PeopleSoft®

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Monitor Health and Safety

April 2005

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Monitor Health and Safety
SKU HRCS89MP1HHS-B 0405
Copyright © 1988-2005 PeopleSoft, Inc. All rights reserved.

All material contained in this documentation is proprietary and confidential to PeopleSoft, Inc. (“PeopleSoft”), protected by copyright laws and subject to the nondisclosure provisions of the applicable PeopleSoft agreement. No part of this documentation may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, including, but not limited to, electronic, graphic, mechanical, photocopying, recording, or otherwise without the prior written permission of PeopleSoft.

This documentation is subject to change without notice, and PeopleSoft does not warrant that the material contained in this documentation is free of errors. Any errors found in this document should be reported to PeopleSoft in writing.

The copyrighted software that accompanies this document is licensed for use only in strict accordance with the applicable license agreement which should be read carefully as it governs the terms of use of the software and this document, including the disclosure thereof.

PeopleSoft, PeopleTools, PS/nVision, PeopleCode, PeopleBooks, PeopleTalk, and Vantive are registered trademarks, and Pure Internet Architecture, Intelligent Context Manager, and The Real-Time Enterprise are trademarks of PeopleSoft, Inc. All other company and product names may be trademarks of their respective owners. The information contained herein is subject to change without notice.

Open Source Disclosure

PeopleSoft takes no responsibility for its use or distribution of any open source or shareware software or documentation and disclaims any and all liability or damages resulting from use of said software or documentation. The following open source software may be used in PeopleSoft products and the following disclaimers are provided.

Apache Software Foundation

This product includes software developed by the Apache Software Foundation (http://www.apache.org/). Copyright © 1999-2000 The Apache Software Foundation. All rights reserved.

THIS SOFTWARE IS PROVIDED “AS IS” AND ANY EXPRESSED OR IMPLIED WARRANTIES, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE ARE DISCLAIMED. IN NO EVENT SHALL THE APACHE SOFTWARE FOUNDATION OR ITS CONTRIBUTORS BE LIABLE FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, EXEMPLARY, OR CONSEQUENTIAL DAMAGES (INCLUDING, BUT NOT LIMITED TO, PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES; LOSS OF USE, DATA, OR PROFITS; OR BUSINESS INTERRUPTION) HOWEVER CAUSED AND ON ANY THEORY OF LIABILITY, WHETHER IN CONTRACT, STRICT LIABILITY, OR TORT (INCLUDING NEGLIGENCE OR OTHERWISE) ARISING IN ANY WAY OUT OF THE USE OF THIS SOFTWARE, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGE.

OpenSSL

Copyright © 1998-2003 The OpenSSL Project. All rights reserved.

This product includes software developed by the OpenSSL Project for use in the OpenSSL Toolkit (http://www.openssl.org/).

THIS SOFTWARE IS PROVIDED BY THE OpenSSL PROJECT “AS IS” AND ANY EXPRESSED OR IMPLIED WARRANTIES, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE ARE DISCLAIMED. IN NO EVENT SHALL THE OpenSSL PROJECT OR ITS CONTRIBUTORS BE LIABLE FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, EXEMPLARY, OR CONSEQUENTIAL DAMAGES (INCLUDING, BUT NOT LIMITED TO, PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES; LOSS OF USE, DATA, OR PROFITS; OR BUSINESS INTERRUPTION) HOWEVER CAUSED AND ON ANY THEORY OF LIABILITY, WHETHER IN CONTRACT, STRICT LIABILITY, OR TORT (INCLUDING NEGLIGENCE OR OTHERWISE) ARISING IN ANY WAY OUT OF THE USE OF THIS SOFTWARE, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGE.

SSLeay

Copyright © 1995-1998 Eric Young. All rights reserved.

This product includes cryptographic software written by Eric Young (eay@cryptsoft.com). This product includes software written by Tim Hudson (tjh@cryptsoft.com). Copyright © 1995-1998 Eric Young. All rights reserved. THIS SOFTWARE IS PROVIDED BY ERIC YOUNG "AS IS" AND ANY EXPRESS OR IMPLIED WARRANTIES, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE ARE DISCLAIMED. IN NO EVENT SHALL THE AUTHOR OR CONTRIBUTORS BE LIABLE FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, EXEMPLARY, OR CONSEQUENTIAL DAMAGES (INCLUDING, BUT NOT LIMITED TO, PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES; LOSS OF USE, DATA, OR PROFITS; OR BUSINESS INTERRUPTION) HOWEVER CAUSED AND ON ANY THEORY OF LIABILITY, WHETHER IN CONTRACT, STRICT LIABILITY, OR TORT (INCLUDING NEGLIGENCE OR OTHERWISE) ARISING IN ANY WAY OUT OF THE USE OF THIS SOFTWARE, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGE.

Loki Library

Copyright © 2001 by Andrei Alexandrescu. This code accompanies the book:

Alexandrescu, Andrei. "Modern C++ Design: Generic Programming and Design Patterns Applied." Copyright © 2001 Addison-Wesley. Permission to use, copy, modify, distribute and sell this software for any purpose is hereby granted without fee, provided that the above copyright notice appear in all copies and that both that copyright notice and this permission notice appear in supporting documentation.

Helma Project

Copyright © 1999-2004 Helma Project. All rights reserved.

THIS SOFTWARE IS PROVIDED "AS IS" AND ANY EXPRESSED OR IMPLIED WARRANTIES, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE ARE DISCLAIMED. IN NO EVENT SHALL THE HELMA PROJECT OR ITS CONTRIBUTORS BE LIABLE FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, EXEMPLARY, OR CONSEQUENTIAL DAMAGES (INCLUDING, BUT NOT LIMITED TO, PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES; LOSS OF USE, DATA, OR PROFITS; OR BUSINESS INTERRUPTION) HOWEVER CAUSED AND ON ANY THEORY OF LIABILITY, WHETHER IN CONTRACT, STRICT LIABILITY, OR TORT (INCLUDING NEGLIGENCE OR OTHERWISE) ARISING IN ANY WAY OUT OF THE USE OF THIS SOFTWARE, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGE.

Helma includes third party software released under different specific license terms. See the licenses directory in the Helma distribution for a list of these license.

Sarissa

Copyright © 2004 Manos Batsis.

This library is free software; you can redistribute it and/or modify it under the terms of the GNU Lesser General Public License as published by the Free Software Foundation; either version 2.1 of the License, or (at your option) any later version.

This library is distributed in the hope that it will be useful, but WITHOUT ANY WARRANTY; without even the implied warranty of MERCHANTABILITY or FITNESS FOR A PARTICULAR PURPOSE. See the GNU Lesser General Public License for more details.

You should have received a copy of the GNU Lesser General Public License along with this library; if not, write to the Free Software Foundation, Inc., 59 Temple Place, Suite 330, Boston, MA 02111-1307 USA.

Contents

General Preface

About This PeopleBook Preface xi

PeopleSoft Application Prerequisites xi

PeopleSoft Application Fundamentals xi

Documentation Updates and Printed Documentation xii

Obtaining Documentation Updates xii

Ordering Printed Documentation xii

Additional Resources xiii

Typographical Conventions and Visual Cues xiv

Typographical Conventions xiv

Visual Cues xv

Country, Region, and Industry Identifiers xvi

Currency Codes xvi

Comments and Suggestions xvi

Common Elements Used in PeopleBooks xvii

Preface

PeopleSoft Enterprise Human Resources Monitor Health and Safety Preface xix

PeopleSoft Products xix

PeopleSoft Enterprise HRMS Application Fundamentals xix

PeopleBook Structure xix

Chapter 1

Getting Started with Monitor Health and Safety 1

Monitor Health and Safety Overview 1

Monitor Health and Safety Business Processes 1

Monitor Health and Safety Integrations 2

Monitor Health and Safety Implementation 2

Chapter 2

Setting Up Incident, Injury, and Illness Tracking 5

Understanding Incident, Injury, and Illness Tracking 5

Defining Injuries and Illnesses 5

Understanding Injury and Illness Setup....6
Pages Used to Define Injuries and Illnesses....6
Entering Types of Occupational Illnesses....8
Defining Medical Diagnoses....9
Defining Dangerous Occurrences and Hazardous Conditions....10
Pages Used to Define Dangerous Occurrences and Hazards....11
Defining Dangerous Occurrences....11
Defining Hazardous Conditions and Materials....12
Tracking Hazards by Job Code....13
Tracking Hazards by Location....13
Defining Work-Related Incident Details....14
Understanding Work-Related Incident Details....14
Pages Used to Define Related Incident Details....15
Identifying Animals....15
Identifying Modes of Transportation....15
(IND) Setting Up Disablement Types....16
Page Used to Set Up Disablement Types....16
Defining Disablement Types....16
Defining Medical Services Information....17
Pages Used to Define Medical Services Information....18
Entering Physician Information....18
Defining Work Restrictions and Modified Work Duties....19
Pages Used to Define Work Restrictions and Duties....20

Chapter 3
Defining Additional Tables for Global Incident Reporting....21
(AUS) Managing Claims Threshold Details....21
Pages Used to Establish Claims Thresholds....22
Establishing Claims by State....22
(CAN) Setting Up Canadian Workers' Compensation Board (WCB) Reporting....24
Setup Steps for WCB Reporting....24
Pages Used to Set Up WCB Reporting....25
Identifying Classes and Subclasses for Business Locations....25
Setting Up Standard Occupational Classifications....25
Defining Contributing Factor Types....26
Identifying Preventative Action Types....26
(DEU) Setting Up for Employers' Liability Insurance Association Reporting....27
Pages Used to Set Up Employers' Liability Insurance Association Reporting....27
Identifying Health and Safety Officials....29

Setting Up a Social Insurance Unit ID....29
Defining Corrective Actions....30
Defining Disease Types....30
Defining Preventative Actions....30
Defining Unsafe Items....30
Setting Up Work Area Classes....30
Setting Up Work Area Categories....30
Setting Up Work Areas....31
Associating Hazard Codes with an Employee....31
(GBR) Setting Up Reporting to the Health and Safety Executive (HSE) in the United Kingdom....31
Page Used to Set Up Reporting to the HSE in the United Kingdom....32
Adding and Updating an External Scheme....32

Chapter 4
Tracking Personal Data for People Involved in Incidents....33
Entering Non-Employee Data....33
Pages Used to Enter Non-Employee Data....34
Adding Non-Employee Names....34
Entering Personal Details for Non-Employees....35
Entering Extra Address Information for Non-Employees....35
Entering Employee Data....37
Pages Used to Enter Employee Data....37
Entering Extra Address Information for Employees....37
Entering Employment Details....39
Maintaining Employee Health Card Information....40
Pages Used to Maintain Employee Health Cards....41
Recording Employee Health Details....41
Entering Family Details....43
Page Used to Set Up Family Information....43
Entering Family Information....43

Chapter 5
Creating and Tracking Incidents....45
Understanding Health and Safety Incidents....45
New Incident Entry....45
Incident Numbers....45
Incident Reports....46
Entering Health and Safety Incident Details....46

Pages Used to Enter Health and Safety Incidents....46
Adding and Updating Incidents....48
Recording Notification Details....53
Describing Incident Details....54
Recording the Location of an Incident....55
Recording Travel-Related Incidents....58
Entering Additional Travel Route Details....60
Identifying People Connected to an Incident....60
Maintaining Notification Requirements....62
Entering Injury Details....64
Prerequisites....65
Common Elements Used in this Section....65
Pages Used to Enter Injury Details....65
Recording Work-Related Injuries....67
Entering Injury and Illness Descriptions....70
Documenting Injury Statements....72
Entering Injury and Illness Details....73
Entering Medical Treatment Information....75
Recording Diagnoses Details....78
Recording Work-Related Incidents....81
(CAN) Entering Long Term Earnings....86
Tracking Reporting Details....86
Entering Incident Data for Vehicles and Equipment....90
Pages Used to Enter Incident Data for Vehicles and Equipment....90
Entering Incident Data for Vehicles and Equipment....91
Tracking Consequent Actions of Incidents....92
Methods of Documenting Consequent Actions....92
Pages Used to Track Incident Consequent Actions....92
Entering Corrective Actions....92
Entering Preventative Actions....94
Tracking Incident, Injury, and Illness Data by Individual....95
Prerequisites....95
Pages Used to Summarize Employee Injuries....95
Viewing Employee Injury Summaries....95
(GBR) Collecting RIDDOR Data for UK reports....96
Understanding the Collect RIDDOR Data Process....96
Page Used to Run the Collect RIDDOR Data Process....96
(MEX) Defining Mixed Committees for Mexico....96
Understanding Mixed Committees for Health and Safety....97
Page Used to Define Mixed Committees....97

Defining Mixed Committees.....97

Chapter 6
Processing Rehabilitation, Claims, and Examination Data.....101
Managing Claims.....101
Understanding Claims Management.....101
Pages Used to Manage Claims.....102
Opening Claims.....102
Entering Claim Details.....105
Tracking Claim Charges.....105
Entering Claims Payment Information.....106
Entering Provider Reference Data.....107
Tracking Rehabilitation Plans.....109
Pages Used to Track Rehabilitation Plans.....110
Associating an Incident.....110
Monitoring Work Restrictions and Duties.....111
Tracking Rehabilitation Action Details.....112
Tracking Employee Medical Exam Results.....113
Common Elements Used in Tracking Medical Exam Results.....113
Pages Used to Track Medical Exam Results.....114
Entering Physical Examination Information.....115
Entering Physical Exam Results.....117
Entering Hearing Exam Details.....119
Entering Eye Exam Details.....119
Entering Respiratory Exam Details.....120
Setting Up Drug Testing Information.....121
Entering Test Results and Referrals.....122

Chapter 7
(CAN) Preparing to Report to the Workers Compensation Board.....125
Understanding the British Columbia Workers' Compensation Board Electronic Reporting System.....125
Processing Data for British Columbia Workers' Compensation Board Electronic Data Interface Reporting.....127
Preparatory Steps for Report Transmission.....127
Pages Used to Process Data for BC WCB EDI Reporting.....128
Entering Data for BC WCB Reporting.....128
Creating an EDI File for BC WCB Reporting.....128

Chapter 8
(DEU) Monitoring Additional Health and Safety Incident, Injury, and Illness Data For German Employers.....131
Understanding Incident, Injury, and Illness Data for German Employers.....131
Reviewing German Employee Checklist Data.....131
Prerequisites.....132
Page Used to Update Medical Exam Information.....132
Updating Medical Exam Information.....132
Tracking Illnesses for German Employees.....132
Pages Used to Track Illnesses.....133
Establishing an Illness Profile.....133
Describing Employee Circumstances.....135
Entering Information About Job-Related Illnesses.....135
Entering Compensation and Insurance Information.....136
Entering Medical Details.....137
Entering Corrective Actions.....139
Entering Preventative Actions.....140
Entering Case Officer Information for German Employees.....140
Page Used to Assign Case Officers.....140
Assigning Case Officers.....140
Collecting Data for German Reports.....141
Page Used to Collect Data for the Illness Report.....141

Glossary of PeopleSoft Terms.....143

Index 165

About This PeopleBook Preface

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

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Documentation updates and printed documentation.
- Additional resources.
- Typographical conventions and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

Note. PeopleBooks document only page elements, such as fields and check boxes, 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.

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

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft menus, and pages, forms, or windows. 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 applications.

Note. Application fundamentals PeopleBooks are not applicable to the PeopleTools product.

For some applications, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Most PeopleSoft product lines have a version of the application fundamentals PeopleBook. The preface of each PeopleBook identifies the application fundamentals PeopleBooks that are associated with that PeopleBook.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across one or more product lines. 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 the appropriate application fundamentals PeopleBooks. They provide the starting points for fundamental implementation tasks.

Documentation Updates and Printed 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, https://www.peoplesoft.com/corp/en/login.jsp

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 PeopleBooks Press website under the Ordering PeopleBooks topic. The PeopleBooks Press website is a joint venture between PeopleSoft and MMA Partners, the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

Telephone

Contact MMA Partners at 877 588 2525.

Email

Send email to MMA Partners at peoplebookspress@mmapartner.com.

See Also

PeopleSoft Customer Connection, https://www.peoplesoft.com/corp/en/login.jsp

Additional Resources

The following resources are located on the PeopleSoft Customer Connection website:

Resource	Navigation
Application maintenance information	Updates + Fixes
Business process diagrams	Support, Documentation, Business Process Maps
Interactive Services Repository	Interactive Services Repository
Hardware and software requirements	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation & Software, Hardware and Software Requirements
Installation guides	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation & Software, Installation Guides and Notes
Integration information	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software, Pre-built Integrations for PeopleSoft Enterprise and PeopleSoft EnterpriseOne Applications
Minimum technical requirements (MTRs) (EnterpriseOne only)	Implement, Optimize + Upgrade, Implementation Guide, Supported Platforms
PeopleBook documentation updates	Support, Documentation, Documentation Updates
PeopleSoft support policy	Support, Support Policy
Prerelease notes	Support, Documentation, Documentation Updates, Category, Prerelease Notes
Product release roadmap	Support, Roadmaps + Schedules
Release notes	Support, Documentation, Documentation Updates, Category, Release Notes

Resource	Navigation
Release value proposition	Support, Documentation, Documentation Updates, Category, Release Value Proposition
Statement of direction	Support, Documentation, Documentation Updates, Category, Statement of Direction
Troubleshooting information	Support, Troubleshooting
Upgrade documentation	Support, Documentation, Upgrade Documentation and Scripts

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.
- Country, region, and industry identifiers.
- Currency codes.

Typographical Conventions

This table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
Italics	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 letter *O*.
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 the W key.
`Monospace font`	Indicates a PeopleCode program or other code example.

Typographical Convention or Visual Cue	Description
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.
. . . (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.

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.

If the note is preceded by *Important!,* the note 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.

Cross-References

PeopleBooks provide cross-references either under the heading “See Also” or on a separate line preceded by the word *See.* Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Country, Region, and Industry Identifiers

Information that applies only to a specific country, region, or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a country-specific heading: "(FRA) Hiring an Employee"

Example of a region-specific heading: "(Latin America) Setting Up Depreciation"

Country Identifiers

Countries are identified with the International Organization for Standardization (ISO) country code.

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in PeopleBooks:

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in PeopleBooks:

- USF (U.S. Federal)
- E&G (Education and Government)

Currency Codes

Monetary amounts are identified by the ISO currency code.

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 Used in 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.
Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
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).
Request ID	An ID that represents a set of selection criteria for a report or process.
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.
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.
User ID	An ID that represents the person who generates a transaction.

PeopleSoft Enterprise Human Resources Monitor Health and Safety Preface

This preface discusses:

- PeopleSoft products.
- PeopleSoft Enterprise HRMS Application Fundamentals.
- PeopleBook structure.

PeopleSoft Products

This PeopleBook refers to the following PeopleSoft product: PeopleSoft Enterprise Human Resources Monitor Health and Safety.

PeopleSoft Enterprise HRMS Application Fundamentals

Additional, essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook*. Each PeopleSoft product line has its own version of this documentation.

Note. One or more pages in Monitor Health and Safety operate in deferred processing mode. Deferred processing is described in the preface in the *PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook.*

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "PeopleSoft Enterprise HRMS 8.9 Application Fundamentals Preface"

PeopleBook Structure

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

The PeopleBooks structure conveys a task-based hierarchy of information. Each chapter describes a process that is required to set up or use the application. Chapter sections describe each task in the process. Subsections within a section describe a single step in the process task.

Some PeopleBooks may also be divided into parts. PeopleBook parts can group together similar implementation or business process chapters within an application or group together two or more applications that integrate into one overall business solution. When a book is divided into parts, each part is divided into chapters.

The following table provides the order and descriptions of chapters in a PeopleBook:

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 used in the PeopleBook, if necessary.
Getting Started With…	This chapter discusses product implementation guidelines. It explains: • The business processes documented within the book. • Integrations between the product and other products. • A high-level documentation to how our documentation maps to the overall implementation process; it doesn't offer step-by-step guidance on how to perform an actual implementation.
Navigation	(Optional) Some PeopleSoft applications provide custom navigation pages that contain groupings of folders that support a specific business process, task, or user role. When an application contains custom navigation pages, this chapter provides basic navigation information for these pages. **Note.** Not all applications have delivered custom navigation pages.
Understanding…	(Optional) This is an introductory chapter that broadly explains the product and the functionality within the product.

Chapters	Description
Setup and Implementation	This can be one or more chapters. These chapters contain documentation to assist you in setting up and implementing the product. For example, if functionality X is part of a product, 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.
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 a product, 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.
Delivered Workflow Appendix	(Optional) The delivered workflow appendix describes all of the workflows that are delivered for the application. **Note.** Not all applications have delivered workflows.
Reports Appendix	(Optional) This appendix contains an abbreviated list of all of the product'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 Monitor Health and Safety

This chapter provides an overview of Monitor Health and Safety and discusses:

- Monitor Health and Safety business processes.
- Monitor Health and Safety integrations.
- Monitor Health and Safety implementation.

Monitor Health and Safety Overview

Monitor Health and Safety enables you to record and track incidents, injuries, illnesses, and dangerous occurrences at the workplace. In addition to tracking incidents for employees, you can also record and track non-employees — employees who were witnesses but who were not actually injured. Using Monitor Health and Safety, you can submit and process medical and examination data to the appropriate reporting agencies.

Monitor Health and Safety Business Processes

Monitor Health and Safety supports 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.
- (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.

Monitor Health and Safety Integrations

Monitor Health and Safety integrates with all the PeopleSoft Enterprise Human Resource Management Systems (HRMS) applications, with other PeopleSoft applications, and with third-party applications.

Human Resources shared tables are available to many 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 Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Getting Started with PeopleSoft Enterprise HRMS"

Monitor Health and Safety Implementation

PeopleSoft Setup Manager enables you to review a list of setup tasks for your organization for the products that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding PeopleBook documentation.

Monitor Health and Safety provides component interfaces to help you load data from your existing system into PeopleSoft tables. Use the Excel to Component Interface utility with the component interfaces to populate the tables.

This table lists all of the components that have setup component interfaces:

Component	Component Interface	References
JOBCODE_HAZRDS_TBL	JOBCODE_HAZRDS_TBL	See Chapter 2, "Setting Up Incident, Injury, and Illness Tracking," Tracking Hazards by Job Code, page 13.
LOCATN_HAZRDS_TBL	LOCATN_HAZRDS_TBL	See Chapter 2, "Setting Up Incident, Injury, and Illness Tracking," Tracking Hazards by Location, page 13.
DIAGNOSIS_TABLE	DIAGNOSIS_TABLE	See Chapter 2, "Setting Up Incident, Injury, and Illness Tracking," Defining Medical Diagnoses, page 9.
HS_OCC_ILLNESS	HS_OCC_ILLNESS	See Chapter 2, "Setting Up Incident, Injury, and Illness Tracking," Entering Types of Occupational Illnesses, page 8.
ACCIDN_TYPE_TBL	ACCIDN_TYPE_TBL	See Chapter 2, "Setting Up Incident, Injury, and Illness Tracking," Defining Injuries and Illnesses, page 5.
INJURY_NATURE_TBL	INJURY_NATURE_TBL	See Chapter 2, "Setting Up Incident, Injury, and Illness Tracking," Defining Injuries and Illnesses, page 5.

Component	Component Interface	References
INJURY_SOURCE_TBL	INJURY_SOURCE_TBL	See Chapter 2, "Setting Up Incident, Injury, and Illness Tracking," Defining Injuries and Illnesses, page 5.
HS_TRANSPORT_TBL	HS_TRANSPORT_TBL	See Chapter 2, "Setting Up Incident, Injury, and Illness Tracking," Identifying Modes of Transportation, page 15.

Other Sources of Information

In the planning phase of the implementation, take advantage of all PeopleSoft sources of information, including the installation guides, table-loading sequences, data models, and business process maps. A complete list of these resources appears in the preface in the *PeopleSoft HRMS Application Fundamentals 8.9 PeopleBook* with information about where to find the most current version of each.

See Also

PeopleSoft Setup Manager for PeopleSoft Enterprise HRMS and Campus Solutions 8.9 PeopleBook

PeopleSoft Enterprise PeopleTools PeopleBook: PeopleSoft Component Interfaces

CHAPTER 2

Setting Up Incident, Injury, and Illness Tracking

This chapter provides an overview incident, injury, and illness tracking and discusses how to:

- Define injuries and illnesses.
- Define dangerous occurrences and hazards.
- Define work-related incident details.
- (IND) Set up disablement types.
- Define medical service information.
- Define work restrictions.

Understanding Incident, Injury, and Illness Tracking

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

Use Monitor Health and Safety to track information specific to health and safety incidents, 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, enter effective dates that are before the effective dates of any incidents that you enter. Otherwise, all the valid codes do not appear in prompt lists on the Monitor Health and Safety pages.

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Getting Started with PeopleSoft Enterprise HRMS"

Defining Injuries and Illnesses

To define injury, illness, and accident codes, use the Accident Type Table (ACCIDN_TYPE_TBL), Body Part Table (BODY_PART_TABLE), Injury Nature Table (INJURY_NATURE_TBL), Source of Injury Table (INJURY_SOURCE_TABLE), Unsafe Act Table (UNSAFE_ACT_TBL), Occupational Illness Table (HS_OCC_ILLNESS_TBL), Occupational Illness Table France (OCC_ILLNESS), Diagnosis Table (DIAGNOSIS_TABLE), Allergy Table (HS_ALLERGY_TBL), Immunization Table (HS_IMMUN_TBL), Medication Table (HS_MEDCATN_TBL), and Medicare Table Australia (HS_MEDCARE_TBL_AUS) components.

This section provides guidelines for setting up injury, illness, and accident codes that are required by government reporting agencies and discusses how to:

- Enter types of occupational illnesses.
- Define medical diagnoses.

Understanding Injury and Illness Setup

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 establish new ones. Use the codes required by local authorities in a 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

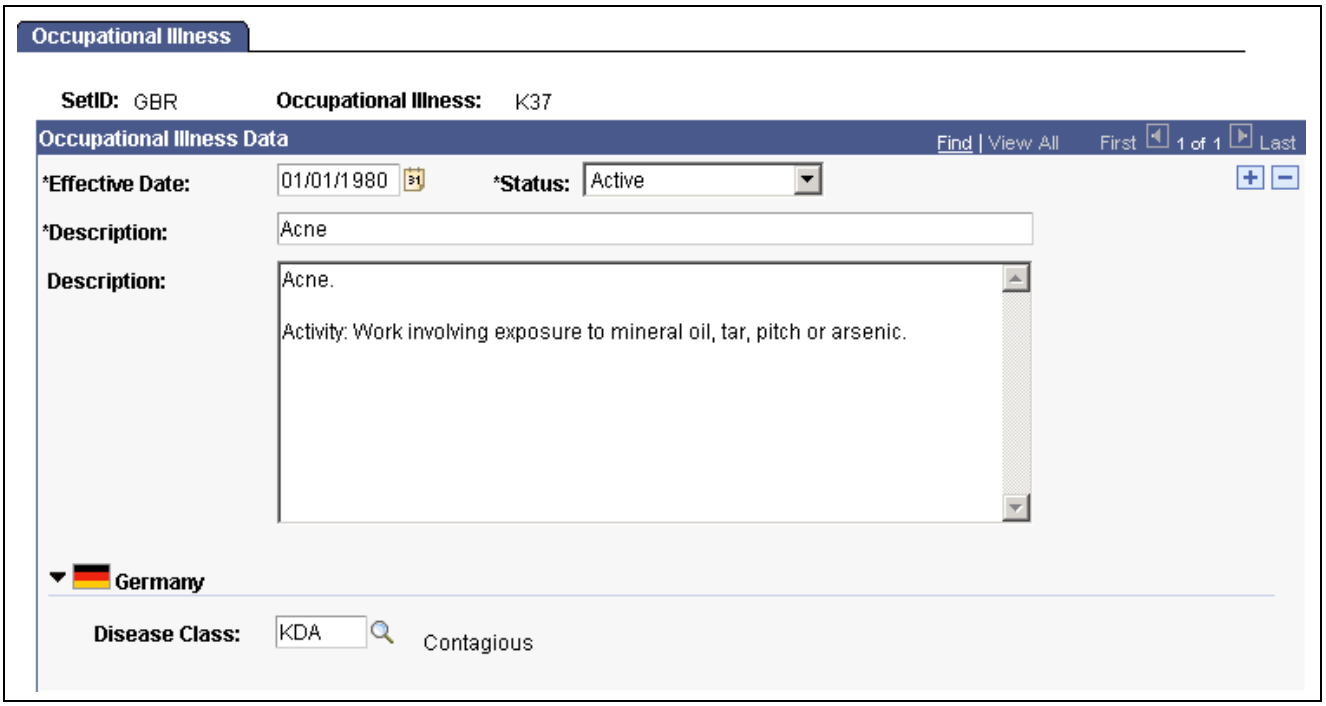
Page Name	Object Name	Navigation	Usage
Accident Type Table	ACCIDENT_TYPE_TBL	• Set Up HRMS, Product Related, Workforce Monitoring, Health and Safety, Accident Type Table • Workforce Monitoring, Health and Safety, Define Accident/Injury Info, Accident Types	Describe the events that can result in physical occupational injuries. Use the Accident Type codes that are used on the Injury Details page, standard codes, or 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 body parts that are subject to injury and associate each with a class. For example, specify the *Jaw* as part of the class *Face.*
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	Identify types of physical injuries. These codes are used in the Incident Details component.

Page Name	Object Name	Navigation	Usage
Source of Injury Table	INJURY_SOURCE_TBL	• Set Up HRMS, Product Related, Workforce Monitoring, Health and Safety, Source of Injury Table, Source of Injury Table • Workforce Monitoring, Health and Safety, Define Accident/Injury Info, Source of Injury, Source of Injury	Identify potential sources or causes of injury. These codes are used in the Injury Details page.
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 Acts	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	Define 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 • Workforce Monitoring, Health and Safety, Define Medical Data, Allergy	Define allergy types.

Page Name	Object Name	Navigation	Usage
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.
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 Table page.



Occupational Illness Table page

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

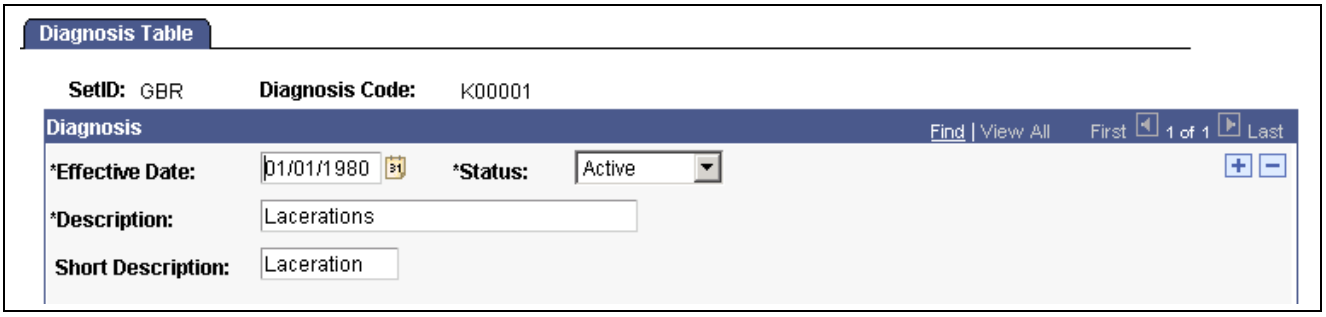
(DEU) Germany

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.



Diagnosis Table page

If the organization tracks workplace accommodations for employees with disabilities, then you also use the diagnosis codes that you enter here when you work with the Accommodation Data component, that is part of the various Workforce Monitoring menus.

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

(USA) If the organization is implementing the Americans with Disabilities Act (ADA) feature of Human Resources, use the Diagnosis Table to enter medical diagnoses for disabilities as well, and this page appears 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

To define dangerous occurrences and hazardous conditions, use the Dangerous Occurrences Table (HS_DANGER_OCC), Hazardous Conditions/Materials (HAZ_CON_MATRL_TBL), Job Code Hazards Table (JOBCODE_HAZRDS_TBL), Location Hazards Table (LOCATN_HAZRDS_TBL) components.

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 pages that are listed 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.

This section discusses how to:

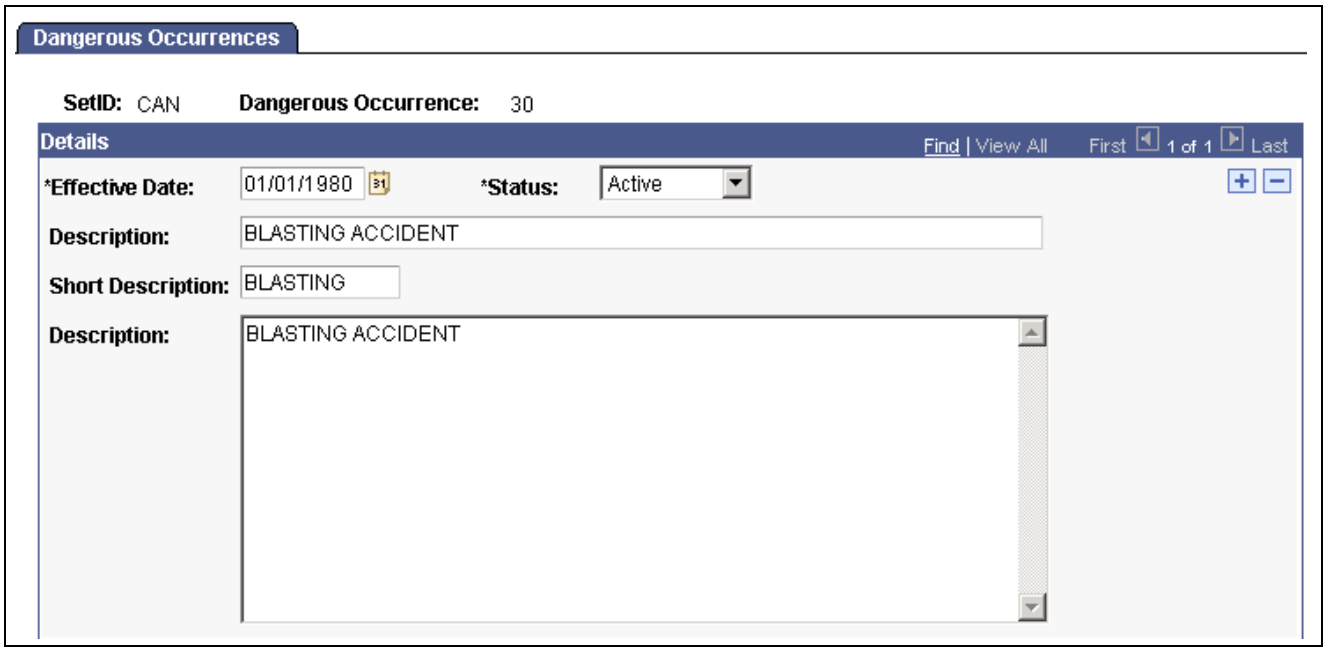
- Define dangerous occurrences.
- Define hazardous conditions and materials.
- Track hazards by job code.
- Track hazards by location.

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	Define types of dangerous occurrences or specify those that are defined by the regulatory authority in the regulatory region. Use the codes that you define when you create a health and safety incident, using the Incident Details - Description page.
Haz Condition/Materials Table (Hazardous 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	Define codes for physical conditions and hazardous materials that might directly contribute to occupational accidents, injuries, or illnesses. The codes that you define are used on the Corrective Actions and Preventive Actions pages.
Job Code Hazards Table	JOBCODE_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 exposure to hazards 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 to hazards that have occurred at specific locations in the organization.

Defining Dangerous Occurrences

Access the Dangerous Occurrences page.

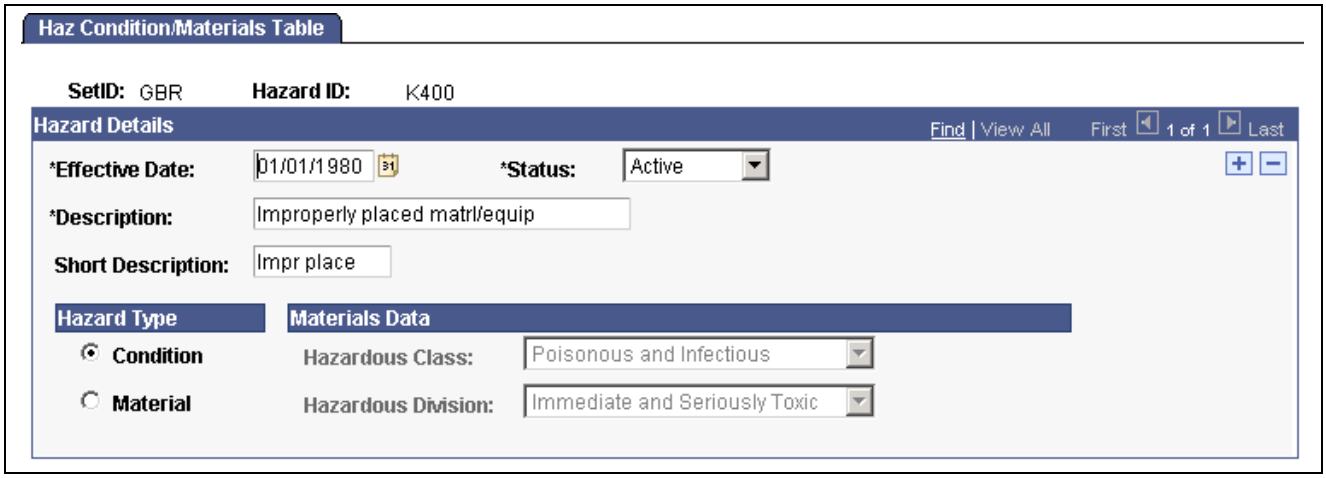


Dangerous Occurrences page

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.



Hazardous Condition/Material Table page

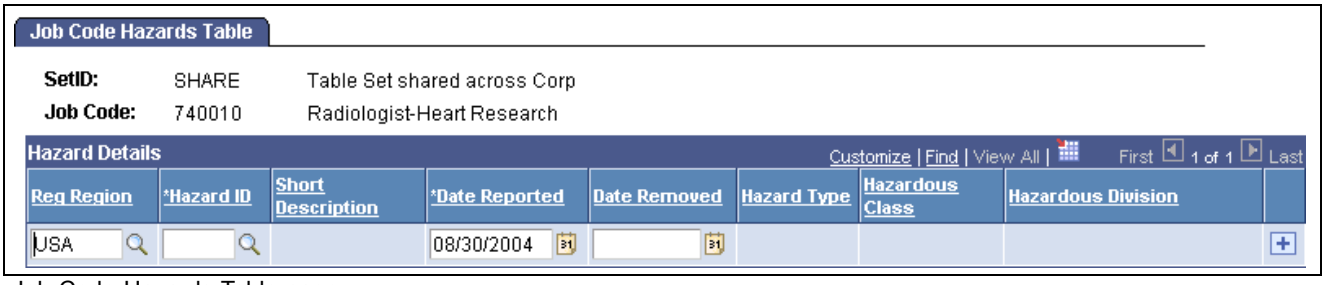
Hazard ID You can enter multiple hazard IDs for each setID and maintain different sets of hazard IDs for specific regulatory regions.

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 specify the hazardous class and 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 Job Code

Access the Job Code Hazards Table page.



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.

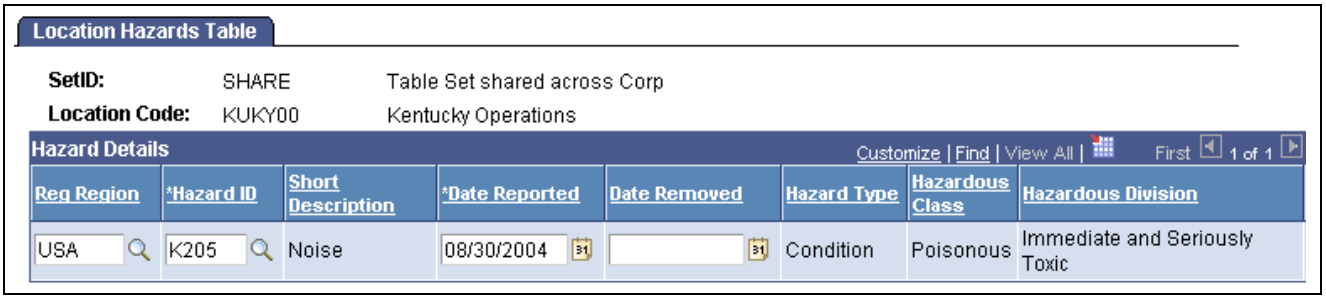
Date Reported This is usually today's date, which you can change.

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 page

Location Code The location code that you entered appears in this field.

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 Work-Related Incident Details

To define related incident details, use the Animal Table (HS_ANIMAL_TBL) and the Transport Table (HS_TRANSPORT_TBL) components.

This section provides an overview of work-related incident details discusses how to:

- Identify animals.
- Identify modes of transportation.

Understanding Work-Related Incident Details

Use the pages that are described 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 (COMPANY_PROP_TBL) component to track health and safety incidents that involve heavy equipment, machinery, and computer and electronic equipment. To access the Company Property Table, select Set Up HRMS, Product Related, Workforce Administration, Company Property. The pages in the Company Property component are used to manage company assets in addition to tracking issues involving company property.

Company Cars

You can link cars that are set up in Company Cars to incidents. If you add a company-owned vehicle, you can also access the registration and descriptive data that is 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 to avoid maintaining different codes for the same car.

See Also

PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce, "Entering Additional Data in Human Resources Records," Handling Company Property

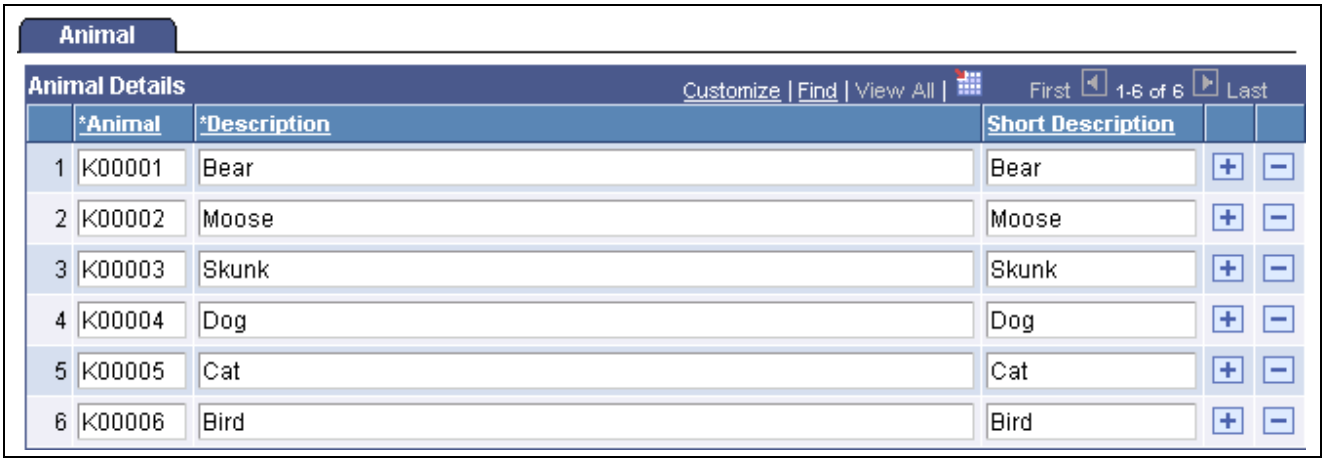
PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Company Cars, "Setting Up Administer Company Cars," Setting Up Company Car Fleet Information

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 employees during incidents that occur during work-related travel. You use Mode of Transport codes on the Incident Details - Travel page.

Identifying Animals

Access the Animal page.

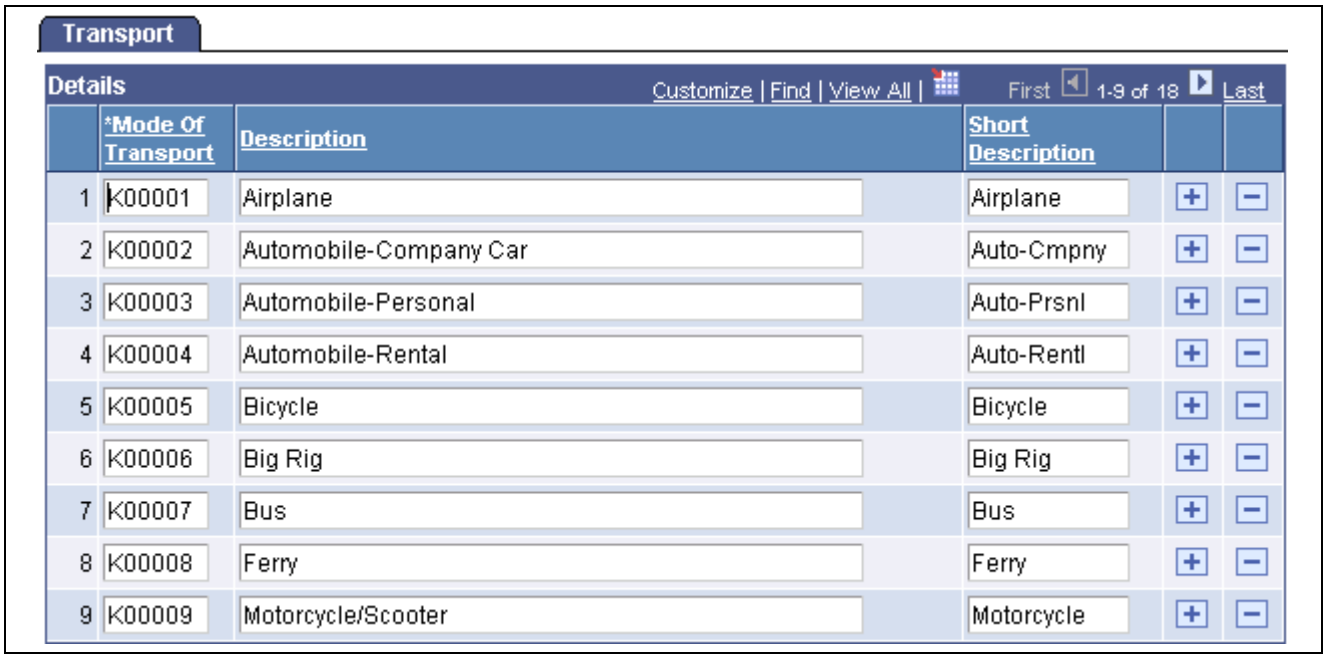


Animal page

Enter a code and corresponding description of each type of animal that you can associate with incidents.

Identifying Modes of Transportation

Access the Transport page.



Transport page

Enter a code and corresponding descriptions for each mode of transport, such as plane, train, car, bus, or taxi or identify transportation companies or services that you can associate with incidents.

(IND) Setting Up Disablement Types

To set up disablement types, use the Disablement Type (HS_DISABL_TYPE_IND) component.

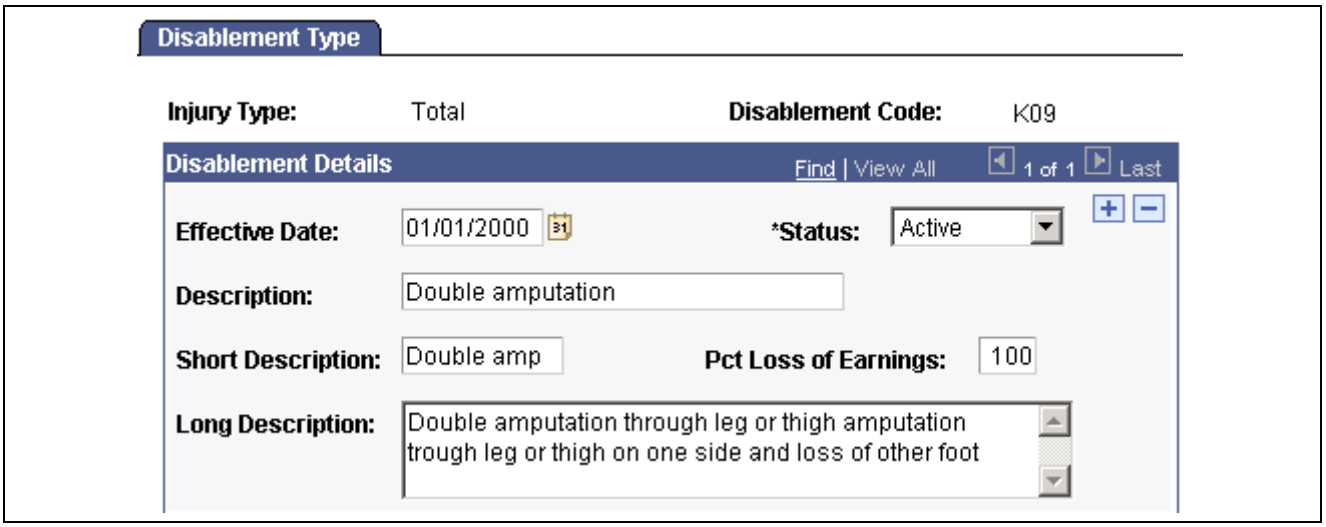
This section discusses how to define the disablement types that you can use to record disability information for employees.

Page Used to Set Up Disablement Types

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

Defining Disablement Types

Access the Disablement Type page.



Disablement Type page

Injury Type Select an injury type: *Partial* or *Total* to access this page. The injury type you selected appears in this field.

Disablement Code The disablement code that you entered to access this page appears in this field.

Pct Loss of Earnings(Percent Loss of Earnings) Enter the percentage of loss of earnings due to the disablement.

Defining Medical Services Information

To define medical services information, use the Medical Facilities Table (HS_MEDICAL_FAC) and the Physician Table (HS_PHYSICIAN_DATA) components.

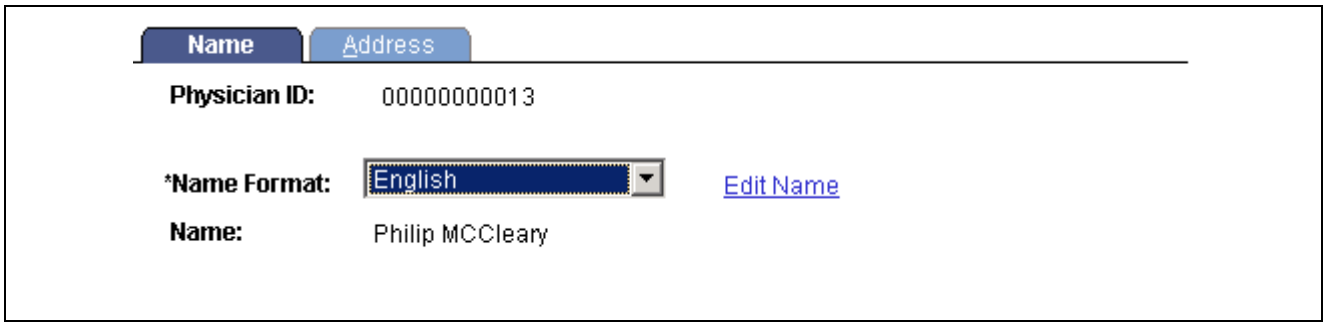
This section discusses how to enter physician information.

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.
Edit Name	NAME_DFT_SEC	Click the Edit Name link on the Physician Table - Name page.	Enter name details such as prefix, first name, last name, and so forth.
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 Physician Information

Access the Physician Table - Name page.



Physician Table - Name page

Physician ID The non-employee ID that is assigned to the physician appears in this field.

If you choose to have the system automatically assign non-employee IDs, it assigns to the physician the number that immediately follows the one in

the Last Non-Employee ID Assigned field in the Installation Table. The number first appears as 00000000000. 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, PeopleSoft recommends that you either always assign numbers manually or always let the system do it.

Name Format Select the country whose name format you want to use for this person. The appropriate fields for the country that you enter appear on the Edit Name page.

Edit Name Click this link to access the Edit Name page on which you enter name details in the appropriate country format.

See Also

Chapter 4, "Tracking Personal Data for People Involved in Incidents," page 33

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Setting Up and Installing PeopleSoft HRMS," Setting Up Implementation Defaults

Defining Work Restrictions and Modified Work Duties

To define work restrictions and modified work duties, use the Work Restrictions Table (WORK_RESTRICT_TBL) and the Modified Work Table (MODIFIED_WORK_TBL) components.

When employees return to work after an injury or illness and are not able to immediately return to their full job duties, you can track rehabilitation plans that are established for them by using the codes that you set up in these tables.

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 3

Defining Additional Tables for Global Incident Reporting

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

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

(AUS) Managing Claims Threshold Details

To manage claims threshold details, use the Claim Info Aus (CLAIM_INFO_CLAIM) component.

Use the Claim Threshold pages to establish claims threshold information by state, union or claim. This information is used to process reimbursable expenses related to health and safety incidents and worker injuries resulting in treatment and lost work time.

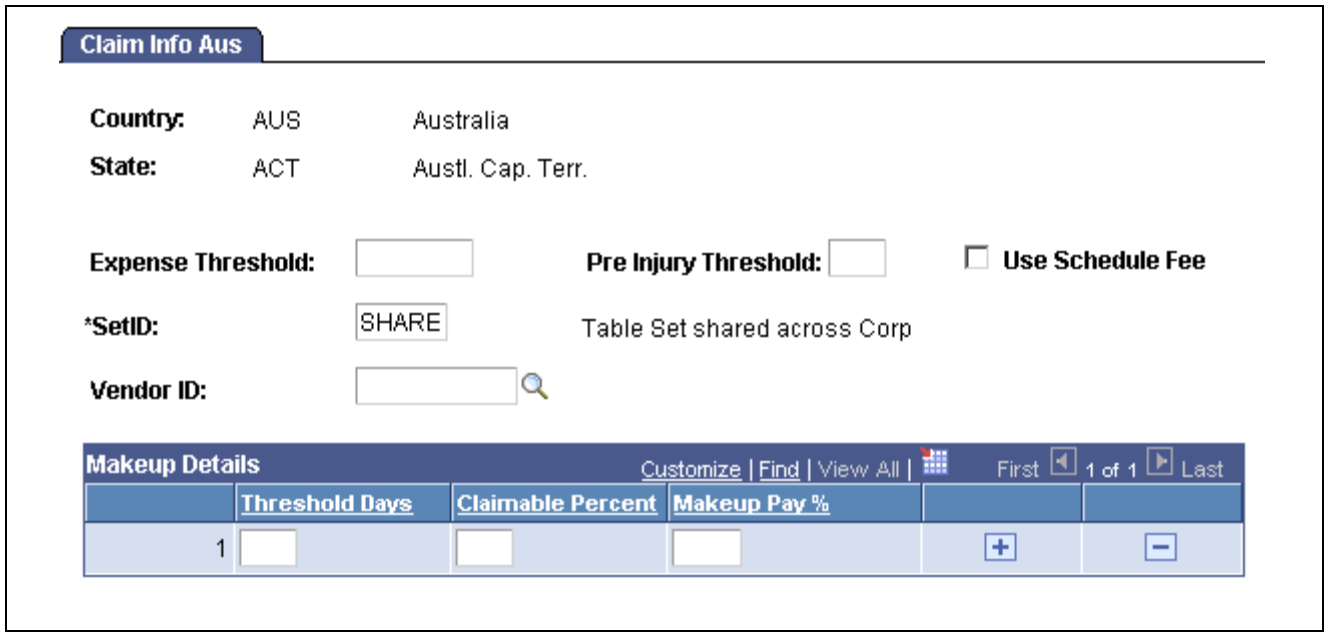
The pages that you use to establish claim thresholds by state, union, and by claim are similar.

Pages Used to Establish Claims Thresholds

Page Name	Object Name	Navigation	Usage
Claim Threshold - State AUS - Claim Info 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	Establish claims threshold information by state.
Claim Threshold - Union AUS - Claim Info 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	Establish claims threshold information by union.
Claim Threshold - Claims AUS - Claim Info 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	Establish claims threshold information for a claim with an approved status. You must have a claim number to access this page. See Chapter 6, "Processing Rehabilitation, Claims, and Examination Data," Managing Claims, page 101.

Establishing Claims by State

Access the Claim Threshold - State AUS - Claim Info Aus page.



Claim Threshold - State AUS - 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 Select to indicate that you 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 the organization's liability for the worker's wages.

Example

Based on *10* Pre Injury Threshold Days before the organization can pass on claims expenses to the insurer, a company pays *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 parameters, you would enter the following values in the Makeup Details group box:

Threshold Days	Claimable Percent	Makeup Pay %
0	0	100
10	95	5

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

To set up Canadian WCB reporting, use the Class/Subclass Table - CAN (HS_CLASS_CAN), Occupational Table - CAN (HS_OCCUPATION_CAN), Contributing Factors - CAN (HS_CONTFAC_CAN), and Preventative Actions Table - CAN (HS_PREVENT_ACT_CAN) components.

This section provides an overview of the setup steps for WCB reporting and discusses how to:

- Identify classes and subclasses for business locations.
- Set up standard occupational classifications.
- Identify preventative action types.

Setup Steps for WCB Reporting

Most of the Canadian features that are needed to set up data for tracking and reporting incidents, injuries, and illnesses to the WCB are 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.

   The organization's occupation codes (job titles, for example) might 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. Use the codes that are industry-specific and approved by the 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 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.

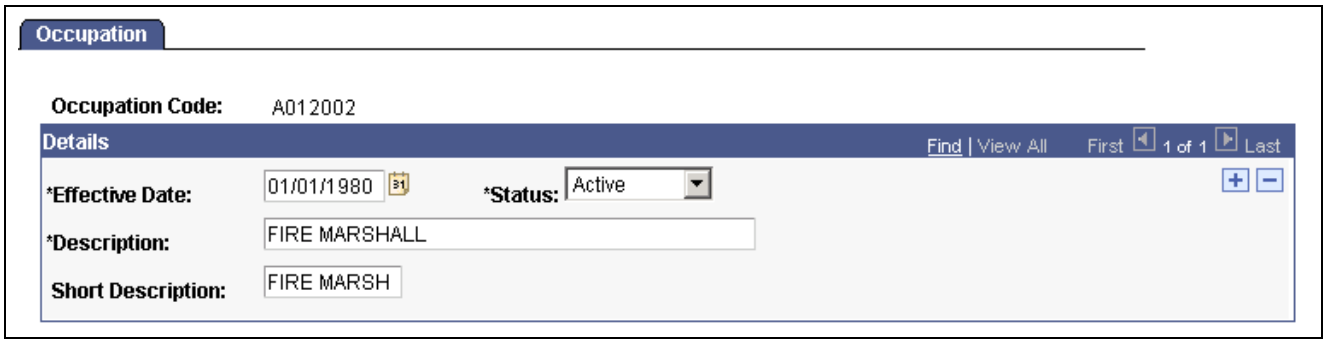
Identifying Classes and Subclasses for Business Locations

Access the Class/Subclass page.

Class/Subclass The Class/Subclass code that you entered to access this page appears in this field. Use this value on the Incident Details - Incident page and the Injury Details - Work Related page.

Setting Up Standard Occupational Classifications

Access the Occupation page.

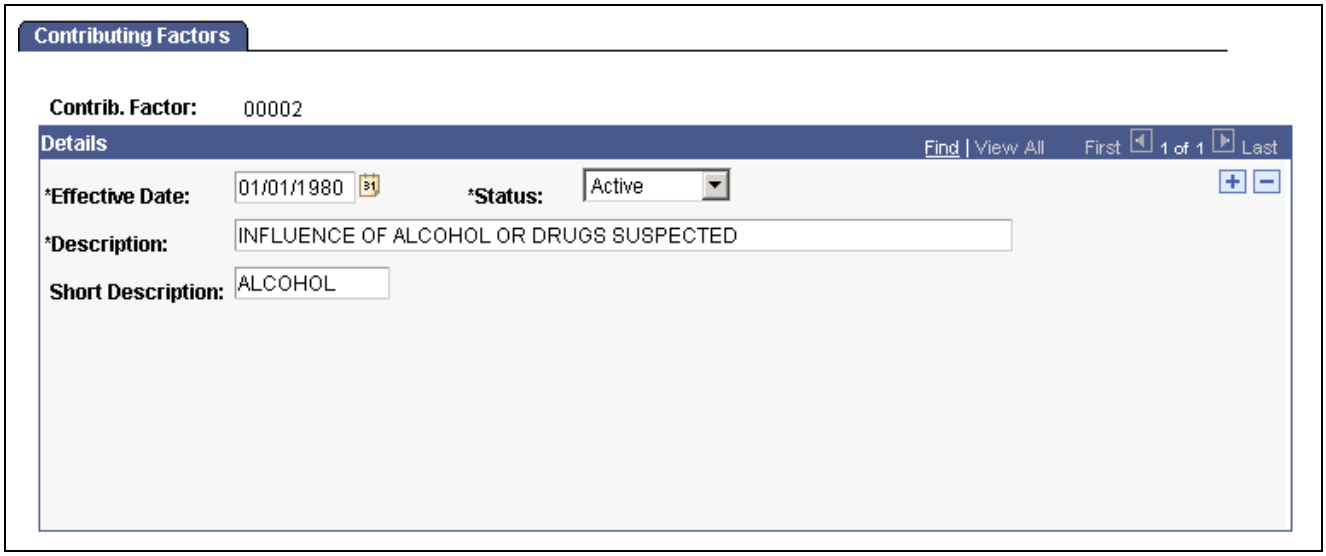


Occupation page

Occupation Code The occupation code that you enter to access this page appear in this field. Use this code on the Employment Details page.

Defining Contributing Factor Types

Access the Contributing Factors page.



Contributing Factors page

Contrib. Factor (contributing factor) The contributing factor code that you entered to access this page appears in this field. Use this code on the Incident Details - Description page.

Identifying Preventative Action Types

Access the Preventative Actions page.

Preventative Action The preventative action code that you entered to access this page appears in this field. Use this code on the Consequent Actions - Preventative page.

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

To set up for employers' liability Insurance Reporting in Germany, use the Case Officer Table DEU (HS_LOC_CASEOFF_GER), Social Insurance Unit (SI_UNIT_GER), Correct. Actions Table DEU (HS_CORRECT_ACT_GER), Disease Class Table DEU (HS_DIS_CLASS_GER), Prevent. Actions Table - GER (HS_PREVENT_ACT_GER), Unsafe Item Table DEU (HS_UNSAFE_ITEM_GER), Work Area Class Table DEU (HS_WA_CLS_TBL_GER), Work Area Table DEU (HS_WA_TBL_GER), Work Area Category Table DEU (HS_WA_CTG_TBL_GER), and Coop Society Data (HS_COOP_SOC_GER) components.

This section discusses how to:

- Identify health and safety officials.
- Set up a social insurance unit ID.
- Define corrective actions.
- Define disease types.
- Define preventative actions.
- Define unsafe items.
- Set up work area classes.
- Set up work area categories.
- Set up work area associations.
- Associate hazard codes with an employee.

You establish the codes that are defined by the employer's liability insurance association for use in tracking and reporting health and safety incidents.

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

Pages Used to Set Up Employers' Liability Insurance Association Reporting

Page Name	Object Name	Navigation	Usage
Case Officers	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 the 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.

Page Name	Object Name	Navigation	Usage
SI Unit (social insurance unit)	SI_UNIT_GER	Set Up HRMS, Product Related, Workforce Administration, Workforce Data DEU, Social Insurance Unit	Set up the 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.
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.

Page Name	Object Name	Navigation	Usage
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.
Coop Society Data	HS_COOP_SOC_GER	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

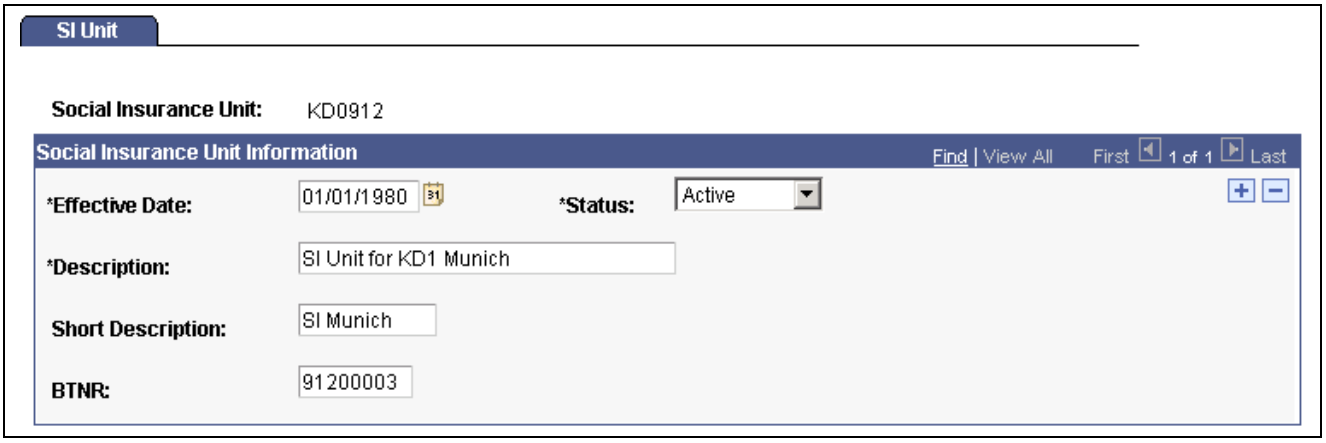
Access the Case Officers page.

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*.

You can assign multiple officer types to a location.

Setting Up a Social Insurance Unit ID

Access the SI Unit (social insurance unit) page.



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 corrective action code that you entered appears in this field. This value 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 disease class code that you entered appears in this field. The disease class 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 preventative action code that you entered appears in this field. 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 unsafe item code that you entered appears in this field. 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 work area class code that you entered appears in this field. 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 work area category code that you entered appears in this field.

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 work area code that you entered appears in this field. 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.You can select from the hazards that were previously entered for this employee's setID and department on the Department Table - Profile page.

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 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

To set up reporting to the HSE in the United Kingdom, use the External Scheme GBR (HS_EXT_SCHEME_UK) component.

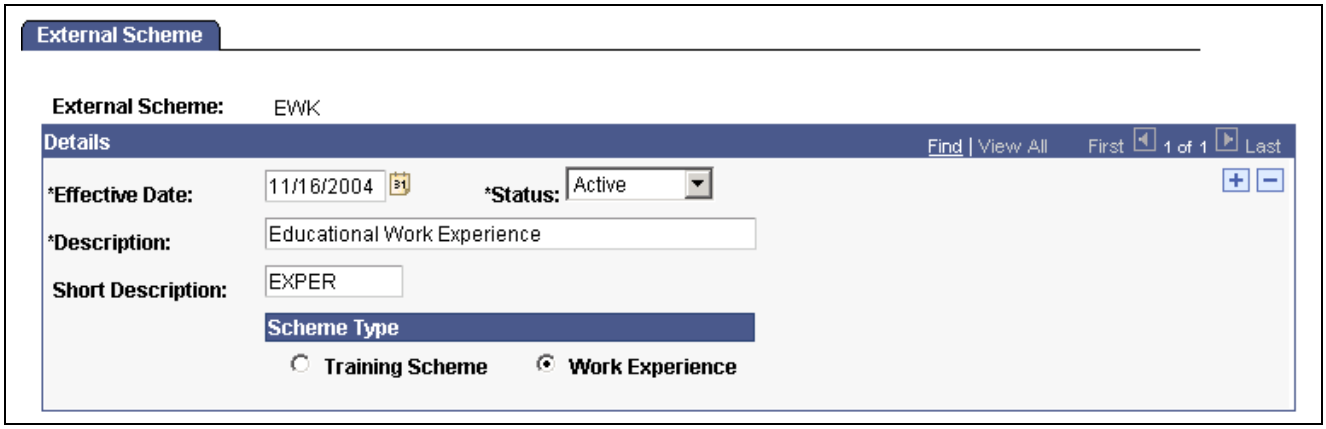
This section describes how to establish the codes that you need to track and report health and safety incidents to the HSE under RIDDOR.

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 page

External Scheme The external scheme code that you entered appears in this field. 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 4

Tracking Personal Data for People Involved in Incidents

This chapter discusses how to:

- Enter non-employee data.
- Enter employee data.
- Maintain 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. You must do this for every person involved in an incident.

Entering Non-Employee Data

This section discusses how to:

- Add non-employee names.
- Enter personal details for non-employees.
- Enter extra address information for non-employees.

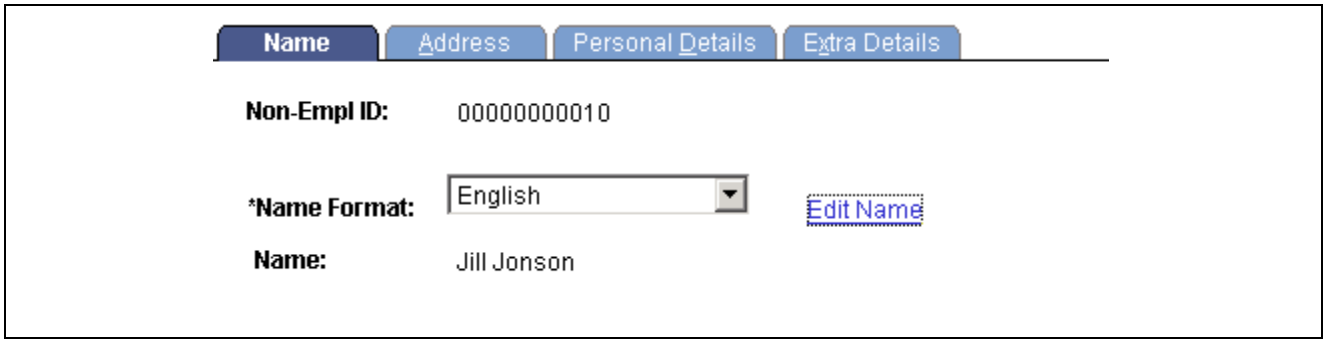
You can enter basic information about non-employees who are involved in health and safety incidents. The system stores the non-employee data that you enter on these pages separately from employee personal data.

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 is required if the individual does not live at a normally recognized address.

Adding Non-Employee Names

Access the Non-Employee - Name page.



Non-Employee - Name page

Non-EmplID (non-employee ID)

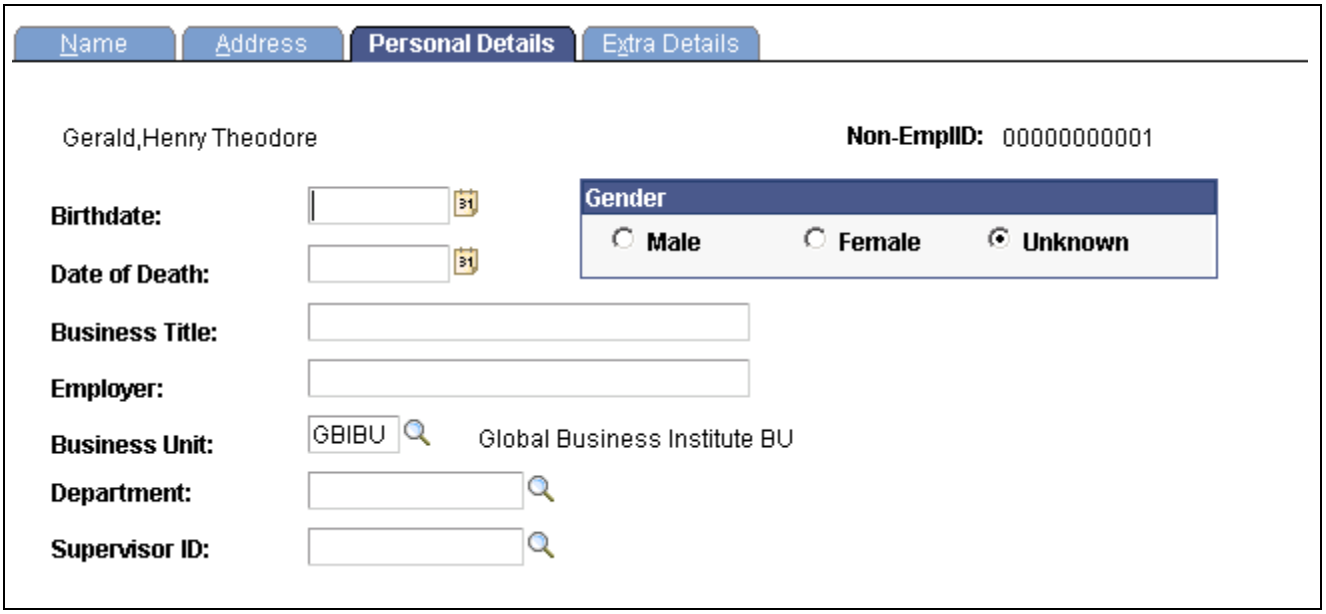
The non-employee ID that you entered appears in this field.

The system automatically assigns the non-employee ID as the number immediately following the one that is 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, PeopleSoft recommends that you either always assign numbers manually or always let the system do it.

Entering Personal Details for Non-Employees

Access the Non-Employee - Personal Details page.



Non-Employee - Personal Details page

Birthdate For reporting purposes, enter the person's birth date.

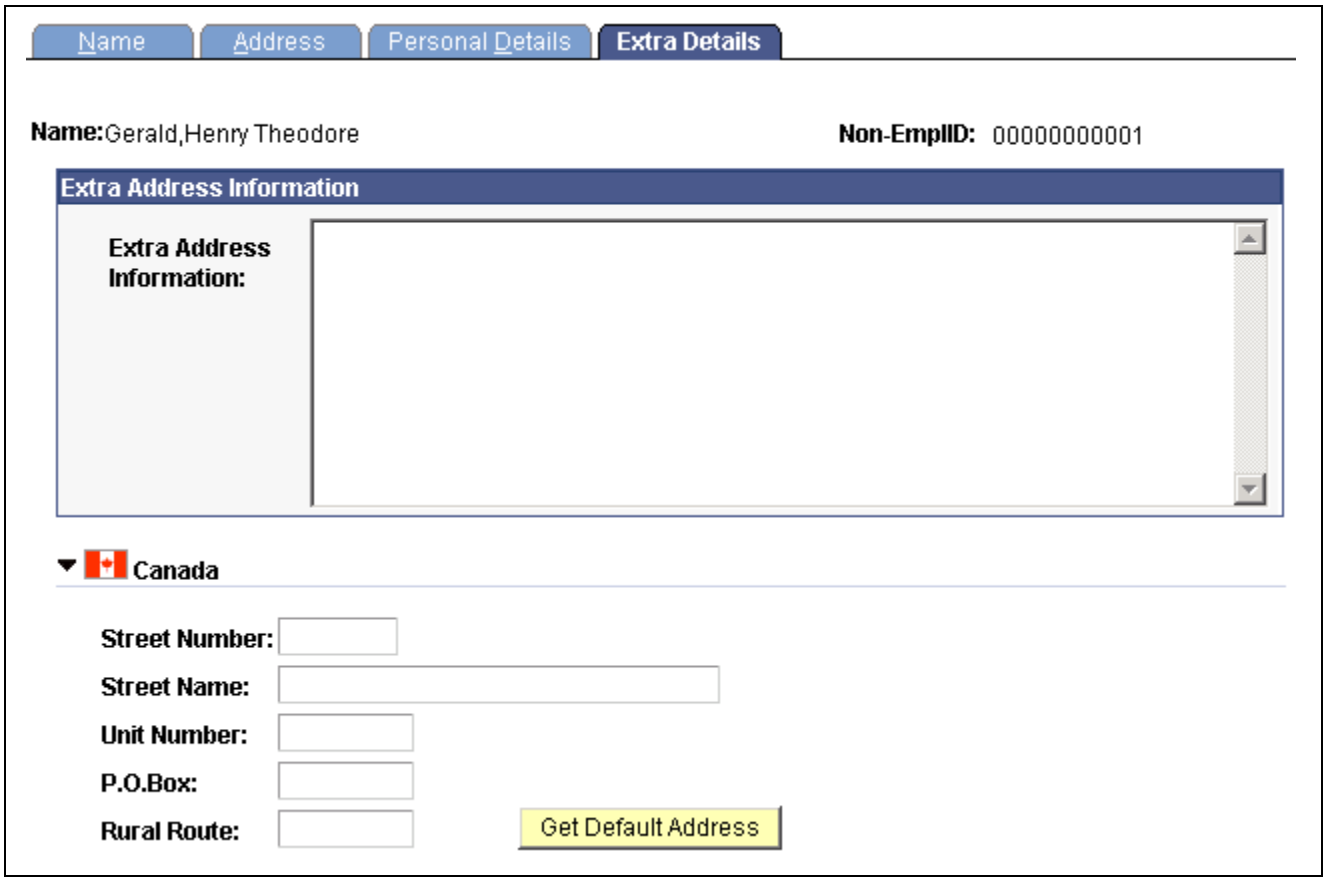
Date of Death If a fatality is involved, enter the date of death.

Business Unit If the person is a temporary or contract worker in the organization, enter a business unit.

Supervisor ID If the person is a temporary or contract worker in the organization, enter a supervisor ID (employee ID).

Entering Extra Address Information for Non-Employees

Access the Non-Employee - Extra Details page.



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 are 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, information on this additional address page is necessary to create the appropriate EDI records. The absence of this information causes the file to fail WCB's mainframe computer editing checks.

Entering Employee Data

This section discusses how to:

- Enter extra address information for employees.
- Enter employment details.

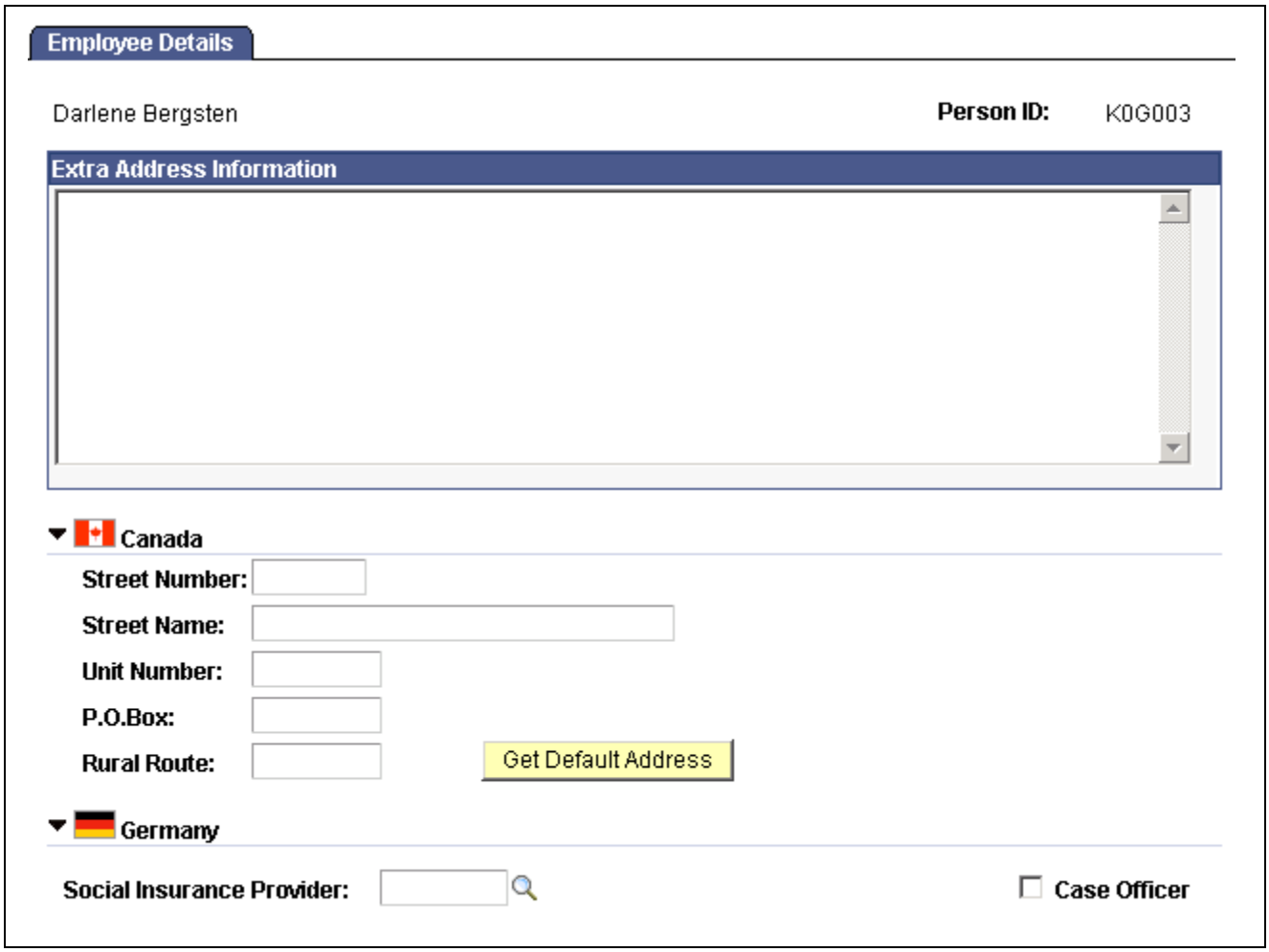
Most of the data that you need for employees is entered into the system during the hiring process. Use the pages here to add additional data.

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 is 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 Canadian and United Kingdom operations who are involved in health and safety incidents.

Entering Extra Address Information for Employees

Access the Employee Details page.



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 are 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

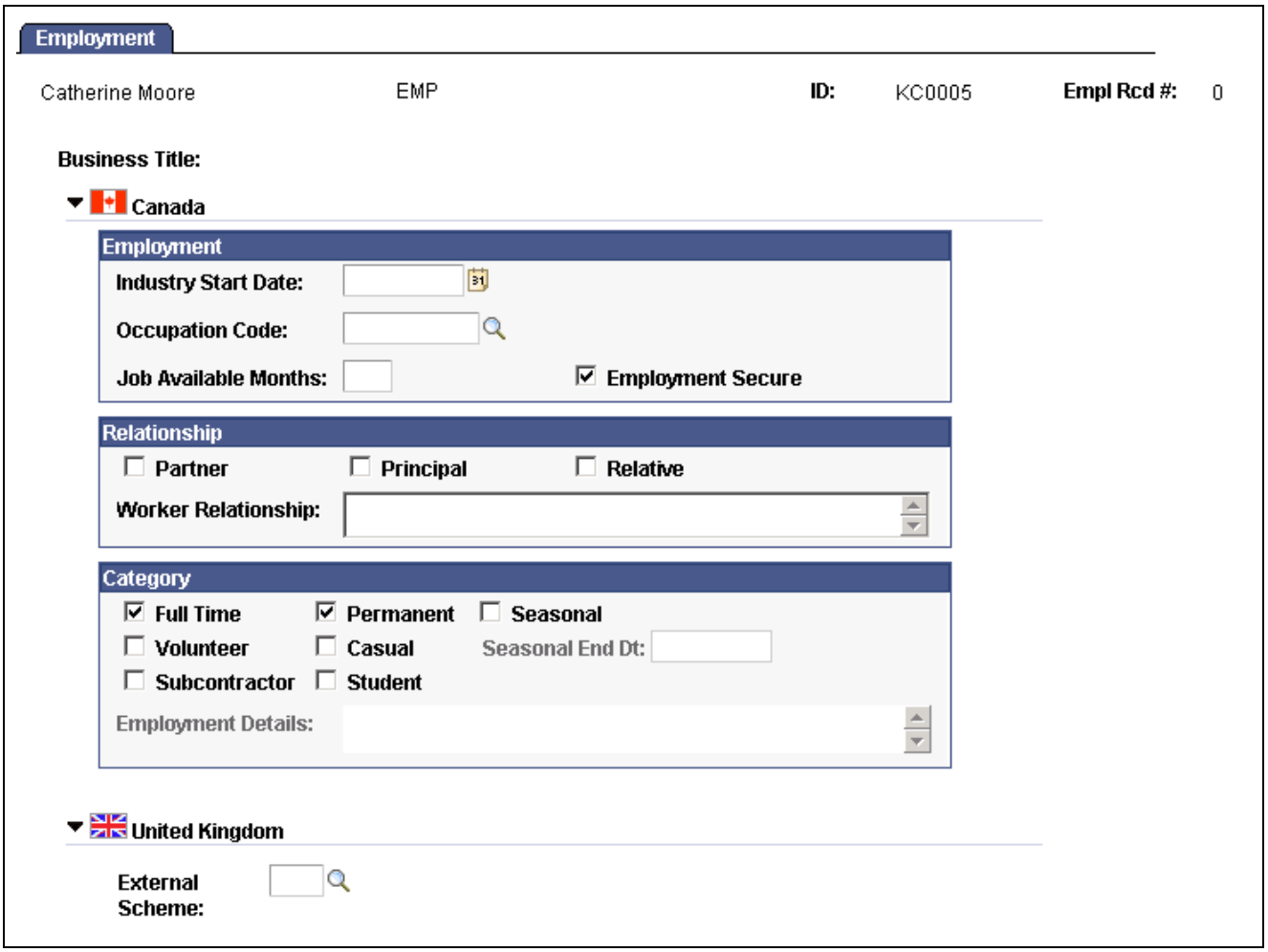
The information in this group box is needed for reporting to the employer's liability insurance association.

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 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

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 is 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 is required 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 a 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

This section discusses how to record employee health details.

The Health Card (GVT_HEALTH_CARD) component and the Health Card Review (HEALTH_CARD_RVW) component enable you to complete employee annual health and safety profiles. Refer to the data contained on these pages when you create reports that track regulatory compliance, reactions to occupational exposures, or exam results, or when you create preventive health-care programs.

Note. Health card pages are accessed in both the Health Card and the Health Card Review components. The Health Card Review component also tracks the results of medical exams, such as physicals, eye, and ear exams.

See Also

Chapter 6, "Processing Rehabilitation, Claims, and Examination Data," Tracking Employee Medical Exam Results, page 113

Pages Used to Maintain Employee Health Cards

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

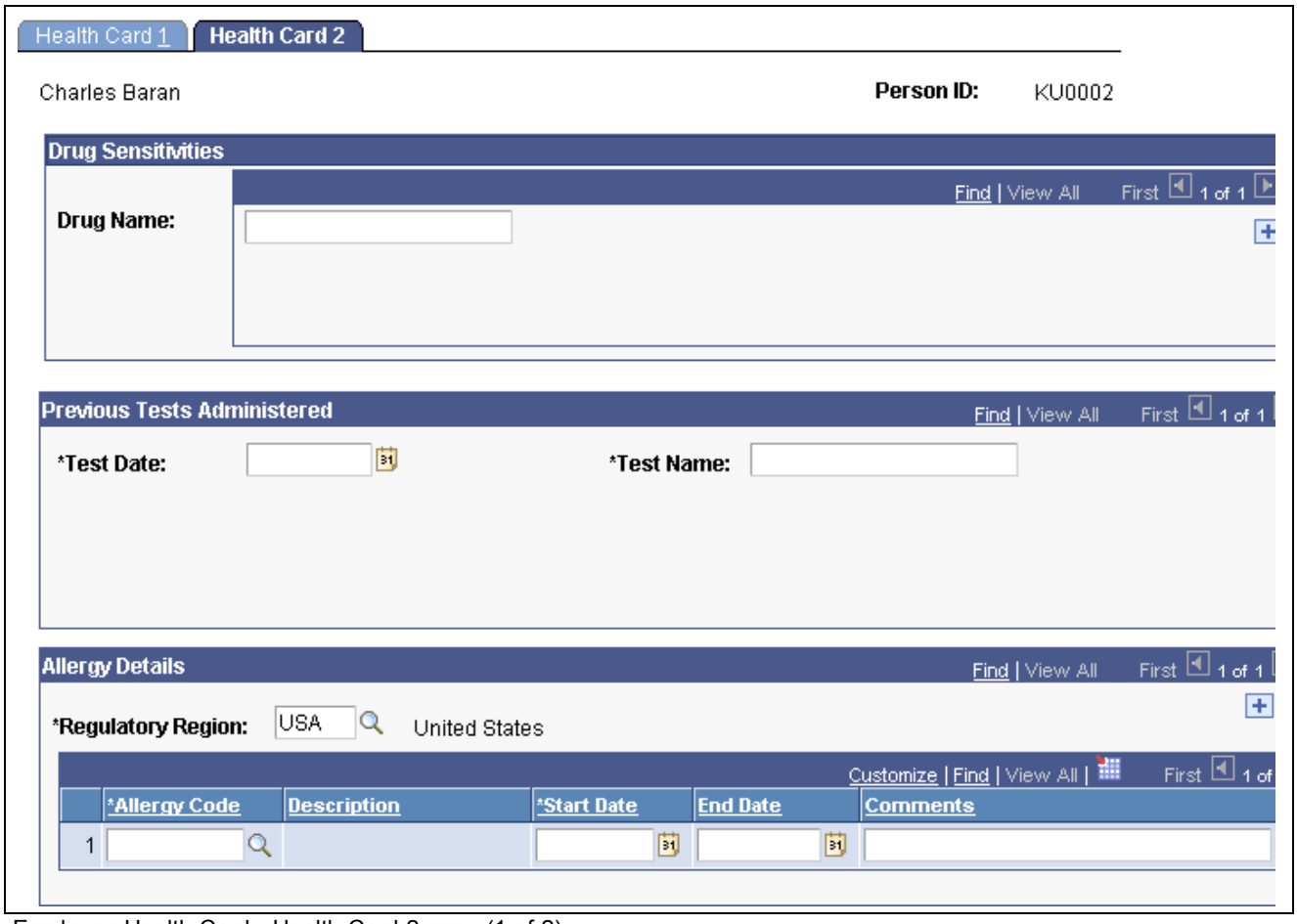
See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Setting Up and Installing PeopleSoft HRMS," Administering Country Codes

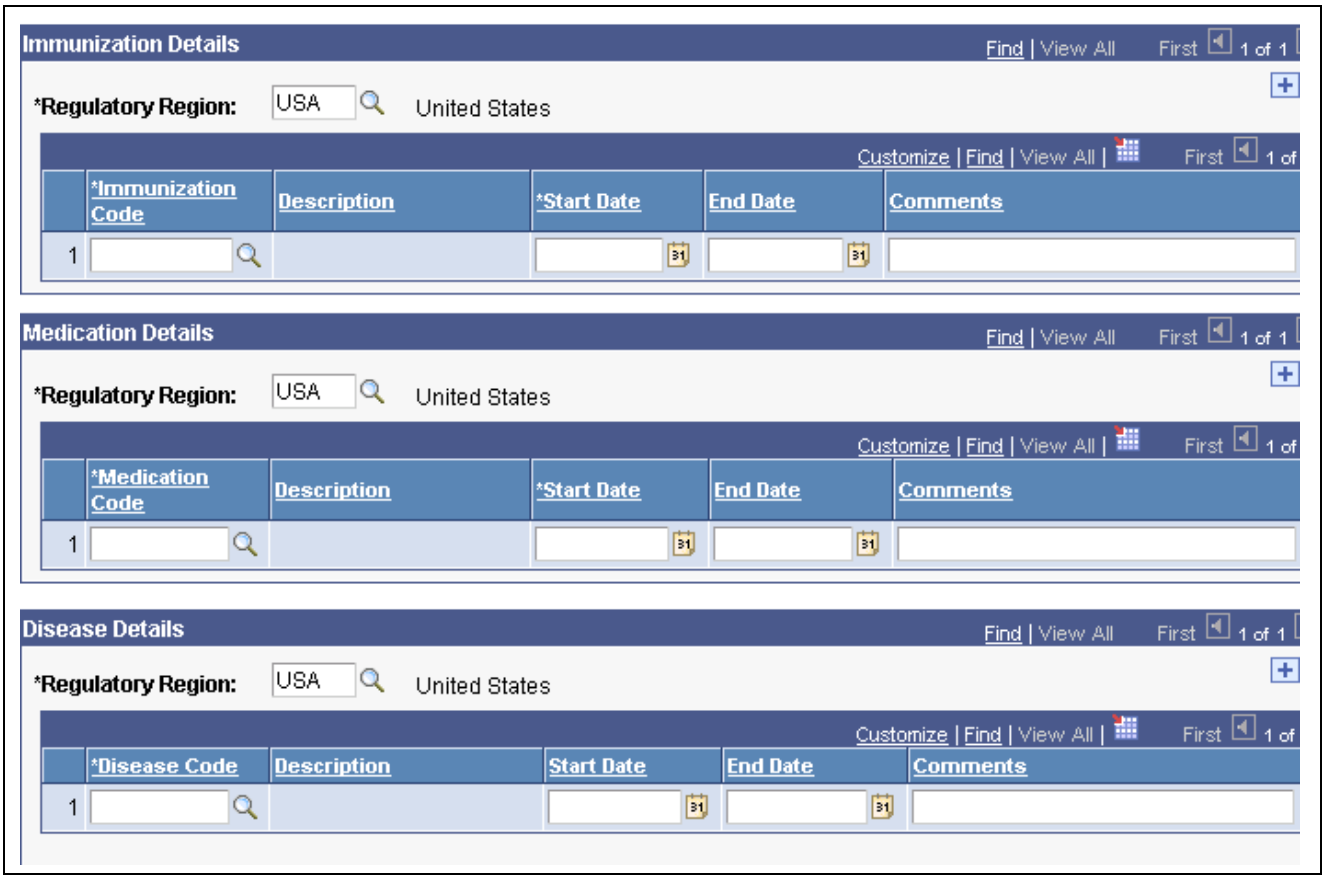
Recording Employee Health Details

Access the Health Card - Health Card 2 page.

Note. This page is similar in format and appearance to the Health Card 1, Health Card 3, and Health Card 4 pages.



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



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

Record the names of any drugs to which the employee is sensitive, tests that were previously administered, identify allergies, immunizations, medication and disease details.

Entering Family Details

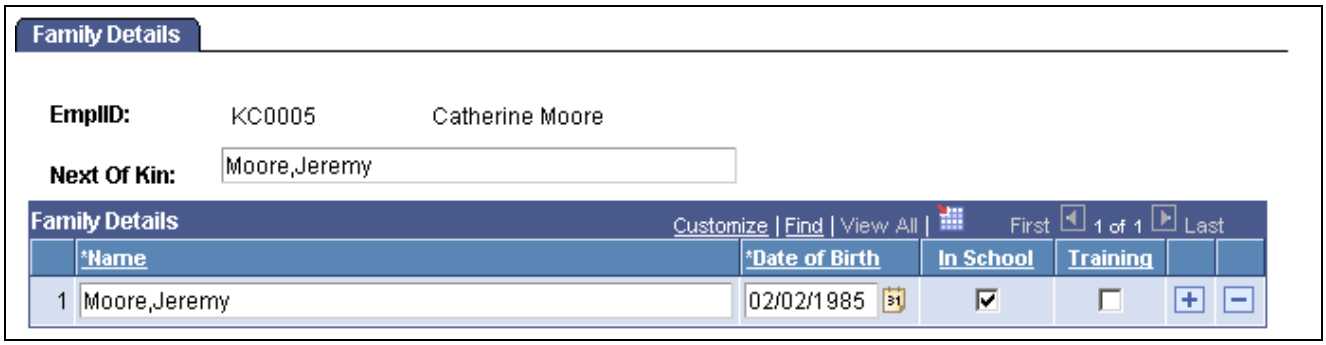
After you set up the detail data for employees and non-employees, use the Family Details page to enter information about family members.

Page Used to Set Up Family Information

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

Entering Family Information

Access the Family Details page.



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 5

Creating and Tracking Incidents

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

- Enter 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.
- (GBR) Collect RIDDOR data for UK reports.
- (MEX) Define mixed committees for Mexico.

Understanding Health and Safety Incidents

This section discusses:

- New incident entry.
- Incident numbers.
- Incident reports.

New Incident Entry

Use the injury and illness pages to track an 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.

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.

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

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

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

Incident Reports

The system generates a number of incident reports, some of which contain information that is reported to government agencies.

Entering Health and Safety Incident Details

This section discusses how to:

- Add and update incidents.
- Record notification details.
- Describe incident details.
- Record the location of an incident.
- Record travel-related information.
- Enter travel route details.
- Identify people connected to an incident.
- Maintain notification requirements.

Pages Used to Enter Health and Safety Incidents

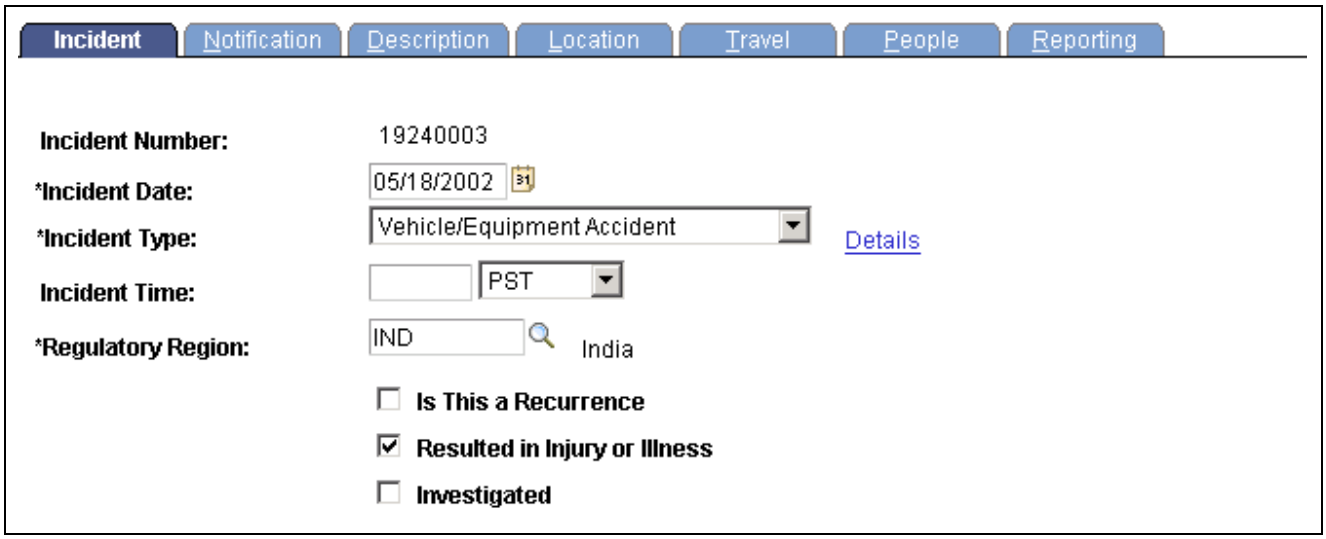
Page Name	Object Name	Navigation	Usage
Incident Details - Incident	HS_INCIDENT	Workforce Monitoring, Health and Safety, Obtain Incident Information, Incident Details, Incident	Add a new incident or update an existing incident.
Vehicle/Equipment Accident Details	HS_INCIDENT_SEC	Click the Details link on the Incident Details - Incident page. This link is visible for vehicle or equipment-related incidents only.	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 that employees generate.

Page Name	Object Name	Navigation	Usage
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.
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 Incident Details - Location page.	Enter the location and address information for those incidents that occur off an organization's premises.
Edit Address	EO_ADDR_USA_SEC	Click the Edit Address link on the Incident Details - Location page.	Edit existing address information that is 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 Click the Route Details link on the Incident Details - Travel page.	Provide additional travel route details for health and safety incidents.
Break Details	HS_INC_BREAK_SEC	Click the Break Details link on the Incident Details - 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 Incident Details - Travel page.	Enter information about animals that are 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 who are connected to the incident. These are people who are not injured or ill in the incident.

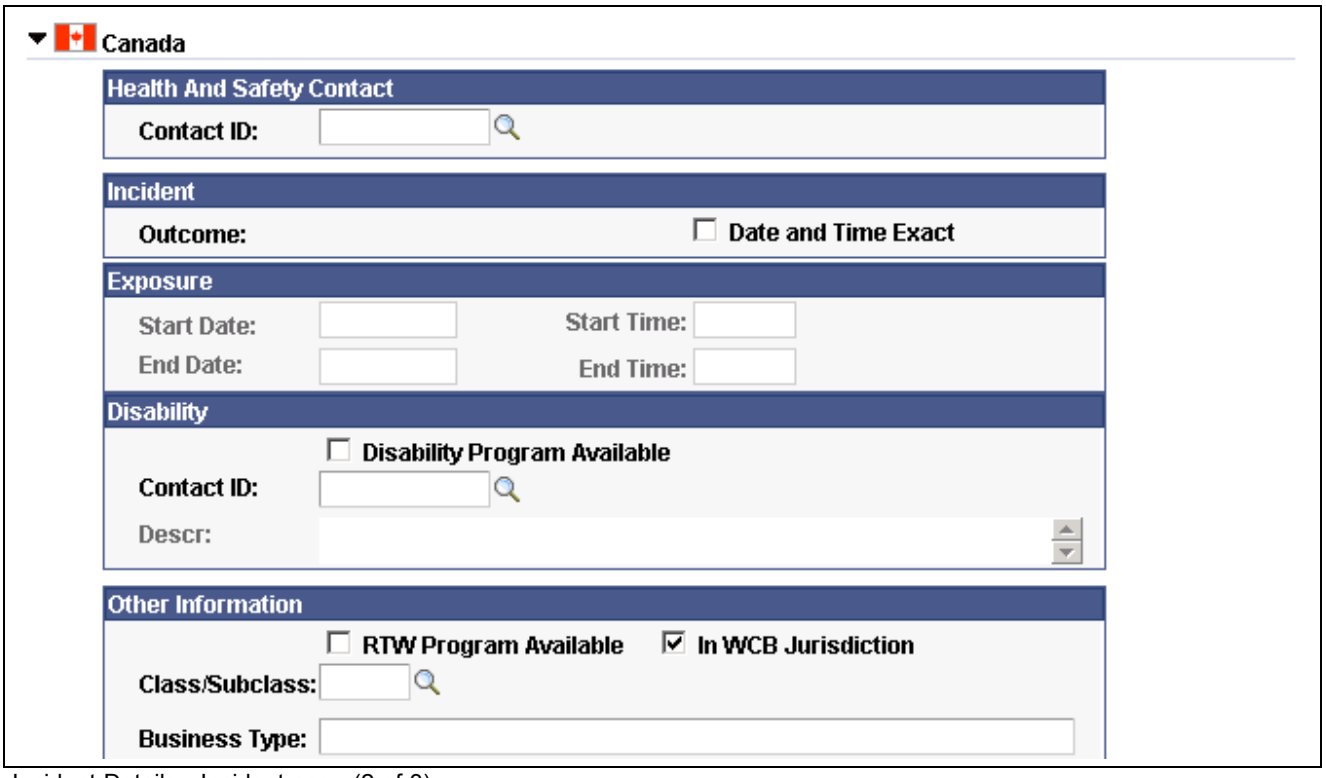
Page Name	Object Name	Navigation	Usage
Incident Details - People: Contact Address	HS_INC_PPLADDR_SEC	Click the Edit Address link on the People page.	Enter address information for the witnesses, investigators, and other contacts on the Incident Details - People page. **Note.** (CAN) Users in British Columbia who report incidents to the BC WCB electronically must provide address information for all persons who are connected to the incident.
Incident Details - Reporting	HS_INC_REPORT	Workforce Monitoring, Health and Safety, Obtain Incident Information, Incident Details, Reporting	Maintain documentation showing that you notified the proper authorities of the incident.

Adding and Updating Incidents

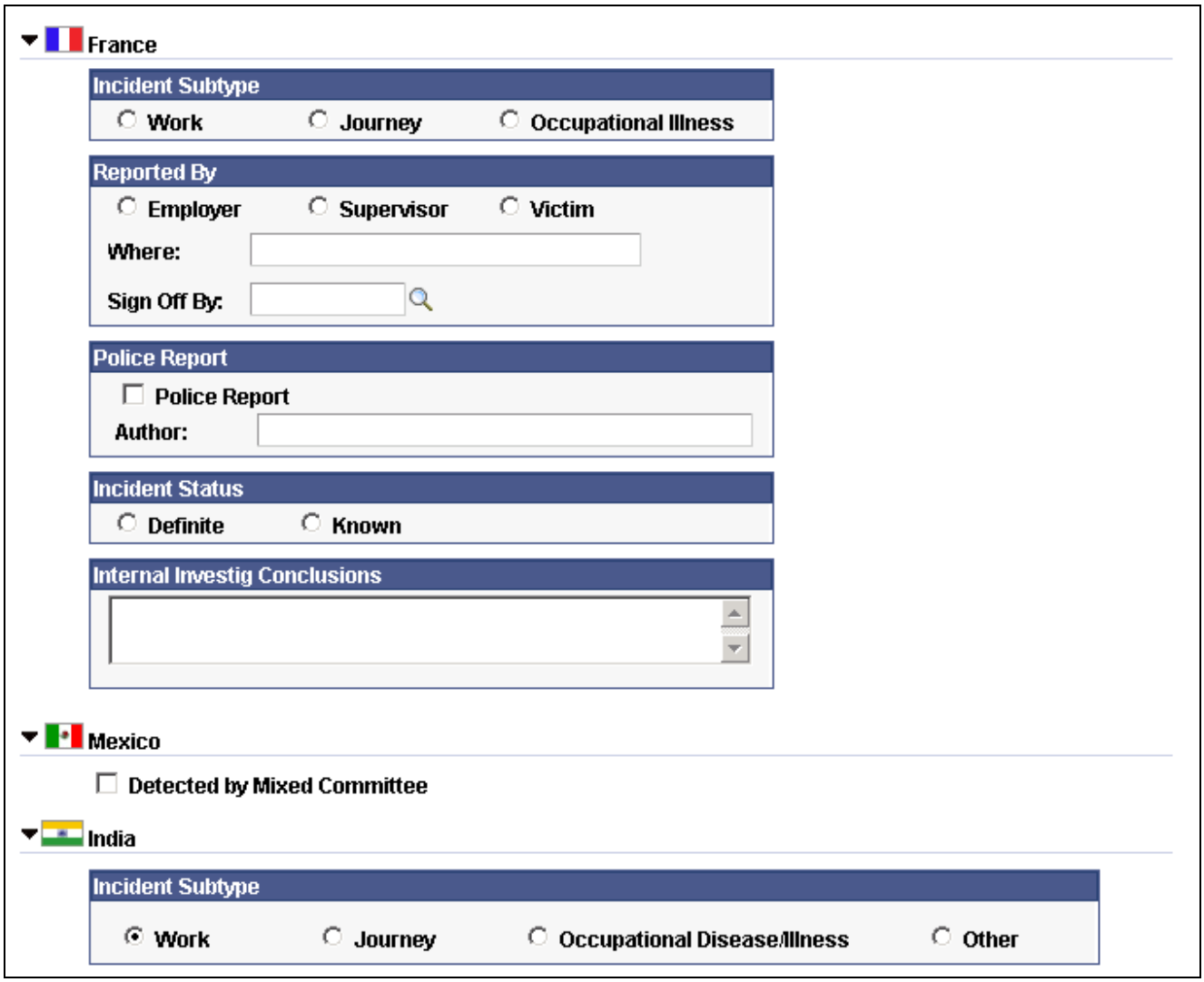
Access the Incident Details - Incident page.



Incident Details - Incident page (1 of 3)



Incident Details - Incident page (2 of 3)



Incident Details - Incident page (3 of 3)

Incident Number The incident number that you entered appears here.

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

Incident Type The default value is *Incident,* which you can change. The selected value controls the availability of other fields that are in the component.

For BC WCB reports: If you file incident reports electronically with the BC WCB, 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 *Vehicle/Equipment Accident,* the Details link appears. Click this link to access the Vehicle/Equipment Accident Details page.

Incident Date The default value is today's date, which you can change.

Incident Time Enter the time that the incident occurred.

If you are reporting to the BC WCB, ensure that you enter the time.

Regulatory Region Enter the regulatory region for the incident. When you add an incident, the user's regulatory region that is specified in user preferences appears by default. You can override this value.

Note. This field controls the values that are returned by all of the Monitoring Health and Safety setup tables that use setID as their key field.

Warning! If you change the regulatory region for an existing incident, and the setID for the previous and current regulatory regions differ, the system deletes all of the relevant linked values from the setup tables. Before proceeding with the change, the system prompts you to confirm the action. When the original information is deleted, you must reenter 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 (reported to employee ID) 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 is 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 the German operations are tracked using the Illness Tracking (HS_ILLNESS_GER) component.

(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 warnings, you must set the Regulatory Region for the incident to *CANBC*. Even the creation of the extract file does not work without this because it is designed to focus on British Columbia incidents only.

Outcome The value that appears in this field is derived from the most severe injury outcome that you enter 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, the system verifies that an injury is entered before you save the incident.

When you save the incident, the system associates an incident outcome with each injury outcome. For example, if only one person is injured, 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.

Possible values for the Outcome field are:

Reported Only: An injury occurred but no medical attention is sought nor is time lost.

Healthcare Only: The injured person visited a health-care practitioner, but no time loss beyond the day of injury occurred. In some WCB jurisdictions, this is also known as medical aid.

Short Term Disability: The injured worker is off work beyond the day of the injury. In some WCB jurisdictions, this is also known as wage loss.

Fatal: A fatal injury.

Dangerous Occurrence: 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 exposure incident type on the primary page, enter the exposure start date and time and end date and time, if they're known.

Disability Program Available Select if there is a disability program available at the 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 the organization.

In WCB Jurisdiction Select to indicate if the business operation that is involved is in the WCB jurisdiction.

Class/Subclass Enter the industry class or subclass code.

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

(FRA) France

Where Indicate where the incident is 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 is prepared.

Author Identify the author of the police report.

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

(MEX) Mexico

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

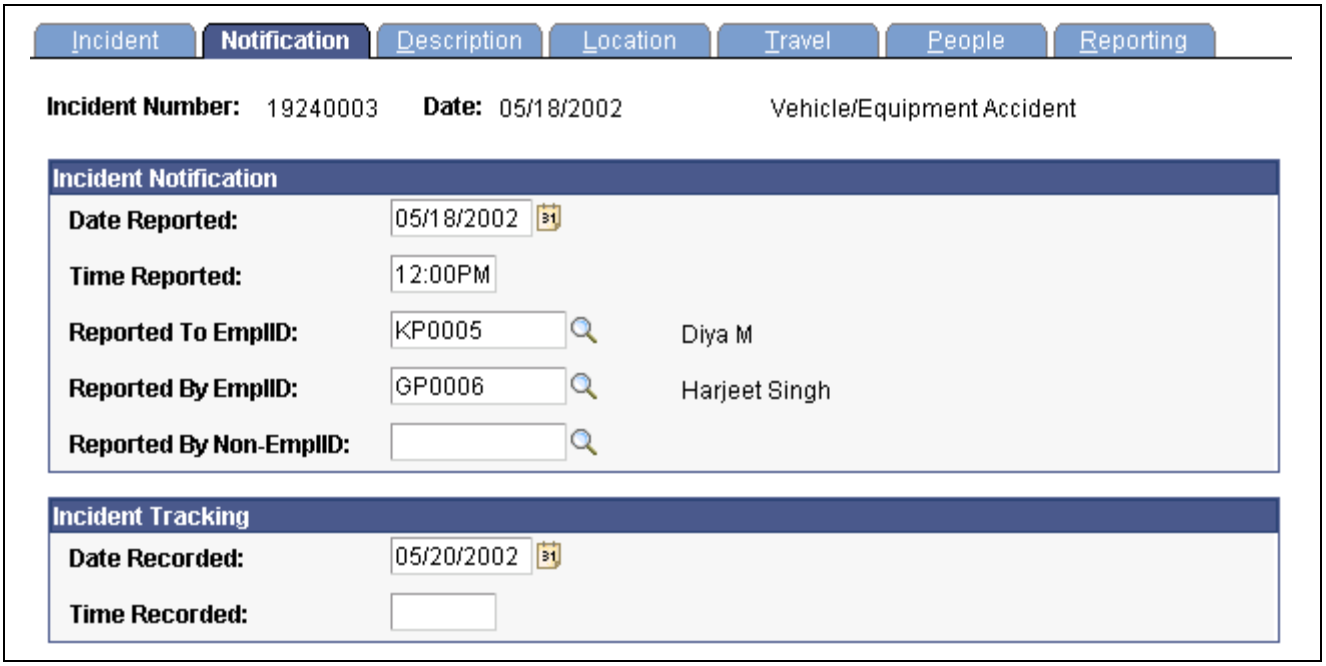
Mixed Committee Select the name of the mixed committee. This field appears only if you select the Detected by Mixed Committee check box. Define mixed committees on the Mixed Committee page.

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Working with Regulatory Regions"

Recording Notification Details

Access the Incident Details - Notification page.



Incident Details - Notification page

Date Reported and**Time Reported** Enter the date and time that the incident is reported to a company official or employee.

Reported To EmplID(reported to employee ID) Enter the employee ID of the organization official or employee who received the report, or select from the list of values that come from personal data.

Reported By EmplID (reported by employee ID) and **Reported By Non-EmplID**(reported by non-employee ID) Enter an ID for the employee or non-employee who reported the incident.

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.

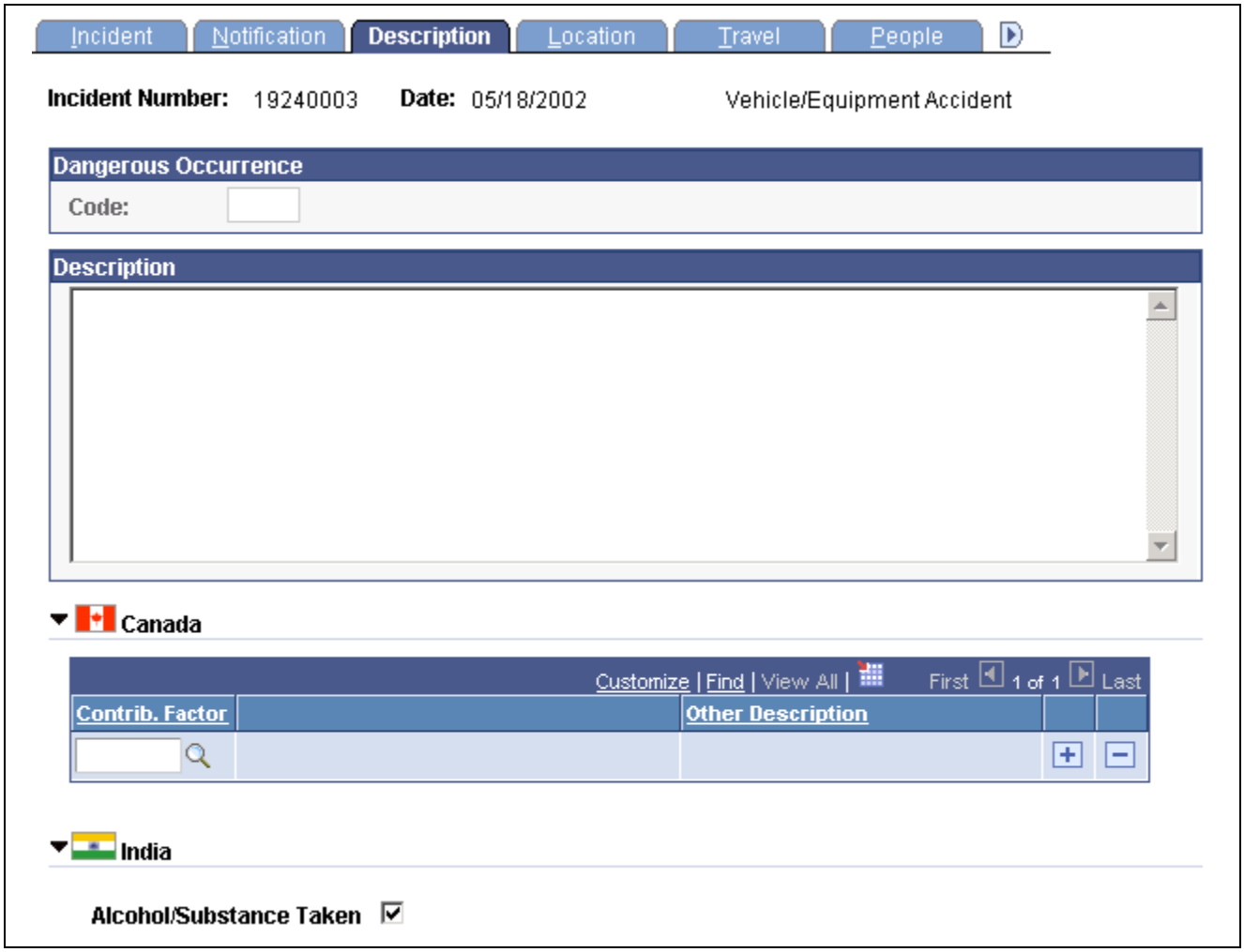
Incident Tracking Use this group box for recording purposes. For example, track when the incident report or notification is first documented by an organization official in writing. In this example, you enter the date recorded and time recorded to track this information internally.

You can also use this field to track another date, for example, the date that preexisting conditions began or the date when the employee began missing work. Alternatively, you can track the date that an internal report, note, or memorandum is written to document the incident. For users who are in the United States subject to Occupational Safety and Health Administration (OSHA) regulations, the date recorded might represent the date that the incident is first entered into the PeopleSoft system.

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

Describing Incident Details

Access the Incident Details - Description page.



Incident Details - Description page

Code For most incident types, this field is unavailable. When the incident type that you selected on the Incident page is dangerous occurrence, the Code field is available. The codes from which you can select 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. The Other Description field becomes 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.

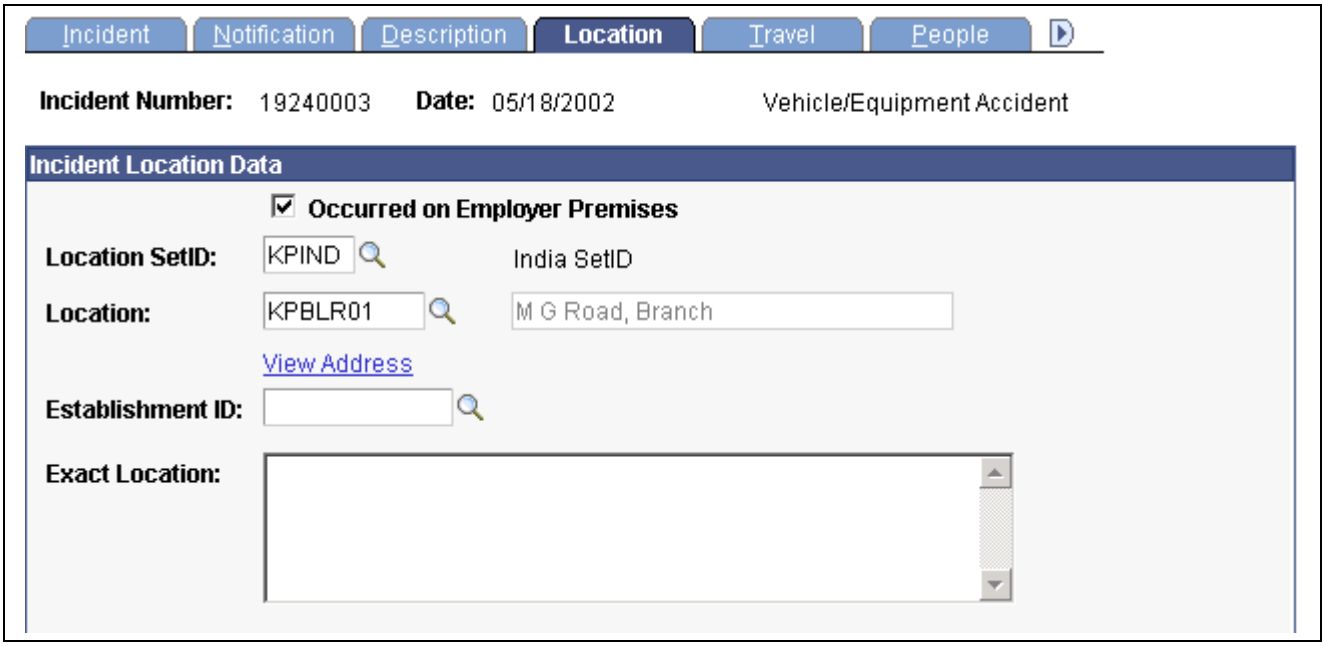
(IND) India

Alcohol/Substance Taken

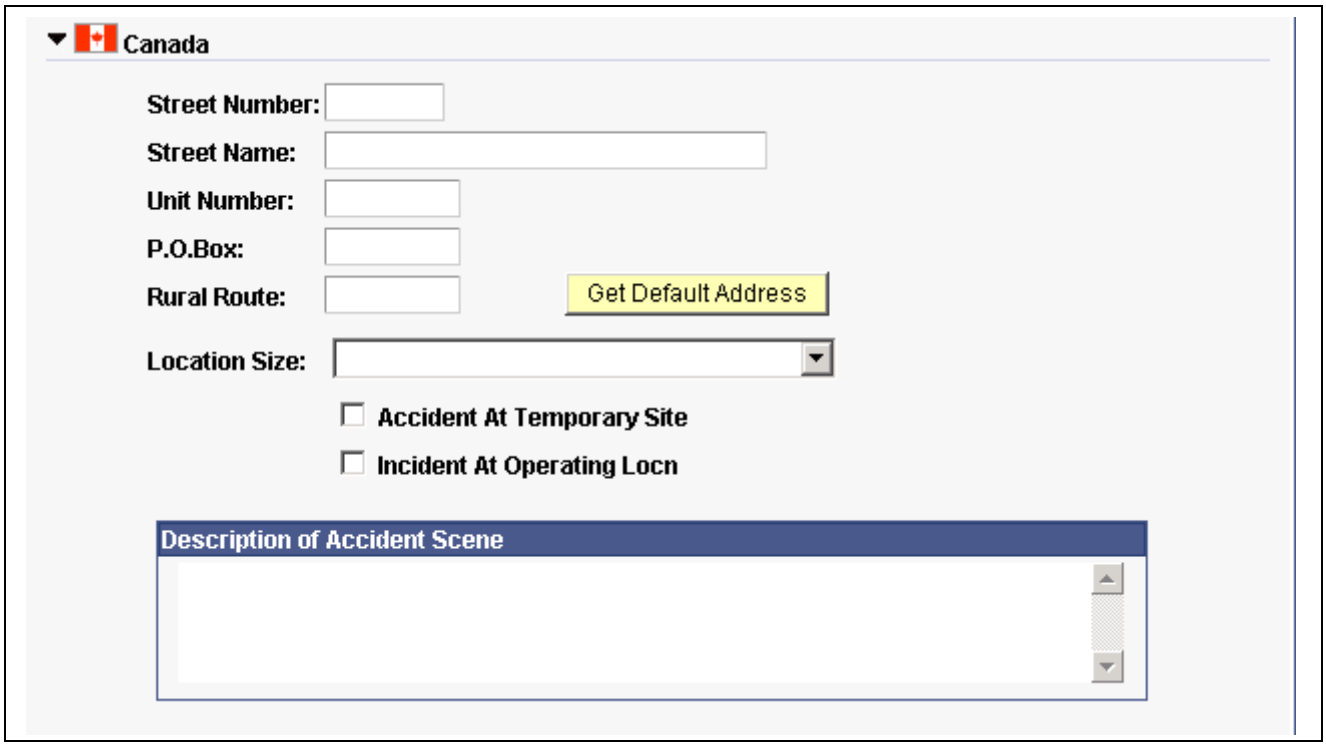
Select if alcohol or a substance is taken during the time of the incident.

Recording the Location of an Incident

Access the Incident Details - Location page.



Incident Details - Location page (1 of 3)



Incident Details - Location page (2 of 3)



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, 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 can 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 select.

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

Edit Address Click this link to view or edit the address where the incident occurred.

- If the incident occurred on the employer's premises you can only view the address. The address information is populated from the Location table.
- If the incident occurred off the employer's premises, this link accesses the Address Data page for you to 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, click the *Get Default Address* button to populate the fields that are on this page.

Street Number, Street Name, Unit Number, P.O. Box, and**Rural Route** If the system does not have street number and street name information for this employee, enter additional address details directly into these fields. Some of this information is needed if the incident location is at a nonstandard 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. 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 are only required if the location is a nonstandard 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 the 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 Identify the local authority if the incident did not occur at a specific postal code location. For example, if an accident occurs while an employee is

traveling in a vehicle, you might enter the location of the accident 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 the area for clarification.

Public Place Select if the incident location is a public place.

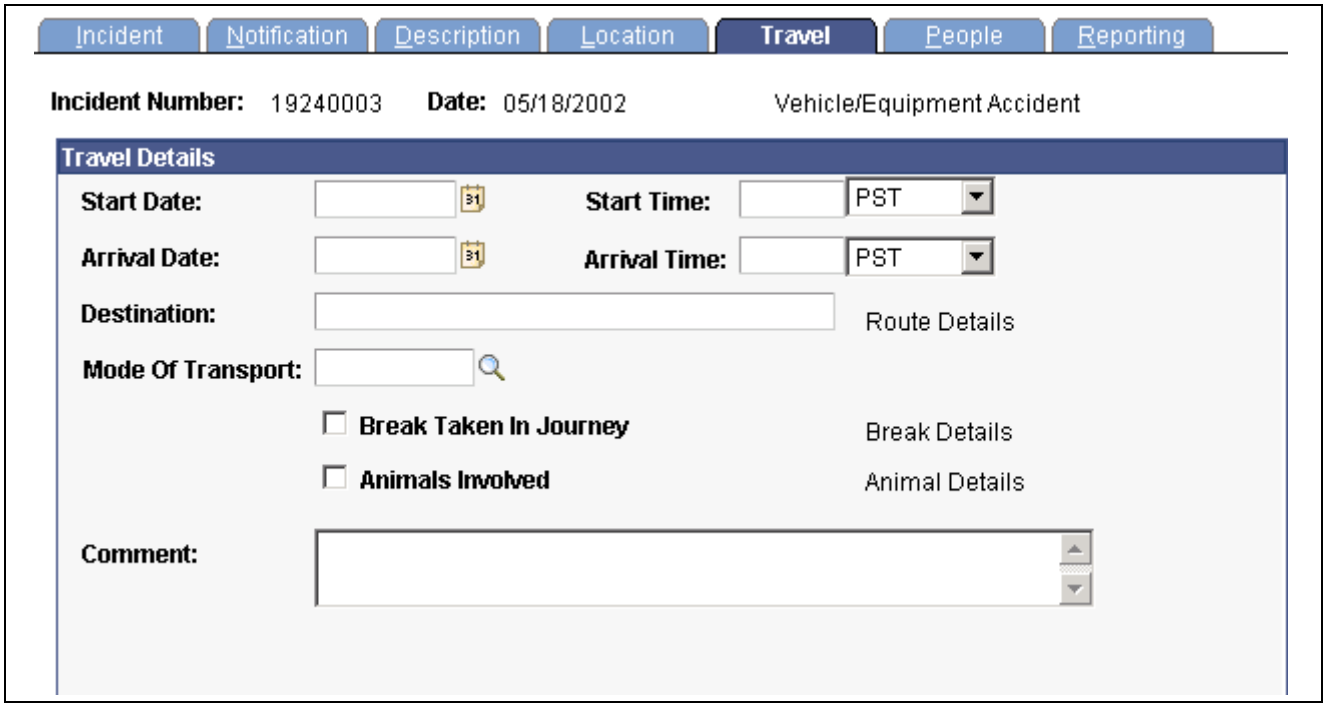
(IND) India

Establishment ID Enter the ID of the establishment where the incident occurred.

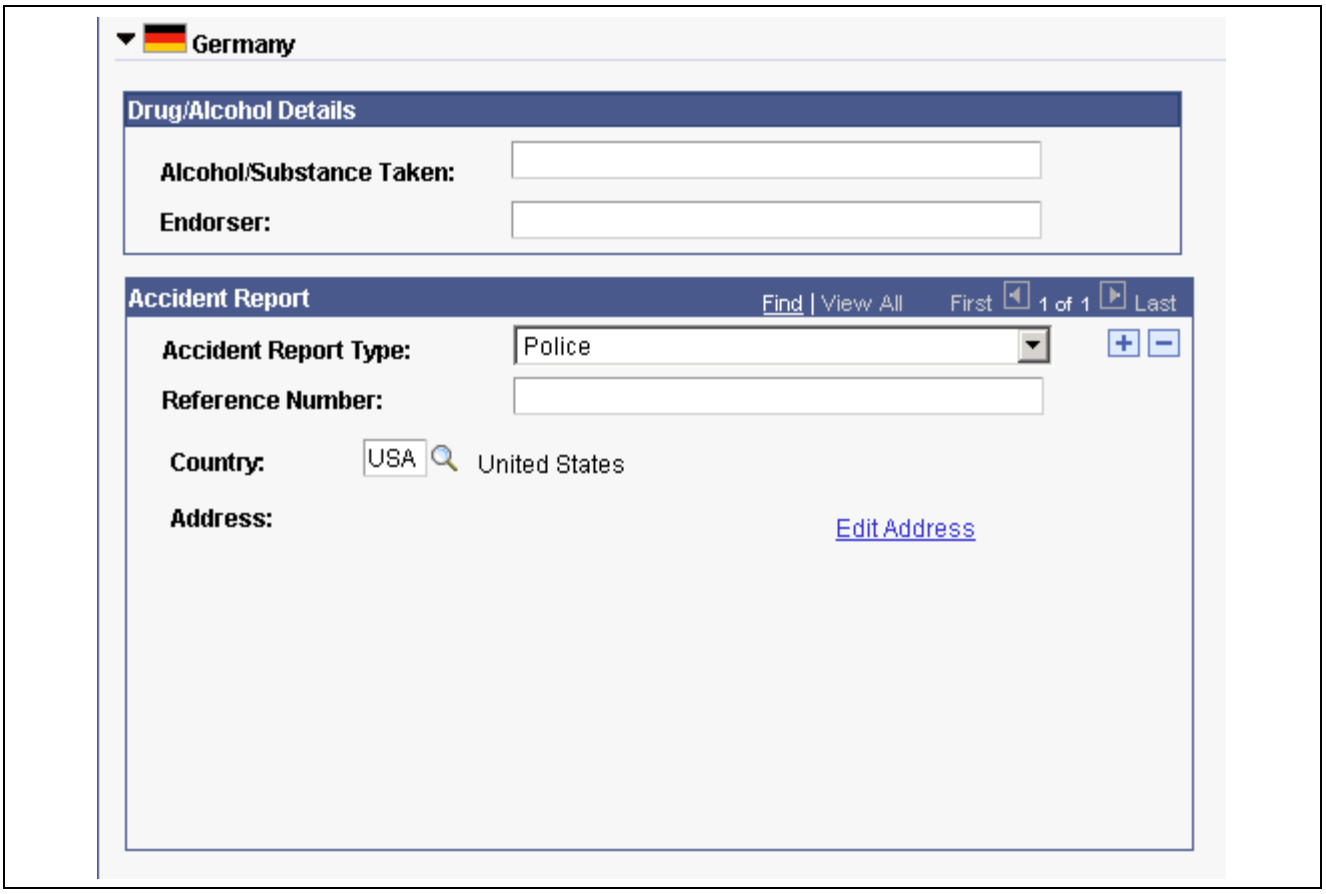
Empl State Ins/Workmen Comp(employee state insurance/workmen compensation) The type of registration under which the establishment is covered appears here.

Recording Travel-Related Incidents

Access the Incident Details - Travel page.



Incident Details - Travel page (1 of 2)



Incident Details - Travel page (2 of 2)

Start Date, Start Time, Arrival Date, and**Arrival Time** Enter these values, 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 if the travel is not continuous. The Break Details link is available. Click the link to access the Break Details page.

Animals Involved Select if an animal is 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, specify how drugs or alcohol are involved in the incident.

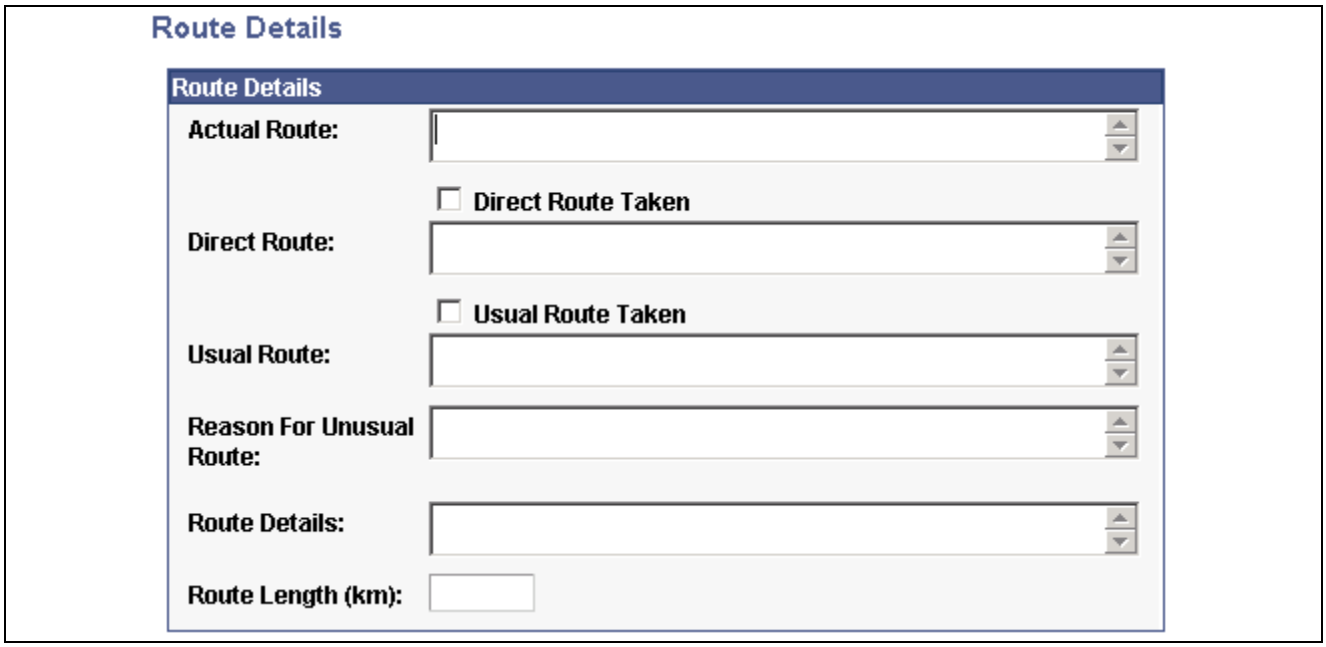
Endorser Record the identity of the person or authority who confirms the information in the Alcohol/Substance Taken field.

Accident Report Type Select from the list of German authorities to indicate the accident report type, if needed.

Reference Number Enter the reference number that this public office is using to store the report.

Entering Additional Travel Route Details

Access the Route Details page.



Route Details page

Actual Route Enter a description of the actual route that is traveled.

Direct Route Taken Select if the actual route is the most direct route that is available.

Direct Route This field is available for entry if you do not select the Direct Route Taken check box. Enter a description of the most direct route.

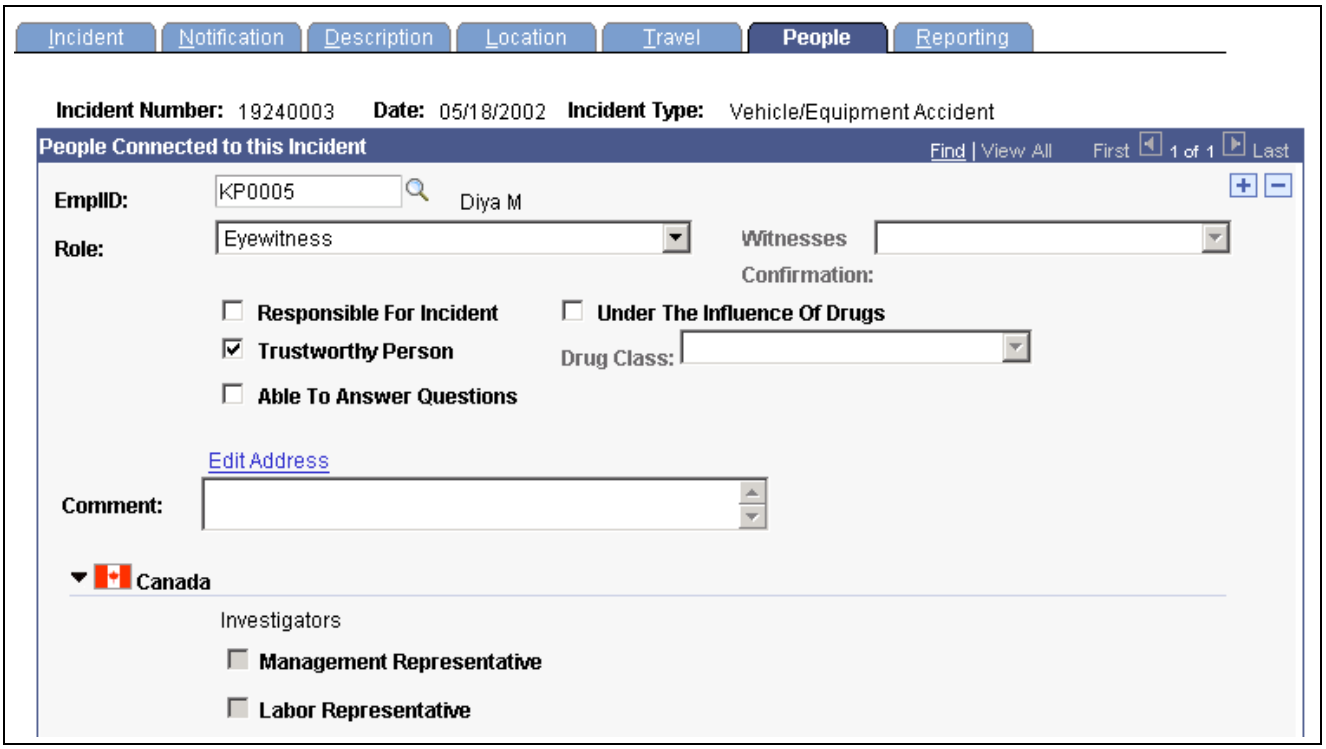
Usual Route Taken Select if the actual route is the usual route.

Usual Route This field is available if you do not select the Usual Route Taken check box. Enter a description of the usual route.

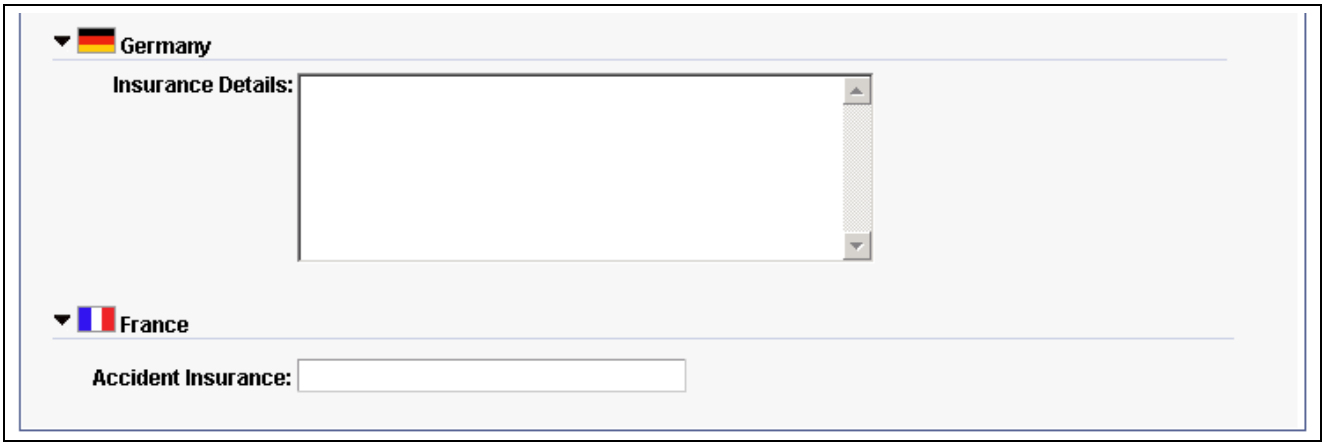
Route Length (km) Enter the kilometers for the actual travel route.

Identifying People Connected to an Incident

Access the Incident Details - People page.



Incident Details - People page (1 of 2)



Incident Details - People page (2 of 2)

People Connected to this Incident

EmplID (employee ID), **Non-Employee ID**

Enter either an employee ID or a non-employee ID. The field that you do not use disappears.

Note. Enter employees into the system by using the Administer Workforce business process. Enter non-employees into the system by using the Non-Employee component (HS_NE_PERS_DATA) component.

See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce*, "Adding a Person in PeopleSoft Human Resources".

Add a row for each individual who is 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 check box. Use the list of translate values to identify whether or not the witness confirms the statement made by the individual who is involved in the incident.

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

(CAN) Canada

Users in British Columbia who report incidents to the BC WCB electronically must identify an Investigator in the Role field when the report is a final report. This is true for all incident outcomes other than reported only. In addition, you must select either the Management Representative or the Labor Representative check box. For incident outcomes of the type *Reported Only*, no investigator information is required.

To provide address information for all persons who are 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

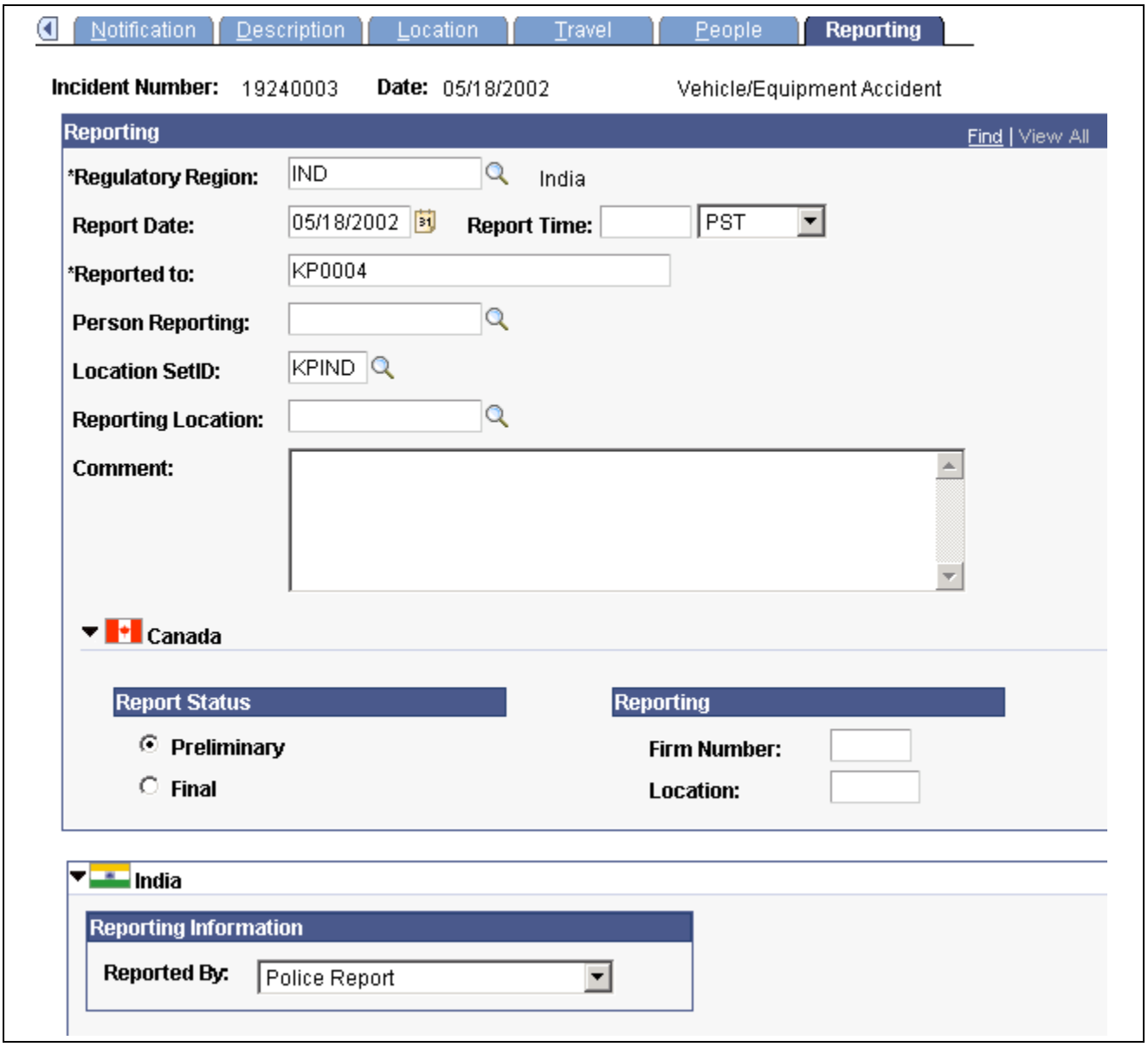
Insurance Details Enter additional insurance information for people who are involved in German incidents.

(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.



Incident Details - Reporting page

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 who makes 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 that are supported in the system and for the Canadian provinces.

Warning! If you change the regulatory region for an existing incident, and the setID for the previous and current regulatory regions differ, the system deletes all of the relevant linked values from the setup tables. Before proceeding with the change, the system prompts you to confirm the action. When the original information is deleted, you must reenter the data for the incident.

Person Reporting Select the person who is reporting (employee ID). The values come from the Workforce Administration business process.

Location SetID Select the location setID for the location of the person who is 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, select *CANBC* in the Regulatory Region field. This is critical because warning messages for the BC WCB EDI file functionality is 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. When the report status is final, you must identify an investigator on the Incident - People page.

(IND) India

Reported By Select if the incident is reported by *Airlines, Police Report, Railways, State Transport Administration,* or *Others.*

See Also

PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Working with Regulatory Regions"

Entering Injury Details

This section lists prerequisites and common elements and discusses how to:

- Record work-related injuries.
- Enter injury and illness descriptions.
- Document injury statements.
- Enter injury and illness details.
- Enter medical treatment information.

- Record diagnoses details.
- Record work-related incidents.
- (CAN) Enter long-term earnings.
- Track reporting details.

Use the Injury Details (HS_INJURY_ILL) component to record information about injuries that are sustained in incidents.

Note. (CAN) For incidents in which 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.

Prerequisites

Before you enter injury and illness information, you create an incident, assign an incident type, and select the Resulted In An Injury Or Illness check box on the Incident Details - Incident page.

Common Elements Used in this Section

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

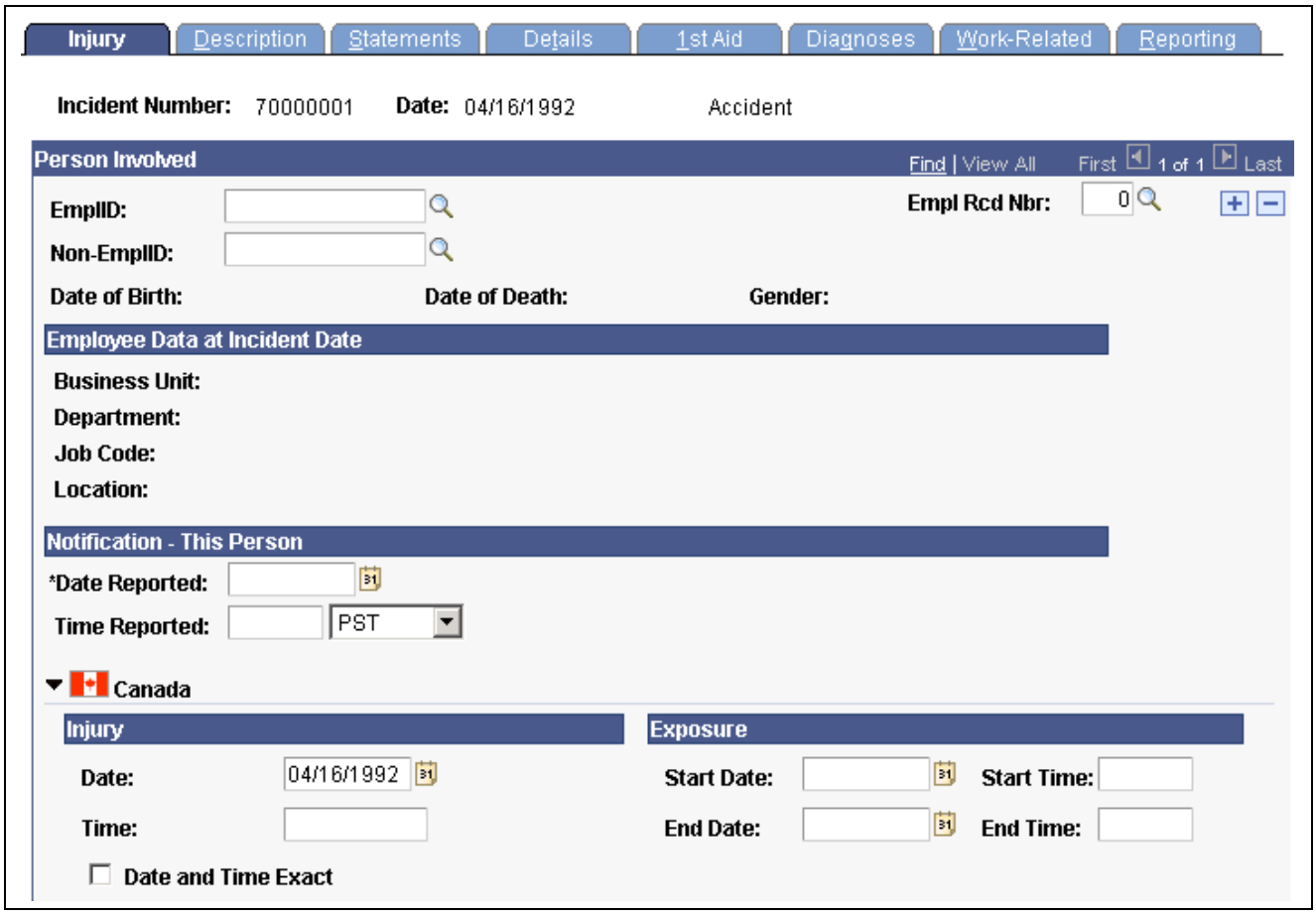
Page Name	Object Name	Navigation	Usage
Injury Details - Injury	HS_INJ_NOTIFY	Workforce Monitoring, Health and Safety, Obtain Incident Information, Injury Details, Injury	Enter information about employees and non-employees who have work-related injuries or illnesses.
Injury Details - Description	HS_INJ_DESCRIPTION	Workforce Monitoring, Health and Safety, Obtain Incident Information, Injury Details, Description	Enter detailed information about the injury or illness or both that are involved in the incident.

Page Name	Object Name	Navigation	Usage
Injury Details - Statements	HS_INJ_STATEMENT	Workforce Monitoring, Health and Safety, Obtain Incident Information, Injury Details, Statements	Document the statements that are 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 that is suffered by each person who is involved in the incident.
Injury Details - Details: Body Parts	HS_INJ_BP_SEC	Click theBody Parts link on the Injury Details - Details page.	Identify body parts that are affected by the injury or illness.
Injury Details - Details: Nature of Injury	HS_INJ_NOI_SEC	Click the Nature of Injury link on the Injury Details - Details page.	Define the nature of the injury or illness.
Injury Details - Details: Source of Injury	HS_INJ_SOI_SEC	Click the Source of Injury link on the Injury Details - Details page.	Identify the source of the injury.
Injury Details - Details: Accident Type	HS_INJ_ACC_SEC	Click the Accident Type link on the Injury Details - 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 Injury Details - 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 who are involved in the incident.
Injury Details - 1st Aid: Ambulance Details	HS_INJ_AID_AMB_SEC	Click the Ambulance Details on the Injury Details - 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 Injury Details - 1st Aid page, select thePrior Disability check box in the Canada group box. 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 Injury Details - 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 that are involved with the injured and ill employees.

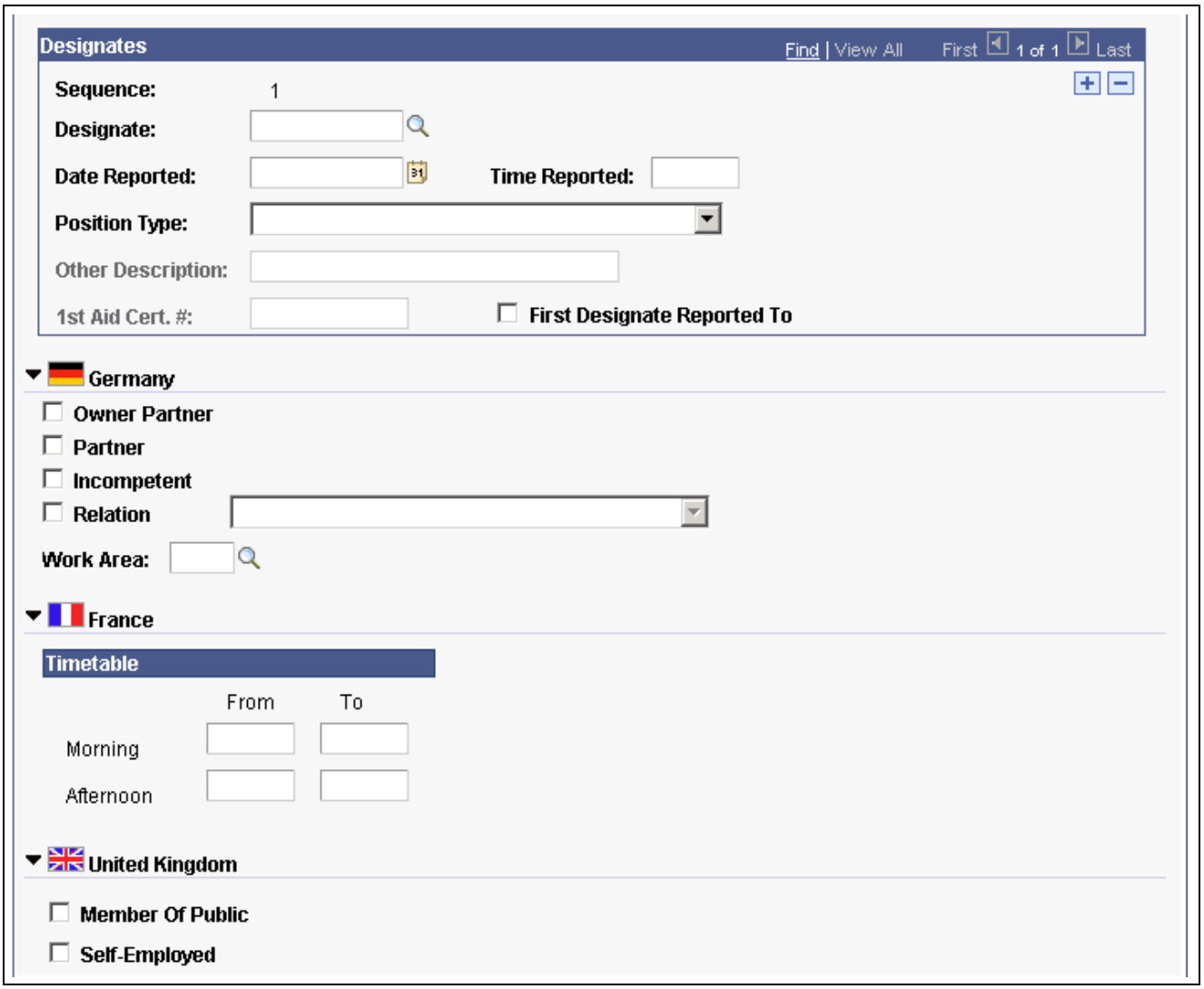
Page Name	Object Name	Navigation	Usage
Injury Details - Diagnoses: Medical Facility Address	HS_INJ_MEDFAC_SEC	Click the View Address link on the Injury Details - Diagnoses page.	View the address of the medical facility.
Injury Details - Work-Related	HS_INJ_WORK	Workforce Monitoring, Health and Safety, 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 Injury Details - 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 Injury Details - 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 Injury Details - Work-Related page.	Enter additional information that is needed for reporting to the WCB, concerning the employee's actions at the time of the incident.
Return To Work	HS_INJ_RTWCAN_SEC	Click the Return to Work link on the Injury Details - Work-Related page.	Enter additional return-to-work details for Canadian employees who are injured or ill in work-related incidents.
Long Term Earnings	HS_INJ_LTECAN_SEC	Click the Long Term Earnings link on the Injury Details - 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 Injury Details - Work-Related page.	Enter additional information about Canadian incidents that is 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.

Recording Work-Related Injuries

Access the Injury Details - Injury page.



Injury Details - Injury page (1 of 2)



Injury Details - Injury page (2 of 2)

EmplID For each person who is involved in the incident, select either an employee ID or a non-employee ID. The person's name, date of birth, gender and, if applicable, the date of death appear next to this field.

Note. If a fatality occurs, enter the date of death in the Workforce Administration business process or the Non-Employee - Personal Details page, as appropriate.

Empl Rcd # (employment record number) If you enter information for an employee who has more than one job, select the employment record number for the job that the employee was performing when the incident occurred.

Employee Data At Incident Date The information that appears 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

In the Injury group box, enter the date and time of the injury. Select the Date and Time Exact check box if the date and time are exact.

In the Exposure group box, enter the exposure start date, start time, end date, and end time, if known

Use the Designates group box to record details about incident designates to whom injuries and incidents are reported. They are distinguished from incident people, who are usually the people who are involved in the incident and are reporting it.

Sequence — This is a sequential number that the system assigns automatically 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 — The value that you select determines the availability of the remaining fields that are on the page. If you select the types *None* or *Worker's Supervisor,* the Other Description and 1st Aid Cert. # fields are unavailable.

1st Aid Cert. # (first aid certificate number) — If you select *First Aid Attendant* as the position type, enter the first aid certificate number for the designate.

Other Description — If you select *Other* in the Position Type field, 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, and **Relation** — Indicate the relationship of the person who was notified to the person who was involved. If you select *Relation,* the associated field is available for selection.

Work Area — Select an option from the values that you set up in the Work Area table.

(FRA) France

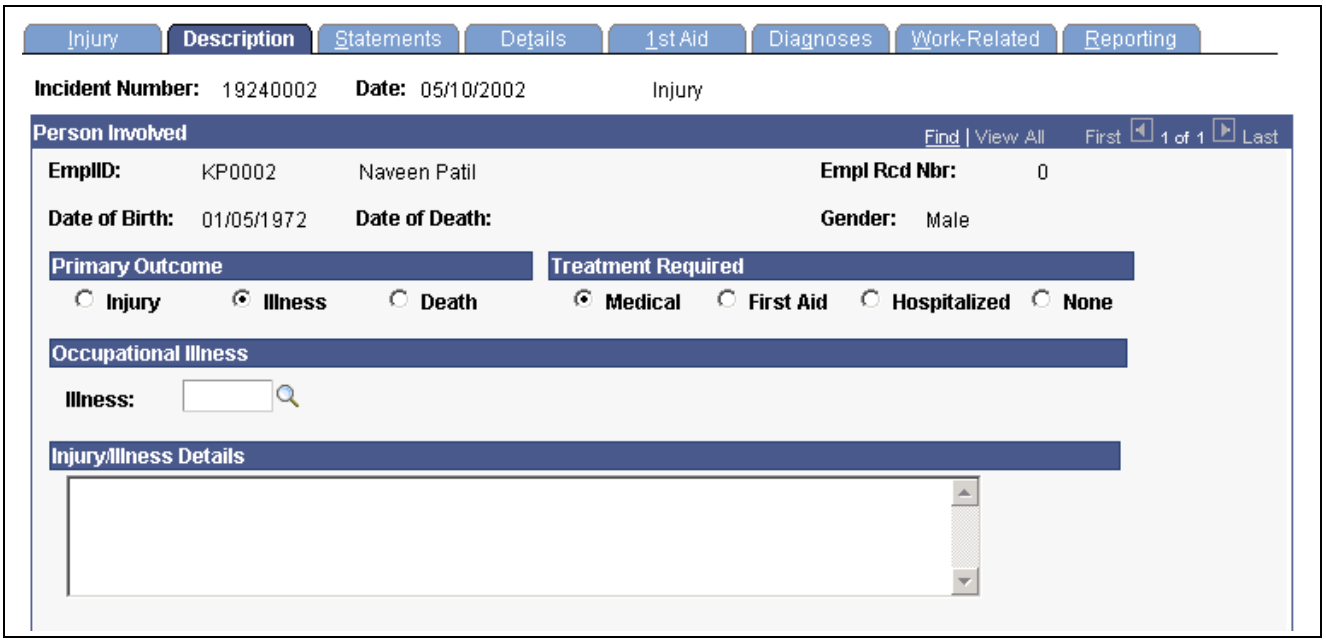
Timetable — Enter the time of the notification.

(GBR) United Kingdom

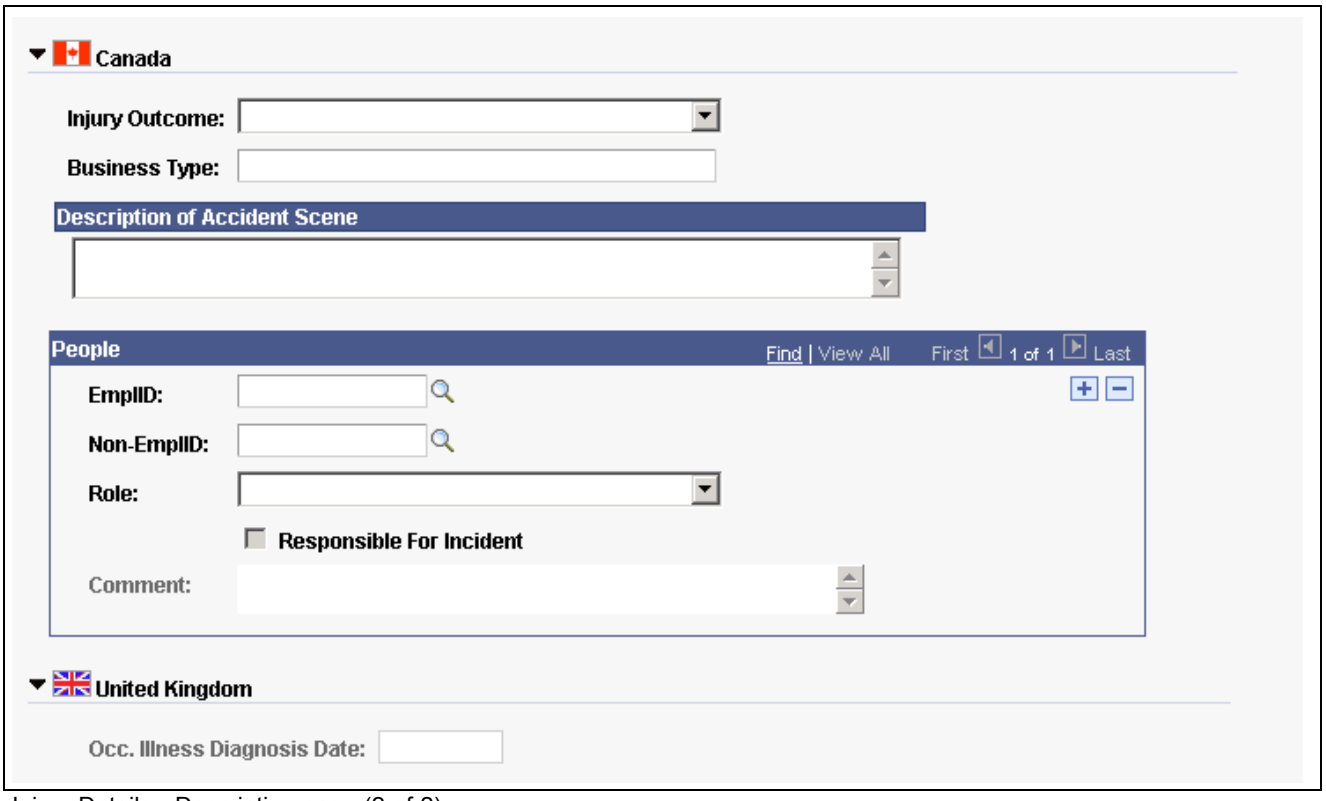
Member Of Public and **Self-Employed** — If the individual who is involved in the incident is a non-employee, indicate if that person is a member of the public or is self-employed.

Entering Injury and Illness Descriptions

Access the Injury Details - Description page.



Injury Details - Description page (1 of 2)



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 German operations are tracked by using the DEU Illness Tracking (HS_ILLNESS_GER) 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 Values are *Fatality, Health Care Only, Reported Only,* and *Short Term Disability.*

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

People

Identify the people who are 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 and **Non-Employee ID** Enter either an employee ID or a non-employee ID.

Note. You must enter the employee into the system by using the Workforce Administration business process, or the non-employee by using Non-Employee Details.

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

Role Select a role for each individual who is 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 select *Other Party* in the Role field, you can select this check box.

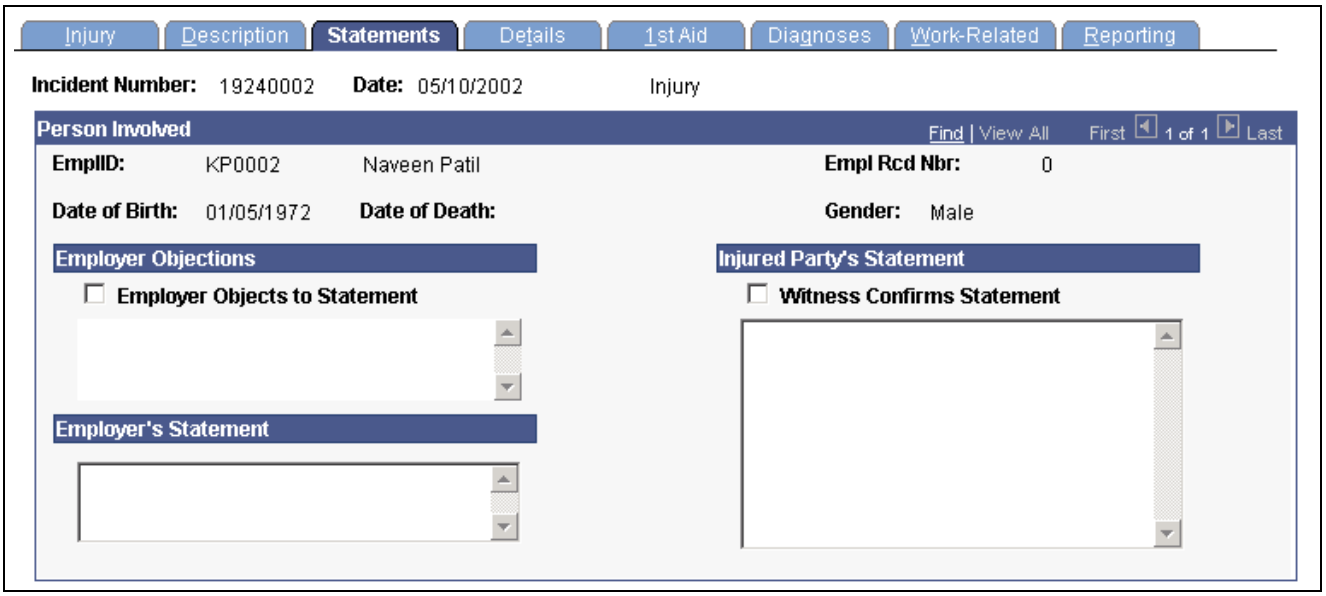
Note. For users in British Columbia who report incidents to the BC WCB electronically, the information that is on this page is not required for incident outcomes that are dangerous occurrences. The Injury Outcome and Business Type are required fields. Remember, the most severe injury outcome for all 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) This field is available when the selected injury outcome is illness.

Documenting Injury Statements

Access the Injury Details - Statements page.



Injury Details - Statements page

Employer's Statement Enter the employer's statement.

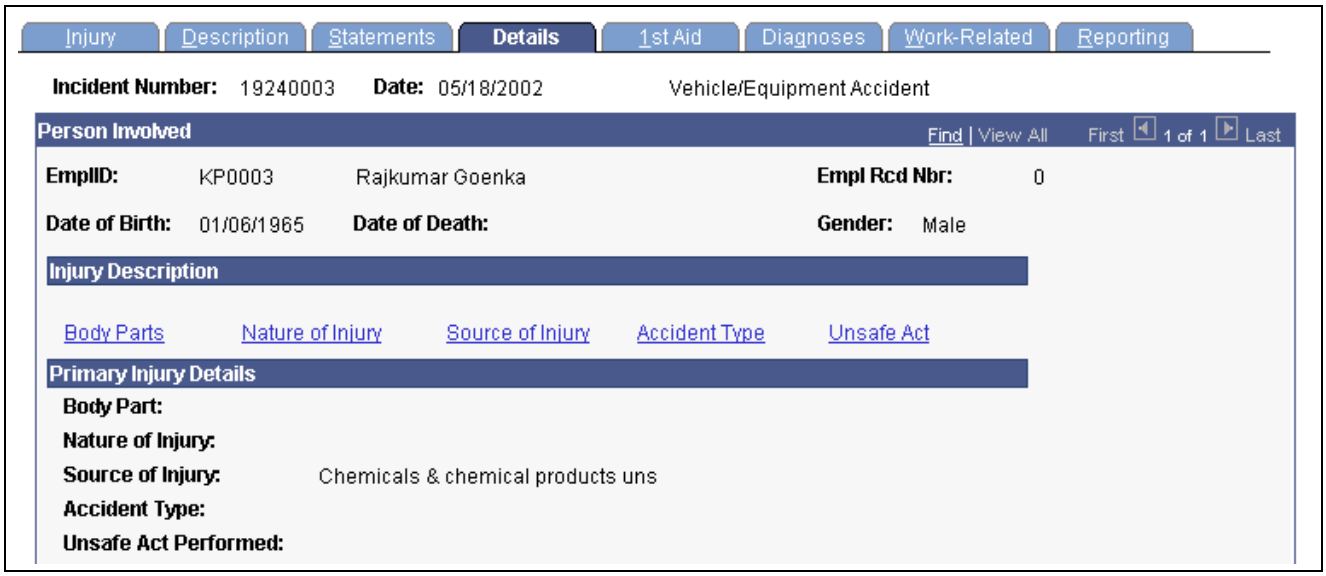
Injured Party's Statement Enter the injured party's statement. Select Witness Confirms Statement if a witness confirms the injured person's statement.

Employer Objections To indicate that there are employer objections to the injured party's statement, select Employer Objects To Statement and enter the objections.

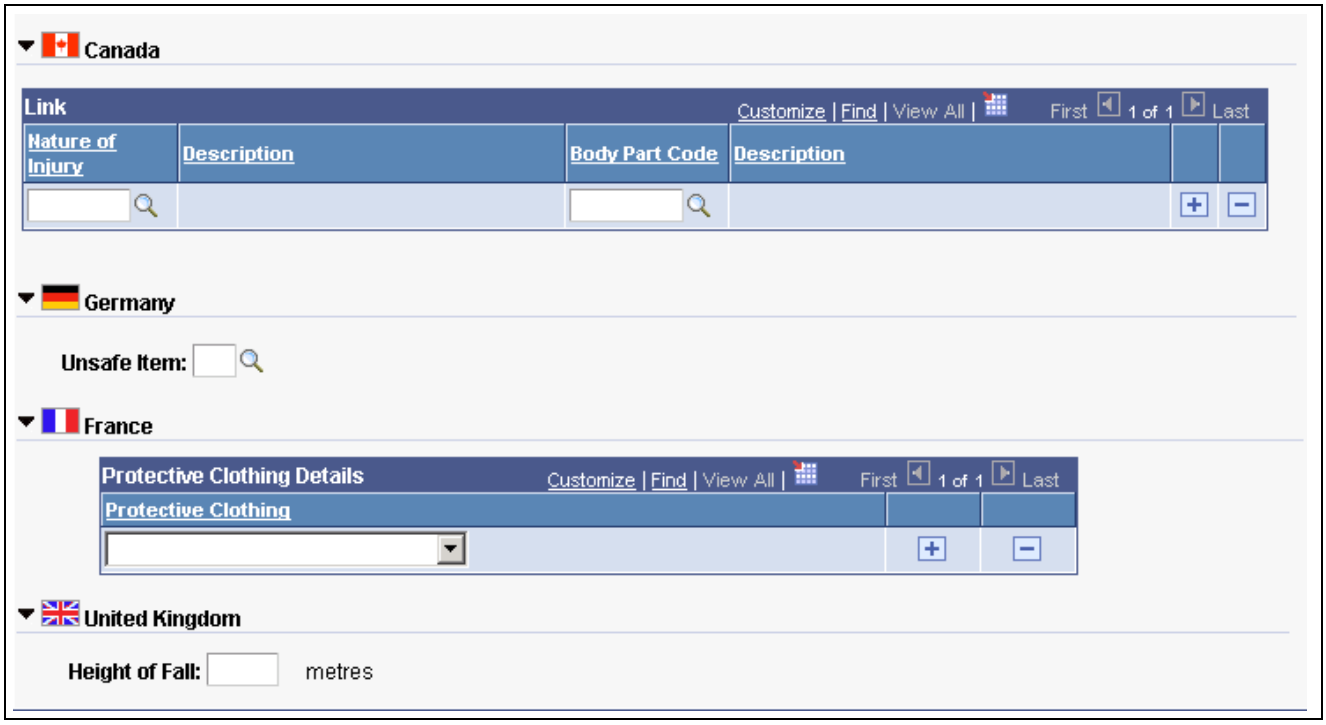
Note. (CAN) For users in British Columbia who report incidents to the BC WCB electronically, the information that is on this page is not required for incident outcomes of the types dangerous occurrences or reported only. The employer's statement is required for incident outcomes of the types health care only, short-term disability, and fatality.

Entering Injury and Illness Details

Access the Injury Details - Details page.



Injury Details - Details page (1 of 2)



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.

Note. Information on the Body Parts, Nature of Injury, and Accident Type pages is required for an incident outcome of reported only. 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 that is 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

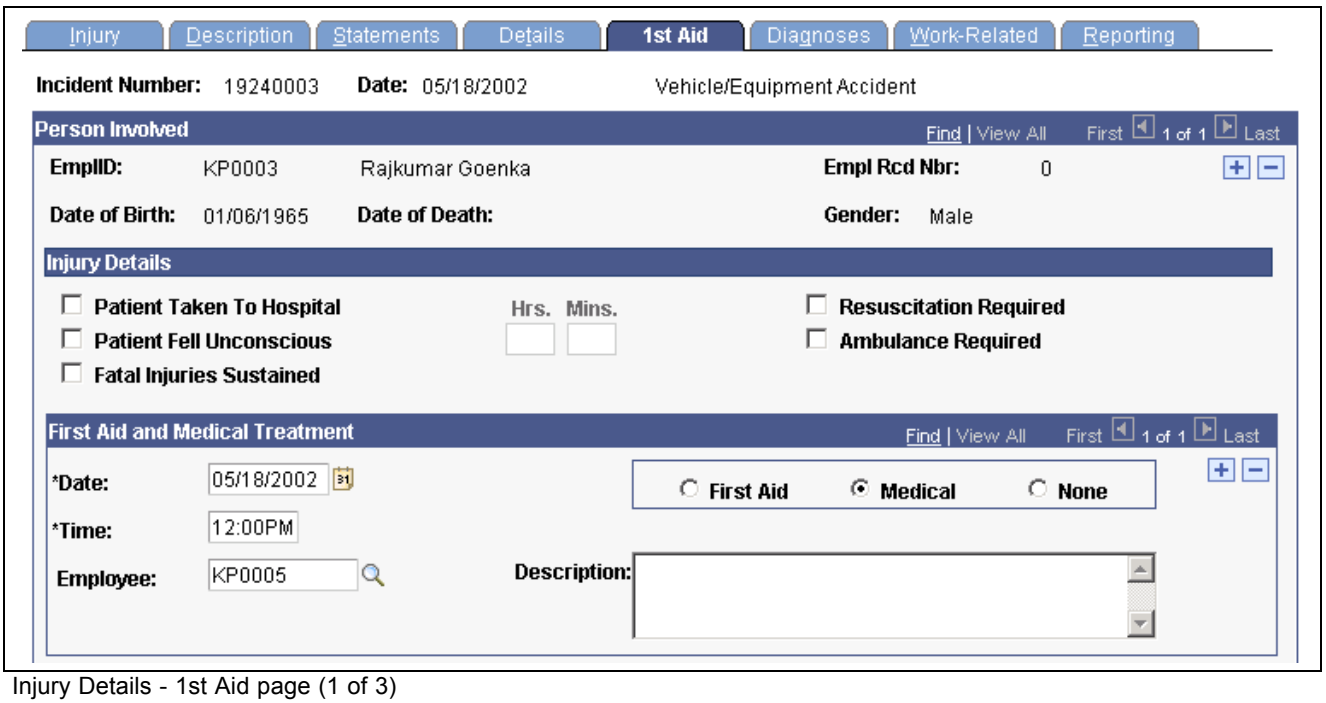
Protective Clothing Identify the employee's protective clothing at the time of the incident. Insert a new data row for more entries.

(GBR) United Kingdom

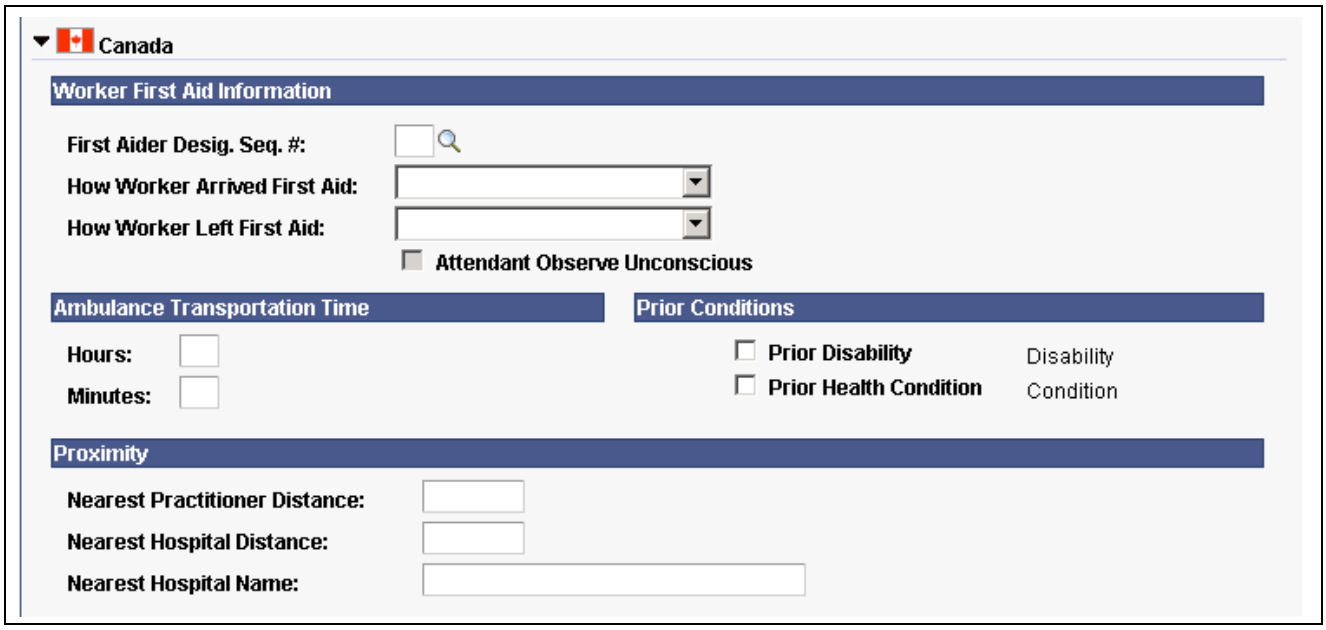
Height of Fall If the individual was involved in a fall, enter the height of the fall in meters.

Entering Medical Treatment Information

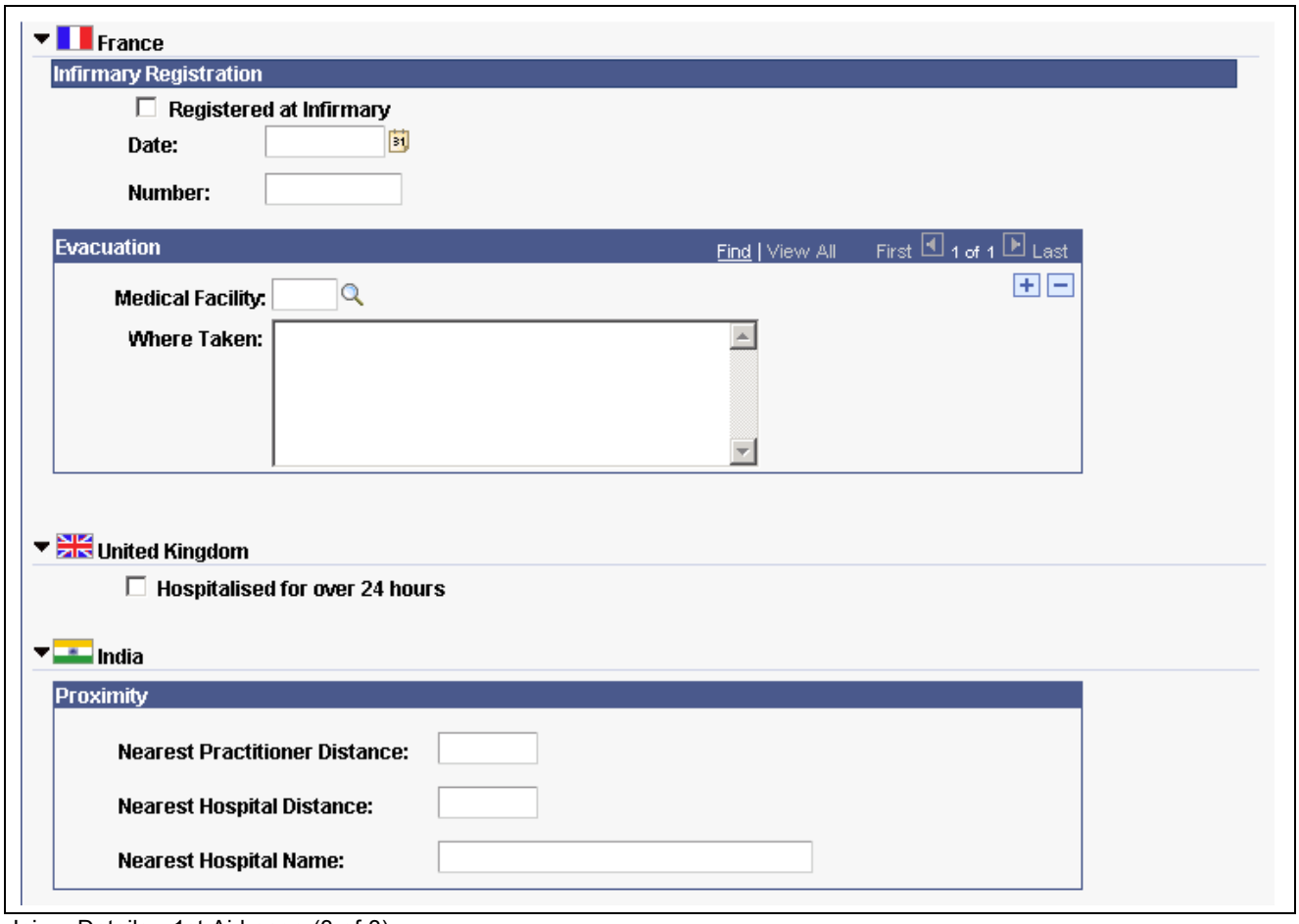
Access the Injury Details - 1st Aid page.



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



Injury Details - 1st Aid page (2 of 3)



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

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, ensure that the primary outcome on the incident description page is death, and enter the date of death in the Workforce Administration business process 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 who provides 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 Desig 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 that was used to bring the injured or ill worker to the designate.

How Worker Left First Aid Select the mode of transportation was 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 was 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 it is 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. 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 the 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

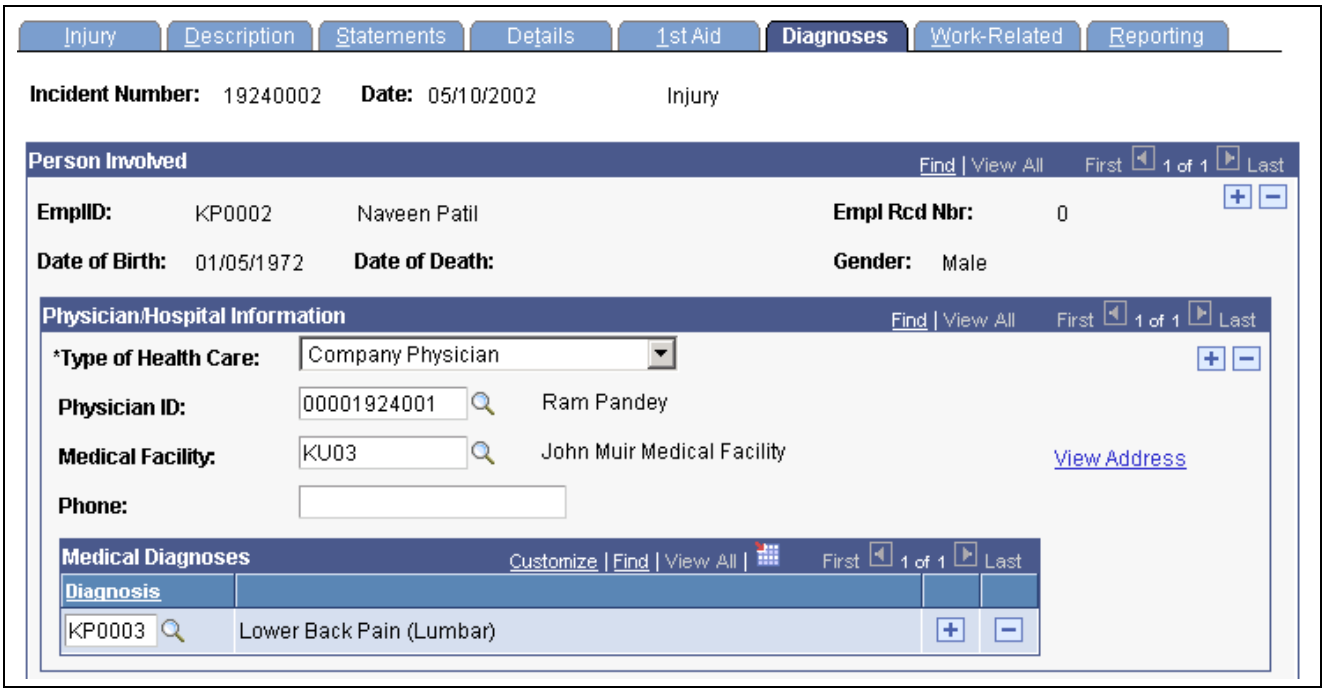
Nearest Practitioner Distance — Enter the distance from the establishment to the nearest medical practitioner at the time of the injury.

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

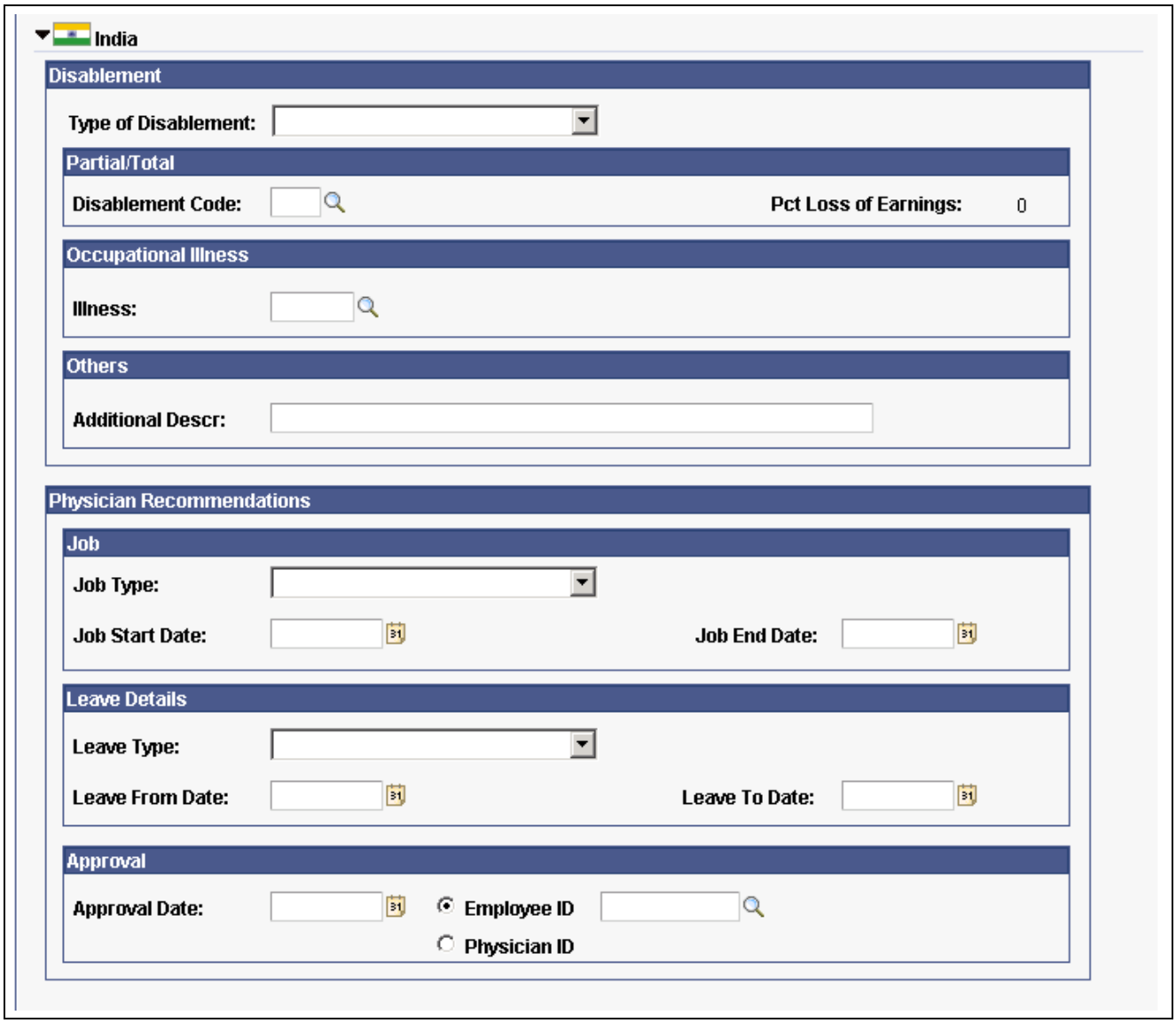
Nearest Hospital Name — Enter the name of the nearest hospital at the time of the injury.

Recording Diagnoses Details

Access the Injury Details - Diagnoses page.



Injury Details - Diagnoses page (1 of 2)



Injury Details - Diagnoses page (2 of 2)

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.

View Address Click this link to access the Injury Details - Diagnoses: Medical Facility Address page. This page is read-only. Use the Medical Facility page (HS_MEDICAL_FAC) to edit medical facility address information.

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 (India Disablement Types) page.

Pct Loss of Earnings (percent loss of earnings) — The percentage of loss of earnings for the selected disablement code appears. 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 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 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.

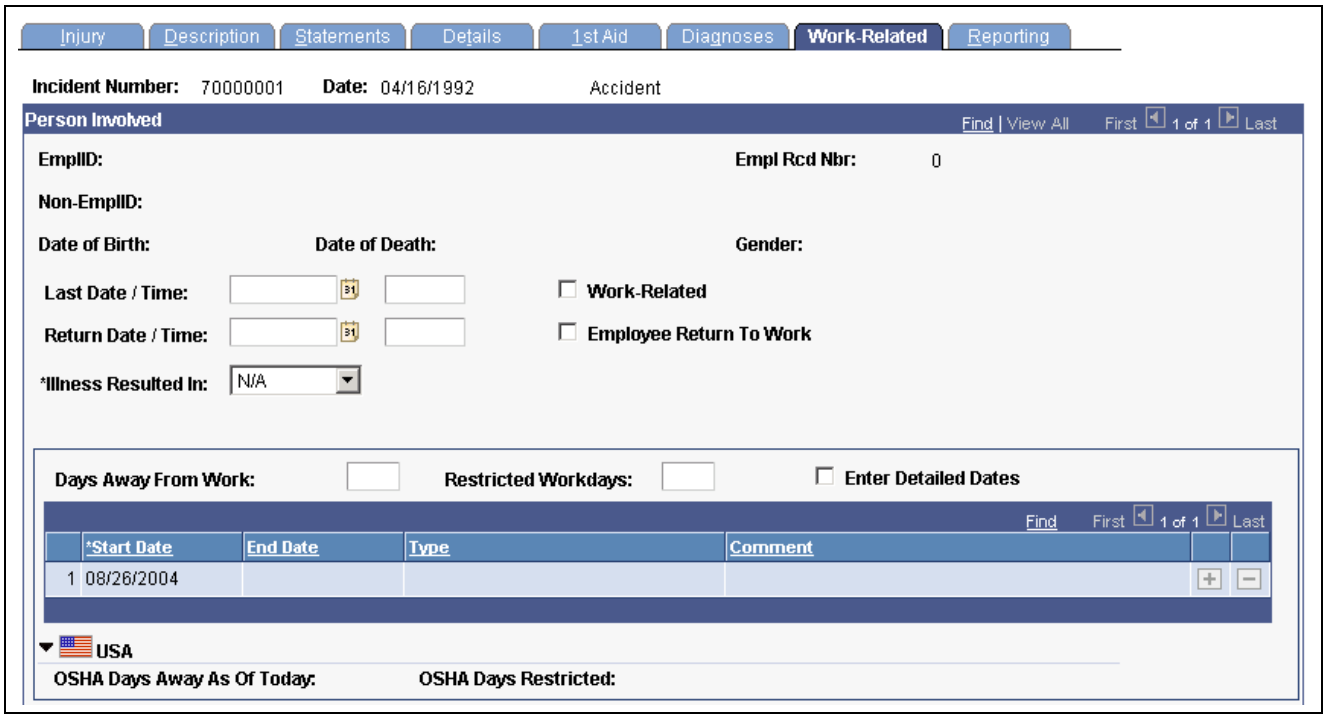
Approval Date — Enter the date that the physician's recommendations are approved.

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

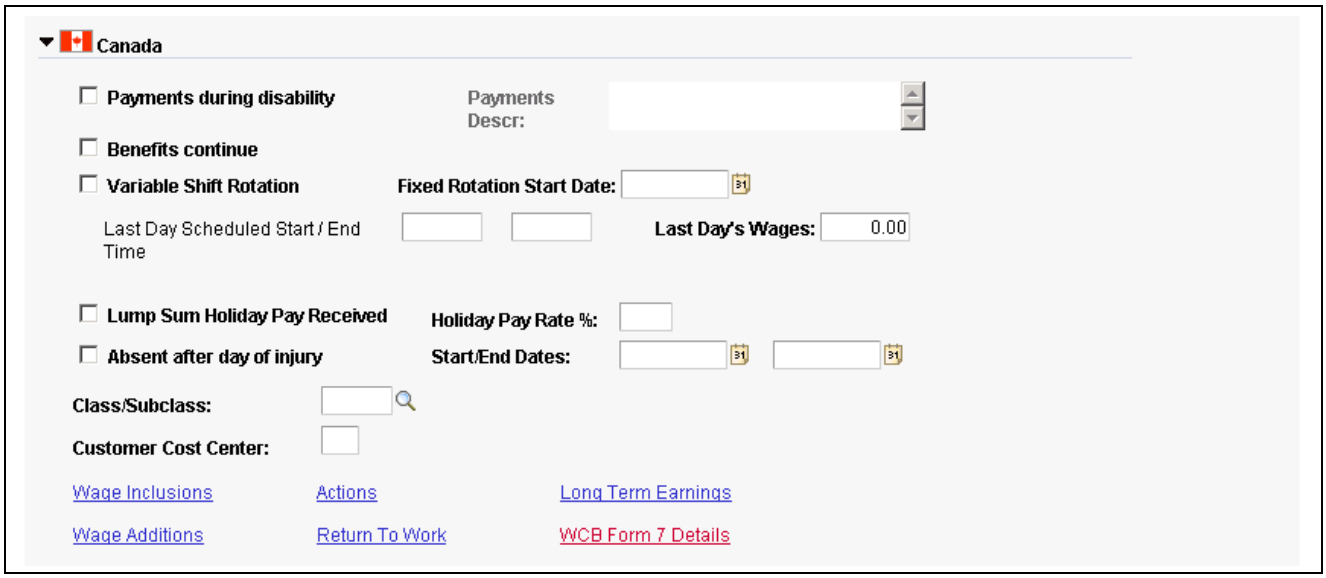
Physician ID — Select if a physician approved the recommendations and select the physician's ID.

Recording Work-Related Incidents

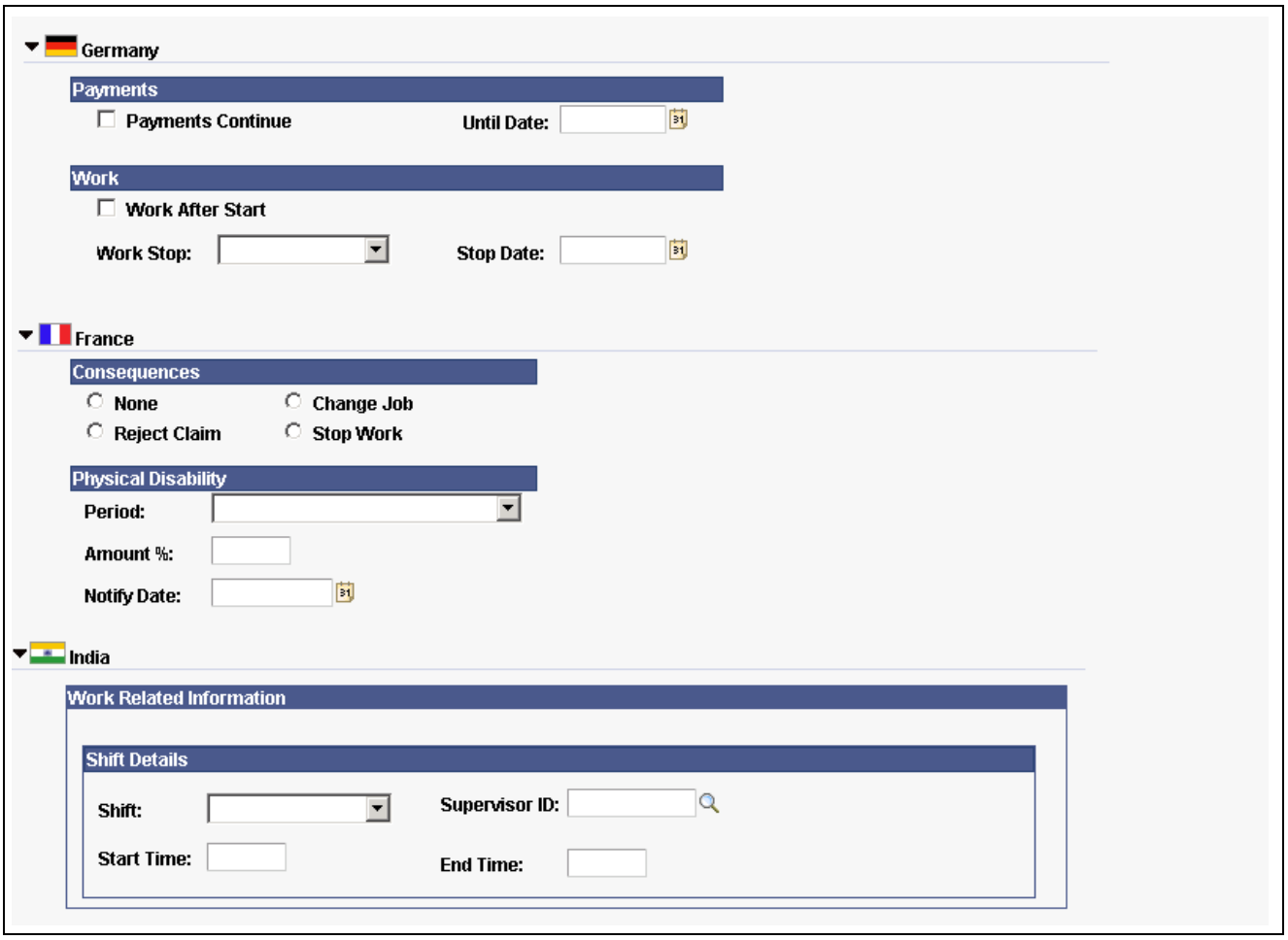
Access the Injury Details - Work-Related page.



Injury Details - Work-Related page (1 of 3)



Injury Details - Work-Related page (2 of 3)



Injury Details - Work-Related page (3 of 3)

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

Work-Related Select if the incident is 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 is 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 the regulatory region.

Enter Detailed Dates Select this check box to enable entry of detailed dates. If the box is cleared, only the Days Away From Work and Restricted Workdays fields are editable and the detailed dates grid is not editable. When the box is selected, the detail dates grid is editable and the Days Away From Work and Restricted Workdays fields are automatically updated to show the total days from the detail dates.

Type Select from the available options to provide more detail about the time away from work due to an injury. The Days Away from Work and the Restricted Workdays are automatically updated depending on the that is selected. For example, if the type is *'Away from Work Due to Injury*, the Days Away from Work field is automatically updated with the number of days entered in the Start and End dates.

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 is able to work within limitations that a doctor established.

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 *Transfer, Termination,* or is *N/A* (not applicable).

(CAN) Canada

Payments during disability Select if the employee is receiving payments and then describe the payments in the Payments Descr (Payments Description) 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 returns 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 % (holiday pay rate percent) 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 the 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 WBC in conjunction with the employer and helps to track claim costs at a given organizational level.

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

(CAN) Canada

This table lists the required fields for British Columbia users:

Incident Outcome	Required Fields
Reported only.	Last Day's Wages.
	Class/Subclass.
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 date when the payments stop in the Until Date field.

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

Work Stop — If the employee no longer works for the 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 % (amount percent) — Indicate the estimated degree of disability, which is determined by a doctor or medical specialist.

Notify Date — Enter the date that the employer is notified regarding the employee's disability.

(IND) India

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

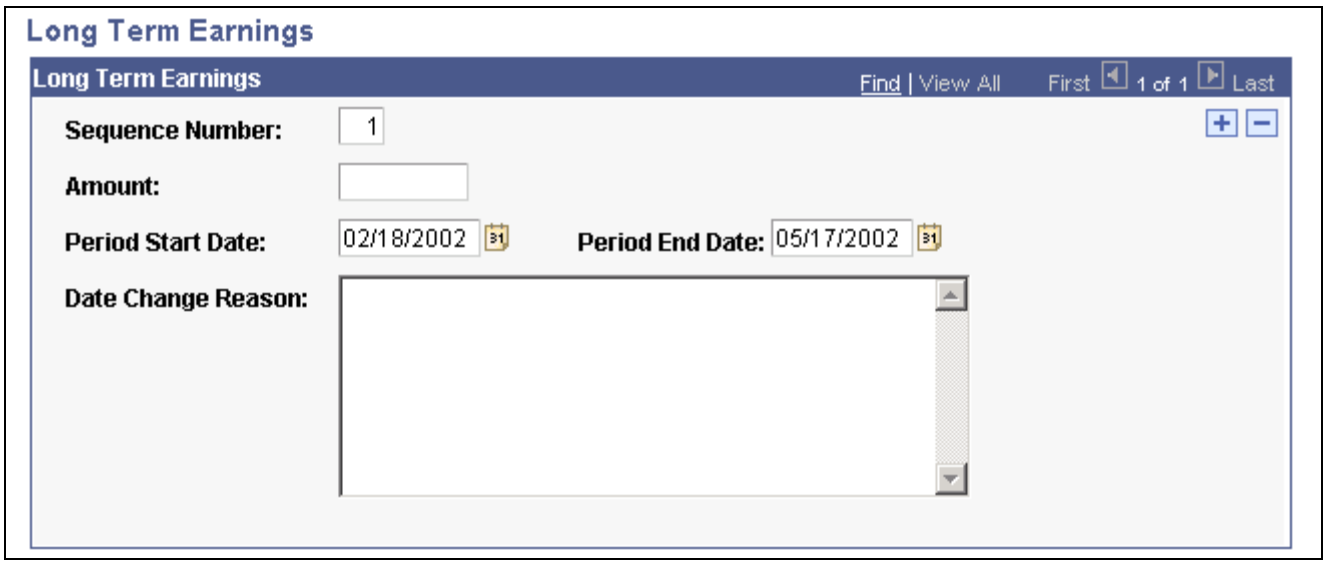
For example, if the organization has a day shift and a night shift, you can use *Shift One* for the day shift and *Shift Two* for the night shift. If the organization has more than two shifts, you can use *Shift Three,* depending on the timing of the shift.

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.



Injury Details - Work-Related: Long Term Earnings page

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

Sequence Number In the records that are on this page, the dates appear by default to three months prior to the injury for sequence number *1* and 12 months prior to the injury for sequence number *2*.

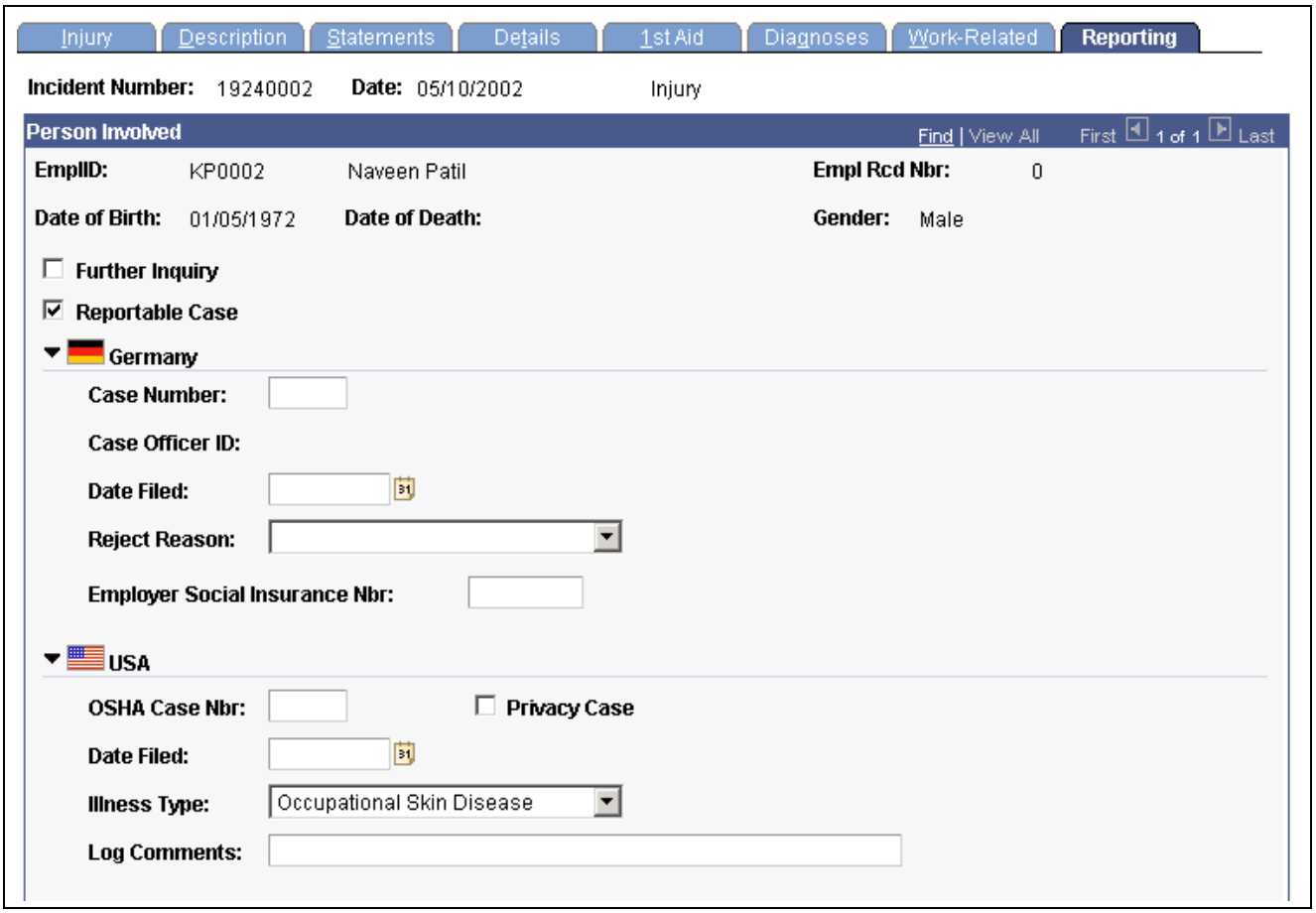
Amount Enter the amount of earnings for the periods that are in each sequence.

Period Start Date and **Period End Date** If the person is not with the organization for either the entire three-month period or the entire twelve-month period, enter the period start date and the period end date.

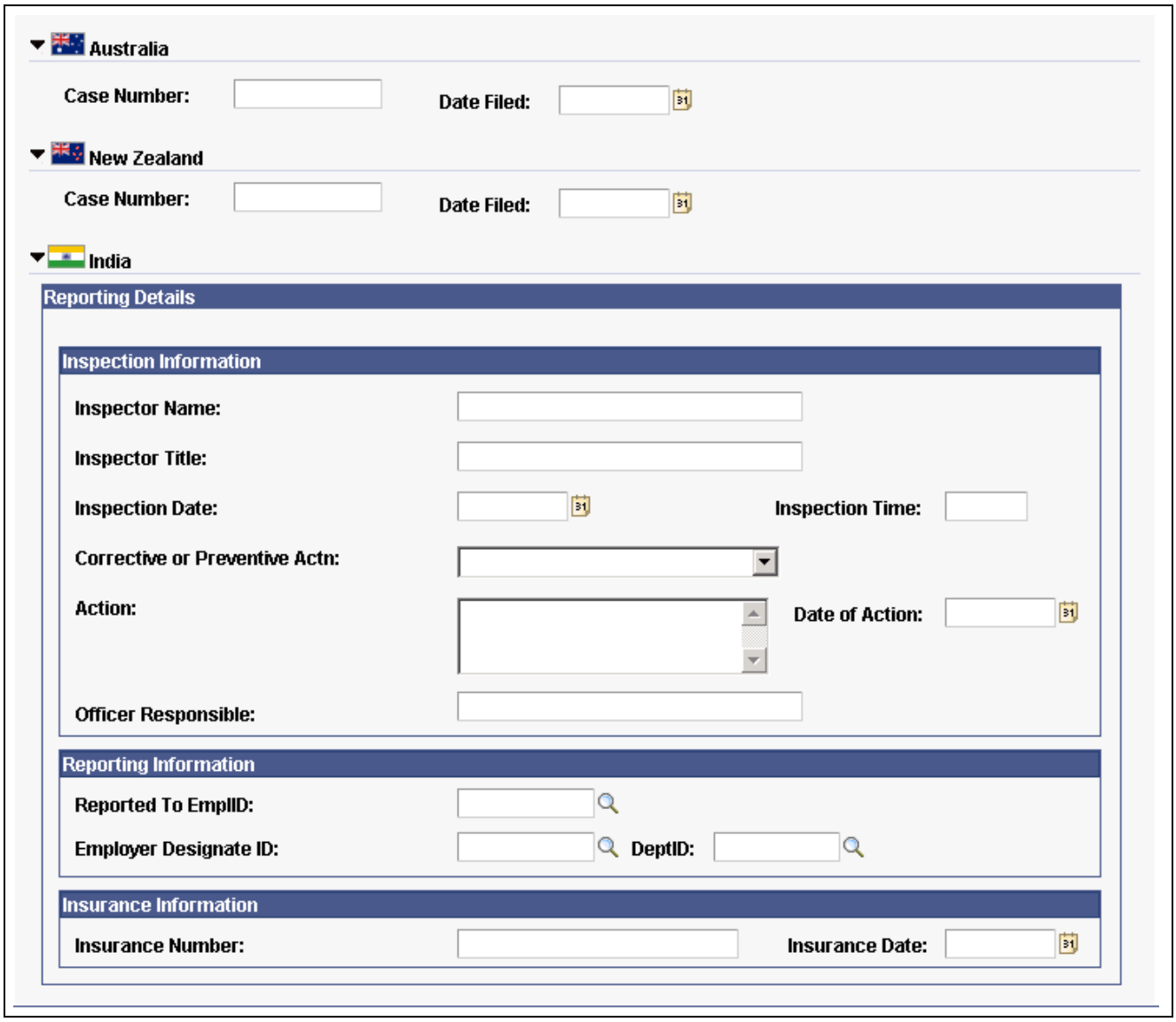
Date Change Reason When you enter period start and end dates, you must provide a reason for the date changes.

Tracking Reporting Details

Access the Injury Details - Reporting page.



Injury Details - Reporting page (1 of 2)



Injury Details - Reporting page (2 of 2)

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 the location for tracking reportable cases, you can track whether the case is reportable based upon insurer requirements or the requirements of the organization.

If you do not need to report this particular case based upon the requirements for the regulatory region, the insurer, or the 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 the users to do it the same way.

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

Case Officer ID The case officer ID from the Details DEU - Job Data page (for the person who is involved in the incident). Case officers are set up for particular setIDs and locations using the Case Officers page. Individuals are designated as case officers on the Employee Details page. Case officers are assigned to individuals who are involved in incidents by using the Details DEU - Job Data page.

Date Filed Enter the date that the report is filed with the insurer. This information is used in the DEU accident report.

Reject Reason Select any reason that the insurer gave for rejecting the claim, if applicable.

(USA) United States

OSHA Case Nbr (occupational safety and health case number) Enter the case number; the system uses it in the OSHA 200 Occupational Injury and Illness report (OHS001).

Privacy Case Select to mark the incident as private. This is to comply with an OSHA requirement. Private cased do not display the employee's name on any reports but maintain the name in the system in case it is requested by OSHA.

Date Filed Enter the date that the reportable case is 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 that are exactly the length of the field as it appears on the page. This length matches the length for comments on the OSHA Form 200 Injury and Illness Recordkeeping Log.

(AUS) Australia

Case Number Enter the case number.

(NZL) New Zealand

Case Number Enter the case number.

(IND) India

Inspector Name Enter the name of the person who is 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 (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 who is responsible for the completion of the corrective or preventive action.

Reported to Empl ID(reported to employee ID) Select the ID of the employee to whom the injury is reported.

Employer Designate ID Enter the ID of the person in the 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 Incident Data for Vehicles and Equipment

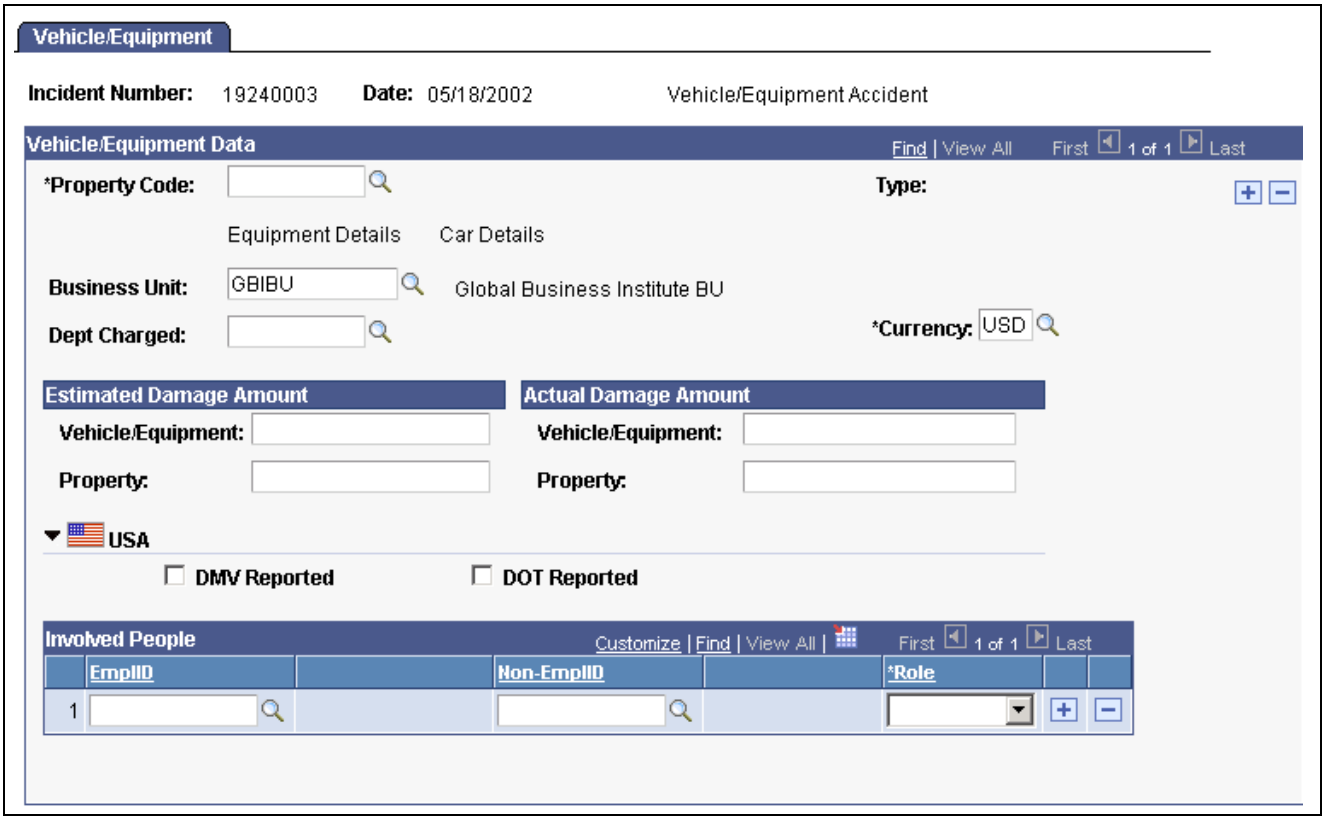
This section discusses how to enter incident data for vehicles and equipment.

Pages Used to Enter Incident 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, Vehicle/Equipment	Enter the specifics of incidents involving vehicle or equipment accidents. You must create the incident and assign 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 Incident Data for Vehicles and Equipment

Access the Vehicle/Equipment page.



Vehicle/Equipment page

Property Code Select a property code from the values that you classify as vehicles or heavy equipment in the Company Property table.

For vehicles, the Car Details link is available. For heavy equipment, the Equipment Details link is available. Click the links for the associated pages.

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

Estimated Damage Amount Enter an estimated damage amount for the vehicle or equipment and any other property that is damaged in the incident, if an estimate is provided.

Actual Damage Amount Enter an actual damage amount for the vehicle or equipment and any other property that is damaged in the incident, when that information is known.

(USA) USA

DMV Reported(Department of Motor Vehicles reported) Select if the incident is reported to the state Department of Motor Vehicles.

DOT Reported(Department of Transportation reported) Select if the incident is reported to the federal Department of Transportation.

EmplID (employee ID) and **Non-EmplID** (non-employee ID)	Identify the employees or non-employees that are associated with the vehicle or heavy equipment that is involved in the incident.
Role	Indicate the role of each person that is involved in the accident.

Tracking Consequent Actions of Incidents

This section provides an overview of the methods that you can use to document consequent actions of incidents and discusses how to:

- Enter corrective actions.
- Enter preventative actions.

Methods of Documenting Consequent Actions

You can use the Consequent Actions (HS_INCIDENT_ACTION) component to manage a health and safety program in one of three ways:

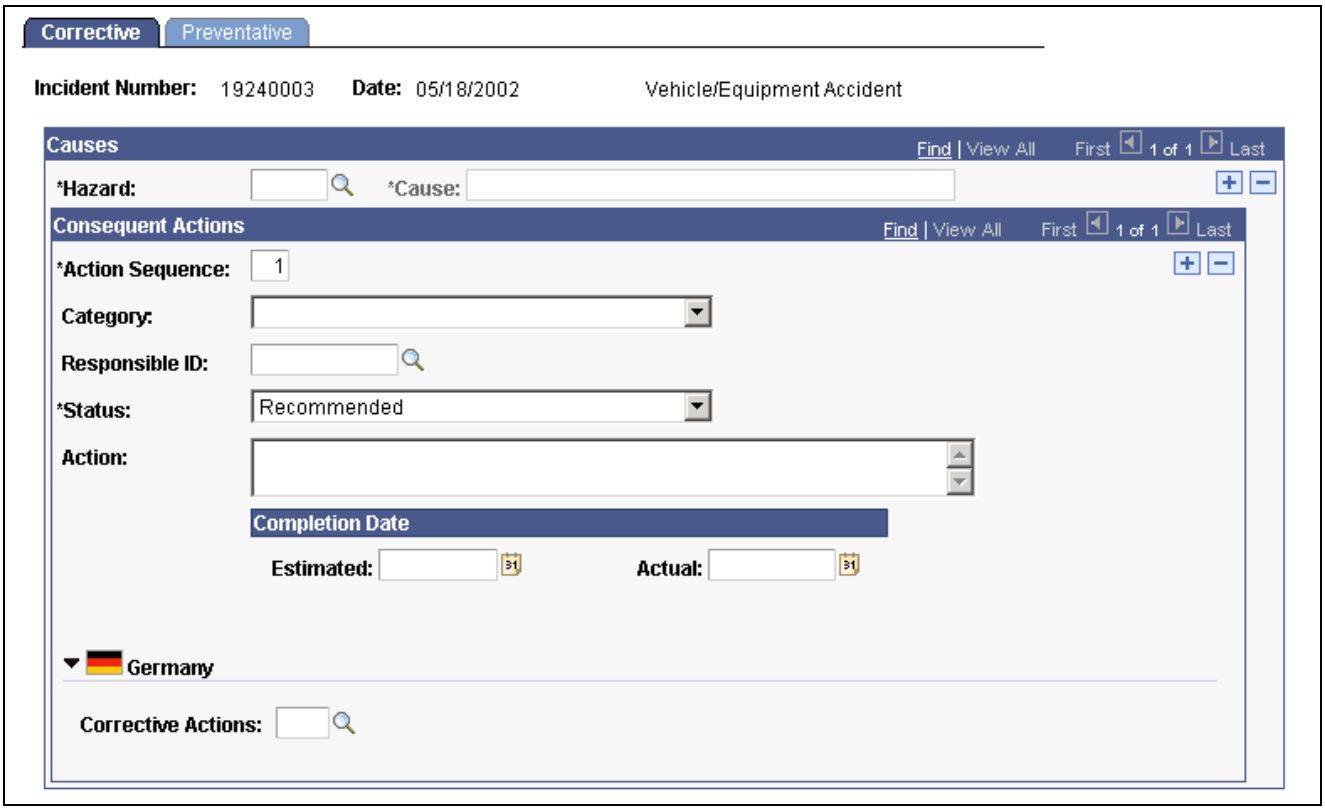
- Document the causes, corrective actions, and preventative actions that are associated with a health and safety incident.
- Document the efforts at preventative hazard control.
- Document the corrective and preventative actions that you implemented as a result of the analysis of hazards that are associated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

Pages Used to Track Incident Consequent Actions

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

Entering Corrective Actions

Access the Corrective page.



Corrective page

Hazard Select a code from the values that come from the Hazardous Materials/Conditions table. The value that is associated with the selected hazard appears in the Cause field.

Action Sequence The system automatically assigns the action sequence in numerical order for each data row that you insert.

Category 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, actual, or both completion dates for carrying out the action.

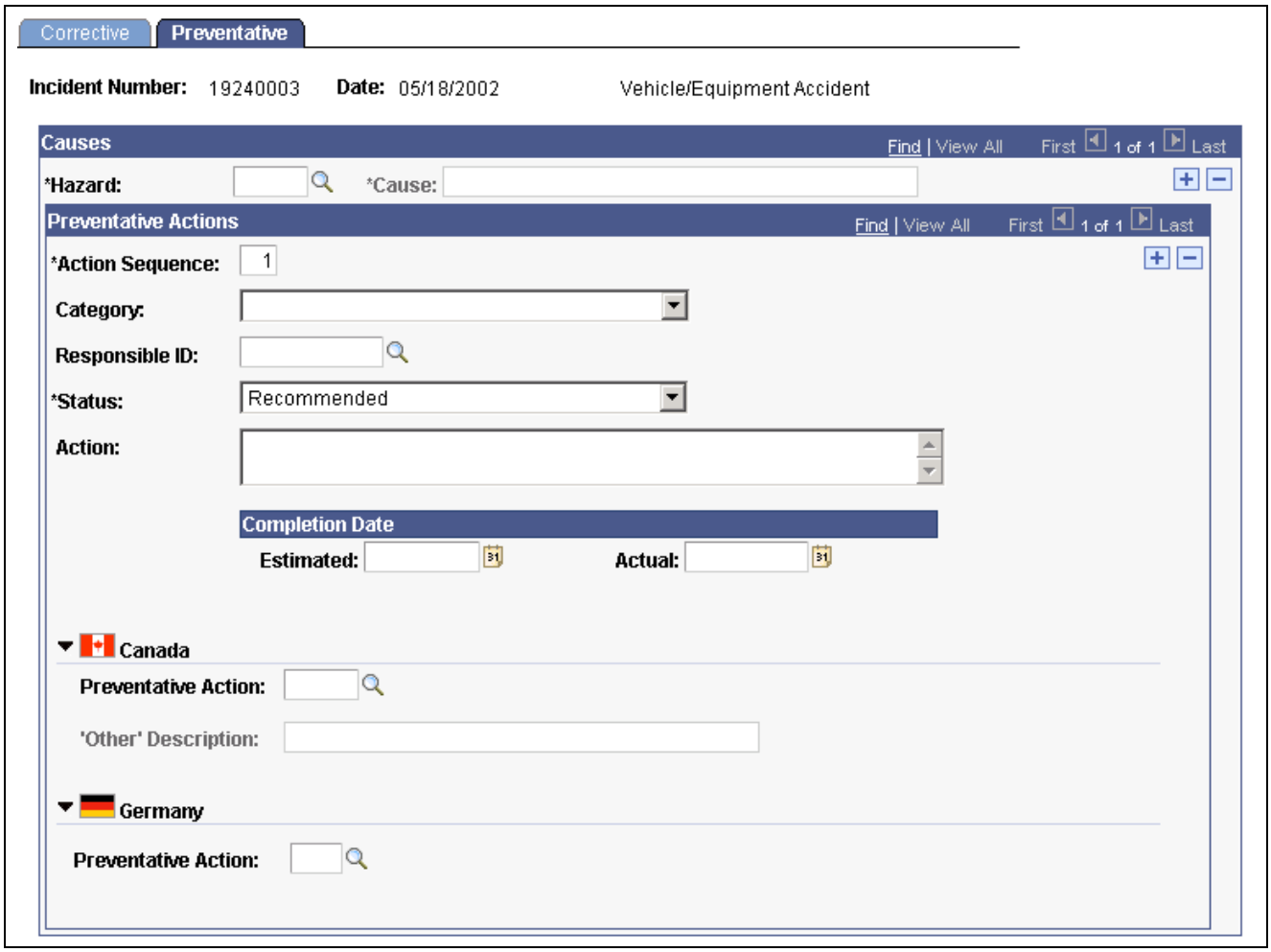
Note. (CAN) For users in British Columbia who report incidents to the BC WCB electronically, the required fields for the Corrective Actions page are the Hazard Code and the written statement of the Action.

(DEU) Germany

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

Entering Preventative Actions

Access the Preventative page.



Preventative page

Causes

The fields in this group box are identical to those that are on the Corrective page.

(CAN) Canada

Preventative Action For each action, select the appropriate code from the values that 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 that are 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 is 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

This section discusses how to view employee injury summaries. This information is useful for pinpointing recurring problems that certain employees experience.

See Also

Chapter 5, "Creating and Tracking Incidents," Entering Injury and Illness Details, page 73

Prerequisites

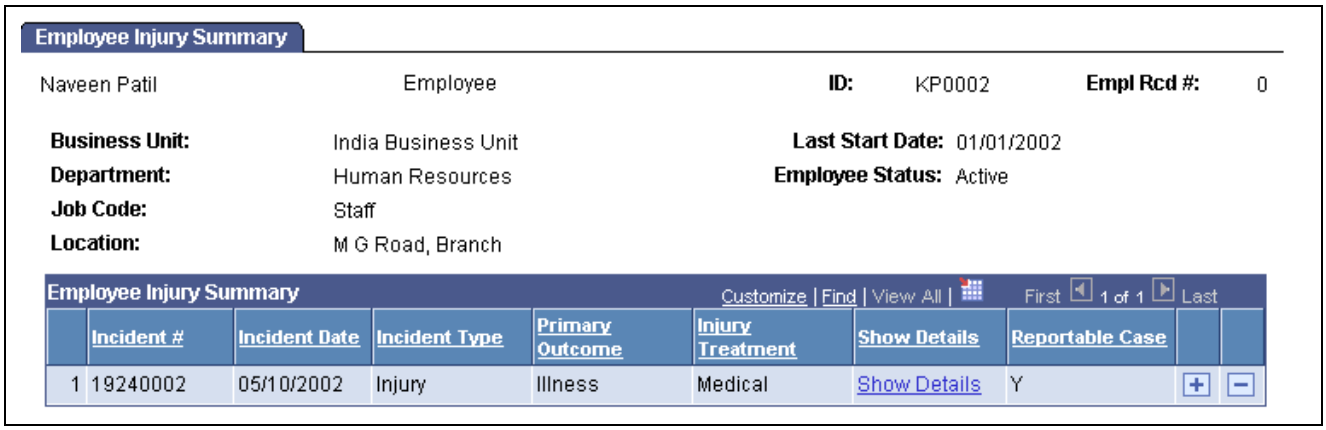
Before you can access injury and illness data by individual, you must first create incident data and associate individuals with the incident by using the Incident Details (HS_INCIDENT) component.

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, Employee Injury Summary	View a summary of all the injuries that 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 that is suffered by each person who is involved in the incident. This page is helpful when you do not have the incident number at hand.

Viewing Employee Injury Summaries

Access the Employee Injury Summary page.



Employee Injury Summary page

Show Details Click to access the Incident Details component for a selected incident. Review and update injury or illness information and the pages that are in the Incident Details component.

Save the changes before you close the pages.

(GBR) Collecting RIDDOR Data for UK reports

This section provides an overview of collecting RIDDOR data and lists the page used to run the Collect RIDDOR Data (OHS501UK) SQR process.

Understanding the Collect RIDDOR Data Process

The Collect RIDDOR Data process builds a data collection for reporting. You must enter either a date range or a manager to run the report, and you can (optionally) request data for a single incident. This process is run prior to requesting the following reports:

- UK F2508 (injury/dangerous occurrences).
- UK F2508A (illness).

Page Used to Run the Collect RIDDOR Data Process

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.

(MEX) Defining Mixed Committees for Mexico

This section provides an overview of mixed committees for health and safety and discusses how to define mixed committees.

Understanding Mixed Committees for Health and Safety

In Mexican companies, a mixed committee, *Comisión Mixta de Seguridad e Higiene*, is formed to oversee health and safety processes and investigate work-related accidents. A similar mixed committee, *Comisión Mixta de Capacitación*, 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. When the committee is formed, the group defines its working objectives, functions, and mechanisms.

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.

After you define the details for a health and safety mixed committee, there is an additional step. If a safety incident occurs on the job, 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 that is related to the mixed committee and its formation (STPS Form DC-1).

Submit the committee formation and definition of the training plan to the STPS through Form DC-2.

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

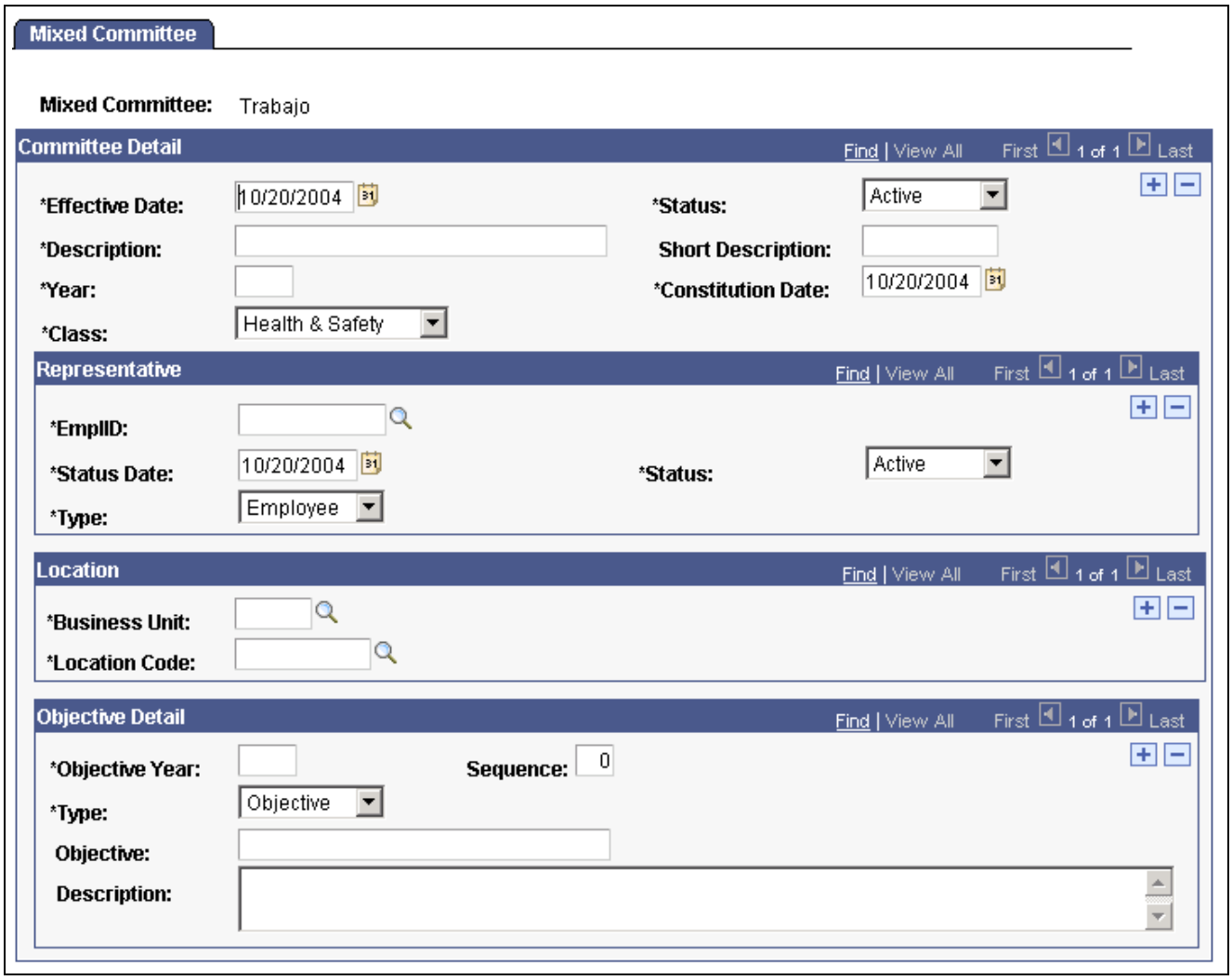
You can now generate all the STPS reports that are used to track employee training.

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 Mixed Committee	Define details for the mixed committee, including class, representatives, location, and objectives.

Defining Mixed Committees

Access the Mixed Committee page.



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 is 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 it 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 objective type.

CHAPTER 6

Processing Rehabilitation, Claims, and Examination Data

This chapter discusses how to:

- Manage claims.
- Track rehabilitation plans.
- Track employee medical exam results.

Managing Claims

This section provides an overview of claims management and reports and discusses how to:

- Open claims.
- Enter claim details.
- Track claim charges.
- Enter claims payment information.
- Enter provider reference data.

Understanding Claims Management

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, you might not learn about an incident until someone files a claim against the organization. You create the claim first. Later, as you learn more about the incident and enter incident details in 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 is required on the Claims Management pages for all incident outcome types except *Dangerous Occurrence.*

Claims Reports

You can generate these claims reports:

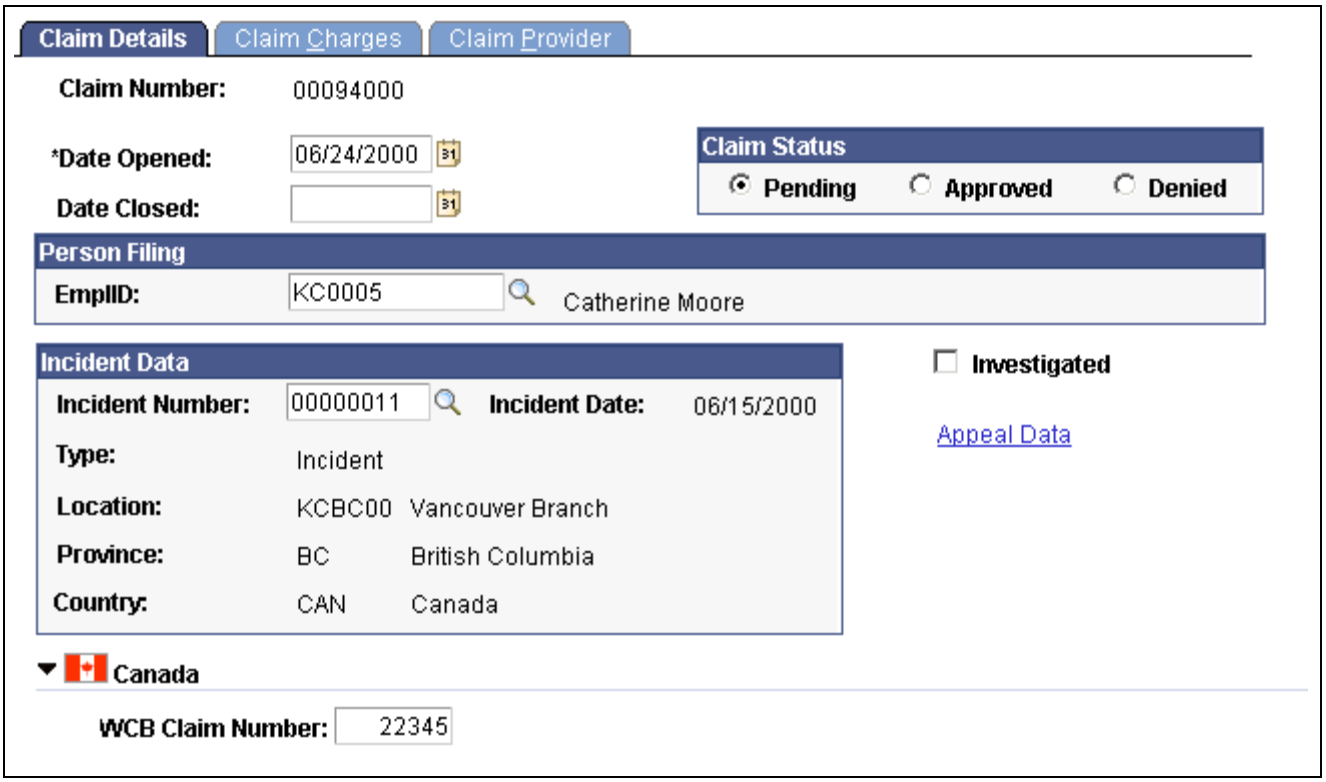
- OHS015, Incident Claim Detail report.
- OHS012, Claim Summary Overview report.

Pages Used to Manage Claims

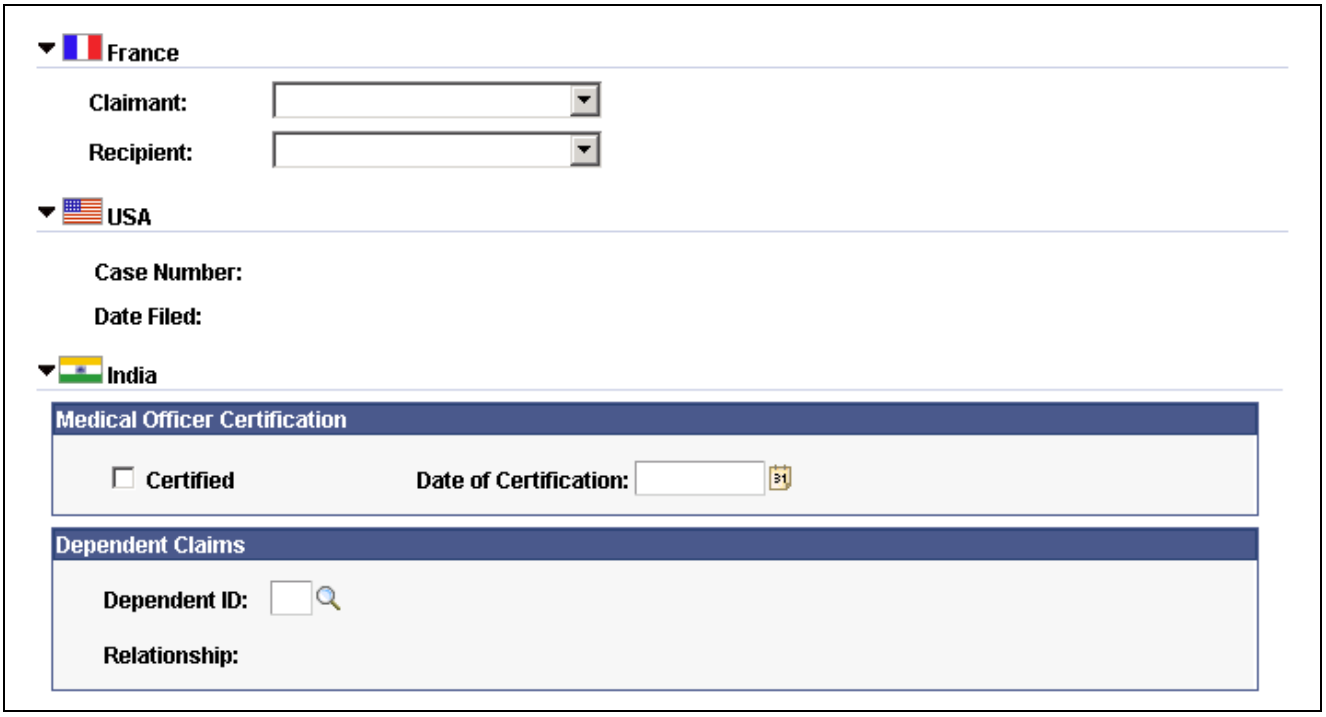
Page Name	Object Name	Navigation	Usage
Claim Details	HS_CLAIM_MGMT1	Workforce Monitoring, Health and Safety, Obtain Incident Information, Open Claim, Claim Details	Open claims.
Claim Details: Appeal Details	HS_CLAIM_APPL_SEC	Click the Appeal Data link on the Claim Details page.	Enter details about the claim appeal.
Claim Charges	HS_CLAIM_MGMT2	Workforce Monitoring, Health and Safety, Obtain Incident Information, Open Claim, Claim Charges	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, Claim Provider	Enter provider reference data, the claim assessment date, and its disposition.
Payments and Deposits	HS_CST_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.



Open Claim - Claim Details page (1 of 2)



Open Claim - Claim Details page (2 of 2)

Warning! To avoid maintaining two different sets of claim numbers, PeopleSoft recommends 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 claim 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 is opened appears. By default, this is the current date, which you can change if needed.

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 is investigated.

Incident Data

Incident Number Select an incident number to associate with the claim. The system prompts you only with incidents that are associated with this individual. When you enter the incident number, the incident date, type, location, state and country appear on the page.

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 is 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 appear in read-only mode.

(IND) India

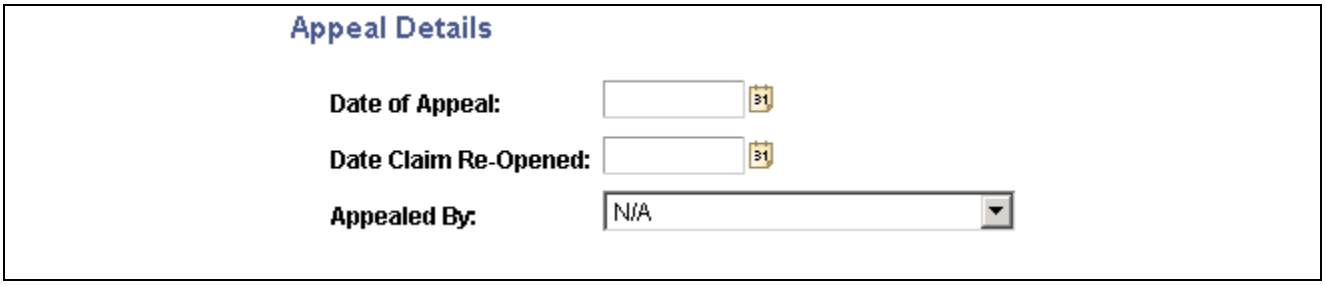
Certified Select if a medical officer has certified the claim.

Date of Certification Enter the date of certification.

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

Entering Claim Details

Access the Open Claim - Claim Details: Appeal Details page.



Open Claim - Claim Details: Appeal Details page

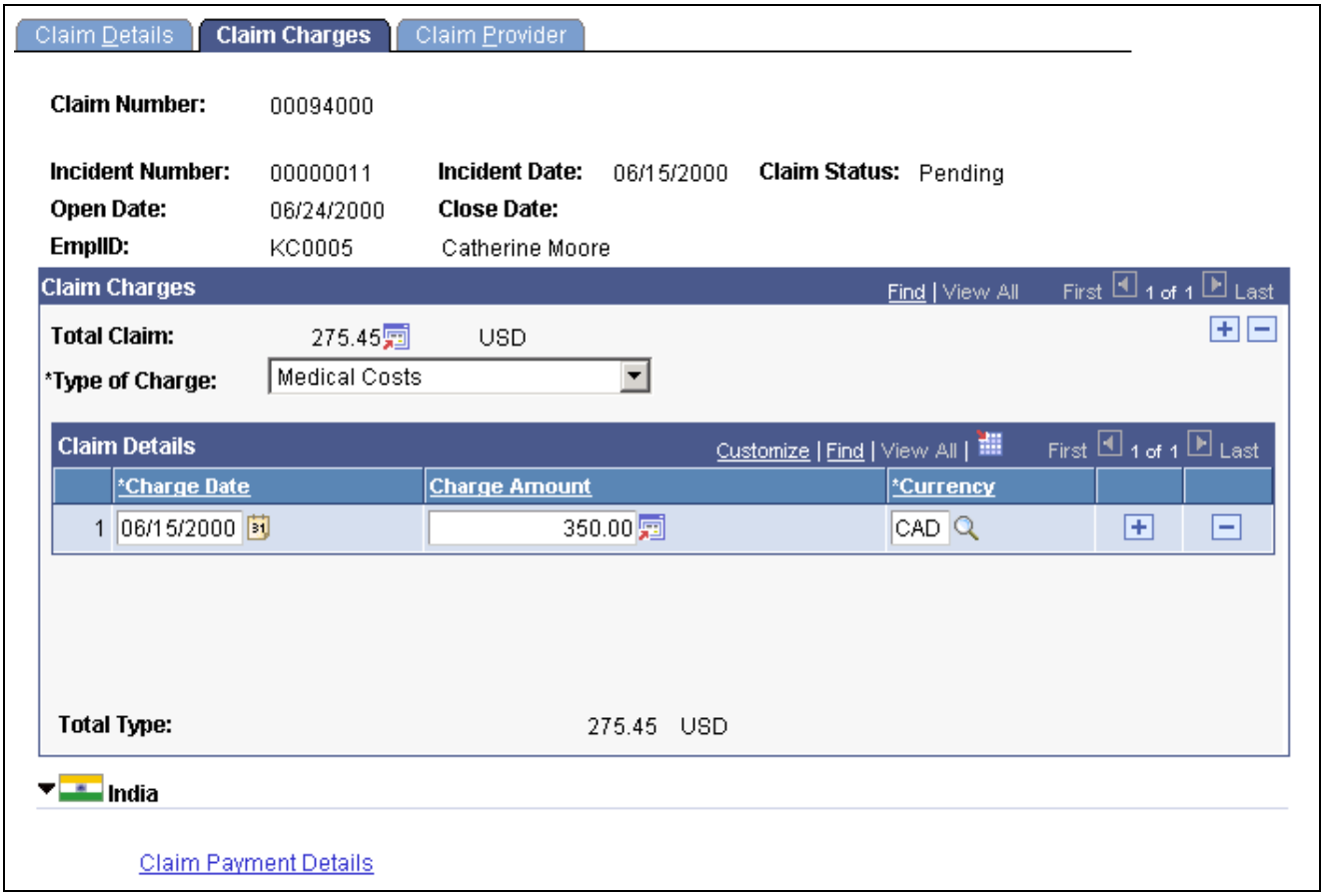
Date of Appeal Enter the date on which the appeal is filed.

Date Claim Re-Opened Enter the date on which the claim is 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.



Open Claim - Claim Charges page

Claim Charges

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

Type of Charge Select one: *Medical Costs, Other Costs,* or *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.

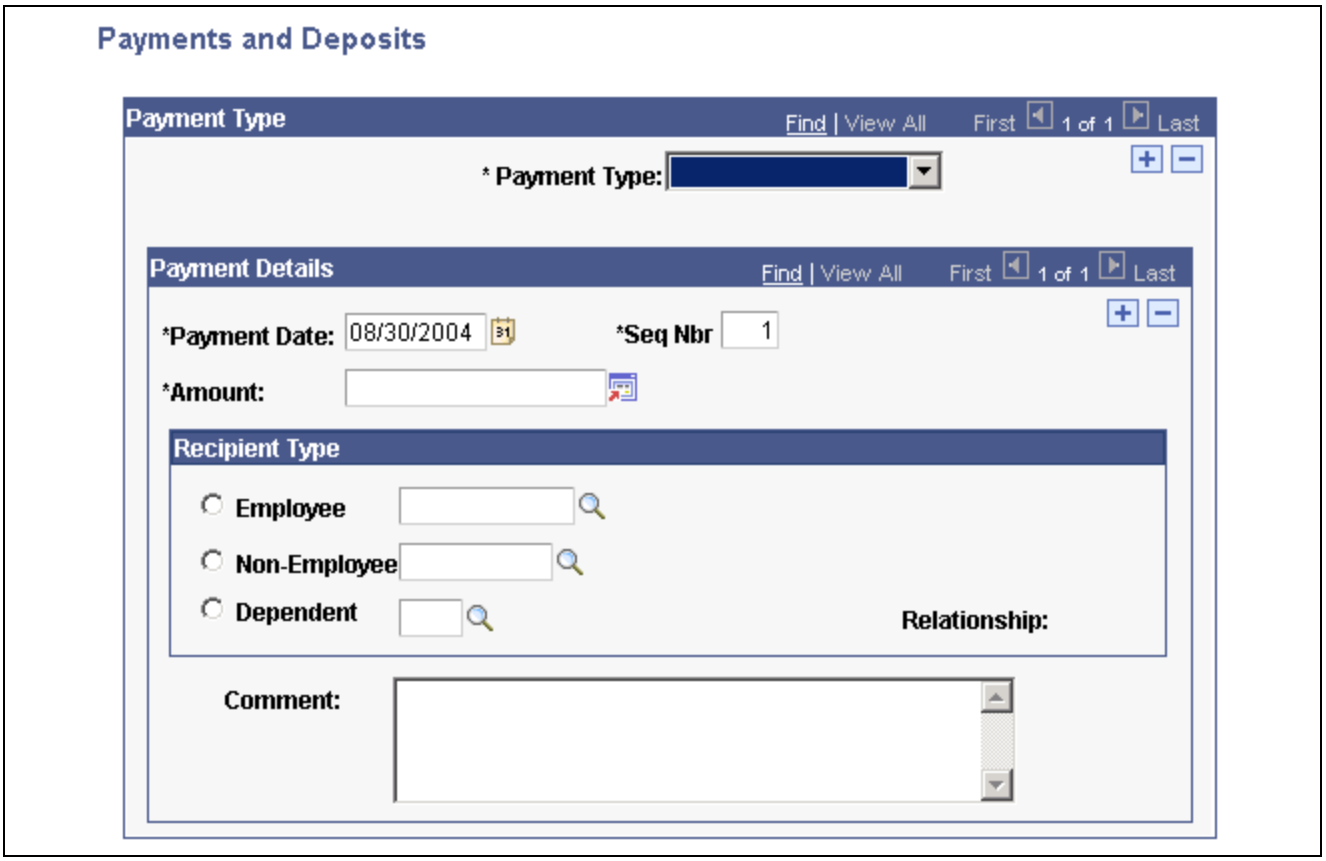
Total Type The total charges for this claim type in the currency specified for the User ID in the Operator Preferences Table.

(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 Open Claim - Claim Charges: Payments and Deposits page.



Open Claim - Claim Charges: Payments and Deposits page

Payment Type Select if the payment type is *Advance Payment, Claim Deposit, Claim Payment,* or *Provisional Payment.*

Payment Date Enter the payment date.

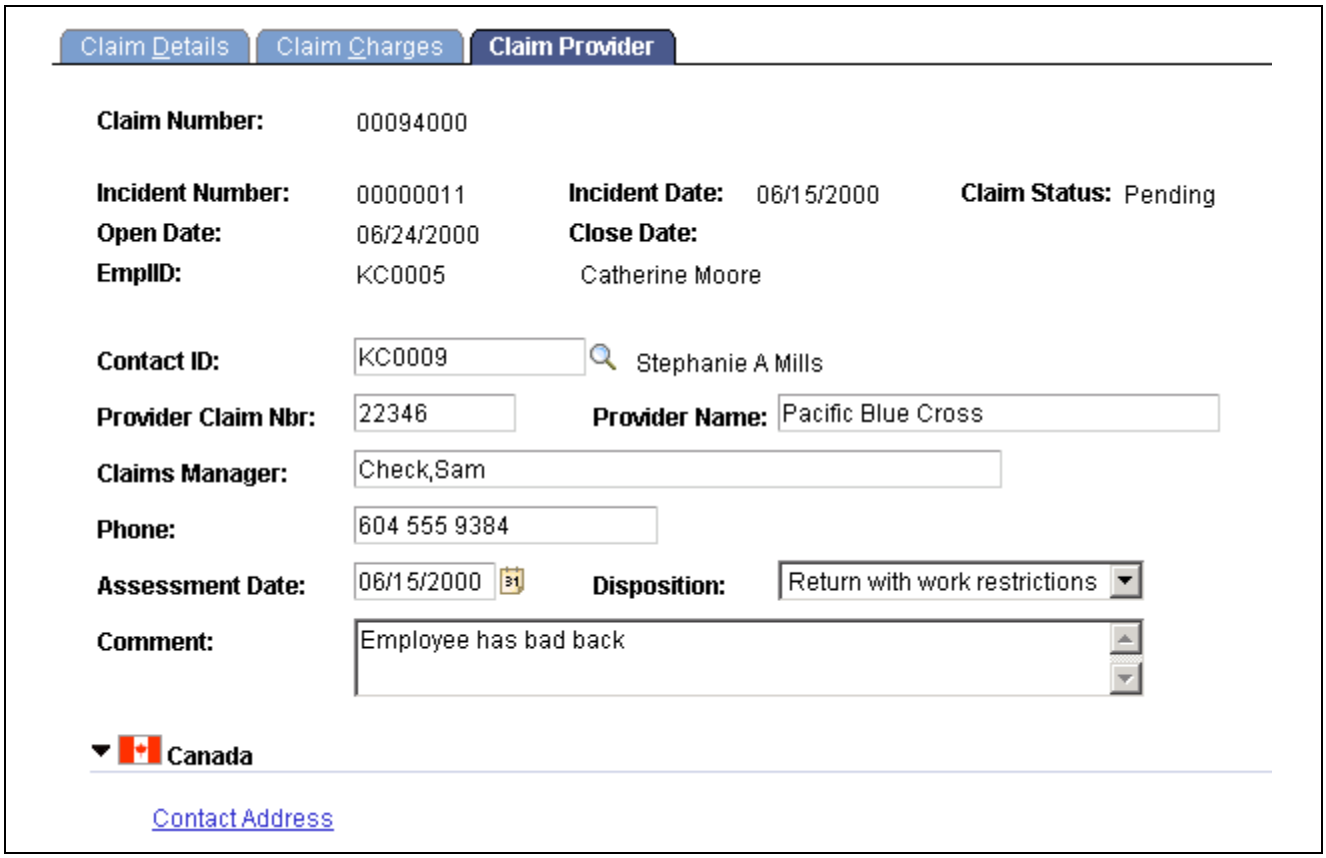
Amount Enter the payment amount.

Recipient Type Select if the recipient of the payment is an *Employee, Non-Employee,* or *Dependent.* Once selected, select the ID of the employee, non-employee, or dependent. If you select *Dependent*, the relationship appears.

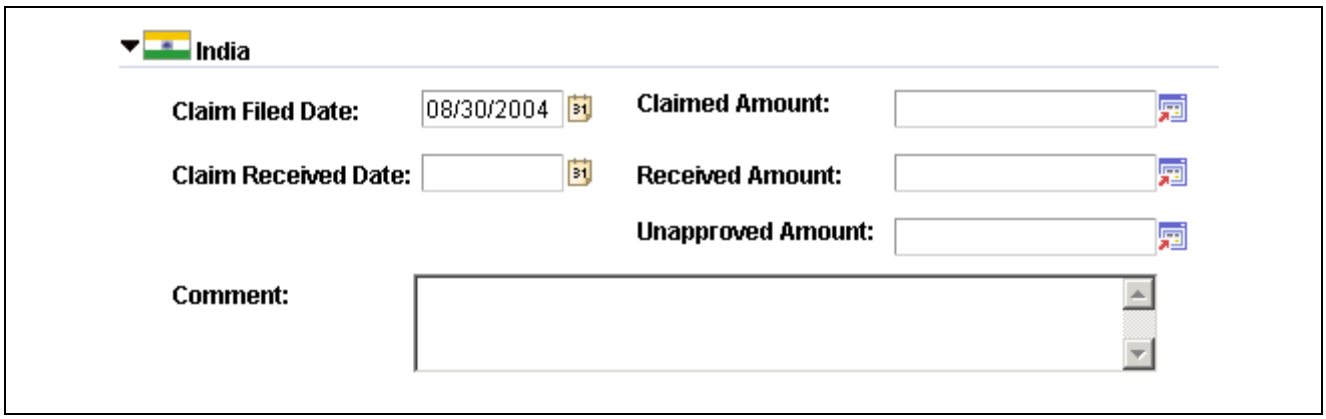
Comment Enter an optional comment about the payment.

Entering Provider Reference Data

Access the Open Claim - Claim Provider page.



Open Claim - Claim Provider page (1 of 2)



Open Claim - Claim Provider page (2 of 2)

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

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

Typical types of providers are government agencies, such as the Workers' Compensation Board of Canada or insurance companies.

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 is filed.

Claimed Amount Enter the amount that is claimed.

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

Received Amount Enter the date that the amount is received.

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

Comment Enter an optional comment.

Tracking Rehabilitation Plans

This section discusses how to:

- Associate an incident and claims data with a rehabilitation plan.
- Monitor work restrictions and duties.
- Track rehabilitation action details.

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

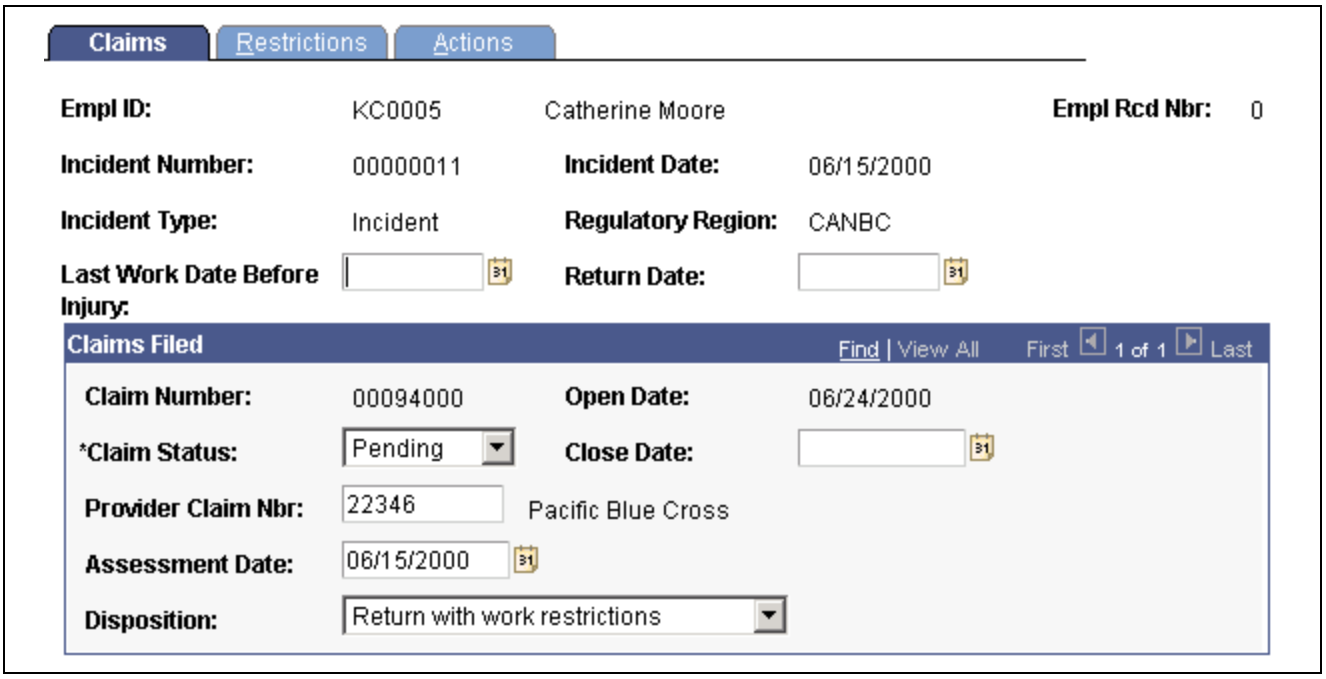
Note. The pages for employee rehabilitation plans and non-employee rehabilitation plans are identical in format and usage.

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 Employee Rehab Plan, Claims	Associate an incident and essential claims data to rehabilitation plan details.
Restrictions	HS_INJ_REHAB2	Workforce Monitoring, Health and Safety, Obtain Incident Information, Create Employee Rehab Plan, Restrictions	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 Employee Rehab Plan, Actions	Track the details of actions taken in the rehabilitation plan.
Claims	HS_INJ_REHAB1	Workforce Monitoring, Health and Safety, Obtain Incident Information, Create Non-Employee Rehab Plan, Claims	Associate an incident and essential claims data to rehabilitation plan details.
Restrictions	HS_INJ_REHAB2	Workforce Monitoring, Health and Safety, Obtain Incident Information, Create Non-Employee Rehab Plan, Restrictions	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 Non-Employee Rehab Plan, Actions	Track the details of actions taken in the rehabilitation plan.

Associating an Incident

Access the Create Employee Rehab Plan - Claims page.



Create Employee Rehab Plan - Claims page

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

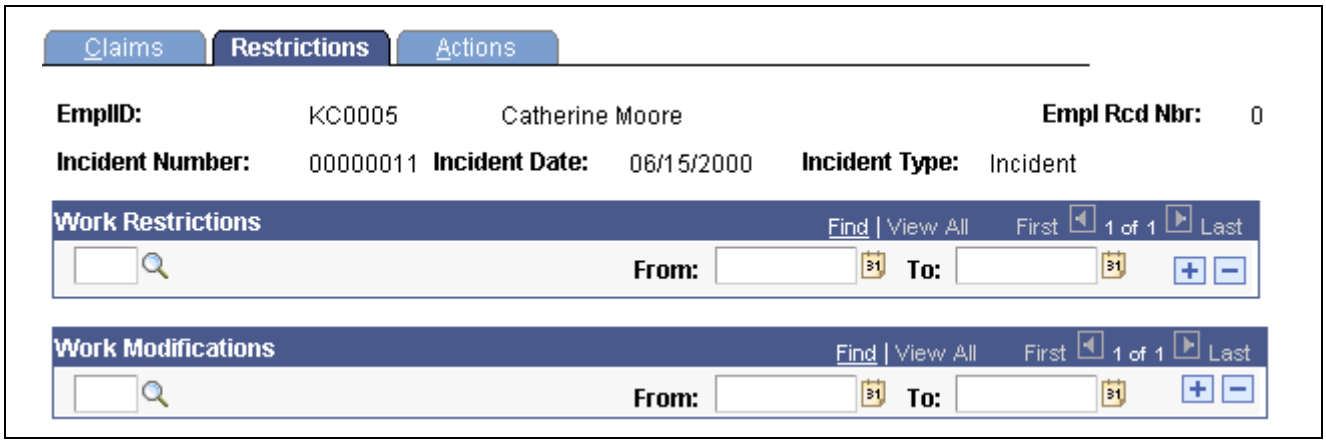
Provider Claim Nbr (provider claim number) Enter the provider claim number.

Assessment Date Enter the assessment date.

Disposition Select from the list of available options.

Monitoring Work Restrictions and Duties

Access the Create Employee Rehab Plan - Restrictions page.



Create Employee Rehab Plan - Restrictions page

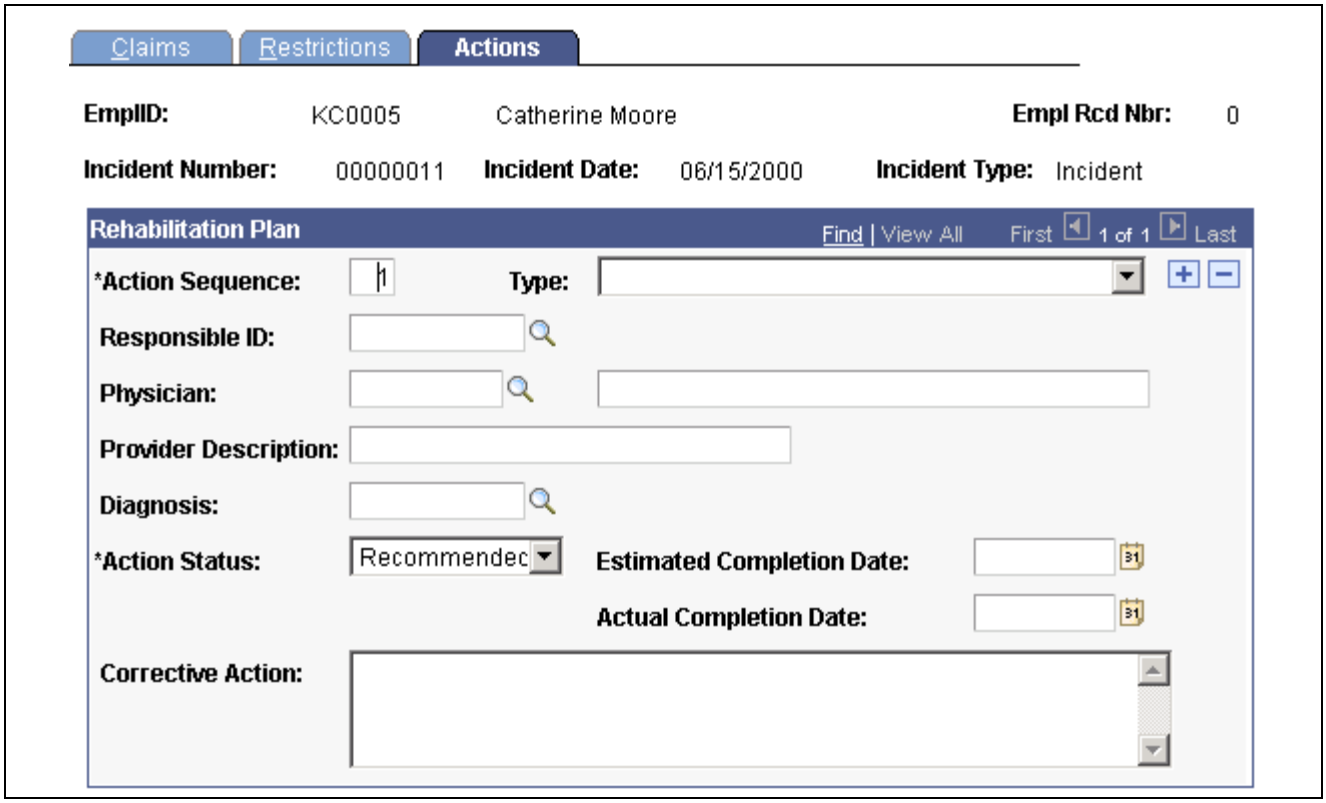
Work Restrictions Select a code for any work restrictions that the employee has as a result of the injury or illness. Create these codes in the Work Restriction Table.

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 Employee Rehab Plan - Actions page.



Create Employee Rehab 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 the 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

This section discusses how to:

- Enter physical examination information.
- Enter physical exam results.
- Enter hearing exam details.
- Enter eye exam details.
- Enter respiratory exam details.
- Set up drug testing information.
- Enter test results and referrals.

An organization can requires employee 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 are 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.

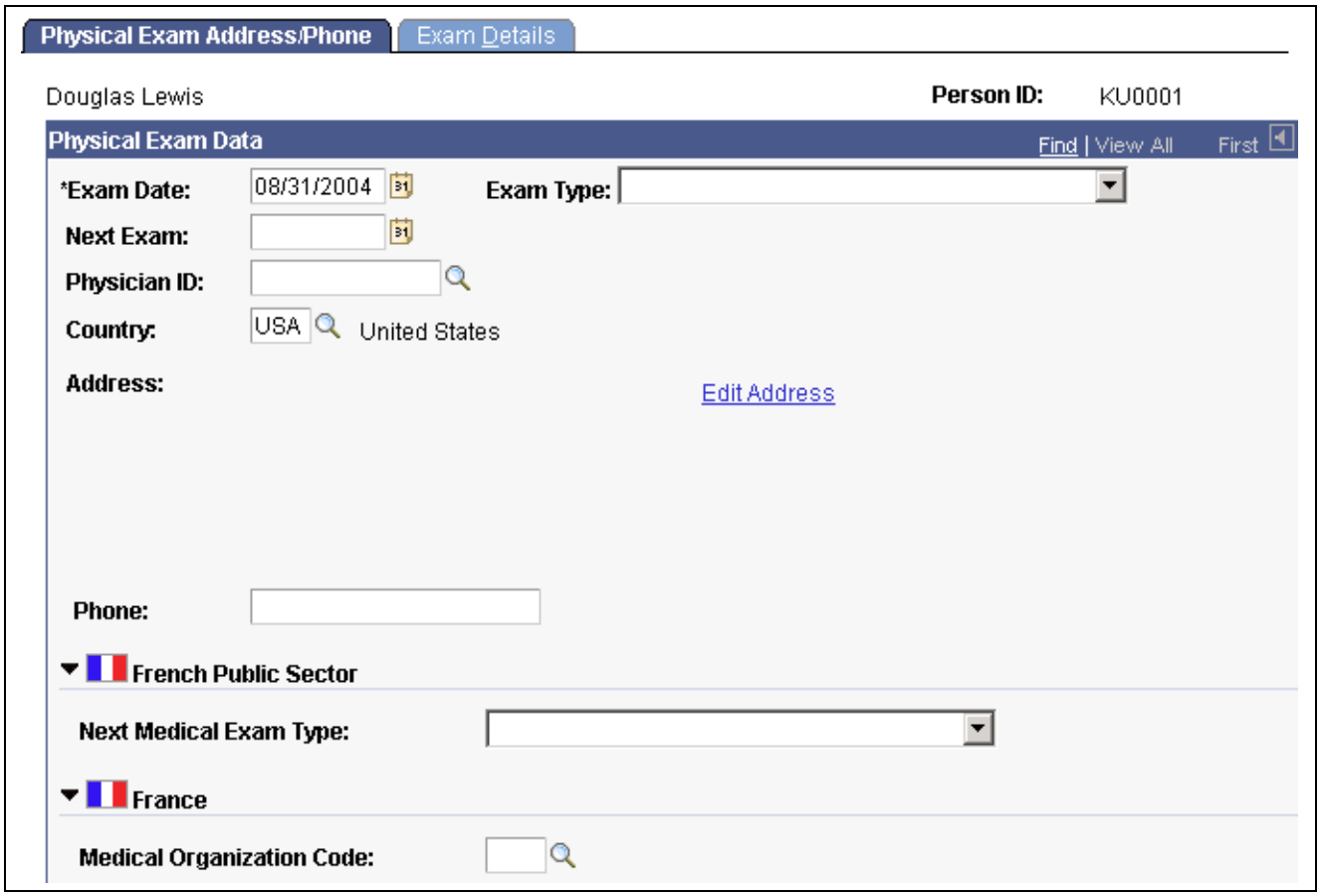
Pages Used to Track Medical Exam Results

Page Name	Object Name	Navigation	Usage
Physical Exam Address/Phone	HS_EXAM_PHYSICAL1	• Workforce Monitoring, Health and Safety, Record Medical Exam Results, Physical Exam, Physical Exam Address/Phone • 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, Exam Details • Workforce Monitoring, Health and Safety, Review Health Card Info, Hs Exam Physical2	Maintain physical exam results.
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, Record Medical Exam Results, Review Health Card Info, Hs Exam Audio1	Maintain audiometric exam results, referrals, and comments. Indicate the next audiometeric exam date, and enter physician information.
Audiometric Exam - Exam Details	HS_EXAM_AUDIO2	• Workforce Monitoring, Health and Safety, Record Medical Exam Results, Audiometric Exam, Exam Details • Workforce Monitoring, Health and Safety, Record Medical Exam Results, Review Health Card Info, Hs Exam Audio2	Maintain audiometric exam details.
Eye Exam - Exam Details	HS_EXAM_EYE2	• Workforce Monitoring, Health and Safety, Record Medical Exam Results, Eye Exam, Exam Details • Workforce Monitoring, Health and Safety, Record Medical Exam Results, Review Health Card Info, Hs Exam Eye2	Maintain exam results, referrals, and comments.

Page Name	Object Name	Navigation	Usage
Eye Exam - Eye Exam Address/Phone	HS_EXAM_EYE1	• Workforce Monitoring, Health and Safety, Record Medical Exam Results, Eye Exam, Eye Exam Address/Phone • Workforce Monitoring, Health and Safety, Record Medical Exam Results, Review Health Card Info, Hs Exam Eye1	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, Exam Details	Maintain exam results, referrals, restrictions, and comments.
Respiratory Exam - Respiratory Exam Addr/Phone	HS_EXAM_RESPIRE1	• Workforce Monitoring, Health and Safety, Record Medical Exam Results, Review Health Card Info, Hs Exam Respire1 • Workforce Monitoring, Health and Safety, Record Medical Exam Results, Respiratory Exam, Respiratory Exam Addr/Phone	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, Drug Test Data 1	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, Drug Test Data 2 • 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 page

Note. The only difference on the Address/Phone page of each exam group is the name: depending on the component that you open, the page name is Physical, Audiometric, Eye, Respiratory, or Drug Exam. The information below applies to all of the Address/Phone pages.

Exam Date Enter the date of the exam. The current date appears by default. You can override it, if necessary. 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 select a physician ID, the physician's address information from the Physician Table automatically fills in the address block. You can edit this address.

Edit Address Click this link to enter or modify an address. The appropriate address fields appear in the standardized address formats that you previously set up in the Country Table.

(FRA) France

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

(FPS) French Public Sector

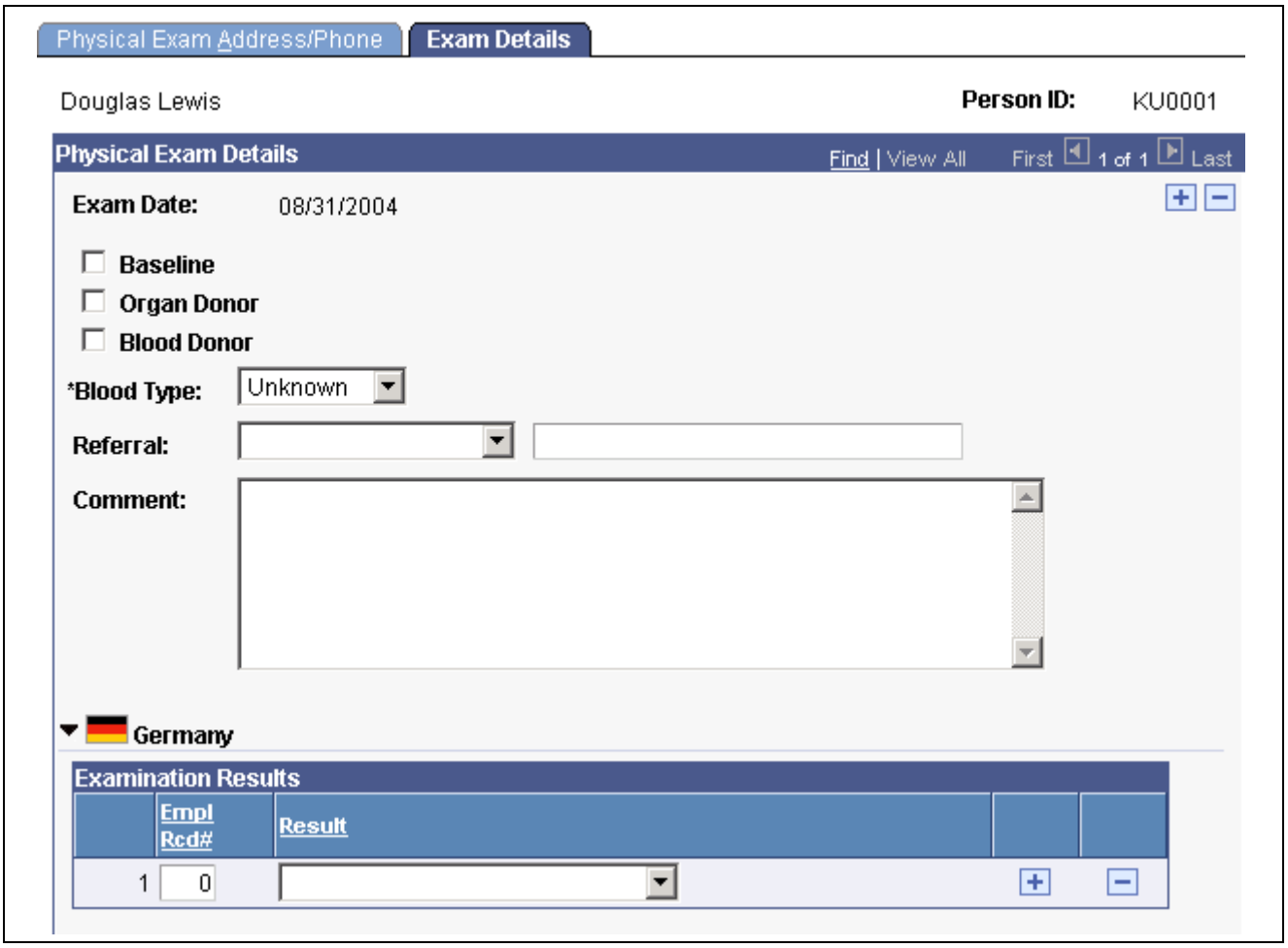
Next Medical Exam Type Select the next type of exam.

See Also

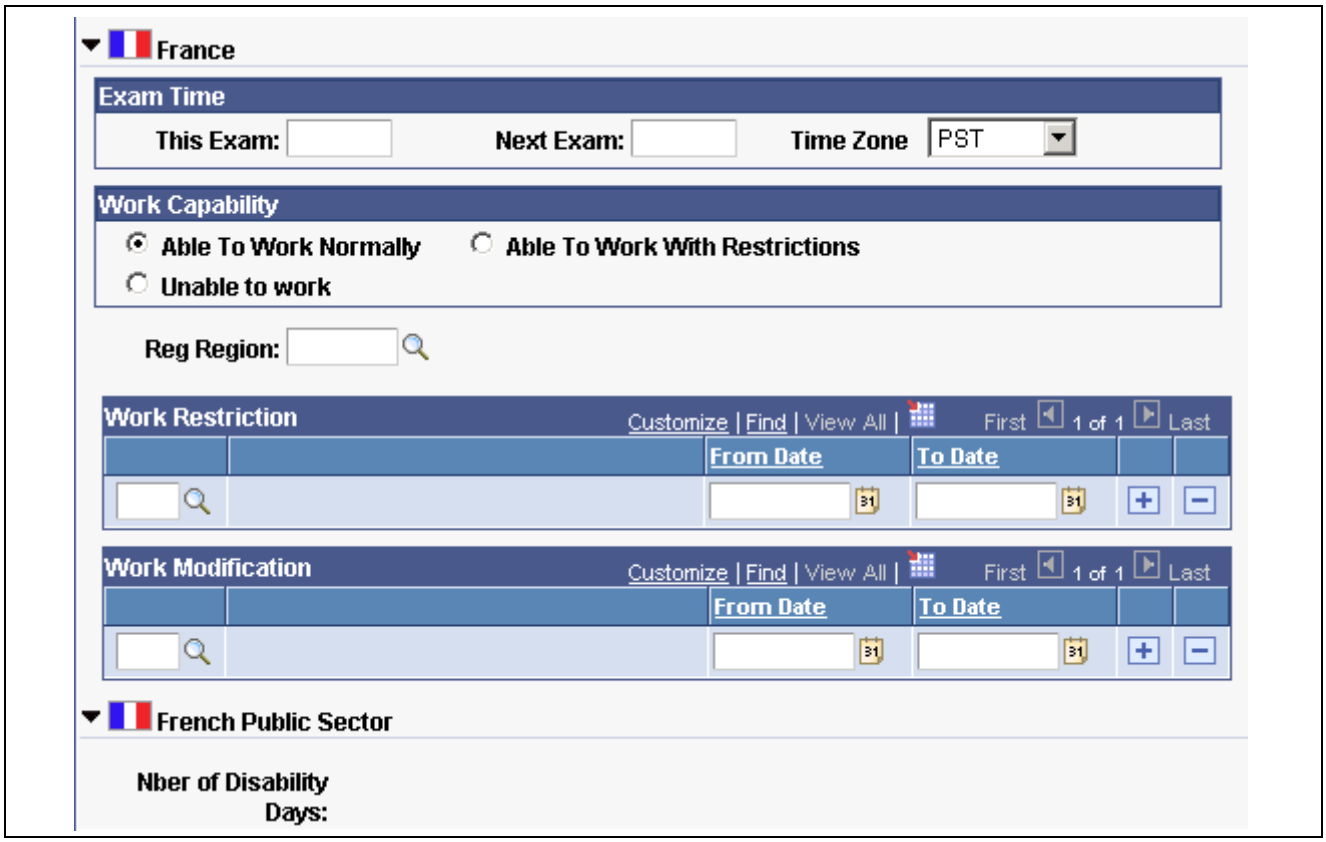
PeopleSoft Enterprise HRMS 8.9 Application Fundamentals PeopleBook, "Setting Up and Installing PeopleSoft HRMS," Administering Country Codes

Entering Physical Exam Results

Access the Physical Exam - Exam Details page.



Physical Exam - Exam Details page (1 of 2)



Physical Exam - Exam Details page (2 of 2)

The employee's name and employee ID appear 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.

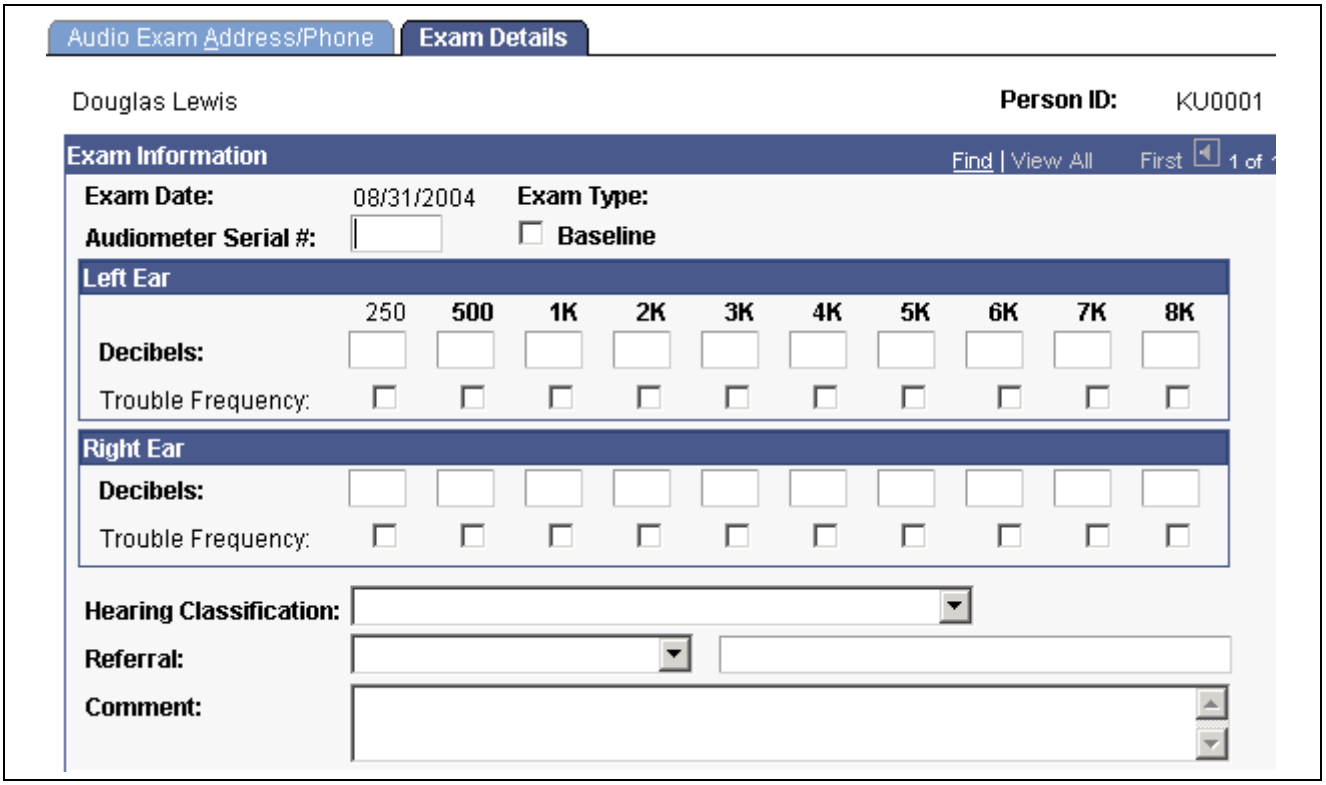
Work Restriction Enter this by selecting from the list of prompt values, which are from the Work Restrictions Table. Then enter the To and From Date for which the restriction applies.

(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.

Entering Hearing Exam Details

Access the Audiometric Exam - Exam Details page.



Audiometric Exam - Exam Details page

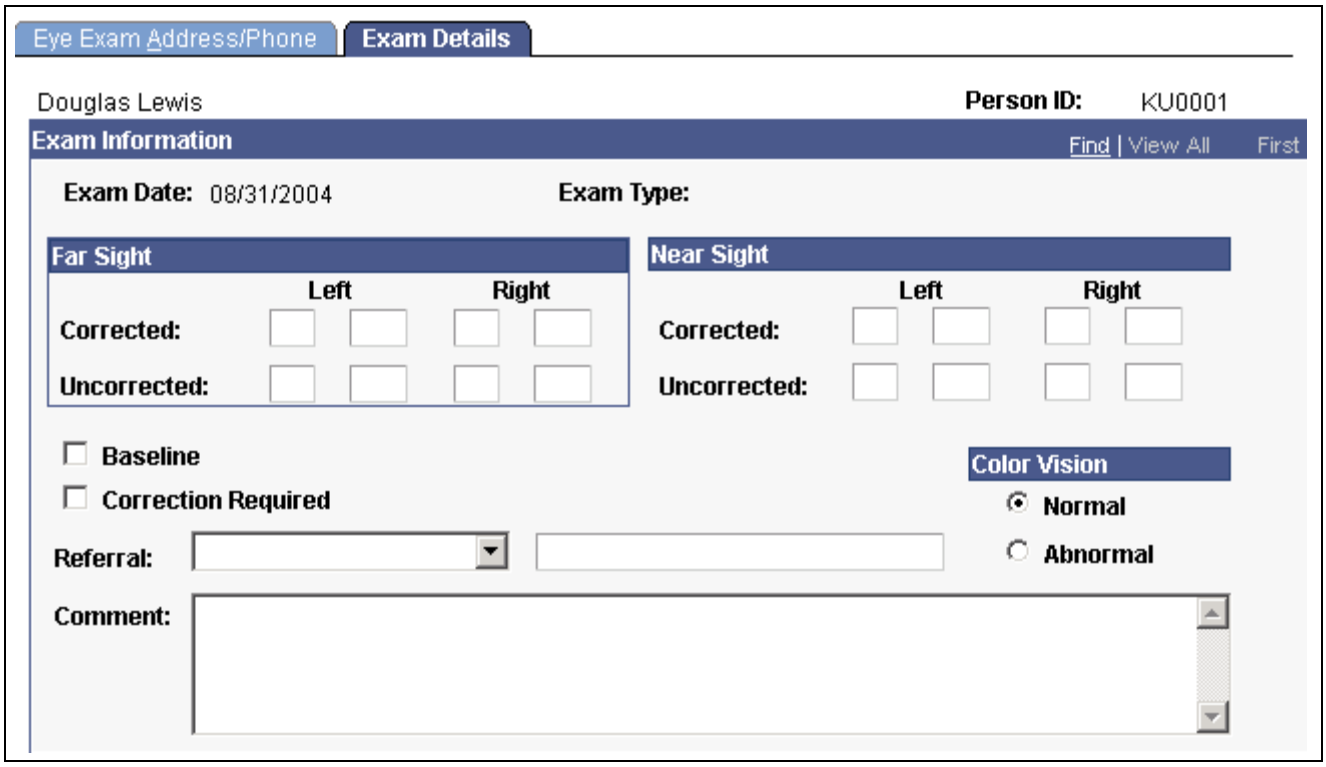
Decibels For each ear, enter the decibels the employee cannot hear.

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 - Exam Details page

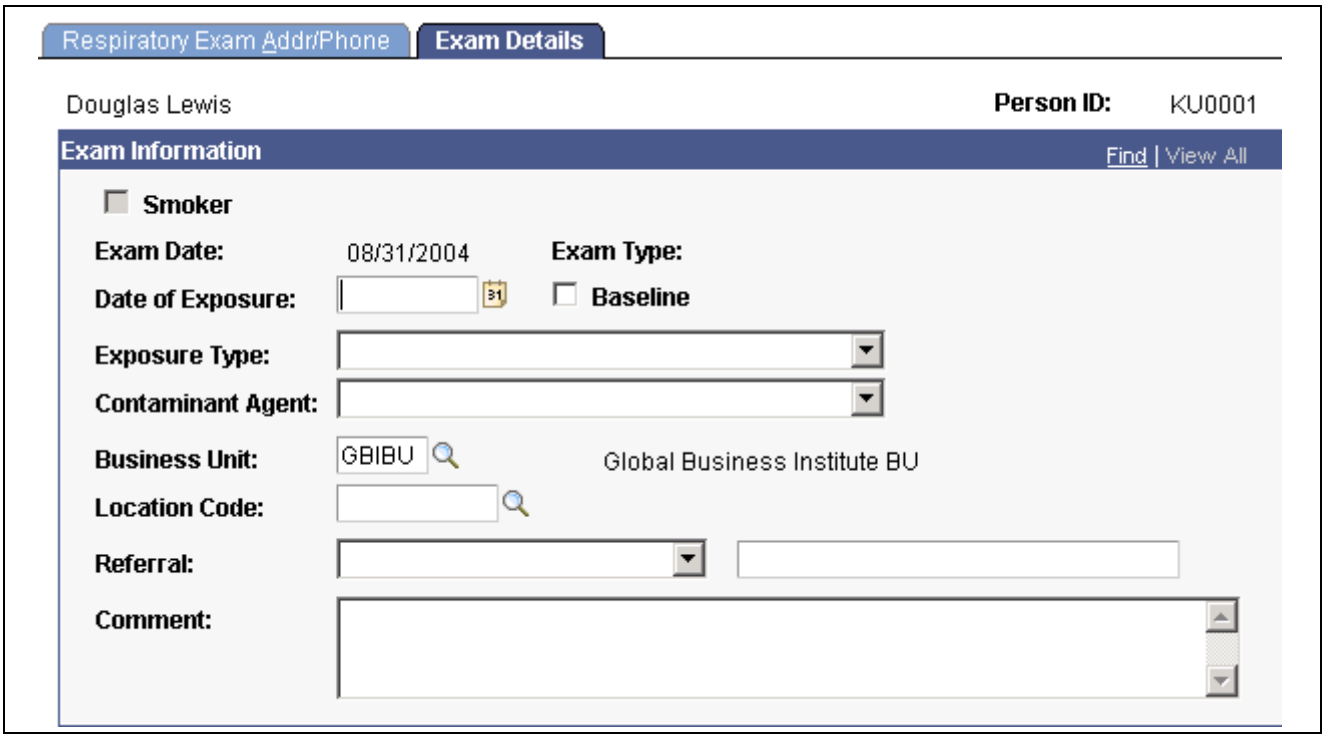
Color Vision Indicate if the patient's color vision is Normal or Abnormal.

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 - 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. Select an available Smoker check box to indicate 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.

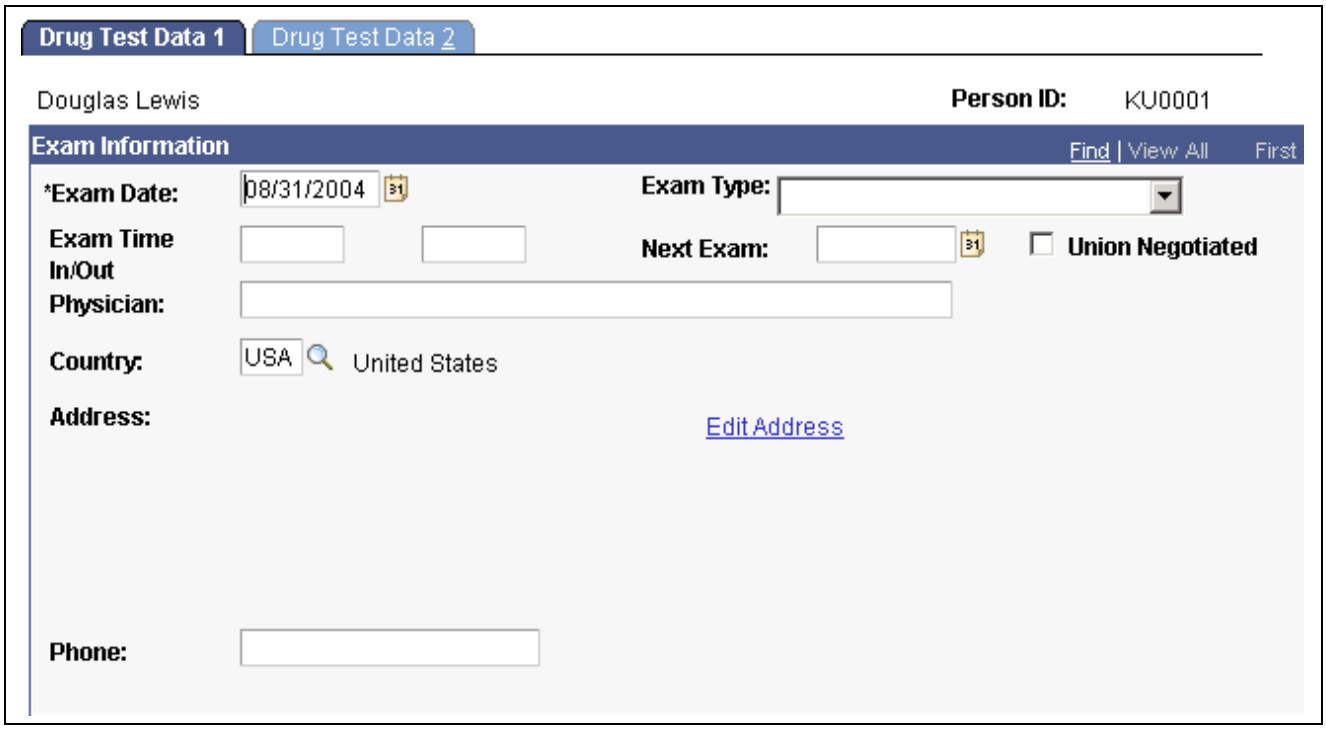
Contaminant Agent If it applies, select an option from the list of available options.

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 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.

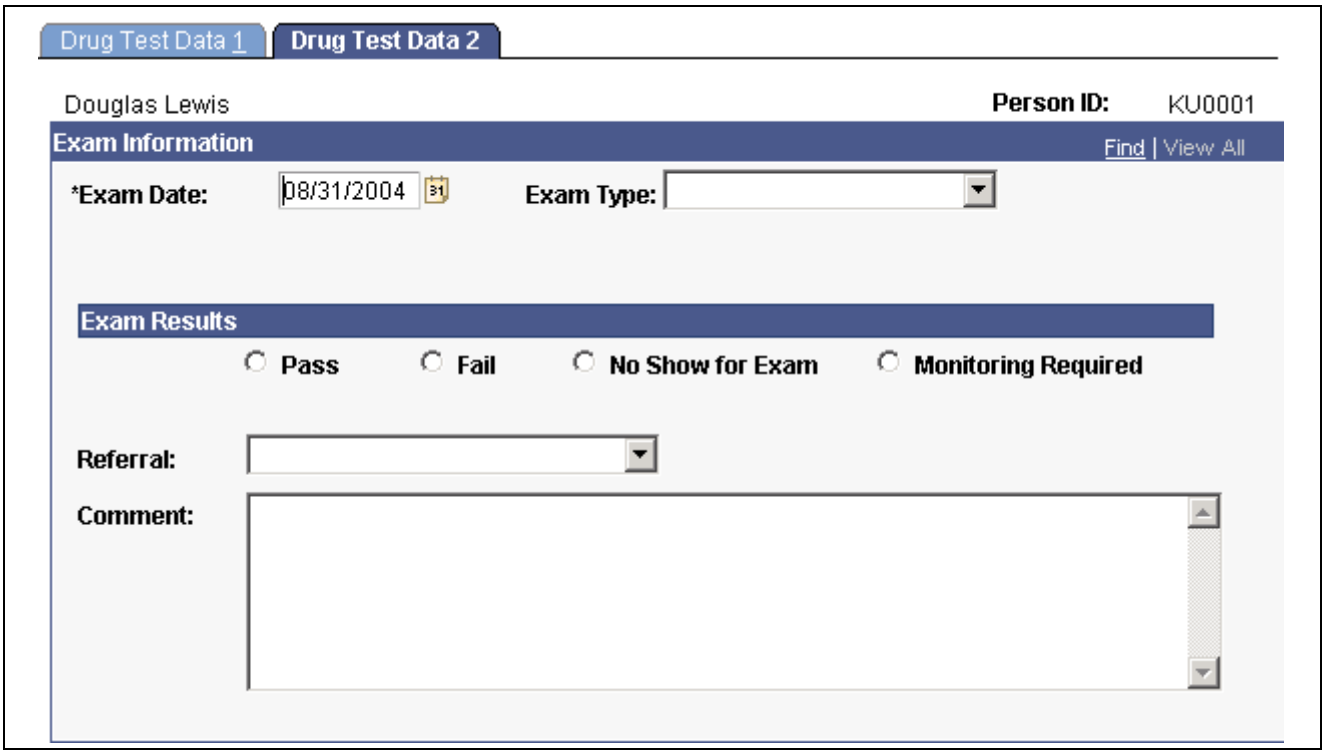
Testing Type Select one: *For Cause, Mandatory,* or *Random*.

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 2 page

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

CHAPTER 7

(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 Human Resources system to prepare these reports for British Columbia operations.

Getting Approval for Electronic Reporting

You need advance approval from the local WCB office:

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

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, Human Resources contains several edit checks and warnings. By following the warnings during data entry, you significantly increase the likelihood that the BC WCB accepts the report file the first time that you send it.

However, the BC WCB's mainframe computer checks for some things that 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 detects 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

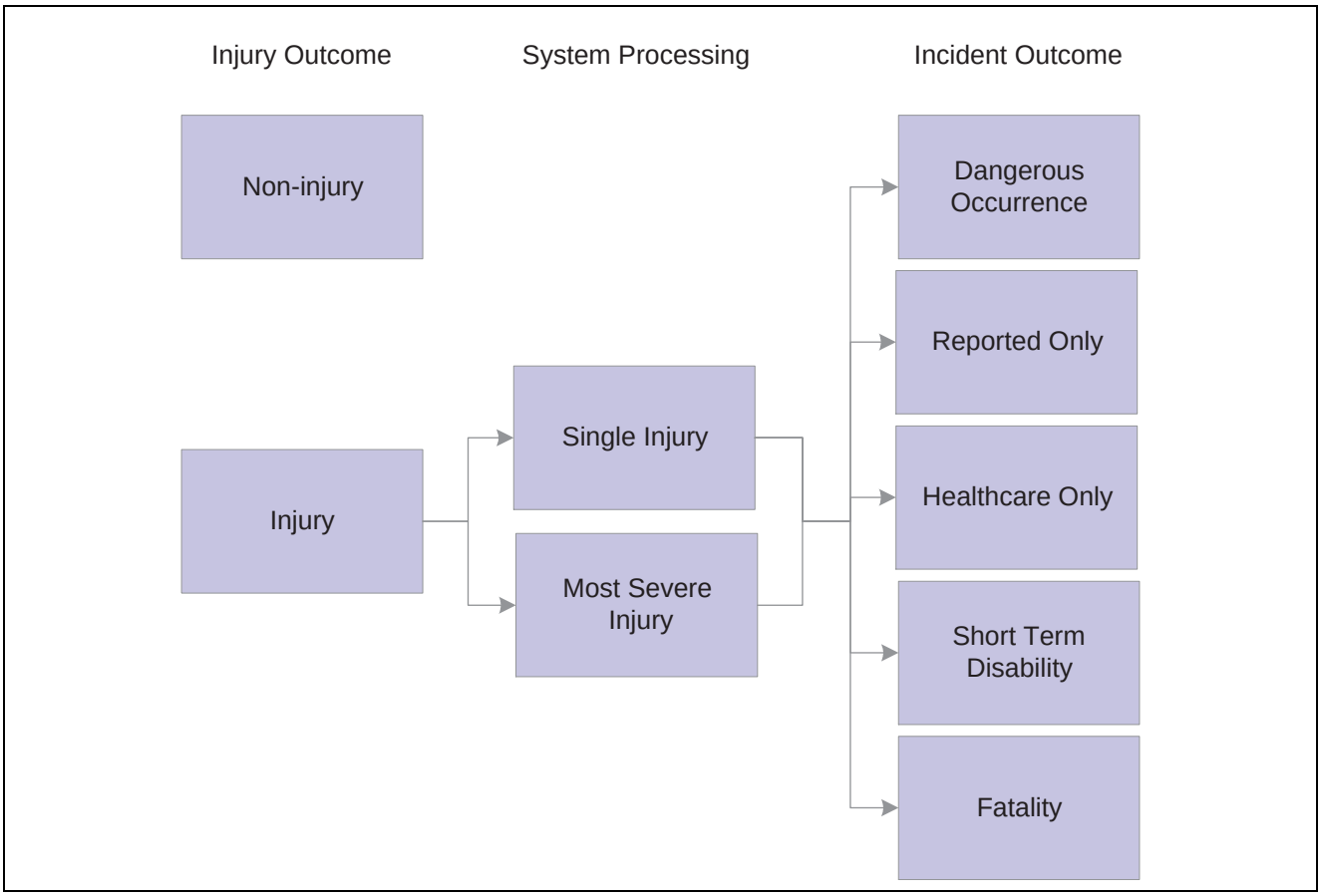
The BC WCB recognizes five types of incident outcomes for health and safety incidents. The following table lists these outcomes in increasing order of severity.

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 the Human Resources system. This means that entering a particular piece of information into the 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 as the most severe of the injury outcomes.

This diagram shows how incident outcome is derived from injury outcome.



Injury outcome and incident outcome

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

This section provides an overview of the steps for preparing reports for electronic transmission and discusses how to:

- Enter data for BC WCB reporting.
- Create an EDI file for BC WCB reporting.

Preparatory Steps for Report Transmission

The Electronic Data Interface (EDI) report that you prepare using 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. Run the CAN Collect BC WCB EDI Data process (OHS501BC).

3. Run 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	Enter the data required for British Columbia WCB electronic data reporting.
Create WCB EDI File	PRCSRUNCNTL	Workforce Monitoring, Health and Safety, Collect Health/Safety Data, Create WCB EDI File CAN	Create an EDI 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.

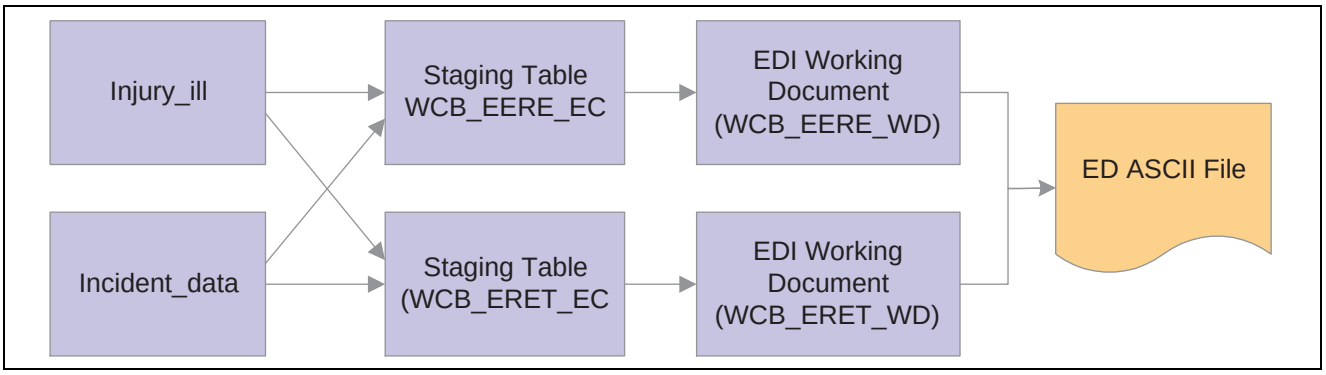
Much of the information captured in the EDI file concerns people associated with the incident. Identify them by employee or non-employee identification number(s). The WCB is concerned primarily about employees' injuries. Non-employees' injuries are reported in the case where they are witnesses or investigators.

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 this book. 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 SQRs and EDI Manager generates the ASCII file. This diagram shows how the process works:



EDI file creation process

You enter and change the data on the pages and the original tables. There is no means of editing the data in the intermediate, or 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 the ASCII file is defined by WCB in 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 that is used to show whether compression or encryption is used. The file is compressed in ZIP format before 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 the 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 8

(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.
- Enter case officer information.
- Collect data for German reports.

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. Human Resources enables you to track information specific to incidents that involve 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.

Reports for Germany

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

- Accident report (OHS001GR).
- Reportable Accident/Illness report (OHS002GR).
- Incident Location Summary report (OHS003GR).
- Illness report (OHS004GR).

Reviewing German Employee Checklist Data

This section describes prerequisites for reviewing checklist data and discusses how to use checklists to update medical exam information.

Prerequisites

An organization's physician can use the Employee Checklist page to view and enter the medical examination dates and exam status for employees in a *medical checklist.*

Before the organization's physician views and updates the status and date of medical examinations using the Employee Checklist page, create medical checklists for 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 are available so that you can configure checklists for employees.

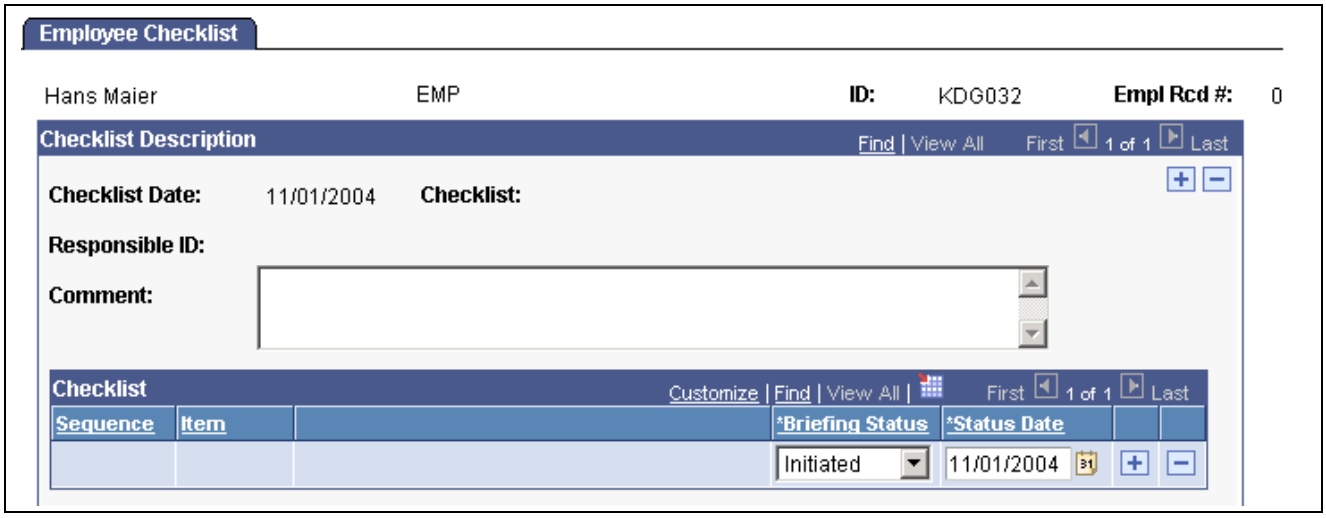
See *PeopleSoft Enterprise Human Resources 8.9 PeopleBook: Administer Workforce*, "Setting Up the Administer Workforce Business Process," Understanding Checklists.

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.



Employee Checklist page

You can add checklist items (exam types) by inserting additional rows.

Briefing Status Update the exam status by selecting from the list of available options: *Completed*, *Initiated*, *Notified*, or *Received*.

Tracking Illnesses for German Employees

This section discusses how to:

- Establish an illness profile.
- Describe employee circumstances.
- Enter information about job-related illnesses.
- Enter compensation and insurance information.
- Enter medical details.
- Enter corrective actions.
- Enter preventative actions.

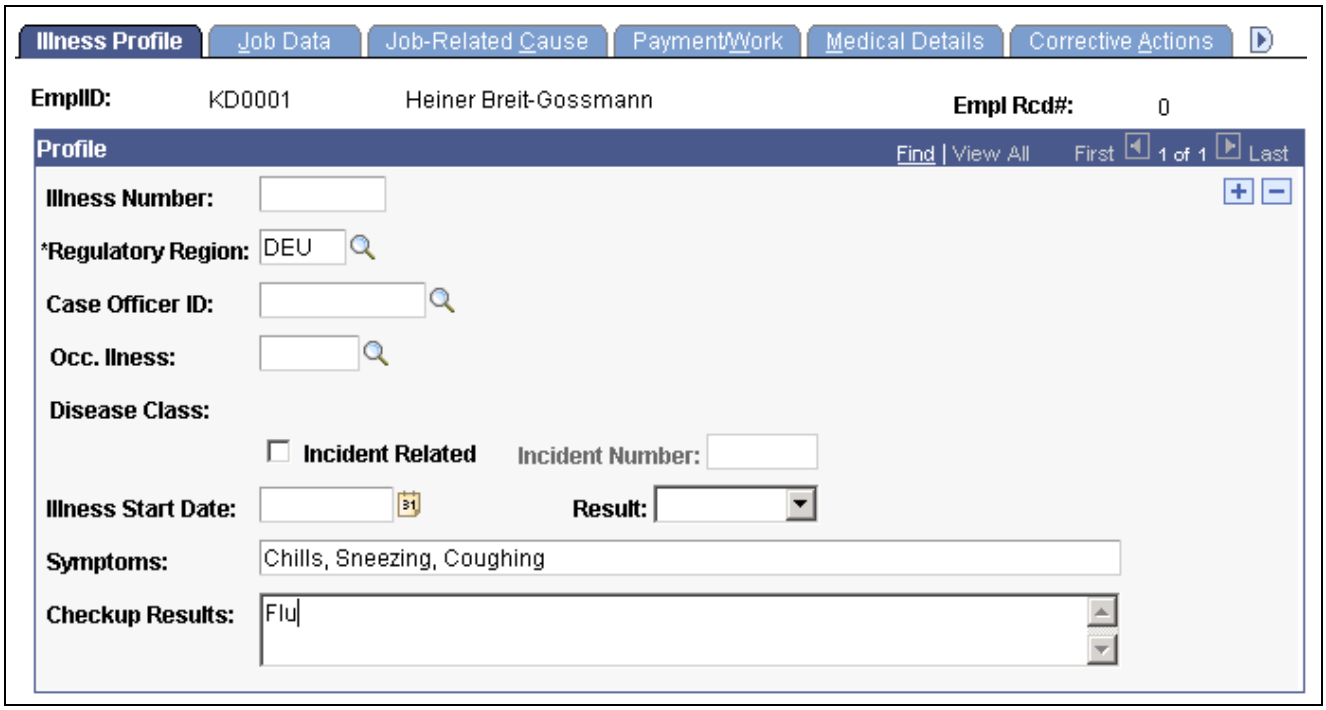
German laws and insurers require employers to track and report detailed occupational illness data. In Germany, all illnesses are tracked using the GER Illness Tracking component. The information that you enter on these pages is used in the GER Illness Report.

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 an employee's illnesses.
Job Details	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 Tracking - Illness Profile page.



Illness Tracking - Illness Profile page

Illness Number You may either enter an illness number or let the system assign one when you save.

Note. To prevent having two sets of numbers and to avoid confusion, PeopleSoft recommends that you either always enter the illness number 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 Select the regulatory region.

Case Officer ID Select a Case Officer ID, which is the employee identification number of a person assigned as 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 disease class that is associated with the occupational illness appears in this field. Disease class values come from the GER Disease Class Table. Use the values for occupational illnesses and disease classes that are defined by the 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, this field is available for data entry. Select a value from Incident Details.

Illness Start Date Enter the illness start date.

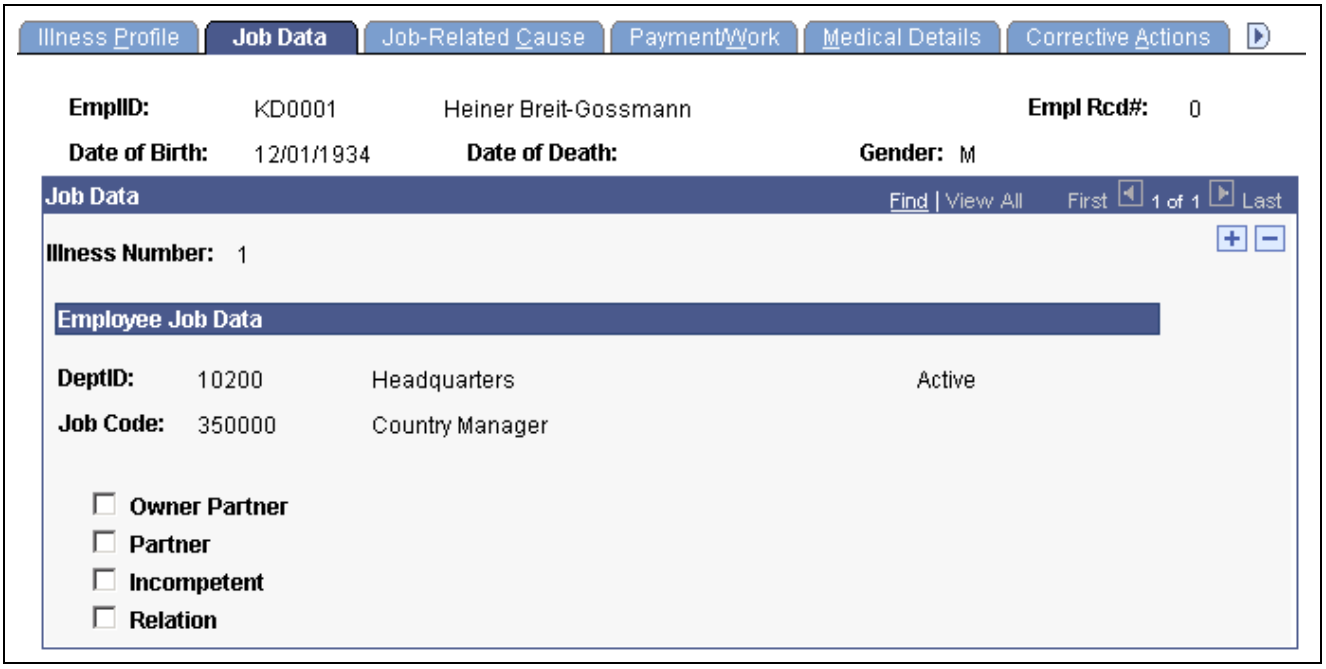
Result Select an option from the list of available options: *N/A* (not applicable), *Terminate*, *Transfer*.

Symptoms Enter a brief description.

Checkup Results Enter exam results.

Describing Employee Circumstances

Access the Illness Tracking - Job Data page.



Illness Tracking - Job Data page

The employee's data from Personal Data appears on this page if the individual is an employee, and from Non-Employee Details if not.

Illness Number You can insert a new row to add information for more another illness.

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.

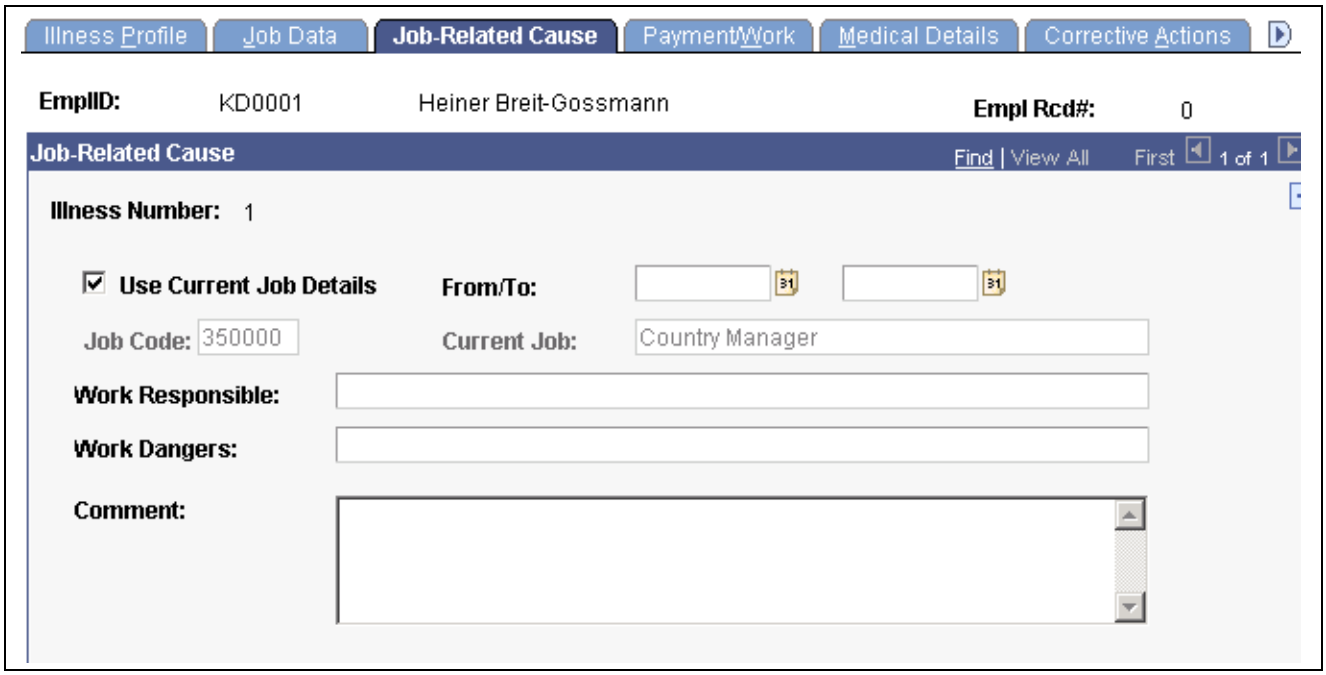
Partner Select this check box, if appropriate; Owner Partner and Relation check boxes are unavailable for data entry.

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 Illness Tracking - Job-Related Cause page.



Illness Tracking - 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 employee's most current job data appears in the Job Code and Current Job fields, 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

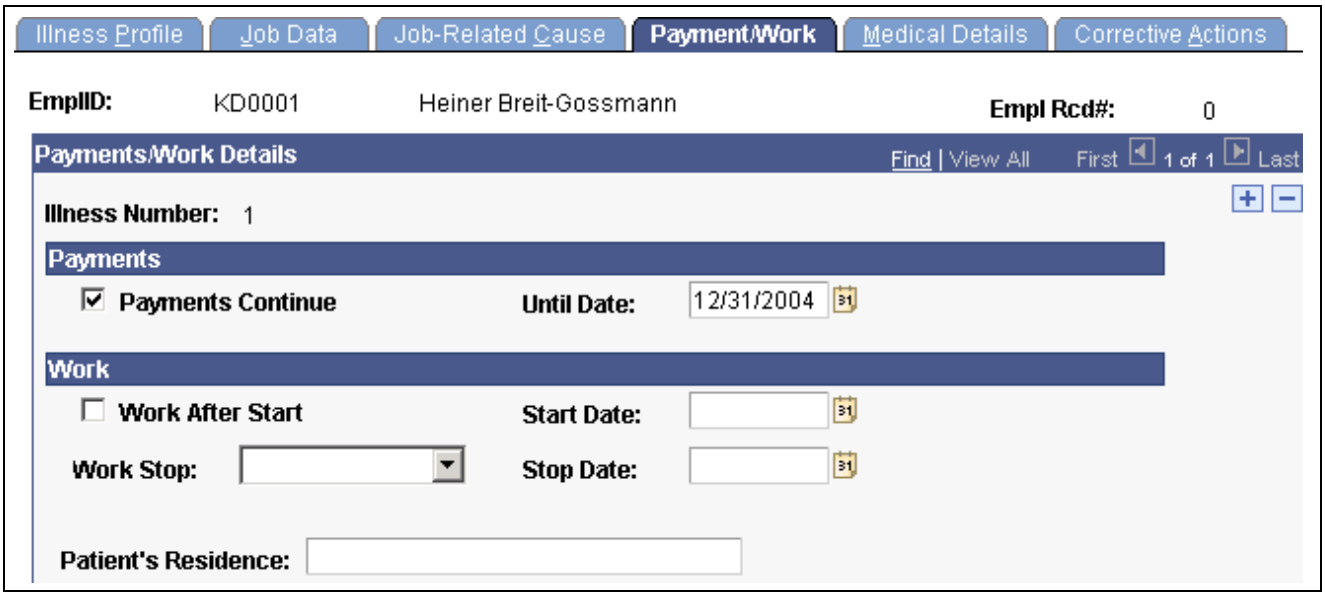
Enter the dates for the individual's job.

Work Responsible, Work Dangers

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

Entering Compensation and Insurance Information

Access the Illness Tracking - Payment/Work page.



Illness Tracking - 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

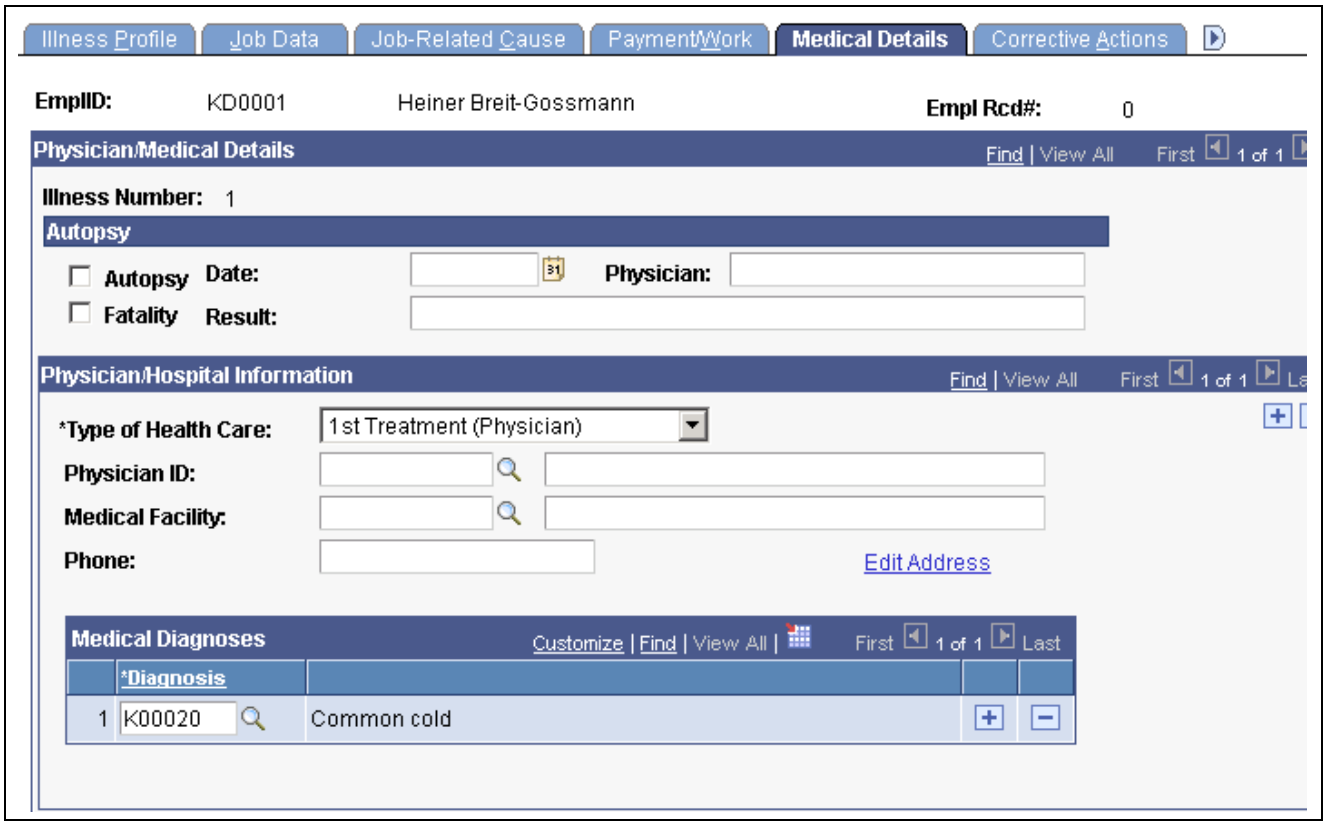
Work After Start Select if the employee has resumed working after an illness.

Start Date If you selected the Work After Start check box, enter the date that 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 Illness Tracking - Medical Details page.



Illness Tracking - Medical Details page

Autopsy

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

Autopsy Select this check box if an autopsy is performed.

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.

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.

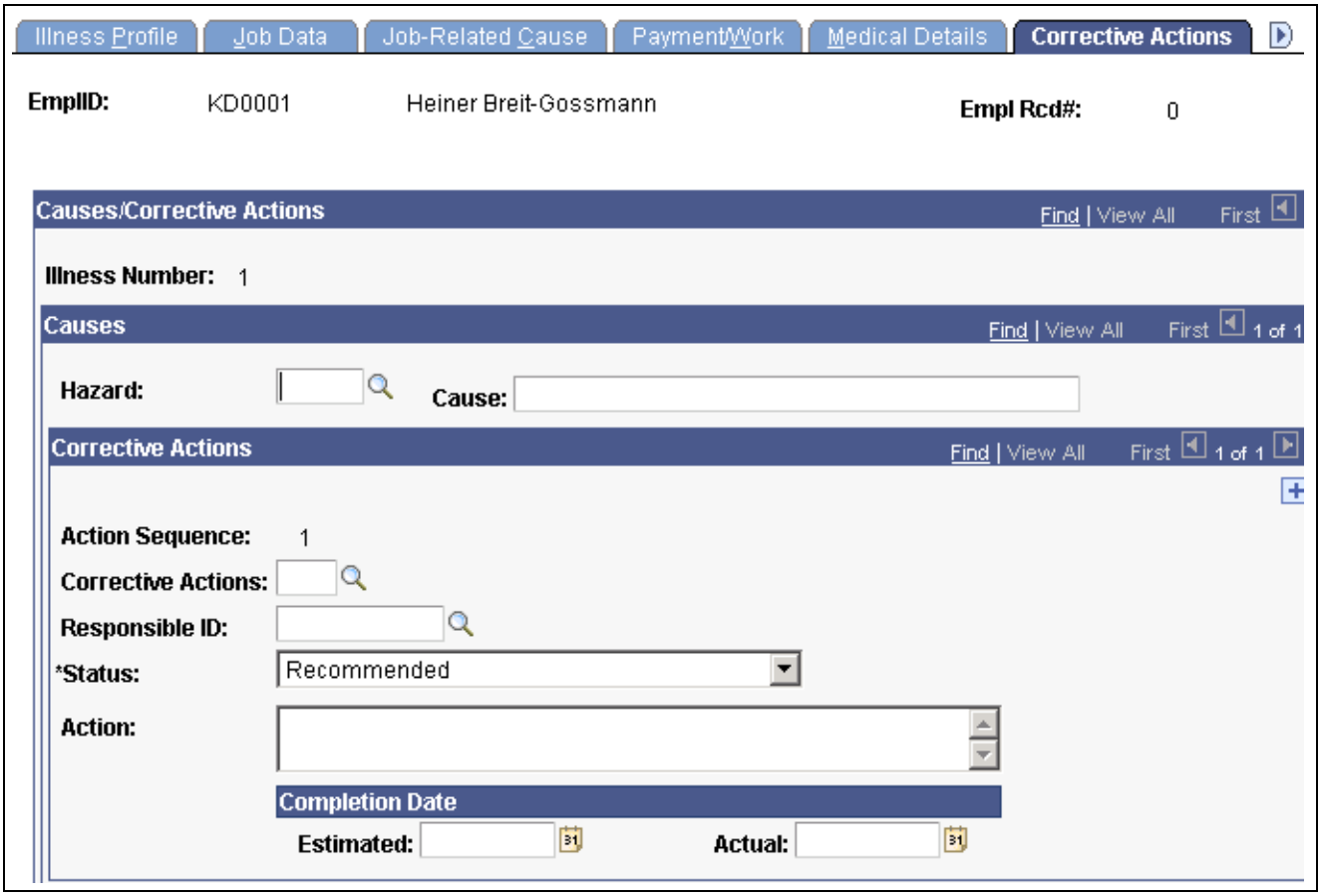
View Address Click this link to access the Injury Details - Diagnoses: Medical Facility Address page. This page is read-only. Use the Medical Facility page (HS_MEDICAL_FAC) to edit medical facility address information.

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 Illness Tracking - Corrective Actions page.



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 read 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.

Entering Preventative Actions

Access the Preventative Actions page.

This page is identical to the Corrective Actions page except that Corrective Actions field is Prevent Act.

Entering Case Officer Information for German Employees

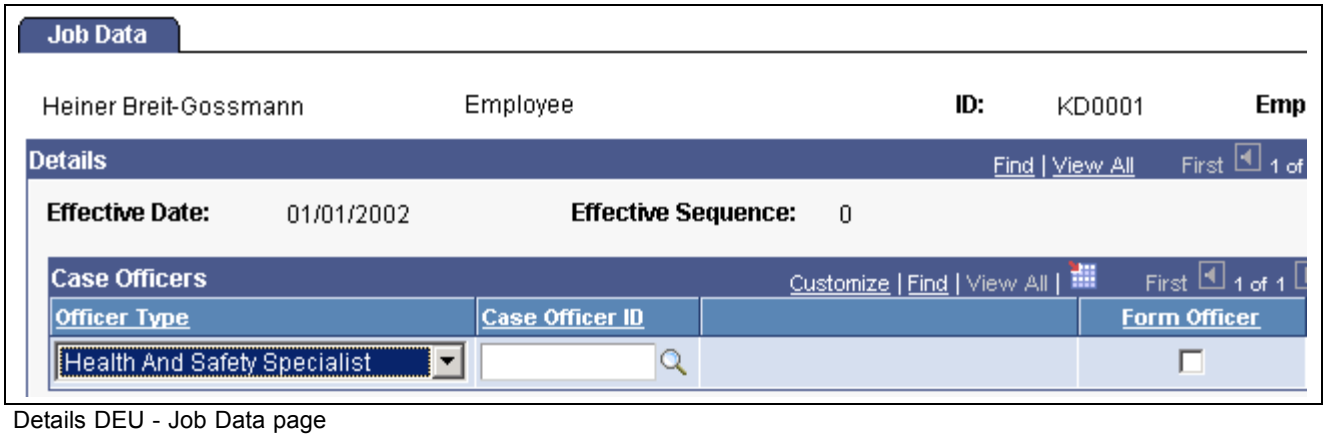
This section discusses how to enter information about the case officer assigned to an incident that involves a German employee.

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 that are 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 You can select from the list of case officers who are assigned to this employee's setID and location in the GER Case Officer Table.

Note. Employees in an organization are designated as case officers in Employee Details - GER. These case officers are classified by 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.

Collecting Data for German Reports

Before you can run the Illness report (OHS004GR), you must run the Collect Illness Report Data SQR process (OHS504GR).

Page Used to Collect Data for the Illness Report

Page Name	Object Name	Navigation	Usage
Illness Report	RUNCTL_OHS504GR	Workforce Monitoring, Health and Safety, Reports, Illness DEU	Collect illness data for generating the Illness report (OHS004GR).

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.

academic career In PeopleSoft Enterprise Campus Solutions, all course work that a student undertakes at an academic institution and that is grouped in a single student record. For example, a university that has an undergraduate school, a graduate school, and various professional schools might define several academic careers—an undergraduate career, a graduate career, and separate careers for each professional school (law school, medical school, dental school, and so on).

academic institution In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.

academic organization In PeopleSoft Enterprise Campus Solutions, an entity that is part of the administrative structure within an academic institution. At the lowest level, an academic organization might be an academic department. At the highest level, an academic organization can represent a division.

academic plan In PeopleSoft Enterprise Campus Solutions, an area of study—such as a major, minor, or specialization—that exists within an academic program or academic career.

academic program In PeopleSoft Enterprise Campus Solutions, the entity to which a student applies and is admitted and from which the student graduates.

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 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.

action template In PeopleSoft Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition.

activity In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.

In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.

In PeopleSoft Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks.

In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.

address usage In PeopleSoft Enterprise Campus Solutions, a grouping of address types defining the order in which the address types are used. For example, you might define an address usage code to process addresses in the following order: billing address, dormitory address, home address, and then work address.

adjustment calendar In PeopleSoft Enterprise Campus Solutions, the adjustment calendar controls how a particular charge is adjusted on a student's account when the student drops classes or withdraws from a term. The charge adjustment is based on how much time has elapsed from a predetermined date, and it is determined as a percentage of the original charge amount.

administrative function In PeopleSoft Enterprise Campus Solutions, a particular functional area that processes checklists, communication, and comments. The administrative function identifies which variable data is added to a person's checklist or communication record when a specific checklist code, communication category, or comment is assigned to the student. This key data enables you to trace that checklist, communication, or comment back to a specific processing event in a functional area.

admit type In PeopleSoft Enterprise Campus Solutions, a designation used to distinguish first-year applications from transfer applications.

agreement In PeopleSoft eSettlements, provides a way to group and specify processing options, such as payment terms, pay from a bank, and notifications by a buyer and supplier location combination.

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.

analysis database In PeopleSoft Enterprise Campus Solutions, database tables that store large amounts of student information that may not appear in standard report formats. The analysis database tables contain keys for all objects in a report that an application program can use to reference other student-record objects that are not contained in the printed report. For instance, the analysis database contains data on courses that are considered for satisfying a requirement but that are rejected. It also contains information on

	courses captured by global limits. An analysis database is used in PeopleSoft Enterprise Academic Advisement.
Application Messaging	PeopleSoft Application Messaging enables applications within the PeopleSoft Enterprise product family to communicate synchronously or asynchronously with other PeopleSoft and third-party applications. An application message defines the records and fields to be published or subscribed to.
AR specialist	Abbreviation for *receivables specialist.* In PeopleSoft Receivables, an individual in who tracks and resolves deductions and disputed items.
arbitration plan	In PeopleSoft Enterprise Pricer, defines how price rules are to be applied to the base price when the transaction is priced.
assessment rule	In PeopleSoft Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action.
asset class	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
attribute/value pair	In PeopleSoft Directory Interface, relates the data that makes up an entry in the directory information tree.
audience	In PeopleSoft Enterprise Campus Solutions, a segment of the database that relates to an initiative, or a membership organization that is based on constituent attributes rather than a dues-paying structure. Examples of audiences include the Class of '65 and Undergraduate Arts & Sciences.
authentication server	A server that is set up to verify users of the system.
base time period	In PeopleSoft Business Planning, the lowest level time period in a calendar.
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.
billing career	In PeopleSoft Enterprise Campus Solutions, the one career under which other careers are grouped for billing purposes if a student is active simultaneously in multiple careers.
bio bit or bio brief	In PeopleSoft Enterprise Campus Solutions, a report that summarizes information stored in the system about a particular constituent. You can generate standard or specialized reports.
book	In PeopleSoft Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.
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 activity The name of a subset of a detailed business process. This might be a specific transaction, task, or action that you perform in a business process.

business event In PeopleSoft Receivables, defines the processing characteristics for the Receivable Update process for a draft activity.

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).

business process A standard set of 17 business processes are defined and maintained by the PeopleSoft product families and are supported by Business Process Engineering group at PeopleSoft. An example of a business process is Order Fulfillment, which is a business process that manages sales orders and contracts, inventory, billing, and so forth.

See also *detailed business process.*

business task The name of the specific function depicted in one of the business processes.

business unit A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.

buyer In PeopleSoft eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system.

campus In PeopleSoft Enterprise Campus Solutions, an entity that is usually associated with a distinct physical administrative unit, that belongs to a single academic institution, that uses a unique course catalog, and that produces a common transcript for students within the same academic career.

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. A catalog item can have one or more learning activities.

catalog map In PeopleSoft Catalog Management, translates values from the catalog source data to the format of the company’s catalog.

catalog partner In PeopleSoft Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.

categorization Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.

category In PeopleSoft Enterprise Campus Solutions, a broad grouping to which specific comments or communications (contexts) are assigned. Category codes are also linked to 3C access groups so that you can assign data-entry or view-only privileges across functions.

channel In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.

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.

checkbook In PeopleSoft Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.

checklist code In PeopleSoft Enterprise Campus Solutions, a code that represents a list of planned or completed action items that can be assigned to a staff member, volunteer, or unit. Checklists enable you to view all action assignments on one page.

class In PeopleSoft Enterprise Campus Solutions, a specific offering of a course component within an academic term.

See also *course.*

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 *sub-classification.*

clearance In PeopleSoft Enterprise Campus Solutions, the period of time during which a constituent in PeopleSoft Contributor Relations is approved for involvement in an initiative or an action. Clearances are used to prevent development officers from making multiple requests to a constituent during the same time period.

clone In PeopleCode, to make a unique copy. In contrast, to *copy* may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.

cohort In PeopleSoft Enterprise Campus Solutions, the highest level of the three-level classification structure that you define for enrollment management. You can define a cohort level, link it to other levels, and set enrollment target numbers for it.

See also *population* and *division*.

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.

collection rule In PeopleSoft Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.

comm key See *communication key.*

communication key In PeopleSoft Enterprise Campus Solutions, a single code for entering a combination of communication category, communication context, communication method, communication direction, and standard letter code. Communication keys (also called *comm keys* or *speed keys*) can be created for background processes as well as for specific users.

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.

component interface A component interface is a set of application programming interfaces (APIs) that you can use to access and modify PeopleSoft database information using a program instead of the PeopleSoft client.

condition In PeopleSoft Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.

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.

constituents In PeopleSoft Enterprise Campus Solutions, friends, alumni, organizations, foundations, or other entities affiliated with the institution, and about which the institution maintains information. The constituent types delivered with PeopleSoft Enterprise Contributor Relations Solutions are based on those defined by the Council for the Advancement and Support of Education (CASE).

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 PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running.

In PeopleSoft Enterprise Campus Solutions, a specific instance of a comment or communication. One or more contexts are assigned to a category, which you link to 3C access groups so that you can assign data-entry or view-only privileges across functions.

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.

control table Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.

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.

course In PeopleSoft Enterprise Campus Solutions, a course that is offered by a school and that is typically described in a course catalog. A course has a standard syllabus and credit level; however, these may be modified at the class level. Courses can contain multiple components such as lecture, discussion, and lab.

See also *class*.

course share set In PeopleSoft Enterprise Campus Solutions, a tag that defines a set of requirement groups that can share courses. Course share sets are used in PeopleSoft Enterprise Academic Advisement.

current learning In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.

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 cube In PeopleSoft Analytic Calculation Engine, a data cube is a container for one kind of data (such as Sales data) and works with in tandem with one or more dimensions. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and online analytical processing (OLAP) cubes in PeopleSoft Cube Manager.

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.

dataset A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.

delivery method In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method.

In PeopleSoft Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, rail, and so on). The delivery method is specified when creating shipment schedules.

delivery method type In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.

detailed business process A subset of the business process. For example, the detailed business process named Determine Cash Position is a subset of the business process called Cash Management.

dimension In PeopleSoft Analytic Calculation Engine, a dimension contains a list of one kind of data that can span various contexts, and it is a basic component of an analytic model. Within the analytic model, a dimension is attached to one or more data cubes. In PeopleSoft Cube Manager, a dimension is the most basic component of an OLAP cube and specifies the PeopleSoft metadata to be used to create the dimension's rollup structure. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and OLAP cubes in PeopleSoft Cube Manager.

directory information tree In PeopleSoft Directory Interface, the representation of a directory's hierarchical structure.

division In PeopleSoft Enterprise Campus Solutions, the lowest level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a division level, link it to other levels, and set enrollment target numbers for it.

See also *population* and *cohort*.

document sequencing A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.

dynamic detail tree A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are 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 ledger Abbreviation for *Enterprise Incentive Management ledger.* 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.

elimination set In PeopleSoft General Ledger, a related group of intercompany accounts that is processed during consolidations.

entry event In PeopleSoft General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.

equitization In PeopleSoft General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.

equity item limit In PeopleSoft Enterprise Campus Solutions, the amounts of funds set by the institution to be awarded with discretionary or gift funds. The limit could be reduced by amounts equal to such things as expected family contribution (EFC) or parent contribution. Students are packaged by Equity Item Type Groups and Related Equity Item Types. This limit can be used to assure that similar student populations are packaged equally.

event A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete.

In PeopleSoft Human Resources, also refers to an incident that affects 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.

exception In PeopleSoft Receivables, an item that either is a deduction or is in dispute.

exclusive pricing In PeopleSoft Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions.

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.

financial aid term In PeopleSoft Enterprise Campus Solutions, a combination of a period of time that the school determines as an instructional accounting period and an academic career. It is created and defined during the setup process. Only terms eligible for financial aid are set up for each financial aid career.

forecast item A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage.

fund In PeopleSoft Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual.

gap In PeopleSoft Enterprise Campus Solutions, an artificial figure that sets aside an amount of unmet financial aid need that is not funded with Title IV funds. A gap can be used to prevent fully funding any student to conserve funds, or it can be used to preserve unmet financial aid need so that institutional funds can be awarded.

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.

gift table In PeopleSoft Enterprise Campus Solutions, a table or so-called *donor pyramid* describing the number and size of gifts that you expect will be needed to successfully complete the campaign in PeopleSoft Contributor Relations. The gift table enables you to estimate the number of donors and prospects that you need at each gift level to reach the campaign goal.

GL business unit Abbreviation for *general ledger business unit.* A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books.

See also *business unit*.

GL entry template Abbreviation for *general ledger entry template.* In PeopleSoft Enterprise Campus Solutions, a template that defines how a particular item is sent to the general ledger. An item-type maps to the general ledger, and the GL entry template can involve multiple general ledger accounts. The entry to the general ledger is further controlled by high-level flags that control the summarization and the type of accounting—that is, accrual or cash.

GL Interface process Abbreviation for *General Ledger Interface process.* In PeopleSoft Enterprise Campus Solutions, a process that is used to send transactions from PeopleSoft Enterprise Student Financials to the general ledger. Item types are mapped to specific general ledger accounts, enabling transactions to move to the general ledger when the GL Interface process is run.

group In PeopleSoft Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs).

In PeopleSoft Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.

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.

incur In PeopleSoft Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.

initiative In PeopleSoft Enterprise Campus Solutions, the basis from which all advancement plans are executed. It is an organized effort targeting a specific constituency, and it can occur over a specified period of time with specific purposes and goals. An initiative can be a campaign, an event, an organized volunteer effort, a membership drive, or any other type of effort defined by the institution. Initiatives can be multipart, and they can be related to other initiatives. This enables you to track individual parts of an initiative, as well as entire initiatives.

inquiry access In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user only to view data.

See also *update access.*

institution In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.

integration A relationship between two compatible integration points that enables communication to take place between systems. Integrations enable PeopleSoft applications to work seamlessly with other PeopleSoft applications or with third-party systems or software.

integration point An interface that a system uses to communicate with another PeopleSoft application or an external application.

integration set A logical grouping of integrations that applications use for the same business purpose. For example, the integration set ADVANCED_SHIPPING_ORDER contains all of the integrations that notify a customer that an order has shipped.

item In PeopleSoft Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse).

In PeopleSoft Demand Planning, Inventory Policy Planning, and Supply Planning, a noninventory item that is designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material (BOM) or planning routing, and it can exist as a component on a planning BOM. A planning item cannot be specified on a production or engineering BOM or routing, and it cannot be used as a component in a production. The quantity on hand will never be maintained.

In PeopleSoft Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.

item shuffle In PeopleSoft Enterprise Campus Solutions, a process that enables you to change a payment allocation without having to reverse the payment.

joint communication In PeopleSoft Enterprise Campus Solutions, one letter that is addressed jointly to two people. For example, a letter might be addressed to both Mr. Sudhir Awat and Ms. Samantha Mortelli. A relationship must be established between the two individuals in the database, and at least one of the individuals must have an ID in the database.

keyword In PeopleSoft Enterprise Campus Solutions, a term that you link to particular elements within PeopleSoft Student Financials, Financial Aid, and Contributor Relations. You can use keywords as search criteria that enable you to locate specific records in a search dialog box.

KPI An abbreviation for *key performance indicator.* A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.

LDIF file Abbreviation for *Lightweight Directory Access Protocol (LDAP) Data Interchange Format file.* Contains discrepancies between PeopleSoft data and directory data.

learner group In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office.

learning components In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity.

learning environment In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them.

learning history In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.

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 *rates*) 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.

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.

LMS Abbreviation for *learning management system.* In PeopleSoft Enterprise Campus Solutions, LMS is a PeopleSoft Student Records feature that provides a common set of interoperability standards that enable the sharing of instructional content and data between learning and administrative environments.

load In PeopleSoft Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Inventory that is used to track the weight, the volume, and the destination of a shipment.

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 *1*—is the address you use most often and may be different from the main address.

logistical task In PeopleSoft Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.

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.

mass change In PeopleSoft Enterprise Campus Solutions, mass change is a SQL generator that can be used to create specialized functionality. Using mass change, you can set up a series of Insert, Update, or Delete SQL statements to perform business functions that are specific to the institution.

See also *3C engine*.

match group In PeopleSoft Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.

MCF server Abbreviation for *PeopleSoft MultiChannel Framework server.* Comprises the universal queue server and the MCF log server. Both processes are started when *MCF Servers* is selected in an application server domain configuration.

merchandising activity In PeopleSoft Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.

meta-SQL Meta-SQL constructs expand into platform-specific Structured Query Language (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 In PeopleSoft General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers).

multicurrency The ability to process transactions in a currency other than the business unit's base currency.

national allowance In PeopleSoft Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.

need In PeopleSoft Enterprise Campus Solutions, the difference between the cost of attendance (COA) and the expected family contribution (EFC). It is the gap between the cost of attending the school and the student's resources. The financial aid package

	is based on the amount of financial need. The process of determining a student's need is called *need analysis.*
node-oriented tree	A tree that is based on a detail structure, but the detail values are not used.
pagelet	Each block of content on the home page 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.
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 *compensation object.*
partner	A company that supplies products or services that are resold or purchased by the enterprise.
pay cycle	In PeopleSoft Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.
payment shuffle	In PeopleSoft Enterprise Campus Solutions, a process allowing payments that have been previously posted to a student's account to be automatically reapplied when a higher priority payment is posted or the payment allocation definition is changed.
pending item	In PeopleSoft Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.
PeopleCode	PeopleCode is a proprietary language, executed by the PeopleSoft component processor. PeopleCode generates results based on existing data or user actions. By using various tools provided with PeopleTools, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.
PeopleCode event	See *event.*
PeopleSoft Pure Internet Architecture	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (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.
person of interest	A person about whom the organization maintains information but who is not part of the workforce.
personal portfolio	In PeopleSoft Enterprise Campus Solutions, the user-accessible menu item that contains an individual's name, address, telephone number, and other personal information.
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 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.

planned learning In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.

planning instance In PeopleSoft Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.

population In PeopleSoft Enterprise Campus Solutions, the middle level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a population level, link it to other levels, and set enrollment target numbers for it.

See also *division* and *cohort*.

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.

price list In PeopleSoft Enterprise Pricer, enables you to select products and conditions for which the price list applies to a transaction. During a transaction, the system either determines the product price based on the predefined search hierarchy for the transaction or uses the product's lowest price on any associated, active price lists. This price is used as the basis for any further discounts and surcharges.

price rule In PeopleSoft Enterprise Pricer, defines the conditions that must be met for adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met.

price rule condition In PeopleSoft Enterprise Pricer, selects the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields are related to the transaction.

price rule key In PeopleSoft Enterprise Pricer, defines the fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.

primacy number In PeopleSoft Enterprise Campus Solutions, a number that the system uses to prioritize financial aid applications when students are enrolled in multiple academic careers and academic programs at the same time. The Consolidate Academic Statistics process uses the primacy number indicated for both the career and program at the institutional level to determine a student's primary career and program. The system also uses the number to determine the primary student attribute value that is used when you extract data to report on cohorts. The lowest number takes precedence.

primary name type In PeopleSoft Enterprise Campus Solutions, the name type that is used to link the name stored at the highest level within the system to the lower-level set of names that an individual provides.

process category In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.

process group In PeopleSoft Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.

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 a Structured Query Report (SQR), a COBOL or Application Engine 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 A PeopleSoft or third-party product. PeopleSoft organizes its software products into product families and product lines. Interactive Services Repository contains information about every release of every product that PeopleSoft sells, as well as products from certified third-party companies. These products are displayed with the product name and release number.

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.

product family A group of products that are related by common functionality. The family names that can be searched using Interactive Service Repository are PeopleSoft Enterprise, PeopleSoft EnterpriseOne, PeopleSoft World, and third-party, certified PeopleSoft partners.

product line The name of a PeopleSoft product line or the company name of a third-party certified partner. Integration Services Repository enables you to search for integration points by product line.

programs In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.

progress log In PeopleSoft Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.

project transaction In PeopleSoft Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.

promotion In PeopleSoft Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.

prospects

In PeopleSoft Enterprise Campus Solutions, students who are interested in applying to the institution.

In PeopleSoft Enterprise Contributor Relations, individuals and organizations that are most likely to make substantial financial commitments or other types of commitments to the institution.

publishing

In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.

rating components

In PeopleSoft Enterprise Campus Solutions, variables used with the Equation Editor to retrieve specified populations.

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 *record input value-added tax flag.* 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 *record output value-added tax flag.*

See *record input VAT flag.*

recname

The name of a record that is used to determine the associated field to match a value or set of values.

recognition

In PeopleSoft Enterprise Campus Solutions, the recognition type indicates whether the PeopleSoft Enterprise Contributor Relations donor is the primary donor of a commitment or shares the credit for a donation. Primary donors receive hard credit that must total 100 percent. Donors that share the credit are given soft credit. Institutions can also define other share recognition-type values such as memo credit or vehicle credit.

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.

regional sourcing

In PeopleSoft Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.

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.

remote data source data Data that is extracted from a separate database and migrated into the local database.

REN server Abbreviation for *real-time event notification server* in PeopleSoft MultiChannel Framework.

requester In PeopleSoft eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.

reversal indicator In PeopleSoft Enterprise Campus Solutions, an indicator that denotes when a particular payment has been reversed, usually because of insufficient funds.

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.

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.

roll up In a tree, to roll up is to total sums based on the information hierarchy.

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.

SCP SCBM XML message Abbreviation for *Supply Chain Planning Supply Chain Business Modeler Extensible Markup Language message.* PeopleSoft EnterpriseOne Supply Chain Business Modeler uses XML as the format for all data that it imports and exports.

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.

search/match In PeopleSoft Enterprise Campus Solutions and PeopleSoft Enterprise Human Resources Management Solutions, a feature that enables you to search for and identify duplicate records in the database.

seasonal address In PeopleSoft Enterprise Campus Solutions, an address that recurs for the same length of time at the same time of year each year until adjusted or deleted.

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.

serial genealogy In PeopleSoft Manufacturing, the ability to track the composition of a specific, serial-controlled item.

serial in production In PeopleSoft Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.

service impact In PeopleSoft Enterprise Campus Solutions, the resulting action triggered by a service indicator. For example, a service indicator that reflects nonpayment of account balances by a student might result in a service impact that prohibits registration for classes.

service indicator In PeopleSoft Enterprise Campus Solutions, indicates services that may be either withheld or provided to an individual. Negative service indicators indicate holds that prevent the individual from receiving specified services, such as check-cashing privileges or registration for classes. Positive service indicators designate special services that are provided to the individual, such as front-of-line service or special services for disabled students.

session In PeopleSoft Enterprise Campus Solutions, time elements that subdivide a term into multiple time periods during which classes are offered. In PeopleSoft Contributor Relations, a session is the means of validating gift, pledge, membership, or adjustment data entry . It controls access to the data entered by a specific user ID. Sessions are balanced, queued, and then posted to the institution's financial system. Sessions must be posted to enter a matching gift or pledge payment, to make an adjustment, or to process giving clubs or acknowledgements.

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.

share driver expression In PeopleSoft Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.

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 key process In PeopleSoft Enterprise Campus Solutions, a process that relates a particular transaction to the source of the charge or financial aid. On selected pages, you can drill down into particular charges.

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.

speed key See *communication key.*

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.

staging A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.

standard letter code In PeopleSoft Enterprise Campus Solutions, a standard letter code used to identify each letter template available for use in mail merge functions. Every letter generated in the system must have a standard letter code identification.

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.

storage level In PeopleSoft Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.

subcustomer qualifier A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.

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 time period In PeopleSoft Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.

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 *basis* tree). A summary tree structure specifies the details on which the summary trees are to be built.

syndicate To distribute a production version of the enterprise catalog to partners.

system function In PeopleSoft Receivables, an activity that defines how the system generates accounting entries for the general ledger.

TableSet A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.

TableSet sharing Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.

target currency The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.

tax authority In PeopleSoft Enterprise Campus Solutions, a user-defined element that combines a description and percentage of a tax with an account type, an item type, and a service impact.

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.

third party A company or vendor that has extensive PeopleSoft product knowledge and whose products and integrations have been certified and are compatible with PeopleSoft applications.

3C engine Abbreviation for *Communications, Checklists, and Comments engine.* In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists, and comments. You define events and triggers to engage the engine, which runs the mass change and processes the 3C records (for individuals or organizations) immediately and automatically from within business processes.

3C group Abbreviation for *Communications, Checklists, and Comments group.* In PeopleSoft Enterprise Campus Solutions, a method of assigning or restricting access privileges. A 3C group enables you to group specific communication categories, checklist codes, and comment categories. You can then assign the group inquiry-only access or update access, as appropriate.

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.

trace usage In PeopleSoft Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.

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 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.

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.

tuition lock In PeopleSoft Enterprise Campus Solutions, a feature in the Tuition Calculation process that enables you to specify a point in a term after which students are charged a minimum (or *locked*) fee amount. Students are charged the locked fee amount even if they later drop classes and take less than the normal load level for that tuition charge.

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.

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.

update access In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user to edit and update data.

See also *inquiry access.*

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.

VAT exception Abbreviation for *value-added tax exception.* A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.

VAT exempt Abbreviation for *value-added tax exempt.* Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.

VAT exoneration Abbreviation for *value-added tax exoneration.* An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.

VAT suspension Abbreviation for *value-added tax suspension.* An organization that has been granted a temporary exemption from paying VAT.

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

work order In PeopleSoft Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.

worker A person who is part of the workforce; an employee or a contingent worker.

workset A group of people and organizations that are linked together as a set. You can use worksets to simultaneously retrieve the data for a group of people and organizations and work with the information on a single page.

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.

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.

XML link The XML Linking language enables you to insert elements into XML documents to create a links between resources.

XML schema An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.

XPI Abbreviation for *eXtended Process Integrator.* PeopleSoft XPI is the integration infrastructure that enables both real-time and batch communication with EnterpriseOne applications.

yield by operation In PeopleSoft Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.

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. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

Index

A

Accident Type Table (ACCIDN_TYPE_ TBL) component 5
Accident Type Table page 6
ACCIDN_TYPE_TBL component 5
Actions page 67
additional documentation xii
alcohol usage 54, 58
allergies
  defining codes 5
  tracking by employee 41
Allergy Table (HS_ALLERGY_TBL) component 5
Allergy Table page 7
Americans with Disabilities Act (ADA) 10
Animal page 15
Animal Table (HS_ANIMAL_TBL) component 14
Animal Table page 15
animals
  defining codes 15
  reporting incidents involving 59
Animals Involved in the Incident page 47
ANSI (American National Standards Institute) 6
Appeal Details page 105
application fundamentals xi
Audiometric Exam - Exam Details page 114, 119
Audiometric Exam/Address/Phone page 114
AUS, claim thresholds 21
Australia
  defining Medicare items 8

B

BC WCB, *See* WCB
Body Part Table (BODY_PART_TABLE) component 5
Body Part Table page 6
body parts
  defining codes 5
  reporting injuries to 73
BODY_PART_TABLE component 5
Break Details page 47
British Columbia Workers' Compensation Board, *See* WCB
business processes 1

C

Canada
  claims reporting to BC WCB 101
  entering long term earnings 86
  WCB 24, 125
cars 14
Case Officers page 27
Case Officers Table page 29
Claim Charges page 105
Claim Info Aus (Claim Threshold - Claim AUS) page 22
Claim Info Aus (Claim Threshold - State AUS) page 22
Claim Info Aus (Claim Threshold - Union AUS) page 22
Claim Info Aus (CLAIM_INFO_CLAIM) component 21
Claim Provider page 107
claim thresholds
  defining (AUS) 21
CLAIM_INFO_CLAIM component 21
claims
  assigning numbers 103
  entering details 105
  entering provider details 107
  opening 102
  reports 101
  tracking charges 105
  understanding 101
Class/Subclass page 25
Class/Subclass Table - CAN (HS_CLASS_CAN) component 24
clinics 17
Collect RIDDOR Data page 96
Collect WCB EDI Data page 128
comments, submitting xvi
common elements xvii
Company Property Table (COMPANY_PROP_TBL) component 14

COMPANY_PROP_TBL component 14
Consequent Actions (HS_INCIDENT_ACTION) component 92
contact information xvi
contributing factor types 26
Contributing Factors - CAN (HS_CONTFAC_CAN) component 24
Contributing Factors page 25, 26
Coop Society Data page 29, 31
Corrective Action page 28, 30
corrective actions
defining codes 28, 30
tracking 92
Corrective page 92
Create Employee Rehab Plan - Actions page 110, 112
Create Employee Rehab Plan - Claims page 110
Create Employee Rehab Plan - Restrictions page 110, 111
Create Non-Employee Rehab Plan - Actions page 110
Create Non-Employee Rehab Plan - Claims page 110
Create Non-Employee Rehab Plan - Restrictions page 110
Create WCB EDI File page 128
cross-references xv
Customer Connection website xii

D

damages 91
dangerous occurrences 10, 11
Dangerous Occurrences page 11
Dangerous Occurrences Table (HS_DANGER_OCC) component 10
Details DEU - Job Data page 140
DEU Collect Illness Report Data page 141
DEU Corrective Actions page 133, 139
DEU Employee Checklist page 132
DEU Illness Profile page 133
DEU Illness Tracking - Medical Details page 137
DEU Illness Tracking - Payment/Work page 136
DEU Illness Tracking (HS_ILLNESS_GER) component 71
DEU Illness Tracking component
Corrective Actions page 133
Illness Profile page 133
Job Detailspage 133
Job-Related Cause page 133
Medical Details page 133
Payment/Work page 133
Preventative Actions page 133
DEU Job Data page 135
DEU Job Details page 133
DEU Job-Related Cause page 133, 135
DEU Medical Details page 133
DEU Payment/Work page 133
DEU Preventative Actions page 133
diagnoses
defining codes 9
recording for injuries 78
Diagnosis Table (DIAGNOSIS_TABLE) component 5
Diagnosis Table page 7, 9
DIAGNOSIS_TABLE component 5
Disability and Discrimination Act 10
Disablement Type (HS_DISABL_TYPE_IND) component 16
Disablement Type page 16
disablement types 16
Disease Class page 28, 30
doctors, *See* physicians
documentation
printed xii
related xii
updates xii
Drug Test Data 1 page 115, 121
Drug Test Data 2 page 115, 122
drugs
role in incident 60
sensitivities 41
testing 121

E

earnings
longterm 86
lost due to disablement 16
EDI file
Canada WCB reporting 128
Edit Address page 47
effective dates 5
Employee Details page 37
Employee Health Card - Health Card 1 page 41
Employee Health Card - Health Card 2 page 41
Employee Injury Summary page 95

Employee Injury Summary: Details page 95
employment data 39
Employment page 37, 39
equipment 90
Equipment Details page 90
examinations, *See* medical examinations
External Scheme GBR 31
External Scheme page 32
Eye Exam - Exam Details page 114, 119
Eye Exam - Eye Exam Address/Phone page 115

F

Family Details page 43
family members 43

G

Germany
  case officers 140
  corrective actions 30, 139
  disease types 30
  employee circumstances 135
  hazard codes 31
  health and safety officials 29
  illness profiles 133
  illnesses 132, 135
  liability insurance 38
  liability insurance association reporting 27
  medical details 137
  medical exam information 132
  payment information 136
  preventative actions 30
  social insurance unit ID 29
  unsafe items 30
  work area data 30
glossary 143

H

Haz Condition/Materials Table page 11, 12
HAZ_CON_MATRL_TBL component 10
hazard codes 31
hazardous conditions
  defining 10, 12
  tracking 13
Hazardous Conditions/Materials (HAZ_CON_MATRL_TBL) component 10
hazardous materials 12
Health Card (GVT_HEALTH_CARD) component 40
health card information, maintaining 40
Health Card Review (HEALTH_CARD_RVW) component 40
Health Card Review 1 page 41
Health Card Review 2 page 41
Health Card Review 3 page 41
Health Card Review 4 page 41
hearing exams 119
hospitals 17
HS_ALLERGY_TBL component 5
HS_ANIMAL_TABLE component 14
HS_CLASS_CAN component 24
HS_CONTFAC_CAN component 24
HS_DANGER_OCC component 10
HS_DISABL_TYPE_IND component 16
HS_EXT_SCHEME_UK component 31
HS_ILLNESS_GER component 71
HS_IMMUN_TBL component 5
HS_INCIDENT component 95
HS_INCIDENT_ACTION component 92
HS_INJURY_ILL component 65
HS_MEDCARE_TBL_AUS component 5
HS_MEDCATN_TBL component 5
HS_MEDICAL_FAC component 17
HS_OCC_ILLNESS_TBL component 5
HS_OCCUPATION_CAN component 24
HS_PHYSICIAN_DATA component 17
HS_PREVENT_ACT_CAN component 24
HS_TRANSPORT_TBL component 14
HSE reporting 31

I

illness report, Germany 141
illnesses, *See* occupational illnesses
Immunization Table (HS_IMMUN_TBL) component 5
Immunization Table page 8
immunizations
  defining codes 8
immunizations, tracking 41
Incident Details - Description page 47, 54
Incident Details - Incident page 46, 48

Incident Details - Location page 47, 55
Incident Details - Notification page 46, 53
Incident Details - People page 47, 60
Incident Details - People: Contact Address page 48
Incident Details - Reporting page 48, 62
Incident Details - Travel page 47, 58
Incident Details (HS_INCIDENT) component 95
Incident Location Address page 47
incidents 64, 73
See Also injuries; occupational illnesses
adding and updating 48
assigning numbers 45, 50
BC WCB reporting 125
defining claims thresholds (AUS) 21
describing an injury or illness 70
entering details 46
entering employee data 37
entering non-employee data 33
entering travel-related details 58
entering vehicle and equipment details 91
identifying connected people 60
maintaining notification data 62
recording 45
recording notification details 53
reporting the location 55
taking corrective action 92
taking preventative action 94
tracking consequent actions 92
tracking data by individual 95
India 16
injuries
defining codes 5
defining work restrictions 19
documenting medical treatment 75
entering descriptions 70
entering details 64, 73
entering diagnoses 78
entering work related details 81
modifying work duties 19
recording statements 72
recording work related 67
tracking data by individual 95
tracking reporting details 86
viewing an employee summary 95
Injury Details - 1st Aid page 66, 75
Injury Details - 1st Aid: Ambulance Details page 66
Injury Details - Description page 65, 70
Injury Details - Details page 66, 73
Injury Details - Details: Accident Type 66
Injury Details - Details: Body Parts page 66
Injury Details - Details: Nature of Injury page 66
Injury Details - Details: Source of Injury page 66
Injury Details - Details: Unsafe Act page 66
Injury Details - Diagnoses page 66, 78
Injury Details - Diagnoses: Medical Facility Address page 67
Injury Details - Injury page 65, 67
Injury Details - Reporting page 67, 86
Injury Details - Statements page 66, 72
Injury Details - Work-Related page 67, 81
Injury Details - Work-Related: Wage Inclusions page 67
Injury Details (HS_INJURY_ILL) component 65
Injury Nature Table (INJURY_NATURE_TBL) component 5
INJURY_NATURE_TBL component 5
INJURY_SOURCE_TABLE component 5
insurance 60
integrations 2

J

Job Code Hazards Table (JOBCODE_HAZRDS_TBL) component 10
Job Code Hazards Table page 11, 13
JOBCODE_HAZRDS_TBL component 10

L

leave of absence 78
liability insurance 38
Location Hazards Table (LOCATN_HAZRDS_TBL) component 10
Location Hazards Table page 11, 13
locations
hazardous 13
recording for incidents 55

LOCATN_HAZRDS_TBL component 10
Long Term Earnings page 67

M

medical examinations
drug testing 121
eye exams 119
hearing exams 119
physical exams 117
respiratory exams 120
tracking results 113
medical examinations, Germany 131
Medical Facilities Table (HS_MEDICAL_FAC) component 17
Medical Facility page 18
medical treatment
entering diagnoses 78
recording 75
Medicare (AUS) 8
Medicare Table Australia (HS_MEDCARE_TBL_AUS) component 5
Medicare Tbl Aus page 8
Medication Table (HS_MEDCATN_TBL) component 5
Medication Table page 8
medications
defining codes 8
medications, tracking 41
Mexico
mixed committees 96
training legal requirements 97
Mixed Committee page 97
mixed committees
associating with an incident 52
defining 96
MMA Partners xii
Modified Work Table (MODIFIED_WORK_TBL) component 19
Modified Work Table page 20
MODIFIED_WORK_TBL component 19

N

Nature of Injury Table page 6
Non-Employee - Address page 34
Non-Employee - Extra Details page 34, 35
Non-Employee - Name page 34
Non-Employee - Personal Details page 34, 35
non-employees 33
notes xv

O

OCC_ILLNESS component 5
Occupation page 25
occupational classifications 25
Occupational Illness page 7
Occupational Illness Table (HS_OCC_ILLNESS_TBL) component 5
Occupational Illness Table France (OCC_ILLNESS) component 5
Occupational Illness Table page 8
occupational illnesses
defining codes 5, 8
defining diagnoses codes 9
defining work duties and restrictions 19
recording details 73
recording for an incident 70
tracking by individual 95
Occupational Illnesses Table page 7
Occupational Table - CAN (HS_OCCUPATION_CAN) component 24
Occupations page 25
Open Claim - Claim Charges page 102
Open Claim - Claim Details page 102
Open Claim - Claim Details: Appeal Details page 102, 105
Open Claim - Claim Provider page 102
Open Claim - Claim Provider: Contact's Work Address page 102
Open Claim - Claim Provider: Payments and Deposits page 102
Open Claims - Payments and Deposits page 106

P

PeopleBooks
ordering xii
PeopleCode, typographical conventions xiv
PeopleSoft application fundamentals xi

Physical Exam - Exam Details page 114, 117
Physical Exam Address/Phone page 114, 115
Physician Table - Address page 18
Physician Table - Name page 18
Physician Table (HS_PHYSICIAN_DATA) component 17
physicians 18
prerequisites xi
preventative actions 26, 94
Preventative Actions page 25, 26, 28, 30
Preventative Actions Table - CAN (HS_PREVENT_ACT_CAN) component 24
Preventative page 92, 94
printed documentation xii
Prior Disability page 66
Prior Health Condition page 66
property 14

R

rehabilitation
  associating with an incident 110
  processing 101
  recording plan details 112
  restricting work and duties 111
  tracking plans 109
related documentation xii
reports, for Germany 131
Respiratory Exam - Exam Details page 115, 120
Respiratory Exam - Respiratory Exam Addr/Phone page 115
respiratory exams 120
restrictions 19
Return To Work page 67
Route Details page 47

S

setIDs 6
SI Unit page 28, 29
Source of Injury Table (INJURY_SOURCE_TABLE) component 5
Source of Injury Table page 7
suggestions, submitting xvi

T

terms 143
tests, *See* medical examinations
Transport page 15
Transport Table (HS_TRANSPORT_TBL) component 14
transportation
  defining codes 15
  recording incident-related data 58
travel 58, 60
treatment 70, 75
typographical conventions xiv

U

United Kingdom
  Disability and Discrimination Act 10
  external schemes 32, 39, 40
  HSE reporting 31
  RIDDOR data 96
Unsafe Act Table (UNSAFE_ACT_TBL) component 5
Unsafe Act Table page 7
unsafe acts 5
Unsafe Item page 28, 30
UNSAFE_ACT_TBL component 5

V

Vehicle/Equipment Accident Details page 46
Vehicle/Equipment Incident Details: Car Details page 90
Vehicle/Equipment page 90, 91
vehicles 90
visual cues xv

W

Wage Additions page 67
warnings xv
WCB 24, 125
WCB Form 7 Detail page 67
witnesses 60, 72
Work Area Category page 29, 30
Work Area Class page 28, 30
Work Area page 29, 31
work restrictions 19
Work Restrictions Table (WORK_RESTRICT_TBL) component 19
Work Restrictions Table page 20
WORK_RESTRICT_TBL component 19
Workers' Compensation Board, *See* WCB