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Safety Module Manual V3.3.1

A manual designed to help individuals configure and use the Safety Module

Important Concepts

The Safety Module provides the flexibility to configure and maintain an Incident and Hazard Management System that can vary from being the simple storage of records to the more complex definition of hazards, incident maintenance, licences and committee functions.

This manual defines all the available components and their function, but it is recommended that you discuss your actual requirements and expectations with your EmployeeConnect consultant to determine the best configuration of the Safety Module for your organisation.

The Safety Module uses workflow to send notifications to relevant persons when managing hazards and incidents, based on the incumbents of positions identified as site safety roles. Whenever a hazard or incident is identified, the various safety roles are automatically sent a notification making them aware. It is then up to safety role occupants to assign owners, investigative teams and actions through the various links in the Safety module to manage the hazard or incident. The message content of the workflow emails can be modified to suit your needs. The owner of an incident is, by default, the manager of the person registering the incident in the system. The other roles need to be configured on a location/site basis, depending on your organisational structure.

The roles are as follows:

Owner (All incidents and hazards)

Site Manager (All incidents and hazards)

Site OHS Officer (All incidents and hazards)

Site OHS Manager (LTI Incidents only)

Regional OHS Manager (LTI Incidents only)

LTI represents Lost Time Incident.

Maintenance

Prior to being able to use the Safety Module, there is some configuration work to be done to produce the most effective means of managing the safety activities in an organisation, irrespective of its size.

Safety List Values

Throughout the entire system there are many list values used that can be updated to include the values that are meaningful for your organisation. In the case of the Safety Module, these are best updated through the *OHS List Values* link on the Maintenance tab.

In this example we have selected the EquipmentItem list value. Please note that these items are linked to another list value, EquipmentType, using the Relationship column. Air compressors, for example, is allocated to GE – General Equipment as an Equipment type.

To edit, click the arrow icon. If you want to exclude an item, untick the box in the Active field and save. Use the "+" icon to add new items.

If you are uncertain of the list type, try searching for the Value of one of the options provided on a form. For example, the Hazard Identification form has a field labelled Category this has the standard options: Chemical, Environmental, Occupational. If we search for Value = Chemical, we get several results, with the best match being ID = CH.

Thus, the list type is HazardCategory in this case. Add more items of this type if you need.

Value Contains 'Chemical'			
Edit	**Type**	**ID**	**Value**
→	EquipmentItem	Chemicals	Chemicals
→	ExposureType	Chemical	Chemical
→	HazardCategory	CH	Chemical
→	InjuryAgency	Chemicals	Chemicals
→	InjuryMechanism	Exposure of harmful substances or chemical	Exposure of harmful substances or chemical
→	InjuryNature	Burns - chemical	Burns - chemical
→	OHSMaterial	Aluliquid 20- Caustic liquid wash chemical	Aluliquid 20- Caustic liquid wash chemical

Sites

The Safety module includes additional location type list values: Site, Area, Operating Unit, and Work Group. These location types should have no impact on the organisational structure since they are only operational. The location parent field is used to set the hierarchy. Only organisational locations and sites should be chosen as parents.

This report is initially populated with the locations as defined in the Organisation Module with the ability to then define any number of location types within the parent location.

Use the "New" icon, ⊕, to define a site:

In this example, we are creating a Warehouse site within the Sydney location.

Enter a unique Site ID and then give it a meaningful Site Name. You can leave the ID field empty, and the system will assign an incremented number, starting from 1000.

Enter as much information as needed in the description area.

Enter a start date for this site and any additional comments.

Continue to create sites to enable accurate recording of safety matters.

Areas

To produce more beneficial recording and reporting, it is advantageous to define areas within sites.

To create a new area, use the New icon against the relevant Location and Site:
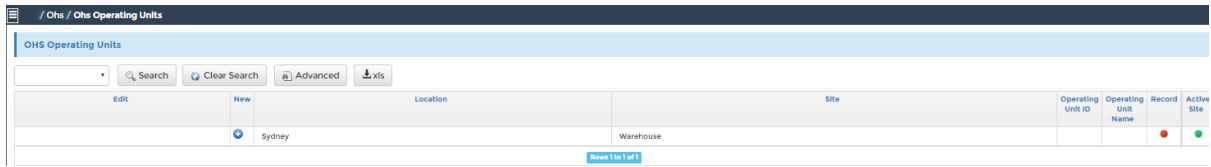

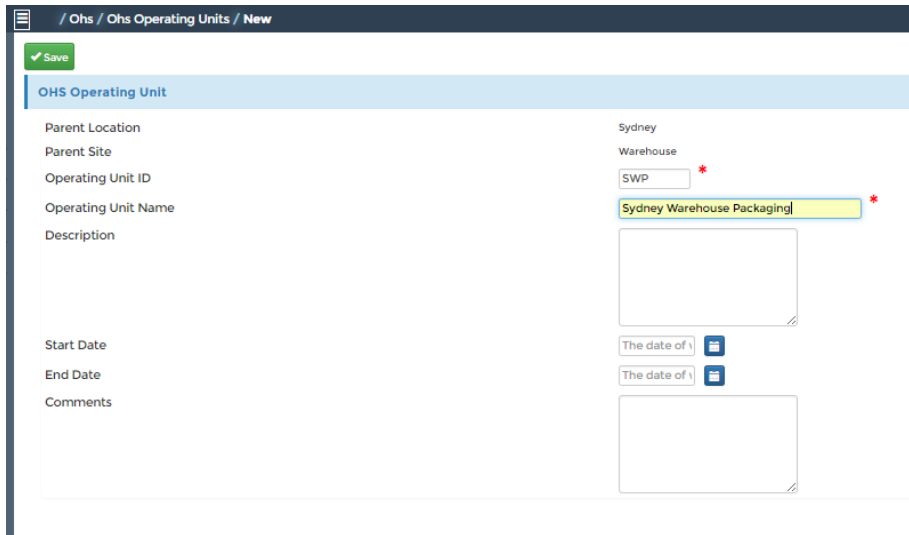In this example, we are creating a Dispatch Area within the Sydney Warehouse.

We have completed only the mandatory fields in this example, but additional information may be entered if it will be useful.

Operating Units

Operating units can be defined and assigned to Sites to further enhance recording and reporting of safety matters.

To create a new operating unit, click on the New icon against the relevant Location and Site:

In this example, we are creating an Operating Unit for Packaging within the Sydney Warehouse site.

Site Periodic Factors

This updateable report is used to define and manage information used for safety reporting by period, location, and site on a month and year basis. It includes some fields to enter values for dashboard items that are not otherwise captured within the module, such as notices issued/closed, prosecutions, fines, etc.
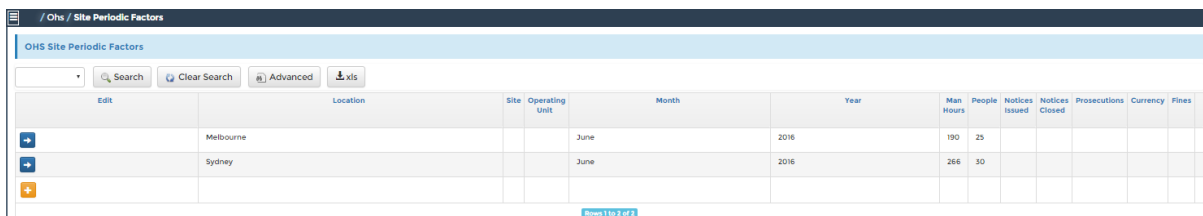
Site Safety Roles

Manage the positions for each safety-related role. These roles are used for incident and hazard notifications through workflow as noted previously.

This is an updateable report enabling you to assign the occupant of a defined position to the various roles used within the Safety module workflows and notifications. The roles are position-based so that you do not need to update them when people move within the business or depart.

There are currently 4 roles defined within the area. They are:

> Site OHS Officer
>
> Site Manager
>
> Site OHS Manager
>
> Regional OHS Manager

Be sure to assign positions to the external locations "In Transit" and "Client Location" if relevant for your business.

Scoreboard

When first accessing the Safety module through the HR menu, the page will display the dashboard with multiple statistics displayed to give you a comprehensive overview. Use the "View more" links that display (in many but not all cases) when a statistic is greater than zero to see graphical and source data that support the initial statistic.

View Exportable Report

▼ Filter

Period Type = Rolling 12 months
AND Period End = 2023-10-25

Health & Safety Incident Scoreboard

47	3	3
Days since last incident	Number of incidents – current	Number of incidents – previous
View more »	View more »	View more »

0	0	0
Total labour-hours – current	Number of people working – current	Incidents per 1,000,000 hours worked – current

0	0	0
Total labour-hours – previous	Number of people working – previous	Incidents per 1,000,000 hours worked – previous

Lost Time Results

0	0	0
Number of lost-time injury incidents – current	Days lost to injury/illness – current	Days restricted duties due to injury/illness – current

Number of lost-time injury incidents – previous	Days lost to injury/illness – previous	Days restricted duties due to injury/illness – previous

0	
Permanent transfers due to injury/illness – current	Permanent transfers due to injury/illness – previous

Hazard Identification and Clearance

0	0	
Number of hazards indentified – current	Average hazard clearance rate – current	Number of hazards outstanding

0	0
Number of hazards indentified – previous	Average hazard clearance rate – previous

Notices

0	0
Notices issued – current	Notices closed – current

0	0
Notices issued – previous	Notices closed – previous

Legal

0	0
Prosecutions – current	Fines – current

0	0
Prosecutions – previous	Fines – previous

To access the Safety module to configure and maintain the module, use the links on the left-hand menu.

The scoreboard gives all employees access to a summary of safety statistics for the selected location and period. To view the OH&S scoreboard, click on the *Safety Scoreboard* link on the Home menu or the *Incidents Tab* of the *Safety Module*. From the Home menu link, the dashboard is displayed, filtered by the login user's location in a rolling 12-month format. The notices and legal sections and the "View more" links are not visible via the home menu.

For safety administrators, there is a 2-part wizard which allows the user to set the required parameters for your report and then to view the results. Leaving the non-mandatory fields blank will provide the results unfiltered.

Click on the Next button to view the results:

Please note there is the ability to download the results to Excel for easy distribution or editing.

Clicking on the *Previous* button will return you to the parameters tab where you can make changes as needed. The user's parameters are stored for regular use but can be changed the next time a feature is accessed.

Clicking the *Next* button will lead you to the Scoreboard itself.

Clicking on the *Finish* button will exit you from the scoreboard area.
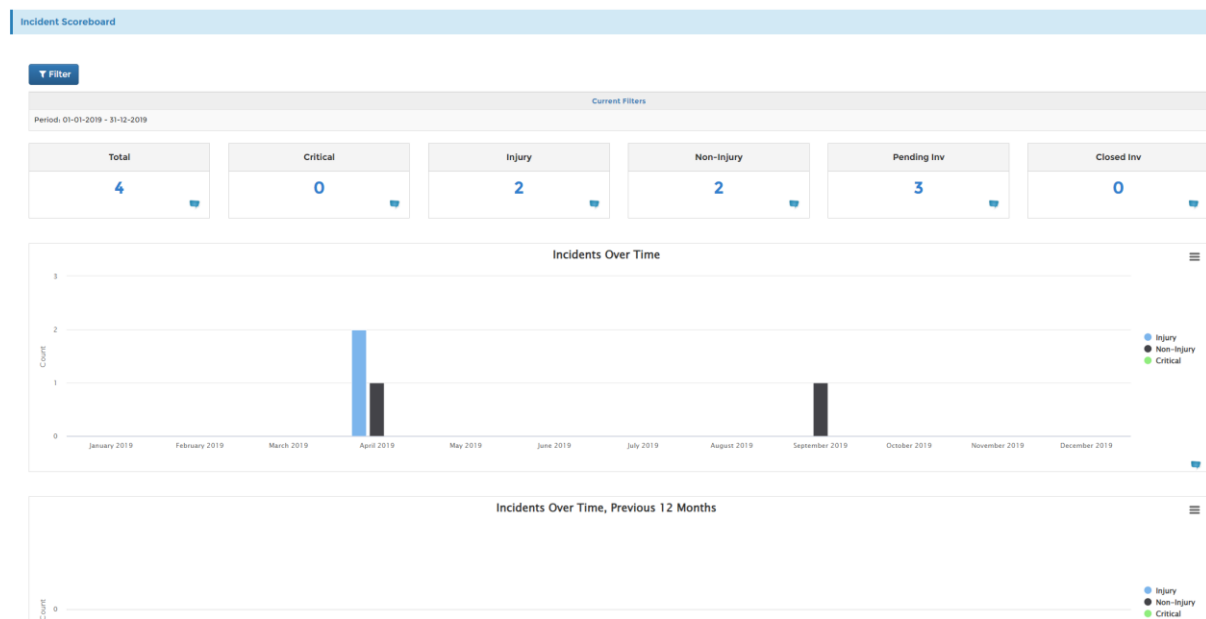
Incidents

Incident Scoreboard

This provides some quick data about the incidents within the system. The user can filter data by period (date), company, org unit, location, region, etc. If a user has assigned data filters, these will be applied and limit the filter options for the scoreboard.

Company is determined based on the company of the incident owner. Location is determined from the location selected on the incident. The region is based on the location. If an organization unit has been defined on the incident, this will be used; otherwise, the incident owner's organization unit is used.

Tabular values for incident counts are provided:

- Total, Critical, Injury, Non-Injury, Pending Investigation, Closed Investigation

Rolling 12-month charts of Critical, Injury, and Non-Injury incidents are provided for the period ending on the filter end date and one year previous for tracking trends.

Register an Incident

Incidents are registered by employees via:

> Home -> Safety -> Register Incident.

Users with Admin access can register incidents via either:

> HR -> Safety -> Incidents/Hazards -> Register Incident (Simple)

> HR -> Safety -> Incidents/Hazards -> Register Incident (Full)

In all cases, notifications are sent via workflow to advise the relevant parties of the incident. The difference between the simple and full versions is described later in this document.

Register a Non-Injury Incident

To report non-injury incidents, select any of the options in the Type field except Injury or Illness. You can include an attachment photo that relates to the incident. Notifications occur automatically to the login user's manager and site safety team.

Complete at least the mandatory fields; the other fields can be completed by the incident owner or investigator. Depending on the Reporting Person Type entered, the user is provided with either a pick-list field to select a colleague, or a text box to enter the name of contractor, third party, or member of the public that first reported the incident.

When complete, please click Save to submit the form to workflow which notifies the relevant staff for the location/site.

Register an Injury Incident

To report injury or illness incidents select either the Injury or Illness option in the Type field. Additional fields will appear related to Involved Person and Injury/Illness Detail.

At a minimum, users need to complete the mandatory fields as indicated by the red asterisks.

Additional people can be added once the incident has been registered via the incident management report. You can attach a photo that relates to the incident. Workflow notifications occur automatically to the selected Owner and site safety team.

Incident

✔ Save

Type	Injury ⌄ *
Category	◉ Minor ○ Critical
Title	Collision on way to client in Ashfield *
Description	Rear-ended while waiting for lights to change. Bruising from seat belt.
Attach Photo	Choose File	No file chosen

Incident Detail

Date Occurred	2024-01-25 * 📅
Time Occurred	10:15 ⌄
Location	In Transit ⌄ *
External Location	Intersection of Parramatta Road and Liverpool Road, Haberfield

Involved Person

Involved Person Type	Employee ⌄
Select Involved Person	☰ Meredith Grey

Injury/Illness Detail

Classification	First Aid ⌄

Reporting Person

Reporting Person Type	Employee ⌄
Select Reporting Person	☰ Barry Trotter
Owner	☰ Torres, Callie

Register Incident (Full)

The above images have shown the "simple" version of the incident registration form. The "full" version includes additional fields to capture more details from the beginning. Businesses with staff that are more experienced with safety reporting may opt for this version to be used by all users. It is a simple adjustment to put this in place.

Most of the additional fields are related to the involved person for injuries and illnesses.

Incident Management

Once incidents are reported, they will need to be managed by the incident owner and/or members of the safety team.

Investigations are generally conducted by a nominated investigation team where necessary.

Maintaining complete records will assist in your Legal Compliance regarding safety matters.

All reported incidents will appear in the Incident Management report.

Various filters can be used to narrow your search, such as specific types of incidents or locations or dates.

Edit

Click on the Edit icon to update the incident on an on-going basis.

There are 6 tabs which will be progressively completed as the investigation progresses. The tabs provide the ability to:

- edit the incident overview

- add involved people

- add attachments

- add investigation details

- add corrective actions

- add analysis

The basic details relating to the selected incident appear in the header of the wizard.

Incident Overview

✓ Save   ✗ Delete

Incident ID : **1042**
Location : **Sydney**
Date Occurred : **11-02-2023 00:30**
Shift :
Owner : **Torres, Callie**
Title : wrist

Type : **Injury**
Site : **SydWardA**
Date Reported : **11-02-2023**
Status : **Open**
Reported By : **TEST1, James**

Warning: deleting an incident also deletes the involved people, attachments, actions, investigation, and analyses displayed on the various tabs of this form. Any pending workflow instances for related actions are cancelled.

Incident Overview	Involved people	Attachments	Investigation	Corrective Actions	Analysis

➕ **Edit Overview**

Category   ⦿ Minor ⃝ Critical

Incident Outcomes

Immediate Action

Statutory Authorities Attending/Notified
Ambulance
EPA – NSW
EPA – NZ
EPA – Qld
EPA – SA

Other Details

Shift   ⃝ Afternoon ⃝ Day ⃝ Night

Period of Shift Worked   ⃝ 0-25% ⃝ 26-50% ⃝ 51-75% ⃝ 76-100% ⃝ Overtime

Responsible Organisation Unit   1029 example org unit

Risk Assessment

Risk Rating

Actions

The Actions icon at the right of the report provides direct access to the related actions for the incident selected. Additional actions can be added to open incidents.

Actions

➕ New Action

🔍 Search   🔄 Clear   📋 Advanced

Edit		Assigned Person	Action ID	Action To Be Taken	Topic	Due Date	Resolution Date	Status
📝		Brooke Freeman	1023	clean up mess		2021-09-10		Action submitted
📝		Brooke Freeman	1026	Arrange plumber to attend site and seal toilet	toilet needs to be sealed	2022-07-08		Action submitted
📝		Ramjet Roger	1027	test action		2023-05-17		Action submitted
				Rows 1 to 3 of 3				

This can also be viewed via the actions tab on the incident management form.

Analysis

Use the appropriate analysis icon(s) on the incident management form to enter any of the appropriate additional data relating to this incident. You can access this form directly from the incident management report's Analysis icon at the right.

Each of the icons leads to a form with various options available depending on the type of analysis selected. Once data is entered, it is displayed in the grid above the icons.

Update Status

The update status icon will allow you to update the status and to apply/remove classification locks on any associated injuries. Logic is included to record the status change date and who made the change.

Incident Bulk Maintenance

Update incident summary location/site, type, owner, and publishing for one or more incidents from one report. This is available to safety administrators only. If only editing one incident, search for the incident ID and update as needed. This provides better system performance.

Injury and Illness

This report lists only the two incident types noted, with details of the involved person included. The Edit icon leads to the incident management form.

Edit	Incident ID	Brief Summary	Status	Category	Location	Site	Area	Incident Owner	Ailing Person	Position	Age Range	Incident Date	Incident Time	Date Reported	Current Classification	Classification Date	Days Lost	Days On Restricted Duties	Primary Nature	Body Location
→	1042	wrist	Open	Minor	Sydney	SydWardA		Torres, Callie	伐季			2023-11-02	00:30	2023-11-02	Notifiable Incident	2023-11-02				
→	1041	Stressed from work overload after several redundancies			Sydney	Obstetrics	Obstetrics Ward A	Torres, Callie	Contractor, Joe		45 - 49	2023-09-08	10:45	2023-09-08	Lost-Time Injury	2023-09-08				

At the far right of the report, a link is provided to reclassify the incident since some injuries become more severe over time.

Hazards

If something in the workplace is considered a threat to an individual's health and safety, it can be identified as a hazard before an incident occurs. To identify a hazard in the workplace, click on the *Hazard Identification* link within the *Safety* section of the *Home Menu*

Hazard Scoreboard

This provides some quick data about the hazards within the system. The user can filter data by period (date), company, org unit, location, region, etc. If a user has assigned data filters, these will be applied and limit the filter options for the scoreboard.

Company and organization unit are determined based on the company of the person who raised the hazard. Location is determined from the location selected on the incident. The region is based on the location.

Tabular values for hazard counts are provided:

- Total, Open, Inspected, Reviewed, Closed, Clearance Rate

A rolling 12-month view of open and closed hazards is based on the period end date filter selected.

Pie charts of hazards by risk rating and by category are also included.
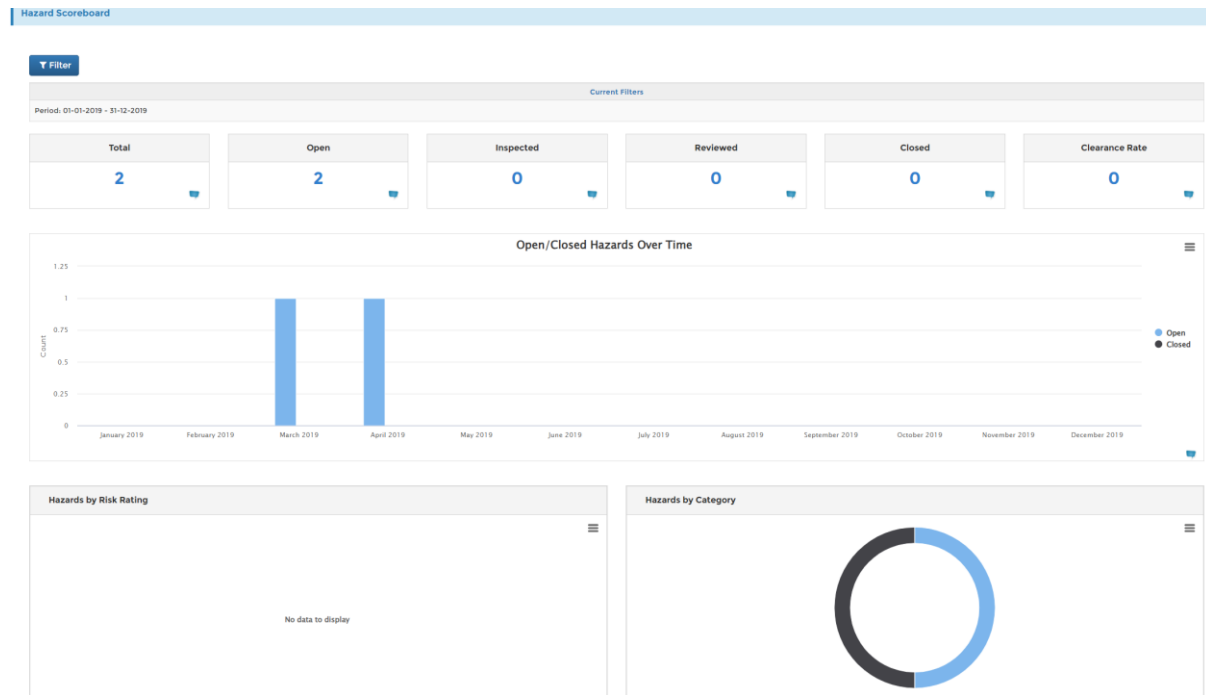
Hazard Identification

Hazard Identification

✔ Save

Hazard ID	
Title	loose tiles on main floor ✱
Description	many of the tiles on the main floor are loose and may flip up when stepping on a corner of a tile.
Attach Photo or Document	Choose File No file chosen
Category	Environmental ✱
Material	
Location	Sydney ✱
Site	Obstetrics
Area	Obstetrics Ward A
Comments	
Identified by	Michael Mosely
Date Identified	2024-01-25
Raised by	TEST1, James
Date Raised	2024-01-26
Status	Open

In this example loose floor tiles in Sydney Obstetrics Ward A have been identified by Michael Mosely.

Hazard Management

Once a hazard has been identified, notification alerts will be generated to advise the relevant parties that a hazard has been identified and generally it will then be the responsibility of the safety team to manage that hazard in the best way.

The Hazard Management link lists a report of all reported hazards.

Click on the Edit icon to manage the relevant data for this hazard on the 7 tabs as required.

Hazard Risk Controls

Using the Hazard Management report, click the icon in the Controls field (circled below) to view or edit the controls for a hazard.

The Hazard Risk Controls report opens, showing any records already recorded and providing a link (+) at the left to add new controls. Links at the right allow you to view/enter controls for the hazard and link the hazard to related incidents.

Edit	Title	Control Type	Description	Control Status	Estimated Completion Date	Actual Completion Date				Actions	Control Review
🖉	loose tiles on main floor	1 - Elimination	test	Corrective action complete	2020-11-30	2020-11-03					
+											

Rows 1 to 1 of 1

Hazard Risk Control Review

The Hazard Risk Control Review report opens with a link (+) at the left to add new records.

Edit		Hazard	Control Type	Control Description	Review Date	Review By	Action Required	Action Description	Attachment	Next Review Date
+										

Clicking the icon opens fields in the report for direct editing. The first few fields do not display data until you save the record by clicking the insert icon on the left. If the control is noted as complete, you cannot add new control reviews.

Edit	Hazard	Control Type	Control Description	Review Date	Review By	Action Required	Action Description	Attachment	Next Review Date
✓				*	*			Choose File No file chosen	

Rows 0 to 0 of 0

There are links available to Edit the hazard details, assign risk controls and to report any related incidents to this hazard.

SDS Register (Safety Data Sheet)

This link displays a listing of all materials that have potential risk. A + link to add new items to the list.

Safety Data Sheet Register

Edit	Material ID	Material	Manufacturer	Application	Issue Date	Expiry Date	Location	Site	Area	Cost Centre	Hazard	Risk Rating	Assessment Date	Assessor
➡	1001	Ammonia		disinfectant	2021-08-01	2026-07-31	Sydney							
➡	1002	Acetic acid		Cleaning solvent	2023-03-15	2028-03-14	Melbourne	Kitchen						
➕														

Rows 1 to 2 of 2

Click the blue arrow icon to view/edit the details of an existing item.

Safety Data Sheet

✔ Save   ✖ Delete

Material ID	1002
Material	Acetic acid
Manufacturer	
Application	Cleaning solvent
Description	Uses of Acetic Acid Ethanoic acid is used in the manufacturing of
Documentation	Choose File No file chosen
	⛔ ACETIC-ACID-90.jpg
Photo	Choose File No file chosen

Organisational Details   **Assessment**

Location	Melbourne
Site	
Area	
Cost Centre	

Comments	
SDS Issue Date	2023-03-15 📅
Expiry Date	📅

Hazard Risk Consequences

Consequence values used in the risk chart. Default values are provided.

Hazard Risk Consequences

	Edit	Priority	Name	Description	Status
➡		5	Extreme	5	Active
➡		4	High	4	Active
➡		2	Low	2	Active
➡		3	Medium	3	Active
➡		1	Very Low	1	Active
➕					

Hazard Risk Probability

Probability values used in the risk chart. Default values are provided.

Hazard Risk Probability

	Edit	Priority	Name	Description	Status
➡		5	Common	5	Active
➡		3	Possible	3	Active
➡		4	Probable	4	Active
➡		1	Rare	1	Active
➡		2	Unlikely	2	Active
➕					

Rows 1 to 5 of 5

Hazard Risk Matrix

Define the Risk Chart settings using a combination of Probabilities, Consequences, Priority and Rating. This can be up to a 5 x 5 matrix.

Hazard Risk Matrix

Consequence/ Probability	Very Low	Low	Medium	High	Extreme
Common	5 : Moderate	10 : Major	15 : Major	20 : Severe	25 : Severe
Probable	4 : Moderate	8 : Moderate	12 : Major	16 : Major	20 : Severe
Possible	3 : Minor	6 : Moderate	9 : Moderate	12 : Major	15 : Major
Unlikely	2 : Minor	4 : Moderate	6 : Moderate	8 : Moderate	10 : Major
Rare	1 : Minor	2 : Minor	3 : Moderate	4 : Moderate	5 : Moderate

	Edit	Probability	Consequence	Priority	Rating
➡		1 - Rare	1 - Very Low	1	Minor
➡		1 - Rare	2 - Low	2	Minor
➡		1 - Rare	3 - Medium	3	Moderate
➡		1 - Rare	4 - High	4	Moderate
➡		1 - Rare	5 - Extreme	5	Moderate
➡		2 - Unlikely	1 - Very Low	2	Minor
➡		2 - Unlikely	2 - Low	4	Moderate
➡		2 - Unlikely	3 - Medium	6	Moderate
➡		2 - Unlikely	4 - High	8	Moderate
➡		2 - Unlikely	5 - Extreme	10	Major
➡		3 - Possible	1 - Very Low	3	Minor
➡		3 - Possible	2 - Low	6	Moderate

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Job Safety Analysis

Tasks that present a risk to the staff performing them can be described and the PPE, training, and sub-tasks can be defined as a reference to best practice.

The form allows for multiple entries for PPE, training, and the worksheet.

Protective Equipment

A report and form are available to enter details about various personal protective equipment that is used within your organisation. The items included here are available for use with job safety analyses.

Alert Configuration

Some communications within the Safety module are handled using alerts. These are notifications for time-based actions, such as upcoming equipment tests, action past due dates, and hazard control target dates.

The following displays a list of the standard alerts used in the Safety module.

Safety Alert Configuration

	Alert ID	Alert Name	Status	Last Updated	Record
→	OHSHazardControlTargetReminder	Hazard Control Approaching Target Date	False		●
→	OHSHazardControlPastDueReminder	Hazard Control Past Due	False		●
→	OHSActionDueReminder	Health and Safety Action Approaching Target Date	False		●
→	OHSActionPastDueReminder	Health and Safety Action Past Due	False		●
→	OHSAuditPlanReminder	OHS Audit Reminder	False		●
→	OHSEquipmentOwnerReminder1	OHS Equipment Owner Test Reminder - 1 day	False		●
→	OHSEquipmentOwnerReminder28	OHS Equipment Owner Test Reminder - 28 days	False		●
→	OHSEquipmentServiceReminder	OHS Equipment Service Reminder	False		●
→	OHSEquipmentTestReminder	OHS Equipment Test Reminder	False		●
→	OHSIncidentOwnerNotClosed20	OHS Owner - IncidentNot Closed 20 Days	False		●
→	OHSncidentClosureSubmitter	Safety Incident Closure - Submitter	False		●

Rows 1 to 11 of 11

Alerts are run on a nightly schedule. By default, the alerts are disabled (status = false). When an alert is in test status, you can verify the content without accidentally sending it out. Once you are happy with the test results, set the status to true for regular processing. Only set the status to True for the alerts to notify the roles you intend to use.

Alerts can be modified if required.

OHS Alert Configuration

Alert ID	OHSHazardControlTargetReminder
Alert Name	Hazard Control Approaching Target Date
Status	○ True ○ False ◉ Test
Category	OHS
Recipient	Email address of additional person not on the recordse
Subject	Hazard Control Target Completion Date is [TargetDate]

Body:

Hi [Profile_First_Name].

This is a reminder that an Hazard Control assigned to you is targeted for completion on [TargetDate]. Details are:

Assigned by: [OwnerName]

Date Assigned: [AssignmentDate]

Hazard: [Hazard]

Detail: [HazardDetail]

The message subject and body can be edited, so you can add or remove any data as required. The square brackets [] are used to substitute the data held in the data column named, so be careful with editing this. If you require additional information from the system to be included in the messages, please contact EmployeeConnect since, due to security and technical reasons, the queries used to compile the alert data cannot be altered via the system directly.

There are alerts that are used as reminders for Actions and Hazard Controls, relating to target/due dates. The action forms include fields to define the due date, reminder days and past due days. These values are used to generate reminder messages to the assigned person.

Assignment Date	2016-06-10
Due Date	2016-06-17
Days Until Reminder	4
Overdue Notification Days	1

Pending and accepted actions are checked for due date approaching and past due.

Similar reminders are sent based on hazard control estimated completion dates and equipment test and service dates.

Alert Log

The safety alert log displays the safety alerts that have been generated in the system with a time & date and other relevant information for auditing purposes. Failed items will show a status of "error" and can be edited by safety administrators to correct the data problems.

Actions

Actions can be created from most areas of the module, including incidents, hazard controls, exposure, compensation claims, rehabilitation plans, committees, audit results, and emergency roles. Creating an action will generate a workflow as follows:
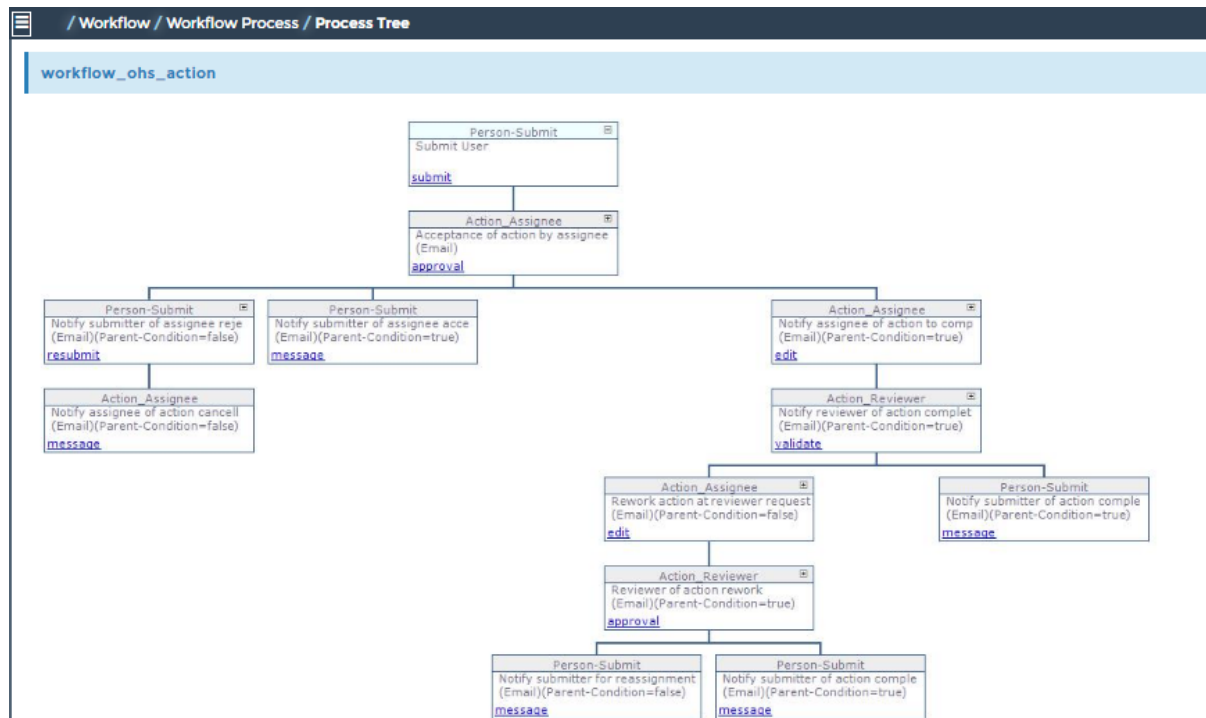
The first step in the Safety Action workflow process is the acceptance of the assignment of the action. Once the assignee has accepted the assignment, the next step is to notify the assignee of the actions to be completed. There is an action reviewer step to confirm the completion of the action(s) and ultimately the original submitter will be notified of the results. The system manages the status of each action based on the completion of the various steps in the workflow process.

Action Scoreboard

A filterable scoreboard provides details about the actions, their statuses, and other aspects, such as pending/completed actions by source, average closure rates, and past due actions. Below is a partial example. If the login user has general data filters applied, these will also take effect on the filter form for this scoreboard.

Action Scoreboard

Action Management dashboard with filters and pie charts

Total Actions	Pending Acceptance	Not Accepted	Pending	Completed	Unresolved
10	6	0	1	1	0
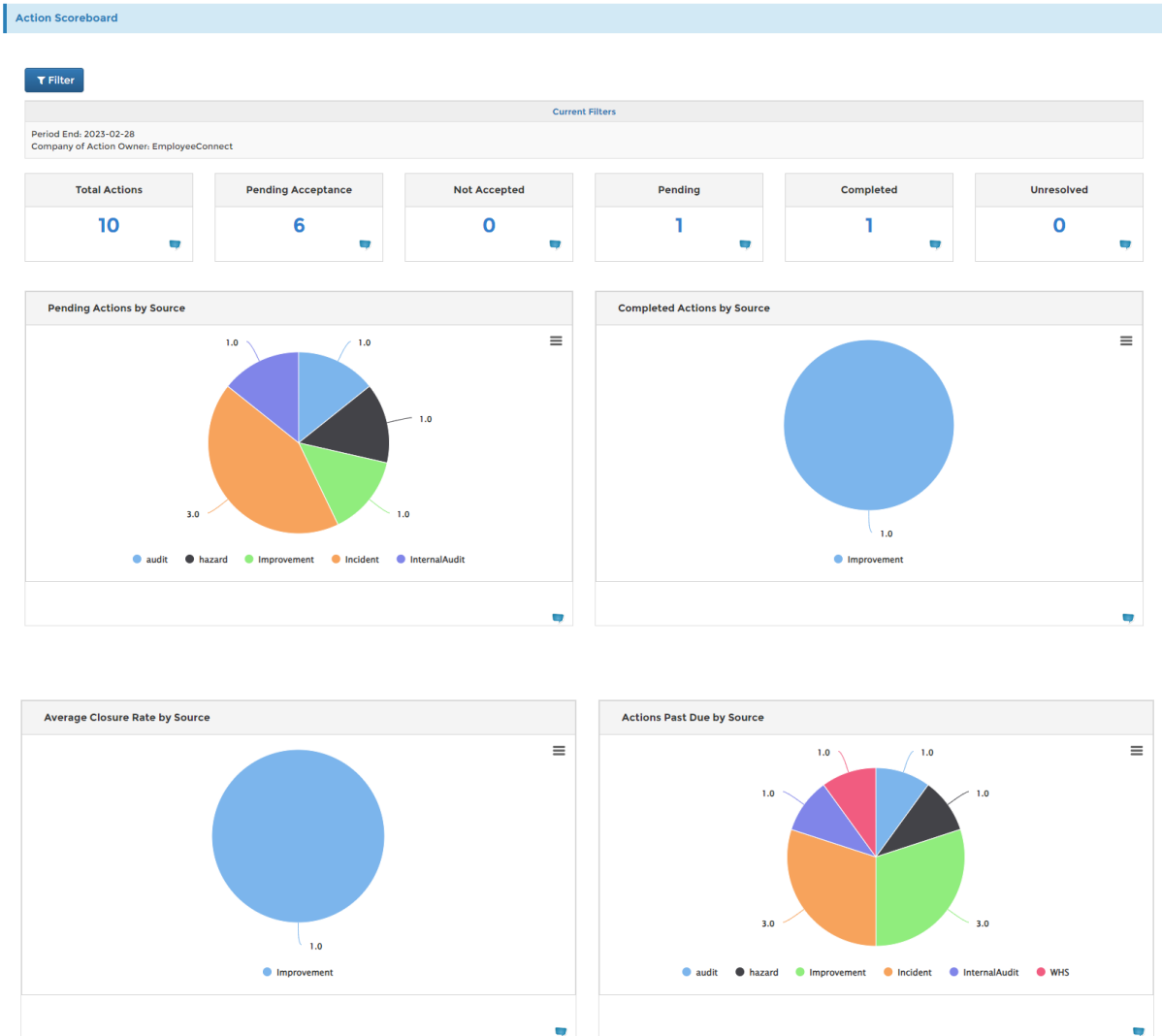
Action Management

The Action Management report displays all the assigned actions with the ability to edit.

Edit	Source	Source ID	Location	Site	Operating Unit	Priority	Raised By	Assigned Date	Assigned Person	Action To Be Taken	Due Date	Status
→	Hazard	Loose hand rail	Sydney			2.Medium	Shepherd, Derek	2016-06-23	Pending Acceptance by Karev, Alex	Call a a handyman to fix the loose hand rail	2016-06-08	Action submitted
→	Hazard	Loosehandrail	Sydney			2.Medium	Shepherd, Derek	2016-06-21	Karev, Alex	Organise carpenter to fix the handrail		Action accepted
→	Hazard	Broken Door	Melbourne			2.Medium	Shepherd, Derek	2016-06-21	Karev, Alex	Call handyman to fix door	2016-06-24	Action accepted
→	Hazard	broken door	Melbourne			2.Medium	Shepherd, Derek	2016-06-21	Karev, Alex	Call carpenter to fix door	2016-07-06	Action completed
→	Hazard	Loose railing on stairs	Sydney			2.Medium	Shepherd, Derek	2016-06-14	Karev, Alex	Repair handrail on warehouse stairs	2016-06-28	Action accepted
→	Hazard	Broken Fridge	Sydney			2.Medium	Shepherd, Derek	2016-06-14	cirrus, demo			Action accepted

A 5-tab form enables the updating and tracking of the progress of any assigned actions.

Bulk Maintenance

The Action Bulk Update report displays all assigned actions and can be used to update any number of actions easily and efficiently.

Raise an Action

This link provides the ability for people to raise a new safety action and assign it through the standard workflow while not directly related to hazards, incidents, committees, etc., as a generic action. safety Administrators can manage the list values for "ActionSource" that appear on the form. Actions related to specific areas of the safety module are excluded from the selection list.

Committees

Depending on the size of the company there might only be one Safety Committee or many Committees.

Safety Committees

This is an editable report enabling the definition of as many committees as required.

There are also links to Members and Actions associated with each committee.

Committee Members

Once you have defined the committee, you can then assign the people that comprise each committee.

The start and end dates for committee members can also be recorded, enabling historical records to be maintained.

Safety Meeting Minutes

View the meeting minutes of the safety committees in the organisation.

This is an updateable report to enable the attachment of the minutes for each committee meeting per committee.

When viewed from Home -> Safety -> Meeting Minutes, the report is read-only.

Committee Actions

This is a report of any Actions that were created through the Actions link on the Safety Committees report.

You can update existing actions as well as add new actions.

Audits

Audit Plans

Configure regular audits, set audit category areas, and include audit instructions.

Define an unlimited number of items per audit plan, include instructions, and set the frequency of this audit plan.

Audit Results

Once an audit has occurred, the results need to be recorded for reporting back to the committee. This report provides access to view existing results and to enter new results. The "Next Date" is determined from the frequency of the plan and the most recent result for the plan and location.

Use the Edit link to insert the results and the Actions link to assign any actions that were determined by the audit.

Audit Action

If actions have been assigned through the Audit Results, they will appear in the Audit Action report via the Actions link and can be updated through this link as needed.

Audit Result History

This report lists results from each audit plan by location with the item detail. The fields that are from the plans only display once for each result to provide a clear view of the data. The report data can be exported to Excel for easy distribution and review.

Audit Team Admin

Safety audit teams can be created with a team leader and additional members. Audit team leaders can initiate the results of safety audits and initiate audit-related actions to members of the audit teams they lead.

Once an audit team has been created, additional members can be added, and audit plans can be assigned.

Audit Team Member Assignment

To add team members, click the Members icon in the Audit Team Admin report for the appropriate team. This leads you to the Team Members assignment page for the selected team.

You can add and remove members one at a time using the Member (click) icon. Alternatively, you can tick multiple people at one time, then click the green check icon at the bottom left to assign all selected. There are filter buttons at the right of the report to simplify the view.

People assigned to at least one audit team and plan as either team leader or team member can enter and view audit results via *Home -> Safety -> Audit Results – Team* and *Audit Results – Team Leader* links. People not assigned to audit teams will not see the links.
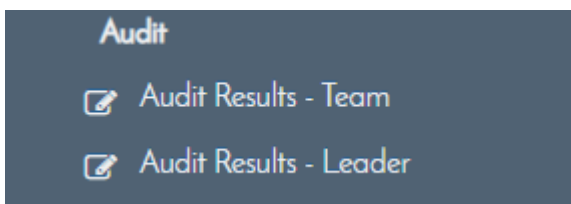
Audit Plan Assignment

To assign audit plans to an audit team, click the Assign Audit Plan icon in the Audit Team Admin report. This displays the assignment report with the audit team name in the report title and listing the assigned plans. Click the + icon to add a new assignment.

Audit Plan Assignment: melbourne safety audit					
	Audit Plan			**Comments**	**Record**
➡	Site Safety Tour	02-01-2024			🟢
✔	*▤	07-02-2024 📅	📅		
				Rows 1 to 1 of 1	

Use the picklist to choose the audit plan and provide comments as needed. When editing plan assignments, set the end dates where the plan assignment is no longer needed.

Home -> Safety Features

General users access the safety module via the home menu. Initially, most of the links are not visible to the user. As safety data that is associated with the user is added to the system, other links become visible to the user. This keeps the menu uncluttered for most users.

In the image below, the left portion shows the links that are always available, while the right portion shows the links that are visible when there is relevant data for the user.

Safety

- Scoreboard

Incident

- Register Incident

Hazard / Action

- Hazard Identification
- View Hazards
- SDS Register
- Raise an Action

Safety

- Scoreboard
- Meeting Minutes
- Safety Licences

Incident

- Register Incident
- Submitted Incidents
- Owned Incidents
- Owned Investigations
- Assigned Investigations

Hazard / Action

- Hazard Identification
- Exposure
- Hazard Management
- View Hazards
- SDS Register
- Raise an Action
- Owned Actions

Audit

- Audit Results - Team
- Audit Results - Leader