



2024

Health & Safety Admin Guide



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V1

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Guide Usage and Disclosures	2
Guide Information	2
How To Use This Guide	2
Overall Process Flow.....	2
Glossary of Terms	3
Day to Day Operations Guide	6
Report An Incident (Employee)	6
Report An Incident (On Behalf of Employee).....	8
Complete A Health Survey	12
Managing Safety Incidents	14
View And Edit Incident Reports	16
Investigate Incidents	18
Delete Incidents	22
View And Add Incident Actions.....	24
Reports And Dashboards	28

Guide Usage and Disclosures

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.

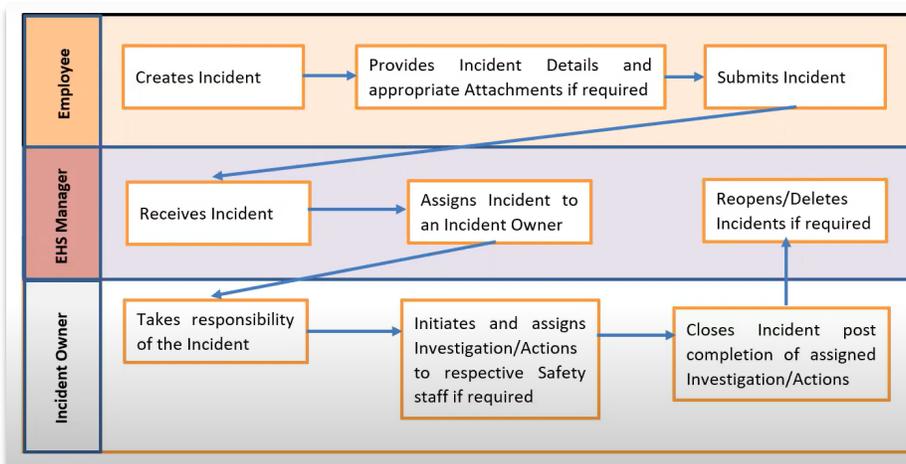
How To Use This Guide

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 Cause, 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

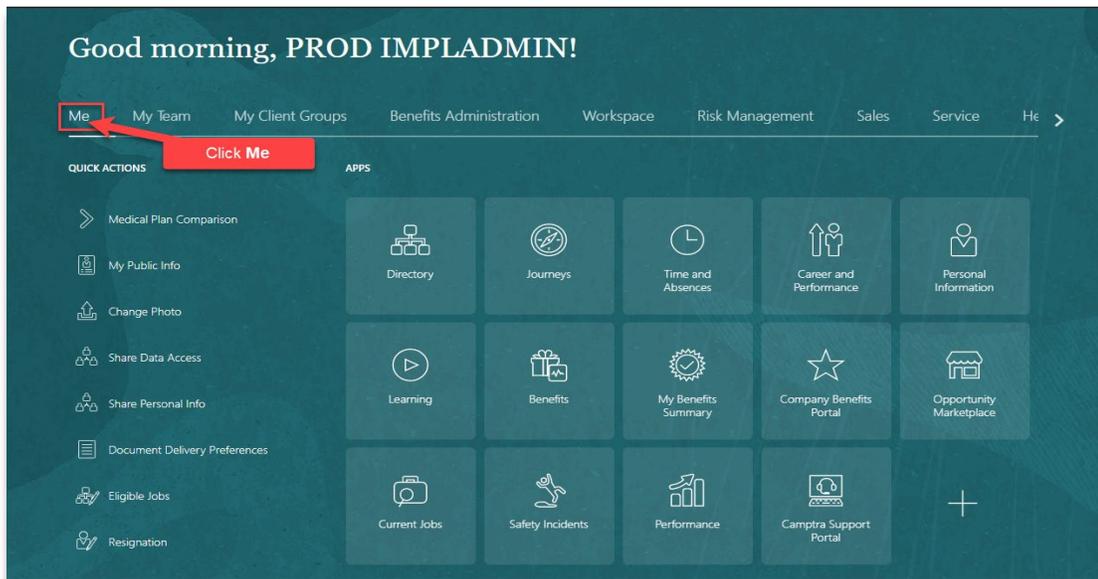
- 👤 A person with an interest or concern in relation to a incident.

Day to Day Operations Guide

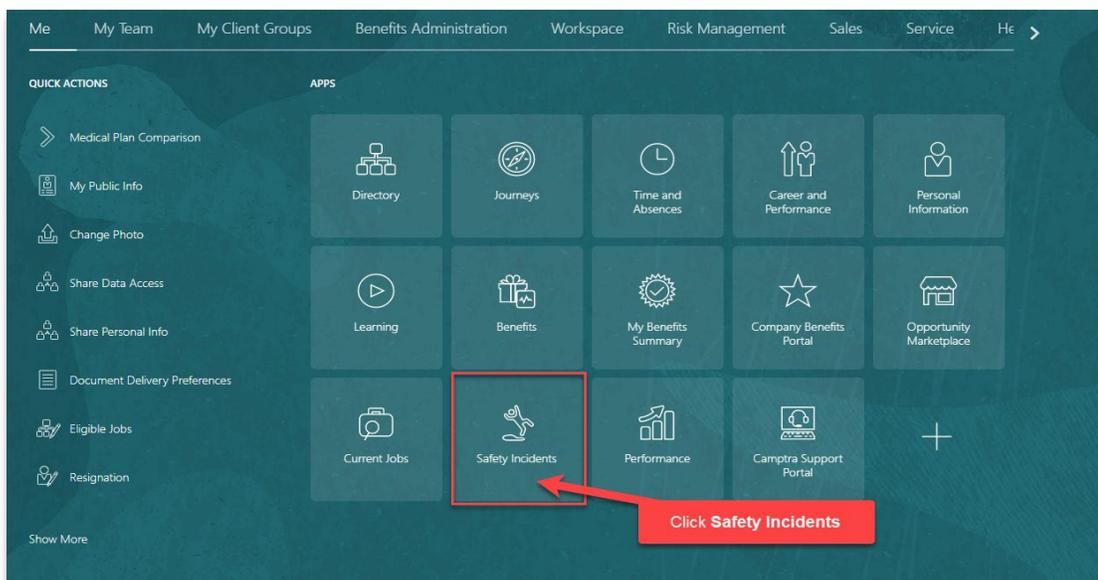
Report An Incident (Employee)

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

From the home screen, click **Me**



Click Safety Incidents



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

The screenshot shows the 'Create Report' interface. At the top left, it says 'Create Report'. At the top right, there is a 'Continue' button. Below the header, there is a red callout box that says 'Click Continue' with an arrow pointing to the 'Continue' button. The main content area has a heading 'Select the Incident Type(s) below' and a list of incident types, each with a checkbox:

- Virus, illness, or Injury (COVID-19)
- 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**

The screenshot shows the 'Incident Details' form. At the top left, it says '1 Incident Details'. At the top right, it says 'Enter the Incident Details Below'. The form contains the following fields:

- *What's the incident?** Text input field containing 'Tables Stacked Against The Walls'.
- Provide more details** Text area containing: 'In 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 someone from facilities please remove these tables? The conference room isn't usable due to this safety issue.'
- Actions already taken** Text area containing: 'I placed a "Do Not Enter Until Further Notice" sign on the door.'
- Level of Severity** Dropdown menu with 'Major' selected.
- Was it on-site or off-site?** Dropdown menu with 'On-site' selected.
- *Where did the incident happen?** Dropdown menu with 'Corporate HQ' selected.
- *Where exactly?** Text input field containing '3rd Floor Conference Room'.
- Address** Text area containing: '123 Main St, Yorba Linda, CA 92887, Orange, United States'.

At the bottom right, there is a red callout box that says 'Click Continue' with an arrow pointing to a green 'Continue' button.

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

Report an Incident Submit

1 Incident Details Edit

2 Who's Reporting This Incident? **Enter information below**

Incident Reporter Employee	*Name Patrick Jones
*When did it happen? 8/2/22 4:00 PM	Who was notified?
Incident Owner Patrick Jones	Notification Time 8/3/22 3:55 PM

Continue

3 Attachments

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 Submit

1 Incident Details Edit

2 Who's Reporting This Incident? Edit

3 Attachments

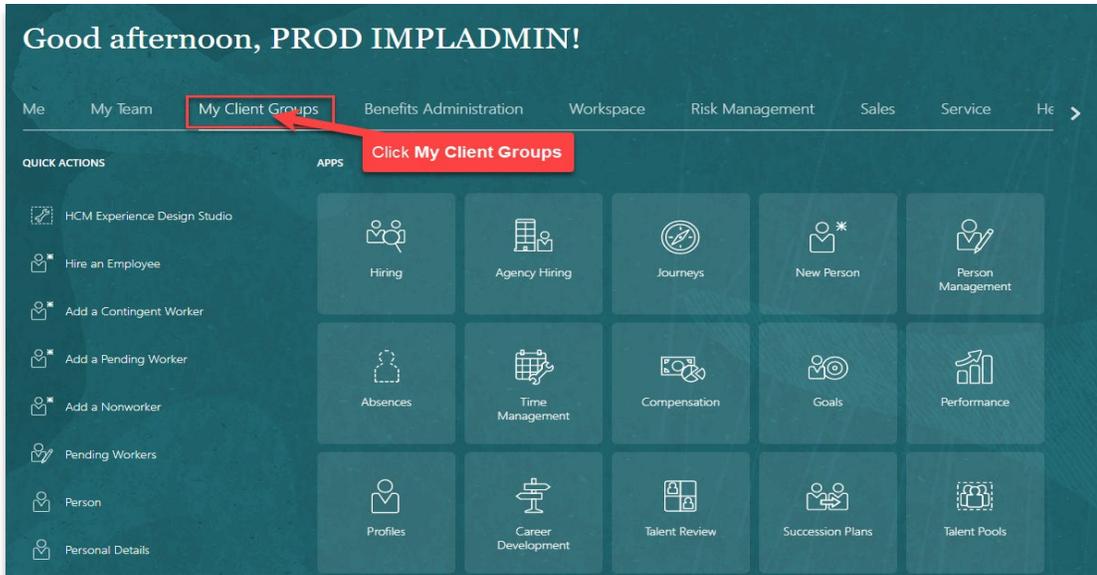
Drag files here or click to add attachment

Click here to upload Attachment

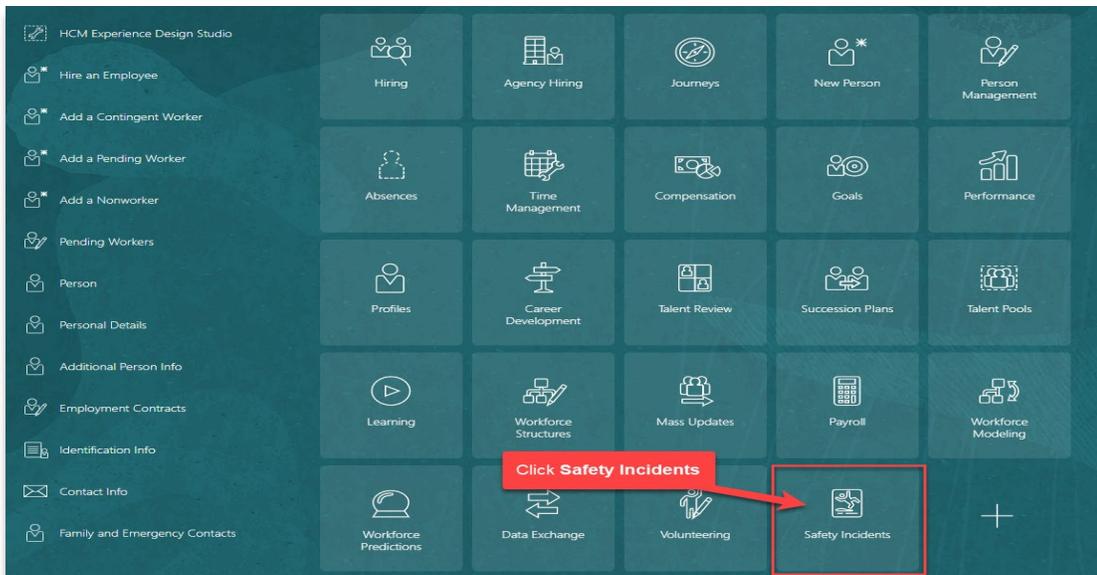
Report An Incident (On Behalf of Employee)

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

From the home screen, click **My Client Groups**



Click Safety Incidents



Click Add

Workforce Health and Safety Incidents

Incidents

Search... Hide Filters Status Open X

Click Add → **+ Add**

Saved Search Default Criteria Save Sort By

Filters	Reset		
Expand All Collapse All			
^ Target Completion Date			
Due in 24 Hours			
Due in 48 Hours			
Due in 7 Days			
Overdue by 24 Hours			
Overdue by 48 Hours			
Overdue by 7 Days			
Range (specify)			
^ Level of Severity			
<input type="checkbox"/> No Effect on Safety			
<input type="checkbox"/> Minor			

Positive Covid Test Employee John Smith INC-5003 12/30/2021 9:43 PM Hazardous 2/28/2022 Overdue No Owner Open	1 Event Overdue 0 Investigations 0 Actions	X
fire INC-10001 2/22/2022 3:50 PM No Effect on Safety 4/23/2022 Overdue No Owner Open	1 Event Overdue 0 Investigations 0 Actions	X
dsgdh INC-10009 2/23/2022 10:52 AM No Effect on Safety 4/24/2022 Overdue No Owner Open	1 Event Overdue 0 Investigations 0 Actions	X
Employee 23 has tested covid positive		X

Create Incident by entering the Incident Details

Create Incident Save

Incident Details **Enter the Incident Details**

*Summary
Liquid Spill on Stairwell

*Date and Time
8/3/2022 4:19 PM

Level of Severity
No Effect on Safety

Description
On the landing area of the 2nd floor stairwell, there is a large wet spot on the floor. It could be a leak from the ceiling.

Immediate Actions
I placed a "Wet Floor" sign on top of the area.

Lessons Learned

Incident Reporter
Employee

Who was notified?
Patrick Jones

*Reporter Name
Rakesh Jhindal

Notification Time
8/3/2022 4:19 PM

Scroll down to enter the Incident Location details

Create Incident Save

Incident Location Enter the Incident Location details

<p>Location</p> <p>On-site <input type="text"/></p> <p>*Location Name</p> <p>Corporate HQ <input type="text"/></p>	<p>Address</p> <p>123 Main St Yorba Linda, CA 92887 Orange United States</p> <p>*Specific Location</p> <p>2nd Floor Stairwell Landing <input type="text"/></p>
--	--

Conditions

Facility Closed or Operations Ceased

Emergency Action Plan Activated

Evacuation

Business Continuity Plan Activated

Risk Assessment

Agencies Notified

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

Attachments

Notes

Incident Reviewers

Incident Approvers

Incident Owner

<p>*Incident Owner</p> <p>Patrick Jones <input type="text"/></p> <p>*Target Completion Date</p> <p>10/2/2022 <input type="text"/></p>	<p>Completed</p> <p><input type="checkbox"/></p> <p>Date Completed</p> <p>m/d/yyyy <input type="text"/></p> <p>Action Required</p>
---	---

Expand Each Section Here

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

Agencies Notified

Related Incidents

Attachments

Notes

Incident Reviewers

Incident Approvers

Incident Owner **Enter the Incident Owner Details**

* Incident Owner
Patrick Jones

* Target Completion Date
10/2/2022

Completed

Date Completed
m/d/yyyy

Action Required

Save Save and Close

Click Save and Close

Complete A Health Survey

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

From the home screen, click **Me**

Good morning, PROD IMPLADMIN!

Me My Team My Client Groups Benefits Administration Workspace Risk Management Sales Service He >

Click Me

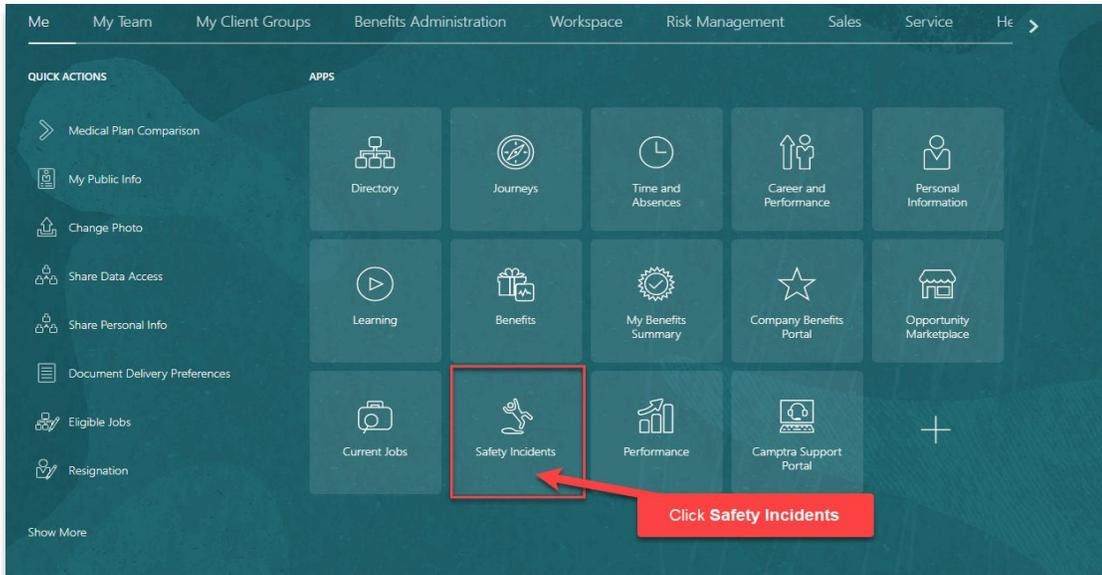
QUICK ACTIONS

- Medical Plan Comparison
- My Public Info
- Change Photo
- Share Data Access
- Share Personal Info
- Document Delivery Preferences
- Eligible Jobs
- Resignation

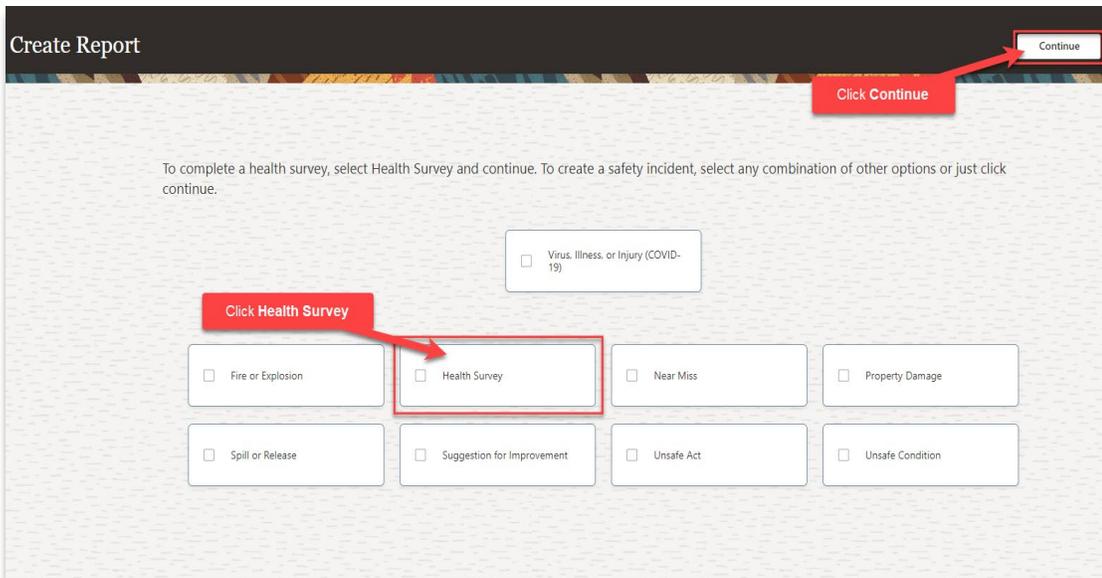
APPS

- Directory
- Journeys
- Time and Absences
- Career and Performance
- Personal Information
- Learning
- Benefits
- My Benefits Summary
- Company Benefits Portal
- Opportunity Marketplace
- Current Jobs
- Safety Incidents
- Performance
- Campra Support Portal

Click **Safety Incidents**



Click **Health Survey**. Click **Continue**



Complete the **Health Survey Details** and click **Submit**

Complete the Health Survey

Cancel **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

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:

Click Submit

Managing Safety Incidents

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

From the home screen, click **My Client Groups**

Good afternoon, PROD IMPLADMIN!

Me My Team **My Client Groups** Benefits Administration Workspace Risk Management Sales Service He >

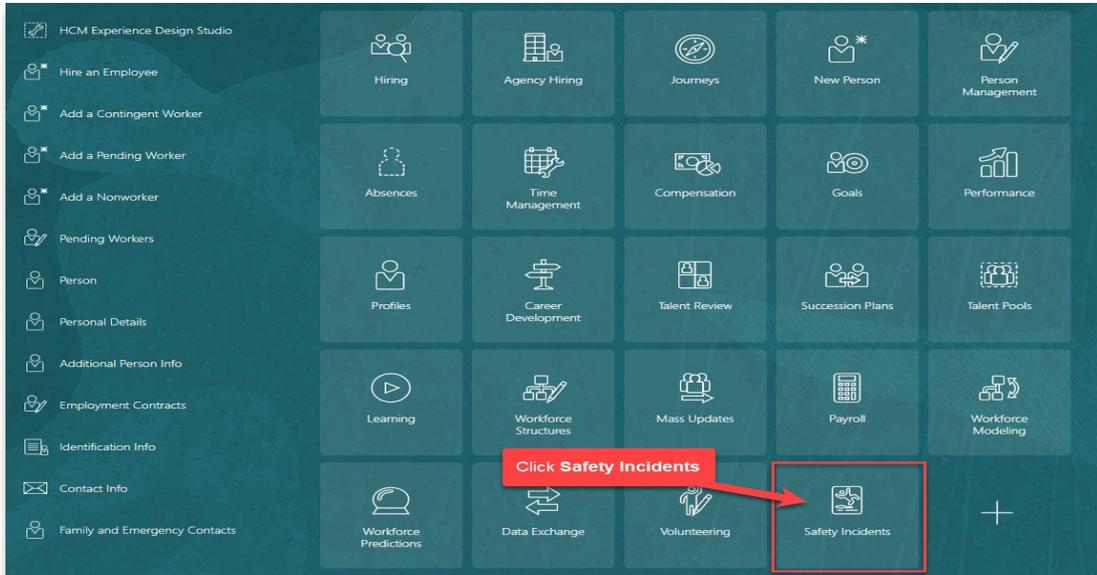
Click My Client Groups

QUICK ACTIONS

APPS

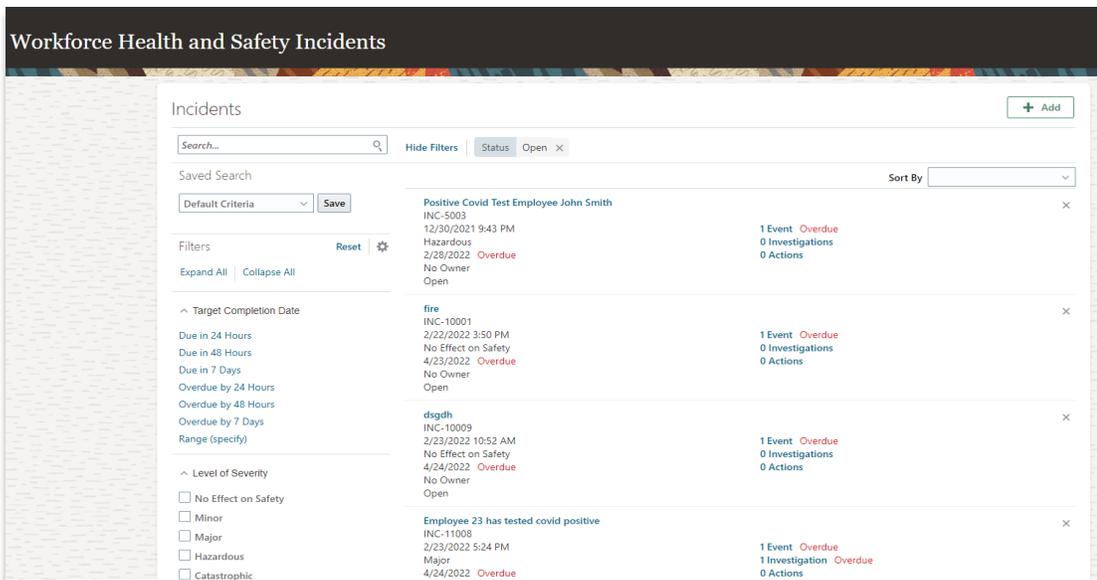
HCM Experience Design Studio	Hiring	Agency Hiring	Journeys	New Person	Person Management
Hire an Employee	Absences	Time Management	Compensation	Goals	Performance
Add a Contingent Worker	Profiles	Career Development	Talent Review	Succession Plans	Talent Pools
Add a Pending Worker					
Add a Nonworker					
Pending Workers					
Person					
Personal Details					

Click **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:

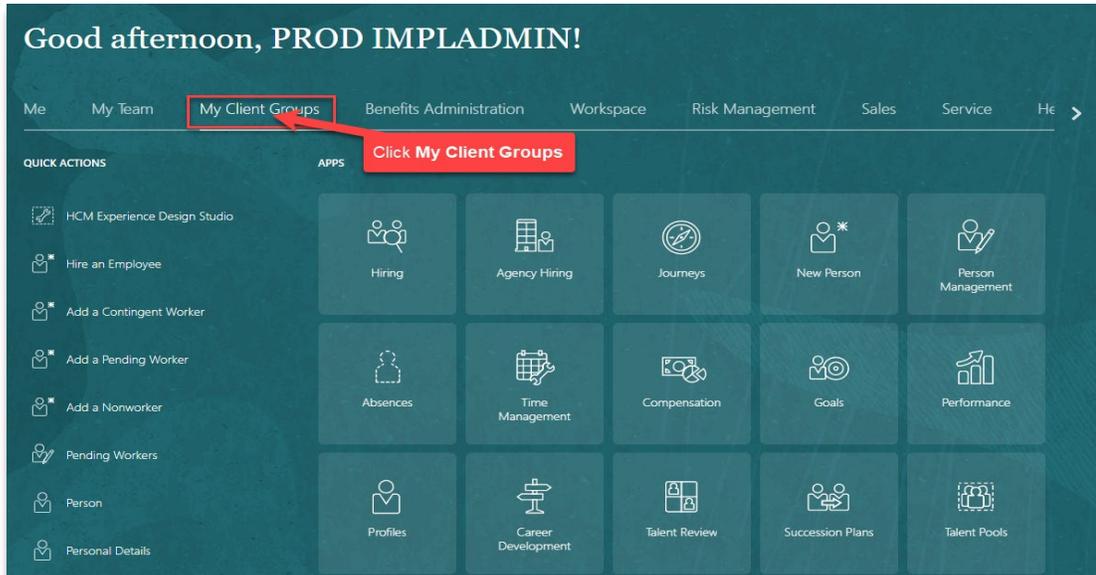
- ❖ Incident Name or Number (Enter the Name or Incident Number in the search bar)
- ❖ Target Completion Date
- ❖ Level of Severity
- ❖ Event Type
- ❖ Location
- ❖ Status
- ❖ When Incident Was Reported?
- ❖ Saved Searches



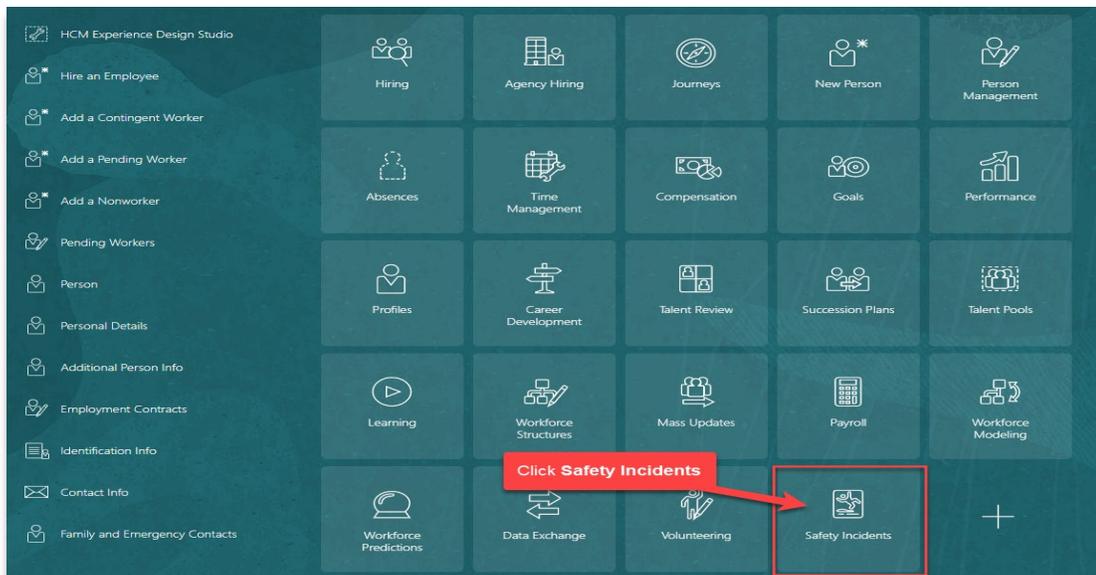
View And Edit Incident Reports

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

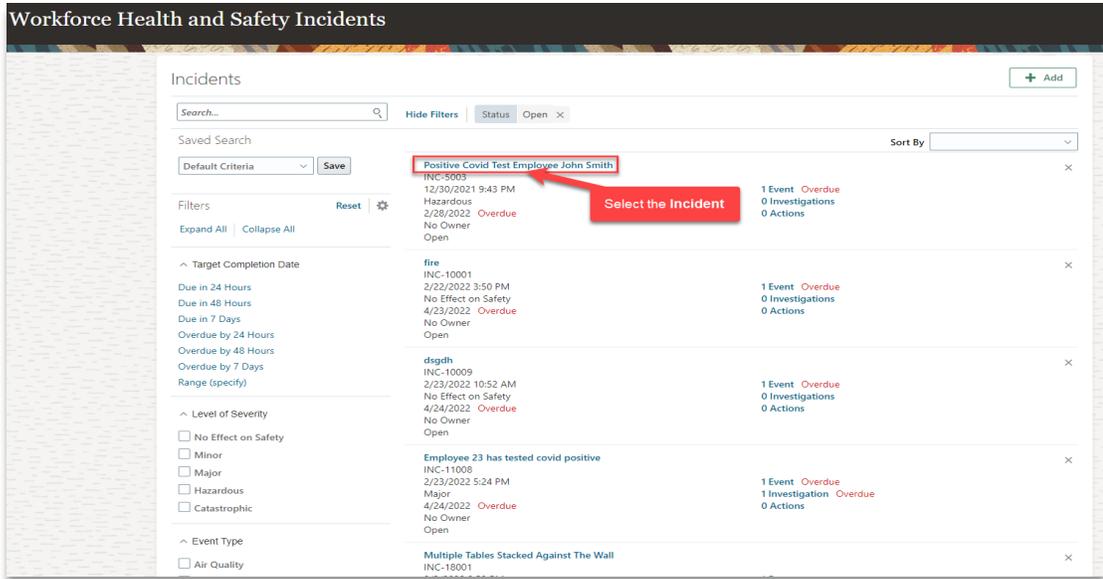
From the home screen, click **My Client Groups**



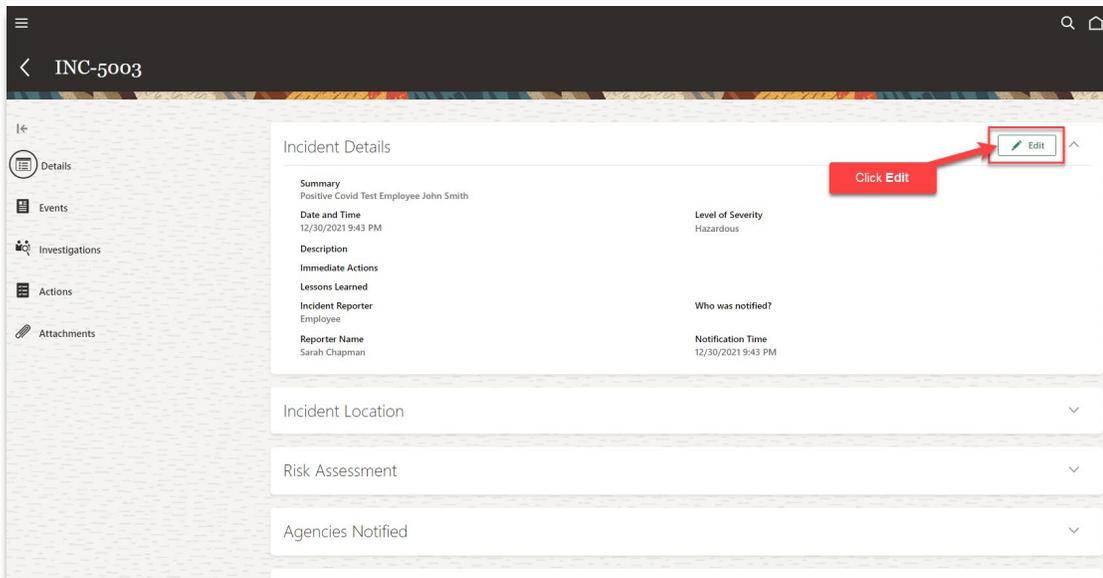
Click **Safety Incidents**



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



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



Update the applicable information. Click **Save**

INC-5003

Incident Details Update the applicable information below

* Summary
Positive Covid Test Employee John Smith

* Date and Time
12/30/2021 9:43 PM

Level of Severity
Hazardous

Description

Immediate Actions

Lessons Learned

Incident Reporter
Employee

Who was notified?
Notification Time

* Reporter Name

Save Cancel

Click Save

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 Administration Workspace Risk Management Sales Service He >

QUICK ACTIONS

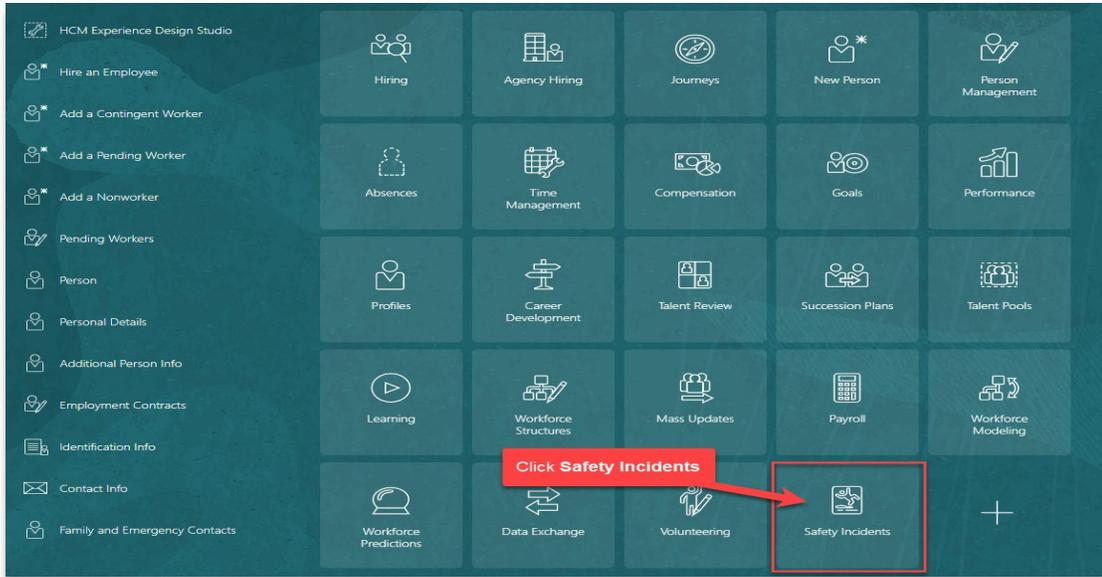
APPS **Click My Client Groups**

Hiring Agency Hiring Journeys New Person Person Management

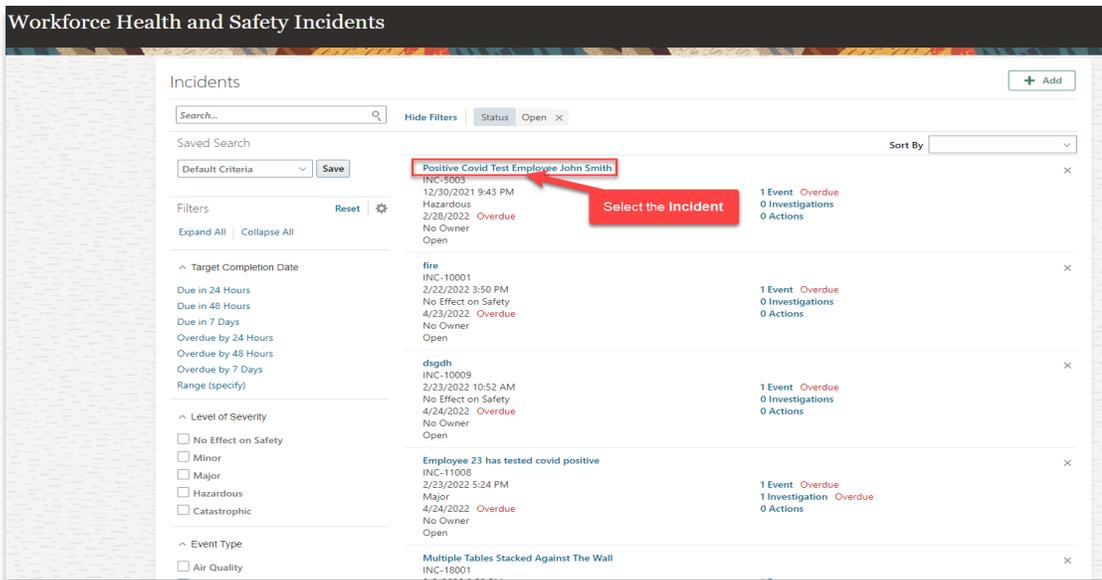
Absences Time Management Compensation Goals Performance

Profiles Career Development Talent Review Succession Plans Talent Pools

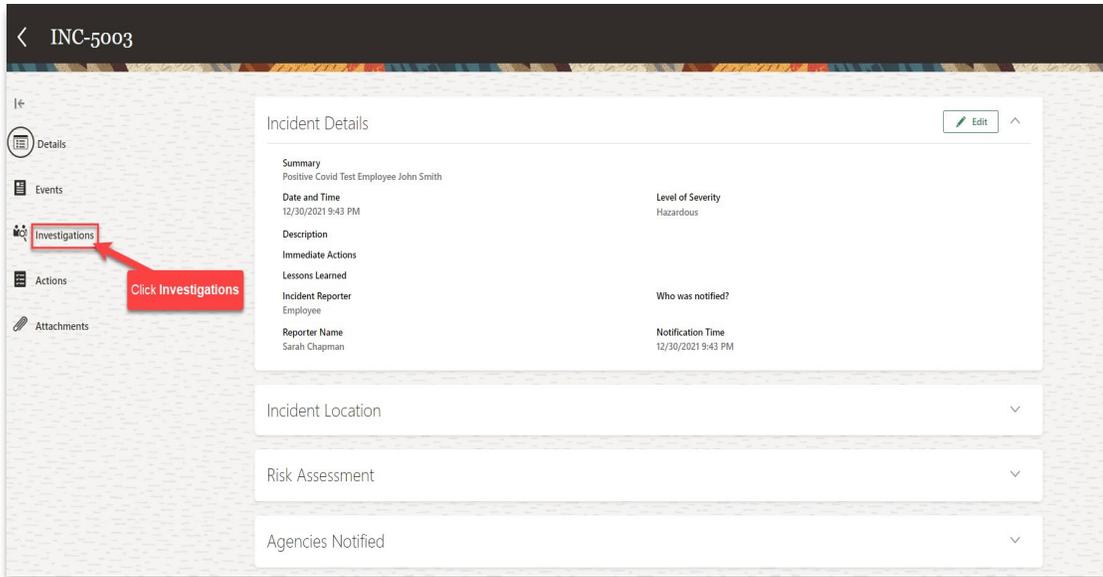
Click **Safety Incidents**



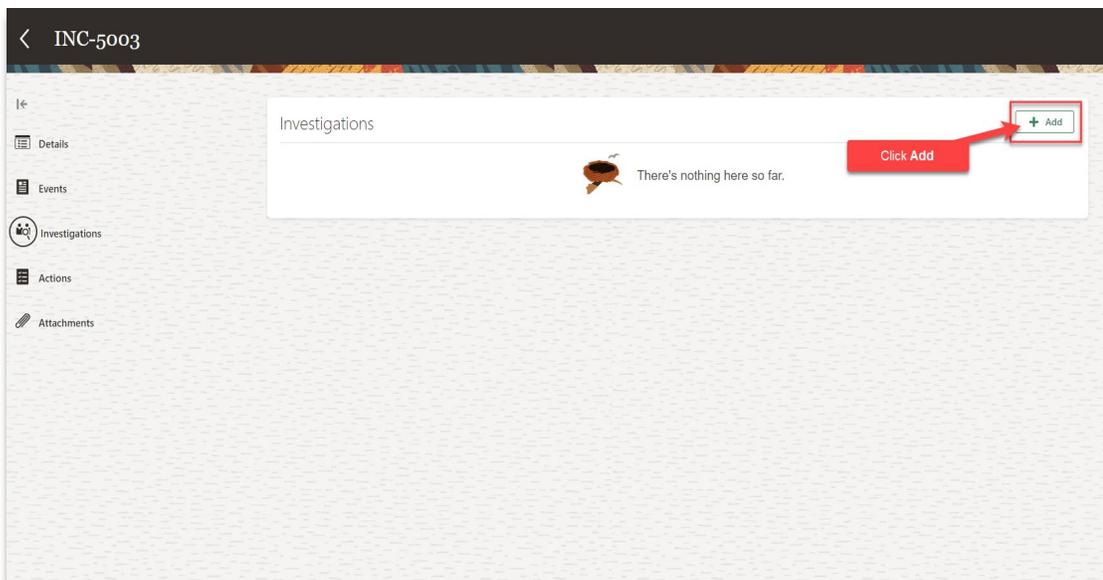
To Create Investigation, from the **Workforce Health and Safety Incidents** screen, select the **Incident**



Click **Investigations**



Click Add



Enter the Investigation Details

Create Investigation Save

Investigation Details Enter the Investigation Details

*Summary

*Date and Time

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 Save Save and Close

Lessons Learned

Investigation Questionnaire ▼

Findings ▼

Overall Findings ▼

Notes ▼

Stakeholders ▼

Investigation Preapprovers ▼

Investigation Reviewers ▼

Expand Each Section Here

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

Create Investigation Save Save and Close

Overall Findings Click Save and Close

Notes

Stakeholders

Investigation Preapprovers

Investigation Reviewers

Investigation Approvers

Investigation Owner Enter Investigation Owner details

*Name Completed

*Target Completion Date Date Completed Action Required

Delete Incidents

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

From the home screen, click **My Client Groups**

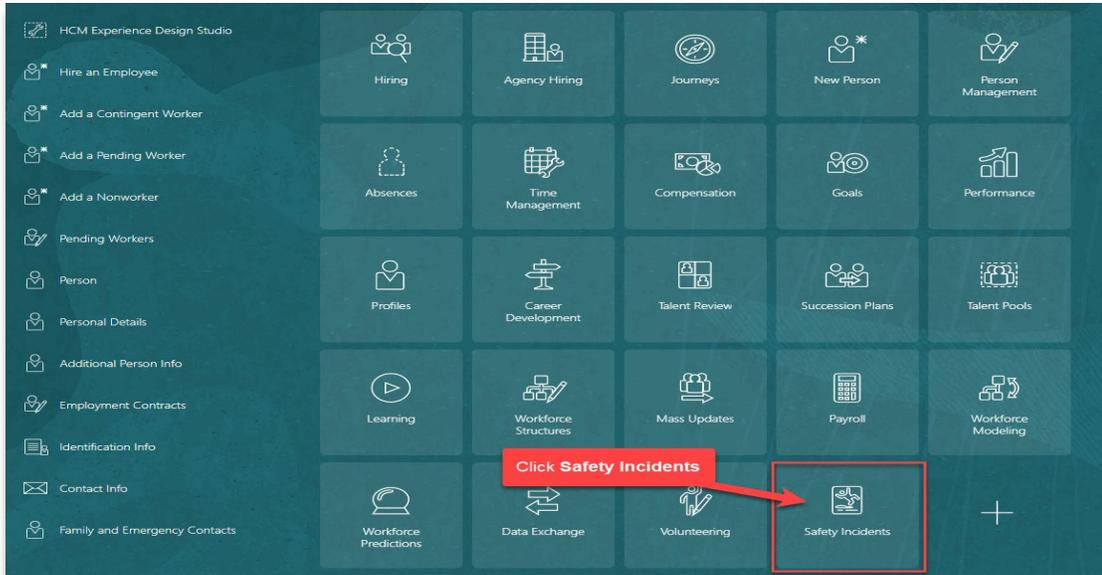
Good afternoon, PROD IMPLADMIN!

Me My Team **My Client Groups** Benefits Administration Workspace Risk Management Sales Service He >

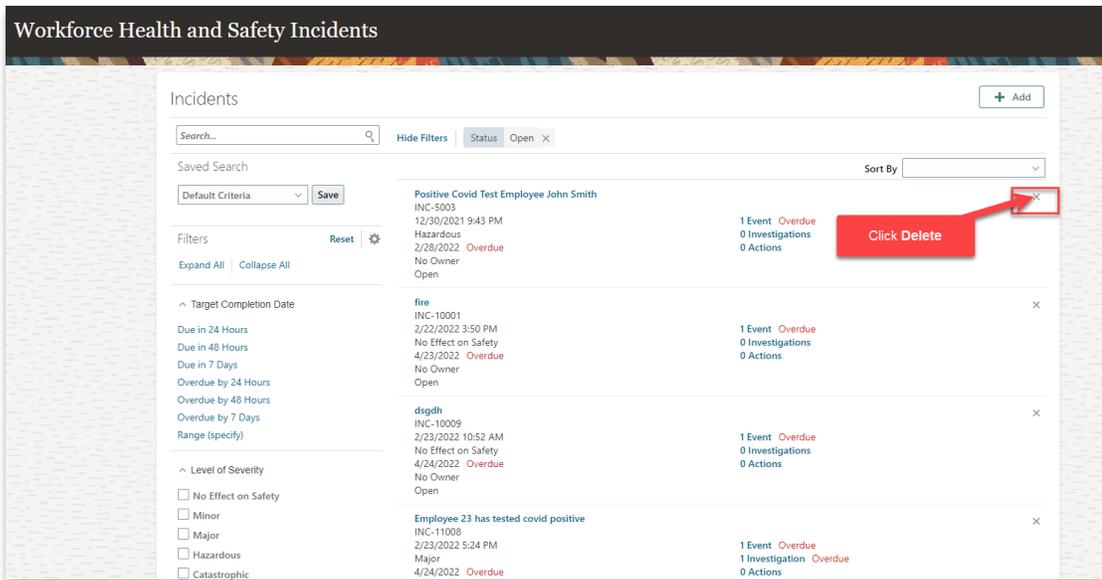
QUICK ACTIONS APPS Click My Client Groups

HCM Experience Design Studio	Hiring	Agency Hiring	Journeys	New Person	Person Management
Hire an Employee	Absences	Time Management	Compensation	Goals	Performance
Add a Contingent Worker	Profiles	Career Development	Talent Review	Succession Plans	Talent Pools
Add a Pending Worker					
Add a Nonworker					
Pending Workers					
Person					
Personal Details					

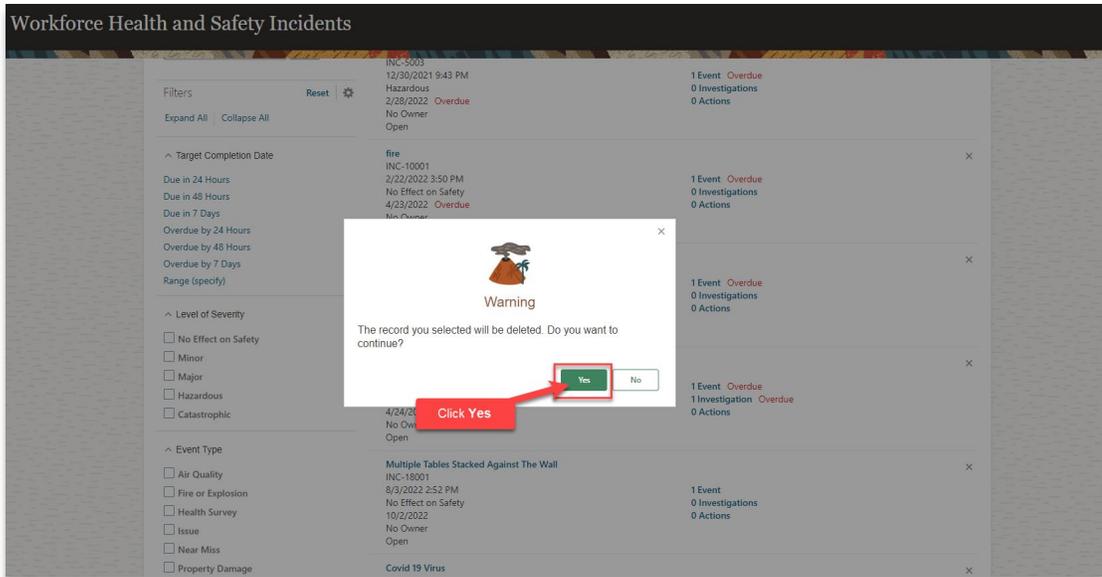
Click **Safety Incidents**



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



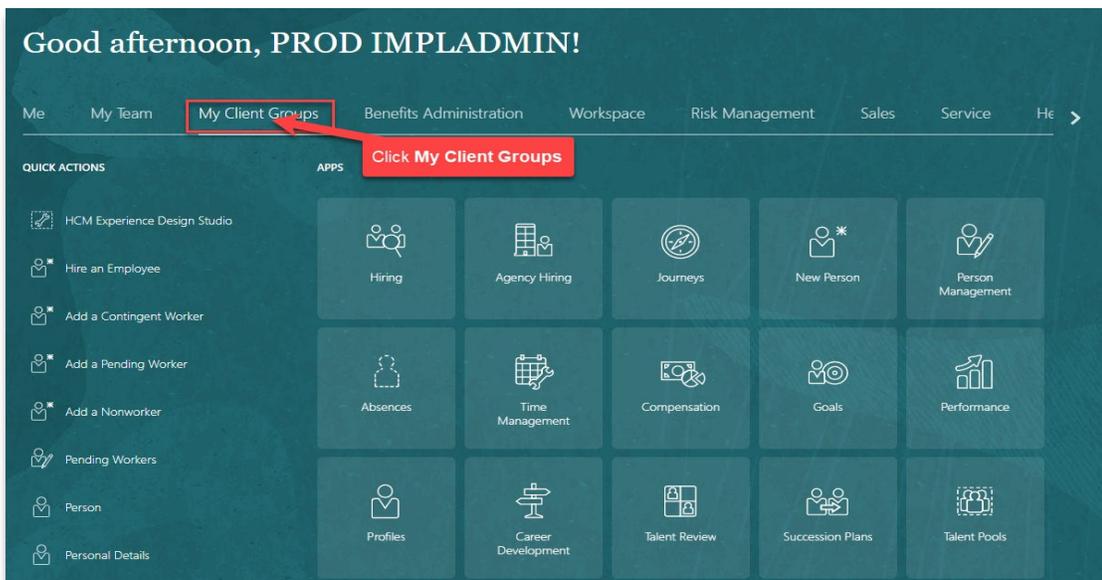
Click Yes



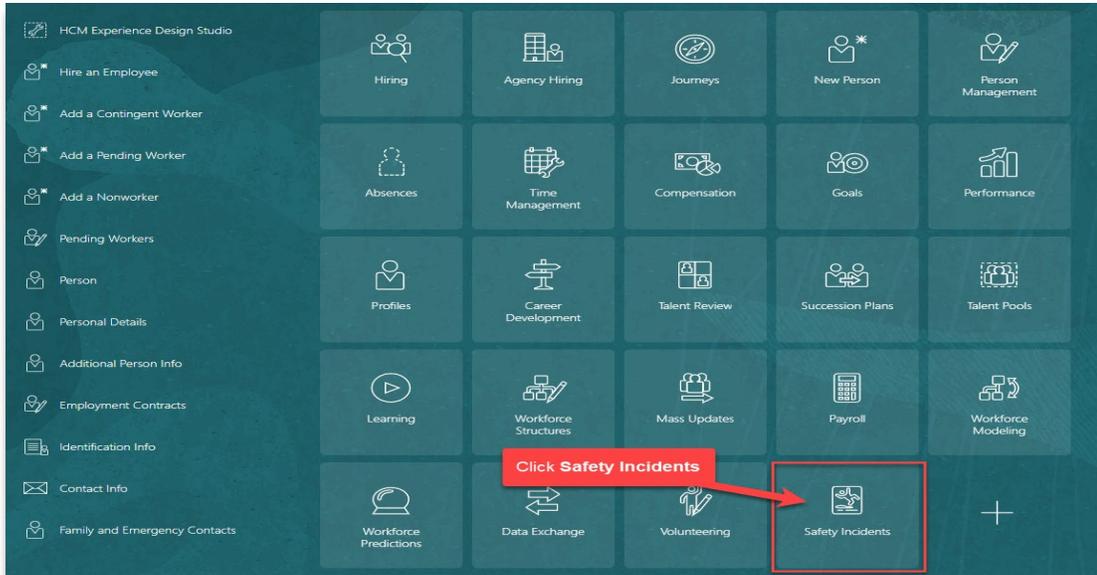
View And Add Incident Actions

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

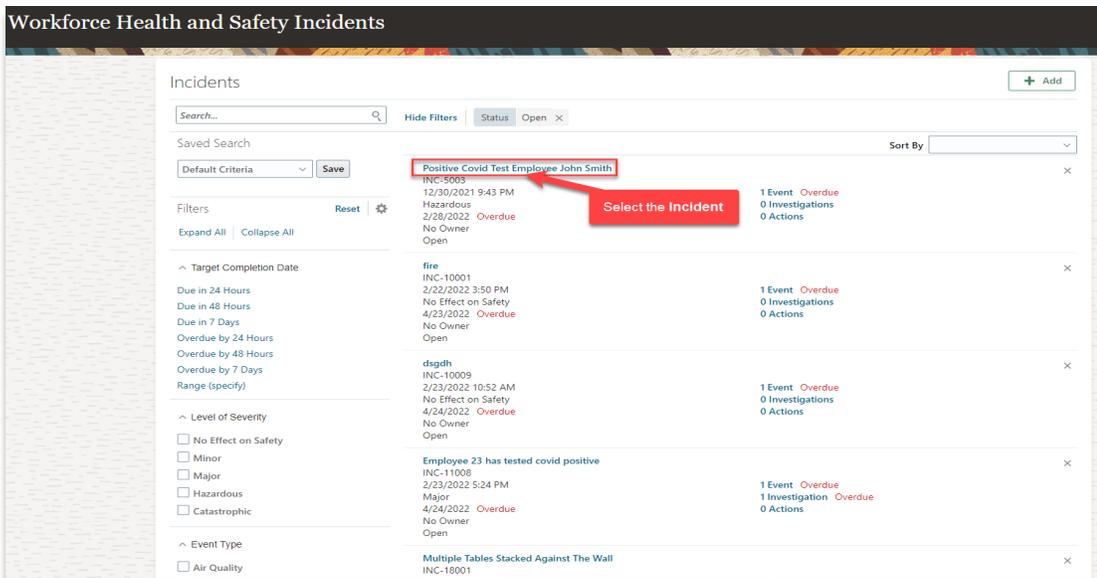
From the home screen, click **My Client Groups**



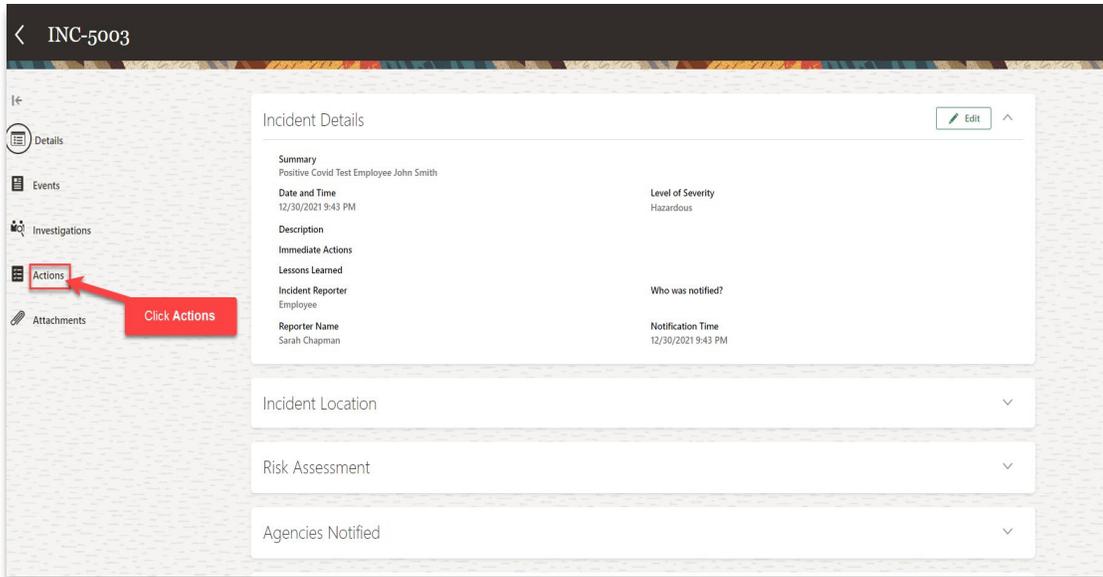
Click **Safety Incidents**



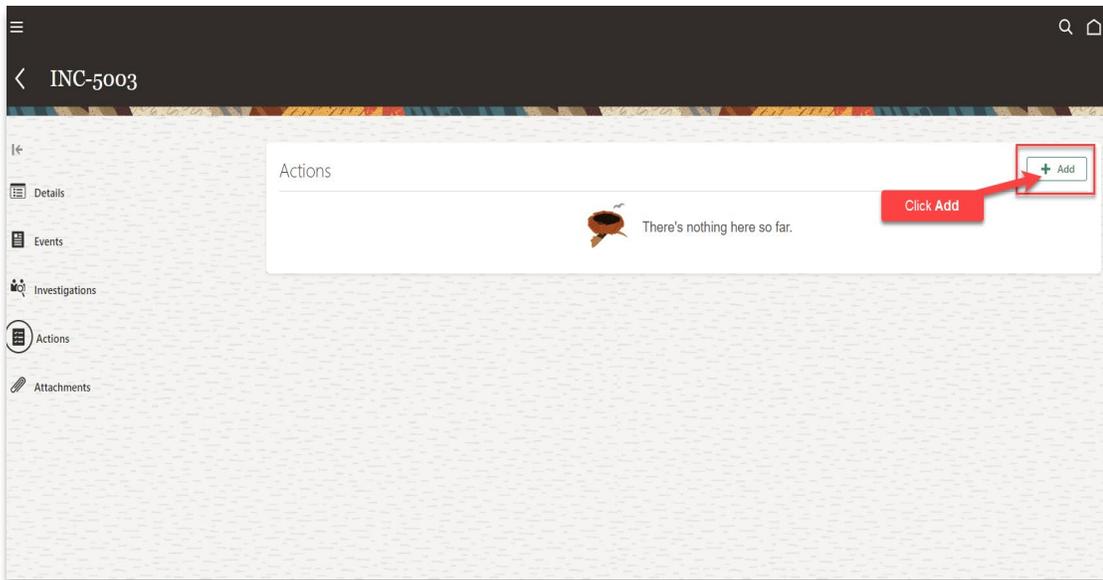
To View and Add Incident Actions, select the Incident



Click Actions



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



Enter Action Details

Create Action Save

Action Details Enter the Action Details

*Summary

*Date and Time
 8/3/2022 6:39 PM

Description

*Action Type
 Corrective

Resources Required

*Priority
 Medium

Estimated Cost
 USD US Dollar

Lessons Learned

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

Notes

Stakeholders

Action Preapprovers

Action Reviewers

Action Approvers

Action Owners

*Action Owners

*Target Completion Date
 9/2/2022

Completed

Date Completed
 m/d/yyyy

Action Required

Expand Each Section Here

Enter Action Owners details, click Save and Close

Save Save and Close

Click Save and Close

Notes

Stakeholders

Action Preapprovers

Action Reviewers

Action Approvers

Action Owners **Enter Action Owners Details**

*Action Owners

Completed

Date Completed

9/2/2022

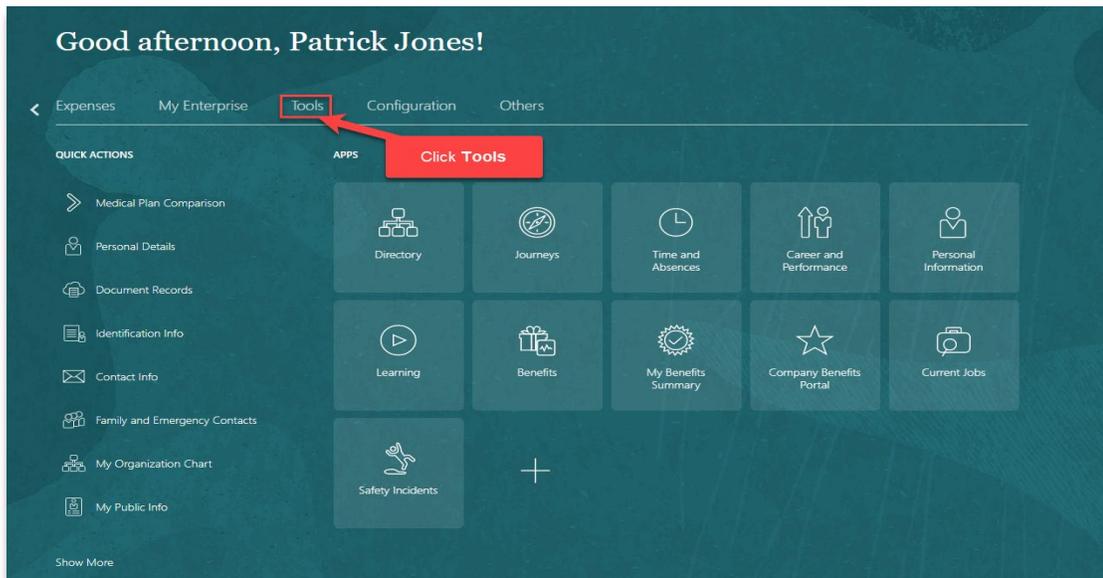
m/d/yyyy

Action Required

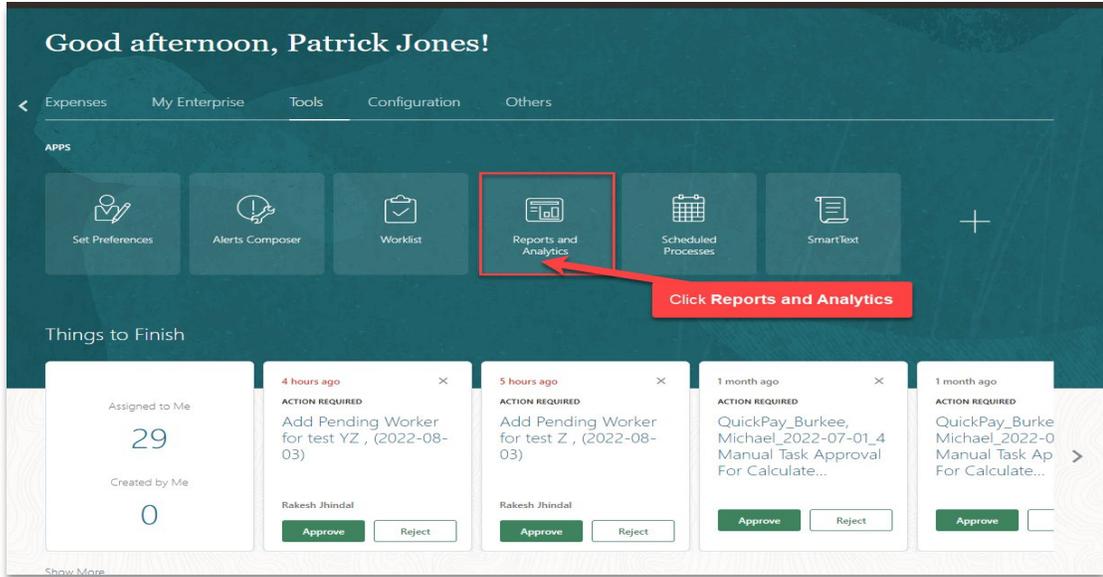
Reports And Dashboards

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

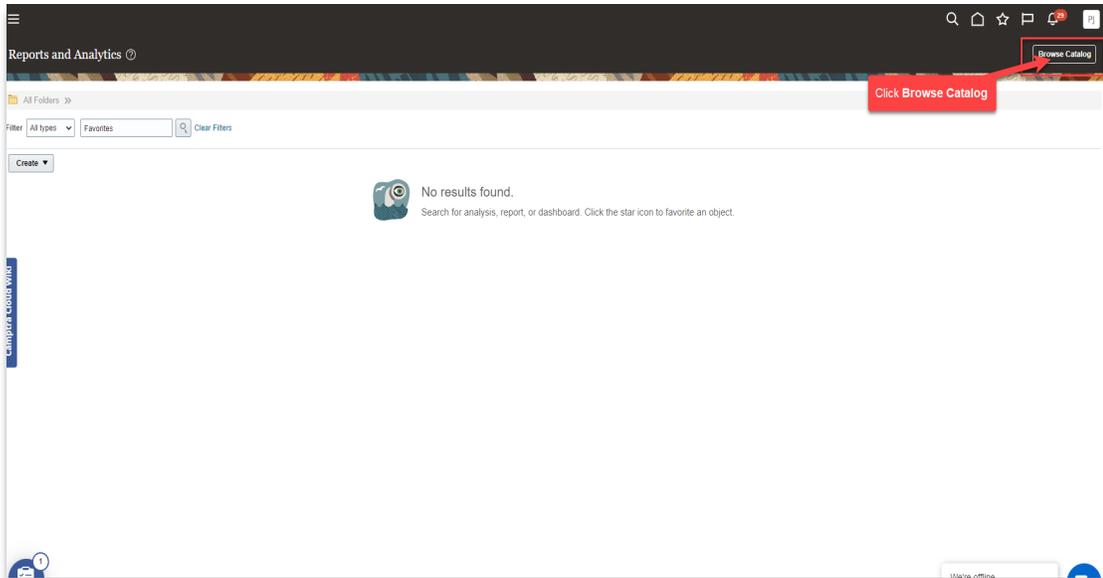
From the home screen, click **Tools**



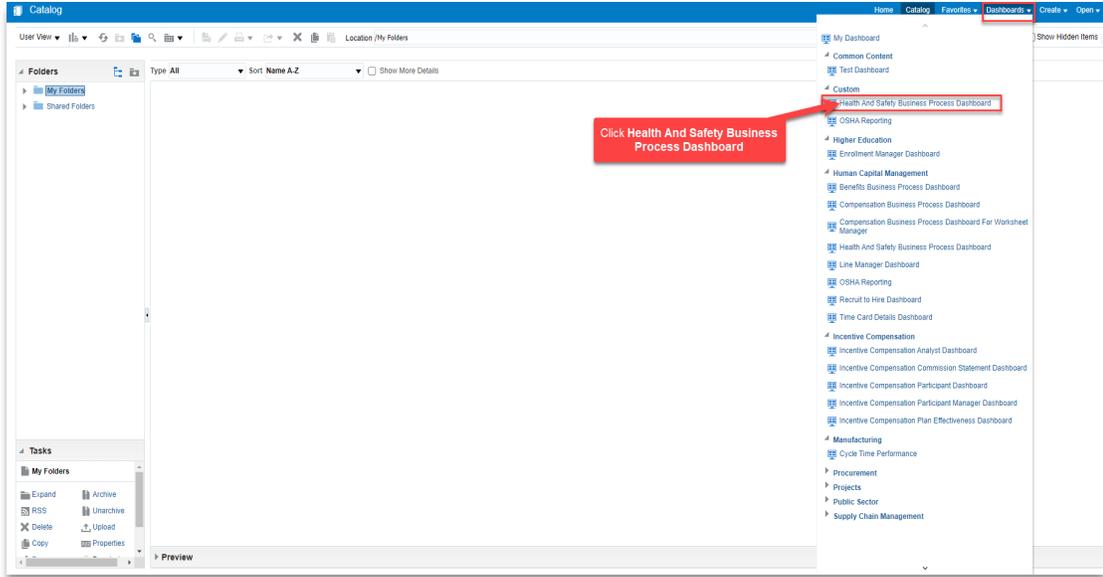
Click **Reports and Analytics**



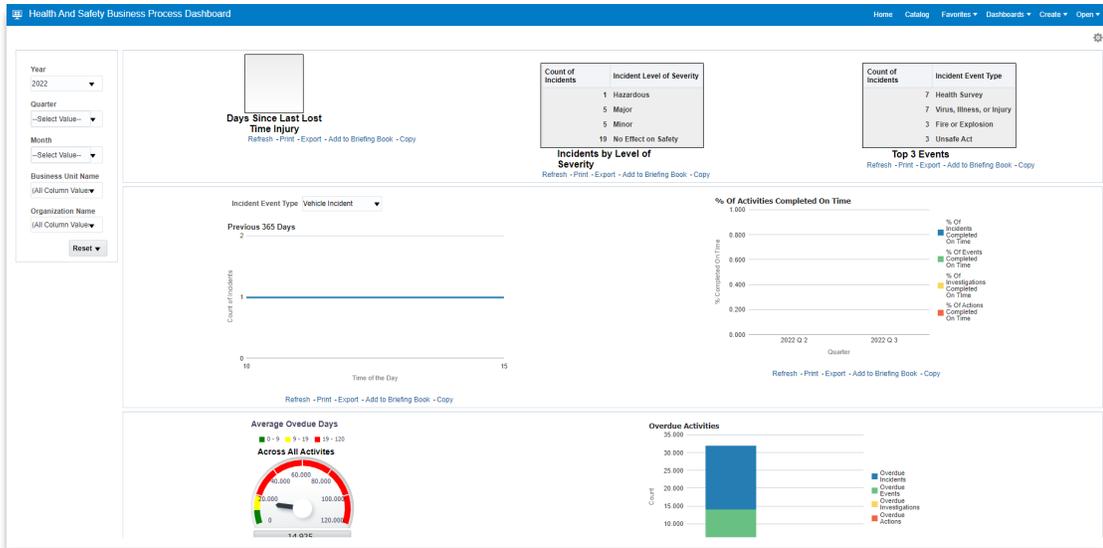
Click Browse Catalog



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



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



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 learn@campratech.com

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

