



Health & Safety Admin Guide



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Guide Information

This guide is designed based on the Oracle Cloud HCM delivered setups; some fields may differ from your instance configurations. For example, some fields may be required in this guide that are not required in your instance. Additionally, some of the training topics discussed in this guide may not apply to your organization, but we know you'll find it helpful. If you would like a custom guide for your organization, please contact Megan Ketter at mketter@camptratech.com.

How To Use This Guide

This guide is intended to assist Admin users with their day-to-day tasks in Oracle Cloud. A few notes before you begin:

- 1. Any fields with an asterisk are required fields.
- 2. Based on your configurations, approval workflows may in place for the training topics below; those tasks would need to be approved before the additions or updates are visible in your instance.
- 3. You may have specific flexfields in your instance that require inputs; this guide is a generic tool and will not include those specific flexfields. You will see those fields as a context segment or not visible at all in our Oracle instance.

Overall Process Flow

Before we begin with the training content, it's important to understand the overall process flow of information in Oracle Cloud for the Health & Safety module.



Glossary of Terms

Here we've included common terms associated to the Health & Safety module. Please review the terms below to familiarize yourself with the Oracle Cloud terms used throughout this guide.

Actions

Task assigned within an Incident.

Actions Approvers

Approvers of the actions within an Incident.

Action Details

Contains details of the action and includes Action Type, Priority, Resources Required, etc.

Action Owners

This group of users are responsible for completing the specific action assigned to them by Incident Owners.

Actions Page

Page includes the action details and includes notes, Stakeholder, Action preapprovers, Action Reviewers, Action Approvers, and Action Owners.

Action Preapprovers

First line approver of an action.

Action Reviewers

Once the action is approved by the Action Preapprovers, the action will move via workflow to the Action Review to review the Action Details.

Agencies Notified

The organization(s) contacted to assist with providing aid for the incident. For Example, Police, Fire, OSHA, etc.

Details Page

The incident page with the Incident Number and includes the Incident Details, Location, Risk Assessment, Agencies notified, Related Incidents, Stakeholders, Incident Reviewers, Incident Approvers. And Incident Owners.

EHS Manager

Acronym for Environmental Health & Safety Manager. By Default, this role is available with Workforce Health & Safety Incidents.

Events Page

Page includes opened and closed incidents that have been reported with the applicable incident details.

Event Type

Describes the type of Incident. For example, Fire or Explosion, Virus, illness, or Injury, Unsafe Act, etc.

Findings

The results of an investigation.

Incident Approvers

Approvers of the Incident details.

Incident Details

Contains date and time of incident, location details of the incident, a summary and description of the incident, severity

Incident Owner

This group of users is accountable for responding to specific incidents assigned to them by the team.

Incident Report

Contains the incident details

Incident Reporters

This can be a large group of users (typically all employees) that are encouraged to report Health & Safety concerns quickly.

Incident Reviewers

Reviewers of the Incident details.

Incident Event Type

Categories of incidents containing reporting information specific to the type of incident being reported. For example, Fire or Explosion, Health Survey, Unsafe Act, etc.

Investigations Page

Page includes opened and closed investigations with the applicable investigation details.

Investigation Approvers

Approvers of the Investigation details.

Investigation Details

Contains date and time of the investigation, investigation type, a summary and description of the investigation, and lessons learned.

Investigation Owners

Person responsible for initiating, managing, and completing an investigation ensuring all details are documented within a target completion date.

Investigation Preapprovers

First line approver of an investigation.

Investigation Questionnaire

A questionnaire used to perform systematic investigations.

Investigation Reviewers

Reviewers of the Investigation details.

Notes

Details attached to the safety incident by the Incident Reporter and reviewed by the Health & Safety Team.

Overall Findings

Here you can specify the final findings of an investigation including Casual Factors, Immediate Case, Underlying Factors, Root Cause, Contributing Factors, Comments and Final responses.

Related Incidents

Two or more incidents related based on incident details.

Risk Assessment

A risk assessment for an incident and select what's the consequence of the incident and what's the likelihood of the incident happening. The consequence indicates what impact the incident has on the organization, for example, insignificant, moderate, or catastrophic.

Stakeholders

A person with an interest or concern in relation to a incident.

Day to Day Operations Guide

Report An Incident (Employee)

Navigation: Home>Me>Safety Incidents>Select Incident Type>Submit

From the home screen, click Me



Click Safety Incidents

Me	My Team	My Client Groups	Benefits Admi	nistration Work	space Risk Man	agement Sales	Service	He >
QUICK	ACTIONS	APPS						
>	Medical Plan Compari	son	Q		G	ሰጽ	0	
Ê	My Public Info		Directory	Journeys	Time and Absences	Career and Performance	Personal Information	
ŵ	Change Photo							
6 ^ 6	Share Data Access		\triangleright		i	\mathcal{K}		
6 6	Share Personal Info		Learning	Benefits	My Benefits Summary	Company Benefits Portal	Opportunity Marketplace	
	Document Delivery Pr	eferences						
æ1	Eligible Jobs		þ	S S			+	
81	Resignation		Current Jobs	Safety Incidents	Performance	Camptra Support Portal		
Show 1	More				Click Sa	afety Incidents		
								12400

From the **Safety Incidents** screen, select one or more **Incident Type(s)** and click **Continue**

ntinue.	Select the Incid	ent Type(s) below	Simbination of other options
	Virus, Illn 19)	ess, or Injury (COVID-	
Fire or Explosion	Health Survey	Near Miss	Property Damage
Spill or Release	Suggestion for Improvement	Unsafe Act	Unsafe Condition

Report an Incident by entering the Incident Details. Click Continue

Incident Details Enter	the Incident Details Below							
*What's the incident?								
Tables Stacked Against The Walls								
Provide more details								
In the 3rd floor conference room, there are multiple tables unsafel someone from facilities please remove these tables? The conference of the conference of the source o	n the 3rd floor conference room, there are multiple tables unsafely stacked against the wall. The table stacked in the front has fallen and dented the wall. Can omeone from facilities please remove these tables? The conference room isn't usable due to this safety issue.							
Actions already taken								
I placed a "Do Not Enter Until Further Notice" sign on the door.	I placed a "Do Not Enter Until Further Notice" sign on the door.							
Major ~								
- Was it on-site or off-site?								
On-site ~								
*Where did the incident happen?	Address							
Corporate HQ v	123 Main St Yorba Linda, CA 92887 Orange United States							
*Where exactly?								
3rd Floor Conference Room	Click Continue							
	Continue							

Enter the Who's Reporting This Incident information. Click Continue

1 Incident Details			
2 Who's Reporting This Incide	ent? Enter	information below	
Incident Reporter		*Name	
Employee	~	Patrick Jones	~
*When did it happen?		Who was notified?	
8/2/22 4:00 PM	Ċ		~
Incident Owner		Notification Time	
Patrick Jones	~	8/3/22 3:55 PM	i o
		Castinua	
		Contin <u>u</u> e	

Add an **Attachment** related to the incident. This can be a picture of the unsafe act. Click **Submit** to submit the Incident Report to the EHS Manager. Employee will receive an email with the Incident Details.

Report an Incident	Click Submit	S	ub <u>m</u> it
1	Incident Details	🖍 Edit	
2	Who's Reporting This Incident?	🖋 Edit	
0	Attachments		
	Drag files here or click to add attachment		

Report An Incident (On Behalf of Employee)

Navigation: Home>My Client Groups>Safety Incidents>Add>Select Incident Type>Submit

From the home screen, click My Client Groups

Good afternoon, PROD IMPLADMIN!								
Me	My Team My Client Groups	Benefits Adm	inistration Work	space Risk Man	agement Sales	Service He	¢ >	
QUICK ACTI	IONS A	Click My C	Click My Client Groups					
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伦 [*] Hir	e an Employee	Hiring		Journeys	New Person	Person Management		
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Per Per				A A Tologt Review		Talant Pools		
Per Per	rsonal Details	Profiles	Career Development	laient Keview	Succession Plans	Tatent Pools		

Click Safety Incidents

HCM Experience Design Studio [®] [#] Hire an Employee [®] [#] Add a Contingent Worker	සිත් Hiring	Agency Hiring	Dourneys	New Person	Person Management
은 * Add a Pending Worker 안 * Add a Nonworker	Absences	Time Management	Compensation	රිම _{Goals}	Performance
안ź Pending Workers 안 Person 안 Personal Details	Profiles	Career Development	Talent Review	Succession Plans	Talent Pools
Additional Person Info Additional Person Info Employment Contracts	Learning	Workforce Structures	Mass Updates	Payroll	品》 Workforce Modeling
Contact Info	Workforce Predictions	Click Safety	Incidents	Safety Incidents	+

Click Add

Workforce Health and	l Safety Incidents		
Incide	nts		+ Add
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Default	Criteria V Save	Positive Covid Test Employee John Smith INC-5003	X -
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Expand A	All Collapse All	No Owner Open	
∧ Targe	t Completion Date	fire INC-10001	×
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Due in 48	8 Hours	No Effect on Safety 4/23/2022 Overdue	0 Investigations
Due in 7	Days	No Owner	U ACIONS
Overdue	by 24 Hours	Open	
Overdue	by 48 Hours		
Overdue	by 7 Days	asgan INC-10009	×
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^ Level	of Severity	No Effect on Safety 4/24/2022 Overdue No Owner Open	0 Investigations 0 Actions
No Et	ffect on Safety	open	
Mino	or	Employee 23 has tested covid positive	×

Create Incident by entering the Incident Details

Create Incident				Saur
	Incident Details	Enter the Inc	cident Details	
	*Summary			
	Liquid Spill on Stairwell			
	[*] Date and Time		Level of Severity	
	8/3/2022 4:19 PM	Μ	No Effect on Safety	~
	Description			
	On the landing area of the 2nd floor stairw	ell, there is a large wet spot on the	floor. It could be a leak from the ceiling.	
				<i>h</i>
	Immediate Actions			
	I placed a "Wet Floor" sign on top of the ar	Pa.		
	· · · · · · · · · · · · · · · · · · ·			
				A
	Lessons Learned			
	Incident Reporter		Who was notified?	
	Employee	~	Patrick Jones	~
	*Reporter Name		Notification Time	
	Rakesh Jhindal	~	8/3/2022 4:19 PM	0 ¹

Scroll down to enter the Incident Location details

Incident Location	ter the Incident I ocation details
Location	Address 133 Main St
On-site	Yorba Linda, CA 92887
*Location Name	Orange United States
Corporate HQ	Specific Location
	2nd Floor Stairwell Landing
Conditions	
Facility Closed or Operations Ceased	
Emergency Action Plan Activated	
Execution	
Evacuation	
Business Continuity Plan Activated	
Risk Assessment	
Thisk / bacastheric	
Agencies Notified	
3	
Related Incidents	

Scroll down to enter the additional Incident details. You can enter information in these areas by expanding each section. The information required in these sections will depend on your configurations.

Create Incident			Save
	Risk Assessment		
	Agencies Notified		
	Related Incidents	Expand Each Section Here	
	Attachments		
	Notes		
	Incident Reviewers		
	Incident Approvers		
	Incident Owner		
	*Incident Owner	Completed	
	Patrick Jones	Date Completed	
	10/2/2022	m/d/yyyy	
		Action Required	

Lastly, enter the Incident Owner details. Click Save and Close

			Sa	ve Save and Close
Agencies Notimed			Click Save and Close	- 6 to - 0
Related Incidents			~	
Attachments			~	
Notes			~	
Incident Reviewers			~	
Incident Approvers			~	
Incident Owner	Enter the Incident Ow	ner Details		
*Incident Owner		Completed		
Patrick Jones	~			
*Target Completion Date		Date Completed		
10/2/2022	â	m/d/yyyy	te.	
		Action Required		

Complete A Health Survey

Navigation: Home>My Client Groups>Safety Incidents>Health Survey>Submit

From the home screen, click Me

Me My Team My Client Gro	oups Benefits Adm	iinistration Work:	space Risk Ma	nagement Sales	Service H
	APPS				
Medical Plan Comparison	<u> </u>	(D)		<u>î</u> r	^S
My Public Info	Directory	Journeys	Time and Absences	Career and Performance	Personal Information
က် Change Photo					
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ය යුරුයු Share Personal Info	Learning	Benefits	My Benefits Summary	Company Benefits Portal	Opportunity Marketplace
Document Delivery Preferences					
Ref Eligible Jobs	Ő	Sh _		<u>C</u>	

Click Safety Incidents

Me	My Team	My Client Groups	Benefits Admi	nistration Works	pace Risk Mar	nagement Sales	Service	⊣∈ > —
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6 ^ 6	Share Data Access		\bigcirc	Ĩ	Õ	$\overrightarrow{\Sigma}$		
6°6	Share Personal Info		Learning	Benefits	My Benefits Summary	Company Benefits Portal	Opportunity Marketplace	
	Document Delivery Pr	references						
æ/	Eligible Jobs		þ	e la			+	
2∕∕	Resignation		Current Jobs	Safety Incidents	Performance	Camptra Support Portal		
Show M	lore				Click S	afety Incidents		

Click Health Survey. Click Continue

Create Report			Click Continue	Continue
To complete a health survey, select He continue.	alth Survey and continue. To create a	a safety incident, select any co	ombination of other options or just click	
Click Health Survey				
Fire or Explosion	Health Survey	Near Miss	Property Damage	
Spill or Release	Suggestion for Improvement	Unsafe Act	Unsafe Condition	

Complete the Health Survey Details and click Submit

Complete the Health Survey				Cancel
		6 20 20	Click Submit	
	Health Survey Details			-
	Complete the Health Survey Details			
	What type of survey responder are you?			
	Employee	•		
	Survey Responder Name			
	Patrick Jones	•		
	Survey Date and Time			
	8/3/22 4:49 PM	Ē		
	Survey Location			
	COVID-19 Survey	-		
	Have you tested positive for COVID-19?			
		-		
		Required		
	Are you displaying symptoms related to COVID-19?			
		-		
		Required		
	3. Date of test:			

Managing Safety Incidents

Navigation: Home>My Client Groups>Safety Incidents>Health Survey>Submit

Good afternoon, PR	OD IMPI	ADMIN!				
Me My Team My Client Group:	s Benefits Adr	ninistration Work	space Risk Mar	nagement Sales	Service H	le >
QUICK ACTIONS	APPS Click My	Client Groups				
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Hire an Employee	Hiring		Journeys	New Person	Person Management	
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Person	Profiles	Career	Talent Review	Succession Plans	Talent Pools	
Personal Details		Development				

From the home screen, click My Client Groups

Click Safety Incidents

HCM Experience Design Studio	විතු Hiring	Agency Hiring	Journeys	New Person	Person Management
은 Add a Pending Worker 안 Add a Pending Worker 안 Add a Nonworker	Absences	Time Management	Compensation	දිල _{Coals}	Performance
알카 Pending Workers 안 Person 안 Personal Details	Profiles	Career Development	Talent Review	Succession Plans	iiiiii Talent Pools
Additional Person Info Additional Person Info Employment Contracts Identification Info	(D) Learning	Workforce Structures	Mass Updates	Payroll	H کی Workforce Modeling
Contact Info	Workforce Predictions	Click Safety	Incidents Wolunteering	Safety Incidents	+

From the **Workforce Health and Safety Incidents** screen, EHS Managers can Add, Investigate, Manage, Edit, Delete, and View Incident Actions. Using the filters, Incidents can be sorted by:

- Incident Name or Number (Enter the Name or Incident Number in the search bar)
- Target Completion Date
- Level of Severity
- Event Type
- Location
- Status
- When Incident Was Reported?
- Saved Searches

Incidents Incidents Incid			6 6 10 1 1 1 X	
Sevench Hide Filters Saved Saved Search Soved Search Sort By Default Criteria Save Positive Covid Test Employee John Smith 11/2/0/2021 9:43 PM I Event Overdue 0 Investigations Filters Reset Positive Covid Test Employee John Smith 11/2/0/2021 9:43 PM I Event Overdue 0 Investigations Filters Reset Positive Covid Test Employee John Smith 11/2/0/2021 9:43 PM I Event Overdue 0 Investigations Date in 24 Hours Positive Covid Test Employee John Smith 11/2/0/2021 9:43 PM I Event Overdue 0 Investigations Due in 24 Hours I Collapse All O Woref 0 Overdue Dy 24 Hours 0 Investigations 0 Investigations Overdue by 24 Hours Open O Investigations 0 Overdue by 24 Hours Open Overdue by 24 Hours Open Open O Investigations 0 Investigations Overdue by 24 Hours Open Open O Investigations 0 Actions O Investigations 0 Actions Overdue by 24 Hours Open Open O Investigations 0 Actions O Investigations 0 Actions Overdue by 7 Days Hours Explored Doverdue 0 Portole Portole Open Overdue by 7 Days No Effect on Safety 0 Portore Open Onves	Incidents			+ Ad
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INC-11008	Minor	Employee 23 has tested covid positive		
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View And Edit Incident Reports

Navigation: Home>My Client Groups>Safety Incidents>Select Incident>Update>Submit

From the home screen, click My Client Groups



Click Safety Incidents

HCM Experience Design Studio	පීතී Hiring	Agency Hiring	Ø Journeys	New Person	Person Management
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알카 Pending Workers 안 Person 안 Personal Details	Profiles	Career Development	Talent Review	Succession Plans	Talent Pools
Additional Person Info Additional Person Info Employment Contracts Ela, Identification Info	Learning	Workforce Structures	Mass Updates	Payroll	品》 Workforce Modeling
Contact Info	Workforce Predictions	Click Safety	Incidents Volunteering	Safety Incidents	+

To view and edit an Incident, from the **Workforce Health and Safety Incidents** screen, select the **Incident**

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Event Type	Air Quality	Multiple Tables Stacked Against The Wall	

Scroll down to view the Incident Details. To edit the Incident Details, click Edit

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< INC-5003		
lé	Incident Details	Edit
Details	Summary	Click Edit
Events	Positive Covid Test Employee John Smith Date and Time 12/30/2021 9-43 PM	Level of Severity Hazardous
े Investigations	Description	
Actions	Lessons Learned	Who use notified?
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	Agencies Notified	~
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Update the applicable information. Click Save

INC-5003				
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Details				Save Cance
	*Summary			
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Attachments				
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	Lessons Learned			
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	Employee	\checkmark		~
	*Reporter Name		Notification Time	

Follow this same process for each section requiring an update.

Investigate Incidents

Navigation: Home>My Client Groups>Safety Incidents>Select Incident>Investigations>Add>Submit

From the home screen, click My Client Groups

Good afternoon, PROD IMPLADMIN!							
Me	My Team My Client Groups	Benefits Admi	nistration Works	space Risk Man	agement Sales	Service He	>
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Click Safety Incidents

HCM Experience Design Studio	ළුත් Hiring		Dourneys	New Person	Person Management
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Additional Person Info Employment Contracts Identification Info	Learning	Workforce Structures	Mass Updates	Payroll	品》 Workforce Modeling
Contact Info	Workforce Predictions	Click Safety	Incidents	Safety Incidents	+

To **Create Investigation**, from the **Workforce Health and Safety Incidents** screen, select the **Incident**

Search	Sort By
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Hazardous Major 1 Ibyestication Ov	ardue
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Click Investigations

< INC-5003	137-111-12		
	Incident Details		✓ Edit ∧
Events Click Investigations Actions Click Investigations	Summary Positive Covid Test Employee John Smith Date and Time Description Immediate Actions Lesons Learned Incident Reporter Employee	Level of Severity Hazardous Who was notified?	
# Attachments	Reporter Name Sarah Chapman	Notification Time 12/30/2021 9:43 PM	
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	Agencies Notified		~

Click Add

< INC-5003	
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Enter the Investigation Details

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Create Investigation		Save
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	Investigation Details Enter the Investigation Details	
	*Summary	
	*Date and Time	
	8/3/2022 6-07 PM	
	Description	
	Investigation Type Incident Event	
	Lessons Learned	
	Investigation Questionnaire	~
	*summary *Summary *Description Investigation Type Incident Event Lessons Learned Investigation Questionnaire	~

Scroll down to enter the additional Investigation details. You can enter information in these areas by expanding each section. The information required in these sections will depend on your configurations.

Create Investigation	Lessons Learned		Save	Save and Close
	Investigation Questionnaire			
	Findings			
	Overall Findings	Expand Each Section Here		
	Notes			
	Stakeholders			
	Investigation Preapprovers			
	Investigation Reviewers			

Lastly, enter the Investigation Owner details. Click Save and Close

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overall mainings			Click Save and Close
Notes			· · · · · · · · · · · · · · · · · · ·
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Investigation Owner	Enter Investig	ation Owner details	
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*Target Completion Date		Date Completed	
9/17/2022	50	m/d/yyyy	16
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Delete Incidents

Navigation: Home>My Client Groups>Safety Incidents>Delete

From the home screen, click My Client Groups

Go	Good afternoon, PROD IMPLADMIN!							
Me	My Team	My Client Groups	Benefits Admi	nistration Works	space Risk Man	nagement Sales	Service H	l€ >
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°℃*	Add a Nonworker		Absences	Time Management	Compensation	Goals	Performance	
≌⁄/	Pending Workers							
8	Person		Ň			<u>r</u>		
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Click Safety Incidents

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Additional Person Info Additional Person Info Employment Contracts	(D) Learning	Workforce Structures	Mass Updates	Payroll	₩orkforce Modeling
Contact Info	Workforce Predictions	Click Safety	Incidents Volunteering	Safety Incidents	+

To **Delete** an Incident, from the **Workforce Health and Safety Incidents** screen, select the **X** across from the Incident Name

/orkforce He	alth and Safety Incidents		
	Incidents		+ Add
	Search	Hide Filters Status Open X	
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	Default Criteria V Save	Positive Covid Test Employee John Smith	
		INC-5003	
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	Major	INC-11008	×
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Click Yes

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 ► Even it type Air Quality Fire or Explosion Heath Survey Issue Near Miss 	Multiple Tables Stacked Against The Wall INC - 18001 8/3/2022 252 PM No: Effect on Safety 10/2/2022 No: Owner Open	1 Event 0 Investigations 0 Actions	
Property Damage	Covid 19 Virus		×

View And Add Incident Actions

Navigation: Home>My Client Groups>Safety Incidents>Select Incident>Actions>Add>Submit

From the home screen, click My Client Groups

Go	Good afternoon, PROD IMPLADMIN!								
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۴ ^۲	Hire an Employee		Hiring		Journeys	New Person	Person Management		
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Click Safety Incidents

HCM Experience Design Studio	ළිත් Hiring		Journeys	New Person	Person Management
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Additional Person Info Additional Person Info Employment Contracts Identification Info	(D) Learning	Workforce Structures	Mass Updates	Payroll	and 3 Workforce Modeling
Contact Info	Workforce Predictions	Click Safety	Incidents Volunteering	Safety Incidents	+

To View and Add Incident Actions, select the Incident

Incidents			+ Add
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	fire INC-10001		
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Air Quality	Multiple Tables Stacked Against The Wall INC-18001		

Click Actions

✓ INC-5003				6.0
If Image: Details Image: Details	Incident Details Summary Positive Corid Test Employee John Smith Date and Time 12/30/2021 9-43 PM Description Immediate Actions Lessons Learned Incident Reporter Employee Reporter Name Starb (hamma)	Level of Severity Hazardous Who was notified? Notification Time 12/30/2019 1943 PM	Eda 🔨	
	Incident Location Risk Assessment		~	
	Agencies Notified		~	

Here we can view the **Actions** associated to this incident. To add and action, click **Add**

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<	INC-5003	
lé		
	Details	Actions Click Add
	Events	There's nothing here so far.
ŴŎ	Investigations	
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Enter Action Details

			11 111 10 10000
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Scroll down to enter the additional Action details. You can enter information in these areas by expanding each section. The information required in these sections will depend on your configurations.

Create Action					Save
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Enter Action Owners details, click Save and Close

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Reports And Dashboards

Navigation: Home>Tools>Reports and Analytics>Browse Catalog

From the home screen, click **Tools**

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QUICK ACTIONS	APPS Click	Tools			
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Click Reports and Analytics

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Click Browse Catalog



From the **Dashboards** drop down, click **Health And Safety Business Process Dashboard**



Here you can view the **Dashboard Analytics** for the Health & Safety Module

Health And Safety Business Pro	cess Dashboard		Home Catalog Favorites • Dashboards • Create • (
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Thank you for reviewing and using our guide; we hope you have found it helpful. If you have any questions on the content included in this guide, please contact our Training & Learning team at <u>learn@camptratech.com</u>

Version	Revision		
History	Date	Author	Changes
Version 1.0		Megan Ketter	Initial Version

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