicated notification fields are still being scoped.'

Type a one line summary (1), add the description (2) and the immediate action taken (3).



6 Set the follow-up

The last section is **Follow-up**.

- 1 If the incident needs action later, tick **Follow-up required**. Two more fields appear.
- 2 In **Who should follow up**, choose the staff member who owns the follow-up.
- 3 In **Follow-up due date**, choose the date the follow-up is due.

Follow-up required: Starts unticked. Ticking it shows **Who should follow up** and **Follow-up due date**, and both must be filled in. Unticking it clears them. While an incident is not closed, a ticked follow-up is counted in the **Follow-up** tile.

Who should follow up: Required when **Follow-up required** is ticked. The list holds the active staff you can see. The small text under it says that when the **Automation Centre** toggle is on, this person is emailed 24 hours before the due date.

Follow-up due date: Required when **Follow-up required** is ticked. The date shows as **Follow-up due** under the incident number in the register and in the review window.

Note: If you leave **Follow-up required** unticked, you can still add a follow-up later with **Edit**.

Notifications

Record notification details in the description or immediate response while the dedicated notification fields are still being scoped.

Follow-up

Follow-up required

1

Who should follow up

2

Grace Edwards

When the Automation Centre toggle is on, this person is emailed 24 hours before the due date.

Follow-up due date

3

09/10/2026

Create incident

Cancel

Tick **Follow-up required** (1), choose who should follow up (2) and set the due date (3).



7 Choose **Create incident**

- 1 Check the details you entered. The buttons at the bottom of the window stay in view as you scroll.
- 2 Choose **Create incident**. Choose **Cancel** instead to close the window without saving.

The screenshot shows a form titled 'What Happened' with two sections: 'Summary' and 'Description'. The 'Summary' section contains the text 'Minor trip in hallway, no injury (sample record)'. The 'Description' section contains the text 'Sample record for a BondiByte guide. Avery tripped on a loose hallway mat while walking to the lounge room and steadied themselves on the wall. No injury and no pain were reported.' At the bottom right of the form, there are two buttons: 'Create incident' (labeled with a circled 1) and 'Cancel' (labeled with a circled 2).

Choose *Create incident* (1) to save, or *Cancel* (2) to close the window without saving.

8 Check the new incident

- 1 A message confirms **Incident created**.
- 2 The window closes and the new incident appears in the register, which lists incidents with the most recent incident date first.

The summary is the incident's title. Under it are the incident number and, if you set a follow-up, **Follow-up due** and the date. The **Record** column shows the **Client** and the **Site**, and the **Status** column shows **Active** and the severity.

A new incident starts with the status **Open**. To see or change the status, choose the incident's title. See [Review an incident](#).

If your access is limited to certain sites and you did not choose a site in **Location**, the incident is saved but it does not appear in your register or your tiles. Choose a site in **Location** next time.

The screenshot shows the 'Incidents' register. At the top right, a confirmation message 'Incident created.' is displayed with a green checkmark and a close button (labeled with a circled 1). Below the message are four filter buttons: 'Total' (All recorded incidents), 'Open' (Not closed yet), 'Follow-up' (Actions still open), and 'High risk' (High or critical open records). Below these are search and filter options: a search bar, 'All statuses', 'All severities', an 'Include inactive' checkbox, and an 'Add incident' button. The main table lists incidents with columns: INCIDENT, INCIDENT TYPE, RECORD, DATE, and STATUS. The first incident is highlighted with a circled 2.

INCIDENT	INCIDENT TYPE	RECORD	DATE	STATUS
Minor trip in hallway, no injury (sample record) INC-20261002135931 · 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 confirmation message (1) and the new incident in the register (2).



What happens next

If your access is limited to certain sites, choose a site in **Location**. An incident that has no site is not listed for you afterwards, although it is saved.

The incident is saved with the status **Open**. It counts in the **Total** and **Open** tiles, in **Follow-up** if you ticked **Follow-up required**, and in **High risk** if its severity is **High** or **Critical**.

To read the incident, change its status or close it, choose its title in the register. To correct a detail, open the three dots menu on its row and choose **Edit**. See Review an incident.

Reminders and alerts about incidents are emailed through the **Incident follow-up notifications** card in the **Automation Centre**, which an Owner or Admin switches on and sets up. Whether anyone is emailed depends on those settings, not on the **Create incident** button. See The incident workflow.

Recording an incident does not report it to the NDIS Commission, to the police or to anyone else outside your organisation. Your organisation decides whether an incident has to be reported and makes any report itself.

Important notes

Important: BondiByte keeps your record of the incident. 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. Incidents is a record keeping tool, not an emergency service.

Good practice

- Record an incident as soon as it is safe to do so, while the details are fresh. Enter the date and time the incident happened, not the time you are typing it in, and choose the time from the list. If you leave it on **Select time**, the record keeps the time you opened the window. After you save, check the **Date** column.
- Write the **Summary** so that it makes sense on its own in a list, for example **Minor trip in hallway, no injury**, not **Incident**. **Summary** is the only box you must fill in, and search looks at the summary, the description, the incident number, the client's name and the site's name.
- Set **Severity** honestly. An open **High** or **Critical** incident counts in the **High risk** tile, and it is the kind of incident that **Incident follow-up notifications** emails to managers when an Owner or Admin has switched that on.
- Link the client, the location, the shift and every staff member involved. The links tell a reviewer where to look for related records, and search finds an incident by client name and site name.
- When you tick **Follow-up required**, choose an owner who can do it and a due date that is realistic. The owner is emailed 24 hours before the due date when **Incident follow-up notifications** is on.
- Write who was told and when, such as family, a guardian or a manager, in **Description** or **Immediate action taken**, because there is no separate notification field.
- Do not delete an incident to correct a mistake. Use **Edit** instead. **Delete** removes the incident from the active register, and there is no button to bring it back.



Troubleshooting

Incidents is not in the left menu.

Why it happens: Your role does not include the **Can view incidents** permission.

What to do: Ask an Owner or Admin to check your role in **Configuration > Roles & Permissions**.

The Incidents page says Incidents are not enabled for your organisation. A banner may also say Your plan does not include this feature.

Why it happens: Your organisation's subscription is not active, so the page cannot show the register.

What to do: An Owner or Admin checks **Billing & subscription**, and contacts BondiByte support if it is active.

I cannot see Add incident.

Why it happens: Your role does not include the **Can create incidents** permission. You can still read incidents if you have **Can view incidents**.

What to do: Ask an Owner or Admin to check your role, or to record the incident for you.

A message says Please check the information you entered and try again.

Why it happens: **Summary** is empty. It is the only box you must fill in.

What to do: Type a one line summary, then choose **Create incident** again. The window stays open with everything else you entered.

A message at the top of the window says Choose a follow-up due date when follow-up is required. or Choose who should follow up when follow-up is required.

Why it happens: **Follow-up required** is ticked but **Follow-up due date** or **Who should follow up** is empty. Both are needed.

What to do: Choose the due date and the staff member who owns the follow-up, or untick **Follow-up required** if no follow-up is needed.

A message says an incident with this incident number already exists.

Why it happens: The number you typed in **Incident number** already belongs to another incident in your organisation. Numbers must be unique.

What to do: Clear **Incident number** so that BondiByte numbers the incident, or type a different reference.

A message says the incident date and time cannot be more than 24 hours in the future.

Why it happens: The date in **Date and time** is too far ahead. An incident is a record of something that has already happened.

What to do: Correct the date in **Date and time**, then choose **Create incident** again. The window stays open with everything else you entered.

A client, a staff member or a site I need is not in the list.

Why it happens: The lists show only active records that you are allowed to see. If your access is limited to certain sites, records outside those sites are not listed.

What to do: Check the record is active in **Clients**, **Staff** or **Sites**, or ask an Owner or Admin to check your access. If the incident happened somewhere that is not a site, use **Custom address / location**.

The shift I want is not in the Shift list.

Why it happens: The list only holds shifts from today and the previous 14 days, and only for the site you chose in **Location**. It is also empty if your role does not include the **Can view roster** permission, as is the case for a Compliance Officer by default. Then the list offers only **No shift** and **Custom shift date and time**.

What to do: Check the **Location**, or choose **Custom shift date and time** and fill in the date and time of the shift. If you need shifts to be listed, ask an Owner or Admin to check your role.



The **Add incident** window opened straight away, but I expected a list of forms.

Why it happens: The **Choose incident type** window only appears when your organisation has published incident forms of its own, and you are allowed to create reports.

What to do: Carry on with the standard form. To build your own incident forms, see [Create or clone a form](#).

Need more help?

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

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