JD Edwards EnterpriseOne Applications

Health and Safety Incident Management Implementation Guide

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JD Edwards EnterpriseOne Applications Health and Safety Incident Management Implementation Guide, Release 9.1

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Preface

Welcome to the JD Edwards EnterpriseOne Applications Health and Safety Incident Management Implementation Guide.

Audience

This guide is intended for implementers and end users of the JD Edwards EnterpriseOne Health and Safety Incident Management system.

JD Edwards EnterpriseOne Products

This implementation guide refers to these JD Edwards EnterpriseOne products from Oracle:

- JD Edwards EnterpriseOne Address Book Implementation guide

- JD Edwards EnterpriseOne Human Capital Management Fundamentals Implementation guide

- JD Edwards EnterpriseOne Human Resources Implementation guide

- JD Edwards EnterpriseOne Capital Asset Management Implementation guide

- JD Edwards EnterpriseOne Job Cost Implementation guide

- JD Edwards EnterpriseOne Inventory Management Implementation guide

- JD Edwards EnterpriseOne Payroll Implementation guide

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Related Documents

You can access related documents from the JD Edwards EnterpriseOne Release Documentation Overview pages on My Oracle Support. Access the main documentation overview page by searching for the document ID, which is 1308615.1, or by using this link:

https://support.oracle.com/CSP/main/article?cmd=show&type=NOT&id=1308615.1

To navigate to this page from the My Oracle Support home page, click the Knowledge tab, and then click the Tools and Training menu, JD Edwards EnterpriseOne, Welcome Center, Release Information Overview.

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

1

Introduction to JD Edwards EnterpriseOne Health and Safety Incident Management

This chapter contains the following topics:

- Section 1.1, "JD Edwards EnterpriseOne Health and Safety Incident Management Overview"
- Section 1.2, "JD Edwards EnterpriseOne Health and Safety Incident Management Business Processes"
- Section 1.3, "JD Edwards EnterpriseOne Health and Safety Incident Management Integrations"
- Section 1.4, "JD Edwards EnterpriseOne Health and Safety Incident Management Implementation Steps"

1.1 JD Edwards EnterpriseOne Health and Safety Incident Management Overview

Incidents lead to lost time, lost productivity, and delay in the delivery of services, along with significant costs. It also involves human losses as a result of occupational incidents.

The JD Edwards EnterpriseOne Health and Safety Incident Management system is an integrated solution. You use the insight gained from analysis of incidents to focus resources where they are best needed, such as incident prevention. An integrated solution combines personnel, facility, operational, and asset management data to effectively leverage organizational information. The JD Edwards EnterpriseOne Health and Safety Incident Management system provides a comprehensive, yet easy to use solution to report and manage incidents of all types and that includes potential incidents such as near misses. You can record costs and assign tasks related to incidents. One View Reporting provides an analytical tool to gain important insight.

You can generate all the Occupational Safety and Health Administration (OSHA) and Bureau of Labor Statistics (BLS) reports in a ready-to-submit format.

1.1.1 Mobile Applications for Health and Safety Incident Management (Release 9.1 Update)

The following mobile applications are available, and can be used to manage health and safety incidents on a mobile device:

- Report an Incident (Tablet and Smartphone)
- Incident Scoreboard (Tablet and Smartphone)

These applications require system administrator configuration before they are available to individual users. Contact your system administrator to determine whether these applications are available for use.

Additionally, see the following topics in the JD Edwards EnterpriseOne Applications Mobile Enterprise Applications Implementation Guide:

- Report an Incident Mobile Applications
- Incident Scoreboard Mobile Applications

1.2 JD Edwards EnterpriseOne Health and Safety Incident Management Business Processes

This process flow diagram illustrates the JD Edwards EnterpriseOne Health and Safety Incident Management business process (Release 9.1 Update):

Figure 1–1 Health and Safety Incident Management Business Process
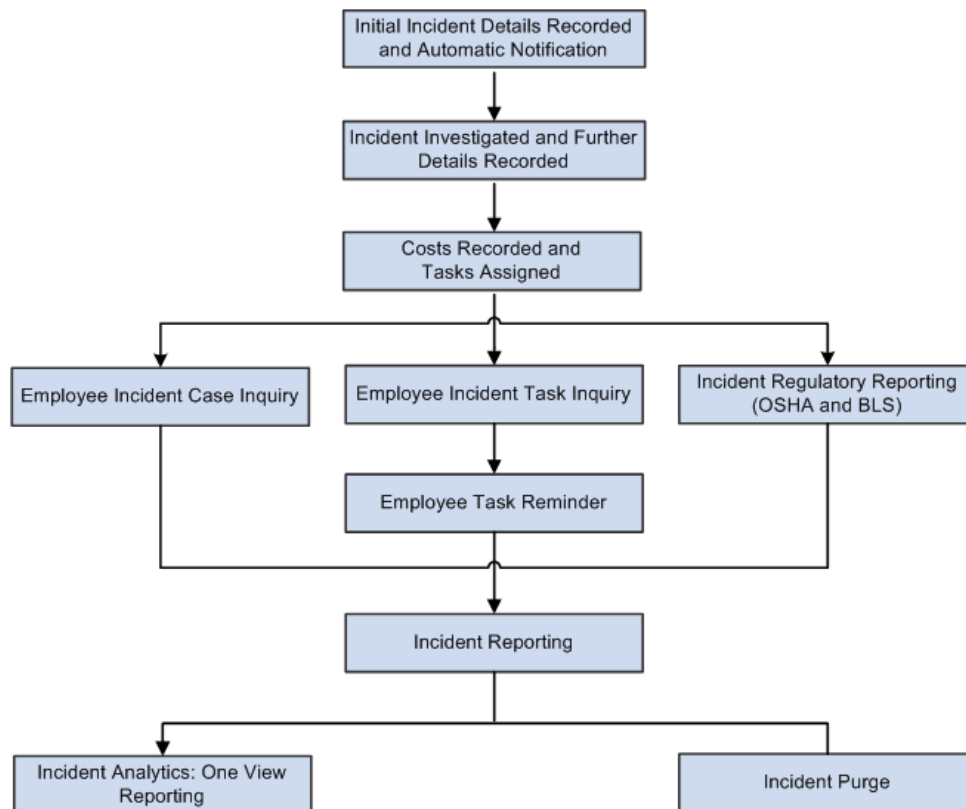
This business process flow explains the processes involved in incident tracking and reporting using the JD Edwards EnterpriseOne Health and Safety Incident Management system. You enter the incident using the Incident Master program (P54HS00) or the Report an Incident program (P54HS30) or the mobile Report an Incident applications. The system automatically notifies the people who need to know about the incident, such as the company safety officer and other interested parties. The reported incident and recordable cases are investigated and additional details are recorded in the system. You can assign tasks and enter costs associated with the incident. Employees are able to review the case logs using the Case Inquiry program (P54HS210) as required by OSHA or review tasks using the Incident Task Inquiry program (P54HS215) (Release 9.1 Update). Finally, you can use One View Reporting

programs to analyze the incident, frequency rates, and other safety metrics. People can be reminded of tasks that are due or are overdue (Release 9.1 Update).

1.3 JD Edwards EnterpriseOne Health and Safety Incident Management Integrations

The JD Edwards EnterpriseOne Health and Safety Incident Management system integrates with these JD Edwards EnterpriseOne systems:

- Address Book
- General Accounting
- Human Capital Management
- Human Resources
- Payroll
- Capital Asset Management
- Job Cost
- Inventory Management

Integration considerations are discussed in the implementation chapters in this implementation guide. Supplemental information about third-party application integrations is located on `http://support.oracle.com`.

1.3.1 JD Edwards EnterpriseOne Address Book

The JD Edwards EnterpriseOne Address Book system from Oracle stores information for employees, contractors, establishments, agencies, and equipment operators or drivers to add to an incident. Using the address book information, you can locate employee information to add to an incident through the Health and Safety Incident Management system.

1.3.2 JD Edwards EnterpriseOne General Accounting

You use the JD Edwards EnterpriseOne General Accounting system from Oracle to set up companies and business units. You can associate incidents with business units and companies.

1.3.3 JD Edwards EnterpriseOne Human Capital Management

You use the JD Edwards EnterpriseOne Human Capital Management system from Oracle to track and share employee information. You can use this information to add an incident through the JD Edwards EnterpriseOne Health and Safety Incident Management system.

1.3.4 JD Edwards EnterpriseOne Human Resources

You use the JD Edwards EnterpriseOne Human Resources system from Oracle to set up OSHA establishment information. The establishment itself is an address book record.

1.3.5 JD Edwards EnterpriseOne Payroll

You use the JD Edwards EnterpriseOne Payroll system from Oracle to access payroll information to determine both safety hours and the number of employees. This is optional, but is available for those using the payroll system.

1.3.6 JD Edwards EnterpriseOne Capital Asset Management

You use the JD Edwards EnterpriseOne Capital Asset Management system from Oracle to provide equipment, property, or motor vehicle information to incidents that you enter through the JD Edwards EnterpriseOne Health and Safety Incident Management system.

Additionally, you can use failure analysis to associate failure codes with incidents. You can set up failure codes for health and safety incident management within the JD Edwards EnterpriseOne Capital Asset Management system.

1.3.7 JD Edwards EnterpriseOne Job Cost

You use the JD Edwards EnterpriseOne Job Cost system from Oracle to provide information about projects. Some organizations may want to associate incidents to projects and track incident rates for each project.

1.3.8 JD Edwards EnterpriseOne Inventory Management

You use the JD Edwards EnterpriseOne Inventory Management system from Oracle to track incidents that have environmental impacts. You can associate a product or substance that is spilled or released as a result of the incident. You can select this information from the Item Master program (P4101) in the JD Edwards EnterpriseOne Inventory Management system.

1.4 JD Edwards EnterpriseOne Health and Safety Incident Management Implementation Steps

This section provides an overview of the steps that are required to implement the JD Edwards EnterpriseOne Health and Safety Incident Management system.

In the planning phase of your implementation, take advantage of all Oracle sources of information, including the installation guides and troubleshooting information.

When determining which electronic software updates (ESUs) to install for JD Edwards EnterpriseOne Health and Safety Incident Management system, use the EnterpriseOne and World Change Assistant. EnterpriseOne and World Change Assistant, a Java-based tool, reduces the time required to search and download ESUs by 75 percent or more and enables you to install multiple ESUs at one time.

See *JD Edwards EnterpriseOne Tools Software Updates Guide*

1.4.1 Global Implementation Steps

The global implementation steps for the JD Edwards EnterpriseOne Health and Safety Incident Management system are:

- Set up fiscal date patterns, companies, and business units.

  See: "Setting Up Organizations" in the *JD Edwards EnterpriseOne Applications Financial Management Fundamentals Implementation Guide*

■ Enter address book records.

> **See:** "Entering Address Book Records" in the *JD Edwards EnterpriseOne Applications Address Book Implementation Guide*

■ Set up Human Capital Management fundamental information.

> **See:** "Setting Up System Options" in the *JD Edwards EnterpriseOne Applications Human Capital Management Fundamentals Implementation Guide*

■ Set up global user-defined code (UDC) tables.

> **See:** "Working With User Defined Codes" in the *JD Edwards EnterpriseOne Tools System Administration Guide*.

■ Set up establishments.

> **See:** "Understanding OSHA Establishment Reporting Information" in the *1055779 Human Resources Implementation Guide*

1.4.2 Health and Safety Incident Management Implementation Steps

The core implementation steps for the JD Edwards EnterpriseOne Health and Safety Incident Management system are:

■ Set up user-defined codes.

> **See:** Section 2.4, "Setting Up User-Defined Codes (UDCs)"

■ Set up next numbers.

> **See:** Section 2.9, "Understanding Next Numbers"

■ Set up external safety hours.

> **See:** Section 2.6, "Understanding Safety Hours"

■ Set up Composite Application Framework (CafeOne).

> **See:** Section 2.8, "Setting Up Composite Application Framework"

2

Setting Up the JD Edwards EnterpriseOne Health and Safety Incident Management System

This chapter contains the following topics:

2.1 Understanding the JD Edwards EnterpriseOne Health and Safety Incident Management System

Effective workplace health and safety programs help to save the lives of workers by reducing hazards and their consequences. They can have positive effects on both worker morale and productivity, and can save employers a great deal of money. Workplace incidents cost an organization large amounts of money, lost productivity, and decreased competitiveness. The JD Edwards EnterpriseOne Health and Safety Incident Management system provides features that you can use to track and report incidents, such as:

- Incident tracking.

- Investigation, cost, and follow-up action items.

- Injury or illness case information.

- Email notification of incident.

- Detailed incident report.

- One View Reporting of incidents.

- Health and Safety OSHA and BLS reports (OSHA - Occupational Safety and Health Administration and BLS - Bureau of Labor Statistics).

- Health and Safety EnterpriseOne pages.

2.1.1 Incident Tracking

Most employers are required to maintain information about incidents that involve illness or injuries sustained by the employees as a result of performing their job duties. Incidents may involve people, equipment, property damage, motor vehicles, environmental factors, agencies, security incidents, unsafe conditions and so on. The JD Edwards EnterpriseOne Health and Safety Incident Management system enables you to track all types of incidents and their details and send an email notification to the interested parties.

You use the Report an Incident program (P54HS30 or the mobile applications) and Incident Master program (P54HS00) for entering and tracking incidents in the JD Edwards EnterpriseOne Health and Safety Incident Management system. The Report an Incident program is a quick add program that is customized to use on a tablet device. Any employee can use this program to enter the initial details of an incident such as what, when, who, and where. The Incident Master program is a comprehensive program. The incident handler and safety officer use this program to enter detail information of the incident and enter and track costs and assign tasks.

2.1.2 Investigation, Cost, Follow-Up Actions Items, and Incident Task Inquiry (Release 9.1 Update)

Typically, after an incident is recorded in the JD Edwards EnterpriseOne Health and Safety Incident Management system, it is investigated. In the process of investigating an incident, you determine further details and the extent of the incident, direct and root cause of an incident, and take preventive or remedial actions. During the investigation, you also record information about who is investigating, who is handling the incident, and the information determined from the investigation. You capture any estimated or actual costs related to the incident. You can also associate an incident with a work order and display the estimated and actual work order costs. Tasks can be assigned to and viewed by individuals related to an incident. You will also be reminded of tasks that are due or are overdue via an email or a Work Center message.

2.1.3 Injury or Illness Case Information

You can track occupational injuries and illnesses by entering an injury or illness case along with the information that many governmental health and safety management organizations require.

You can track detailed information about any injuries or illnesses that the employees suffer during the performance of their jobs within the organization. This information includes the following, but it is not limited to:

- Date of incident

- Time of incident

- Description of incident

- Employee name

- Description of the injury or illness

- Part of body affected

You use the injury or illness case information to create and print regulatory health and safety reports.

After you enter the required information for an injury or illness, you can enter information about any additional injuries or illnesses for the person related to the same incident. Additional data includes any information that you want to track about injuries and illnesses, regardless of whether you need to report the case to governmental health and safety organizations.

To support the OSHA requirements to give all employees access to the information recorded for an injury or illness case, the JD Edwards EnterpriseOne Health and Safety Incident Management system provides a special view-only program, the Incident Case Inquiry program (P54HS210). This program provides a view of the data recorded on the OSHA 300 Log Report of the Work-Related Injuries and Illnesses and the OSHA 301 Injury/Illness Report, in the *Tell us about your case* section.

> **Note:** The terms 'incident' and 'case' are used in the JD Edwards EnterpriseOne Health and Safety Incident Management system. An incident refers to a single occupational health or safety event at an organization. A case refers specifically to an injury or illness to an employee as a result of an incident. An incident can have several employees who are injured and therefore result in several cases. A single injured employee can have several injuries related to the same incident, but only the most severe injury is recorded as a case. The system allows you to record information about the additional injuries. However, the most severe injury is typically the one reported, and therefore you can record only one injury or illness as a case per employee per incident. The system tracks non-employees who are injured but cases would not be created for them. You use OSHA and BLS reports to report case information. Tracking all injured people and their injuries is important as you analyze incidents. You use the Incident People table (F54HS02) to record case information, and Incident Injury/ Illness table (F54HS021) to record additional injuries.

2.1.4 Email Notification of Incident

When you record an incident, the system automatically notifies the interested parties. In addition to the email address of the incident's originator, you can provide an additional individual's email address by completing a processing option. You can also use an email distribution list. You add the additional email addresses to the incident using the Incident Master program (P54HS00). The system retrieves email addresses from the Address Book Who's Who Email/Internet Information program (P01111). When the incident is entered, emails are sent to the interested parties. If the system cannot locate an email address, it sends a message to the work center using a *send message* command. (Release 9.1 Update) A link is embedded in the email that points to the incident record. When you click the link, the system uses the version of the application used at the time the email was generated.

2.1.5 Detailed Incident Report

The Detailed Incident Report program (R54HS00) displays the details for a single incident such as incident number, date and time, description of the incident, incident

type classifications, location or organization, third party or contractor responsible for an incident, associated costs, investigation, agencies, people involved, additional injuries/illnesses and so on.

2.1.6 One View Reporting of Incidents

You use the One View Reporting programs to analyze and summarize health and safety incidents. The JD Edwards EnterpriseOne Health and Safety Incident Management system includes five One View Reporting programs:

- One View Incident Summary Inquiry program (P54HS220).
- One View Incident People Inquiry program (P54HS230).
- One View Incident Equipment Inquiry program (P54HS240).
- One View Environmental Incident Inquiry program (P54HS250).
- One View Safety Statistics Inquiry program (P54HS260).

Each of these One View Reporting programs enables you to analyze incidents and their various aspects and attributes, and determine your incident rates and safety metrics.

2.1.7 Health and Safety OSHA and BLS Reports

The Occupational Safety and Health Administration (OSHA) record-keeping rules require employers in higher-hazard industries with more than ten employees to keep accurate and complete records of work-related injuries and illnesses. OSHA requires employers to track and report health and safety incidents for each calendar year. To report injury and illness statistics to OSHA, you use the health and safety reports provided by OSHA. The JD Edwards EnterpriseOne Health and Safety Incident Management system produces three reports for each establishment for each year:

- OSHA Form 300 - Log of Work-Related Injuries and Illnesses (R54HS300).
- OSHA 300A Summary of Work-Related Injuries and Illnesses (R54HS300A).
- OSHA Report 301 - Illness Incident Report (R54HS301).

Additionally, employers may be requested by the Bureau of Labor Statistics (BLS) to complete and submit a Survey of Occupational Injuries and Illnesses form (BLS-9300 N06). The JD Edwards EnterpriseOne Health and Safety Incident Management system also produces this BLS report (R54HS320).

(Release 9.1 update) You can submit the OSHA 300A report electronically through the OSHA Injury Tracking Application (ITA). You can create a CSV file to be used to submit the 300A electronically via OSHA's Injury Tracking Application.

2.1.8 Health and Safety EnterpriseOne Pages

The JD Edwards EnterpriseOne Health and Safety Incident Management system provides two JD Edwards EnterpriseOne pages, which are the Incident Self Service page and the Health and Safety Incidents EnterpriseOne page. These two pages provide a Safety Scoreboard. This portlet displays the number of days since the last incident, and the number of days since the last recordable incident. The Incident Self Service EnterpriseOne page enables your employees to access the Report an Incident, and Incident Case Inquiry programs, whereas the Health and Safety Incidents EnterpriseOne page enables your safety officers to access all the essential functions that a corporate safety officer needs.

2.1.9 Task Tickler Reminder (Release 9.1 Update)

You use the Task Tickler Reminder program (R54HS420) to send reminder messages to people associated with incident tasks. Processing options enable you to define the number of days in advance of or after the Task Ending Date to identify tasks that are due or are overdue. You also select who will be reminded: Task Assignee, Task Assignee's Supervisor, Incident Handler, Incident Investigator, Incident Reported By, or Incident Originator. You can print a report showing which tasks were selected and where messages were sent as reminders.

2.2 Understanding General System Setup

Before using any features in the JD Edwards EnterpriseOne Health and Safety Incident Management system, you need to define critical information that the system uses for processing. You also need to define information that you will use to enter data throughout the system. This table describes the information that you must set up before you begin using the JD Edwards EnterpriseOne Health and Safety Incident Management system:

Topic	Description
Email Distribution Groups	Set up email distribution groups to send an email notification to the interested parties after the incident is recorded. Section 2.7, "Setting Up Email Distribution Groups"
External Safety Hours	Set up external safety hours to calculate the reporting and analytical information unless you retrieve this information from the JD Edwards EnterpriseOne Payroll system tables. If you are not using the JD Edwards EnterpriseOne Payroll system, you will need to enter external safety hours and the average annual number of employees using the Safety Hours Entry program (P54HS20). Section 2.6, "Understanding Safety Hours"
Composite Application Framework	Set up Composite Application Framework to display a map showing the incident location using either the address fields or the Latitude/Longitude fields. Section 2.8, "Setting Up Composite Application Framework"
Establishments	Set up establishments for OSHA reporting in the address book records. You use the Establishment Condition program (P086011) to enter a condition record for each establishment for each calendar year being reported. (Release 9.1 Update) To default the establishment, when creating a new incident for each user who enters incidents into the system, you must set up the establishment in the Employee Supplemental Data program. Section 2.11, "Understanding Establishments"
Companies, Business Units, and Projects	Set up companies using the Company Master program (P0010). Set up business units and projects using the Business Unit Master program (P0006). You can associate incidents with companies, business units, and projects. This is useful for analyzing incidents by these different organizational units. See: "Setting Up Companies" in the *JD Edwards EnterpriseOne Applications Financial Management Fundamentals Implementation Guide* See: "Setting Up Business Units" in the *JD Edwards EnterpriseOne Applications Financial Management Fundamentals Implementation Guide*

Topic	Description
Home Business Unit and Home Company	To default the company and business unit fields, when creating a new incident for each user who enters incidents into the system, set up their home company and home business unit in the Employee Master program (P0801). Then make sure that the Employee Profile Setup program (P20103) is set to use the Employee Master as the Source Table.
Address Book Records	Set up address book records using the Address Book Master program (P01012). Address book records are used for establishments, employees, agencies, contractors, distribution lists, and facilities. You do not have to use address book records for employees, but if you do, the system uses the default values of many of the fields related to the employee. There are some fields on the incident record that must have a valid address book record if you want to use them. These fields include Establishment, Distribution List, Individuals to be Notified, Contractor Responsible for Product (on the Environmental Impact record), Originator, Reported By, Investigated By, Incident Handler, Foreman, Mentor, Supervisor, Facility (medical), and Contractor/3rd Party.
Inventory Items	For incidents that have an environmental impact, you can associate products or substances spilled or released with the incident. You may want to select this from the Inventory Item Master, although it is optional. You can set up products or substances in the Inventory Item Master program (P4101). The system does not use the item branch record.
Equipment, Property, and Motor Vehicles	Many times, incidents involve motor vehicles or result in damage to property or equipment. You can use the information already set up in the Asset Master table for company owned equipment, but it is optional. You use the Work with Equipment Master program (P1701) and the License Information program (P1206) to set up equipment or assets.
Work Orders	If you want to use work orders to track remedial actions and related costs for incidents, you must set up work orders in one of the many work order programs. You can then associate the incident with the work order and display the actual and estimated work order costs in the Costs section of the incident master. If a parent work order number is associated with an incident, the costs shown will include the costs of the children work orders.

2.3 Understanding Tables Used by the JD Edwards EnterpriseOne Health and Safety Incident Management System

The tables indicated have an accompanying change history table to record all add, delete, and updates to the base table. This list includes the primary tables in the JD Edwards EnterpriseOne Health and Safety Incident Management system used to record incident information:

Table	Description
Incident Master (F54HS01)	Contains detailed information about the company, business unit, establishment, project number, contractor or third party or party responsible for incidents. This table also contains incident descriptions, date, location, causal details, and other information related to the specific incident.

Table	Description
Incident People (F54HS02)	Contains detailed information of the people involved in an incident in any role. This table also includes information of primary injury or illness of injured people with related recordable case details.
Incident Injury/Illness Details (F54HS021)	Contains information about any additional injuries or illnesses of an injured person related to an incident.
Incident Equipment (F54HS03)	Contains detailed information for any property, equipment or motor vehicle involved in an incident.
Incident Agencies (F54HS04)	Contains information about any agency, department, or group related to an incident.
Incident Notification Members (F54HS05)	Contains information about distribution lists or individuals to notify about the incident.
Incident Notifications Sent (F54HS05H)	Contains information about any individual or distribution list to which a notification is sent.
Incident Tasks (F54HS06)	Contains detailed information about the tasks assigned related to the incident.
Incident Costs (F54HS07)	Contains detailed information about any actual or estimated costs related to the incident.
Incident Environmental Impact (F54HS08)	Contains detailed information about any environmental impact related to the incident such as the product or substance that spilled, quantity, environmental impact, and so on.
Safety Hours (F54HS20)	Contains both safety hours and average annual number of employees for all establishments, business units, projects, companies, and contractors for each calendar year. The system uses this information when calculating incident rates.

2.4 Setting Up User-Defined Codes (UDCs)

Many programs in the JD Edwards EnterpriseOne Health and Safety Incident Management system use user-defined codes (UDCs). Most of the UDCs for the JD Edwards EnterpriseOne Health and Safety Incident Management system are shipped with predefined data. To meet your business needs, you can add, change, or delete predefined data that is not hard-coded.

2.4.1 Incident User-Defined Codes

This table lists the user-defined codes for incidents.

UDC Code	System Usage
Type of Incident Cost	Indicates the type of cost related to the incident. The values are stored in the UDC table (54HS/CT).
Drug and Alcohol Result	Indicates the drug and alcohol testing results. The values are stored in the UDC table (54HS/DR).
Incident Causal Factor	Indicates the causal factor of the incident. The values are stored in the UDC table (54HS/FC).

UDC Code	System Usage
Incident Frequency	Indicates the frequency that an incident of this type might occur or has occurred. This is used as a measure of risk. The values are stored in the UDC table (54HS/FR).
Insurance Claim Status	Indicates the status of the insurance claim related to the incident. The values are stored in the UDC table (54HS/IS).
Other Classification	Indicates additional information when the Other option is selected in the Incident Classifications form in the Incident Master program. For example, you might use this UDC to specify that a fire or explosion occurred, that unsafe conditions are observed, or that a safety inspection or audit occurred. The values are stored in the UDC table (54HS/OC).
Potential Recurrence	Indicates the type of potential recurrence for an incident. The values are stored in the UDC table (54HS/PR).
Party Responsible Code	Indicates the type of party responsible for the incident. The values are stored in the UDC table (54HS/RS).
Security Classification	Indicates the type of security incident. The values are stored in the UDC table (54HS/SC).
Incident Status	Indicates the current status of the incident. The values are stored in the UDC table (54HS/ST). **Note:** You can use the Special Handling Code for the Incident Status UDC (54HS/ST) to lock the incident. Locking the incident will prevent users from making further edits. A value of "L" in the Special Handling Code column will always lock an incident when the incident is set to that status, regardless of the processing option for conditional locking. A value of "X" or "A" will conditionally lock the incident from further edits if the corresponding processing option is turned on. "X" will lock the incident and activities from further edits, and "A" will lock the incident but allow edits for the activities.
Incident Severity	Indicates the severity of the incident. The values are stored in the UDC table (54HS/SV). The values for this UDC are color-coded.
Incident Task Type	Indicates the type of task assigned to the incident. The values are stored in the UDC table (54HS/TT).
Safety Metric Basis	Indicates the basis for the safety metrics for the incident. The value Hours is hard-coded but other values can be added. OSHA requires safety metrics, such as incident rate, to be based on hours. The values are stored in the UDC table (54HS/MB).

UDC Code	System Usage
Record Type (Release 9.1 Update)	Indicates the type of incident record, such as safety observation, safety inspection, near miss, or reportable incident. The values are stored in the UDC table (54HS/RT). This field is intended for future use with incident status activity rules and incident workflow approval.

2.4.2 Incident People User-Defined Codes

This table lists the user-defined codes for people involved in the incidents.

UDC Code	System Usage
Age Group	Identifies the age group for a person involved in the incident. The values are stored in the UDC table (54HS/AG).
Primary Causal Factor	Indicates the primary cause of the illness or injury. The values are stored in the UDC table (54HS/CF).
Injury Classification	Indicates the injury or illness classification of incidents used by OSHA and the Bureau of Labor Statistics. These hard-coded values include First Aid, Days Away From Work, Restricted Work, and so on. The values are stored in the UDC table (54HS/IC).
Insurance Claim Reason	Indicates the reason for an insurance claim related to the incident for an illness or injury. The values are stored in the UDC table (54HS/IR).
OIICS Code 1 - Nature of illness	Indicates the principal physical characteristics of the overall work related injury or illness, such as traumatic injuries, disorders, and diseases. This code represents a code from the Occupational Illness and Injury Classification System (OIICS, Bureau of Labor Statistics) publication. This code is reserved for future use in anticipation of adoption of the OIICS codes. It does not appear on any forms but is in the database. The values are stored in the UDC table (54HS/O1).
OIICS Code 2 - Part of Body	Indicates the part of the body directly affected by the nature of the illness or injury. This code represents a code from the Occupational Illness and Injury Classification System (OIICS, Bureau of Labor Statistics) publication. This code is reserved for future use in anticipation of adoption of the OIICS codes. It does not appear on any forms but is in the database. The values are stored in the UDC table (54HS/O2).

UDC Code	System Usage
OIICS Code 3 - Source of Inquiry	Indicates the objects, substances, equipment, and other factors responsible for the worker's overall injury or illness incurred, or that precipitated the event or exposure. This code represents a code from the Occupational Illness and Injury Classification System (OIICS, Bureau of Labor Statistics) publication. This code is reserved for future use in anticipation of adoption of the OIICS codes. It does not appear on any forms but is in the database. The values are stored in the UDC table (54HS/O3).
OIICS Code 4 - Event/Exposure	Indicates the manner in which the injury or illness is produced or inflicted by the source of injury or illness. This code represents a code from the Occupational Illness and Injury Classification System (OIICS, Bureau of Labor Statistics) publication. This code is reserved for future use in anticipation of adoption of the OIICS codes. It does not appear on any forms but is in the database. The values are stored in the UDC table (54HS/O4).
Occupational Injury/Illness	Defines the exact nature of an occupational illness. The sequence of the illness codes corresponds exactly to the sequence on the OSHA 300 Summary report. If you want to print the OSHA 300 Summary report and send it to the US Department of Labor, do not change the sequence of the codes. The values are stored in the UDC table (54HS/OI).
Occurrence Location	Indicates the exact physical location where the event (injury or illness) occurred, such as the computer room, the loading dock, and so on. The values are stored in the UDC table (54HS/OL).
Incident Role	Indicates the role of the person in the incident. The values are stored in the UDC table (54HS/RL).
Case Status	Indicates the status of the OSHA case for an incident. The values are stored in the UDC table (08/CS).
Injury/Illness Related	Indicates whether a person suffered an illness or injury. The values are stored in the UDC table (08H/IR).
BLS Job Category	Indicates which category best describes the employee's regular type of job or work. These hard-coded values are used for the Bureau of Labor Statistics Survey of Occupational Injuries and Illnesses report. The values are stored in the UDC table (54HS/BJ).

UDC Code	System Usage
BLS Service Length	Indicates the employee's length of service at the establishment when the incident occurred. These hard-coded values are used for the Bureau of Labor Statistics Survey of Occupational Injuries and Illnesses report. The values are stored in the UDC table (54HS/BL).
BLS Work Shift	Indicates when the incident occurred in relation to the employee's work shift. These hard-coded values are used for the Bureau of Labor Statistics Survey of Occupational Injuries and Illnesses report. The values are stored in the UDC table (54HS/BW).

2.4.3 Incident Injury or Illness User-Defined Codes

This table lists the user-defined codes for injuries or illness caused by an incident.

UDC Code	System Usage
Part of Body	Identifies the part of the body injured or affected as a result of the incident. The values are stored in the UDC table (54HS/BP).
Current Status of Injury	Indicates the current status of the illness or injury. The values are stored in the UDC table (54HS/CS).
Event/Exposure	Indicates the manner in which the injury or illness was produced or inflicted by the source of injury or illness. The values are stored in the UDC table (54HS/EV).
Nature of Injury/Illness	Indicates principal physical characteristics of the specific injury or illness. The values are stored in the UDC table (54HS/NI).
Side of Body	Indicates the side of the body where the injury is located. The values are stored in the UDC table (54HS/SB).
Severity of Injury	Indicates the severity of a specific illness or injury. The values are stored in the UDC table (54HS/SI).
Sources of Injury/Illness	Indicates the object, substance, equipment, or other factor responsible for the worker's specific injury or illness or that precipitated the event or exposure. The values are stored in the UDC table (54HS/SR).

2.4.4 Incident Equipment User-Defined Codes

This table lists the user-defined codes for equipment involved in the incidents.

UDC Code	System Usage
Equipment Classification	Indicates the type of action or event related to the incident for the equipment, motor vehicle, or property. The values are stored in the UDC table (54HS/MC).

UDC Code	System Usage
Road/Surface Conditions	Indicates the condition of the road or surface at the time of the incident. The values are stored in the UDC table (54HS/MR).
Visibility Conditions	Indicates the visibility condition of the driver or an operator at the time of the incident. The values are stored in the UDC table (54HS/MV).
Equipment Status	Indicates the status of the equipment as a result of the incident. The values are stored in the UDC table (54HS/QS).
Severity of Equipment Damage	Indicates the severity of the equipment, motor vehicle, or property damage. The values are stored in the UDC table (54HS/SD).
Equipment Year (Release 9.1 Update)	Indicates the year related to the equipment. The values are stored in the UDC table (54HS/YR)

2.4.5 Incident Environment User-Defined Codes

This table lists user-defined codes for incident environment.

UDC Code	System Usage
Environmental Classification	Classifies the type of an environmental impact. The values are stored in the UDC table (54HS/EC).
Environment Status	Indicates the status of a specific environmental impact. The values are stored in the UDC table (54HS/ES).
Product / Substance	Indicates the type of product or substance spilled or released. The values are stored in the UDC table (54HS/PS).
Environmental Severity	Indicates the severity of the environmental impact related to a specific product or substance. The values are stored in the UDC table (54HS/SE).

2.4.6 Employee Type User-Defined Codes (Release 9.1 Update)

A user-defined code (54HS/ET) that indicates the type of employee. The following is the list of the user-defined code that indicates:

"." - Blank

01: Full-Time

02: Part-Time

03: Seasonal

04: Temporary

2.5 Setting Up Category Codes

Category codes are a type of UDC that you customize to better suit the unique requirements of your business.

Category Code	Description
Incident Category Codes	You can use up to 20 category codes in the UDC table (54HS/C1 through C0 and 54HS/11 through 20). Use these category codes to organize additional incident information.
People Category Codes	You can use up to 10 category codes in the UDC table (54HS/P1 through P0). Use these category codes to organize additional information for people related to an incident.
Equipment Category Codes	(Release 9.1 Update) You can use up to ten category codes in the UDC table (54HS/E1 through E0). Use these category codes to organize additional information for equipment that is related to an incident. Equipment category codes 6 through 10 are ten digits in length and display both description 1 and description 2 when you search for equipment that is related to an incident.
Environment Category Codes	You can use up to five category codes in the UDC table (54HS/V1 through V5). Use these category codes to organize additional information for environmental impact and events related to an incident.
Task Category Codes	(Release 9.1 Update) You can use up to 10 category codes in the UDC table (54HS/T1 through T0). Use these category codes to organize additional information for tasks related to an incident. Task category codes 6 through 10 are ten digits in length, and display both description 1 and description 2 when you search for tasks related to an incidents.
Cost Category Codes	You can use up to five category codes in the UDC table (54HS/S1 through S5). Use these category codes to organize additional information for costs related to an incident.
Injury/Illness Category Codes	You can use up to five category codes in the UDC table (54HS/I1 through I5). Use these category codes to organize information for additional injuries or illnesses for a person related to an incident.

2.6 Understanding Safety Hours

Safety hours are the hours that an employee was available to work and has worked, and hence, exposed to occupational risk. It excludes time for vacation, sick or medical leave, or other leave time.

You use safety hours to calculate safety statistics, such as incident frequency rates. You can specify to retrieve safety hours from the Safety Hours table (F54HS20) or from the JD Edwards EnterpriseOne Payroll system tables. If you enter safety hours in the

Safety Hours table, you can enter them by month and year for these fields:

- Establishment

- Company

- Project

- Business Unit

- Contractor

> **See:** Section 3.5, "Entering Safety Hours"

2.7 Setting Up Email Distribution Groups

When you record an incident, the system automatically notifies interested parties. In addition to the originator of the incident, the system uses the default information specified in the processing options of the Incident Master program (P54HS00), an individual email address, as well as an email group address. You can add additional email addresses to the incident so that all interested parties are notified. You can use the information in the Address Book - Who's Who table (F0111) to record the individual email addresses. Use the Email/Internet program (P0111) to set Electronic Address Type equal to *Email* and Message Indicator equal to *1 - primary* for the email address that you want to use for notifications. To add employees to email groups, you need to set up email groups in advance as address book records. You must set up email addresses in the JD Edwards EnterpriseOne Address Book system. If the email address is not set up for the address book record, the system sends a message to the work center for notifications. You create a search type such as DL for your distribution lists.

You can set up email distribution groups using the Distribution Group Revisions program (P02150), which is available on the Health and Safety Setup menu. You need to first create an address book record for the distribution group before adding employees to the group using this application. You need to create a structure type in the UDC table 01/TS to identify the distribution groups. You can use the value of EML for the distribution list structure type. After you create the distribution group, you can then add members to the group.

2.7.1 Forms Used to Set up Email Distribution Groups

Form Name	Form ID	Navigation	Usage
Work With Distribution Lists	W021508A	Health & Safety Incident Setup (G54HS41), Distribution Group Revisions (P02150)	Access the Work With Distribution Lists form to add an email distribution group.
Address Parent/Child Revisions	W0150A	On the Work with Distribution Lists form, click Add.	Add a new email distribution group. Add a person ID to the distribution group.

2.8 Setting Up Composite Application Framework

If you want to display a map showing the incident location using either the address fields or the Latitude/Longitude fields, you can use the Composite Application

Framework feature. To configure the Composite Application Framework feature to use with JD Edwards EnterpriseOne Health and Safety Incident Management system, follow these steps:

1. Add mapping URL to the MO Queue program (P98MOQUE), (Type 10).

2. Create a publication list in the Publication List program (P952336).

3. Add users to the publication list.

4. Add the Incident Master program to the Related Information Application Framework (RIAF) program (P952332).

5. Add map tabs in CafeOne for both street address and Latitude/Longitude from the Incident Master program.

> **See:** *JD Edwards EnterpriseOne Tools Composite Application Framework User's Guide*

2.9 Understanding Next Numbers

The JD Edwards EnterpriseOne Health and Safety Incident Management system uses a standard next number for Incident Number. You need to set the starting incident number prior to using the system. Use the Work With Next Number program (P0002 or enter NN in the Fast Path field) to set up the incident number for system 54HS - Health and Safety Incident Management. You should not select the Check Digit Used option.

Next numbers is an automatic numbering utility. The Next Numbers program assigns numbers to documents using one or both of these:

- Standard next numbers.

  The system finds the next available number in the Next Numbers - Automatic table (F0002) and assigns that number to the document.

- Next numbers by company and fiscal year.

  The system finds the next available number by company and fiscal year or by company only in the Next Numbers by Company/Fiscal Year - Automatic table (F00021).

Next numbers work in conjunction with the data dictionary. Each data dictionary item that uses next numbers contains a next-numbering index value that corresponds to the line number that contains the next number value for that data item.

> **See:** "Setting Up Next Numbers" in the *JD Edwards EnterpriseOne Financial Management Fundamentals Implementation Guide*

2.10 Understanding Failure Analysis

Failure Analysis is a database in JD Edwards EnterpriseOne that allows you to associate failures, analyses, and resolutions with work orders, cases, or health and safety incidents. You need to set up failure analysis codes if you use codes to define a unit of failure. The codes are the building blocks of the Failure Analysis tree, but it is not required to set up trees to use failure analysis codes. You can use these codes with failures, analyses, and resolutions.

> **See:** "Setting Up Failure Analysis Code" in the *JD Edwards EnterpriseOne Applications Capital Asset Management Implementation Guide*

Set up your failure analysis codes so that they can be used in the Failure Analysis Search and Select grid on the Investigation subform in the Incident Details tab in the Incident Master program. Oracle recommends that you categorize the health and safety failure codes using one of the Failure Analysis category codes. Configure the Failure Analysis Search and Select grid with a custom grid to see the category code when the search and select appears. If you are also using Failure Analysis for Capital Asset Management, you need to distinguish your health and safety failure codes from the maintenance failure codes. Categorizing your codes enable you to search failure codes by using the Query By Example (QBE) with a custom grid to quickly find the appropriate health and safety failure code.

2.11 Understanding Establishments

Establishments are OSHA's name for an organization that is involved in the same work activity, therefore exposed to the same risk. An organization may have several establishments. OSHA requires reporting on each establishment separately. You must report OSHA information for each establishment in the organization that meets OSHA reporting criteria. An establishment for OSHA reporting purposes is defined as a single physical location where like business is conducted or where services or industrial operations are performed. To do this reporting, you must both set up and identify each employee who works in an OSHA reportable establishment. You identify the establishment in which an employee works by using supplemental data.

To set up establishments, follow these steps:

1. You set up values in the Establishment Search Types UDC table (08H/ES UDC) to define establishments in the JD Edwards EnterpriseOne system. This is located on the Health and Safety Incident Setup menu G54HS41. If you create a new search type, for example, **EST** for Establishment, you will need to add it to the Address Book Search Type UDC table (01/ST). The system will validate the establishment search type when an establishment is entered for an incident.

2. Add the establishments to the address book with the defined search type.

3. You can use the JD Edwards EnterpriseOne Payroll system to determine the safety hours and average annual number of employees. You must first associate each employee with the OSHA reportable establishment using the Employee Supplemental Data program (P00092). To create the association:

    1. In the Work With Supplemental Data form, enter the employee number in the Employee Address Book Number field and click the Find button.

    2. Select the Data Type **EN** in the grid and click the Select button.

    3. In the General Description Entry form, enter the establishment number in the **Est. No**. field.

    > **Note:** You do not need this step if you are using the Safety Hours Entry program (P54HS20) for safety hours and average annual number of employees.

4. Use the Establishment Condition program (P086011) from the Health & Safety Incident Setup menu to enter a condition record for each establishment for each calendar year being reported. The JD Edwards EnterpriseOne Health and Safety Incident Management system uses establishment information for OSHA and Bureau of Labor Statistics reporting. To produce the OSHA and BLS reports you need a condition record for each establishment and year combination, even if

nothing unusual happened that year.

(Release 9.1 update) You can associate a company with the establishment in the P086011 program. This association of company and establishment can be leveraged in the Incident Master program (P54HS00) to default in the company based on the establishment using this relationship. Use the P086011 program to record a change reason if you are re-submitting the electronic version of the 300A to OSHA. The program will use the most recent change reason recorded.

Use the Establishment Condition program (P086011) to enter the following additional information about an establishment:

- **Maximum Size**

  Enter a code that represents the maximum number of employees that have worked at an establishment at any point in the reporting year.

- **Form Exit Establishment Information**

  Use this form exit to associate a company with an establishment and to define the establishment type. This information is used when submitting an electronic file to OSHA for the 300A report.

- **Row Exit Change Reason**

  Use this row exit to record a reason why you are re-submitting an electronic file to OSHA. If there is more than one change reason given for the same establishment/year/report type combination, the re-submitted electronic file will use the one with the highest sequence number.

3

Entering and Managing Incidents

This chapter contains the following topics:

3.1 Understanding Incident Management

The JD Edwards EnterpriseOne Health and Safety Incident Management system provides an integrated solution to manage incidents. The Health and Safety Incident Management system enables you to:

- Gather information related to health or safety job-related incidents. You can add, edit, delete, and view incidents.

- Relate the incident to other information that already exists within JD Edwards EnterpriseOne, such as personnel, equipment or assets, related employee establishment, projects, employee competencies, and personnel safety hours.

- Send notifications related to incidents such as, alerts sent by email or sent to the work center.

- Complete and produce OSHA 300 Log Report, OSHA 301 Injury/Illness Report, OSHA 300A Summary of Work-Related Injuries and Illnesses, and Bureau of Labor Statistics Survey of Occupational Injuries and Illnesses Form (Form BLS-9300 N06).

- Provide a detailed incident report.

- Analyze health and safety incidents using One View Reporting.

A health and safety incident is a single occupational event resulting in one or more of the following events:

- Illness or injury to a person or people.

- Days away from work or job transfer as a result of injury or illness.

- Security issue such as theft or assault.

- Motor vehicle damage.

- Property or asset damage.

- Environmental impact, such as a spill.

- Other types of events such as fire or explosion, near misses, or observed unsafe conditions or acts.

3.2 Entering and Updating Incidents Using the Incident Master Program (P54HS00)

This section provides an overview of incident records and discusses how to:

- Set up processing options for the Incident Master program (P54HS00).

- Enter and update incidents using the Incident Master program (P54HS00).

3.2.1 Understanding Incident Records

The Incident Master program provides detailed information of an incident such as:

- People involved in the incidents.

- Third-party contractor responsible in an incident.

- Property damage.

- Equipment involved in the incident.

- Environmental impact.

When you record an incident using the Incident Master program, you can classify its attributes by selecting the Potential Incident, Exclude From Safety Statistics, Property / Equipment Damage, Motor Vehicle Involved, Environmental Impact, Injury / Illness, Security, and Other options. (Release 9.1 Update) You can also categorize the incident record by using the Record Type field, which is useful when you analyze different types of incidents. After the incident record is categorized, you can filter and search for incidents to include only the incidents marked with specific attributes.

Figure 3–1   Manage Incidents

You can search for health and safety incidents by:

Incident
Use the Incident tab on the Incident Master program to locate incidents. You can search incidents using dates, severity, status, or incident attributes.

The system provides you an option to easily print a detailed report of an incident from the Manage Incidents form. To print a report for an incident, select the Print Report

button for the incident row. The system prints the report for the incident, and automatically selects the incident in the grid row (Release 9.1 Update).

People
Use the People tab to locate incidents based on the people involved. You can also search for incidents based on employee, incident role, and whether the person is injured.

Equipment
Use the Equipment tab to locate incidents based on the property or equipment involved. You can also search for incidents based on third-party equipment and motor vehicle.

3.2.2 Forms Used to Enter Incidents

Form Name	Form ID	Navigation	Usage
Manage Incidents	W54HS00A	Daily Processing (G54HS10), Incident Master (P54HS00)	Search for existing incidents.
Add Incident	W54HS00B	Click Add on the Manage Incidents form.	Add, edit, or delete an incident when the initial details of an incident are recognized as an incident and is investigated.

3.2.3 Setting Processing Options for the Incident Master Program (P54HS00)

Processing options enable you to specify the default processing for programs and reports.

3.2.3.1 Defaults

1. Establishment
Use this processing option to specify whether the system uses a default value for the establishment when you add incident. The system uses this processing option for both the Incident Entry program (P54HS00) and Report an Incident program (P54HS30). Enter a valid address book number for an establishment.

2. Default Establishment Based on Logged in User (Release 9.1 Update)
Use this processing option to set the default value for the current establishment that is associated with the logged-in user from the Employee Supplemental Data. This processing option takes precedence over processing option 1 (Establishment). If no establishment is set up for the logged-in user, the system uses the default value provided in processing option 1. Values are:

Blank: Do not set the default establishment based on the logged-in user.

1: Set the default establishment based on the logged-in users' Employee Supplemental Data setup.

3. Distribution List Address Number for Incident Notifications
Use this processing option to use the incident notification list for the distribution list when you add an incident. Enter a valid address book number for the distribution list.

4.Organization Structure Type for Distribution List
Use this processing option to indicate whether the system uses a default value for the organization structure type when you enter an incident. Enter a value from the Search Type UDC table (01/ST) that is associated with the distribution list on the incident notification list. If you use a distribution list to send notifications, you must enter the organization structure type. You use this processing option for both the Incident Master program (P54HS00) and the Report an Incident program (P54HS30).

5. Individual Address Number for Incident Notifications
Use this processing option to indicate whether the system uses a default individual address number in the incident notification list for a new incident. Enter a valid address book number for the individual. You use this processing option for both Incident Entry program (P54HS00) and Report an Incident program (P54HS30).

6. Incident Record Type (Release 9.1 Update)
Use this processing option to specify whether the system uses a default value for the incident record type when you add a new incident. Enter a value from the 54HS/RT UDC table for the incident record type. You use this processing option for both the Incident Entry program (P54HS00) and the Speed Incident Entry program (P54HS30).

7. Default Job Title when Job Title is Blank in Employee Master (Release 9.1 Update)
Use this processing option to indicate how the system uses the values in the employee master when the job title is blank in employee master. Values are:

Blank: Do not default Job Title.

1: Default Job Title to Job Type/Job Step description.

2: Default Job Title to Position ID description.

8. Default Company (Release 9.1 Update)
Use this processing option to define the default company the system uses for new incidents. If no company is set up for a particular establishment using the P086411 program, the system uses the company associated with the logged-in user. Values are:

Blank: The default company is based on the logged-in user.

1: The default company is based on the establishment's associated company.

3.2.3.2 Classifications (Release 9.1 Update)

1. Default Potential Incident
Use this processing option to specify whether the system defaults the potential incident classification to selected or not selected when you add a new incident. This processing option is used for both the Incident Entry program (P54HS00) and the Speed Incident Entry program (P54HS30). Values are:

Blank = Not Selected

1 = Selected

2. Default Property/Equipment Damage
Use this processing option to specify whether the system defaults the property/equipment damage classification to selected or not selected when you add a new incident. This processing option is used for both the Incident Entry program (P54HS00) and the Speed Incident Entry program (P54HS30). Values are:

Blank = Not Selected

1 = Selected

3. Default Injury / Illness

Use this processing option to specify whether the system defaults the injury/illness classification to selected or not selected when you add a new incident. This processing option is used for both the Incident Entry program (P54HS00) and the Speed Incident Entry program (P54HS30). Values are:

Blank = Not Selected

1 = Selected

4. Default Exclude From Safety Statistics

Use this processing option to specify whether the system defaults the exclude from safety statistics classification to selected or not selected when you add a new incident. This processing option is used for both the Incident Entry program (P54HS00) and the Speed Incident Entry program (P54HS30). Values are:

Blank = Not Selected

1 = Selected

5. Default Motor Vehicle Involved

Use this processing option to specify whether the system defaults the motor vehicle involved classification to selected or not selected when you add a new incident. This processing option is used for both the Incident Entry program (P54HS00) and the Speed Incident Entry program (P54HS30). Values are:

Blank = Not Selected

1 = Selected

6. Default Authorities Alerted

Use this processing option to specify whether the system defaults the authorities alerted classification to selected or not selected when you add a new incident. This processing option is used for both the Incident Entry program (P54HS00) and the Speed Incident Entry program (P54HS30). Values are:

Blank = Not Selected

1 = Selected

7. Default Environmental Impact

Use this processing option to specify whether the system defaults the environmental impact classification to selected or not selected when you add a new incident. This processing option is used for both the Incident Entry program (P54HS00) and the Speed Incident Entry program (P54HS30). Values are:

Blank = Not Selected

1 = Selected

8. Default Security

Use this processing option to specify whether the system defaults the security classification to selected or not selected when you add a new incident. This processing option is used for both the Incident Entry program (P54HS00) and the Speed Incident Entry program (P54HS30). Values are:

Blank = Not Selected

1 = Selected

9. Default Security Value

Use this processing option to specify whether the system uses a default value for the security classification when you add a new incident. Enter a value from the 54HS/SC UDC table for the security classification. This processing option is used for both the Incident Entry program (P54HS00) and the Speed Incident Entry program (P54HS30).

> **Note:** This processing option is used only if the Default Security processing option is selected.

10. Filter Security by Special Handling Code

Use this processing option to specify a special handling code defined in the Security Classification user defined code (54HS/SC). If a special handling code is specified, only those user defined codes that are identified with this value in the special handling code are displayed in the drop-down list. The blank code is also listed in the drop-down list regardless of the special handling code. This processing option is used for both the Incident Entry program (P54HS00) and the Speed Incident Entry program (P54HS30).

11. Default Other

Use this processing option to specify whether the system defaults the other classification to selected or not selected when you add a new incident. This processing option is used for both the Incident Entry program (P54HS00) and the Speed Incident Entry program (P54HS30). Values are:

Blank = Not Selected

1 = Selected

12. Default Other Value

Use this processing option to specify whether the system uses a default value for the other classification when you add a new incident. Enter a value from the 54HS/OC UDC table for the other classification. This processing option is used for both the Incident Entry program (P54HS00) and the Speed Incident Entry program (P54HS30).

> **Note:** This processing option is used only if the Default Other processing option is selected.

13. Filter Other by Special Handling Code

Use this processing option to specify a special handling code defined in the Other Classification user defined code (54HS/OC). If a special handling code is specified, only those user defined codes that are identified with this value in the special handling code are displayed in the drop-down list. The blank code is also listed in the drop-down list regardless of the special handling code. This processing option is used for both the Incident Entry program (P54HS00) and the Speed Incident Entry program (P54HS30).

3.2.3.3 Process

1. Send Notification on Incident Creation

Use this processing option to automatically send a notification to all members in the incident notification list when you add an incident. Values are:

Blank: Do not send notification

1: Send notification

2. Conditional Locking of Edits to the Incident and Tasks

Use this processing option for conditional locking of the incident according to the special handling codes of X and A when they are set up in the Special Handling Code column for the incident status (UDC 54HS/ST). When an incident has a status where the special handling code is set to X, the user will not be able to edit the incident and associated tasks when this processing option is set to 1. When an incident has a status where the special handling code is set to A, the user will not be able to edit the incident, but they will be able to continue to edit the associated tasks when this processing option is set to 1. Values are:

Blank: Conditional locking is not enabled.

1: Conditional locking is enabled.

3. Delete Incident data from Change History Tables

Use this processing option to specify whether the associated incident data from the change history tables should also be deleted when an incident is deleted. Values are:

Blank: Do not delete the associated incident data from the change history tables when an incident is deleted.

1: Delete the associated incident data from the change history tables when an incident is deleted.

4. Lock Incident Number During 'ADD' using P54HS00 (Release 9.1 Update)

Use this processing option to lock the Incident Number field from being edited when you add a new incident using the Incident Master program (P54HS00). This processing option does not apply when you add an incident by using the Speed Incident Entry program (P54HS30). Values are:

Blank: Locking is not enabled.

1: Locking is enabled.

5. Advance Incident Status When All Tasks Are Complete (Release 9.1 Update)

Use this processing option to indicate whether the system automatically advances the incident status when all tasks have been completed. The system will use the value entered for the Task Completed Status to determine if all tasks are at that status. The system will also use the Designated Incident Status to determine which value to set for the incident status if this processing option is set to automatically advance the incident status. Values are:

Blank: Do not automatically advance the incident status.

1: Automatically advance the incident status when all tasks are complete.

6. Require At Least One Incident Classification (Release 9.1 Update)

Use this processing option to specify whether the system requires at least one of these eight Incident Classification check boxes to be selected when you create a new incident: 1) Authorities Alerted, 2) Potential Incident, 3) Property/Equipment Damage, 4) Motor Vehicle Involved, 5) Environmental Impact, 6) Injury/Illness, 7) Security, 8) Other. The "Exclude From Safety Statistics" check box is not included in this requirement. If the processing option is set to require at least one incident classification, the user must select one or more to be able to add the new incident. The system uses this processing option for both the Incident Entry (P54HS00) and Speed Incident Entry (P54HS30) programs. Values are:

Blank: No Incident Classifications are required when creating a new incident.

1: At least one Incident Classification is required when creating a new incident.

3.2.3.4 Task Reminders (Release 9.1 Update)

1. Allow Task Reminder
Use this processing option to specify whether the system allows you to send task reminder notifications. Values are:

Blank: Do not allow task reminders.

1: Allow task reminders.

2. Notify Task Assigned To Address
Use this processing option to specify whether the Task Assigned To Address is sent a reminder for the selected incident task. Values are:

Blank: Do not notify the Assigned To Address.

1: Notify the Assigned To Address by sending the task reminder.

3. Notify Incident Originator Address
Use this processing option to specify whether the Incident Originator Address is sent a reminder for the selected incident task. Values are:

Blank: Do not notify the Incident Originator Address.

1: Notify the Incident Originator Address by sending the task reminder.

4. Notify Incident Reported By Address
Use this processing option to specify whether the Incident Reported By Address is sent a reminder for the selected incident task. Values are:

Blank: Do not notify the Incident Reported By Address.

1: Notify the Incident Reported By Address by sending the task reminder.

5. Notify Incident Investigated By Address
Use this processing option to specify whether the Incident Investigated By Address is sent a reminder for the selected incident task. Values are:

Blank: Do not notify the Incident Investigated By Address.

1: Notify the Incident Investigated By Address by sending the task reminder.

6. Notify Incident Handler Address
Use this processing option to specify whether the Incident Handler Address is sent a reminder for the selected incident task. Values are:

Blank: Do not notify the Incident Handler Address.

1: Notify the Incident Handler Address by sending the task reminder.

7. Notify Task Assigned To Supervisor Address
Use this processing option to specify whether the Task Assigned To Supervisor Address is sent a reminder for the selected incident task. Values are:

Blank: Do not notify the Task Assigned To Supervisor.

1: Notify the Task Assigned To Supervisor Address by sending the task reminder.

3.2.3.5 Display

1. Display or Hide Change History Information
Use this processing option to determine whether the system displays the change history information related to an incident. Values are:

Blank: Hide change history information.

1: Display change history information.

> **Note:** When you add a new incident, the system does not display the Change History tab.

2. Display or Hide HR Competencies
Use this processing option to specify whether the system displays the HR competency information related to the people associated with an incident. Values are:

Blank: Hide HR competencies.

1: Display HR competencies.

> **Note:** When you add a new incident, the system does not display the HR Competencies tab.

3. Display or Hide Equipment Licenses
Use this processing option to determine whether the system displays the license information related to the equipment associated with an incident. Values are:

Blank: Hide equipment licenses.

1: Display equipment licenses.

> **Note:** When you add a new incident, the system displays the Licenses tab.

4. Privacy Case
Use this processing option to determine whether the system should respect the privacy case or not, for this application. If the Privacy processing option is ON and the privacy case is checked for an individual, then personal details like Person ID, Name, and Injury description will be masked, and the fields will be disabled accordingly. Values are:

Blank: Privacy OFF

1: Privacy ON

5. Who's Who Search/Select
Use this processing option to determine whether the Who's Who Search and Select form appears when you enter an agency address book number. If this processing option is set to display the form, when you move out of the address book ID field the form will pop-up and allow you to easily select the contact information for this agency from the Who's Who contact information. Values are:

Blank: Do not display the Who's Who Search and Select form.

1: Display the Who's Who Search and Select form.

> **Note:** The version of the Who's Who Search and Select form is set up under the Versions tab of the processing options.

6. Calculate YTD Incidents (Release 9.1 Update)

Use this processing option to specify how the system filters the incident year to date calculation. Incidents marked as potential or excluded from safety statistics are automatically excluded from the count. If this processing option is set to filter by either company or establishment, the value for company or establishment initially shown on the incident is used for the filter. This processing option is used only in the Incident Entry program (P54HS00). Values are:

Blank = Include all incidents.

1 = Include incidents within company only.

2 = Include incidents within establishment only.

3.2.3.6 Versions

1. Quick Customer/Contact Add (P01015) Version

Use this processing option to define the version of the Quick Customer/Contact Add program (P01015) that the system uses to add a contact. When you choose to display the Who'S Who Search and Select for the Agency number, you can select a contact from this form. If you leave this processing option blank, the system will not display the form. Values are:

Blank = ZJDE0001

3.2.4 Entering and Updating Incidents Using the Incident Master Program (P54HS00)

Access the Add Incident form.

Figure 3–2 Add Incident

The header contains these fields that you can use to record the core details of an incident:

Incident Number

The system can assign an incident number from the Incident Number Next Number, but you can also enter a value. This is a mandatory field.

Incident Date / Time (Release 9.1 Update)

This is a mandatory field. The system uses the current date and time as the default value in the Incident Date/Time field. Enter 1:00 through 9:00 with leading zeros (01:00 or 09:00) if you want to enter minutes. The value in this field cannot be later than the value in the Date Reported / Time field.

Date Reported / Time (Release 9.1 Update)

This is a mandatory field. The system uses the current date and time as the default value in the Date Reported/Time field. Enter 1:00 through 9:00 with leading zeros (01:00 or 09:00) if you want to enter minutes. The value in this field cannot be earlier than the value in the Incident Date / Time field.

Incident Description

Enter a brief description of the incident.

Record Type (Release 9.1 Update)

Enter a value from the Record Type UDC table (54HS/RT) to indicate the type of incident record.

Incident Severity

Enter a value from the Severity Value UDC table (54HS/SV) to indicate the severity of the incident.

Incident Status

Enter a value from the Incident Status UDC table (54HS/ST) to indicate the current status of the incident.

Incidents YTD

The system populates this field with the number of incidents that have occurred year to date. This does not include any incidents marked as either potential incidents or those with the Exclude From Safety Statistics option selected.

The header also contains these options that you can use to classify an incident:

Potential Incident

Select this option if you are recording a near miss, observed unsafe act or condition, a safety inspection, or anything else that is not an actual health and safety incident.

Exclude From Safety Statistics

Select this option if you want to exclude the incident from any safety statistics (One View Reporting) or the counts shown in the Safety Scoreboard and Incidents Year to Date.

Authorities Alerted

Select this option to indicate that the authorities were alerted about the incident.

Property / Equipment Damage

Select this option to indicate the incident has related property or equipment damage.

Motor Vehicle Involved

Select this option to indicate a motor vehicle was involved in the incident.

Environmental Impact

Select this option to indicate the incident had an impact on the environment such as a spill or release.

Injury / Illness

Select this option to indicate the incident has people who were injured or were ill.

Security

Select this option to indicate the incident has a security issue such as a threat or assault. When you select this option, a list of options from the Security Classification UDC table (54HS/SC) appears next to it. You can use this list of options to categorize the security type.

Other

Select this option to indicate whether the incident has other attributes, such as a fire, explosion, or perhaps is being used to indicate a safety inspection. When you select this option, a list of options from the Other Classification UDC table (54HS/OC) appears next to it. You can use this list of options to categorize the other type.

You can access Attachments from the Form menu to attach a media object such as an image or a document related to the incident.

3.2.4.1 Details

In the Add Incident or Edit Incident forms, select the Details tab.

Figure 3–3 Details

The Details form contains these collapsible subforms:

Location or Organization

You enter information about the location of the incident and the organization associated with the incident. You can set a processing option to let the system populate the value in the establishment field by default. The street address of the incident will default from the mailing address of the address book record for the establishment entered on the incident. You can also show a map of where the incident took place. You use the Composite Application Framework field to show a map of where the incident took place using the street address or the latitude or longitude coordinates for the incident. The business unit can also default in, based on the employee profile setup program (P20103) of the logged-in user, and the relationship of the business unit to a company as set up in the Business Unit Master. If no employee profile is set up for the user, the system will use the business unit on the address book record of the logged-in user.

Notifications

You enter and maintain information about emails sent or email addresses associated with the incident. You can also send emails or messages to individuals or groups. There are two tabs on this subform, Notifications List and Sent History. The Notifications List form is like an address book for the specific incident, containing a list of individuals or distribution lists that are to be notified. When you add an incident in the system, the system adds the originator of the incident, the distribution list, and the individual specified in the processing options to the Notifications List form. You can add additional members to the list. Notifications are sent out automatically when an incident is added. Select the rows to re-notify and use the Send Notification button if you want to re-notify the members in the Notifications List. To remove a member from the list, select the row for the member and use the Delete button. The Sent History form records each time a notification is sent, and the member to whom the notification is sent.

Responsibility

You enter information about who is responsible for the incident, drug and alcohol testing, insurance claim information, and causal factors and other risk information on this subform. The Contractor / 3rd Party Involved option and the Contractor / 3rd Party fields are used extensively in the One View Reporting and Safety Hours programs.

Environmental Impact

You enter information about products or substances that are spilled or released, the impact to the environment, and the remediation and corrective measures. There are many fields on this sub-form that you can use to meet the special needs for an organization, such as five category codes and four pairs of quantity and associated unit of measure fields. An incident can have any number of environmental impact records, one record for each product or substance spilled or released. For example, an incident can involve several substances that are spilled. You enter a record in the grid for each substance spilled, so the incident can have multiple environmental impact records.

Agencies

You enter information about the organizations or agencies involved, such as law enforcement, EPA, DOT, insurance companies, and so on. If the Who's Who Search and Select processing options are set up, the contact information for an agency can be selected from Who's Who. The system displays the contact form when you enter the agency number.

Category Codes

You use Incident Category Codes to categorize and associate the incident with up to 20 user-defined category codes. The five user-reserved fields, common to most JD Edwards EnterpriseOne tables, are located on this subform directly below the category codes, though they remain hidden. To use them in this form, your System Administrator must enable them in the Form Design Aid program. However, they are already incorporated into the processing logic of the incident.

Investigation

You enter information about who is investigating, who is handling the investigation, and what has been determined in the Investigation subform. The system uses the user ID of the person entering the incident as the default value for the originator. You use the Failure Analysis feature to associate failures, analyses, or resolutions with incidents. There are four additional media objects on this subform for additional information about the incident.

Costs

You can enter any estimated or actual costs related to this incident. You can associate an incident with a work order and display the estimated and actual work order costs. The system displays the total of the estimated and actual costs that you enter in the grid. The work order costs are displayed for the user's convenience but are not automatically entered into the grid. You enter them as grid rows if you want these costs included in the total incident costs. There are five category codes for your use to further describe costs. The value in the Currency Code field comes from the company of the incident. The currency code is required when you enter more than one cost record.

Activities

You can create tasks and keep track of them, along with corrective measures. Tasks can be assigned to individuals and tracked in terms of status, priority, and dates. The system notifies the individuals through emails when a task is assigned. There are 10

category codes for Tasks for your use. The Corrective Measures tab provides a media object for the incident. If you update the person assigned to the task or the task status fields, the system re-notifies automatically.

(Release 9.1 Update) There are four date fields available for activities: Task Beginning Date, Task Ending Date, Task Estimated Completion Date, and Task Actual Completed Date. The values in these fields cannot be earlier than the values in Incident Date/Time fields.

(Release 9.1 Update) When you set the processing option to allow task reminders, the system displays the Send Reminder button above the task grid. Select the tasks for which you want to receive reminders using the row select, and click the Send Reminder button. Based on the processing options that are set up, the system sends an email or Work Center message to the people associated with the task, the incident associated with the task, or the task's assignee. The email message will contain a link to the incident for the recipient to use.

3.2.4.2 People

In the Add Incident or Edit Incident forms, select the People tab.

You use the fields in the People tab to enter information of a person or people involved with this incident, their role, injuries and regulatory (OSHA) illness or injury information. (Release 9.1 Update) If you enter a person by selecting them from the Address Book certain fields can default in for that person.

Figure 3–4 People

The People form contains these collapsible subforms:

People
You identify all people associated with the incident using the People subform. When you click the Contact Information button, the system displays emergency contact information for the grid row selected. You can add information about a person directly in the grid or after entering their name, you can use the People Details button to complete entering the details for that person. You can enter information for any person, even if that person is not an employee. If the person has an address book record, you can enter a valid address book number. If the person does not have an address book record, you can skip this field and enter the name of the person. After you enter the address book number, indicate the role the person had in the incident. If

you enter a person by selecting them from the Address Book certain fields can default in for that person.

The People Details form organizes the information into convenient sections to facilitate data entry. The options at the top of this form are important for One View Reporting. You use these options to indicate if individuals are employees or not, and if they are injured or ill. The people detail sections are:

■ Job Related: The system can populate some of the fields in this section using default values from the employee record. If you add or edit information in this section it will not update the employee master. It will be stored in the people record for the incident.

■ Personal / Contact: Use the fields in this section to record additional personal information.

■ Risk: Use the fields in this section to record worker compensation or other insurance information along with drug and alcohol testing information.

■ Reported Injury: Use the fields in this section to describe the primary or most severe injury or illness for the person. If you flag the injury or illness as OSHA Recordable, the incident will be included for regulatory reporting.

■ Case Information: You must enter a case and report on the case if an employee is injured or ill on the job. Select the Recordable option to let the system assign a case number. The system assigns case numbers sequentially starting over each calendar year. It does not take into account any other field such as establishment. Select the Privacy Case option, if a person wants to remain anonymous on reports and in the Case Inquiry program. This will replace the name with **Privacy Case**, the Person ID with **99999999** and display the Privacy Case Alternate Description. Complete this section to record the information necessary for the OSHA and BLS reporting. There is a processing option to control whether privacy case is recognized for the Incident Master program.

■ Category Codes: There are ten category codes to further describe and categorize the person related to the incident.

You can use the People Details button to access all the people fields on one form. After you add or update information in the People Details form, click the Save button on that form to save the changes. You must also click the Save button on the Add or Edit Incident form to save the changes made to the incident.

Injury or Illness Details
You enter additional illness or injury details into a separate grid. A person could have many injury detail records and could have a complex injury. The Injury/Illness section enables you to capture information in detail about the injury. When you add a person to an incident, you can use the Additional Injury/Illness Details button to enter any additional injuries or illnesses for that person related to the incident. You record the most severe, or primary injury or illness on the People Details form, and enter only additional injuries and illnesses on the Injury/Illness Details subform. The Injury/Illness Details subform also provides a Privacy Case Alternate Description field for each additional injury. There are five additional category codes for these injuries and illnesses. The system stores information for additional injuries and illnesses in the Incident Injury / Illness Details table (F54HS021). This subform has a Delete button that you can use to delete records in the form. If you delete the person record from the incident, any additional injuries or illness records related to that person for the incident are deleted.

Competencies

You can set processing options to display the HR Competencies for the employees related to the incident.

3.2.4.3 Equipment

In the Add Incident or Edit Incident forms, select the Equipment tab.

You use the fields in the Equipment tab to enter information about equipment or property, including motor vehicles that are involved in this incident. You can also view equipment permits and licenses information.

Figure 3–5 Equipment

The Equipment form contains these collapsible subforms:

Equipment

Use this subform to record any equipment, property, or motor vehicle involved in the incident.

You can enter equipment information directly into the grid or use the Equipment Details form that you access by clicking on the Equipment Details button.

The options at the top of the Equipment Details form are important for One View Reporting. You need to select these options to indicate if the equipment is damaged, if it is a motor vehicle, or if it belongs to a third-party. If the Third-Party Equipment option is not selected, the system assumes that the equipment is company owned. The fields in this form are arranged in these sections:

- Incident: Use this section to describe incident conditions and to provide more information about equipment damage.

- Operator: Use this section to record information about the driver or operator.

- Equipment: Use this section to record additional information about the equipment.

- Risk: Use this section to record risk related to the equipment.

- Category Codes: Use the five category codes in this section to further describe the equipment or damage related to the incident.

After you add or update information in the Equipment Details form, click the Save button on that form to save the changes. You must also click the Save button on the Add or Edit Incident form to save the changes made to the incident.

Equipment Licenses

If you are using the Permits and Licenses program (P1206) of the Capital Asset Management system, licenses can be displayed for any equipment related to the incident. You must set a processing option to display the Equipment Licenses subform.

(Release 9.1 Update) When you select equipment from the Equipment Master, the VIN #, Equipment Make, and Equipment Model will default in. You can also simply enter the description for equipment and not use the equipment number field.

3.2.4.4 Change History

In the Add Incident or Edit Incident form, select the Change History tab.

You can view information about changes made to any of the fields on the records related to the incident using the Change History tab. You need to set processing options to display the Change History tab. The system creates a change history record for every add, update, or delete action performed for any field on the Health and Safety Incident Management tables. You can also view information for the date of the change and who made the change. A processing option controls whether these audit tables are also deleted when an incident is deleted. The system deletes all associated records from additional tables, such as tables related to people and costs; all associated media objects; and change history tables (audit tables will be deleted based on the processing option).

Figure 3–6   Change History

The Change History tab provides the history for the following tables:

- Incident Change History (F54HS01M)
- People Change History (F54HS02M)
- Injury / Illness Change History (F54HS02N)
- Equipment Change History (F54HS03M)
- Agencies Change History (F54HS04M)
- Tasks Change History (F54HS06M)
- Costs Change History (F54HS07M)
- Environmental Impact Change History (F54HS08M)

Because the Change History tab does not provide a Find button, press the Enter key after you complete the Query by Example (QBE) fields that you use to filter records.

You can delete the Change History records using the Incident Management Purge program (R54HS410) when the incident is deleted.

3.3 Entering Incidents Using the Report an Incident Program (P54HS30)

This section provides an overview of how to enter incidents using the Report an Incident program (P54HS30), lists the form used to enter incidents using the Report an Incident program, and discusses how to set processing options for the Report an Incident program.

3.3.1 Understanding How to Enter Incidents Using the Report an Incident Program (P54HS30)

The Report an Incident program is a simplified program. Any employee can use this program to quickly enter the initial details of an incident such as what, when, who, and where. When an employee enters an incident using this program, the system uses the processing option settings to select a version of the Incident Master program (P54HS00) to determine whether to send notifications automatically and to use default values for the establishment, individual to notify, and distribution list to notify. It will also be used to determine the incident record type. Although this application is a standard JD Edwards EnterpriseOne application, this program is designed to fit when being used on a tablet device. The information presented requires no scrolling.

Figure 3–7   Report an Incident

> **See:** Section 3.2, "Entering and Updating Incidents Using the Incident Master Program (P54HS00)"

3.3.2 Form Used to Report Incidents Using the Report an Incident Program (P54HS30)

Form Name	Form ID	Navigation	Usage
Report an Incident	W54HS30C	Daily Processing (G54HS10), Report an Incident (P54HS30)	Report an Incident. An employee can use this program to quickly enter the initial details of an incident.

3.3.3 Setting Processing Options for the Report an Incident Program (P54HS30)

Processing options enable you to specify the default processing for programs and reports.

3.3.3.1 Process

1.Version of Incident Master P54HS00 to use for Processing Options

You use this processing option to define the version of the Incident Master program (P54HS00) to use. The Report an Incident program uses this version's processing option to send notifications and the default value for establishment when entering a new incident. If you leave this option blank, the system uses the default version ZJDE0001.

> **Note:** Incidents can also be entered using the mobile applications. Refer to the *JD Edwards EnterpriseOne Applications Mobile Enterprise Applications Implementation Guide* for specific information about the mobile applications.

3.4 Inquiring on Cases

This section provides an overview of the Incident Case Inquiry program (P54HS210), lists the form used to inquire on incidents, and discusses how to set processing options for the Incident Case Inquiry program.

3.4.1 Understanding the Incident Case Inquiry Program (P54HS210)

Incident Case Inquiry program (P54HS210) is a special program that provides a limited view for only the occupational injury and illness information for employees involved in incidents. Incident Case Inquiry program provides inquiry access to all of the fields in the OSHA 300 - Log of Work-Related Injuries and Illnesses form and the information from the *Tell us about the case* section on the OSHA 301 - Injuries and Illnesses Incident Report. You can use privacy case filters to protect the identity and intimate details of an injury/illness of an employee marked as Privacy Case.

You set processing options to specify the default values for the establishment and year. You can change the year to search prior years. The system populates the Employee field with the address book number of the person performing the search. To display information for all employees, leave the Employee field blank. If you mark an employee's case as a privacy case, the system does not populate the Employee Name field with the name of the employee. Instead, the system uses the term *Privacy Case* in the Employee Name field. The system also displays the alternate injury / illness description. The system will only allow you to search using your address book number or using a blank value. The Query By Example line (QBE) is not available for the Employee Name and Injury/Illness Description column to ensure integrity of the privacy case filters.

Figure 3–8   Incident Case Inquiry
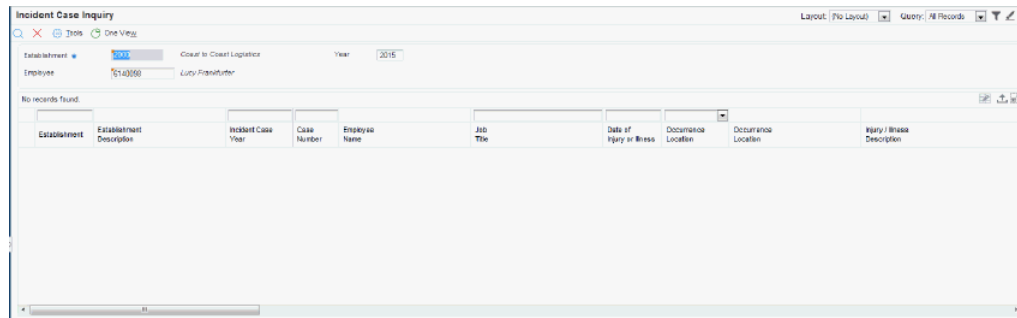
3.4.2 Form Used to Inquire On Cases

Form Name	Form ID	Navigation	Usage
Incident Case Inquiry	W54HS210A	Daily Processing (G54HS10), Incident Case Inquiry (P54HS210)	Inquire about case details for injured or ill employees.

3.4.3 Setting Processing Options for the Case Inquiry Program (P54HS210)

Processing options enable you to specify the default processing for programs and reports.

3.4.3.1 Defaults

1. Establishment (Required)
You use this processing option to specify the establishment for inquiry in the Incident Case Inquiry program (P54HS210). You must set this processing option to enter a value in the Establishment field in the Incident Case Inquiry program. The Establishment field is disabled in the Incident Case Inquiry program.

2. Default Establishment Based on Logged In User (Release 9.1 Update)
You use this processing option to indicate whether the system will default to the establishment by looking up the current establishment associated with the logged-in user from the Employee Supplemental Data. This processing option takes precedence over processing option 1 (Establishment). If no establishment is set up for the logged-in user, then the system uses the default value provided in processing option 1 (Establishment). Values are:

Blank: Do not set the default establishment based on the logged-in user.

1: Set the default establishment based on the logged-in user's Employee Supplemental Data setup.

3. Lock Establishment Filter Field (Release 9.1 Update)
You use this processing option to lock the Establishment field and prevent it from being edited. Values are:

Blank: Do not lock the Establishment field.

1: Lock the Establishment field.

4. Century/Year

You use this processing option to enter the century and year information that is used in the Incident Case Inquiry program (P54HS210). If you leave this option blank, the system populates the current system century and the year to the field in the header.

3.5 Entering Safety Hours

This section provides an overview of the Safety Hours Entry program (P54HS20) and lists the form used to enter safety hours.

3.5.1 Understanding the Safety Hours Entry Program (P54HS20)

If you are not using the JD Edwards EnterpriseOne Payroll system, you need to enter your safety hour totals manually. Use the Safety Hours Entry program (P54HS20) to enter the monthly totals for each organizational unit you need to calculate statistics for, such as: establishment, business unit, project, company, and contractor. If safety hours exist in both the Safety Hours table (F54HS20) and the JD Edwards EnterpriseOne Payroll system, you can choose which to use. The system uses the value specified in the processing option for these programs. The system cannot retrieve contractor hours from the payroll tables, so the system will only look in the Safety Hours table for contractor safety hours.

You can also record monthly and annual totals for other metrics such as miles driven, number of deliveries made, and so on, in addition to safety hours. This enables you to calculate incident frequency rates using these metrics in addition to rates based on safety hours.You enter safety hours for each calendar month. The annual total must equal the sum of the months, unless you leave all of the months blank. If you leave the annual total blank, it will automatically populate based on the total of the monthly buckets. You can also enter the annual average number of employees. You can use the Safety Hours Group field in the header to filter the grid rows. To create a new safety hours record, go to the end of the grid rows and click in a new row.

Figure 3–9   Safety Hours Entry

3.5.1.1 Understanding How the System Determines Safety Hours

Safety hours are the number of hours that employees were available to work and have worked and hence, were exposed to risk. Safety hours exclude time for vacation, sick or medical leave, or other leave time.

The following programs use safety hours:

- OSHA Form 300A - Summary of Work-Related Injuries and Illnesses (R54HS300A).

- Bureau of Labor Statistics Survey of Occupational Injuries and Illnesses Form (R54HS320).

■ One View Safety Statistics Inquiry (P54HS260).

In each of these programs, you can choose whether to retrieve safety hours from the JD Edwards EnterpriseOne Payroll tables or from the Health and Safety Incident Management Safety Hours table (F54HS20). You can also choose to use the Safety Hours table as an override to any payroll table information. The OSHA and BLS reports only use establishment for calculating safety hours. Only the One View Safety Statistics Inquiry program can use Company, Project, Business Unit, and Contractor.

3.5.1.1.1 Safety Hours Retrieved from Safety Hours Table (F54HS20) The system retrieves the safety hours from the F54HS20 for the specific safety hours group for a specific calendar month/year. A safety hours group can be an establishment, company, business unit, project, or contractor.

3.5.1.1.2 Safety Hours Retrieved from Payroll Tables The system retrieves safety hours from the payroll tables for all employees associated with the organizational unit (establishment, company, business unit, or project). The system cannot retrieve contractor safety hours from the payroll tables and so, the contractor safety hours must be entered in the Safety Hours table (F54HS20). The system uses the HR supplemental data to determine all of the employees for the establishment and then retrieves the employee time cards. The system retrieves the payroll time cards directly by company. The system retrieves all of the business units from the Business Unit Master table (F0006) by project and then retrieves the time cards by business unit. The system retrieves the payroll time cards directly by business unit.

3.5.1.1.3 Safety Hours Table as an Override to Payroll Tables Hours If you choose to use the F54HS20 table to override the payroll hours, the system searches the Safety Hours table first to determine the information. If it is not able to find a match, it will then look in the payroll tables. The system cannot retrieve contractor hours from the payroll tables, so the system will only look in the Safety Hours table for contractor safety hours.

3.5.2 Form Used to Enter Safety Hours

Form Name	Form ID	Navigation	Usage
Safety Hours Entry	W54HS20A	Advanced Operations (G54HS31), Safety Hours Entry (P54HS20)	Enter safety hours.

3.6 Inquiring on Tasks (Release 9.1 Update)

This section provides an overview of the Incident Task Inquiry program (P54HS215), lists the form used to inquire on tasks, and discusses how to set processing options for the Incident Task Inquiry program.

3.6.1 Understanding the Incident Task Inquiry Program (P54HS215)

Incident Task Inquiry program (P54HS215) is a special program that provides a view for tasks associated with incidents. Incident Task Inquiry program provides inquiry access to all of the fields in the task record and the incident master. You can view a subset of those fields by using the Basic Grid format option in the grid. (Release 9.1 Update) The application can default in the address book number of the user into the Assigned To field in the header, and filter to show tasks assigned to that user based on a processing option setting. You can filter the tasks by using Advanced Query feature.

You can also filter the tasks by using the header fields of Task Type, Task Status, and Task Priority, any of the Query By Example line (QBE) in the grid columns.

You must set the processing options to specify whether to lock or unlock the Assigned To field. The Lock Assigned To Filter Field processing option restricts the user from viewing tasks assigned to other people. If an Incident Handler or Incident Investigator want to view all tasks for incidents associated with their address book, they must set the Lock Assigned To Filter Field processing option to be unlocked. Incident Handler or Incident Investigator must replace the default value with an asterisk (*), and enter their address book number in the QBE. You must set the Incident Master (P54HS00) processing option to control the version of the Incident Master to drill down the incident number in the grid.

3.6.2 Form Used to Inquire On Tasks

Form Name	Form ID	Navigation	Usage
Incident Task Inquiry	W54HS215A	Daily Processing (G54HS10), Incident Task Inquiry (P54HS215)	Inquire about incident task details.

3.6.3 Setting Processing Options for the Task Inquiry Program (P54HS215)

Processing options enable you to specify the default processing for programs and reports.

3.6.3.1 Process

1. Lock Assigned To Filter Field
You use this processing option to lock the Assigned To field and restrict from being edited.

2. Default Assigned To Address
You use this processing option to control whether the logged in user's Address Book number is defaulted into the Assigned To header field or not.

3.6.3.2 Versions

1. Incident Master (P54HS00)
You use this processing option to specify the version of the Incident Master program (P54HS00). Incident Task Inquiry program will use this version's processing option to access the Incident Master when you select the Incident Number to drill down into the incident record. If you leave this option blank, the system uses the default version ZJDE0001.

The Incident Master version will also define whether or not the Send Reminder button will appear in the header of this application and will be used to determine who will receive the message.

3.7 Generating the Task Tickler Reminder Report (Release 9.1 Update)

This section provides an overview of the Task Tickler Reminder program (R54HS420) and discusses how to set up processing options for this program.

3.7.1 Understanding the Task Tickler Reminder Program

The Task Tickler Reminder program (R54HS420) is used to automate the sending of reminder messages to people associated with incident tasks. Processing options enable you to define the number of days in advance (entered as a negative number in the processing option) or number of days after (entered as a positive number) the Task Ending Date to identify tasks that are due or are overdue. You also select who will be reminded: Task Assignee, Task Assignee's Supervisor, Incident Handler, Incident Investigator, Incident Reported By, or Incident Originator. You can print a report showing which tasks were selected and where messages were sent as reminders.

3.7.2 Running the Task Tickler Reminder Program

Select Periodic Processing (G54HS20), Task Tickler Reminder.

3.7.3 Setting Processing Options for Task Tickler Reminder Report (R54HS420)

Processing options enable you to specify the default processing for programs and reports.

You can configure the Task Tickler Reminder Report through processing options that control how tasks are selected based on the Task Ending Date and who will receive a reminder message.

3.7.3.1 Process

1. Tickler Days
Use this processing option to specify the number of days + or - from the Task Ending Date to send task reminders. If today is greater than or equal to the Task Ending Date + or - the specified tickler days, then the reminder notification will be sent for the task.

2. Notify Task Assigned To Address
Use this processing option to specify whether the Task Assigned To Address is sent a reminder for the selected incident task. Values are:

Blank: Do not notify the Assigned To Address.

1: Notify the Assigned To Address by sending the task reminder.

3. Notify Incident Originator Address
Use this processing option to specify whether the Incident Originator Address is sent a reminder for the selected incident task. Values are:

Blank: Do not notify the Incident Originator Address.

1: Notify the Incident Originator Address by sending the task reminder.

4. Notify Incident Reported By Address
Use this processing option to specify whether the Incident Reported By Address is sent a reminder for the selected incident task. Values are:

Blank: Do not notify the Incident Reported By Address.

1: Notify the Incident Reported By Address by sending the task reminder.

5. Notify Incident Investigated By Address
Use this processing option to specify whether the Incident Investigated By Address is sent a reminder for the selected incident task. Values are:

Blank: Do not notify the Incident Investigated By Address.

1: Notify the Incident Investigated By Address by sending the task reminder.

6. Notify Incident Handler Address
Use this processing option to specify whether the Incident Handler Address is sent a reminder for the selected incident task. Values are:

Blank: Do not notify the Incident Handler Address.

1: Notify the Incident Handler Address by sending the task reminder.

7. Notify Task Assigned To Supervisor Address
Use this processing option to specify whether the Task Assigned To Supervisor Address is sent a reminder for the selected incident task. Values are:

Blank: Do not notify the Task Assigned To Supervisor.

1: Notify the Task Assigned To Supervisor Address by sending the task reminder.

4

Reporting Incidents

This chapter contains the following topics:

- Section 4.1, "Understanding Regulatory Incident Reporting"

- Section 4.2, "Generating the OSHA 300 Log Report and OSHA 300A Summary Report"

- Section 4.3, "Generating the OSHA 301 Injury/Illness Report (R54HS301)"

- Section 4.4, "Generating the Bureau of Labor Statistics (BLS) Survey Report (R54HS320)"

- Section 4.5, "Generating the Detailed Incident Report"

4.1 Understanding Regulatory Incident Reporting

The Occupational Safety and Health Administration (OSHA) is an agency created in 1970 by the United States Congress to help employers and employees reduce the number of job injuries, illnesses, and deaths. Many other countries around the world have similar agencies dedicated to the same mission. OSHA requires employers to record and report work-related injuries, illnesses, and fatalities.

The Bureau of Labor Statistics (BLS) of the U.S. Department of Labor is a Federal agency responsible for measuring working conditions and other economic and market indicators. The BLS Injuries, Illnesses, and Fatalities (IIF) program gathers and reports the statistics related to work-related injuries, illnesses, and fatal incidents and analyzes how these statistics vary by key demographics. The information it collects from employers is very similar to the information collected by OSHA.

To support the reporting requirements for OSHA and the BLS, the JD Edwards EnterpriseOne Health and Safety Incident Management system provides the following reports:

- OSHA Form 300: Log of Work-Related Injuries and Illnesses.

- OSHA Form 300A: Summary of Work-Related Injuries and Illnesses.

- OSHA Form 301: Injury and Illness Incident Report.

- Survey of Occupational Injury and Illness Form (BLS-9300 N06).

4.2 Generating the OSHA 300 Log Report and OSHA 300A Summary Report

This section provides an overview of the OSHA 300 Log report and the OSHA 300A Summary report and discusses how to:

- Run the OSHA 300 Log report.

- Set processing options for OSHA 300 Log report (R54HS300).

- Run the OSHA 300A Summary report.

- Set processing options for OSHA 300A Summary report (R54HS300A).

4.2.1 Understanding the OSHA 300 Log Report and the OSHA 300A Summary Report

Use the OSHA 300 Log report to classify and report work-related injuries and illnesses, including what happened, how it happened, and the severity and extent for each case.

Use the OSHA 300A Summary report to total the detailed case information for each establishment for each calendar year. Employers must post the summary from the previous year in a place where workers can view the report.

4.2.2 Running the OSHA 300 Log Report

Select Periodic Processing (G54HS20), OSHA 300 Log Report.

4.2.3 Setting Processing Options for OSHA 300 Log Report (R54HS300)

Processing options enable you to specify the default processing for programs and reports.

4.2.3.1 Process

1. Enter Reporting Century/Year
Enter the century and year that the system uses for OSHA reports. If you leave this processing option blank, the system uses the current century and year date.

4.2.4 Running the OSHA 300A Summary Report

Select Periodic Processing (G54HS20), OSHA 300A Summary Report.

Before you run the OSHA 300A Summary Report, you need to enter an establishment condition record for each establishment for each calendar year that you report. The report cannot retrieve data without the establishment condition record. You can access Establishment Conditions program (P086011) from the Health and Safety Incident Setup menu (G54HS41). Enter an establishment condition record even if nothing unusual happened during the calendar year. The report will not process unless you enter an establishment condition for the establishment and the calendar year being reported on.

(Release 9.1 update) You can associate a company with the establishment in the P086011 program. This association of company and establishment can be leveraged in the Incident Master program (P54HS00) to default in the company based on the establishment using this relationship. Use the P086011 program to record a change reason if you are re-submitting the electronic version of the 300A to OSHA. The program will use the most recent change reason recorded.

Use the Establishment Condition program (P086011) to enter the following additional information about an establishment:

- **Maximum Size**

  Enter a code that represents the maximum number of employees that have worked at an establishment at any point in the reporting year.

■ **Form Exit Establishment Information**

Use this form exit to associate a company with an establishment and to define the establishment type. This information is used when submitting an electronic file to OSHA for the 300A report.

■ **Row Exit Change Reason**

Use this row exit to record a reason why you are re-submitting an electronic file to OSHA. If there is more than one change reason given for the same establishment/year/report type combination, the re-submitted electronic file will use the one with the highest sequence number.

4.2.5 Setting Processing Options for OSHA 300A Summary Report (R54HS300A)

Processing options enable you to specify the default processing for programs and reports.

4.2.5.1 Process

1. Enter Reporting Century/Year
Enter the century and year that the system uses for OSHA reports. If you leave this processing option blank, the system uses the current century and year date.

2. Specify where safety hours and average number of employees are retrieved from
Specify how the system retrieves the safety hours. Values are:

Blank: Retrieve safety hours and from the Incident Safety Hours table (F54HS20). If you leave this processing option blank, the system uses safety hour totals from the F54HS20 table. You need to populate the table with your monthly safety hours for each year being analyzed for each establishment.

1: Retrieve pay records from the Employee Transaction History table (F0618). If you select **1**, the system uses the payroll records to determine safety hours from the F0618 table. The system uses PDBA codes to account for vacation or leave time, which are not considered part of safety hours.

2: Consider safety hour totals in the Incident Safety Hours table (F54HS20) an override to pay records in the Employee Transaction History table (F0618). If you select **2**, the system first searches the safety hours in the F54HS20 table to find a record for establishment unit and year being analyzed. If the system finds a match, it uses the information in the table. If it does not, the system searches for any data in the F0618 table.

3. Company Executive Name
Enter the company executive name that the system displays on the OSHA 300A report.

4. Title
Enter the title of the company executive that the system displays on the OSHA 300A report.

5. Phone Number
Enter the phone number for the company executive that the system displays on the OSHA 300A report.

6. Date
Enter the date that the system displays on the OSHA 300A report. If you leave this processing option blank, the system uses the system date.

7. Report Output (Release 9.1 Update)
Use this processing option to generate both the OSHA form 300A electronic CSV
format and the standard selected UBE format (PDF, RTF, HTML, and so on). Values
are:

Blank: Generate only the standard selected UBE format.

1: Generate both the electronic CSV format and the standard selected UBE format.

8. File Path for Electronic CSV Format (Release 9.1 Update)
Enter the location where the system will save the OSHA 300A electronic CSV format.
You must define this location when you request the electronic CSV format.

> **Note:** The file path is a server path when the report is generated on a
> server. To specify a local path you need to install the JD Edwards
> application locally.

9. File Name for Electronic CSV Format (Release 9.1 Update)
Use this optional processing option to define the name of OSHA 300A CSV file. If the
processing option is blank, the system generates a file name.

> **Note:** OSHA - 300 Injury and Illness Audit Report (R086020) is
> generated when the processing options are set to generate the CSV
> file. The audit report shows any validation error between the CSV file
> and the OSHA data standards for electronic submission.

4.3 Generating the OSHA 301 Injury/Illness Report (R54HS301)

This section provides an overview of the OSHA 301 Injury/Illness report and
discusses how to:

- Run the OSHA 301 Injury/Illness report.

- Set processing options for OSHA 301 Injury/Illness report (R54HS301).

4.3.1 Understanding the OSHA 301 Injury/Illness Report

You use the OSHA 301 Injury and Illness Incident report to record the details of each
case. This report helps OSHA understand the extent and severity of work-related
cases.

4.3.2 Running the OSHA 301 Injury/Illness Report

Select Periodic Processing (G54HS20), OSHA 301 Injury/Illness Report.

(Release 9.1 Update) Before you run the OSHA 301 Injury/Illness Report, you need to
enter an establishment condition record for each establishment for each calendar year
that you report. The report cannot retrieve data without the establishment condition
record. You can access the Establishment Conditions program (P086011) from the
Health and Safety Incident Setup menu (G54HS41). Enter an establishment condition
record even if nothing unusual happened during the calendar year. The report will not
process unless you enter an establishment condition for the establishment and
calendar year being reported on.

4.3.3 Setting Processing Options for OSHA 301 Injury/Illness Report (R54HS301)

Processing options enable you to specify the default processing for programs and reports.

4.3.3.1 Process

1. Enter Reporting Century/Year
Enter the century and year that the system uses for OSHA reports. If you leave this processing option blank, the system uses the current century and year date.

2. Completed By
Enter the name that the system displays on the OSHA 301 report.

3. Title
Enter the title of the person who completed the report. The system displays the tile on the OSHA 301 report.

4. Phone Number
Enter the phone number for the person who completed the report. The system displays the phone number on the OSHA 301 report. The system displays the phone number in Section 4 of the report.

5. Date
Enter the date that the system displays on the OSHA 301 report. If you leave the Date processing option blank, the system uses the system date.

4.4 Generating the Bureau of Labor Statistics (BLS) Survey Report (R54HS320)

This section provides an overview of the Bureau of Labor Statistics Survey report and discusses how to:

- Run the BLS Survey report.

- Set processing options for the BLS Survey report (R54HS320).

4.4.1 Understanding the Bureau of Labor Statistics (BLS) Survey Report

The BLS can request that you generate the BLS Survey of Occupational Injuries and Illnesses Form. The data on this form is very similar to the information presented on the OSHA reports.

Before you run the BLS Survey report, be sure to enter an establishment condition record for each establishment for each calendar year that you report. The report will not retrieve any data without the establishment condition record. You can access Establishment Conditions program (P086011) from the Health and Safety Incident Setup menu (G54HS41).

4.4.2 Running the BLS Survey Report

Select Periodic Processing (G54HS20), BLS Survey Report.

4.4.3 Setting Processing Options for the BLS Survey Report (R54HS320)

Processing options enable you to specify the default processing for programs and reports.

4.4.3.1 Process

1. Enter Reporting Century/Year
Enter the century and year that the system uses for the BLS report. If you leave this processing option blank, the system uses the current century and year.

2. Specify where safety hours and average number of employees are retrieved from
Specify how the system retrieves the safety hours and average number of employees.

This report uses the same logic as the OSHA 300A report (R54HS300A) to retrieve this information. Values are:

Blank: Incident Safety Hours table (F54HS20)

1: Employee Transaction History table (F0618)

2: Use Incident Safety Hours table (F54HS20) as an override to pay records in the Employee Transaction History table (F0618)

3. Account Number
Enter the account number assigned to the establishment by the Bureau of Labor Statistics. The system prints the account number in Section 1 of the Survey of Occupational Injuries and Illnesses report.

4. Completed By
Enter the name of the person completing the Bureau of Labor Statistics Survey of Occupational Injuries and Illnesses report. The system displays the name in Section 4 of the report (Name).

5. Title
Enter the title of the person completing the Bureau of Labor Statistics Survey of Occupational Injuries and Illnesses report. The system displays the title in Section 4 of the report.

6. Phone Number
Enter the phone number of the person completing the Bureau of Labor Statistics Survey of Occupational Injuries and Illnesses report. Enter the phone number in the format that you want the system to display.

7. Phone Extension
Enter the phone extension of the person completing the Bureau of Labor Statistics Survey of Occupational Injuries and Illnesses report. Enter the phone extension in the format in which you want it to appear in the report. The system displays the phone extension in Section 4 of the report.

8. Fax Number
Enter the fax number of the person completing the Bureau of Labor Statistics Survey of Occupational Injuries and Illnesses report. Enter the fax number in the format in which you want it to appear in the report. The system displays the fax number in Section 4 of the report.

4.5 Generating the Detailed Incident Report

This section provides an overview of the Detailed Incident report and discusses how to set processing options for the Detailed Incident report (R54HS400).

4.5.1 Understanding the Detailed Incident Report

The Detailed Incident report displays incident information such as detailed incident description, where and when the incident occurred, who is responsible for the incident, and people and equipment related to the incident.

4.5.2 Running the Detailed Incident Report

Select Periodic processing (G54HS10), Detailed Incident Report.

4.5.3 Setting Processing Options for Detailed Incident Report (R54HS400)

Processing options enable you to specify the default processing for programs and reports. You can configure the Detailed Incident Report through processing options that control each section of the report and whether to print the section or not. You can also configure the report to print just the information that you want to display.

4.5.3.1 Print

1. Print People Information by Incident Role
Specify the role of the person involved in the incident that you want to print in the Detailed Incident report. Only people with the specified role will print on the report. Value is:

Blank: Print All People

2. Print Property/Equipment Information
Specify whether the system prints the property equipment information in the incident. Values are:

Blank: Do not print Property/Equipment Information

1: Print Property/Equipment Information

3. Print Environmental Information
Specify whether the system prints the environmental information in the incident. Values are:

Blank: Do not print Environmental Information

1: Print Environmental Information

4. Print Cost Information
Specify whether the system prints the cost information in the incident. Values are:

Blank: Do not print Cost Information

1: Print Cost Information

5. Print Agency Information
Specify whether the system prints the agency information in the incident. Values are:

Blank: Do not print Agency Information

1: Print Agency Information

6. Print Task Information
Specify whether the system prints the task information in the incident. Values are:

Blank: Do not print Task Information

1: Print Task Information

7. Print Notification Information

Specify whether the system prints the email sent notification information in the incident. Values are:

Blank: Do not print Notification Information

1: Print Notification Information

8. Print Detailed Description

Specify whether the system prints the Incident Investigation - Detailed Description media object. Values are:

Blank: Do not print the detailed description

1: Print the detailed description

5

Using One View Reporting to Review Incidents

This chapter contains the following topics:

5.1 Understanding One View Reporting for the JD Edwards EnterpriseOne Health and Safety Incident Management System

You use the JD Edwards EnterpriseOne One View Reporting for Health and Safety Incident Management system to analyze and report on health and safety incidents. There are five One View Reporting programs in the JD Edwards EnterpriseOne Health and Safety Incident Management system:

- One View Incident Summary Inquiry program (P54HS220)

- One View Incident People Inquiry program (P54HS230)

- One View Incident Equipment Inquiry program (P54HS240)

- One View Incident Environment Inquiry program (P54HS250)

- One View Incident Safety Statistics Inquiry program (P54HS260)

> **See:** "One View Reporting for Health and Safety Incident Management" in the *JD Edwards EnterpriseOne Applications One View Reporting User Guide*

The One View Reporting programs for the JD Edwards EnterpriseOne Health and Safety Incident Management system enable you to analyze incidents by the people involved, equipment involved, key incident attributes, incident classifications, costs, and environmental impact details. You can associate an incident with different types of records, for example, people records, equipment records, and so on. These records are associated to the incident in a one-to-many relationship, which means that an incident can have many people or many equipment records associated with it. These records are related to the incident, however, they may not be related to each other. You can also associate an incident with other types of records, such as agencies, tasks, environmental impact details and costs, in a one-to-many relationship. The One View Reporting for Health and Safety Incident Management programs facilitate searching and reporting on incidents, people, equipment, and environmental impact records, and calculates safety metrics.

To search and report on agencies, tasks, and costs, you can use specialized business views.

The system stores each type of incident record in different tables as illustrated in the following graphic.

Figure 5–1   Tables Used to Store Incident Records
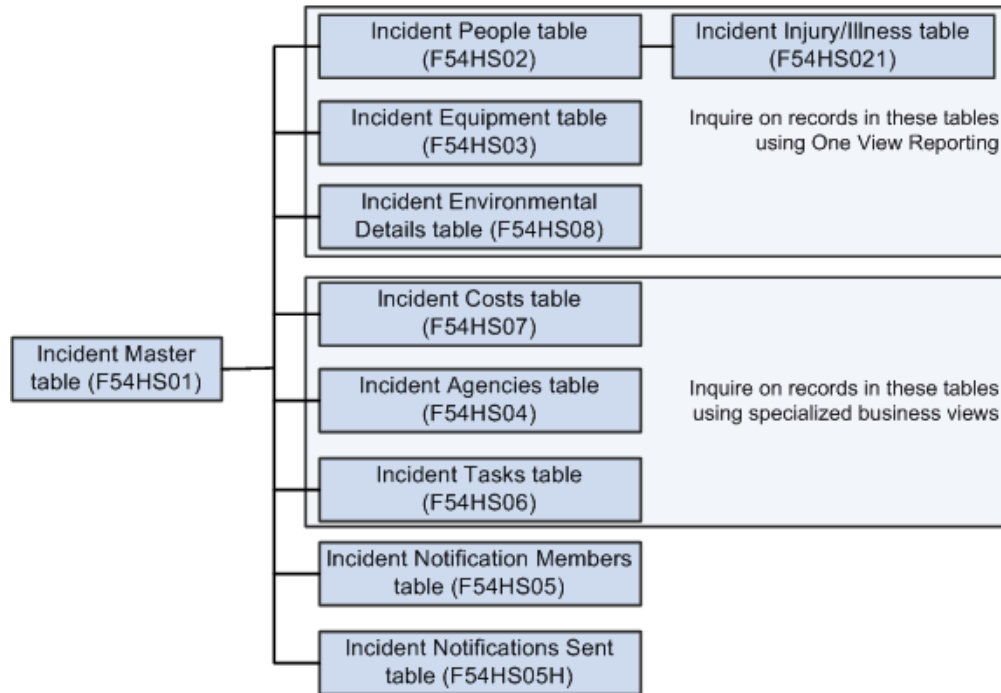
5.2 Using Specialized Business Views for Additional One View Reporting

This section provides an overview of the specialized business views for additional One View Reporting and discusses how to access the specialized business views for additional One View Reporting.

5.2.1 Understanding Specialized Business Views for Additional One View Reporting

If you want to search across incidents for common agency or costs information, you can use the additional specialized business views:

- Incident and Agencies Join - One View business view (V54HS04B)

  You can use the V54HS04B business view to search for agencies across all incidents. For example, you can search for all incidents where a common agency was involved. The V54HS04B business view has all the columns from the Incident Master table (F54HS01), excluding the five audit fields and the four media object fields, and all columns from the Incident Agencies table (F54HS04), excluding the audit fields.

- Incident and Costs Join - One View business view (V54HS07B)

  You can use the V54HS07B business view to search for costs across all incidents. For example, you can search for all incidents with the same cost types. The V54HS07B business view has all of the columns from the Incident Master table (F54HS01), excluding the five audit fields and the four media object fields, and all columns from the Incident Costs table (F54HS07), excluding the audit fields.

5.2.2 Accessing the Specialized Business Views for Additional One View Reporting

To access the specialized business views, complete the following steps:

1. Enter Databrowser in the Fast Path field to access the Query Selector form.

2. On the Query Selector form, select the By Business View option and click on the Visual Assist button for the Name field.

3. On the Business View Search & Select form, enter V54HS* in the Object Name Query By Example (QBE) field and *One View in the Member Description QBE field. The system displays the business views for the Health and Safety Incident Management system in the grid.

4. After you select the business view you want, you can see and access all the records. You can search the business views using the header fields, the Query By Example (QBE) line, or the Advance Query features. You can export from the grid using the Tools icon in the toolbar or build custom reports using the One View icon.

6

Purging Incident Records

This chapter contains the following topics:

6.1 Understanding the Incident Management Purge Program (R54HS410)

You run the Incident Management Purge program (R54HS410) to purge incident records.

You can set a processing option to run the program in proof or final mode. You select the incident records that you want to purge using data selection and run the Incident Management Purge program. The system generates a report that lists the incident number, incident description, the date the incident occurred, additional tables, and the number of incidents that you have selected to purge. Additional tables include tables related to people, additional injury or illness, equipment, agencies, notifications, tasks, costs, and environment. The report also lists from which additional tables the data was purged.

You can run the program in proof mode to verify whether the incident records that you have selected to purge are accurate. You run the program in final mode to delete records for selected incidents from the Incident Master table (F54HS01), additional tables, all associated media objects and change history tables. If you have not selected any incident records, the report lists that you have not selected any data. The change history tables will be deleted regardless of the processing option on P54HS00 related to deleting incidents. That processing option does not apply to the purge program.

6.2 Running the Incident Management Purge Program (R54HS410)

Select Advanced Operations (G54HS31), Incident Management Purge (R54HS410).

6.3 Setting Processing Options for the Incident Management Purge Program (R54HS410)

Processing options enable you to specify the default processing for programs and reports.

6.3.1 Process

1. Proof or Final Mode

Specify whether the system runs the Incident Management Purge report in proof or final mode. Values are:

Blank: Proof mode

1: Final mode

Glossary

Average Annual Number of Employees

The total number of employees who are paid in all pay periods divided by the number of pay periods. Employees include full-time, part-time, seasonal, temporary, hourly, and salaried employees.

Bureau of Labor and Statistics (BLS)

The principal fact-finding agency for the U.S. Federal Government in the broad field of labor economics and statistics.

Case or OSHA Recordable Case

A case that you report in the system when an employee is injured or ill on the job as a result of an occupational incident, resulting in death, days away from work, restricted work or transfer to another job, medical treatment beyond first aid, or loss of consciousness. A single incident may result in more than one employee getting injured, so a single incident may result in more than one case.

Complex Injury

An injury is complex when a person suffers from more than one injury or illness due to a single incident.

CafeOne - Composite Application Framework

A JD Edwards EnterpriseOne tools feature that provides a configurable frame to display context sensitive links that are external to JD Edwards EnterpriseOne systems.

Days Away and Work Restricted Transfer (DART)

An occurrence rate of incidents with recordable cases that involve days away from work, days of restricted work activity, or job transfer.

Days Away From Work Case

A case that you record for an employee who is absent from work for one or more days as a result of an occupational injury or illness. This is a classification that is subject to reporting to OSHA and the BLS.

Establishment

As defined by OSHA, an organization is an establishment if the organization is involved in the same work activity and therefore exposed to the same risk. An establishment for OSHA reporting purposes is defined as a single physical location where like business is conducted or where services or industrial operations are performed.

Failure Analysis

The process of collecting and analyzing data to determine the cause of a failure.

Incident

An occupational health and safety event that can involve security, environmental damage or exposure, motor vehicle incident or damage, asset or property damage, and illness or injury.

Incident Frequency Rate

The number of recordable injuries and illnesses that occurs to a specific number of full-time workers, usually 100 full-time workers, over a given period of time, usually a year.

Incident Impact Rate

The rate that measures the financial or lost time impact of incidents.

Lost Time Case

A case that results in either days away from work, restricted work activity, or job transfer.

Lost Time Incidents (LTI)

An incident that has one or more cases resulting in either days away from work, restricted work activity, or job transfer.

OIICS - Occupational Injury and Illness Classification System

A classification system that the BLS uses to code the case characteristics of injuries, illnesses, and fatalities in the Survey of Occupational Injuries and Illnesses (SOII), and the Census of Fatal Occupational Injuries (CFOI) programs. This manual contains the rules of selection, code descriptions, code titles, and indices, for the following code structures:

- Nature of Injury or Illness.

- Part of Body Affected.

- Source of Injury or Illness.

- Event or Exposure.

- Secondary Source of Injury or Illness.

OSHA - Occupational Safety and Health Administration

A federal agency of the United States that regulates workplace safety and health.

Other Recordable Case

An OSHA injury/illness classification that you use to report anything other than death, days away from work, restricted work, or job transfer.

People Level of Detail

A term used in the One View Incident People Inquiry program (P54HS230) to indicate the source of data for the rows in the grid. You use the People Level of Detail information to accurately count people and injuries and illnesses.

Level of Detail = 1 represents a person's record in the Incident People table (F54HS02) without the association of any injury or illness records in the Incident Injury/Illness table (F54HS021).

A Level of Detail = 2 represents a person's record in the Incident People table (F54HS02) with the first additional injury or illness record for that person in the Incident Injury/Illness table (F54HS021).

A Level of Detail = 3 represents a person's record in the Incident People table (F54HS02) with a subsequent additional injury or illness record for that person in the Incident Injury/Illness table (F54HS021).

Privacy Case

A case that is private in nature or the people involved in the case have requested to keep the details of the case private. Privacy cases are reported without revealing the person's name and with an alternate, less intimate description of their injury or illness.

Recordable Injury Case

A case with an injury classification such as:

- Death
- Restricted Work
- Days Away or Other Recordable Cases

Recordable Incident

An incident that has one or more employees injured or ill on the job.

OSHA Reportable Case

A work-related injury or illness that require employers to contact OSHA within a certain number of hours. Reportable incidents include fatalities, serious injuries resulting in in-patient hospitalization, amputations or loss of an eye.

Restricted Work Case

 A case that you report when an employee is injured or is ill on the job for which the injury or illness causes the employer or health care professional to recommend that the employee avoid doing the routine functions of his or her job. It also includes incidents in which the employer or health care professional recommends that the employee avoids working the full workday that the employee would have been scheduled to work if not injured or ill.

Record Type (Release 9.1 Update)

A user defined field to classify different uses of the incident master record. This is useful when analyzing incidents.

Safety Hours

The hours defined as hours that an employee has worked or is available to work.

Safety Hours Group

An organizational unit that you can report or analyze. The organizational unit includes establishments, companies, business units, projects, and contractors.

Safety Metric Basis

A method to count events to analyze incidents by safety hours, miles or kilometers driven, or deliveries made.

TRIF - Total Recordable Incident Frequency

The incident frequency rate for all recordable incidents that generally includes reportable cases.

Workers Compensation

A form of insurance that provides wage replacement and medical benefits to employees injured in the course of employment. An employer provides this insurance in exchange for mandatory relinquishment of the employee's right to sue the employer for negligence.

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