



PeopleSoft 8.8

Human Resources PeopleBook: Monitor Health and Safety

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Monitor Health and Safety
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About This PeopleBook

PeopleBooks provide you with the information that you need to implement and use PeopleSoft applications.

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Related documentation.
- Typographical elements and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

Note. PeopleBooks document only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line. Elements that are common to all PeopleSoft applications are defined in this preface.

PeopleSoft Application Prerequisites

To benefit fully from the information that is covered in these books, you should have a basic understanding of how to use PeopleSoft applications.

See *Using PeopleSoft Applications*.

You might also want to complete at least one PeopleSoft introductory training course.

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft windows, menus, and pages. You should also be comfortable using the World Wide Web and the Microsoft Windows or Windows NT graphical user interface.

These books do not review navigation and other basics. They present the information that you need to use the system and implement your PeopleSoft applications most effectively.

PeopleSoft Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft database. However, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Each PeopleSoft product line has its own version of this documentation.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across a product line. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals, such as setting up control tables and administering security.

Related Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on the PeopleSoft Customer Connection Website. Through the Documentation section of PeopleSoft Customer Connection, you can download files to add to your PeopleBook Library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM.

Important! Before you upgrade, you must check PeopleSoft Customer Connection for updates to the upgrade instructions. PeopleSoft continually posts updates as the upgrade process is refined.

See Also

PeopleSoft Customer Connection Website, <http://www.peoplesoft.com/corp/en/login.asp>

Ordering Printed Documentation

You can order printed, bound volumes of the complete PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM. PeopleSoft makes printed documentation available for each major release shortly after the software is shipped. Customers and partners can order printed PeopleSoft documentation by using any of these methods:

- Web
- Telephone
- Email

Web

From the Documentation section of the PeopleSoft Customer Connection Website, access the PeopleSoft Press Website under the Ordering PeopleBooks topic. The PeopleSoft Press Website is a joint venture between PeopleSoft and Consolidated Publications Incorporated (CPI), the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

Telephone

Contact CPI at 800 888 3559.

Email

Send email to CPI at psoftpress@cc.larwood.com.

See Also

PeopleSoft Customer Connection Website, <http://www.peoplesoft.com/corp/en/login.asp>

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.

Typographical Conventions

The following table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
<i>Italics</i>	Indicates field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number <i>O</i> , not the letter <i>O</i> .
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press W.
Monospace font	Indicates a PeopleCode program or other code example.
(quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.

Typographical Convention or Visual Cue	Description
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ().
[] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.
(ISO)	Information that applies to a specific country, to the U.S. federal government, or to the education and government market, is preceded by a three-letter code in parentheses. The code for the U.S. federal government is USF; the code for education and government is E&G, and the country codes from the International Standards Organization are used for specific countries. Here is an example: (DEU) If you're administering German employees, German law requires you to indicate special nationality and citizenship information for German workers using nationality codes established by the German DEUEV Directive.
Cross-references	PeopleBooks provide cross-references either below the heading See Also or on a separate line preceded by the word <i>See</i> . Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Visual Cues

PeopleBooks contain the following visual cues.

Notes

Notes indicate information that you should pay particular attention to as you work with the PeopleSoft system.

Note. Example of a note.

A note that is preceded by *Important!* is crucial and includes information that concerns what you must do for the system to function properly.

Important! Example of an important note.

Warnings

Warnings indicate crucial configuration considerations. Pay close attention to warning messages.

Warning! Example of a warning.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about PeopleBooks and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft Product Documentation Manager PeopleSoft, Inc. 4460 Hacienda Drive Pleasanton, CA 94588

Or send email comments to doc@peoplesoft.com.

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

Common Elements in These PeopleBooks

As of Date	The last date for which a report or process includes data.
Business Unit	An ID that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.
Description	Enter up to 30 characters of text.
Effective Date	The date on which a table row becomes effective; the date that an action begins. For example, to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.
Once, Always, and Don't Run	Select Once to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run. Select Always to run the request every time the batch process runs. Select Don't Run to ignore the request when the batch process runs.

Report Manager	Click to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).
Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
Run	Click to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.
Request ID	An ID that represents a set of selection criteria for a report or process.
User ID	An ID that represents the person who generates a transaction.
SetID	An ID that represents a set of control table information, or TableSets. TableSets enable you to share control table information and processing options among business units. The goal is to minimize redundant data and system maintenance tasks. When you assign a setID to a record group in a business unit, you indicate that all of the tables in the record group are shared between that business unit and any other business unit that also assigns that setID to that record group. For example, you can define a group of common job codes that are shared between several business units. Each business unit that shares the job codes is assigned the same setID for that record group.
Short Description	Enter up to 15 characters of text.

See Also

Using PeopleSoft Applications

PeopleSoft Process Scheduler

PeopleSoft Human Resources: Monitor Health and Safety Preface

This preface discusses:

- PeopleSoft application fundamentals.
- PeopleBook structure.
- Common elements used in this PeopleBook.

Note. This PeopleBook documents only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line.

PeopleSoft Application Fundamentals

The *PeopleSoft Human Resources PeopleBook: Monitor Health and Safety* provides you with implementation and processing information for your PeopleSoft Monitor Health and Safety system. Additionally, essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft Application Fundamentals for HRMS PeopleBook*. Each PeopleSoft product line has its own version of this documentation.

PeopleSoft Application Fundamentals for HRMS PeopleBook consists of important topics that apply to many or all PeopleSoft applications across the PeopleSoft HRMS product line. No matter which PeopleSoft HRMS products you are implementing, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals, such as setting up control tables and administering security.

See Also

PeopleSoft Application Fundamentals for HRMS PeopleBook

PeopleBook Structure

PeopleSoft PeopleBooks follow a common structure. By understanding this structure, you can use this PeopleBook more efficiently.

Chapters	Description
Preface	This is the chapter you're reading now. It explains: • How to use the Application Fundamentals book. • How PeopleBooks are structured. • Common elements that are used in the PeopleBook. For example, if a data field is used on multiple pages, it might be defined only once in this chapter rather than repeatedly throughout the book.
Getting Started With...	This chapter discusses product implementation guidelines. It explains: • The business processes documented within the book. • Integrations between the application and other applications. • A high-level guide to how our documentation maps to the overall implementation process; it does not offer step-by-step guidance on how to perform an actual implementation.
Understanding...	This is an introductory chapter that broadly explains the application and the functionality within the application.
Setup and Implementation	This can be one or more chapters. These chapters contain documentation to assist you in setting up and implementing the application. For example, if functionality X is part of a application, this chapter would be devoted to explaining how to set up functionality X, not necessarily how to use functionality X. You would look to the corresponding business process chapter to learn how to use the functionality. Note. There may be times when a small amount of business process information is included in a setup chapter if the amount of business process documentation was insufficient to create a separate section in the book.

Chapters	Description
Business Process	This can be one or more chapters. These chapters contain documentation that addresses specific business processes with each chapter generally devoted to a specific functional area. For example, if functionality X is part of an application, this chapter would be devoted to explain how the functionality works, not necessarily how to set up functionality X. You would look to the corresponding setup and implementation chapter to learn how to set up the functionality. Note. There may be times when a small amount of setup and implementation information is included in a business process chapter if the amount of setup and implementation documentation was insufficient to create a separate chapter in the book.
Appendixes	(optional) If the book requires it, one or more appendixes might be included in the book. Appendixes contain information considered supplemental to the primary documentation.
Reports Appendix	(optional) This appendix contains an abbreviated list of all of the application's reports. The detailed documentation on the use of these reports is usually included in the related business process chapter.

CHAPTER 1

Getting Started With PeopleSoft Human Resources: Monitor Health and Safety

This chapter provides an overview of PeopleSoft Human Resources: Monitor Health and Safety business processes and discusses PeopleSoft Human Resources: Monitor Health and Safety implementation tasks.

PeopleSoft Monitor Health and Safety Business Processes

The following lists the processes for PeopleSoft Human Resources: Monitor Health and Safety:

- Define injuries and illnesses.
- Define dangerous occurrences and hazards.
- Define medical services information.
- Define work restrictions.
- Track incident and illness information.
- Report incident and illness information.
- (AUS) Establish claims thresholds.
- (CAN) Report to Workers Compensation Board.
- (DEU) Report to Employers Liability Insurance Association.
- (GBR) Report UK Health and Executive information.
- (MEX) Track Mixed Committee information.

We cover these business processes in the business process chapters in this PeopleBook.

Implementing PeopleSoft Human Resources: Monitor Health and Safety

The Monitor Health and Safety table-loading implementation includes setting up the following:

- PeopleSoft HRMS fundamental tables.
- Monitor Health and Safety application tables.
- Additional Monitor Health and Safety application tables.

In the planning phases of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides and table-loading sequences.

Important! The order in which you set up tables required to implement PeopleSoft Human Resources: Monitor Health and Safety may vary; each individual application is not necessarily set up in sequence. For example, you may set up HRMS tables, then tables for the Monitor Health and Safety core application, then several tables specific to the country or industry you operate in, followed by additional Monitor Health and Safety core tables. In addition, the order in which you set up tables may also depend on the features you want to use. The information provided in this chapter offers a high-level guide of how our documentation maps to the overall implementation process; it does not offer step-by-step guidance on how to perform an actual implementation.

Setting Up PeopleSoft HRMS Fundamental Tables

The Monitor Health and Safety business process requires the setup of fundamental HRMS tables, common to multiple HRMS applications. The information that you define on these tables lays the foundation for the Monitor Health and Safety business process setup.

Step	Reference
1. Set up PeopleSoft HRMS fundamental tables.	<i>PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook</i> , “Getting Started With PeopleSoft HRMS”
2. Set up PeopleSoft Human Resources fundamental tables.	<i>PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook</i> , “Getting Started With PeopleSoft HRMS”

Setting Up PeopleSoft Human Resources: Monitor Health and Safety

The steps discussed in this section suggest an order in which you define the information in your core Monitor Health and Safety tables. The information that you defined in your fundamental tables lays the foundation for this setup.

Setting up these core tables prepares your system to support these business processes:

- Define injuries and illnesses.
- Define dangerous occurrences and hazards.
- Define medical services information.
- Define work restrictions.
- Track incident and illness information.
- Report incident and illness information.

Step	Reference
1. Define injuries and illnesses.	Chapter 3, “Defining Incident, Injury, and Illness Tracking,” Defining Injuries and Illnesses, page 7
2. Define dangerous occurrences and hazards.	Chapter 3, “Defining Incident, Injury, and Illness Tracking,” Defining Dangerous Occurrences and Hazardous Conditions, page 11

Step	Reference
3. Define incident details.	Chapter 3, “Defining Incident, Injury, and Illness Tracking,” Defining Related Incident Details, page 15
4. Define medical service information.	Chapter 3, “Defining Incident, Injury, and Illness Tracking,” Defining Medical Services Information, page 17
5. Define work restrictions.	Chapter 3, “Defining Incident, Injury, and Illness Tracking,” Defining Work Restrictions and Modified Work Duties, page 19

Setting Up Additional PeopleSoft Human Resources: Monitor Health and Safety Tables

These steps define information in additional Monitor Health and Safety tables. The information that you define in your core tables lays the foundation for this Monitor Health and Safety-specific set up.

Setting up these additional tables prepares your system to support these business processes and tasks:

- (AUS) Establish Claims Threshold.
- (CAN) Report to Workers’ Compensation Board.
- (DEU) Report to Employers’ Liability Insurance Association.
- (GBR) UK Health and Safety Executive reporting.
- (MEX) Track Mixed Committee information.

Step	Reference
1. (AUS) Establish claims thresholds.	Chapter 4, “Defining Additional Information for Global Incident Reporting,” (AUS) Managing Claims Threshold Details, page 21
2. (CAN) Define Canadian Workers’ Compensation Board reporting.	Chapter 4, “Defining Additional Information for Global Incident Reporting,” (AUS) Managing Claims Threshold Details, page 21
3. (DEU) Set up Employers’ Liability Insurance Association reporting.	Chapter 4, “Defining Additional Information for Global Incident Reporting,” (DEU) Setting Up for Employers’ Liability Insurance Association Reporting, page 27
4. (GBR) Set up United Kingdom Health and Safety Executive reporting.	Chapter 4, “Defining Additional Information for Global Incident Reporting,” (GBR) Setting Up Reporting to the Health and Safety Executive (HSE) in the United Kingdom, page 31
5. (MEX) Set up Mixed Committee information.	Chapter 6, “Creating and Tracking Incidents,” (MEX) Defining Mixed Committees, page 99

CHAPTER 2

Understanding PeopleSoft Monitor Health and Safety

This chapter provides an overview of PeopleSoft Monitor Health and Safety.

Understanding the PeopleSoft Monitor Health and Safety Solution

PeopleSoft Monitor Health and Safety provides you the ability to record and track incidents, injuries, illnesses, and dangerous occurrences at your workplace.

In addition to tracking incidents for your employees, you can also record and track non-employees — employees who were witnesses but who were not actually injured.

PeopleSoft Monitor Health and Safety also provides you with the capability to submit and process medical and examination data to the appropriate reporting agencies.

PeopleSoft Monitor Health and Safety Business Processes

PeopleSoft Human Resources: Monitor Health and Safety supports the following business processes:

- Define injuries and illnesses.
- Define dangerous occurrences and hazards.
- Define medical services information.
- Define work restrictions.
- Track incident and illness information.
- Report incident and illness information.
- (AUS) Establish claims thresholds.
- (CAN) Report to Workers Compensation Board.
- (DEU) Report to Employers Liability Insurance Association.
- (GBR) Report UK Health and Executive information.
- (MEX) Track Mixed Committee information.

PeopleSoft Human Resources: Monitor Health and Safety Integrations

PeopleSoft Human Resources integrates with all the PeopleSoft HRMS applications, with other PeopleSoft applications, and with third-party applications.

PeopleSoft Human Resources shared tables are available to many PeopleSoft HRMS applications. In addition, data in many HR tables is available to any PeopleSoft application that is set up to subscribe to the published messages.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Getting Started With PeopleSoft HRMS”

CHAPTER 3

Defining Incident, Injury, and Illness Tracking

This chapter provides an overview of setting up your system to track incidents, injuries and illnesses and tells you how to define:

- Injuries and illnesses.
- Dangerous occurrences and hazards.
- Related incident details.
- (IND) Disablement types.
- Medical service information.
- Work restriction.

Understanding Incident, Injury, and Illness Tracking

Consistent and uniform data collection is an important element of your organization's health and safety program. Standardized records best utilize the information that you use to manage your health and safety program and to meet government and insurer reporting requirements.

Use PeopleSoft Monitor Health and Safety to track information specific to health and safety incidents that occur in all of your operations, and to update codes and descriptions as government regulations change. Most of the setup tables are designed so that you can enter multiple occurrences of a code or description.

When you create information in these tables, be sure to enter effective dates that are before the effective dates of any incidents that you enter. If you do not ensure this, the system will not display all the valid codes when you select values from prompt lists in the Monitor Health and Safety pages.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Getting Started With PeopleSoft HRMS”

Defining Injuries and Illnesses

Use this section to set up and maintain injury, illness, and accident codes that are required by government reporting agencies.

Certain setup codes in the Monitor Health and Safety business process are entered by setID because they can vary by regulatory region. You can establish different sets of codes for each regulatory region in which you have operations. For example, if you are administering a U.S. workforce, you may choose to use the standard codes the American National Standards Institute (ANSI) has established, or enter your own. Use the codes required by local authorities in your regulatory region, if a specific set of codes is required.

Whereas occupational injuries are generally thought to result from sudden or one-time incidents, occupational illnesses are generally thought to result from longer-term, repeated exposures. The Occupational Illness code is used on the Injury Details - Description page and the DEU Illness Tracking - Medical Details page.

Pages Used to Define Injuries and Illnesses

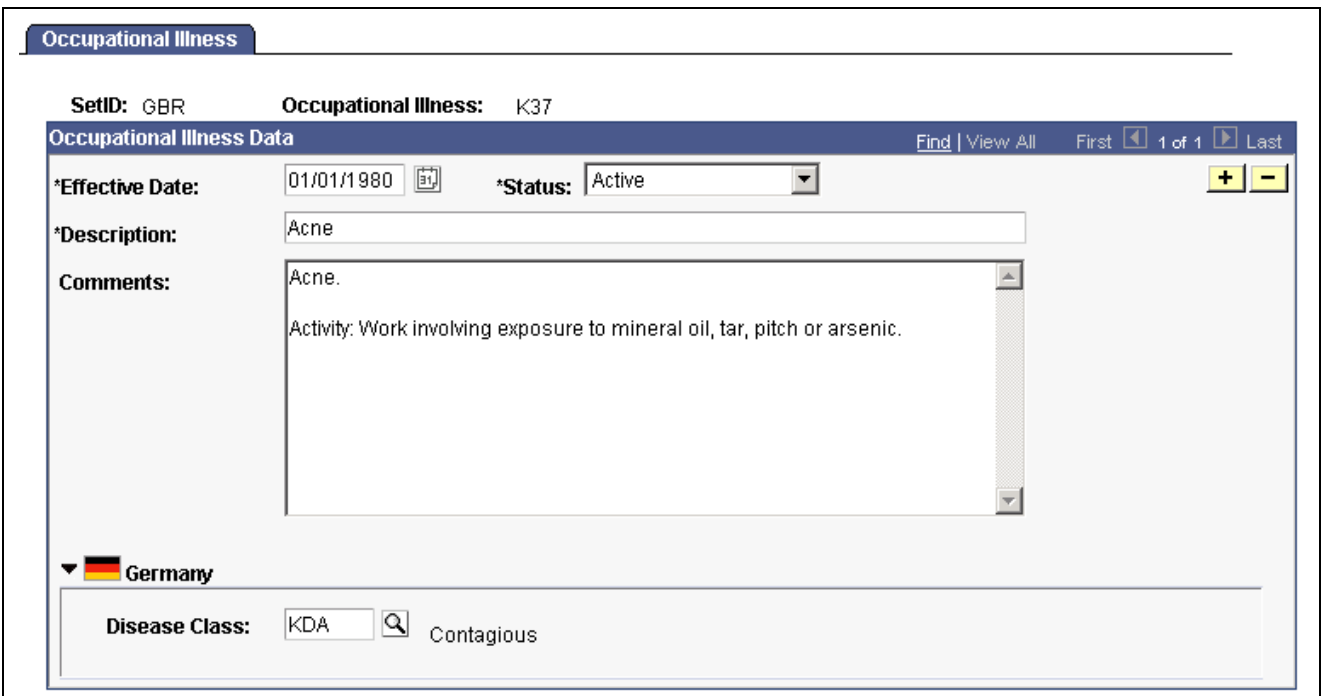
Page Name	Object Name	Navigation	Usage
Accident Type Table	ACCIDENT_TYPE_TBL	- Set Up HRMS, Product Related, Workforce Monitoring, Health and Safety, Accident Type Table - Workforce Monitoring, Health and Safety, Define Accident/Injury Info, Accident Types	Describe the events that can result in physical occupational injuries. Use the Accident Type codes that are used on the Injury Details page, standard codes, or your own company-specific codes.
Body Part Table	BODY_PART_TABLE	- Set Up HRMS, Product Related, Workforce Monitoring, Health and Safety, Body Part Table - Workforce Monitoring, Health and Safety, Define Accident/Injury Info, Body Parts	Identify the physical location of an employee's injury. For example, specify the <i>Jaw</i> as part of the class <i>Face</i> .
Nature of Injury Table	INJURY_NATURE_TBL	- Set Up HRMS, Product Related, Workforce Monitoring, Health and Safety, Nature of Injury - Workforce Monitoring, Health and Safety, Define Accident/Injury Info, Nature of Injury Table	Identify an employee's physical injuries. These codes are used in the Incident Details component.
Source of Injury Table	INJURY_SOURCE_TBL	- Set Up HRMS, Product Related, Workforce Monitoring, Health and Safety, Define Accident/Injury Info, Source of Injury Table - Workforce Monitoring, Health and Safety, Define Accident/Injury Info, Source of Injury	Identify how the injury occurred. These codes are used in the Injury Details page.

Page Name	Object Name	Navigation	Usage
Unsafe Act Table	UNSAFE_ACT_TABLE	- Set Up HRMS, Product Related, Workforce Monitoring, Health and Safety, Unsafe Act Table - Workforce Monitoring, Health and Safety, Define Accident/Injury Info, Unsafe Act Table	Assign codes to the causes of injuries and accidents and track incidents by associating an Unsafe Act code with the resulting Accident Type code. These codes are used on the Injury Details page.
Occupational Illnesses Table	HS_OCC_ILLNESS	- Set Up HRMS, Product Related, Workforce Monitoring, Health and Safety, Occupational Illnesses Table - Workforce Monitoring, Health and Safety, Define Medical Services, Occupational Illnesses	Enter standard types of occupational illnesses.
Occupational Illness	OCC_ILLNESS_FRA	Set Up HRMS, Product Related, Workforce Monitoring, Health and Safety, Occupational Illness Tbl FRA	Enter standard types of occupational illnesses for France.
Diagnosis Table	DIAGNOSIS_TABLE	- Set Up HRMS, Product Related, Workforce Monitoring, Health and Safety, Diagnosis Table - Workforce Monitoring, Health and Safety, Define Medical Services, Diagnosis	Maintain standard medical diagnoses for injuries and illnesses. Track individual injuries and illnesses in the Incident Details and Rehabilitation Plans components.
Allergy Table	ALLERGY_TBL	- Set Up HRMS, Product Related, Workforce Monitoring, Health and Safety, Allergy Table - Workforce Monitoring, Health and Safety, Define Medical Data, Allergy	Define allergy types.
Immunization Table	IMMUN_TBL	- Set Up HRMS, Product Related, Workforce Monitoring, Health and Safety, Immunization - Workforce Monitoring, Health and Safety, Define Medical Data, Immunization	Define immunization types.

Page Name	Object Name	Navigation	Usage
Medication Table	MEDCATN_TBL	- Set Up HRMS, Product Related, Workforce Monitoring, Health and Safety, Medication - Workforce Monitoring, Health and Safety, Define Medical Data, Medication	Define medication types.
Medicare Tbl Aus	MEDICARE_TBL_AUS	- Workforce Monitoring, Health and Safety, Define Medical Services, Medicare Item Details AUS - Set Up HRMS, Product Related, Workforce Monitoring, Health and Safety, Medicare Item Details AUS	Define Medicare items.

Entering Types of Occupational Illnesses

Access the Occupational Illness page.



Occupational Illness

SetID: GBR Occupational Illness: K37

Occupational Illness Data Find | View All First 1 of 1 Last

*Effective Date: 01/01/1980 *Status: Active

*Description: Acne

Comments: Acne.
Activity: Work involving exposure to mineral oil, tar, pitch or arsenic.

▼ Germany

Disease Class: KDA Contagious

Occupational Illness page

Occupational Illness

You can enter different groups of Occupational Illness codes for each setID.

(DEU) Germany

Disease Class

Select a class from the Disease Class Table DEU, if appropriate.

If the disease class that you want to select is not in the list of valid values, then add it into the system using the Disease Class Table DEU page.

Defining Medical Diagnoses

Access the Diagnosis Table page.

The screenshot shows the 'Diagnosis Table' page. At the top, there's a header with 'SetID: GBR' and 'Diagnosis Code: K00001'. Below this is a table with the following data:

Effective Date	Status	Description	Short Description
01/01/1980	Active	Lacerations	Laceration

Navigation buttons include 'Find', 'View All', 'First', 'Last', and '+', '-'.

Diagnosis Table page

If your organization tracks workplace accommodations for employees with disabilities, then you will also use the same diagnosis codes that you enter here when you work with the Accommodation Data component, which you will find in the various Workforce Monitoring menus.

Note. (GBR) If your organization is implementing the Disability and Discrimination Act of 1995 feature of PeopleSoft Human Resources, you will use the Diagnosis Table to enter medical diagnoses for disabilities as well, and you will find this page in the Meet Regulatory Rqmts UK menu. You can use the page in either menu; it is the same.

(USA) If your organization is implementing the Americans with Disabilities Act (ADA) feature of PeopleSoft Human Resources, you will use the Diagnosis Table to enter medical diagnoses for disabilities as well, and you will find this page in the Meet Regulatory Rqmts menu. You can use the page in either menu; it is the same.

Diagnosis Code Select a value. You can define a different group of diagnosis codes for each setID.

Defining Dangerous Occurrences and Hazardous Conditions

Hazard control involves identifying workplace hazards and acting to eliminate or minimize any workplace hazard or exposure that risks the health and safety of personnel.

Use the tables in this section to set up types of dangerous occurrences and hazardous conditions. Once you establish codes for them, track hazardous materials and conditions by job code and location to identify employees who are at risk.

In this section, we discuss:

- Defining dangerous occurrences.
- Defining hazardous conditions and materials.
- Tracking hazards by location and job code.

- Tracking hazards by location.

Pages Used to Define Dangerous Occurrences and Hazards

Page Name	Object Name	Navigation	Usage
Dangerous Occurrences	HS_DANGER_OCC	• Set Up HRMS, Product Related, Workforce Monitoring, Health and Safety, Dangerous Occurrences Table • Workforce Monitoring, Health and Safety, Define Hazardous Environments, Dangerous Occurrences	Classify types of dangerous occurrences or specify those that are defined by the regulatory authority in your regulatory region. Use this code when you create a health and safety incident, using the Incident Details - Description page.
Haz Condition/Materials Table	HAZ_CON_MATRL_TBL	• Set Up HRMS, Product Related, Workforce Monitoring, Health and Safety, Haz Condition/Materials Table • Workforce Monitoring, Health and Safety, Define Hazardous Environments, Hazardous Conditions/Materials	Assign IDs to physical conditions and hazardous materials that might directly contribute to occupational accidents, injuries, or illnesses. The Hazard ID is used on the Corrective Actions and Preventive Actions pages.
Job Code Hazards Table	JOB_CODE_HAZRDS_TBL	• Set Up HRMS, Product Related, Workforce Monitoring, Health and Safety, Job Code Hazards Table • Workforce Monitoring, Health and Safety, Define Hazardous Environments, Job Code Hazards	Track exposures experienced by employees in a particular job code.
Location Hazards Table	LOCATN_HAZRDS_TBL	• Set Up HRMS, Product Related, Workforce Monitoring, Health and Safety, Location Hazards Table • Workforce Monitoring, Health and Safety, Define Hazardous Environments, Location Hazards	Identify exposures that have occurred at specific locations in your organization.

Defining Dangerous Occurrences

Access the Dangerous Occurrences page.

Dangerous Occurrences	
SetID: CAN	Dangerous Occurrence: 30
Details Find View All First 1 of 1 Last	
*Effective Date:	01/01/1980 *Status: Active
Description:	BLASTING ACCIDENT
Short Description:	BLASTING
Comments:	BLASTING ACCIDENT

Dangerous Occurrences page

Note. Remember that dangerous occurrences codes might vary by regulatory region. For example, in the United Kingdom dangerous occurrences are defined by the reporting of injuries, diseases, and dangerous occurrences regulations. In Canada, they are defined by the Worker's Compensation Board (WCB).

Defining Hazardous Conditions and Materials

Access the Haz Condition/Materials Table page.

Haz Condition/Materials Table	
SetID: GBR	Hazard ID: K400
Hazard Details Find View All First 1 of 1 Last	
*Effective Date:	01/01/1980 *Status: Active
*Description:	Improperly placed matrl/equip
Short Description:	Impr place
Hazard Type ☒ Condition ☐ Material	Materials Data Hazardous Class: Hazardous Division:

Hazardous Condition/Material Table page

Hazard ID

You can enter multiple hazard IDs for each setID and maintain different sets of hazard IDs for specific regulatory regions.

Hazard Type

Indicate whether the hazard type is Condition or Material. If you select Material, the Materials Data group box is available for you to enter the Hazardous Class and the Hazardous Division.

Note. American National Standards Institute (ANSI) standard codes in the United States for both Hazardous Class and Hazardous Division are stored in the Translate Table.

Tracking Hazards by Location and Job Code

Access the Job Code Hazards Table page.

Job Code Hazards Table									
SetID: SHARE		Table Set shared across Corp							
Job Code: 740010		Radiologist-Heart Research							
Hazard Details									
Reg Region	Hazard ID	Short Description	Date Reported	Date Removed	Hazard Type	Hazardous Class	Hazardous Division		
USA			11/04/2002					+	-

Job Code Hazards Table page

Job Code Because the job code is tied to the setID, you can maintain different hazard data for the same job code in different regulatory regions.

Reg Region (regulatory region) Enter the regulatory region for the hazard.

Hazard ID Add data rows to associate multiple Hazard IDs with each job code. When you enter a Hazard ID, the system populates the Short Desc, Hazard Type, Hazardous Class, and Hazardous Division fields.

Date Reported This is usually today's date, which you can change.

Date Removed Enter the date when job conditions were changed.

Note. Define hazardous conditions and materials on the Haz Condition/Materials Table page.

Tracking Hazards by Location

Access the Location Hazards Table page.

Location Hazards Table									
SetID: SHARE		Table Set shared across Corp							
Location Code: KUKY00		Kentucky Operations							
Hazard Details									
Reg Region	Hazard ID	Short Description	Date Reported	Date Removed	Hazard Type	Hazardous Class	Hazardous Division		
USA	K205	Noise	11/04/2002		Condition	Poisonous	Immediate and Seriously Toxic	+	-

Location Hazards Table page

Location Code The system displays the Location code that you entered.

Reg Region (regulatory region) Enter the regulatory region for the hazard. Because the location code is tied to the setID, you can maintain different hazard data for the same location code in different regulatory regions.

Hazard ID	You can add data rows to associate multiple Hazard IDs with each location. When you enter a hazard ID, the system populates the Hazard Type field.
Date Reported	This is usually today's date, which you can change.
Date Removed	Enter the date when location conditions were changed.

Note. Define hazardous conditions and materials in the Haz Condition/Materials Table page.

Defining Related Incident Details

Use the pages in this section to set up codes to identify factors that can relate to a work-related incident, such as animals and transportation type.

Company Property

Use the Company Property Table component available on the Monitor Health and Safety menu to track health and safety incidents that involve heavy equipment, machinery, and computer and electronic equipment. The two pages that comprise the Company Property Table are the same pages that appear in the Workforce Administration menus, where you use them to manage assets. Use the pages in either menu; they are the same.

Company Cars

Cars set up in Company Cars may be linked to incidents. If you add a company-owned vehicle, you can also access the registration and descriptive data that was previously entered for the vehicle on the Car Data page.

Note. When you enter a car into the Company Property Table, use the code or number that you used when entering the car into Car Data. This way, you will avoid maintaining different codes for the same car.

Pages Used to Define Related Incident Details

Page Name	Object Name	Navigation	Usage
Animal	HS_ANIMAL_TBL	- Set Up HRMS, Product Related, Workforce Monitoring, Health and Safety, Animal Table - Workforce Monitoring, Health and Safety, Define Accident/Injury Info, Animals Involved	Identify the types of animals involved in incidents. This data is used in the Incident Details - Travel page.
Transport	HS_TRANSPORT_TBL	- Set Up HRMS, Product Related, Workforce Monitoring, Health and Safety, Transport Table - Workforce Monitoring, Health and Safety, Define Accident/Injury Info, Transportation	Identify the modes of transportation used by your employees during incidents that occur during work-related travel. You will use Mode of Transport codes on the Incident Details - Travel page.

Identifying Animals

Access the Animal page.

Animal					
Animal Details					
			Customize Find View All	First	Last
	*Animal	*Description	Short Description		
1	K00001	Bear	Bear	+	-
2	K00002	Moose	Moose	+	-
3	K00003	Skunk	Skunk	+	-
4	K00004	Dog	Dog	+	-
5	K00005	Cat	Cat	+	-
6	K00006	Bird	Bird	+	-

Animal page

Animal Enter the animal type. To enter multiple animals, add data rows.

Identifying Modes of Transportation

Access the Transport page.

Transport					
Details					
			Customize Find View All	First	Last
	*Mode Of Transport	Description	Short Description		
1	K00001	Airplane	Airplane	+	-
2	K00002	Automobile-Company Car	Auto-Cmpny	+	-
3	K00003	Automobile-Personal	Auto-Prsnl	+	-
4	K00004	Automobile-Rental	Auto-Rentl	+	-
5	K00005	Bicycle	Bicycle	+	-
6	K00006	Big Rig	Big Rig	+	-
7	K00007	Bus	Bus	+	-
8	K00008	Ferry	Ferry	+	-
9	K00009	Motorcycle/Scooter	Motorcycle	+	-

Transport page

Mode Of Transport Enter a code.

For example, indicate the basic modes of transport by vehicle type, such as plane, train, car, bus, or taxi or identify the transportation company or services involved in the incident.

(IND) Setting Up Disablement Types

To record disability information for employees, you must define disablement types.

Page Used to Set Up Disablement Types

Page Name	Object Name	Navigation	Usage
IND Disablement Types	HS_DISABL_TYPE_IND	Set Up HRMS, Product Related, Workforce Monitoring, Health and Safety, Disablement Type IND	Define disablement types.

Entering Disablement Types

Access the IND Disablement Type page.

The screenshot displays the 'Disabling Type' page. At the top, there's a tab labeled 'Disabling Type'. Below it, the 'Injury Type' is set to 'Total' and the 'Disabling Code' is 'K09'. A 'Disabling Details' section contains several fields: 'Effective Date' is '01/01/2000' with a calendar icon; '*Status' is 'Active' with a dropdown and '+' '-' buttons; 'Description' is 'Double amputation'; 'Short Description' is 'Double amp'; 'Pct Loss of Earnings' is '100'; and 'Long Description' is 'Double amputation through leg or thigh amputation through leg or thigh on one side and loss of other foot' with a text area and scrollbars. Navigation links 'Find | View All' and '1 of 1' are visible.

Disabling Type page

- Injury Type** Select if the disabling type is *Partial* or *Total*.
- Disabling Code** Select a valid code.
- Pct Loss of Earnings** Enter the percentage of loss of earnings due to the disabling.

Defining Medical Services Information

In this section, we discuss entering medical specialist information.

Pages Used to Define Medical Services Information

Page Name	Object Name	Navigation	Usage
Medical Facility	HS_MEDICAL_FAC	- Set Up HRMS, Product Related, Workforce Monitoring, Health and Safety, Medical Facilities Table - Workforce Monitoring, Health and Safety, Define Medical Services, Medical Facilities	Enter hospitals and clinics and their addresses.
Physician Table - Name	HS_PHYSICIAN_DATA1	- Set Up HRMS, Product Related, Workforce Monitoring, Health and Safety, Physician Table - Workforce Monitoring, Health and Safety, Define Medical Services, Physicians	Enter doctors and other medical specialists to the Physician Table.
Physician Table - Address	HS_PHYSICIAN_DATA2	- Set Up HRMS, Product Related, Workforce Monitoring, Health and Safety, Physician Table - Workforce Monitoring, Health and Safety, Define Medical Services, Physicians	Enter addresses for doctors and other medical specialists.

Entering Medical Specialist Information

Access the Physician Table - Name page.

The screenshot displays the 'Physician Table - Name' page. At the top, there are two tabs: 'Name' (selected) and 'Address'. Below the tabs, the 'Physician ID' is set to '00000000013'. Under the 'Name' section, 'Format Using' is set to 'CAN' with a magnifying glass icon and the text 'Canada'. A yellow button labeled 'Refresh the Name Field' is to the right. Below this is a 'Person Name' section with several input fields: 'Prefix' (a dropdown menu showing 'Dr'), 'First' (text input 'Philip'), 'Middle' (empty text input), 'Last' (text input 'MCCleary'), 'Suffix' (empty text input with a magnifying glass icon), and a 'Name' field at the bottom showing the combined result 'MCCleary,Philip'.

Physician Table — Name page

Physician ID

The non-employee ID assigned to the physician appears at the top of the page as the Physician ID.

If you choose to have the system automatically assign non-employee IDs, it assigns to the physician the number that immediately follows the one displayed in the Last Non-Employee ID Assigned field in the Installation Table. The number first appears as 000000000000. The actual number appears after you save the information here. The system uses the same number sequence to assign non-employee IDs on both the Administer Training and Monitor Health and Safety pages.

Warning! To avoid maintaining two different sets of non-employee IDs, we recommend that you either always assign numbers manually or always let the system do it. Be consistent.

Format Using

Select the country whose name format you want to use for this person. When you exit this field, the system displays the appropriate fields for the country that you entered.

Prefix

Select a value from the available options. Valid values are stored in the Name Royal Prefix Table.

Title

(NLD) Enter a title, such as *Mr.*, *Mrs.*, *Duke*, or *Duchess*, from the list of valid titles. The system stores titles in the Title Table.

Preferred First Name

(NLD) If the employee prefers to use a different name from the official First Name, enter it here. The system uses the preferred name when you generate form letters or mailing labels for this employee.

Second Last Name

(ESP) For Spain, enter the second surname (mother's surname).

Suffix

Select a value from the available options. Valid values are stored in the Name Royal Suffix Table.

Note. If you are reporting employee information under the German Duevo Directive, these fields are required and must be completed according to the Duevo Rules: *Royal Suffix*, *Royal Prefix*, and *Title*.

See Also

[Chapter 5, "Tracking Personal Data for People Involved in Incidents," page 33](#)

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, "Installing PeopleSoft HRMS," Setting Up Implementation Defaults

Defining Work Restrictions and Modified Work Duties

When employees return to work after an injury or illness, they may not be able to immediately return to their full job duties. Use the codes you set up in these tables to track rehabilitation plans that are established for individuals.

Pages Used to Define Work Restrictions and Duties

Page Name	Object Name	Navigation	Usage
Work Restrictions Table	WORK_RESTRICT_TBL	- Set Up HRMS, Product Related, Workforce Monitoring, Health and Safety, Work Restrictions Table - Workforce Monitoring, Health and Safety, Define Work Restrictions, Codes and Effective Dates	Identify physical limitations or restrictions placed on individuals as a result of injuries or illnesses.
Modified Work Table	MODIFIED_WORK_TBL	- Set Up HRMS, Product Related, Workforce Monitoring, Health and Safety, Modified Work - Workforce Monitoring, Health and Safety, Define Work Restrictions, Modified Work	Identify changes and modifications to processes or methods of doing a job.

CHAPTER 4

Defining Additional Information for Global Incident Reporting

This chapter provides an overview of additional tables for global incident reporting and tells you how to:

- Set up Australian Claims Threshold tables.
- Set up Canadian Workers' Compensation Board reporting.
- Set up German Employers' Liability Insurance Association reporting.
- Set up Health and Safety Executive reporting in the United Kingdom.

(AUS) Managing Claims Threshold Details

Use the Claim Threshold Tables to establish claims threshold information by State, Union or Claim. Use this information when processing reimbursable expenses related to health and safety incidents and worker injuries resulting in treatment and lost work time.

Pages Used to Establish Claims Thresholds

Page Name	Object Name	Navigation	Usage
Claim Info Aus (Claim Threshold - State AUS)	CLAIM_INFO_AUS	- Set Up HRMS, Product Related, Workforce Monitoring, Health and Safety, Claim Threshold - State AUS - Workforce Monitoring, Health and Safety, Define Medical Services, Claim Threshold - State AUS	To establish claims threshold information by State.
Claim Info Aus (Claim Threshold – Union AUS)	CLAIM_INFO_AUS	- Set Up HRMS, Product Related, Workforce Monitoring, Health and Safety, Claim Threshold – Union AUS - Workforce Monitoring, Health and Safety, Define Medical Services, Claim Threshold - Union AUS	To establish claims threshold information by Union.
Claim Info Aus (Claim Threshold – Claim AUS)	CLAIM_INFO_AUS	- Set Up HRMS, Product Related, Workforce Monitoring, Health and Safety, Claim Threshold - Claims AUS - Workforce Monitoring, Health and Safety, Define Medical Services, Claim Threshold - Claims AUS	To establish claims threshold information by Claim. You must have a claim number to access this page.

Establishing Claims

Access the Claim Info Aus page.

Claim Info Aus

Country: AUS Australia

State: QLD Queensland

Expense Threshold:

Pre Injury Threshold: ☐ Use Schedule Fee

*SetID: SHARE

Table Set shared across Corp

Vendor ID:

Makeup Details

Customize | Find | View All |

First 1 of 1 Last

	Threshold Days	Claimable Percent	Makeup Pay %		
1					

Claim Info AUS page

- Expense Threshold** Enter an amount and the number of Pre Injury Threshold days that must pass before you can present a percentage of the worker's wages to an Insurance Provider for payment.
- Vendor ID** Indicate the insurer responsible for processing the company's reimbursable expense claims.
- Use the Schedule Fee** Indicate if you will use the schedule provided by the insurer.
- Threshold Days** Enter the number of days.
- Claimable Percent** Enter a value. This field represents the Insurer's liability.
- Make Up Percent** This field represents your organization's liability for the worker's wages.

Example

Based on 10 Pre Injury Threshold Days before your organization can pass on claims expenses to the Insurer, your company will pay 100 percent of the worker's claim for lost wages for the first ten days that the worker is absent. After the tenth day, the company can pass on 95 percent of the worker's wage claims to the Insurer. To establish these Make Up Details, you would enter the following on the Claims Threshold page:

Threshold Days	Claimable Percent	Make Up Percent
0	0	100
10	95	5

To establish claimable expense threshold information by Union or individual claims as opposed to by State, select either Union or Claims component from the menu items list. When accessing through the Claims page the system prompts you for a Claim Number. Before you can use this page, you must first establish individual claims based on worker safety incidents using the Claims Management component. Select a Claim Number from the list of valid values. Only claims with an Approved Status appear in the list of available options.

See Also

Chapter 7, “Processing Rehabilitation, Claims, and Examination Data,” Managing Claims, page 107

(CAN) Setting Up Canadian Workers’ Compensation Board (WCB) Reporting

Most of the Canadian features needed to set up data for tracking and reporting incidents, injuries, and illnesses to the WCB is included within the core global pages.

To complete the process of setting up WCB reporting, you need to:

1. Identify the standard industry classes and subclasses for business locations.

The WCB assigns numbers to identify the industry class and subclass of businesses and uses these classifications to analyze accident statistics by industry and to identify trends in the workplace. The WCB helps employers to identify the types of businesses in which the employer is currently registered.

2. Set up the standard occupational classifications used by the WCB.

Your organization’s occupation codes (job titles, for example) may not match the standard occupational classifications used by the WCB.

3. Define the types of casual factors associated with a health and safety incident.

A health and safety incident generally has identifiable causal factors that help to explain why the events occurred. Setting up standard contributing factor codes helps you to identify these causal factors consistently and aids in the tabulation and analysis of accident statistics.

4. Identify the types of actions taken to prevent future occurrences of incidents and accidents.

Note. Approved codes for the Workers Compensation Board can vary by regulatory region. Be sure to use the codes that are specific to your industry and approved by your provincial WCB office.

Pages Used to Set Up WCB Reporting

Page Name	Object Name	Navigation	Usage
Class/Subclass	HS_CLASS_CAN	- Set Up HRMS, Product Related, Workforce Monitoring, Health and Safety, Class/Subclass Table — CAN - Workforce Monitoring, Health and Safety, Define Accident/Injury Info, Class/Subclass CAN	Identify the standard industry classes and subclasses for your Canadian business locations, based upon the classifications designated by the WCB.
Occupation	HS_OCCUPATION_CAN	- Set Up HRMS, Product Related, Workforce Monitoring, Health and Safety, Occupation Table — CAN - Workforce Monitoring, Health and Safety, Define Accident/Injury Info, Occupations CAN	Set up the standard occupational classifications used by the WCB.
Contributing Factors	HS_CONTFAC_CAN	- Set Up HRMS, Product Related, Workforce Monitoring, Health and Safety, Contributing Factors — CAN - Workforce Monitoring, Health and Safety, Define Accident/Injury Info, Contributing Factors CAN	Define the types of casual factors associated with a health and safety incident.
Preventative Actions	HS_PREVENT_ACT_CAN	- Set Up HRMS, Product Related, Workforce Monitoring, Health and Safety, Prevent. Actions Table — CAN - Workforce Monitoring, Health and Safety, Define Accident/Injury Info, Preventative Actions CAN	Identify the types of actions taken to prevent future occurrences of incidents and accidents.

Identifying Classes and Subclasses for Business Locations

Access the Class/Subclass page.

Class/Subclass

The system displays the Class/Subclass code that you entered. Use this field on the Incident Details - Incident page and the Injury Details - Work Related page.

Setting Up Standard Occupational Classifications

Access the Occupation page.

Occupation

Occupation Code: A012002

Details

Find | View All

First 1 of 1 Last

*Effective Date:

01/01/1980

*Status:

Active

*Description:

FIRE MARSHALL

Short Description:

FIRE MARSH

Occupation page

Occupation Code

The system displays the *Occupation Code* that you entered. Use this code on the Employment Details page.

Defining Contributing Factor Types

Access the Contributing Factors page.

Contributing Factors

Contrib. Factor: 00002

Details

Find | View All

First 1 of 1 Last

*Effective Date:

01/01/1980

*Status:

Active

*Description:

INFLUENCE OF ALCOHOL OR DRUGS SUSPECTED

Short Description:

ALCOHOL

Contributing Factors page

Contrib. Factor
(contributing factor)

The system displays the Contrib. Factor code that you entered. Use this code on the Incident Details - Description page.

Identifying Preventative Action Types

Access the Preventative Actions page.

Preventative Action

The system displays the Preventative Action code that you entered. Use this code on the Consequent Actions – Preventative page.

(DEU) Setting Up for Employers' Liability Insurance Association Reporting

In this section, we explain how to establish the codes that are defined by your employer's liability insurance association for use in tracking and reporting health and safety incidents.

Note. Be sure to use the codes that are specific to your industry and approved by your employer's liability insurance association.

Pages Used to Set Up Employers' Liability Insurance Association Reporting

Page Name	Object Name	Navigation	Usage
Case Officer	HS_LOC_CASEOFF_GER	- Set Up HRMS, Product Related, Workforce Monitoring, Health and Safety, Case Officer Table DEU - Workforce Monitoring, Health and Safety, Define Accident/Injury Info, Case Officer DEU	Identify the officials for various areas of industrial health and safety within your organization. This information is used to identify incident case officers on the Employee Details page, the Injury Details - Reporting page and the DEU Job Data page.
SI Unit	SI_UNIT_GER	Set Up HRMS, Product Related, Workforce Administration, Workforce Data DEU, Social Insurance Unit	Set up your organization's Social Insurance Unit ID (Betriebsnummer). Use this number when reporting information to any public office.
Corrective Action	HS_CORRECT_ACT_GER	- Set Up HRMS, Product Related, Workforce Monitoring, Health and Safety, Correct. Actions Table DEU - Workforce Monitoring, Health and Safety, Define Accident/Injury Info, Corrective Actions DEU	Define corrective actions that you have implemented and associate the corrective action with a corrective action category.
Disease Class	HS_DIS_CLASS_GER	- Set Up HRMS, Product Related, Workforce Monitoring, Health and Safety, Disease Class Table DEU - Workforce Monitoring, Health and Safety, Define Accident/Injury Info, Disease Class DEU	Define disease classes and associate them with a disease type.

Page Name	Object Name	Navigation	Usage
Preventative Actions	HS_PREVENT_ACT_GER	- Set Up HRMS, Product Related, Workforce Monitoring, Health and Safety, Prevent. Actions Table — DEU - Workforce Monitoring, Health and Safety, Define Accident/Injury Info, Preventative Actions DEU	Define the actions that you have implemented to prevent workplace incidents or accidents.
Unsafe Item	HS_UNSAFE_ITEM_GER	- Set Up HRMS, Product Related, Workforce Monitoring, Health and Safety, Unsafe Item Table DEU - Workforce Monitoring, Health and Safety, Define Accident/Injury Info, Unsafe Items DEU	Define unsafe items and associate them with an unsafe item class.
Work Area Class	HS_WA_CLS_TBL_GER	- Set Up HRMS, Product Related, Workforce Monitoring, Health and Safety, Work Area Class Table DEU - Workforce Monitoring, Health and Safety, Define Accident/Injury Info, Work Area Class DEU	Set up work area classes as defined by the employer's liability insurance association.
Work Area Category	HS_WA_CTG_TBL_GER	- Set Up HRMS, Product Related, Workforce Monitoring, Health and Safety, Work Area Category Table DEU - Workforce Monitoring, Health and Safety, Define Accident/Injury Info, Work Area Category DEU	Set up work area categories as defined by the employer's liability insurance association.
Work Area	HS_WA_TBL_GER	- Set Up HRMS, Product Related, Workforce Monitoring, Health and Safety, Work Area Table DEU - Workforce Monitoring, Health and Safety, Define Accident/Injury Info, Work Area DEU	Set up work areas as defined by the employer's liability insurance association.

Page Name	Object Name	Navigation	Usage
Coop Society Data	HS_COOP_SOC_GER	- Set Up HRMS, Product Related, Workforce Monitoring, Health and Safety, Details DEU, Coop Society Data - Workforce Monitoring, Health and Safety, Details DEU, Coop Society Data	Associate an insurer's industrial hazard code with an employee.

Identifying Health and Safety Officials

Access the Case Officers Table page.

Officer Type

Select a type from the list of available options to classify the employee as a particular type of company case officer, such as a *Health and Safety Specialist* or a *Company Physician*.

Add data rows and use the inside scroll bar to assign multiple case officers to a location.

Setting Up a Social Insurance Unit ID

Access the SI Unit page.

The screenshot displays the 'SI Unit' page. At the top, there's a tab labeled 'SI Unit'. Below it, the 'Social Insurance Unit' is identified as 'KD0914'. A section titled 'Social Insurance Unit Information' contains several fields: '*Effective Date' set to '01/01/1980', '*Status' set to 'Active', '*Description' as 'SI Unit for KD1 Frankfurt', 'Short Description' as 'SI Frankft', and 'BTNR' as '91400005'. Navigation controls like 'Find', 'View All', 'First', '1 of 1', and 'Last' are visible at the top right of the information section.

SI Unit page

BTNR (Betriebsnummer) Enter the employer Social Insurance Number for this unit.

Defining Corrective Actions

Access the Corrective Action page.

Corrective Actions

The system displays the Corrective Actions code that you entered. This field is used on the Consequent Actions - Corrective page and the DEU Illness Tracking - Corrective Actions page.

Action Category

Select an option from the list of available options.

Defining Disease Types

Access the Disease Class page.

Disease Class	The system displays the Disease Class code that you entered. The Disease Class field is used on the Occupational Illness Details page and the DEU Illness Profile pages.
Disease Type	Associate the Disease Class with an appropriate Disease Type by selecting from the list of available options.

Defining Preventative Actions

Access the Preventative Actions page.

Preventative Action	The system displays the Preventative Action code that you entered. These codes are used on the Preventative Action Details and the DEU Causes/Preventative Actions pages.
----------------------------	---

Defining Unsafe Items

Access the Unsafe Item page.

Unsafe Item Class	Associate the Unsafe Item with an Unsafe Item Class by selecting from the list of available options.
Unsafe Item	The system displays the Unsafe Item code that you entered. This code is used on the Injury Details - Details page.

Setting Up Work Area Classes

Access the Work Area Class page.

Work Area Class	The system displays the Work Area Class code that you entered. Use the Work Area Class code to set up work area categories and work areas.
------------------------	--

Setting Up Work Area Categories

Access the Work Area Category page.

Work Area Class	To associate this Work Area Category with a Work Area Class, select the appropriate value.
Work Area Category	The system displays the Work Area Category code that you entered.

Setting Up Work Areas

Access the Work Area page.

**Work Area Category,
Work Area Class**

To associate this Work Area with a Work Area Category and a Work Area Class, select the appropriate values, which come from the Work Area Category and Work Area Class tables, respectively.

Work Area

The system displays the Work Area code that you entered. This code is used on the Injury Notification Details - Germany page.

Associating Hazard Codes With an Employee

Access the Coop Society Data page.

Hazard

Select a hazard code. The valid values provided on this page are those hazards that were previously entered for this employee's setID and department on the Department Table - Profile page. When you enter a hazard code on this page and press TAB to exit the field, a Description of the hazard appears in display mode immediately below.

Note. Remember that hazards are first established in the GER Accident Insurance table. Hazards are then associated with a setID and department on the Department Table - Profile page.

The Accident Insurance code and Description for this employee's setID and department appear in display mode to the right of the Hazard field. This information comes from the Department Table - Profile page.

(GBR) Setting Up Reporting to the Health and Safety Executive (HSE) in the United Kingdom

This section describes how to establish the codes that you need to track and report health and safety incidents to the HSE under RIDDOR.

Page Used to Set Up Reporting to the HSE in the United Kingdom

Page Name	Object Name	Navigation	Usage
External Scheme	HS_EXT_SCHEME_UK	- Set Up HRMS, Product Related, Workforce Monitoring, Health and Safety, External Scheme Table GBR - Workforce Monitoring, Health and Safety, Define Accident/Injury Info, External Scheme GBR	Maintain an External Scheme. RIDDOR incident reports must indicate whether the individual involved is part of an External Scheme, which is a vocational training, education, or job placement program usually involving a contract between an employee, an employer, and the government.

Adding and Updating an External Scheme

Access the External Scheme page.

External Scheme

External Scheme: EWX

Details Find | View All First 1 of 1 Last

*Effective Date: 11/04/2002 *Status: Active

*Description: Educational Work Experience

Short Description: EduWkExper

Scheme Type

☐ Training Scheme ☒ Work Experience

External Scheme page

External Scheme

The system displays the External Scheme code that you entered. Use this field on the Employment Details page.

Scheme Type

Select the appropriate option to indicate whether the scheme type is a Training Scheme or Work Experience.

CHAPTER 5

Tracking Personal Data for People Involved in Incidents

This chapter tells you how to:

- Enter non-employee data.
- Enter employee data.
- Maintain and view employee health card information.
- Enter family details.

Note. We strongly recommend that you enter employee information, non-employee information (if it applies), and employment information (for injured parties) into the system first, even before the incident information. This must be done for every person involved in an incident.

Entering Non-Employee Data

You can enter basic information about non-employees who are involved in health and safety incidents. The system stores the non-employee data that you enter on these pages separately from employee personal data.

Pages Used to Enter Non-Employee Data

Page Name	Object Name	Navigation	Usage
Non-Employee - Name	HS_NON_EMPL1	Workforce Monitoring, Health and Safety, Verify Persnnl Invlvd/Witnessd, Non-Employee	Maintain name information for non-employees involved in incidents.
Non-Employee - Address	HS_NON_EMPL1B	Workforce Monitoring, Health and Safety, Verify Persnnl Invlvd/Witnessd, Non-Employee	Maintain address information for non-employees involved in incidents.
Non-Employee - Personal Details	HS_NON_EMPL2	Workforce Monitoring, Health and Safety, Verify Persnnl Invlvd/Witnessd, Non-Employee	Maintain additional details for the individual.
Non-Employee - Extra Details	HS_NE_PERS_DATA	Workforce Monitoring, Health and Safety, Verify Persnnl Invlvd/Witnessd, Non-Employee	Maintain extra address information for the individual. This information may be required if the individual does not live at a normally recognized address.

Adding Name Information

Access the Non-Employee - Name page.

Non-Employee - Name page

Non-EmplID (non-employee ID) The system displays the non-employee ID that you entered.

The system automatically assigns the non-employee ID as the number immediately following the one displayed in the Last Non-Employee ID Assigned field in the Installation Table. The number first appears as 00000000000. The actual number assigned to the person appears after you save the information that you enter. Or, you can enter the number manually.

Warning! To avoid maintaining two different sets of non-employee IDs, we recommend that you either always assign numbers manually or always let the system do it.

Entering Personal Details

Access the Non-Employee - Personal Details page.

Public, John Q Non-EmpID: 00000001001

Birthdate: 05/27/1957

Date of Death:

Business Title: Business Manager

Employer:

Business Unit: GBIBU Global Business Institute BU

Department:

Supervisor ID:

Gender

☒ Male ☐ Female ☐ Unknown

Non-Employee - Personal Details page

- | | |
|----------------------|--|
| Birthdate | For reporting purposes, enter the person's birth date. |
| Date of Death | If a fatality is involved, enter the date of death. |
| Business Unit | If the person is a temporary or contract worker in your organization, enter a business unit. |
| Supervisor ID | If the person is a temporary or contract worker in your organization, enter a supervisor ID (employee ID). |

Entering Extra Address Information

Access the Non-Employee - Extra Details page.

Public, John Q Non-EmpID: 00000001001

Extra Address Information

Extra Address Information: Lives 2 miles from headquarters

▼ Canada

Street Number:

Street Name:

Unit Number:

P.O.Box:

Rural Route: [Get Default Address](#)

Non-Employee - Extra Details page

Extra Address Information Enter extra information about the individual's address in this free-form field.

(CAN) Canada

Use the Canada group box to enter additional address details for the individual. This information is needed for electronic reporting to the British Columbia Workers Compensation Board (WCB). The WCB requires that address street numbers be separated from street names. The automatic parsing of address information into a separate street number and name depends on first having this information in the system.

Street Number/Street Name Enter values. If street number and street name information already exists in the system for this non-employee, then click the Get Default Address button, and that information is automatically populated on this page.

Unit Number Enter additional address details.

Note. Remember that non-employee address information is entered on the Non-Employee Details page, and physician address information is entered on the Physician Table page.

Warning! For British Columbia WCB Electronic Data Interchange (EDI) reporting, the entry of information on this additional address page is necessary in order for the appropriate EDI records to be created. The absence of this information will cause the file to fail WCB's mainframe computer editing checks.

Entering Employee Data

Most of the data that you need for employees was entered into the system during the hiring process. Use the pages here to add additional data.

Pages Used to Enter Employee Data

Page Name	Object Name	Navigation	Usage
Employee Details	HS_PERS_DATA	Workforce Monitoring, Health and Safety, Verify Persnnl Involvd/Witnessd, Employee, Employee Details	Enter extra address information for employees who are involved in health and safety incidents. This information may be required if the individual does not live at a normally recognized address.
Employment	HS_EMPLOYMENT	Workforce Monitoring, Health and Safety, Verify Persnnl Involvd/Witnessd, Employment	Enter additional employment details for employees in your Canadian and United Kingdom operations who are involved in health and safety incidents.

Entering Employee Details

Access the Employee Details page.

Employee Details

Bergsten,Darlene

Employee

EmplID: K0G003

Extra Address Information

Lives 5 miles from headquarters

Canada

Street Number:

Street Name:

Unit Number:

P.O.Box:

Rural Route:

Get Default Address

Germany

Social Insurance Provider:

☐ Case Officer

Employee Details page

Extra Address Information Enter extra information about the individual's address in this free-form field.

(CAN) Canada

Use the Canada group box to enter additional address details for Canadian employees involved in a health and safety incident. Also use this group box to enter address information that is needed for electronic reporting to the British Columbia WCB. The WCB requires that address street numbers be separated from street names. The automatic parsing of address information into a separate street number and name depends on first having this information in the system.

(DEU) Germany

The information in this group box is needed for reporting to the employer's liability insurance association.

Social Insurance Provider Select the name of the employee's social insurance provider. Valid values come from the Social Insurance Table.

Case Officer Select the check box to indicate whether the employee is a company case officer.

Entering Employment Details

Access the Employment page.

Employment

Moore,Catherine J
 Employee
 EmplID: KC0005
 Empl Rcd#: 0

Business Title:

▼  **Canada**

Employment

Industry Start Date: 

Occupation Code: 

Job Available Months:
☒ **Employment Secure**

Relationship

☐ **Partner**
☐ **Principal**
☐ **Relative**

Worker Relationship: 

Category

☒ **Full Time**
☒ **Permanent**
☐ **Seasonal**

☐ **Volunteer**
☐ **Casual**
 Seasonal End Dt:

☐ **Subcontractor**
☐ **Student**

Employment Details: 

External Scheme:



Employment page

(CAN) Canada

The WCB always requires certain additional employment information for all injured employees. By definition, incident outcomes that are dangerous occurrences have no injured persons, so it is not necessary to enter employment information for persons involved in dangerous occurrences.

Employment

Industry Start Date	Enter a value.
Occupation Code	Enter a value.
Job Available Months	If the employee is returning to a job with a time limit, then use this field to indicate how many months the job will be available.

Employment Secure Select this check box to indicate that the employee has a job to which to return.

Relationship

Partner Select if the employee is a partner of another employee.

Principal Select if the employee is a principal of another employee.

Relative Select if the employee is a relative of another employee.

Worker Relationship If any of the Relationship boxes are selected, then fully explain those relationships in this free-form field. This information is required for reporting to the WCB.

Category

Full Time, Permanent, Seasonal, Volunteer, Casual, Subcontractor, Student Indicate the employee's employment category by selecting from the check boxes in the Category group box.

Employment Details This field is used with the Subcontractor category only. Describe the role of the subcontractor.

Seasonal End Dt (seasonal end date) If this is a seasonal employee, indicate the end date of their employment.

Note. For the purposes of electronic reporting to the British Columbia WCB, the mandatory employment profile that must be provided for injured employees includes the employee's industry start date, occupation code, and the appropriate category information.

(GBR) United Kingdom

Enter information regarding any external scheme in which your United Kingdom employee participates.

External Scheme Select a scheme code from the available options. The values come from the UK External Scheme Table page.

Maintaining Employee Health Card Information

Using the Employee Health Card component enables you to complete employee annual health and safety profiles. Refer to the data contained on these pages when you create reports tracking regulatory compliance, reactions to occupational exposures, or exam results, or when you create preventive health-care programs.

Common Elements Used in This Section

Start Date, End Date Enter date ranges for the code.

Comments Enter any applicable comments you'd like associated with the code.

Pages Used to Maintain Employee Health Cards

Page Name	Object Name	Navigation	Usage
Employee Health Card - Health Card 1	GVT_HEALTH_CARD_1	Workforce Monitoring, Health and Safety, Record Medical Exam Results, Health Card	Record the employee's physician contact information.
Employee Health Card - Health Card 2	GVT_HEALTH_CARD_2	Workforce Monitoring, Health and Safety, Record Medical Exam Results, Health Card	Record drug allergies, specific test names, and dates.
Health Card Review 1	GVT_HEALTH_RVW_1	Workforce Monitoring, Health and Safety, Record Medical Exam Results, Review Health Card Info, Health Card Review 1	View employee personal data.
Health Card Review 2	GVT_HEALTH_RVW_2	Workforce Monitoring, Health and Safety, Record Medical Exam Results, Review Health Card Info	View employee position information.
Health Card Review 3	GVT_HEALTH_CARD_1	Workforce Monitoring, Health and Safety, Record Medical Exam Results, Review Health Card Info	Review physician information for the employee.
Health Card Review 4	GVT_HEALTH_CARD_2	Workforce Monitoring, Health and Safety, Record Medical Exam Results, Review Health Card Info	Review any drug allergies, specific test names, and dates.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Installing PeopleSoft HRMS,” Administering Country Codes

Recording Employee Health Details

Access the Health Card - Health Card 2 page.

Health Card 1

Health Card 2

Bakker,Kees den

Employee

EmpID: KN0003

Drug Sensitivities

Find | View All First 1 of 1 Last

Drug Name:

+

-

Previous Tests Administered

Find | View All First 1 of 1 Last

*Test Date:

*Test Name:

+

-

Allergy Details

Find | View All First 1 of 1 Last

*Regulatory Region:

USA

United States

+

-

Customize | Find | View All

First 1 of 1 Last

	*Allergy Code	Description	*Start Date for Gen Standing PO	End Date	Comments		
1						+	-

Employee Health Card - Health Card 2 page (1 of 2)

Immunization Details Find | View All First 1 of 1 Last

*Regulatory Region: USA United States

	*Immunization Code	Description	*Start Date for Gen Standing PO	End Date	Comments
1					

Medication Details Find | View All First 1 of 1 Last

*Regulatory Region: USA United States

	*Medication Code	Description	*Start Date for Gen Standing PO	End Date	Comments
1					

Disease Details Find | View All First 1 of 1 Last

*Regulatory Region: USA United States

	*Disease Code	Description	Start Date for Gen Standing PO	End Date	Comments
1					

Employee Health Card - Health Card 2 page (2 of 2)

Drug Sensitivities

Drug Name Enter the drug to which the employee is sensitive.

Previous Tests Administered

Test Date Enter the test date.

Test Name Enter the test name.

Allergy Details

Allergy Code Select the appropriate Allergy Code.

Immunization Details

Immunization Code Select the appropriate Immunization Code.

Medication Details

Medication Code Select the appropriate Medication Code.

Disease Details

Disease Code Select the appropriate Disease Code.

Entering Family Details

After you set up the detail data for employees and non-employees, use the Family Details page to enter information about their family members.

Page Used to Set Up Family Information

Page Name	Object Name	Navigation	Usage
Family Details	HS_FAMILY	Workforce Monitoring, Health and Safety, Verify Persnln Involvd/Witnessd, Family	Enter additional family information for your employees or for non-employees who are involved in a health and safety incident.

Entering Family Information

Access the Family Details page.

Family Details

EmplID: KC0005 Moore,Catherine J

Next Of Kin:

Family Details						Customize	Find	View All		First	1 of 1	Last
	*Name	*Date of Birth	In School	Training								
1	Moore,Jeremy	02/02/1985	☒	☐								

Children Aged Under 18: 1

Children 18 - 25 In Education: 0

Family Details page

Next of Kin	Enter the name of the individual's next of kin using the standard PeopleSoft naming format (Last,First).
Date of Birth	Enter the birthdates of any children.
In School	Select this check box to indicate that the child is a student.
Training	Select this check box to indicate that the child is receiving training.

Note. In School and Training information is sometimes needed for reporting purposes.

Children Aged Under 18

Based upon the birthdate values entered and check boxes selected, the system automatically calculates and displays the number of children under 18 years of age.

Children 18 - 25 In Education

Based upon the birthdate values entered and check boxes selected, the system automatically calculates and displays the number of children aged 18-25 who are either studying in school or receiving training.

CHAPTER 6

Creating and Tracking Incidents

This chapter provides an overview of health and safety incidents and tells you how to:

- Enter new health and safety incidents.
- Enter injury details.
- Enter incident data for vehicles and equipment.
- Track consequent actions of incidents.
- Track incident, injury and illness data by individual.
- Define mixed committees for Mexico.

Understanding Health and Safety Incidents

This section describes:

- Entering new incidents.
- Assigning incident numbers.
- Incident numbering and regulatory authorities.

Entering New Incidents

Use the Incident Details component to track your organization's response to health and safety incidents. Track employees and non-employees and associate multiple individuals with a single incident.

If you do not yet know the details of an injury or illness, you can enter this data on the injury and illness pages later. Enter the information here before viewing the injury and illness summary by individual.

Assigning Incident Numbers

When you enter a new incident you assign an ID number to the incident. This number locates the incident record when you review it or add information later. The system automatically assigns the incident number or you enter the number yourself.

If the system assigns the number, it first appears as 00000000. The actual number assigned to the incident appears after you save the information that you enter on the Incident Data pages. The system stores the Last Incident # Used (last incident number used) in the Installation Table.

Incident Numbering and Regulatory Authorities

The incident numbers assigned by PeopleSoft Human Resources are simple consecutive numbers. They may not correspond to any incident numbering required by authorities in your particular regulatory region. Ensure that you clearly understand and follow any incident numbering system prescribed by your regulatory authorities. If the governing authorities in your regulatory region require a particular incident numbering scheme, then manually enter the numbers and carefully document your methods.

Warning! To avoid maintaining two different sets of incident numbers, we recommend that you either always assign numbers manually or always let the system do it.

Entering Health and Safety Incident Details

This section describes how to record information for health and safety incidents including:

- Adding and updating incidents.
- Recording employee-generated incident details.
- Describing incident details.
- Recording location information.
- Recording travel-related information.
- Identifying people connected to an incident.
- Maintaining notification requirements.

Pages Used to Enter New Health and Safety Incidents

Page Name	Object Name	Navigation	Usage
Incident Details - Incident	HS_INCIDENT	Workforce Monitoring, Health and Safety, Obtain Incident Information, Incident Details	Add a new incident or update an existing incident.
Incident Details - Incident: Details	HS_INCIDENT_SEC	Click the Details link on the Incident page.	Note. You can only access the Details link if this is a vehicle or equipment-related incident. Enter vehicle and equipment accident details.
Incident Details - Notification	HS_INC_NOTIFY	Workforce Monitoring, Health and Safety, Obtain Incident Information, Incident Details, Notification	Record incident details generated by employees.
Incident Details - Description	HS_INC_DESCRIPTION	Workforce Monitoring, Health and Safety, Obtain Incident Information, Incident Details, Description	Describe the health and safety incident and record related data.

Page Name	Object Name	Navigation	Usage
Incident Details - Location	HS_INC_LOCATION	Workforce Monitoring, Health and Safety, Obtain Incident Information, Incident Details Location	Identify the location where the incident occurred.
Incident Location Address	HS_INC_LOCADDR_SEC	Click the Edit Address link on the Location page.	Enter the location and address information for those incidents that occur off your organization's premises.
Edit Address	EO_ADDR_USA_SEC	- Click the Edit Address link on the Location page. - Click the Edit Address link on the Incident Location page.	Edit existing address information associated with the incident.
Incident Details - Travel	HS_INC_TRAVEL	Workforce Monitoring, Health and Safety, Obtain Incident Information, Incident Details, Travel	Record travel-related incident details.
Route Details	HS_INC_ROUTE_SEC	Workforce Monitoring, Health and Safety, Obtain Incident Information, Incident Details, Travel, Route Details	Provide additional travel route details for health and safety incidents.
Break Details	HS_INC_BREAK_SEC	Click the Break Details link on the Travel page.	Provide details about breaks in travel that are related to a health and safety incident.
Animals Involved in the Incident	HS_INC_ANIMAL_SEC	Click the Animal Details link on the Travel page.	Enter information about animals involved in a health and safety incident.
Incident Details - People	HS_INC_PEOPLE	Workforce Monitoring, Health and Safety, Obtain Incident Information, Incident Details, People	Identify witnesses, investigators, and other people connected to the incident. These are people were not injured or ill in the incident.
Incident Details - People: Contact Address	HS_INC_PPLADDR_SEC	Click the Edit Address link on the People page.	Enter address information for the witnesses, investigators, and other contacts in the Incident Details - People page. Note. (CAN) Users in British Columbia who report incidents to the BC WCB electronically must provide address information for all persons connected to the incident.
Incident Details - Reporting	HS_INC_REPORT	Workforce Monitoring, Health and Safety, Obtain Incident Information, Incident Details, Incident Reporting	Maintain documentation showing that you have notified the proper authorities of the incident.

Adding and Updating Incidents

Access the Incident Details - Incident page.

Incident	Notification	Description	Location	Travel	People	Reporting
Incident Number: 19240003						
*Incident Type:		Vehicle/Equipment Accident			Details	
*Incident Date:		05/18/2002				
Incident Time:						
*Regulatory Region:		IND			India	
☐ Is this a recurrence ☒ Resulted in Injury or Illness ☐ Investigated						

Incident Details — Incident page (1 of 4)

Canada

Health And Safety Contact

Contact ID:

Incident

Outcome:

☐ Date and Time Exact

Exposure

Start Date:

Start Time:

End Date:

End Time:

Disability

☐ Disability Program Available

Contact ID:

Comments:

Other Information

☐ RTW Program Available
 ☒ In WCB Jurisdiction

Class/Subclass:

Business Type:

Incident Details — Incident page (2 of 4)

▼  **France**

Incident Subtype

☐ Work ☐ Journey ☐ Occupational Illness

Reported By

☐ Employer ☐ Supervisor ☐ Victim

Where:

Sign Off By: 

Police Report

☐ Police Report

Author:

Incident Status

☐ Definite ☐ Known

Internal Investig Conclusions

Incident Details — Incident page (3 of 4)

▼  **Mexico**

☐ Detected by Mixed Committee

▼  **India**

Incident Subtype

☒ Work ☐ Journey ☐ Occupational Disease/Illness ☐ Other

Incident Details — Incident page (4 of 4)

Incident Number

The system displays the incident number that you entered.

If you are reporting to the British Columbia Workers' Compensation Board (BC WCB), then enter an incident number.

Incident Type

The Incident Type field appears by default to *Incident*, which you can change. Select a more specific type in the Translate Table. The value that you select controls the availability of other fields in the component.

For BC WCB reports: If you are filing incident reports electronically with the BC WCB, then leave the default value of *Incident* if you report an Outcome of Reported Only, Health Care Only, Short Term Disability, or Fatality. If you report an incident Outcome of Dangerous Occurrences, select *Dangerous Occurrence*.

Details	If you select <i>Vehicle/Equipment Accident</i> , the Details link appears. Click this link for access to the Entering Vehicle/Equipment Accident Details page.
Incident Date	The Incident Date appears by default to today's date, but you can change it.
Incident Time	Enter the time that the incident occurred. If you are reporting to the BC WCB, then enter an incident time.
Regulatory Region	Enter the regulatory region for the incident. When you add an incident, the Regulatory Region value initially appears by default from the user's regulatory region that is specified in Operator Preferences. You can override the default value. Note. Regulatory Region is a required field. It controls the values returned by all of the Monitoring Health and Safety setup tables that use setID as their key field. Warning! If you update an existing incident and you want to change the regulatory region, and if the setID for the new regulatory region differs from the original setID, then all of the relevant linked values from the setup tables are deleted by the system. Before proceeding with the change, the system prompts you to receive confirmation of your actions. Once the original information is deleted, you must re-enter the data for the incident.
Is this a recurrence	Select if this incident has happened before.
Resulted in Injury or Illness	Select if the incident resulted in injury or illness and you want to track injury or illness data on the Injury or Illness pages. When you select this check box, enter an employee ID in the Reported to EmplID field on the Notification page before saving the incident in the system. For BC WCB reports: Select this check box if you are reporting an Outcome of Reported Only, Health Care Only, Short Term Disability, or Fatality. If you are reporting an Outcome of Dangerous Occurrences, ensure that this check box is clear.
Investigated	Select this check box if this incident has been investigated.
Note. (DEU) German laws and insurers require that employers track and report detailed occupational illness data. The legal procedures for handling and reporting these illnesses differ from those that regulate occupational accidents, so all illnesses involving your German operations are tracked in Tracking Illnesses for German Employees.	

(CAN) Canada

The following information is specific to users who want to file incident reports electronically with the BC WCB. Note that the Contact ID, Class/Subclass, and Business Type fields are required for all incident outcomes.

Warning! To activate all the warnings we provide, you must set the Regulatory Region for the incident to *CANBC*. Even the creation of the extract file will not work without this because it is designed to focus on British Columbia incidents only.

Contact ID	Select a value.
Outcome	The Outcome field is unavailable for entry. The value is derived from the most severe Injury Outcome that you entered on the Injury Details page. For incidents with a CANBC regulatory region, the Outcome field is activated based upon a relationship between the incident outcome here and the injury outcome. If the Resulted in Injury or Illness check box is selected, then the system verifies that an injury is entered before you save the incident. Once you save the incident, the system associates an incident outcome with each injury outcome. For example, if only one person is injured, then the system populates the Outcome field with the same value as the injury outcome. If more than one person is injured, the most severe injury outcome defines the incident outcome. The translate values for Outcome are: <i>Reported Only:</i> Injuries may have occurred where no medical attention was sought nor was time lost. First aid may or may not have been rendered. <i>Healthcare Only:</i> The injured person visited a health care practitioner, but no time-loss beyond the day of injury occurred. First aid may or may not have been provided. In some WCB jurisdictions, this is also known as medical aid. <i>Short Term Disability:</i> The injured worker is off work beyond the day of the injury. First aid may or may not have been rendered. In some WCB jurisdictions, this is also known as wage loss. <i>Fatal:</i> A fatal injury for which the injured party may or may not have received first aid. <i>Dangerous Occurrence:</i> No injuries or injury outcomes are involved.
Date and Time Exact	Select to indicate that the date and time on the primary page are exact.
Exposure	If you select the <i>Exposure</i> Incident Type on the primary page, then enter the exposure start date and time and end date and time, if known.
Disability Program Available	Select if there is a disability program available at your organization.
Contact ID	You must select the Disability Program Available check box to use this field.
Descr (description)	You must select the Disability Program Available check box to use this field.
RTW Program Available (return to work available)	Select to indicate if there is a return to work program available at your organization.
In WCB Jurisdiction	Select to indicate if the business operation involved is in the WCB jurisdiction.

Class/Subclass Enter the industry class or subclass code.

You define the standard industry classes and subclasses for your Canadian business locations on the CAN Class/Subclass Table page.

(FRA) France

Incident Subtype Select an option to indicate whether the incident is Work, Journey, or Occupational Illness.

Employer, Supervisor, Victim Select an option to indicate whether the incident was reported by the Employer, Supervisor, or Victim.

Where Indicate where the incident was reported.

Sign Off By Enter the employee ID of the person who approved and signed the internal company written report.

Police Report Select if a police report was prepared.

Author Identify the author of the police report.

Incident Status Indicate if the incident status is Definite or Known.

Internal Investig Conclusions (Internal Investigation Conclusions) Describe the conclusions of the internal investigation.

(MEX) Mexico

Detected by Mixed Committee Select if the incident was detected by the Health and Safety mixed committee.

Mixed Committee Select the name of the mixed committee. This field only appears if you select the Detected by Mixed Committee check box.

(IND) India

Incident Subtype Select if the incident occurred at *Work*, during a *Journey*, as an *Occupational Diseases/Illness*, or due to *Other* reasons.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Understanding Regulatory Regions in PeopleSoft HRMS”

Recording Employee-Generated Incident Details

Access the Incident Details - Notification page.

Incident	Notification	Description	Location	Travel	People	Reporting
Incident Number: 19240003 Date: 05/18/2002 Vehicle/Equipment Accident						
Incident Notification						
Date Reported:		05/18/2002				
Time Reported:		12:00PM				
Reported To EmplID:		KP0005		M,Diya A		
Reported By EmplID:		GP0006		Singh,Harjeet N		
Reported By Non-EmplID:						
Incident Tracking						
Date Recorded:		05/20/2002				
Time Recorded:						

Incident Details — Notification page

Date Reported, Time Reported Enter the date and time reported to a company official or employee.

Reported To EmplID Enter the employee ID of the organization official or employee who received the report, or select from the list of prompt values which come from Personal Data.

Reported By EmplID or Reported By Non-EmplID Enter an ID for the person who reported the incident—either an employee or a non-employee.

Note. (CAN) If you are a user in British Columbia and report incidents to the BC WCB electronically, the Date Reported, Time Reported, Reported To EmplID, and Reported By EmplID fields are required.

Incident Tracking Use this group box for your own recording purposes. For example, track when the incident report or notification was first documented by an organization official in writing. Using this example, you enter a Date Recorded and Time Recorded to track this information internally.

However, the Date Recorded may be used to track another date for internal purposes. For example, track the date that pre-existing conditions began or the date when the employee began missing work. Alternatively, you can track the date an internal report, note, or memorandum is written to document the incident. For users in the United States subject to Occupational Safety and Health Administration (OSHA) regulations, the Date Recorded could be the date the incident is first entered into your PeopleSoft system.

Note. If you use the fields in the Incident Tracking group box, be sure to document your decision, train all of your users accordingly, and use the fields consistently.

Describing Incident Details

Access the Incident Details - Description page.

Incident Number: 19240003 Date: 05/18/2002 Vehicle/Equipment Accident

Dangerous Occurrence

Code:

Description

▼ **Canada**

Customize Find View All		First	1 of 1	Last
Contrib. Factor	Other Description			

▼ **India**

Alcohol/Substance Taken ☒

Incident Details — Description page

Code

For most incident types, this field is unavailable. When the Incident Type selected on the Incident page is *Dangerous Occurrence*, the Code field is available. Select a Code from the list of prompt values, which come from the Dangerous Occurrences Table.

(CAN) Canada

Contrib. Factor (contributing factor)

Indicate contributing factors that might have caused the incident to occur. This information is used for reporting to the Canadian WCB.

If you are a user in British Columbia and you report to the BC WCB electronically, the contributing factor is required on a final report for all incident outcomes except Reported Only.

Select a contributing factor from the list of prompt values that come from the CAN Contributing Factors Table. When you press TAB to move out of the Contrib. Factor field, the Other Description is unavailable for input.

Other Description

This field is generally unavailable for data entry. When the contributing factor code is 00996 - *Other*, the Other Description field is available for data entry, and you must enter a narrative description of the *Other* contributing factor.

(IND) India

Alcohol/Substance Taken Select if alcohol or substance was taken during the time of the incident.

Recording Where Incidents Occur

Access the Incident Details - Location page.

The screenshot displays the 'Incident Details - Location' page. At the top, there are tabs for 'Incident', 'Notification', 'Description', 'Location' (which is active), 'Travel', and 'People'. Below the tabs, the incident details are shown: 'Incident Number: 19240003', 'Date: 05/18/2002', and 'Vehicle/Equipment Accident'. The main section is titled 'Incident Location Data'. It contains a checkbox labeled 'Occurred on Employer Premises' which is checked. Below this, there are two rows of input fields. The first row is for 'Location SetID' with a value of 'KPIND' and a search icon, followed by 'India SetID'. The second row is for 'Location' with a value of 'KPBLR01' and a search icon, followed by a text field containing 'M G Road, Branch'. Below the 'Location' field, there is a blue link labeled 'View Address'. At the bottom, there is a large text area for 'Exact Location' with a vertical scrollbar on the right.

Incident Details — Location page (1 of 3)

▼ **Canada**

Street Number:

Street Name:

Unit Number:

P.O.Box:

Rural Route:

Location Size:

☐ Accident At Temporary Site

☐ Incident At Operating Locn

Description of Accident Scene

Incident Details — Location page (2 of 3)

▼ **France**

Location Class:

▼ **United Kingdom**

Local Authority: **Public Place** ☐

▼ **India**

Establishment ID: Estab 1 of KP1

Empl State Ins/Workmen Comp: Employee State Insurance

Incident Details — Location page (3 of 3)

Occurred on Employer Premises

Select if the incident occurred on employer premises.

Location SetID

If you select the Occurred on Employer Premises check box, then select a Location SetID from the list of prompt values that come from the Company Table. Use this field to set up the Location list of prompt values. For instance, if the location where the employee normally works is in Canada, but the location where the incident occurred is in France, use

the Location SetID field to specify a French setID, and you will be able to select the French Location where the incident occurred.

Location

Select from the list of prompt values that come from the Location Table for the Location SetID that you selected.

Exact Location

Record a detailed description of where the incident occurred, using up to 240 characters.

Edit Address

If the incident occurred on the employer's premises, click this link to view the location address data in display mode on another page. The address information is populated from the Location Table.

If the incident occurred off the employer's premises, then click this link to access the Address Data page in active mode and enter the address data for the off-site location where the incident occurred.

(CAN) Canada

Get Default Address

If Street Number and Street Name information already exists in the system for this employee, then click the *Get Default Address* button to populate the fields on this page.

Street Number, Street Name, Unit Number, P.O. Box, and Rural Route

Otherwise, enter additional address details directly into these fields. Some of this information is needed if the incident location is at a non-standard address, such as in a remote or rural location.

Location Size

Indicate the location size (in terms of numbers of people) by selecting from the list of translate values.

Incident At Temporary Site

Select to indicate whether the incident occurred at a temporary site.

Incident At Operating Lcn (incident at operating location)

Select to indicate whether the incident occurred at an operating location.

Note. (CAN) For users in British Columbia who report incidents electronically to the BC WCB, much of this page is required for all incident types. Separate the Street Number from the Street Name. The additional Unit Number, PO Box, and Rural Route information need only be completed if the location is a non-standard address. The Location Size field is required. You must select either the Incident at Temporary Site or the Incident at Operating Location check box if the Occurred on Employer's Premises check box is selected on the Incident Location page. The WCB mainframe computer checks for valid address and postal code combinations so ensure that these are correct to avoid having your electronic report rejected by the BC WCB.

(FRA) France

Location Class

Select the appropriate item from the list of available options to indicate additional information regarding the location and circumstances under which an incident occurred.

(GBR) United Kingdom

Provide additional location details for incidents that occur in the United Kingdom. This information is needed for reporting under Reporting of Injuries, Diseases and Dangerous Occurrences Regulations (RIDDOR).

Local Authority

The local authority should be entered if the incident did not occur at a specific postal code location. For example, if an accident occurred while an employee was traveling in a vehicle, the location of the accident may simply be described as “5 miles outside Reading on the A33 route.” Depending upon the circumstances of an accident, you might want to contact the HSE office in your area for clarification.

Public Place

Select if the incident location is a public place.

(IND) India

Establishment ID

Enter the ID of the establishment where the incident occurred.

Empl State Ins/Workmen Comp (Employee State Insurance/Workmen Compensation)

Type of registration under which the establishment is covered displays.

Recording Travel-Related Incidents

Access the Incident Details - Travel page.

Incident	Notification	Description	Location	Travel	People	Reporting
Incident Number: 19240003		Date: 05/18/2002		Vehicle/Equipment Accident		
Travel Details						
Start Date for Gen Standing PO:				Start Time:		
Arrival Date:				Arrival Time:		
Destination:				Route Details		
Mode Of Transport:						
☐ Break Taken In Journey				Break Details		
☐ Animals Involved				Animal Details		
Comment:						

Incident Details — Incidents page (1 of 2)

The screenshot shows a web form titled "Germany" with a German flag icon. It contains two main sections: "Drug/Alcohol Details" and "Accident Report".

Drug/Alcohol Details:

- Alcohol/Substance Taken:** A text input field.
- Endorser:** A text input field.

Accident Report:

- Accident Report Type:** A dropdown menu with "Police" selected. To the right are "+" and "-" buttons.
- Reference Number:** A text input field.
- Country:** A dropdown menu with "USA" selected. To the right is a magnifying glass icon and the text "United States".
- Address:** A large text area with a vertical scrollbar. To the right is a blue link labeled "Edit Address".

At the top right of the "Accident Report" section, there are links for "Find", "View All", and "1 of 1" with "First" and "Last" navigation buttons.

Incident Details — Travel page (2 of 2)

Start Date, Start Time, Arrival Date, and Arrival Time

Enter these fields, if known.

Destination

When you enter a Destination, the Route Details link is available. Click the link to access the Route Details page.

Mode Of Transport

Select the mode of travel from the list of available options. The values come from the Transport Table.

Break Taken In Journey

Select this if the travel was not continuous. The Break Details link is available. Click the link to access the Break Details page.

Animals Involved

Select if an animal was involved in the incident.

Animal Details

When you select the Animals Involved check box, the Animal Details link is available. Click the link to access the Animal Details page.

(DEU) Germany

Alcohol/Substance Taken

If applicable, indicate in this field how drugs or alcohol were involved in the incident.

Endorser	Record the identity of the person or authority who confirms the information in the Alcohol/Substance Taken field.
Accident Report Type	Select from the list of translate values for various German authorities to indicate the accident report type, if needed.
Reference Number	Enter the reference number this public office is using to store the report.

Entering Additional Travel Route Details

Access the Incident Details - Travel: Route Details page.

The screenshot shows a web form titled "Route Details". Inside the form, there is a section titled "Route Details" with the following fields and options:

- Actual Route:** A text input field with up and down arrow buttons on the right.
- ☐ **Direct Route Taken**: A checkbox.
- Direct Route:** A text input field with up and down arrow buttons on the right.
- ☐ **Usual Route Taken**: A checkbox.
- Usual Route:** A text input field with up and down arrow buttons on the right.
- Reason For Unusual Route:** A text input field with up and down arrow buttons on the right.
- Route Details:** A text input field with up and down arrow buttons on the right.
- Route Length (km):** A small text input field.

At the bottom of the form are two buttons: "OK" and "Cancel".

Route Details page

Actual Route	Enter a description of the actual route traveled.
Direct Route Taken	Select if the actual route was the most direct route available.
Direct Route	This field available for entry if you do not select the Direct Route Taken check box. Enter a description of the most direct route.
Usual Route Taken	Select if the actual route was the usual route.
Usual Route	This field is available if you did not select the Usual Route Taken check box. Enter a description of the usual route.
Route Length (km)	Enter the kilometers for the actual route taken.

Identifying People Connected to the Incident

Access the Incident Details - People page.

Incident	Notification	Description	Location	Travel	People	Reporting
Incident Number: 19240003 Date: 05/18/2002 Incident Type: Vehicle/Equipment Accident						
People Connected to this Incident Find View All First 1 of 1 Last						
EmplID: KP0005 M,Diya A + -						
Role: Eyewitness Witnesses: Confirmation:						
☐ Responsible For Incident ☐ Under The Influence Of Drugs						
☒ Trustworthy Person Drug Class:						
☐ Able To Answer Questions						
Edit Address						
Comment:						

Incident Details — People page (1 of 2)

Canada	Investigators ☐ Management Representative ☐ Labor Representative
Germany	Insurance Details:
France	Accident Insurance:

Incident Details — People page (2 of 2)

People Connected to This Incident

EmplID, Non-Employee ID Enter either an employee ID or a non-employee ID, and press TAB to move out of the field. The field in which you did not select an ID disappears.

Note. You must have entered the employee into the system using Personal Data, or the non-employee using Non-Employee Details.

Prepare a separate data row for each individual connected to the incident.

Role

Indicate the individual's role in the incident by using the list of translate values. The value that you select for this field affects the availability of fields on the remainder of the page.

Responsible For Incident, Trustworthy Person, Able To Answer Questions, and Under The Influence Of Drugs

Select the appropriate check boxes. If the individual is in the role of Investigator or Witness, then the Responsible For Incident check box is unavailable for data entry.

A witness is not involved in the incident but is merely an observer.
An eyewitness is involved in the incident.

Drug Class

If you select the Under the Influence of Drugs check box, select the appropriate drug class from the list of available options.

Witnesses Confirmation

This field is available when you select the Witness role. Use the list of translate values to identify whether or not the witness confirms the statement made by the individual involved in the incident.

Edit Address

Click this link to access the Incident Details - People: Contact Address page.

(CAN) Canada

For users in British Columbia who report incidents to the BC WCB electronically, an Investigator must be identified in the Role field when the report is a final report. This is true for all Incident Outcomes other than Reported Only. In addition, the investigator must be identified either as a Management Representative or as a Labor Representative. For Incident Outcomes of the type Reported Only, no investigator information is required. To provide address information for all persons connected to the incident, click the Edit Address link and access the Contact Address page.

Investigators

Select the appropriate check box to indicate whether the investigator is a Management Representative or a Labor Representative.

(DEU) Germany**Insurance Details**

Enter additional insurance information for people who are involved in German incidents.

(FRA) France**Accident Insurance**

Enter additional insurance information for people who are involved in French incidents.

Maintaining Notification Requirements

Access the Incident Details - Reporting page.

Notification	Description	Location	Travel	People	Reporting
Incident Number: 19240003 Date: 05/18/2002 Vehicle/Equipment Accident					
Reporting Find View All First 1 of 1 Last					
*Regulatory Region: IND Q India + -					
Report Date: 05/18/2002 B Report Time:					
*Reported to: KP0004					
Person Reporting: Q					
Location SetID: KPIND Q					
Reporting Location: Q					
Comment:					

Incident Details — Reporting page (1 of 2)

Canada	
Report Status ☒ Preliminary ☐ Final	Reporting Firm Number: Location:
India	
Reporting Information Reported By: Police Report	

Incident Details — Reporting page (2 of 2)

Reporting

Add data rows if multiple initial incident reports are made such as to more than one authority or agency.

Regulatory Region

Select the person making the initial incident report.

When you add or update an incident and need to change the regulatory region from the default value, select from the list of prompt values. Regulatory regions are set up in the Regulatory Region Table, and the Regions In Transaction Table. The system uses the *HANDS* regulatory transaction type for health and safety transactions. This transaction type includes regulatory regions for the main countries supported in the system and for the Canadian provinces.

Warning! If you are updating an existing incident and you want to change the regulatory region, and if the setID for the new regulatory region differs from the original setID, then all of the relevant linked values from the setup tables are deleted by the system. Before proceeding with the change, the system prompts you first to confirm your actions. Once the original information is deleted, you must re-enter the data on the incident.

Person Reporting	Select the person reporting (employee ID). The values come from Personal Data.
Location SetID	Select the Location SetID for the location of the person reporting. Prompt values come from the TableSetID Table.
Reporting Location	Select the reporting location that is officially making the report.

(CAN) Canada

For users in British Columbia who report incidents to the BC WCB electronically, the Regulatory Region, Report Date, and Report Time fields on the Incident Reporting page are mandatory for all incident outcomes. Also, indicate that the Regulatory Region is *CANBC*. This is critical because warning messages for the BC WCB EDI file functionality become activated only when this is set.

Report Status	Select an option to indicate whether the report is Preliminary or Final.
Reporting	Enter the Canadian WCB Firm Number and Location code.

Note. (CAN) For users in British Columbia who report incidents to the BC WCB electronically, the Report Status, Firm Number, and Location fields are required. Remember, when the Report Status is Final, an Investigator must be identified on the Incident - People page.

(IND) India

Reported By	Select if the incident was reported by <i>Airlines, Police Report, Railways, State Transport Administration, or Others</i> .
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See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Understanding Regulatory Regions in PeopleSoft HRMS”

Entering Injury Details

Use the Injury Details component to record information about injuries sustained in incidents. Before you enter injury and illness information, first create an incident, assign an incident type, and select the Resulted In An Injury Or Illness check box on the Incident Details - Incident page.

Note. (CAN) For incidents where the Incident Outcome is Dangerous Occurrence, no injury information is entered into the system because by definition there are no injuries in these types of incidents. Proceed to the Consequent Actions pages to enter corrective and preventative actions for the incident.

Common Elements Used in Injury Details

Accident Type	If the injury resulted from an accident, select the type of accident from the Accident Type Table.
Body Part	Select a code from the list of values from the Body Parts Table.
Nature of Injury	Select a code to identify the injury in terms of its principal physical characteristics—what happened to the employee. The values come from the Nature of Injury Tables.
Primary Injury	Select if this injury detail is associated with the primary injury.
Side of Body	Indicate the side of the body for the body part, if appropriate, by selecting from the list of translate values.
Source of Injury	Select a code to identify the object, substance, exposure, or bodily motion that produced or inflicted the injury. Use the list of prompt values that come from the Source of Injury Table.
Unsafe Act Performed	If applicable, select a code to indicate if the accident was caused by an unsafe action.

Pages Used to Enter Injury Details

Page Name	Object Name	Navigation	Usage
Injury Details - Injury	HS_INJ_NOTIFY	Workforce Monitoring, Health and Safety, Obtain Incident Information, Injury Details, Injury	Enter information about employees and non-employees who have work-related injuries or illnesses.
Injury Details – Description	HS_INJ_DESCRIPTION	Workforce Monitoring, Health and Safety, Obtain Incident Information, Injury Details, Description	Enter detailed information about the injury or illness or both involved in the incident.
Injury Details – Statements	HS_INJ_STATEMENT	Workforce Monitoring, Health and Safety, Obtain Incident Information, Injury Details, Statements	Document the statements made by the injured or ill party, the employer, and witnesses.
Injury Details - Details	HS_INJ_DETAIL	Workforce Monitoring, Health and Safety, Obtain Incident Information, Injury Details, Details	Provide details of the injury or illness suffered by each person involved in the incident.
Injury Details - Details: Body Parts	HS_INJ_BP_SEC	Click the Body Parts link on the Details page.	Identify body parts affected by the injury or illness.
Injury Details - Details: Nature of Injury	HS_INJ_NOI_SEC	Click the Nature of Injury link on the Details page.	Define the nature of the injury or illness.

Page Name	Object Name	Navigation	Usage
Injury - Source of Injury	HS_INJ_SOI_SEC	Click the Source of Injury link on the Details page.	Identify the source of the injury.
Injury Details - Details: Accident Type	HS_INJ_ACC_SEC	Click the Accident Type link on the Details page.	Assign accident types to the injury or illness.
Injury Details - Details: Unsafe Act	HS_INJ_ACT_SEC	Click the Unsafe Act link on the Details page.	Indicate if an unsafe act contributed to the injury or illness.
Injury Details - 1st Aid	HS_INJ_AID	Workforce Monitoring, Health and Safety, Obtain Incident Information, Injury Details, 1st Aid	Enter first aid and medical treatment information for all injured or ill individuals involved in the incident.
Injury Details - 1st Aid: Ambulance Details	HS_INJ_AID_AMB_SEC	Click the Ambulance Details on the 1st Aid page.	Enter additional details about the time when the individual was transported to a hospital by an ambulance.
Prior Disability	HS_INJ_PDSCAN_SEC	On the 1st Aid page, select the Prior Disability check box in the Canada group box, and click the Disability link.	Enter details about any relevant prior disabilities of the injured or ill person.
Prior Health Condition	HS_INJ_PHCCAN_SEC	On the 1st Aid page, select the Prior Health Condition check box in the Canada group box. Click the Condition link.	Enter details about any relevant prior health conditions of the injured or ill person.
Injury Details - Diagnoses	HS_INJ_DIAGNOSIS	Workforce Monitoring, Health and Safety, Obtain Incident Information, Injury Details, Diagnoses	Record details about the physician, hospital or clinic, and the medical diagnoses involved with your injured and ill employees.
Injury Details - Diagnoses: Medical Facility Address	HS_INJ_MEDFAC_SEC	Click the Edit Address link on the Diagnoses page.	Edit the address of the medical facility.
Injury Details - Work-Related	HS_INJ_WORK	Workforce Monitoring, Health and Safety, Obtain Incident Information, Injury Details, Work-Related	Record if the incident occurred while the person was involved in a work-related activity.
Wage Inclusions	HS_INJ_WICAN_SEC	Click the Wage Inclusions link on the Work-Related page.	Enter additional information about wage inclusions for Canadian employees who have a work-related injury or illness.
Wage Additions	HS_INJ_WACAN_SEC	Click the Wage Additions link on the Work-Related page.	Enter additional information about wage additions for Canadian employees who have a work-related injury or illness.
Actions	HS_INJ_ACTCAN_SEC	Click the Actions link on the Work-Related page.	Enter additional information needed for reporting to the WCB, concerning the employee's actions at the time of the incident.

Page Name	Object Name	Navigation	Usage
Return To Work	HS_INJ_RTWCAN_SEC	Click the Return to Work link on the Work-Related page.	Enter additional return to work details for Canadian employees who are injured or ill in a work-related incident.
Long Term Earnings	HS_INJ_LTECAN_SEC	Click the Long Term Earnings link on the Work-Related page.	Enter additional information about long term earnings for Canadian employees who have work-related injuries or illnesses.
WCB Form 7 Details	HS_INJ_WCBCAN_SEC	Click the WCB Form 7 Details link on the Work-Related page.	Enter additional information about Canadian incidents needed for reporting to the WCB.
Injury Details - Reporting	HS_INJ_REPORT	Workforce Monitoring, Health and Safety, Obtain Incident Information, Injury Details, Reporting	Track if incidents are reportable under the terms an authority of a regulatory region.

Entering Work-Related Injuries

Access the Injury Details - Injury page.

Injury	Description	Statements	Details	1st Aid	Diagnoses	Work-Related	Reporting
Incident Number: 19240003 Date: 05/18/2002 Vehicle/Equipment Accident							
Person Involved Find View All First 1 of 1 Last							
EmplID: KP0003 Goenka,Rajkumar N Empl Rcd#: 0							
Date of Birth: 01/06/1965 Date of Death: Gender: Male							
Employee Data at Incident Date							
Business Unit: KP01 India SetID							
Department: KP0001 Human Resources							
Job Code: 910010 Trainee - Management							
Location: KPBLR01 M G Road, Branch Active							
Notification - This Person							
*Date Reported: 05/18/2002							
Time Reported: 12:00AM							

Injury Details — Injury page (1 of 3)

▼ Canada

Injury	Exposure
Date: 05/18/2002 Time: ☐ Date and Time Exact	Start Date: Start Time: End Date: End Time:

Designates Find | View All First 1 of 1 Last

Sequence: 1
Designate:
Date Reported: **Time Reported:**
Position Type:
Other Description:
1st Aid Cert. #: ☐ First Designate Reported To

Injury Details — Injury page (2 of 3)

▼ Germany

☐ Owner Partner
☐ Partner
☐ Incompetent
☐ Relation
Work Area:

▼ France

Timetable		
	From	To
Morning		
Afternoon		

▼ United Kingdom

☐ Member Of Public
☐ Self-Employed

Injury Details — Injury page (3 of 3)

EmplID

For each Person Involved in the incident, select either an EmplID or a Non-Employee ID. When you press TAB, the unselected field disappears, and the system displays the associated Name, Date of Birth, Gender and, if applicable, the Date of Death.

Note. If a fatality occurs, enter the Date of Death in Personal Data or Non-Employees Involved in Incidents, depending on whether the person involved is an employee or non-employee.

Empl Rcd # (employment record number)	If you're entering information on an employee who has more than one job, select the appropriate employment record number for the job the employee was performing when the incident occurred.
Employee Data At Incident Date	The employee information displayed here comes from Job Data that is valid as of the incident date.
Notification - This Person	Enter the date and time when this person's injury or illness was reported to an organization official.

(CAN) Canada

Injury	Enter the date and time of the injury and select the Date and Time Exact check box if the date and time are exact.
Exposure	Indicate the exposure Start Date, Start Time, End Date, and End Time, if known.
Sequence	This field designates are people to whom injuries and incidents are reported. They are distinguished from Incident People, who are usually people who are involved in the incident and are reporting it. The Sequence number is a sequential number, assigned automatically by the system, to differentiate between designates. When you save this record, the Sequence number is available in the First Aider Designate field on the 1st Aid page.
Designate	Select the employee ID of the designate.
Date Reported and Time Reported	Enter the date and the time that the injury was reported.
Position Type	Select an option. The type selected determines the availability of the remaining fields on the page. If you select the types <i>None</i> or <i>Worker's Supervisor</i> , then the Other Description and 1st Aid Cert. # fields are unavailable.
1st Aid Cert. # (first aid certificate number)	If you select <i>First Aid Attendant</i> as the Position Type, then enter the first aid certificate number for the designate.
Other Description	If you select <i>Other</i> as the Position Type, then enter a description of the designate's position.
First Designate Reported To	Select whether the person is the first designate to whom the injury was reported.

(DEU) Germany

Owner Partner, Partner, Incompetent, Relation	Indicate the relationship of the person notified to the person involved. If you select Relation, the associated field is available for selection.
Work Area	Select an option from the values that you set up on the Work Area Table.

(FRA) France

Timetable	Enter the time of the notification.
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(GBR) United Kingdom

Member Of Public and Self-Employed

If the individual involved in the incident is a non-employee, then indicate if the person involved in the incident was a Member Of Public or Self-Employed.

Entering Injury and Illness Descriptions

Access the Injury Details - Description page.

Injury	Description	Statements	Details	1st Aid	Diagnoses	Work-Related	Reporting
Incident Number: 19240003 Date: 05/18/2002 Vehicle/Equipment Accident							
Person Involved Find View All First 1 of 1 Last							
EmplID: KP0003 Goenka,Rajkumar N		Empl Rcd#: 0		+ -			
Date of Birth: 01/06/1965		Date of Death:		Gender: Male			
Primary Outcome				Treatment Required			
☒ Injury ☐ Illness ☐ Death				☐ Medical ☐ First Aid ☒ Hospitalized ☐ None			
Occupational Illness							
Illness:							
Injury/Illness Details							

Injury Details — Description page (1 of 2)

▼ Canada

Injury Outcome:

Business Type:

Description of Accident Scene

People Find | View All First 1 of 1 Last

EmpID:

Non-EmpID:

Role:

☐ Responsible For Incident

Comment:

▼ United Kingdom

Occ. Illness Diagnosis Date:

Injury Details — Description page (2 of 2)

Primary Outcome Indicate whether the incident resulted in *Injury*, *Illness*, or *Death*.

Treatment Required Indicate if the treatment was Medical, First Aid, Hospitalized, or None.

Note. (DEU) All illnesses that involve your German operations are tracked using the DEU Illness Tracking component.

Occupational Illness If you select Illness in the Primary Outcome group box, then *Illness* is available for data entry in this group box. Values come from the Occupational Illness Table.

Injury/Illness Details Enter details about the illness.

(CAN) Canada

For users in British Columbia who report incidents to the BC WCB electronically, note that injury information is not required for incident outcomes that are dangerous occurrences. On the Injury Description page, the only required item is the Injury Outcome, which is used to derive the Incident Outcome on the Incident Details - Canada page. The entries that you make in the Primary Outcome and Treatment Required group boxes should be consistent with the type of Incident Outcome that you enter into the system.

Injury Outcome Select an option from the list of translate values.

Business Type Use the values that are approved by your regional WCB office to describe the business type (required).

Description of Accident Scene Enter a description.

People

Enter the people involved with or who have knowledge of the injury or illness. People with knowledge of the incident are entered on the Incident People page.

EmplID, Non-Employee ID Enter either an EmplID or a Non-Employee ID.

Note. You must have entered the employee into the system using Personal Data, or the non-employee using Non-Employee Details.

Prepare a separate data row for each individual connected to the incident.

Role Select a role for each individual identified. Values are *Witness* or *Other Party*. The value that you select here affects the availability of fields on the remainder of the page.

Responsible For Incident If you selected *Other Party* in the Role field, you can select this check box.

Note. (CAN) For users in British Columbia who report incidents to the BC WCB electronically, the information on this page is not required for Incident Outcomes that are Dangerous Occurrences. The Injury Outcome and Business Type are required fields. Remember, the most severe Injury Outcome for all of the injured persons in this incident is used to derive the Incident Outcome on the Incident Details - Canada page.

(GBR) United Kingdom

Occ. Illness Diagnosis Date (occupational illness diagnosis date) When the Injury Outcome selected is *Illness*, then the Occ. Illness Diagnosis Date field is available for data entry.

Documenting Injury Statements

Access the Injury Details - Statements page.

Incident Number: 19240003 **Date:** 05/18/2002 Vehicle/Equipment Accident

Person Involved Find | View All First 1 of 1 Last

EmpID: KP0003 **Goenka, Rajkumar N** **Empl Rcd#:** 0 **+** **-**

Date of Birth: 01/06/1965 **Date of Death:** **Gender:** Male

Employer's Statement

Employer Objections

☐ **Employer Objects to Statement**

Injured Party's Statement

☐ **Witness Confirms Statement**

Injury Details — Statements page

- | | |
|----------------------------------|---|
| Employer's Statement | Enter the employer's statement. |
| Injured Party's Statement | Enter the injured party's statement. Select Witness Confirms Statement if a witness confirms the injured person's statement. |
| Employer Objections | To indicate that there are employer objections to the injured party's statement, select Employer Objects To Statement and enter the objections. |

Note. (CAN) For users in British Columbia who report incidents to the BC WCB electronically, the information on this page is not required for Incident Outcomes of the types Dangerous Occurrences or Reported Only. The Employer's Statement is required for Incident Outcomes of the types Health Care Only, Short Term Disability, and Fatality.

Entering Injury and Illness Details

Access the Injury Details - Details page.

Injury	Description	Statements	Details	1st Aid	Diagnoses	Work-Related	Reporting
Incident Number: 19240003 Date: 05/18/2002 Vehicle/Equipment Accident							
Person Involved Find View All First 1 of 1 Last							
EmplID: KP0003 Goenka,Rajkumar N		Empl Rcd#: 0		+ -			
Date of Birth: 01/06/1965		Date of Death:		Gender: Male			
Injury Description							
Body Parts Nature of Injury Source of Injury Accident Type Unsafe Act							
Primary Injury Details							
Body Part: Nature of Injury: Source of Injury: Chemicals & chemical products uns Accident Type: Unsafe Act Performed:							

Injury Details — Details page (1 of 2)

Canada			
Link Customize Find View All First 1 of 1 Last			
Nature of Injury	Description	Body Part Code	Description
			+ -
Germany			
Unsafe Item:			
France			
Protective Clothing Details Customize Find View All First 1 of 1 Last			
Protective Clothing			
+ -			
United Kingdom			
Height of Fall: metres			

Injury Details — Details page (2 of 2)

Injury Description

Click the links to gain access to the detail pages that describe the attributes of the injury.

Primary Injury Details

This group box displays the primary injury details that you specify on the detail pages.

Note. The information on the Body Parts, Nature of Injury, and Accident Type pages is required for an Incident Outcome of Reported Only. The information on the Body Parts, Nature of Injury, Source of Injury, and Accident Type pages is required for the Incident Outcomes Health Care Only, Short Term Disability, and Fatality.

(CAN) Canada

For users in British Columbia who report incidents to the BC WCB electronically, the injury information on this page is not required for Incident Outcomes that are Dangerous Occurrences.

Nature of Injury

Enter the code that you want to link to a body part. The reason for creating this link is that the BC WCB assumes that the nature of injury is directly associated with some body part.

Body Part Code

Enter the code for the body part that you want to link to the nature of the injury.

To activate the link, save the information that you enter on the Body Parts and Nature of Injury pages, and save the information here.

(DEU) Germany**Unsafe Item**

Select an Unsafe Item code, if applicable. Values come from the DEU Unsafe Item Table.

(FRA) France**Protective Clothing**

Identify the employee's protective clothing at the time of the incident. Insert a new data row for more entries.

(GBR) United Kingdom**Height of Fall**

If the individual was involved in a fall, enter the height of the fall in meters.

Entering Medical Treatment Information

Access the Injury Details - 1st Aid page.

Injury	Description	Statements	Details	1st Aid	Diagnoses	Work-Related	Reporting
Incident Number: 19240003 Date: 05/18/2002 Vehicle/Equipment Accident							
Person Involved Find View All First 1 of 1 Last							
EmplID: KP0003		Goenka,Rajkumar N		Empl Rcd#: 0		+ -	
Date of Birth: 01/06/1965		Date of Death:		Gender: Male			
Injury Details							
☐ Patient Taken To Hospital		Hrs. Mins.		☐ Resuscitation Required			
☐ Patient Fell Unconscious				☐ Ambulance Required			
☐ Fatal Injuries Sustained		Ambulance Details					
First Aid and Medical Treatment Find View All First 1 of 1 Last							
*Date: 05/18/2002		Group Box		+ -			
*Time: 12:00PM		☐ First Aid ☒ Medical ☐ None					
Employee: KP0005		Description:					

Injury Details - 1st Aid page (1 of 4)

Canada	
Worker First Aid Information	
First Aider Desig. Seq. #:	Q
How Worker Arrived First Aid:	
How Worker Left First Aid:	
☐ Attendant Observe Unconscious	
Ambulance Transportation Time	
Hours:	
Minutes:	
Prior Conditions	
☐ Prior Disability	Disability
☐ Prior Health Condition	Condition
Proximity	
Nearest Practitioner Distance:	
Nearest Hospital Distance:	
Nearest Hospital Name:	

Injury Details - 1st Aid page (2 of 4)

▼ France

Infirmiry Registration

☐ Registered at Infirmiry

Date:

Number:

Evacuation Find | View All First 1 of 1 Last

Medical Facility:

Where Taken:

Injury Details - 1st Aid page (3 of 4)

▼ United Kingdom

☐ Hospitalised for over 24 hours

▼ India

Proximity

Nearest Practitioner Distance:

Nearest Hospital Distance:

Nearest Hospital Name:

Injury Details - 1st Aid page (4 of 4)

Patient Fell Unconscious	If you select this check box, the Hrs. and Mins. fields are available. Enter the amount of time, in hours and minutes, that the individual remained unconscious.
Patient Taken To Hospital	Select if the individual was taken to a hospital.
Fatal Injuries Sustained	If you select this, be sure that the Primary Outcome on the Incident Description page is Death, and enter the Date of Death in Personal Data if the individual is an employee.
Ambulance Required	If you select this, the Ambulance Details link is available. Click the link to gain access to the Ambulance Details page.
Resuscitation Required	Select if the individual required resuscitation.
Date and Time	Enter the date and time when first aid or medical treatment was provided.
Employee	When you add a data row, both of these fields are available. Select either the Employee ID or Non-Employee ID of the person providing first aid or medical treatment.
First Aid, Medical, and None	Select the appropriate option to indicate the type treatment that was provided.

(CAN) Canada

First Aider Design Seq # (first aider designate sequence number)	Select a designate (first aider) who treated or assisted the injured or ill person. The available values and sequence numbers come from the Injury Details - Injury page.
How Worker Arrived First Aid	Select the mode of transportation used to bring the injured or ill worker to the designate.
How Worker Left First Aid	Select the mode of transportation used to take the injured or ill person away, if applicable.
Attendant Observe Unconscious	If you select the Patient Fell Unconscious check box on the primary page, then this check box is available for data entry. Indicate that the designate (first aider) observed the injured person to be unconscious at the time treatment was given.
Hours and Minutes	Enter the ambulance transportation time in hours or minutes or both. This is the amount of time that the ambulance took to transport the injured or ill person to the hospital.

Note. In the context of operations and incidents that occur within the CANBC regulatory region, *Ambulance* specifically means British Columbia Ambulance.

Prior Disability and Prior Health Condition	Select the appropriate check boxes to indicate whether the injured or ill person had a relevant prior disability or prior health condition. When you select a check box, the associated Disability or Condition link is available. Click these links to gain access to the Prior Disability and Prior Health Condition pages.
Nearest Practitioner Distance	Enter the distance to the nearest medical practitioner, if known.
Nearest Hospital Distance and Nearest Hospital Name	Name the nearest hospital and enter its distance from the accident site.

(FRA) France

Registered at Infirmary	Select if the injured or ill person was registered at an infirmary.
Date and Number	Enter the date of registration in the infirmary and the registration number.
Medical Facility	Select the medical facility to which the injured or ill person was taken. When you press TAB, the medical facility name appears in the Where Taken field. Values come from the Medical Facilities Table. If the injured or ill person was taken to a location that is not a medical facility in your system, then bypass the Medical Facility field, and describe where the individual was taken in the Where Taken field.

(GBR) United Kingdom

Hospitalized for over 24 hours	Indicate if the injured or ill person was hospitalized for over 24 hours.
---------------------------------------	---

(IND) India

Nearest Practitioner Distance Enter the distance from the establishment to the nearest medical practitioner at the time of the injury.

Nearest Hospital Distance Enter the distance from the establishment to the nearest hospital at the time of the injury.

Nearest Hospital Name Enter the name of the nearest hospital at the time of the injury.

Recording Diagnoses Details

Access the Injury Details - Diagnoses page.

Injury	Description	Statements	Details	1st Aid	Diagnoses	Work-Related	Reporting								
Incident Number: 19240002 Date: 05/10/2002 Injury															
Person Involved Find View All First ◀ 1 of 1 ▶ Last															
EmplID: KP0002		Patil,Naveen A		Empl Rcd#: 0		+ -									
Date of Birth: 01/05/1972		Date of Death:		Gender: Male											
Physician/Hospital Information Find View All First ◀ 1 of 1 ▶ Last															
*Type of Health Care:		Company Physician + -													
Physician ID:		00001924001 Pandey,Ram Kumar													
Medical Facility:		KU03 John Muir Medical Facility													
Phone:		Edit Address													
Medical Diagnoses Customize Find View All First ◀ 1 of 1 ▶ Last															
<table border="1"> <thead> <tr> <th>Diagnosis</th> <th></th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td>KP0003 </td> <td>Lower Back Pain (Lumbar)</td> <td></td> <td>+ -</td> </tr> </tbody> </table>								Diagnosis				KP0003	Lower Back Pain (Lumbar)		+ -
Diagnosis															
KP0003	Lower Back Pain (Lumbar)		+ -												

Injury Details - Diagnoses page (1 of 3)

▼ India

Person Involved

Disablement

Type of Disablement:

Partial/Total

Disability Code: Pct Loss of Earnings:

Occupational Illness

Illness:

Others

Additional Descr:

Injury Details - Diagnoses page (2 of 3)

Physician Recommendations

Job

Job Type:

Job Start Date: Job End Date:

Leave Details

Leave Type:

Leave From Date: Leave To Date:

Approval

Approval Date: ☒ Employee ID ☐ Physician ID

Injury Details - Diagnoses page (3 of 3)

Type of Health Care

Select the type of health care, such as *Emergency Care* or *Ongoing Health Care*, that the individual received at the hospital or clinic.

Physician ID

Select a Physician ID for the doctor or other medical specialist who treated the injured or ill person. The associated name appears.

Medical Facility

Select a medical facility where the injured or ill person was treated. The name of the facility appears.

Edit Address

Click this link to gain access to the Injury Details - Diagnoses: Medical Facility Address page. Edit the address of the medical facility, if needed.

Diagnosis

When you know the results of the physician's medical diagnosis, select a diagnosis code. Define these codes in the Diagnosis Table. If you do not know this information now, enter it at a later date.

Insert a new data row for each additional Diagnosis code.

(IND) India**Type of Disablement**

Select if the type of disablement is *Permanent Partial Disablement*, *Permanent Total Disablement*, due to an *Occupational Disease/Illness*, or due to *Other* reasons.

Disablement Code

If the type of disablement is permanent partial disablement or permanent total disablement, select the appropriate code. Disablement codes are defined on the IND Disablement Types page.

Pct Loss of Earnings
(percent loss of earnings)

The percentage of loss of earnings for the selected Disablement Code displays. This percentage is defined on the IND Disablement Types page.

Illness

If the type of disablement is an occupational disease or illness, select the type of illness.

Additional Descr (additional description)

If the type of disablement is due to some other reason, enter a description of the disablement type here.

Job Type

Select if the physician has recommended an *Alternate Job* or *Light Work*.

Job Start Date

Enter the start date of the alternate job or light work job.

Job End Date

Enter the end date of the alternate job or light work job.

Leave Type

Select if the physician has recommended *Accident Leave* or *Special Leave*.

Leave From Date

Enter the start date of the leave.

Leave To Date

Enter the end date of the leave.

Approval Date

Enter the date the physician recommendations were approved.

Employee ID

Select if an employee approved the physician recommendations and select the employee's ID.

Physician ID

Select if a physician approved the recommendations and select the physician's ID.

Recording Work-Related Incidents

Access the Injury Details - Work-Related page.

Injury	Description	Statements	Details	1st Aid	Diagnoses	Work-Related	Reporting
Incident Number: 19240002 Date: 05/10/2002 Injury							
Person Involved Find View All First 1 of 1 Last							
EmplID: KP0002 Patil,Naveen A		Empl Rcd#: 0		+ -			
Date of Birth: 01/05/1972		Date of Death:		Gender: Male			
☒ Work-Related ☐ Employee Return To Work		Days Away From Work:					
Last Date / Time:		Restricted Workdays:					
Return Date / Time:		*Illness Resulted In: N/A					
Canada							
☐ Payments during disability		Payments Descr:					
☐ Benefits continue							
☐ Variable Shift Rotation		Fixed Rotation Start Date:					
Last Day Scheduled Start / End Time				Last Day's Wages: 0.00			
☐ Lump Sum Holiday Pay Received		Holiday Pay Rate %:					
☐ Absent after day of injury		Start/End Dates:					
Class/Subclass:							
Customer Cost Center:							
Wage Inclusions		Actions		Long Term Earnings			
Wage Additions		Return To Work		WCB Form 7 Details			

Injury Details - Work-Related page (1 of 2)

Germany

Payments

☐ Payments Continue Until Date:

Work

☐ Work After Start

Work Stop: Stop Date:

France

Consequences

☐ None ☐ Change Job

☐ Reject Claim ☐ Stop Work

Physical Disability

Period:

Amount %:

Notify Date:

India

Work Related Information

Shift Details

Shift: Supervisor ID:

Start Time: End Time:

Injury Details - Work-Related page (2 of 2)

Employee Return To Work Select if the employee returned to work after the incident.

Work-Related Select if the incident was work-related.

Days Away From Work If the employee spent time away from work as a result of the incident, enter the number of days that the employee was away from work.

Note. Some government authorities have very precise definitions of Days Away From Work and Restricted Workdays. Ensure that you use the definitions that apply to your regulatory region.

Last Date/Time If the employee spent time away from work, enter the date and time of the employee's last day at work.

Note. (CAN) The Last Date/Time field on this page is required for reporting to the BC WCB.

Restricted Workdays	Enter the number of days that the employee was able to work within limitations established by a doctor.
Return Date/Time	If the employee spent time away from work, enter the date and time of the employee's first day back at work after the incident.
Illness Resulted In	Select from the available options to indicate if the injury or illness resulted in <i>Transfer</i> , <i>Termination</i> , or is <i>N/A</i> (not applicable).

(CAN) Canada

Payments during disability	Select if the employee is receiving payments and then describe the payments in the Payment Descr field.
Benefits continue	Select if the employee's benefits are continuing.
Variable Shift Rotation	Select if an employee is working a variable shift rotation.
Fixed Rotation Start Date	Enter when the employee will return to a fixed shift rotation.
Last Day Scheduled Start/End Time	Record information about lost work time.
Last Day's Wages	Enter the wages of the employee's last day.
Lump Sum Holiday Pay Received	Select if the employee received lump sum holiday pay.
Holiday Pay Rate %	If the employee received lump sum holiday pay, enter the pay rate percentage.
Absent after day of injury	Select if the employee missed work after the injury and then enter the Start/End Dates for the period of absence.
Class/Subclass	Select the correct class or subclass for the employee's business unit. Use the proper WCB classification for your business.
Customer Cost Center	Enter the employer's Customer Cost Center code that represents the cost center that the individual is in. The Customer Cost Center code is assigned by the WCB in conjunction with the employer and helps to track claim costs at a given organizational level.

Note. To enter additional information needed for reporting to the WCB, click any of the six links to open additional Canadian pages.

(CAN) Canada

The following table lists the required fields for British Columbia users.

Incident Outcome	Required Fields
Reported Only	Last Day's Wages
	Class/Subclass

Incident Outcome	Required Fields
Health Care Only	Last Day's Wages
	Last Date Time
	Class/Subclass
Short Term Disability or Fatality	Last Day Scheduled Start/End Time
	Last Day's Wages
	Last Date Time
	Class/Subclass

(DEU) Germany**Payments Continue**

If the employee has the right to collect compensation payments, select this check box and enter the Until Date when the payments will stop.

Work After Start

Select this check box if the employee has resumed working after an illness.

Work Stop

If the employee no longer works for your organization, select the appropriate Work Stop time. Values are *None*, *Immediately*, *Later*, and *No*.

Stop Date

Enter the date when the employee stopped working.

(FRA) France**Consequences**

Indicate the actions taken by the employer in response to the injury or illness.

Period

Select whether the period of disability for the injured or ill employee is a *Permanent Disability* or a *Temporary Disability*.

Amount %

Indicate the estimated degree of disability, which is determined by a doctor or medical specialist.

Notify Date

Enter the date the employer was notified regarding the employee's disability.

(IND) India**Shift**

Select *General Shift*, *Shift One*, *Shift Two*, or *Shift Three*.

For example, if your organization has a day shift and a night shift, you can use Shift One for the day shift and Shift Two for the night shift. If your organization has more than two shifts, you can use Shift Three, depending on the timing of the shift.

Supervisor ID Select the employee ID of the employee's shift supervisor.

Start Time and End Time Enter the employee's shift start and end time.

(CAN) Entering Long Term Earnings

Access the Injury Details - Work-Related: Long Term Earnings page.

Long Term Earnings

Find | View All First 1 of 1 Last

Sequence Number: 1 + -

Amount:

Period Start Date: 02/10/2002 Period End Date: 05/09/2002

Date Change Reason:

OK Cancel

Long Term Earnings page

The WCB is interested in two different long term earnings periods—the three months prior to the injury, and the twelve months prior to the injury.

Sequence Number In the records on this page, the dates appear by default to three months prior to the injury for sequence number 1 and twelve months prior to the injury for sequence number 2.

Amount Enter the amount of earnings for the periods in each sequence.

Period Start Date and Period End Date If the person has not been with your organization for either the entire three-month period or the entire 12-month period, enter the Period Start Date and the Period End Date.

Date Change Reason When you enter period start and end dates, you are required to provide a reason for the date changes.

Tracking Reporting Details

Access the Injury Details - Reporting page.

Injury	Description	Statements	Details	1st Aid	Diagnoses	Work-Related	Reporting
Incident Number: 19240002		Date: 05/10/2002		Injury			
Person Involved Find View All First ◀ 1 of 1 ▶ Last							
EmplID: KP0002		Patil,Naveen A		Empl Rcd#: 0		+ -	
Date of Birth: 01/05/1972		Date of Death:		Gender: Male			
☐ Further Inquiry ☒ Reportable Case							
▼ Germany							
Case Number:							
Case Officer ID:							
Date Filed:							
Reject Reason: ▼							
Employer Social Insurance Nbr:							

Injury Details — Reporting page (1 of 3)

▼ USA	
OSHA Case Nbr:	
Date Filed:	
Illness Type:	Occupational Skin Disease ▼
Log Comments:	
▼ Australia	
Case Number:	
Date Filed:	
▼ New Zealand	
Case Number:	
Date Filed:	

Injury Details — Reporting page (2 of 3)

▼ India

Reporting Details

Inspection Information

Inspector Name:

Inspector Title:

Inspection Date: Inspection Time:

Corrective or Preventive Actn:

Action: Date of Action:

Officer Responsible:

Reporting Information

Reported To EmpID:

Employer Designate ID: DeptID:

Insurance Information

Insurance Number: Insurance Date:

Injury Details — Reporting page (3 of 3)

Further Inquiry

Select if additional inquiry is required to determine if this is a reportable case.

Reportable Case

Select if the incident is reportable under the terms of one or more authorities in one or more regulatory regions. Even if there are no regulatory requirements at your location for tracking reportable cases, you can track whether the case is reportable based upon insurer requirements or the requirements of your own organization.

If you do not need to report this particular case based upon the requirements for your regulatory region, your insurer, or your organization, then clear the Reportable Case check box.

Warning! You must follow the reporting requirements of any particular regulatory regions where you have operations. Clearly document the reasons and methods for how you use the system for identifying Reportable Cases, and train all of your users to do it the same way.

Note. If your U.S. operations follow the requirements of the Occupational Safety and Health Administration (OSHA), select the Reportable Case check box for cases that are required for recording on the OSHA Form 200 Injury and Illness Recordkeeping Log.

(DEU) Germany

Case Number Enter the official report case number.

Note. If your government, insurer, or organization uses a standard system for numbering cases, you can set up PeopleSoft Human Resources so that it assigns the numbers automatically.

Case Officer ID The system displays the Case Officer ID from GER Job Data (for the person involved in the incident). Remember, case officers are set up for particular setIDs and locations in the DEU Case Officer Table. Individuals are designated as case officers on the Employee Details - Germany page. Case officers are assigned to individuals involved in incidents using the DEU Job Data page.

Date Filed Enter the date the report was filed with the insurer. This information is used in the GER Accident Report.

Reject Reason Select any reason given by the insurer for rejecting the claim, if applicable.

Employer Social Insurance Nbr Enter the employer's Social Insurance Number.

(USA) United States

OSHA Case Nbr (occupational safety and health case number) The case number that you enter here is used by the system in the OSHA 200 Occupational Injury and Illness report (OHS001).

Date Filed Enter the date that the reportable case was entered into the OSHA Form 200 Injury and Illness Recordkeeping Log.

Illness Type If the person has a work-related illness, select an appropriate type of illness. OSHA defines these illness types.

Log Comments You can enter comments exactly the length of the field as it appears on the page—this length matches the space allowed for comments on the OSHA Form 200 Injury and Illness Recordkeeping Log.

(AUS) Australia

Case Number Enter the case number.

Date Filed System displays the date the incident was filed with the government.

(NZL) New Zealand

Case Number Enter the case number.

Date Filed System displays the date the incident was filed with the government.

(IND) India

Inspector Name	Enter the name of the person doing the inspection.
Inspector Title	Enter the title of the inspector.
Inspection Date	Enter the date of the inspection.
Inspection Time	Enter the time of the inspection.
Corrective or Preventive Actn	Select if the inspector has directed Corrective Action or Preventive Action.
Action	Enter the specifics of the corrective or preventive action.
Date of Action	Enter the date by which the corrective or preventive action must be completed.
Officer Responsible	Enter the name of the officer responsible for the completion of the corrective or preventive action.
Reported to Empl ID	Select the ID of the employee to whom the injury was reported.
Employer Designate ID	Enter the ID of the person in your organization who received the information about the injured employee.
Dept ID	Select the department ID to which the Employer Designate belongs.
Insurance Number	Enter the employee's insurance number.
Insurance Date	Enter the effective date of the employee's insurance.

Entering Additional Incident Data for Vehicles and Equipment

If you manage vehicles or heavy equipment owned by your organization, then use the following pages.

Pages Used to Enter Data for Vehicles and Equipment

Page Name	Object Name	Navigation	Usage
Vehicle/Equipment	HS_INC_VEHICLE	Workforce Monitoring, Health and Safety, Obtain Incident Information, Vehicle/Equipment Involved	Enter the specifics of incidents involving vehicle or equipment accidents. You must have created the incident and assigned it an incident type of Vehicle/Equipment Accident.
Equipment Details	EQUIP_SUM_SEC	Click the Equipment link on the Vehicle/Equipment page.	View additional information about equipment.
Vehicle/Equipment Incident Details: Car Details	CAR_DATA_SUM_SEC	Click the Car Details link on the Vehicle/Equipment page.	View additional information about vehicles.

Entering Vehicle and Equipment Incident Details

Access the Vehicle/Equipment page.

Vehicle/Equipment

Incident Number: 19240002 Date: 05/10/2002 Injury

Vehicle/Equipment Data Find | View All First 1 of 1 Last

*Property Code: Type: + -

Equipment Details Car Details

Business Unit:

Dept Charged: *Currency: USD

Estimated Damage Amount		Actual Damage Amount	
Vehicle/Equipment:		Vehicle/Equipment:	
Property:		Property:	

▼ USA

☐ DMV Reported ☐ DOT Reported

Involved People Customize | Find | View All First 1 of 1 Last

	EmpID	Non-EmpID	*Role	
1			▼	+ -

Vehicles/Equipment Involved page

Property Code

Select a Property Code from the valid values that you classified as Vehicles or Heavy Equipment in the Company Property Table. When you press TAB to move out of this field, the system displays related information on the page.

If the property code Type is a Vehicle, the Car Details link is available. If the property code Type is Heavy Equipment, the Equipment Details link is available. Click the links for the associated pages.

Business Unit and Dept Charged (department charged)

If you assigned this company property to a business unit and department in the Company Property Table, the business unit and department charged for the incident appears here. Otherwise, select the Business Unit, if needed. The values come from the Business Unit Table. Select the Dept Charged, if needed. The values come from the Department Table.

Estimated Damage Amount

Enter an estimated damage amount for the Vehicle/Equipment and any other Property damaged in the incident, if an estimate is provided.

Actual Damage Amount

Enter an actual damage amount for the *Vehicle/Equipment* and any other *Property* damaged in the incident, when that information is known.

(USA) USA

DMV Reported	Select if the incident was reported to the state Department of Motor Vehicles.
DOT Reported	Select if the incident was reported to the federal Department of Transportation.
EmplID and Non-EmplID (employee ID and non-employee ID)	To track the people associated with the vehicle or heavy equipment involved in the incident, select an EmplID (employee ID) or a Non-EmplID (non-employee ID).
Role	Indicate the role of each involved person in the accident.

Tracking Incident Consequent Actions

There are three ways that you can use the Consequent Actions component to manage your health and safety program.

- Document the causes, corrective actions, and preventative actions associated with a health and safety incident.
- Document your efforts at preventative hazard control.
- Document the corrective and preventative actions that you have implemented as a result of your analysis of hazards associated with a particular job or location.

Pages Used to Track Incident Consequent Actions

Page Name	Object Name	Navigation	Usage
Consequent Actions - Corrective	HS_INC_ACTION_CRCT	Workforce Monitoring, Health and Safety, Obtain Incident Information, Identify Corr/Prevent Actions	Enter corrective and preventative actions.
Consequent Actions - Preventative	HS_INC_ACTION_PREV	Workforce Monitoring, Health and Safety, Obtain Incident Information, Identify Corr/Prevent Actions	Enter preventative actions taken to prevent workplace incidents.

Entering Corrective Actions

Access the Identify Corrective Actions - Corrective page.

Corrective Preventative

Incident Number: 19240002 Date: 05/10/2002 Injury

Causes Find | View All First 1 of 1 Last

*Hazard: *Cause:

Consequent Actions Find | View All First 1 of 1 Last

*Action Sequence: 1

Category:

Responsible ID:

*Status: Recommended

Action:

Completion Date

Estimated: Actual:

▼ Germany

Corrective Actions:

Identify Corrective Actions — Corrective page

Hazard	Select a code from the values that come from the Hazardous Materials/Conditions Table (required).
Cause	When you select a Hazard code and press TAB, the system enters the cause that you associated with the code from the Hazardous Conditions/Materials Table.
Action Sequence	The system automatically assigns the Action Sequence in numerical order for each data row that you insert.
Category	(Optional) Select a category for the action.
Responsible ID	Select the ID of the employee who is responsible for following through on the action.
Status	Enter the status of the action.
Action	For each action sequence, you can enter a description.
Estimated and Actual	When you know them, enter the estimated or actual (or both) completion dates for carrying out the action.

Note. (CAN) For users in British Columbia who report incidents to the BC WCB electronically, the required fields for the Corrective Actions page are the Hazard Code and the written statement of the Action.

(DEU) Germany**Corrective Actions**

For each action, select the appropriate code from the values established in the GER Corrective Actions Table.

Entering Preventative Actions

Access the Identify Corrective Actions - Preventative page.

The screenshot displays the 'Identify Corrective Actions - Preventative' page. At the top, there are tabs for 'Corrective' and 'Preventative', with 'Preventative' being the active tab. Below the tabs, the incident details are shown: 'Incident Number: 19240005', 'Date: 05/21/2002', and 'Safety Violation'. The main content area is divided into two sections: 'Causes' and 'Preventative Actions'. The 'Causes' section has a header bar with 'Find | View All' and navigation buttons. It contains two search fields: '*Hazard:' and '*Cause:'. The 'Preventative Actions' section also has a header bar with 'Find | View All' and navigation buttons. It contains several fields: '*Action Sequence:' (with a value of 1), 'Category:' (a dropdown menu), 'Responsible ID:' (a search field), '*Status:' (a dropdown menu with 'Recommended' selected), and 'Action:' (a text area). Below these fields is a 'Completion Date' section with 'Estimated:' and 'Actual:' date pickers. At the bottom, there are two expandable sections: 'Canada' and 'Germany'. Each section has a 'Preventative Action:' search field and an 'Other' Description' text area.

Preventative page

Causes

The fields in the causes group box are identical to those on the Consequent Actions - Corrective page.

(CAN) Canada**Preventative Action**

For each Action, select the appropriate code from the values which come from the CAN Preventative Actions Table.

'Other' Description

This field is available only to users in British Columbia when they enter the Preventative Action code 00996. Users in British Columbia may enter

descriptions of nonstandard preventative actions, which are then used in reports to the British Columbia Workers Compensation Board (BC WCB).

Users in British Columbia must first ensure that the Preventative Action codes entered in the CAN Preventative Actions Table are the approved codes that are used by the BC WCB, including the code *00996 - Other*.

If you are a user in British Columbia, and if the approved codes are entered into that table and the incident that you are currently working with has the Regulatory Region CANBC applied to it, then when you select a Preventative Action code of *00996 - Other* in the Preventative Action field on this page, the 'Other' Description field becomes available for data entry. Enter a description of the nonstandard preventative action.

Note. (CAN) For users in British Columbia who report incidents to the BC WCB electronically, the Hazard code and the Preventative Action code are required fields.

(DEU) Germany

Preventative Action	For each action, select the appropriate action from the values which come from the GER Preventative Actions Table.
----------------------------	--

Tracking Incident, Injury, and Illness Data by Individual

The summary information in this section can help you to pinpoint recurring problems certain employees have experienced. Use this page to review or enter information on one individual, to update information when you do not have the incident number at hand, and to view and update information about the incident

Note. Before you can access injury and illness data by individual, you must first create incident data and associate individuals with the incident using the Incident Details component.

See Also

Chapter 6, "Creating and Tracking Incidents," Entering Injury and Illness Details, page 75

Pages Used to Summarize Employee Injuries

Page Name	Object Name	Navigation	Usage
Employee Injury Summary	INJURY_SUMMARY	Workforce Monitoring, Health and Safety, Obtain Incident Information, Review Employee Injury Summary	View a summary of all the injuries an employee has experienced and related incident data.
Injury Details - Details	HS_INJ_DETAIL	Workforce Monitoring, Health and Safety, Obtain Incident Information, Review Employee Injury Summary Click the Show Details link.	Provide details of the injury or illness suffered by each person involved in the incident.

Viewing Employee Injury Summaries

Access the Employee Injury Summary page.

Employee Injury Summary

Patil,Naveen A
ID: KP0002
Empl Rcd#: 0

Business Unit: India SetID
Hire Date: 01/01/2002

Department: Human Resources
Employee Status: Active

Job Code: Staff

Location: M G Road, Branch

Employee Injury Summary
Customize | Find | View All | First 1 of 1 Last

Incident #	Incident Date	Incident Type	Primary Outcome	Injury Treatment	Show Details	Reportable Case		
1 19240002	05/10/2002	Injury	Illness	Medical	Show Details	Y	+	-

Employee Injury Summary page

Show Details

Once you have reviewed the summary of the employee's injuries and illnesses, click the Show Details link associated with an incident to open the Incident Details component for that incident. Review and update injury or illness information and the pages in the Incident Details component.

Be sure to save your changes before you close the pages.

(GBR) Collecting RIDDOR Data for UK Reports

Before you can run the UK Injury/Dang. Occ. Or UK Illness reports, you must run the UK Collect RIDDOR Data process.

Pages Used to Collect RIDDOR Data

Page Name	Object Name	Navigation	Usage
Collect RIDDOR Data	RUNCTL_OHS_UK	Workforce Monitoring, Health and Safety, Collect Health/Safety Data, RIDDOR Data GBR	Collect RIDDOR data for GBR Health and Safety reporting.
RIDDOR F2508	RUNCTL_OHS_UK	Workforce Monitoring, Health and Safety, Reports, Injury/Dangerous Occ GBR	Generate a report that provides injury and dangerous occurrence data about health and safety incidents required to meet the health and safety reporting requirements in the United Kingdom. (Crystal)
UK F2508A Report	RUNCTL_OHS_UK	Workforce Monitoring, Health and Safety, Reports, Illness GBR	Generate a report that provides illness information to meet the health and safety reporting requirements in the United Kingdom. (Crystal)

(MEX) Defining Mixed Committees

In Mexican companies, a mixed committee (*Comision Mixta de Seguridad e Higiene*) is formed to oversee health and safety processes and investigate work-related accidents. A similar mixed committee (*Comision Mixta de Capacitacion*) is formed to oversee the training and development process for employees.

The mixed committee is made up of an equal number of employee and employer representatives and is selected annually. Once the committee is formed, the group defines its working objectives, functions, and mechanisms.

You can now define the details for both types of mixed committees on the Mixed Committee page.

Understanding Mixed Committees for Health and Safety

In Mexico, the mixed committee for health and safety investigates the causes of work-related accidents, reviews legal decisions, registers violations of the legal decisions, and recommends health and safety preventative measures.

You can enter the information for a health and safety mixed committee on the Mixed Committee page.

Once you've defined the details for a health and safety mixed committee, there is an additional step. If a safety incident occurs on the job, you will record it on the Incident Details page.

Defining Training Legal Requirements

There are specific legal forms for the formation of the mixed committee. The Department of Labor (*STPS*) can audit all the information related to the mixed committee and its formation (STPS Form DC-1).

The formation of the committee and definition of the training plan should be submitted to the STPS through Form DC-2.

Once training is complete, your company can issue labor ability certificates to employees. Each employee who completes a course or event receives a certificate (STPS Form DC-3). A copy must be sent to the STPS.

You can now generate all the STPS reports that are used to track employee training.

Page Used to Define Mixed Committees

Page Name	Object Name	Navigation	Usage
Mixed Committee	MIX_COM_TBL_MEX	Workforce Monitoring, Health and Safety, Collect Health/Safety Data, Mixed Committee MEX	Define details for the mixed committee, including class, representatives, location, and objectives.

Defining Mixed Committees

Access the Mixed Committee page.

Mixed Committee	
Mixed Committee: Injury	
Committee Detail Find View All First ◀ 1 of 1 ▶ Last	
*Effective Date: 11/04/2002 	*Status: Active  + -
*Description:	Short Description:
*Year:	*Constitution Date: 11/04/2002 
*Class: Health & Safety 	
Representative Find View All First ◀ 1 of 1 ▶ Last	
*EmplID: B-BU139 	Santos, Rhoda + -
*Status Date: 11/04/2002 	*Status: Active 
*Type: 	
Location Find View All First ◀ 1 of 1 ▶ Last	
*Business Unit: 	+ -
*Location Code: 	
Objective Detail Find View All First ◀ 1 of 1 ▶ Last	
*Objective Year:	Sequence: 0 + -
*Type: Objective 	
Objective:	
Description:	 

Mixed Committee page

Committee Detail

Enter the details about the mixed committee, such as a description of the committee.

Year Enter the year for which the mixed committee is effective.

Constitution Date Enter the date when the mixed committee was formed.

Class Select the committee class. Values are *Health & Safety* and *Training*.

Representative

Define details for mixed committee representatives.

EmplID Select the employee ID of the representative for the mixed committee.

Type Identify the type of representative. Values are *Employee* and *Employer*.

Location

Business Unit Select the business unit that the mixed committee serves.

Location Code Identify the location where the mixed committee is available.

Objective Detail

Define the objectives, functions, and mechanisms for the mixed committee.

Objective Year Enter the year in which the mixed committee's objectives are effective.

Sequence If you have more than one objective, you can identify each objective by assigning them a sequence number.

Type Select the objective type. Values are:

- *Function*: An activity that a mixed committee needs to do.
- *Mechanism*: The way to achieve the functions or goals of a mixed committee.
- *Objective*: The goals of the period in which the committee is valid.
- *Other*: Any other information that you need to enter about the mixed committee.

Objective Enter the objective of the mixed committee.

Description Enter a description for the *Function*, *Mechanism*, *Objective*, or *Other*.

Running Incident Reports

This section explains how to generate incident reports provided in Monitor Health and Safety.

Pages Used to Run Incident Reports

Page Name	Object Name	Navigation	Usage
Non-Employees in Incidents	RUNCTL_OHS_FROMTO	Workforce Monitoring, Health and Safety, Reports, Non-Employees in Incidents	Generate Non-Employees in Incident report (OSH003) that summarizes the non-employees involved in incidents that occurred within a specified date range. It notes whether they suffered an illness or injury.
Incident Detail	RUNCTL_OHS_INC	Workforce Monitoring, Health and Safety, Reports, Incident Detail	Run the Incident Detail report (OHS009). This report lists the occurrence information, all causes and related corrective actions, witnesses, involved persons (including detailed injury information), OSHA information, lost work, and physician information.
Incident Summary	RUNCTL_OHS_FROMTO	Workforce Monitoring, Health and Safety, Reports, Incident Summary	Generate Incident Summary report (OHS010) that summarizes health and safety incidents that have occurred within a specified date range. This report lists all involved persons and indicates whether an OSHA report was filed related to a person's involvement.
Location Incident Summary	RUNCTL_OHS_FROMTO	Workforce Monitoring, Health and Safety, Reports, Location Incident Summary	Generate Location Incident Summary report (OHS011) that summarizes the incidents that occurred at specific locations and within the specified date range. The report lists all persons involved in the incident and indicates whether or not they received an OSHA reportable illness or injury.
Employees in Incidents	RUNCTL_OHS_FROMTO	Workforce Monitoring, Health and Safety, Reports, Employees in Incidents	Generate Employees In Incident report (OHS013) that summarizes employees involved in incidents that have occurred within a specified date range. It notes whether the employee has suffered an injury or illness

Page Name	Object Name	Navigation	Usage
Incident Lost Work	RUNCTL_OHS_FROMTO	Workforce Monitoring, Health and Safety, Reports, Incident Lost Work	Generate Incident Lost Work report (OHS014) that lists the lost or restricted workdays for an employee involved in a health and safety incident within a specified reporting period and totals lost and restricted days by incident.
Incident w/o Lost Wages ESP - Incident Lost Work	RUNCTL_OHS_FROMTO	Workforce Monitoring, Health and Safety, Reports, Incident w/o Lost Wages ESP	Generate (ESP) Incident Without Lost Work report (OHS014ESP). This report generates a list of accidents that didn't result in lost workdays. It includes the Employee Name, Gender, NSS, Accident Date, and Accident Type.
Vehicle Incident Summary	RUNCTL_OHS_FROMTO	Workforce Monitoring, Health and Safety, Reports, Vehicle Incident Summary	Generate the Vehicle Incident Summary report (OHS016). This report summarizes information about vehicles involved in incidents within a specified date range. The report lists the vehicle and equipment information and related information about the people involved.
Workers Comp Board Form 7	RUNCTL_OHS001CN	Workforce Monitoring, Health and Safety, Reports, WCB Form 7 CAN	Generate the Canadian Workers Compensation Board Form 7 report (OHS001CN). This report provides some of the information required for provincial WCB Form 7s. Use this report to manually transcribe information to the printed form required by the WCB in most Canadian provinces.

Page Name	Object Name	Navigation	Usage
WCB Incident CAN — Runctl Ohs Inc	RUNCTL_OHS_INC	Workforce Monitoring, Health and Safety, Reports, WCB Incident CAN	Generate the (CAN) Workers Compensation Board Incident report (OHS008CN). This report provides specific incident information required by the Canadian Worker's Compensation Board, such as incident occurrence information, work absence and work resumption, the person responsible, first aid provided, and other information required by the WCB. Use information from this report to manually complete WCB reporting forms.
Accident Report	RUNCTL_OHS001FR	Workforce Monitoring, Health and Safety, Reports, Work Accident FRA	Generate the (FRA) Work Accident Report (OHS001FR). This report tracks information on the employer, the establishment, the casualty, and details of the accident such as witnesses and other third parties. Use this information to complete the official French report. The government requires companies to produce this report within 48 hours and to send it to the Social Security Agency.
RIDDOR F2508	RUNCTL_OHS_UK	Workforce Monitoring, Health and Safety, Reports, Injury/Dangerous OCC GBR, RIDDOR F2508	Generate a report of injury or dangerous occurrence needed to meet the health and safety reporting requirements in the United Kingdom. The report output is a Crystal report that exactly duplicates the official reports. Note. Before running this report, you must run the SQR process UK Collect RIDDOR Data to load the temporary holding tables.

Page Name	Object Name	Navigation	Usage
RIDDOR F2508A	RUNCTL_OHS_UK	Workforce Monitoring, Health and Safety, Reports, Illness GBR	Generate a Case of Disease report needed to meet the health and safety reporting requirements in the United Kingdom. The report output is a Crystal report that exactly duplicates the official reports. Note. Before running this report, you must run the SQR process UK Collect RIDDOR Data to load the temporary holding tables.
Accident Report CHE — Accident Report	RUNCTL_PER002_CHE	Workforce Monitoring, Health and Safety, Reports, Accident Report CHE	Generate the (CHE) Accident Report (PER002CHE). This report provides the information required by Swiss law in a format accepted by all Swiss insurance companies. Use this report to create an accident report to submit to your organization's insurance company following an accident.

CHAPTER 7

Processing Rehabilitation, Claims, and Examination Data

This chapter tells you how to:

- Manage claims.
- Manage Australian claims threshold information.
- Track rehabilitation plans.
- Track employee medical exam results.

Managing Claims

Use the Claims Management pages to enter the details of an individual's status and assessments of the individual's ability to return to work and to track direct and indirect costs of the claims while they are open. File this information with the government or with an insurance company.

You might need to create claims before you create incidents. For example, if someone files a claim against your organization, this might be the first information you have about the incident. Later, when you find out the details of the incident and enter them in PeopleSoft Human Resources, you can link the claim and the incident in the system by entering the incident number on the Claims Management pages.

Note. For users in British Columbia who report incidents to the British Columbia Workers' Compensation Board (BC WCB) electronically, claims information must be entered on the Claims Management pages for all Incident Outcome types except *Dangerous Occurrence*.

Pages Used to Manage Claims

Page Name	Object Name	Navigation	Usage
Claim Details	HS_CLAIM_MGMT1	Workforce Monitoring, Health and Safety, Obtain Incident Information, Open Claim, Claim Details	Open claims.
Appeal Details	HS_CLAIM_APPL_SEC	Click the Click the Appeal Data link on the Claim Details page. link on the Claim Details page.	Enter details about the claim appeal.
Claim Charges	HS_CLAIM_MGMT2	Workforce Monitoring, Health and Safety, Obtain Incident Information, Open Claim	Track charges related to injury claims, including one-time medical treatments and lengthy, multiple claim-incurred costs.
Claim Provider	HS_CLAIM_MGMT3	Workforce Monitoring, Health and Safety, Obtain Incident Information, Open Claim	Enter provider reference data, the claim assessment date, and its disposition.
Open Claim — Payments and Deposits	HS_CLMCST_IND_SEC	Click the Claim Payment Details link on the Open Claim – Claim Charges page.	Enter specific information about claim payments.
Contact's Work Address	HS_CM3CAN_SEC	Click the Contact Address link on the Claim Provider page.	Enter additional address details for the claim contact in Canadian claims.

Opening Claims

Access the Open Claim - Claim Details page.

Claim Details		Claim Charges	Claim Provider
Claim Number:	00094000		
*Date Opened:	06/24/2000	Claim Status ☒ Pending ☐ Approved ☐ Denied	
Date Closed:			
Person Filing			
EmplID:	KC0005	Moore, Catherine J	
Incident Data			
Incident Number:	00000011	Incident Date:	06/15/2000
Type:	Incident		
Location:	KCBC00 Vancouver Branch		
Province:	BC British Columbia		
Country:	CAN Canada		
☐ Investigated Appeal Data			
▼ Canada WCB Claim Number: 22345			

Claim Details page (1 of 2)

▼ France
Claimant: Recipient:
▼ USA
Case Number: Date Filed:
▼ India
Medical Officer Certification ☐ Certified Date of Certification: Dependent Claims Dependent ID: Relationship:

Claim Details page (2 of 2)

Warning! To avoid maintaining two different sets of claim numbers, we recommend that you either always assign numbers manually or always let the system do it—not both.

If you choose to have the system assign the number automatically, it first appears as *00000000*. The actual number assigned to the claim appears after you save the information on the Claims Management pages. The last claim number assigned is stored in the Installation Table.

Claim Status Select whether the claim status is *Pending*, *Approved*, or *Denied*.

Date Opened The date the claim was opened appears by default to usually today's date, which you can change.

Date Closed Enter the date that the claim is resolved.

Person Filing Select either an EmplID or a Non-EmplID for the person filing.

Investigated Select if the claim will be investigated.

Incident Data

Incident Number Select an incident number to associate with the claim. The system prompts you only with incidents associated with this individual. When you press TAB, Incident Date, Type, Location, State and Country display.

You do not have to enter an incident number when you first create a claim. However, you must add an incident and save the information before you can change the Claim Status to Approved.

Appeal Data If the claim has been appealed, click this link to access the Appeal Details page.

Note. For users in British Columbia who report incidents to the BC WCB electronically, the Date Opened, Person Filing, and Incident Number fields are required for all Incident Outcome types except *Dangerous Occurrences*.

(CAN) Canada

(WCB) Claim Number Enter the Workers' Compensation Board (WCB) Claim Number.

(FRA) France

Claimant Select the claimant type.

Recipient Select the recipient type.

(USA) USA

Case Number If the claim concerns an incident to which you previously assigned an OSHA Case Number and Date Filed on the Official Report Details - USA page, then the Case Number and Date Filed fields are display only.

(IND) India

Certified Select if a medical officer has certified the claim.

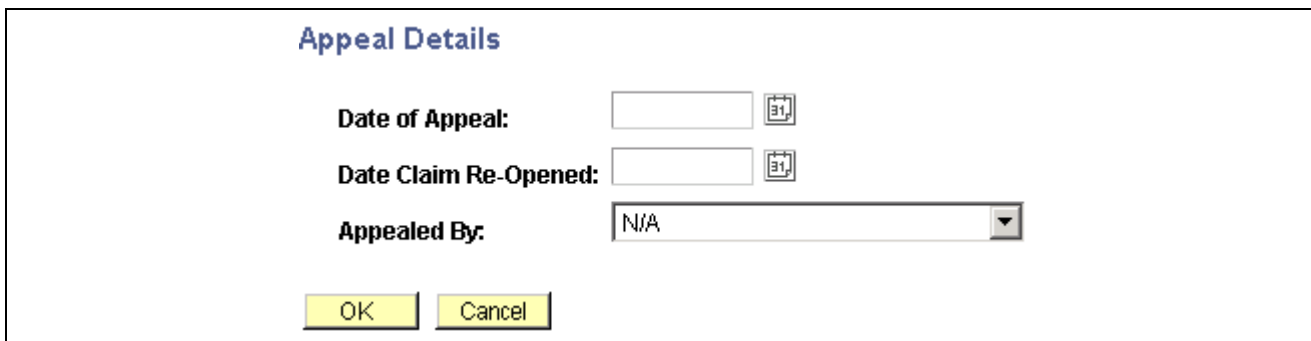
Date of Certification Enter the date of certification.

Dependent ID

For dependent claims, select the Dependent ID. Once selected, the Relationship displays.

Entering Claim Details

Access the Appeal Details page.

A screenshot of a web application window titled "Appeal Details". The window contains three input fields: "Date of Appeal:" with a date picker icon, "Date Claim Re-Opened:" with a date picker icon, and "Appealed By:" with a dropdown menu showing "N/A". At the bottom of the window are two buttons: "OK" and "Cancel".

Appeal Details

Date of Appeal: 

Date Claim Re-Opened: 

Appealed By: 

Appeal Details page

Date of Appeal

Enter the date on which the appeal was filed.

Date Claim Re-Opened

Enter the date on which the claim was re-opened.

Appealed By

Select from the available values to indicate who filed the appeal.

Tracking Claim Charges

Access the Open Claim - Claim Charges page.

Claim Details
Claim Charges
Claim Provider

Claim Number: 00094000
Incident Number: 00000011 **Incident Date:** 06/15/2000 **Claim Status:** Pending
Open Date: 06/24/2000 **Close Date:**
EmplID: KC0005 Moore, Catherine J

Claim Charges Find | View All First 1 of 1 Last
Total Claim: 275.45 USD + -
***Type of Charge:** Medical Costs

Claim Details Customize | Find | View All | First 1 of 1 Last

	*Charge Date	Charge Amount	*Currency		
1	06/15/2000	350.00	CAD	+	-

Total Type: 275.45 USD

India

[Claim Payment Details](#)

Claim Charges page

Claim Charges

Total Claim

The system displays the total charges for the claim (all charges for all types) in the currency specified for your User ID in the Operator Preferences Table. If there is no To Currency for your User ID in the Operator Preferences Table, then the system uses the base currency that you specified for your implementation in the Installation Table. (This is also true for the Currency and Total Type fields.)

Type of Charge

Select one: *Medical Costs*, *Other Costs*, and *Wage Loss*.

To add more charge types, insert additional data rows.

Claim Details

Charge Date

Enter the charge date for the claim.

Charge Amount

Enter a charge amount. Enter multiple charges for each type by adding new data rows.

Total Type

The system displays the total charges for this claim type in the currency specified for your User ID in the Operator Preferences Table.

(IND) India

Click the Claim Payment Details link to access the Payments and Deposits page where you enter details about claim payments.

Entering Claims Payment Information

Access the Payments and Deposits page.

Payments and Deposits page

Payment Type	Select if the payment type is <i>Advance Payment</i> , <i>Claim Deposit</i> , <i>Claim Payment</i> , or <i>Provisional Payment</i> .
Payment Date	Enter the payment date.
Amount	Enter the payment amount.
Recipient Type	Select if the recipient of the payment is an <i>Employee</i> , <i>Non-Employee</i> , or <i>Dependent</i> . Once selected, select the ID of the employee, non-employee, or dependent. If <i>Dependent</i> is selected, the <i>Relationship</i> displays.
Comment	Enter an optional comment about the payment.

Entering Provider Reference Data

Access the Claim Provider page.

Claim Details		Claim Charges		Claim Provider	
Claim Number:	00094000				
Incident Number:	00000011	Incident Date:	06/15/2000	Claim Status: Pending	
Open Date:	06/24/2000	Close Date:			
EmplID:	KC0005	Moore, Catherine J			
Contact ID:	KC0009	 Mills, Stephanie A			
Provider Claim Nbr:	22346	Provider Name:	Pacific Blue Cross		
Claims Manager:	Check, Sam				
Phone:	604 555 9384				
Assessment Date:	06/15/2000		Disposition:	Return with work restrictions	
Comment:	Employee has bad back				

Claim Provider page (1 of 2)

▼  Canada					
Contact Address					
▼  India					
Claim Filed Date:	11/04/2002		Claimed Amount:		
Claim Received Date:			Received Amount:		
			Unapproved Amount:		
Comment:					

Claim Provider page (2 of 2)

Contact ID Select a Contact ID (Employee ID Number), if one exists within your organization. Available values come from Personal Data.

Provider Claim Nbr Enter this, if you know it.
(provider claim number)

The provider might be a government agency, such as the Workers' Compensation Board of Canada or an insurance company.

Provider Name Enter the provider name.

Claims Manager Enter the name of the claims manager.

Assessment Date Enter an assessment date.

Disposition Select the claim disposition from the available values in the list of available options.

Note. (CAN) For users in British Columbia who report incidents to the BC WCB electronically, the *Contact ID* field is required for all Incident Outcomes other than *Dangerous Occurrence*. Click the Contact Address link to access the Claim Provider: Contact's Work Address page.

(IND) India

Claim Filed Date Enter the date the claim was filed.

Claimed Amount Enter the amount claimed.

Claim Received Date Enter the date the claim was received by the provider.

Received Amount Enter the date the amount was received.

Unapproved Amount If the amount is an unapproved amount, enter the amount here.

Comment Enter an optional comment.

Tracking Rehabilitation Plans

You develop employee rehabilitation plans when an employees is injured, and a compensation claim is filed. Rehabilitation plan information is helpful for government reporting and claims management.

Pages Used to Track Rehabilitation Plans

Page Name	Object Name	Navigation	Usage
Claims	HS_INJ_REHAB1	Workforce Monitoring, Health and Safety, Obtain Incident Information, Create Rehabilitation Plan	Associate an incident and essential claims data to rehabilitation plan details.
Restrictions	HS_INJ_REHAB2	Workforce Monitoring, Health and Safety, Obtain Incident Information, Create Rehabilitation Plan	Monitor an employee's work restrictions and modified duties included in the rehabilitation plan.
Actions	HS_INJ_REHAB3	Workforce Monitoring, Health and Safety, Obtain Incident Information, Create Rehabilitation Plan	Track the details of actions taken in the rehabilitation plan.

Associating an Incident

Access the Create Rehabilitation Plan - Claims page.

Claims		Restrictions		Actions	
Empl ID:	KC0005	Moore, Catherine J		Empl Rcd Nbr:	0
Incident Number:	00000011	Incident Date:	06/15/2000		
Incident Type:	Incident	Regulatory Region:	CANBC		
Last Work Date Before Injury:			Return Date:		

Claims Filed		Find View All		First	1 of 1	Last
Claim Number:	00094000	Open Date:	06/24/2000			
*Claim Status:	Pending	Close Date:				
Provider Claim Nbr:	22346	Pacific Blue Cross				
Assessment Date:	06/15/2000	Disposition:	Return with work restrictions			

Create Rehabilitation Plan — Claims page

You can enter the Last Date Worked Before Injury and Claims Filed information for each incident in which the individual was involved.

Last Work Date Before Injury Enter the date for the last day the employee worked before the injury.

Return Date Enter the date when the employee returned to work.

Claims Filed

If the individual has filed any claims, the information that you entered on the Claims Management pages appears here. If this information is not in the system, enter it here for each claim associated with this incident. The most important data is in the Assessment Date and Disposition fields—the governing agency or insurance company that you report the claim to uses the information in conjunction with the rehabilitation plan details.

Close Date Enter the claim close date.

Claim Status Select from the list of available options.

Provider Claim Nbr Enter the provider claim number.
(provider claim number)

Assessment Date Enter the assessment date.

Disposition Select from the list of available options.

Monitoring Work Restrictions and Duties

Access the Create Rehabilitation Plan - Restrictions page.

Claims **Restrictions** **Actions**

EmpID: KC0005 **Moore, Catherine J** **Empl Rcd#:** 0

Incident Number: 00000011 **Incident Date:** 06/15/2000 **Incident Type:** Incident

Work Restrictions Find | View All First 1 of 1 Last

From: **To:**

Work Modifications Find | View All First 1 of 1 Last

From: **To:**

Create Rehabilitation Plan — Restrictions page

- Work Restrictions** Select a code for any work restrictions that the employee has as a result of the injury or illness. Create these codes in the Work Restriction Table.
- Work Modifications** Select a code for any work modifications the employee has as a result of the injury or illness. Create these codes in the Modified Work Table.
- From/To** Enter the dates for the period that each modified work duty must apply.

Tracking Rehabilitation Action Details

Access the Create Rehabilitation Plan - Actions page.

Claims		Restrictions		Actions	
EmplID:	KC0005	Moore, Catherine J	Empl Rcd#: 0		
Incident Number:	00000011	Incident Date:	06/15/2000	Incident Type:	Incident
Rehabilitation Plan Find View All First 1 of 1 Last					
*Action Sequence:	1	Type:	+ -		
Responsible ID:	Q				
Physician:	Q				
Provider Description:					
Diagnosis:	Q				
*Action Status:	Recommended		Estimated Completion Date:	31	
			Actual Completion Date:	31	
Corrective Action:					

Create Rehabilitation Plan — Actions page

Action Sequence	The system assigns each data row with an action sequence in numerical order.
Type	Select an action type from the list of available options.
Responsible ID	If a person within your organization is coordinating the rehabilitation plan, enter or select a responsible ID (employee ID number). The available values come from Personal Data.
Physician	Select an option from the list of available options; values come from the Physician Table. Or, if you choose not to enter physicians in the Physician Table, enter the physician's name into the name field.
Provider Description	Enter a description of the provider.
Diagnosis	Select the type of diagnosis in this action; create these values in the Diagnosis Table.
Estimated Completion Date	Enter the estimated completion date of the action.
Actual Completion Date	When the action is complete, enter the actual completion date.
Action Status	Once you enter an actual completion date, change the action status.

Tracking Employee Medical Exam Results

Your organization probably requires employees to have medical examinations for a number of different reasons.

Tracking medical exam results is useful for observing and protecting the health of employees who could be at occupational risk due to their work location or job group. Use the results of exams to track risk factors, analyze trends, and compare work groups with one another to monitor work environments. You can also use the information to put together preventive health care programs for educating employees about work-related health issues.

Track this information for employees only.

Common Elements Used in Tracking Medical Exam Results

Baseline	Select if this is a baseline exam.
Referral	Select a physician referral code from the list of available options, or enter a referral directly.

Pages Used to Track Medical Exam Results

Page Name	Object Name	Navigation	Usage
Physical Exam Address/Phone	HS_EXAM_PHYSICAL1	- Workforce Monitoring, Health and Safety, Record Medical Exam Results, Physical Exam - Workforce Monitoring, Health and Safety, Review Health Card Info, Hs Exam Physical1	Maintain the exam date and type, indicate the next exam date, and enter physician address information.
Exam Details	HS_EXAM_PHYSICAL2	- Workforce Monitoring, Health and Safety, Record Medical Exam Results, Physical Exam - Workforce Monitoring, Health and Safety, Review Health Card Info, Hs Exam Physical2	Maintain physical exam results.
Hs Exam Audio1	HS_EXAM_AUDIO1	- Workforce Monitoring, Health and Safety, Record Medical Exam Results, Audiometric Exam - Workforce Monitoring, Health and Safety, Review Health Card Info, Hs Exam Audio1	Maintain audio exam details.

Page Name	Object Name	Navigation	Usage
Audiometric Exam/Address/Phone	HS_EXAM_AUDIO1	• Workforce Monitoring, Health and Safety, Record Medical Exam Results, Audiometric Exam, Audio Exam Address/Phone • Workforce Monitoring, Health and Safety, Review Health Card Info, Hs Exam Physical2	Maintain exam results, referrals, and comments.
Audiometric Exam — Exam Details	HS_EXAM_AUDIO2	• Workforce Monitoring, Health and Safety, Record Medical Exam Results, Review Health Card Info, Hs Exam Audio2 • Workforce Monitoring, Health and Safety, Record Medical Exam Results, Audiometric Exam, Exam Details	Record and review audiometric exam details.
Eye Exam - Exam Details	HS_EXAM_EYE2	• Workforce Monitoring, Health and Safety, Record Medical Exam Results, Review Health Card Info, Hs Exam Eye2 • Workforce Monitoring, Health and Safety, Record Medical Exam Results, Eye Exam	Maintain exam results, referrals, and comments.
Respiratory Exam - Exam Details	HS_EXAM_RESPIRE2	• Workforce Monitoring, Health and Safety, Record Medical Exam Results, Review Health Card Info, Hs Exam Respire2 • Workforce Monitoring, Health and Safety, Record Medical Exam Results, Respiratory Exam	Maintain exam results, referrals, restrictions, and comments.
Drug Test Data 1	GVT_DRUG_TEST1	Workforce Monitoring, Health and Safety, Record Medical Exam Results, Drug Test	Set up physician and test information for a drug test.
Drug Test Data 2	GVT_DRUG_TEST2	• Workforce Monitoring, Health and Safety, Record Medical Exam Results, Drug Test • Workforce Monitoring, Health and Safety, Record Medical Exam Results, Review Health Card Info, Drug Test Review	Maintain test results, referrals, and comments.

Entering Physical Examination Information

Access the Physical Exam Address/Phone page.

Physical Exam Address/Phone Exam Details

Granjean, Serge Employee EmplID: KF0003

Physical Exam Data Find | View All First 1 of 1 Last

*Exam Date: 04/07/2002 *Exam Type: + -

Next Exam: Phone:

Physician ID: Q

Country: Q

Address: Edit Address

▼ FRA - France

Medical Organization Code: Q

Physical Exam Address/Phone page

Exam Date

Today's date appears but can be changed, if needed. The system sorts exam result data rows by exam date.

Exam Type

Select an option from the available values.

Next Exam

The next exam date appears by default for the following exam types. You can override the defaults if the actual dates are different.

- *Annual*: Next exam is one year later.
- *Exposure*: Next exam is six weeks later.
- *Periodic Surveillance*: Next exam is six months later.

Physician ID

Select from the available values, which come from the Physician Table.

If you have selected a physician ID, the physician's address information from the Physician Table automatically fills in the address block. You can edit this address.

To fill in the address directly, select a value in the Country field. The system automatically displays the appropriate address fields by using

the standardized address formats previously set up in the Country Table. Enter the appropriate address data.

(FRA) France

Medical Organization Code Select the medical organization that completed the physical exam.

(FPS) French Public Sector

Next Medical Exam Type Select the next type of exam.

Note. The only thing that is different on the first page of each exam group is its name: depending on the component that you open, the page name will be Physical, Audiometric, Eye, Respiratory, or Drug Exam. Each of the exam 1 pages is identical, so instructions are given here only once for Physical Exam 1. This information applies to all of the exam 1 pages.

See Also

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook, “Installing PeopleSoft HRMS,” Administering Country Codes

Entering Physical Exam Results

Access the Physical Exam - Exam Details page.

The screenshot displays the 'Physical Exam - Exam Details' page. At the top, there are tabs for 'Physical Exam Address/Phone' and 'Exam Details'. Below the tabs, the employee's name 'Moore, Catherine J' and 'Employee' are shown, along with the 'EmpID: KC0005'. The main section is titled 'Physical Exam Details' and includes a 'Find | View All' link and navigation buttons for 'First', '1 of 1', and 'Last'. The exam details are as follows:

- Exam Date:** 06/24/2000
- Frequency:** Annual
- Exam Type:** Baseline (checked), Organ Donor (unchecked), Blood Donor (unchecked)
- *Blood Type:** Unknown (dropdown menu)
- Referral:** (empty dropdown menu)
- Comment:** Other than injured back, in fine condition

Physical Exam — Exam Details page (1 of 2)

The screenshot shows a web application interface for exam details. It is divided into sections for Germany and France. The Germany section includes an 'Examination Results' table with columns for 'Empl Rcd#' and 'Result'. The France section includes an 'Exam Time' section with 'This Exam' and 'Next Exam' input fields, a 'Work Capability' section with radio buttons for 'Able To Work Normally', 'Able To Work With Restrictions', and 'Unable to work', a 'Reg Region' input field with a search icon, a 'Work Restriction' table with columns for 'From Date' and 'To Date', and a 'Work Modification' table with similar columns. The bottom section is for the 'French Public Sector' and includes a 'Nber of Disability Days' input field.

Germany

Examination Results

Empl Rcd#	Result
1 0	

France

Exam Time

This Exam: Next Exam:

Work Capability

☒ Able To Work Normally
 ☐ Able To Work With Restrictions
 ☐ Unable to work

Reg Region:

Work Restriction

Customize | Find | View All | First 1 of 1 Last

From Date	To Date
Search	Search

Work Modification

Customize | Find | View All | First 1 of 1 Last

From Date	To Date
Search	Search

French Public Sector

Nber of Disability Days:

Physical Exam — Exam Details page (2 of 2)

The system displays the employee's name and employee ID at the top of the page.

- Organ Donor** Select if the employee is an organ donor.
- Blood Donor** Select if the employee is a blood donor.
- Blood Type** Select an option from the list of available options.

(FRA) France

- This Exam** Enter the time for this exam.
- Next Exam** Enter the time for the next exam.
- Work Capability** To enter information about the employee's ability to work, select the appropriate option: *Able to Work Normally*, *Able to Work With Restrictions*, *Unable to Work*.

Reg Region (regulatory region) Enter the regulatory region in which the employee works. Select from the available values, which come from the Regulatory Region Table.

Work Modification Enter this by selecting from the available values, which come from the Modified Work Table. Then enter the To and From Date for which the modification applies.

Work Restriction Enter this by selecting from the list of prompt values, which are from the Work Restrictions Table. Then enter the To and From Date for which the restriction applies.

(DEU) Germany

Result /Empl Rcd# (employee record number) For each employee record number that you enter, enter the result of the examination by selecting an option from the list of available options.

(FPS) French Public Sector

Number of Disability Days Displays the number of disability days.

Entering Hearing Exam Details

Access the Audiometric Exam - Exam Details page.

Audio Exam Address/Phone Exam Details

Moore, Catherine J Employee EmplID: KC0005

Exam Information Find | View All First 1 of 1 Last

Exam Date: 06/24/2000 Exam Type: Annual

Audiometer Serial #: 33456 ☐ Baseline

Left Ear

	250	500	1K	2K	3K	4K	5K	6K	7K	8K
Decibels:	10	10	2	2	2	2	2	2	2	2
Trouble Frequency:	☒	☒	☐	☐	☐	☐	☐	☐	☐	☐

Right Ear

	250	500	1K	2K	3K	4K	5K	6K	7K	8K
Decibels:	10	10	2	2	2	2	2	2	2	2
Trouble Frequency:	☒	☒	☐	☐	☐	☐	☐	☐	☐	☐

Hearing Classification: Abnormal Shift

Referral: Audiologist

Comment:

Audiometric Exam - Exam Details page

Decibels For each ear, enter the decibels the employee cannot hear.

Trouble Frequency For each decibel selection, select each trouble frequency.

Hearing Classification Select a hearing classification.

Entering Eye Exam Details

Access the Eye Exam - Exam Details page.

Eye Exam Address/Phone **Exam Details**

Moore, Catherine J Employee **EmpID:** KC0005

Exam Information Find | View All First 1 of 1 Last

Exam Date: 06/24/2000 **Exam Type:** Annual

Far Sight				Near Sight					
	Left		Right			Left		Right	
Corrected:					Corrected:				
Uncorrected:	20	20	20	20	Uncorrected:				

☒ **Baseline**
☐ **Correction Required**

Referral:

Color Vision
☒ **Normal**
☐ **Abnormal**

Comment:

Eye Exam — Exam Details page

Color Vision Indicate if the patient's color vision is Normal or Abnormal.

Correction Required Select this check box if the exam results indicate that this employee needs lenses or other corrective treatment.

Far Sight/Near Sight Enter the specific exam results for the Left and Right eyes, both Corrected and Uncorrected.

Entering Respiratory Exam Details

Access the Respiratory Exam - Exam Details page.

Respiratory Exam [Addr/Phone](#) **Exam Details**

Moore, Catherine J Employee **EmpID:** KC0005

Exam Information Find | View All First 1 of 1 Last

☐ **Smoker** + -

Exam Date: 06/24/2000 **Exam Type:** Annual

Date of Exposure: 06/15/2000 ☐ **Baseline**

Exposure Type: Dust

Contaminant Agent:

Business Unit: GBIBU Global Business Institute BU

Location Code: KCBC00 Vancouver Branch

Referral: Specialist

Comment: Catherine needs to get her allergies under control

Respiratory Exam — Exam Details page

Smoker	Information about the employee's history as a smoker comes from Personal Data. If the check box is unavailable, the employee is not a smoker. Selecting an available Smoker check box indicates that the employee is a smoker.
Date of Exposure	If it applies, enter the exposure date.
Exposure Type	If it applies, select an option from the list of available options.
Contaminant Agent	If it applies, select an option from the list of available options.
Business Unit	Select a business unit for the employee's work location. Define business units in the Business Unit Table. The system automatically enters the associated description.
Location Code	Select a location code for the employee's work location. You define location codes in the Location Code Table. The system automatically enters the associated description.

Setting Up Drug Testing Information

Access the Drug Test Data 1 page.

Drug Test Data 1 Drug Test Data 2

Moore, Catherine J Employee EmplID: KC0005

Exam Information Find | View All First 1 of 1 Last

*Exam Date: 11/04/2002 Testing Type: + -

Exam Time In/Out Next Exam: ☐ Union Negotiated

Physician:

Country: USA United States

Address: [Edit Address](#)

Phone:

Drug Test Data 1 page

- Exam Date** Today's date appears by default; change appropriately. The system sorts exam result data rows by exam date.
- Physician** Enter the name of the employee's physician.
- Testing Type** Select one: *For Cause*, *Mandatory*, or *Random*.
- Next Exam** Indicate when the next exam is scheduled.
- Union Negotiated** Select to indicate that the test is mandated by a union agreement.

Entering Test Results and Referrals

Access the Drug Test Data 2 page.

Drug Test Data 1 | **Drug Test Data 2**

Moore, Catherine J Employee EmpID: KC0005

Exam Information Find | View All First 1 of 1 Last

*Exam Date: 11/04/2002 Exam Type: [Dropdown] + -

Exam Results

☐ Pass ☐ Fail ☐ No Show for Exam ☐ Monitoring Required

Referral: [Dropdown]

Comment: [Text Area]

Drug Test Data 2 page

Exam Results

Select an option to indicate the exam results: Pass, Fail, No Show for Exam, or Monitoring Required.

Running Claims Reports

This section explains how to generate the claims reports.

See Also

Chapter 6, “Creating and Tracking Incidents,” Entering Injury and Illness Details, page 75

Pages Used to Run Claims Reports

Page Name	Object Name	Navigation	Usage
Claim Summary Overview	RUNCTL_OHS_FROMTO	Workforce Monitoring, Health and Safety, Reports, Claim Summary Overview	Run the Claim Summary Overview report (OHS012). This report summarizes claims that have been logged within a specified date range. The report itemizes by amounts within a Charge Type, subtotals by Charge Type, subtotals by claim, and then calculates a grand total of all charges within the reporting period.
Incident Claim Detail	RUNCTL_OHS_INC	Workforce Monitoring, Health and Safety, Reports, Incident Claim Detail	Run the Incident Claim Detail report (OHS015). This report lists the claims filed for a specific incident, the employee filing the claim, provider information related to the claim, and detailed charges (by charge type) related to the claim. The report subtotals by charge type within a claim, subtotals by the claim itself, and then provides a grand total of all claim charges for the incident.

CHAPTER 8

(CAN) Preparing to Report to the Workers Compensation Board

This chapter provides an overview of electronic reporting to the British Columbia Workers' Compensation Board (BC WCB) and tells you how to process data for BC WCB electronic data interface (EDI) reporting.

Understanding the British Columbia Workers' Compensation Board Electronic Reporting System

The British Columbia Workers' Compensation Board (BC WCB) accepts accident and injury reports electronically. Use the PeopleSoft Human Resources system to prepare these reports for your British Columbia operations. In this chapter, we discuss how to use the Electronic Data Interface (EDI) feature in PeopleSoft Human Resources to produce accident and injury report files for submission to the BC WCB by email.

Getting Approval for Electronic Reporting

You need advance approval from your local WCB office:

- To submit reports electronically.
- To use a particular type of email system for reporting.
- To use the feature in your PeopleSoft Human Resources system for BC WCB reports.
- To submit the information in electronic form.

Editing Report Data

The BC WCB expects you to perform a significant amount of editing and checking to make sure that submitted reports are complete, accurate, and compatible with the WCB mainframe system. The WCB returns incomplete files for more information.

For this reason, PeopleSoft Human Resources contains several edit checks and warnings. By following the warnings during data entry, you significantly increase the likelihood that the BC WCB will accept your report file the first time that you send it.

However, the BC WCB's mainframe computer checks for some things that PeopleSoft Human Resources cannot. For example, the BC WCB system knows whether a postal code and an address associated with it are correct or incorrect. If you send address information for which the address is correct, but the postal code is wrong, their system will detect the error and reject the file. In most cases, you solve the problem by correcting and resubmitting the report file to the BC WCB.

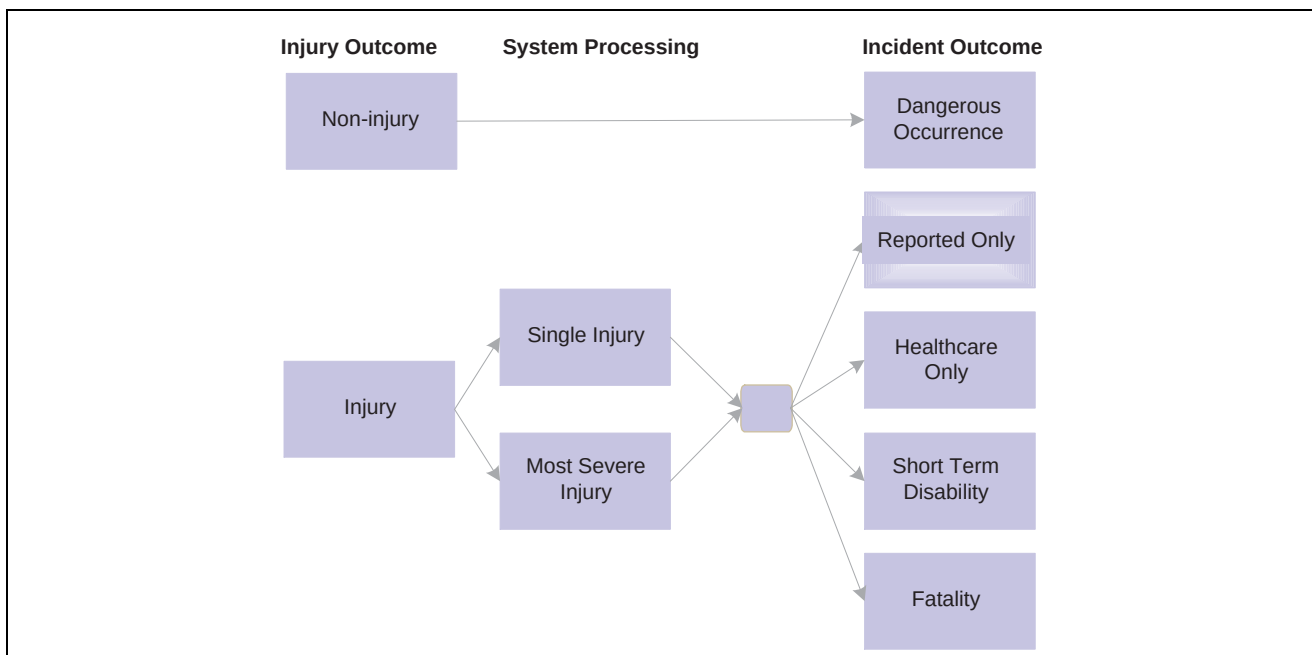
Understanding BC WCB Reporting Based Upon Incident Outcomes

The BC WCB recognizes five types of incident outcomes for health and safety incidents. The following table lists these outcomes in increasing order of severity.

Incident Outcome	Definition
Dangerous Occurrence	The least severe outcome. An event is a dangerous occurrence when no workers are injured but there is a potential for serious injuries. You complete the pages in the report about incident-related information rather than injury-related information.
Reported Only	An event in which one or more workers are injured, but the workers do not require health care treatment or lose time away from work. The workers may or may not receive first aid treatment. You report this type of event at the discretion of the employer or at the worker's request.
Health Care Only	An event in which one or more workers are injured and a health care practitioner renders care for at least one worker, but the injuries do not result in any time away from work. The workers may or may not receive first aid treatment.
Short Term Disability	An event in which one or more workers are injured, a health care practitioner renders care for at least one worker, and at least one of the injured workers requires time away from work. The workers may or may not receive first aid treatment.
Fatality	An event in which one or more workers are injured and at least one injured worker dies. First aid and health care practitioner care may have been rendered.

As a general rule, the more severe the incident outcome, the more information that you report to the BC WCB. As the amount of information required for an incident increases, the number of checks carried out by the WCB mainframe system also increases, and so does the number of checks and warnings built into your PeopleSoft Human Resources system. This means that entering a particular piece of information into your PeopleSoft system may cause the system ask you for several other pieces of information.

Also note that Dangerous Occurrence is the only *non-injury* incident outcome. The remaining categories are *injury-related* incident outcomes that have a corresponding injury outcome. Whenever you enter WCB incidents in which there is only one injured employee, the category or severity of the incident outcome is determined by the injury outcome. When more than one employee is injured, the incident outcome is automatically determined to be the most severe of the injury outcomes.



System processing derives incident outcome from injury outcome

Processing Data for British Columbia Workers' Compensation Board Electronic Data Interface Reporting

The Electronic Data Interface (EDI) report that you prepare using PeopleSoft Human Resources meets the BC WCB specifications and contains reporting data designed to cover all three of the WCB reports: Injury/Illness, First Aid, and Accident. Once you create the EDI file and have the necessary approvals, send it by email to the designated WCB office.

Here's how to prepare a report for electronic transmission:

1. Enter the required data.
2. Collect the data using the CAN Collect BC WCB EDI Data process (OHS501BC).
3. Create the EDI file using the CAN Create BC WCB EDI File process (OHS701BC).

Pages Used to Process Data for BC WCB EDI Reporting

Page Name	Object Name	Navigation	Usage
Collect WCB EDI Data	RUNCTL_OHS501BC	Workforce Monitoring, Health and Safety, Collect Health/Safety Data, WCB EDI Data CAN	Collect the data required for British Columbia WCB electronic data reporting.
Create WCB EDI File	PRCSRUNCTL	Workforce Monitoring, Health and Safety, Collect Health/Safety Data, Create WCB EDI File CAN	Create the electronic data file for submission to the local BC WCB office.

Entering Data for BC WCB Reporting

Generating usable EDI files requires careful and complete data entry. You normally complete the following categories of information:

- Incident/injury data
- Corrective preventative actions
- Non-employee information
- Employee information
- Employment information
- Claims information

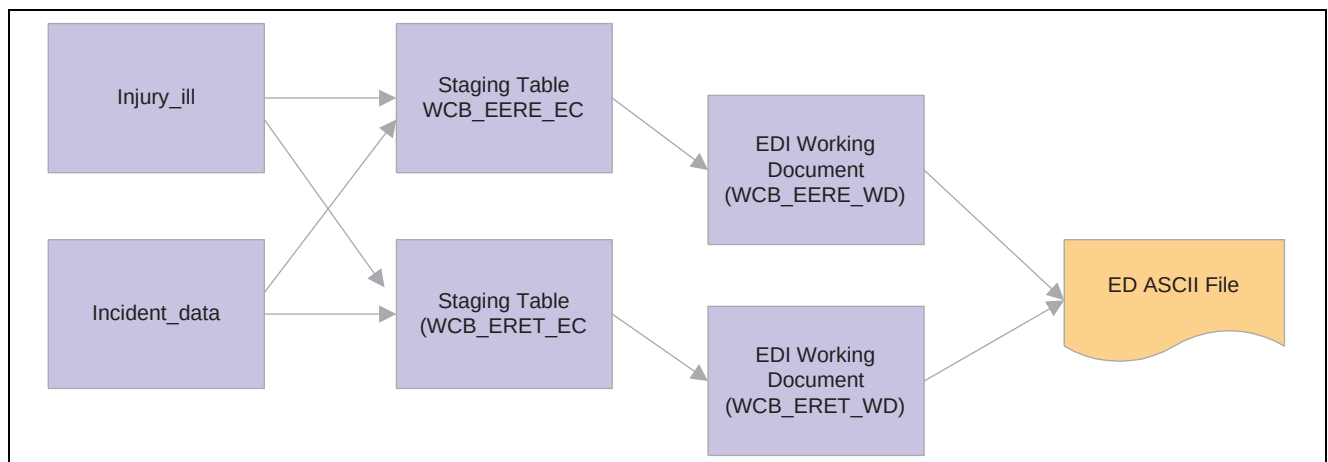
Much of the information captured in the EDI file concerns people associated with the incident. Identify them by employee or non-employee identification number(s). The WCB is concerned primarily about your employees' injuries. Non-employees' injuries are reported because they may be witnesses or investigators.

The WCB also requires contact information, such as phone numbers and addresses. For instance, note that there are a number of Canadian-specific "extra address information" pages throughout PeopleSoft Human Resources: Monitor Health and Safety PeopleBook. Fill out these pages for everyone involved in the incident; this information is used to generate records in the EDI file that are required by the WCB.

Warning! We have associated a series of data-entry checks and warning messages with key fields to remind you about key information that you must complete to meet British Columbia WCB reporting requirements. You activate these data-entry checks and warnings during data entry by applying the regulatory region and setID *CANBC* to an incident. If you do not use the proper regulatory region and setID, you could produce an EDI file that is formatted correctly but is rejected by the WCB due to missing or invalid information.

Creating an EDI File for BC WCB Reporting

Once you collect the data necessary for EDI reporting, run the CAN Create BC WCB EDI File (OHS701BC) process to create and send the EDI file. A combination of SQRW and EDI Manager generates the ASCII file. The following chart shows how the process works:



Representational generation of the ASCII EDI file

You enter and change the data on the pages and the original tables. We provide no intermediate means of editing the data in the Staging Tables. The system uses SQRs to perform the processing required to move data from its normal application table into Staging Tables that have an *EC* suffix. The Staging Tables in turn have a one-to-one correspondence with the Working Document Tables that have a *WD* suffix. These define the precise record format necessary in the EDI ASCII file. The EDI manager runs an SQR to produce the actual EDI ASCII file. The name of this file is defined by WCB. It takes the form of *xxxxxyyy.yyb*, where *xxxx* is the electronic correspondence ID, *yyyyy* represents the last five digits of the message number, and *b* is an identifier used to show whether compression or encryption has been used. The file should be compressed in ZIP format for email submission to WCB.

PeopleSoft Process Scheduler runs the Create WCB EDI File (BC) process at user-defined intervals. After the system creates the file, it saves it in the C:\Temp directory of your client workstation unless you specify otherwise. If the data is wrong in the ASCII file, then change the data on the original pages and rerun the EDI SQR to produce another ASCII file.

CHAPTER 9

(DEU) Monitoring Additional Health and Safety Incident, Injury, and Illness Data For German Employers

This chapter provides an overview of monitoring incident, injury and illness data for German employers and tells you how to:

- Review employee checklist data.
- Track illnesses.
- Assign case officers to incidents.

Understanding Incident, Injury, and Illness Data for German Employers

Most German liability insurance associations require that employers implement comprehensive health and safety programs, especially for those employees who work in hazardous conditions or with hazardous materials. PeopleSoft Human Resources enables you to track information specific to incidents that involve your German operations.

Most of the German features needed to track and report incidents, injuries, and illnesses to the liability insurance association are included within the core global pages.

Once you finish entering additional data in the pages here, you can prepare reports for your German workforce.

Reviewing German Employee Checklist Data

We have placed the German Employee Checklist page in Monitor Health and Safety so that your organization's physician can use this page to view and enter the medical examination dates and exam status for your employees in a *medical checklist*.

Note. Before your organization's physician views and updates the status and date of medical examinations using the Employee Checklist page, create medical checklists for your employees using the Checklist Table, Checklist Item Table, and Employee Checklist pages. In Workforce Administration, the Employee Checklist page appears with the Checklist Date, Checklist, Responsible ID, Comments, Checklist Sequence, and Checklist Item fields available so that you can assign customized checklists to your employees.

Page Used to Update Medical Exam Information

Page Name	Object Name	Navigation	Usage
Employee Checklist	HS_EMPL_MEDCHK_GER	Workforce Monitoring, Health and Safety, Details DEU, Employee Checklist	View and update medical examination dates and status.

Updating Medical Exam Information

Access the Employee Checklist page.

The screenshot displays the 'Employee Checklist' page. At the top, the employee's name 'Moore, Catherine J' and 'Employee' title are shown, along with 'EmplID: KC0005' and 'Empl Rcd#: 1'. Below this is a 'Checklist Description' section with a search bar and navigation controls. The main area shows a checklist entry for '11/04/2002' with a 'Checklist:' field and a 'Responsible ID:' field. A 'Comment:' field is also present. At the bottom, there is a table with columns for 'Sequence', 'Item', 'Briefing Status', and 'Status Date'. The first row shows 'Initiated' for the status and '11/04/2002' for the date.

Employee Checklist page

- ID** The employee's name and employee ID appear at the top of the page.
Use the outside scroll bar to navigate through the checklists for this employee until you find the correct medical checklist.
- Sequence** Use the inner scroll bar to navigate through the Sequence numbers and exam types (Items) until you find the exam that you want to update.
- Briefing Status** Update the exam status, or Briefing Status, by selecting from the list of available options.

Tracking Illnesses for German Employees

German laws and insurers require employers to track and report detailed occupational illness data. In Germany, all illnesses are tracked using the GER Illness Tracking component. The information that you enter on these pages is used in the GER Illness Report.

Pages Used to Track Illnesses

Page Name	Object Name	Navigation	Usage
Illness Profile	HS_ILLNESS1_GER	Workforce Monitoring, Health and Safety, Details DEU, Illness Tracking	Establish an illness number and track details about illnesses.
Job Data	HS_ILLNESS2_GER	Workforce Monitoring, Health and Safety, Details DEU, Illness Tracking	Describe employee circumstances.
Job-Related Cause	HS_ILLNESS3_GER	Workforce Monitoring, Health and Safety, Details DEU, Illness Tracking Cause	Enter information about the job-related cause for each of the individual's illnesses.
Payment/Work	HS_ILLNESS4_GER	Workforce Monitoring, Health and Safety, Details DEU, Illness Tracking	Enter data about employee compensation and insurance related to an illness.
Medical Details	HS_ILLNESS5_GER	Workforce Monitoring, Health and Safety, Details DEU, Illness Tracking	Enter information about the attending doctor, hospital, medical diagnoses, and autopsy.
Corrective Actions	HS_ILLNESS6_GER	Workforce Monitoring, Health and Safety, Details DEU, Illness Tracking	Enter the causes and corrective actions for occupational illnesses.
Illness Tracking - Preventative Actions	HS_ILLNESS7_GER	Workforce Monitoring, Health and Safety, Details DEU, Illness Tracking	Enter the causes and preventative actions for occupational illnesses. This page is nearly identical to the Corrective Actions page.

Establishing an Illness Profile

Access the Illness Profile page.

Illness Profile page

Illness Number

You may either enter an Illness Number or let the system assign one, which it will do when you save your work.

Note. To prevent having two sets of numbers and to avoid confusion, we recommend that you either always enter the illness number yourself or always let the system assign numbers automatically.

If an individual has more than one illness, then insert additional data rows to add additional illnesses.

Regulatory Region

Enter the regulatory region.

Case Officer ID

Select a Case Officer ID, which is the employee identification number of a person assigned to be a case officer of the type *Company Physician* for this individual's setID and location.

Case officer information is set up on the GER Case Officer Table and the Employee Details - Germany page. Case officers are assigned to employees on the GER Job Data page.

Occ. Illness (occupational illness)

Select an occupational illness code; these values come from the Occupational Illnesses Table.

Disease Class

The system displays the disease class that is associated with the occupational illness that you selected. Disease class values come from the GER Disease Class Table. Use the values for occupational illnesses and disease classes that are defined by your employer's liability insurance association.

Incident Related

Select this check box to indicate that the illness is incident related.

Incident Number	If you select the Incident Related check box, the Incident Number field becomes available for data entry. Select a value from Incident Details.
Illness Start Date	Enter the illness start date.
Result	Select an option from the list of available options.
Symptoms	Enter a brief description.
Checkup Results	Enter exam results.

Describing Employee Circumstances

Access the Job Data page.

The screenshot displays the 'Job Data' page for employee KD0001. At the top, there are tabs for 'Illness Profile', 'Job Data' (selected), 'Job-Related Cause', 'Payment/Work', 'Medical Details', and 'Corrective Actions'. Below the tabs, employee information is shown: EmplID: KD0001, Name: Breit-Gossmann, Heiner, Empl Rcd#: 0, Date of Birth: 12/01/1934, Date of Death: (blank), Gender: M. A 'Job Data' section is expanded, showing a table with columns for 'Find', 'View All', 'First', '1 of 1', 'Last', and 'Illness Number'. The table contains one entry for 'Employee Job Data' with DeptID: 10200 (Headquarters), Job Code: 350000 (Country Manager), and status 'Active'. Below the table are four checkboxes: 'Owner Partner', 'Partner', 'Incompetent', and 'Relation'.

Job Data page

The system displays the employee's data from Personal Data if the individual is an employee, and from Non-Employee Details if not.

Illness Number	If the system stores data on multiple illnesses for the individual, then use the scroll bar to navigate between them to view and update information.
Current Job	If the individual is a non-employee, enter a brief description of the current job.
Owner Partner	Select this check box, if appropriate; Partner and Relation check boxes are unavailable for data entry.
Partner	Select this check box, if appropriate; Owner Partner and Relation check boxes are unavailable for data entry.
Incompetent	Select this check box, if appropriate.
Relation	When you select the Relation check box, the associated relationship field appears. Specify the person's family relationship by selecting an option.

Entering Information About Job-Related Illnesses

Access the Job-Related Cause page.

The screenshot shows the 'Job-Related Cause' page. At the top, there are tabs: 'Illness Profile', 'Job Data', 'Job-Related Cause' (active), 'Payment/Work', 'Medical Details', and 'Corrective Actions'. Below the tabs, employee information is displayed: 'EmplID: KD0001', 'Breit-Gossmann, Heiner', and 'Empl Rcd#: 0'. The main section is titled 'Job-Related Cause' and includes a 'Find | View All' link and pagination 'First 1 of 1 Last'. The 'Illness Number' field has expand/collapse buttons. Below it, the 'Use Current Job Details' checkbox is checked. The 'Job Code' is '350000' and the 'Current Job' is 'Country Manager'. There are also fields for 'From/To' dates, 'Work Responsible', 'Work Dangers', and a 'Comment' text area.

Job-Related Cause page

Use Current Job Details, Job Code, Current Job

If the individual is an employee and you select the Use Current Job Details check box, the Job Code and Current Job fields automatically display the employee's most current job data, and these fields are unavailable for data entry. If the individual is an employee and you do not select the Use Current Job Details check box, then you must enter the Current Job information directly into the field.

For non-employees, the Use Current Job Details check box and Job Code field are unavailable for data entry. You can enter information directly into the Current Job field.

From/To

Enter the dates for the individual's job.

Work Responsible, Work Dangers

Provide more information about the activity and associated hazards that caused the illness.

Entering Compensation and Insurance Information

Access the Payment/Work page.

Illness Profile Job Data Job-Related Cause **Payment/Work** Medical Details Corrective Actions

EmpID: KD0001 Breit-Gossmann, Heiner Empl Rcd#: 0

Payments/Work Details Find View All First 1 of 1 Last

Illness Number: + -

Payments

☒ Payments Continue Until Date: 11/30/2002

Work

☐ Work After Start Start Date:

Work Stop: Stop Date:

Patient's Residence:

Payment/Work page

Patient's Residence Identify the residence where the individual is convalescing.

Payments

Payments Continue, Until Date If the employee has the right to collect compensation payments, select the Payments Continue check box and indicate when the payments are scheduled to stop in the Until Date field.

Work

Work After Start Select this check box if the employee has resumed working after an illness.

Start Date If you selected the Work After Start check box, enter the date when the employee resumed work.

Work Stop, Stop Date Indicate when the employee stopped work by selecting from the list of available options, and enter the corresponding date.

Entering Medical Details

Access the Medical Details page.

Illness Profile | Job Data | Job-Related Cause | Payment/Work | **Medical Details** | Corrective Actions

EmplID: KD0001 Breit-Gossmann,Heiner Empl Rcd#: 0

Physician/Medical Details Find | View All First 1 of 1 Last

Illness Number: [] + -

Autopsy

☐ Autopsy Date: [] Physician: []

☐ Fatality Result: []

Physician/Hospital Information Find | View All First 1 of 1 Last

*Type of Health Care: 1st Treatment (Physician) + -

Physician ID: [] []

Medical Facility: [] []

Phone: [] [Edit Address](#)

Medical Diagnoses Customize | Find | View All First 1 of 1 Last

	*Diagnosis		
1	K00020 []	Common cold	+ -

Medical Details page

Autopsy

Fatality

If the individual died as a result of the occupational illness, select this check box.

Autopsy

If an autopsy was performed, select the this check box.

Date

Enter the autopsy date.

Physician

Enter the name of the physician who performed the autopsy.

Result

Enter the autopsy result.

Physician/Hospital Information

Type of Health Care

If the individual received health care, enter the type of health care from the list of available options.

Physician ID

Select a physician ID (non-employee ID). This data comes from the Physician Table. When you select a physician, the physician's name appears. If the physician ID that you need to select is not on the list, then add that physician by using the Physician Table.

Medical Facility

Select a Medical Facility code from the list of available options. This data comes from the Medical Facilities Table. When you select a medical facility, the facility name appears. If the medical facility that you need to select is not on the list, then add that facility by using the Medical Facilities Table.

Edit Address

Click this button to view and edit the medical facility's address on another page.

Medical Diagnoses**Diagnosis**

For each medical diagnosis provided by a physician, select a Diagnosis code from the list of available options. These values come from the Diagnosis Table. If there are multiple medical diagnoses, insert a data row to add a Diagnosis code for each.

Entering Corrective Actions

Access the Corrective Actions page.

The screenshot displays the 'Corrective Actions' page within the 'Illness Tracking' system. At the top, a navigation bar includes tabs for 'Illness Profile', 'Job Data', 'Job-Related Cause', 'Payment/Work', 'Medical Details', and 'Corrective Actions'. Below this, employee details are shown: 'EmplID: KD0001', 'Breit-Gossmann, Heiner', and 'Empl Rcd#: 0'. The main content area is titled 'Causes/Corrective Actions' and features three distinct sections. The first section, 'Illness Number:', includes a search icon and '+'/'-' buttons. The second section, 'Causes', contains 'Hazard:' and 'Cause:' fields with search icons and '+'/'-' buttons. The third section, 'Corrective Actions', includes 'Action Sequence:' (set to 1), 'Corrective Actions:', 'Responsible ID:', '*Status:' (set to 'Recommended'), 'Action:', and 'Completion Date' (with 'Estimated' and 'Actual' date pickers). Each section has its own search icon and '+'/'-' buttons.

Illness Tracking — Corrective Actions page

Causes**Hazard, Cause**

You must select a Hazard code from the list of available options; values come from the Hazardous Materials/Conditions Table. The Cause field is display only.

Corrective Actions**Action Sequence**

The system automatically assigns this field in numerical order for each data row that you insert.

Corrective Actions	Select a code from the list of available options; values come from the GER Corrective Actions Table.
Responsible ID	Select or enter the ID of the employee who is responsible for following through on the action.
Action	Enter a description for the corrective action.
Completion Date	
Estimated, Actual	When you know them, enter the estimated or actual completion date for the corrective action.

Note. The Preventative Actions page is identical to the Corrective Actions page except that Corrective Actions field becomes Prevent Act.

Entering Case Officer Information for German Employees

Enter information about the case officer assigned to an incident that involves one of your German employees.

Page Used to Assign Case Officers

Page Name	Object Name	Navigation	Usage
Details DEU - Job Data	HS_JOB_DATA_GER	Workforce Monitoring, Health and Safety, Details DEU, Job Data	Assign case officers from a particular setID and location to be responsible for an injured or ill employee's case.

Assigning Case Officers

Access the Details DEU - Job Data page.

Details DEU - Job Data page

Case Officers

Officer Type Select a type for the case officer from the list of available options.

Case Officer ID

Select an option from list of available options. The case officers whose names appear are those assigned to this employee's setID and location in the GER Case Officer Table.

Note. Employees in your organization are designated as case officers in Employee Details - GER. These case officers are classified by their type and associated with a particular setID and location in the GER Case Officer Table.

Form Officer

If the Officer Type is *Company Physician* and you select the Form Officer check box, then this case officer is used in the GER Illness Report for illnesses.

If the Officer Type is *Health and Safety Specialist* and you select the Form Officer check box, then this case officer is used in the GER Accident Report for incidents that are injuries and fatalities.

Running German Monitor Health and Safety Reports

This section explains how to generate the Monitor Health and Safety reports provided for German employers.

Pages Used to Run German Health and Safety Reports

Page Name	Object Name	Navigation	Usage
Accident Report	RUNCTL_OHS001GR	Workforce Monitoring, Health and Safety, Reports, Accident DEU	Run the Accident Report (OHS001GR). This report provides information about the person injured, body parts, physician and hospital data, injury source and nature, unsafe acts, hazards, causes, corrective or preventative actions, and witnesses for the incident that you select.
Reportable Accident/Illness	RUNCTL_OHS002GR	Workforce Monitoring, Health and Safety, Reports, Reportable Accident/Illness	Run the Reportable Accident/Illness report (OHS002GR) that produces a Reportable Accident /Illness report for Germany.
Incident Location Summary	RUNCTL_OHS003GR	Workforce Monitoring, Health and Safety, Reports, Incident Location Summary DEU	Run the Incident Location Summary report (OHS003GR). This report provides information about travel, mode of transportation, details about whether drugs were involved, and details about individuals associated with the incident.
Illness Report	RUNCTL_OHS004GR	Workforce Monitoring, Health and Safety, Reports, Illness DEU	Use this page to run: - The SQR process GER Collect Illness Data (OHS004GR) that loads the temporary data tables. - The Illness report (OHS004GR). This report includes information about the individual, including personal data, nationality, children, job, and physician. Note. Before you run the Illness report, you must enter details of the illness using the Details DEU - Illness Tracking component and run the Collect Illness Data process.

See Also

Chapter 6, “Creating and Tracking Incidents,” page 47

Glossary of PeopleSoft Terms

absence entitlement	This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.
absence take	This element defines the conditions that must be met before a payee is entitled to take paid time off.
account	You use an account code to record and summarize financial transactions as expenditures, revenues, assets, or liabilities balances. The use of this delivered PeopleSoft ChartField is typically defined when you implement PeopleSoft General Ledger.
accounting class	In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.
accounting date	The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.
accounting entry	A set of related debits and credits. An accounting entry is made up of multiple accounting lines. In most PeopleSoft applications, accounting entries are always balanced (debits equal credits). Accounting entries are created to record accruals, payments, payment cancellations, manual closures, project activities in the general ledger, and so forth, depending on the application.
accounting split	The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.
accumulator	You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.
action reason	The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another and a reason for that action. Action reasons are used by PeopleSoft Human Resources, PeopleSoft Benefits Administration, PeopleSoft Stock Administration, and the COBRA Administration feature of the Base Benefits business process.
activity	In PeopleSoft Enterprise Learning Management, an instance of a catalog item delivery method it may also be called a class. The activity defines such things as meeting times and locations, instructors, reserved equipment and materials, and detailed costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.
allocation rule	In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure

	from the current node to the root node, checking each node for plans that contain allocation rules.
alternate account	A feature in PeopleSoft General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.
application agent	An application agent is an online agent that is loaded into memory with a PeopleSoft page. It detects when a business rule has been triggered and determines the appropriate action.
asset class	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
attachment	In PeopleSoft Enterprise Learning Management, nonsystem-defined electronic material that supplements a learning resource, such as an equipment items user handbook or the site map of a large facility.
background process	In PeopleSoft, background processes are executed through process-specific COBOL programs and run outside the Windows environment.
benchmark job	In PeopleSoft Workforce Analytics, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
branch	A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.
budgetary account only	An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called system-maintained account.
budget check	In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.
budget control	In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.
budget period	The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.
business event	In PeopleSoft Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).
catalog item	In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, Introduction to Microsoft Word. A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods.
category	In PeopleSoft Enterprise Learning Management, a way to classify catalog items so that users can easily browse and search relevant entries in the learning catalog. Categories can be hierarchical.
ChartField	A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft application. ChartField values represent individual account numbers, department codes, and so forth.
ChartField balancing	You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.

ChartField combination edit	The process of editing journal lines for valid ChartField combinations based on user-defined rules.
ChartKey	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
child	In PeopleSoft Tree Manager trees, a child is a node or detail on a tree linked to another, higher-level node (referred to as the parent). Child nodes can be rolled up into the parent. A node can be a child and a parent at the same time depending on its location within the tree.
Class ChartField	A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called <i>sub-classification</i> .
clone	In PeopleCode, to make a unique copy. In contrast, to <i>copy</i> may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.
collection	To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleSoft maintains a set of collections (one per language code) for each search index object.
compensation object	In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.
compensation structure	In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.
configuration parameter catalog	Used to configure an external system with PeopleSoft. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.
configuration plan	In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.
content reference	Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.
context	In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.
corporate account	Equivalent to the Account ChartField. Distinguishes between the chart of accounts typically used to record and report financial information for management, stockholders, and the general public, as opposed to a chart of statutory (alternate) accounts required by a regulatory authority for recording and reporting financial information.
cost profile	A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.
cost row	A cost transaction and amount for a set of ChartFields.

data acquisition	In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).
data elements	Data elements, at their simplest level, define a subset of data and the rules by which to group them. For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.
data row	Contains the entries for each field in a table. To identify each data row uniquely, PeopleSoft applications use a key consisting of one or more fields in the table.
data validation	In PeopleSoft Enterprise Incentive Management, a process of validating and cleansing the feed data to resolve conflicts and make the data processable.
DAT file	This text file, used with the Verity search engine, contains all of the information from documents that are searchable but not returned in the results list.
delivery method	In PeopleSoft Enterprise Learning Management, identifies a learning activity's delivery method type. An activity can have one or more delivery methods.
delivery method type	In PeopleSoft Enterprise Learning Management, specifies a method that your organization uses to deliver learning activities, for example, scheduled or self-paced learning.
distribution	The process of assigning values to ChartFields. A distribution is a string of ChartField values assigned to items, payments, and budget amounts.
double byte character	If you're working with Japanese or other Asian employees, you can enter the employee's name using double-byte characters. The standard double byte character set name format in PeopleSoft applications is: [last name] space [first name].
dynamic tree	A tree that takes its detail values dynamically directly from a table in the database, rather than from a range of values entered by the user.
edit table	A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft application, they can be validated against an edit table to ensure data integrity throughout the system.
effective date	A method of dating information in PeopleSoft applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.
EIM job	Abbreviation for <i>Enterprise Incentive Management job</i> . In PeopleSoft Enterprise Incentive Management, a collection of job steps that corresponds to the steps in an organization's compensation-related business process. An EIM job can be stopped to allow manual changes or corrections to be applied between steps, and then resumed from where it left off, continuing with the next step. A run can also be restarted or rolled back.
EIM ledger	Abbreviation for <i>Enterprise Incentive Management ledger</i> . In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.
equipment	In PeopleSoft Enterprise Learning Management, resource items that can be assigned to a training facility, to a specific training room, or directly to an activity session. Equipment items are generally items that are used (sometimes for a fee) and returned after the activity is complete.

event	Events are predefined points either in the application processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program associated with that component and that event. Examples of events are FieldChange, SavePreChange, and OnRouteSubscription. In PeopleSoft Human Resources, <i>event</i> also refers to incidents that affect benefits eligibility.
event propagation process	In PeopleSoft Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects. Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.
external system	In PeopleSoft, any system that is not directly compiled with PeopleTools servers.
fact	In PeopleSoft applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.
filter	In PeopleSoft applications, a filter creates a subset of information. Filters are used in templates to limit your information from a pick list of attribute values.
generic process type	In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.
group	Any set of records associated under a single name or variable in order to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.
homepage	Users can personalize the homepage, or the page that first appears when they access the portal.
incentive object	In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, user interaction objects, and so on.
incentive rule	In PeopleSoft Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.
key	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
learner group	In PeopleSoft Enterprise Learning Management, a group of learners within the same learning environment that share the same attributes, such as department or job code.
learning activity	See <i>activity</i> .
learning history	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities.
learning plan	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned and in-progress learning activities.
ledger mapping	You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as <i>rates</i>) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.

level	A section of a tree that organizes groups of nodes.
library section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.
linked section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.
linked variable	In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.
load	The feature that initiates a process to automatically load information into a PeopleSoft application for example, populating the PeopleSoft Benefits database with plan-level election information.
local functionality	In PeopleSoft HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.
location	Locations enable you to indicate the different types of addresses for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location indicated by a <i>1</i> is the address you use most often and may be different from the main address.
market template	In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.
material	In PeopleSoft Enterprise Learning Management, a resource item that can be assigned to the sessions of an activity. Material items are generally consumed during the duration of an activity and not returned, and they may have an associated cost.
message definition	An object definition specified in PeopleSoft Application Designer that contains message information for PeopleSoft Application Messaging.
meta-SQL	Meta-SQL constructs expand into platform-specific SQL substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.
metastring	Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.
multibook	Processes in PeopleSoft applications that can create both application entries and general ledgers denominated in more than one currency.
multicurrency	The ability to process transactions in a currency other than the business unit's base currency.
objective	In PeopleSoft Enterprise Learning Management, an individual's learning goal. An example of a learning goal is a competency gap.
override	In PeopleSoft Enterprise Incentive Management, the ability to make a change to a plan that applies to only one plan context.
pagelet	Each block of content on the homepage is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft and non-PeopleSoft content.

parent node	A tree node linked to lower-level nodes or details that roll up into it. A node can be a parent and a child at the same time, depending on its location within the tree.
participant	In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.
participant object	Each participant object may be related to one or more compensation objects. See also <i>participant object</i> .
payout	In PeopleSoft Enterprise Incentive Management, the resulting incentive plan computation that is provided to payroll.
PeopleCode	PeopleCode is a proprietary language, executed by the PeopleSoft application processor. PeopleCode generates results based upon existing data or user actions. By using business interlink objects, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.
PeopleCode event	An action that a user takes upon an object, usually a record field, that is referenced within a PeopleSoft page.
PeopleSoft Internet Architecture	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of an RDBMS, an application server, a Web server, and a browser.
performance measurement	In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.
period context	In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.
per seat cost	In PeopleSoft Enterprise Learning Management, the cost per learner, based on the total activity costs divided by either minimum attendees or maximum attendees. Organizations use this cost to price PeopleSoft Enterprise Learning Management activities.
plan	In PeopleSoft Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.
plan context	In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context. If three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.
plan section	In PeopleSoft Enterprise Incentive Management, a segment of a plan that handles a specific type of event processing.
plan template	In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.
portal registry	In PeopleSoft applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that

	defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.
private view	A user-defined view that is available only to the user who created it.
process	See <i>Batch Processes</i> .
process definition	Process definitions define each run request.
process instance	A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.
process job	You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.
process request	A single run request, such as an SQR, a COBOL program, or a Crystal report that you run through PeopleSoft Process Scheduler.
process run control	A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.
product category	In PeopleSoft Enterprise Incentive Management, indicates an application in the Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.
publishing	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
record definition	A logical grouping of data elements.
record field	A field within a record definition.
record group	A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.
record input VAT flag	Abbreviation for <i>record input value-added tax flag</i> . Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Expenses, where it is assumed that you are always recording only input VAT.
record output VAT flag	Abbreviation for <i>record output value-added tax flag</i> . See <i>record input VAT flag</i> .
reference data	In PeopleSoft Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, channels, and so on.
reference object	In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).
reference transaction	In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to

	automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.
relationship object	In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.
results management process	In PeopleSoft Sales Incentive Management, the process during which compensation administrators may review processing results, manually change transactions, process draws, update and review payouts, process approvals, and accumulate and push payments to the EIM ledger.
role user	A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.
role	Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.
roll up	In a tree, to roll up is to total sums based on the information hierarchy.
routing	Connects activities in PeopleSoft Workflow. Routings specify where the information goes and what form it takes email message, electronic form, or worklist entry.
run control	A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.
run control ID	A unique ID to associate each user with his or her own run control table entries.
run-level context	In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.
search query	You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.
section	In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.
security event	In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.
self-service application	Self-service refers to PeopleSoft applications that are accessed by end users with a browser.
session	In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.
session template	In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise

	Learning Management activity characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.
setup relationship	In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.
sibling	A tree node at the same level as another node, where both roll up into the same parent. A node can be a sibling, parent, and child all at the same time, depending on its location in the tree.
single signon	With single signon, users can, after being authenticated by a PeopleSoft application server, access a second PeopleSoft application server without entering a user ID or password.
source transaction	In commitment control, any transaction generated in a PeopleSoft or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.
SpeedChart	A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.
SpeedType	A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.
SQR	See <i>Structured Query Report (SQR)</i> .
statutory account	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.
step	In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.
Structured Query Report (SQR)	A type of printed or displayed report generated from data extracted from a PeopleSoft SQL-based relational database. PeopleSoft applications provide a variety of standard SQRs that summarize table information and data. You can use these reports as is, customize them, or create your own.
Summary ChartField	You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).
summary ledger	An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.
summary tree	A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the <i>basis</i> tree). A summary tree structure specifies the details on which the summary trees are to be built.

table	The underlying PeopleSoft data format, in which data is stored by columns (fields) and rows (records, or instances).
TableSet sharing	Specifies control table data for each business unit so that redundancy is eliminated.
target currency	The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.
template	A template is HTML code associated with a Web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.
territory	In PeopleSoft Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.
TimeSpan	A relative period, such as year-to-date or current period, that can be used in various PeopleSoft General Ledger functions and reports when a rolling time frame, rather than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Projects.
transaction allocation	In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.
transaction loading process	In PeopleSoft Enterprise Incentive Management, the process during which transactions are loaded into Sales Incentive Management. During loading, the source currency is converted to the business unit currency while retaining the source currency code. At the completion of this stage, the transaction is in the first state.
transaction state	In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and picked up by a different section for further processing.
transaction type	In PeopleSoft Enterprise Incentive Management, a way to categorize transactions to identify specific transaction types (for example, shipment, order, opportunity, and so on). Plan sections process only one type of transaction type. Transaction types can be defined based on a company's specific processes model.
Translate table	A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.
tree	The graphical hierarchy in PeopleSoft systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.
unclaimed transaction	In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.
uniform resource locator (URL)	In PeopleSoft, the term URL refers to the entire query string. The following is an example of a URL: <code>http://serverx/InternetClient/InternetClientServlet?ICType=Script&ICScriptProgramName=WEBLIB_BEN_401k.PAGES.FieldFormula.iScript_Home401k</code>
universal navigation header	Every PeopleSoft portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to

providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.

URL

See *uniform resource locator (URL)*.

user interaction object

In PeopleSoft Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).

variable

In PeopleSoft Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.

warehouse

A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.

worksheet

A way of presenting data through a PeopleSoft Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.

workflow

The background process that creates a list of administrative actions based on selection criteria and specifies the procedure associated with each action.

worklist

The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.

zero-rated VAT

Abbreviation for *zero-rated value-added tax*. A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged.

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