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# PeopleSoft HCM 9.2: PeopleSoft Human Resources Monitor Health and Safety

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# Preface

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## Understanding the PeopleSoft Online Help and PeopleBooks

The PeopleSoft Online Help is a website that enables you to view all help content for PeopleSoft applications and PeopleTools. The help provides standard navigation and full-text searching, as well as context-sensitive online help for PeopleSoft users.

### Hosted PeopleSoft Online Help

You can access the hosted PeopleSoft Online Help on the [Oracle Help Center](#). The hosted PeopleSoft Online Help is updated on a regular schedule, ensuring that you have access to the most current documentation. This reduces the need to view separate documentation posts for application maintenance on My Oracle Support. The hosted PeopleSoft Online Help is available in English only.

To configure the context-sensitive help for your PeopleSoft applications to use the Oracle Help Center, see [Configuring Context-Sensitive Help Using the Hosted Online Help Website](#).

### Locally Installed PeopleSoft Online Help

If you're setting up an on-premises PeopleSoft environment, and your organization has firewall restrictions that prevent you from using the hosted PeopleSoft Online Help, you can install the online help locally. Installable PeopleSoft Online Help is made available with selected PeopleSoft Update Images and with PeopleTools releases for on-premises installations, through the [Oracle Software Delivery Cloud](#).

Your installation documentation includes a chapter with instructions for how to install the online help for your business environment, and the documentation zip file may contain a README.txt file with additional installation instructions. See *PeopleSoft 9.2 Application Installation* for your database platform, "Installing PeopleSoft Online Help."

To configure the context-sensitive help for your PeopleSoft applications to use a locally installed online help website, see [Configuring Context-Sensitive Help Using a Locally Installed Online Help Website](#).

### Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format on the [Oracle Help Center](#). The content in the PeopleBook PDFs is the same as the content in the PeopleSoft Online Help, but it has a different structure and it does not include the interactive navigation features that are available in the online help.

### Common Help Documentation

Common help documentation contains information that applies to multiple applications. The two main types of common help are:

- Application Fundamentals

- Using PeopleSoft Applications

Most product families provide a set of application fundamentals help topics that discuss essential information about the setup and design of your system. This information applies to many or all applications in the PeopleSoft product family. Whether you are implementing a single application, some combination of applications within the product family, or the entire product family, you should be familiar with the contents of the appropriate application fundamentals help. They provide the starting points for fundamental implementation tasks.

In addition, the *PeopleTools: Applications User's Guide* introduces you to the various elements of the PeopleSoft Pure Internet Architecture. It also explains how to use the navigational hierarchy, components, and pages to perform basic functions as you navigate through the system. While your application or implementation may differ, the topics in this user's guide provide general information about using PeopleSoft applications.

## Field and Control Definitions

PeopleSoft documentation includes definitions for most fields and controls that appear on application pages. These definitions describe how to use a field or control, where populated values come from, the effects of selecting certain values, and so on. If a field or control is not defined, then it either requires no additional explanation or is documented in a common elements section earlier in the documentation. For example, the Date field rarely requires additional explanation and may not be defined in the documentation for some pages.

## Typographical Conventions

The following table describes the typographical conventions that are used in the online help.

| <b><i>Typographical Convention</i></b> | <b><i>Description</i></b>                                                                                                                                                                                                                   |
|----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Key+Key</b>                         | Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For <b>Alt+W</b> , hold down the <b>Alt</b> key while you press the <b>W</b> key. |
| <b>. . . (ellipses)</b>                | Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.                                                                                                                                        |
| <b>{ } (curly braces)</b>              | Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ( ).                                                                                                                                            |
| <b>[ ] (square brackets)</b>           | Indicate optional items in PeopleCode syntax.                                                                                                                                                                                               |
| <b>&amp; (ampersand)</b>               | When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object.<br><br>Ampersands also precede all PeopleCode variables.                                                  |

| <b><i>Typographical Convention</i></b> | <b><i>Description</i></b>                                                                                                                                                                                                          |
|----------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| ⇒                                      | This continuation character has been inserted at the end of a line of code that has been wrapped at the page margin. The code should be viewed or entered as a single, continuous line of code without the continuation character. |

## ISO Country and Currency Codes

PeopleSoft Online Help topics use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

ISO country codes may appear as country identifiers, and ISO currency codes may appear as currency identifiers in your PeopleSoft documentation. Reference to an ISO country code in your documentation does not imply that your application includes every ISO country code. The following example is a country-specific heading: "(FRA) Hiring an Employee."

The PeopleSoft Currency Code table (CURRENCY\_CD\_TBL) contains sample currency code data. The Currency Code table is based on ISO Standard 4217, "Codes for the representation of currencies," and also relies on ISO country codes in the Country table (COUNTRY\_TBL). The navigation to the pages where you maintain currency code and country information depends on which PeopleSoft applications you are using. To access the pages for maintaining the Currency Code and Country tables, consult the online help for your applications for more information.

## Region and Industry Identifiers

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

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

### Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in the PeopleSoft Online Help:

- Asia Pacific
- Europe
- Latin America
- North America

### Industry Identifiers

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

- USF (U.S. Federal)

- E&G (Education and Government)

## Translations and Embedded Help

PeopleSoft 9.2 software applications include translated embedded help. With the 9.2 release, PeopleSoft aligns with the other Oracle applications by focusing our translation efforts on embedded help. We are not planning to translate our traditional online help and PeopleBooks documentation. Instead we offer very direct translated help at crucial spots within our application through our embedded help widgets. Additionally, we have a one-to-one mapping of application and help translations, meaning that the software and embedded help translation footprint is identical—something we were never able to accomplish in the past.

---

## Using and Managing the PeopleSoft Online Help

Select About This Help in the left navigation panel on any page in the PeopleSoft Online Help to see information on the following topics:

- Using the PeopleSoft Online Help.
- Managing hosted Online Help.
- Managing locally installed PeopleSoft Online Help.

---

## PeopleSoft HCM Related Links

[Oracle Help Center](#)

[PeopleSoft Online Help Home](#)

[PeopleSoft Information Portal](#)

[My Oracle Support](#)

[PeopleSoft Training from Oracle University](#)

[PeopleSoft Video Feature Overviews on YouTube](#)

[PeopleSoft Business Process Maps \(Microsoft Visio format\)](#)

[HCM Abbreviations](#)

[PeopleSoft Spotlight Series](#)

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## Contact Us

Send your suggestions to [pssoft-infodev\\_us@oracle.com](mailto:pssoft-infodev_us@oracle.com).

Please include the applications update image or PeopleTools release that you're using.

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# Getting Started with Monitor Health and Safety

---

## Monitor Health and Safety Overview

Monitor Health and Safety enables administrators to record and track incidents, injuries, illnesses, and dangerous occurrences at the workplace.

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

The system provides employees the ability to report incidents, vaccinations, test results, and allergies in Self-Service using Fluid tiles. For more information, see [Understanding Fluid Health and Safety](#).

---

## Monitor Health and Safety Business Processes

Monitor Health and Safety supports these business processes:

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

We cover these business processes in the business process topics in this product documentation.

## Monitor Health and Safety Integrations

Monitor Health and Safety integrates with all the PeopleSoft Human Capital Management (HCM) applications, with other PeopleSoft applications, and with third-party applications.

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

### Related Links

“PeopleSoft HCM Overview” (Application Fundamentals)

## Monitor Health and Safety Implementation

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

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

### Component Interfaces for Setup Components

This table lists the component interfaces that are delivered for setup components in Monitor Health and Safety:

| <b>Component</b>                                 | <b>Component Interface</b> | <b>References</b>                                                                                                              |
|--------------------------------------------------|----------------------------|--------------------------------------------------------------------------------------------------------------------------------|
| ACCIDN_TYPE_TBL<br>(Accident Type Table)         | ACCIDN_TYPE_TBL            | See <a href="#">Defining Injuries and Illnesses</a> .                                                                          |
| DIAGNOSIS_TABLE<br>(Diagnosis Table)             | DIAGNOSIS_TABLE            | See <a href="#">Diagnosis Table Page</a> or <a href="#">Diagnosis Page</a> or <a href="#">Diagnosis for Regulations Page</a> . |
| HS_OCC_ILLNESS<br>(Occupational Illnesses Table) | HS_OCC_ILLNESS             | See <a href="#">Occupational Illnesses Table Page</a> or <a href="#">Occupational Illnesses Page</a> .                         |
| HS_TRANSPORT_TBL<br>(Transport Table)            | HS_TRANSPORT_TBL           | See <a href="#">Transport Table Page</a> or <a href="#">Transportation Page</a> .                                              |

| <b>Component</b>                               | <b>Component Interface</b> | <b>References</b>                                                                          |
|------------------------------------------------|----------------------------|--------------------------------------------------------------------------------------------|
| INJURY_NATURE_TBL<br>(Nature Of Injury Table)  | INJURY_NATURE_TBL          | See <a href="#">Defining Injuries and Illnesses</a> .                                      |
| INJURY_SOURCE_TBL<br>(Source Of Injury Table)  | INJURY_SOURCE_TBL          | See <a href="#">Defining Injuries and Illnesses</a> .                                      |
| JOBCODE_HAZRDS_TBL<br>(Job Code Hazards Table) | JOBCODE_HAZRDS_TBL         | See <a href="#">Job Code Hazards Table Page</a> or <a href="#">Job Code Hazards Page</a> . |
| LOCATN_HAZRDS_TBL<br>(Location Hazards Table)  | LOCATN_HAZRDS_TBL          | See <a href="#">Location Hazards Table Page</a> or <a href="#">Location Hazards Page</a> . |

Refer to the *PeopleSoft HCM 9.2 - Reorganization of Component Interface Permissions* (Doc ID [2342162.1](#)) MOS posting for a list of system-delivered CIs and their usage, the mapping of CIs and associated permission lists, and the mapping of CI permission lists and user roles.

## Component Interfaces for Transaction Components

All setup data must already be loaded or entered into the system prior to using transaction component interfaces.

This table lists the component interfaces that are delivered for transaction components in Monitor Health and Safety:

| <b>Component</b>                                      | <b>Component Interface</b> | <b>References</b>                                                       |
|-------------------------------------------------------|----------------------------|-------------------------------------------------------------------------|
| HS_CLAIM_MGMT<br>(Open Claim)                         | CI_HS_CLAIM_MGMT           | See <a href="#">Managing Claims</a> .                                   |
| HS_INC_VEHICLE<br>(Vehicles/Equipment Involved)       | CI_HS_INC_VEHICLE          | See <a href="#">Entering Incident Data for Vehicles and Equipment</a> . |
| HS_INCIDENT<br>(Incident Details)                     | CI_HS_INCIDENT             | See <a href="#">Entering Health and Safety Incident Details</a> .       |
| HS_INCIDENT_ACTION<br>(Corrective/Preventive Actions) | CI_HS_INCIDENT_ACTION      | See <a href="#">Tracking Consequent Actions of Incidents</a> .          |

| <b>Component</b>                                       | <b>Component Interface</b> | <b>References</b>                                   |
|--------------------------------------------------------|----------------------------|-----------------------------------------------------|
| HS_INJ_ILL_REHAB<br>(Create Employee Rehab Plan)       | CI_HS_INJ_ILL_REHAB        | See <a href="#">Tracking Rehabilitation Plans</a> . |
| HS_INJURY_ILL<br>(Injury Details)                      | CI_HS_INJURY_ILL           | See <a href="#">Entering Injury Details</a> .       |
| HS_NE_INJILL_REHAB<br>(Create Non-Employee Rehab Plan) | CI_HS_NE_INJILL_REHAB      | See <a href="#">Tracking Rehabilitation Plans</a> . |
| HS_NE_PERS_DATA<br>Non-Employee Details                | CI_HS_NE_PERS_DATA         | See <a href="#">Entering Non-Employee Data</a> .    |

## Other Sources of Information

In the planning phase of the implementation, take advantage of all PeopleSoft sources of information, including the installation guides, table-loading sequences, data models, and business process maps.

See Also *PeopleTools: Setup Manager* and *PeopleTools: Component Interfaces*

## Chapter 2

# Setting Up Incident, Injury, and Illness Tracking

---

## Understanding Incident, Injury, and Illness Tracking

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

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

When you create information in these tables, enter effective dates that are before the effective dates of any incidents that you enter. Otherwise, all the valid codes do not appear in prompt lists on the Monitor Health and Safety pages.

### Related Links

“PeopleSoft HCM Overview” (Application Fundamentals)

---

## Defining Injuries and Illnesses

To define injury, illness, and accident codes, use the Accident Type Table (ACCIDN\_TYPE\_TBL), Accident Type BRA (ACCID\_TYPE\_TBL\_BRA), Accident Type eSocial BRA (ACCID\_TYPE\_ESO\_BRA), Body Part Table (BODY\_PART\_TABLE), Body Part BRA (BODY\_PART\_TBL\_BRA), Injury Nature Table (INJURY\_NATURE\_TBL), Nature of Injury BRA (INJURY\_NAT\_TBL\_BRA), Source of Injury Table (INJURY\_SOURCE\_TABLE), Unsafe Act Table (UNSAFE\_ACT\_TBL), Occupational Illness Table (HS\_OCC\_ILLNESS\_TBL), Occupational Illness Table - FRA (OCC\_ILLNESS), Diagnosis Table (DIAGNOSIS\_TABLE), Allergy Table (HS\_ALLERGY\_TBL), Immunization Table (HS\_IMMUN\_TBL), Medication Table (HS\_MEDCATN\_TBL), Medicare Table Australia (HS\_MEDCARE\_TBL\_AUS), and CID Codes BRA (CID\_CODES\_BRA) components.

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

## Pages Used to Define Injuries and Illnesses

| <b><i>Page Name</i></b>                          | <b><i>Definition Name</i></b> | <b><i>Usage</i></b>                                                                                                                                                                                                           |
|--------------------------------------------------|-------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Accident Type Table<br>or<br>Accident Types      | ACCIDENT_TYPE_TBL             | Describe the events that can result in physical occupational injuries.<br><br>Use the Accident Type codes that are used on the Injury Details page, standard codes, or company-specific codes.                                |
| <u>Accident Type BRA Page</u>                    | ACCID_TYPE_TBL_BRA            | (BRA) Describe the events that can result in physical occupational injuries.<br><br>These codes are used in the Injury Details BRA component.                                                                                 |
| <u>Accident Type eSocial BRA Page</u>            | ACCID_TYPE_ESO_BRA            | (BRA) Describe the events that can result in physical occupational injuries.<br><br>These codes are used in the Injury Details BRA component.                                                                                 |
| Body Part Table<br>or<br>Body Parts              | BODY_PART_TABLE               | Identify body parts that are subject to injury and associate each with a class.<br>For example, specify the <i>Jaw</i> as part of the class <i>Face</i> .                                                                     |
| Body Part BRA                                    | BODY_PART_TBL_BRA             | (BRA) Identify body parts that are subject to injury and associate each with a class. For example, specify the <i>Jaw</i> as part of the class <i>Face</i> .<br><br>Associate each body part with a legal code if applicable. |
| Nature Of Injury Table<br>or<br>Nature Of Injury | INJURY_NATURE_TBL             | Identify types of physical injuries. These codes are used in the Injury Details component.                                                                                                                                    |
| <u>Nature of Injury BRA Page</u>                 | INJURY_NAT_TBL_BRA            | (BRA) Identify types of physical injuries. These codes are used in the Injury Details BRA component.                                                                                                                          |
| Source of Injury Table<br>or<br>Source of Injury | INJURY_SOURCE_TBL             | Identify potential sources or causes of injury. These codes are used in the Injury Details component.                                                                                                                         |

| <b>Page Name</b>                                                                | <b>Definition Name</b> | <b>Usage</b>                                                                                                                                                                                       |
|---------------------------------------------------------------------------------|------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Source of Injury BRA                                                            | INJURY_SRCE_CD_BRA     | (BRA) Identify potential sources or causes of injury. These codes are used in the Injury Details BRA component.                                                                                    |
| Unsafe Act Table                                                                | UNSAFE_ACT_TABLE       | Assign codes to the causes of injuries and accidents and track incidents by associating an Unsafe Act code with the resulting Accident Type code. These codes are used on the Injury Details page. |
| <u>Occupational Illnesses Table Page or Occupational Illnesses Page</u>         | HS_OCC_ILLNESS         | Enter standard types of occupational illnesses.                                                                                                                                                    |
| Occupational Illness Tbl - FRA                                                  | OCC_ILLNESS_FRA        | (FRA) Enter standard types of occupational illnesses for France.                                                                                                                                   |
| <u>Diagnosis Table Page or Diagnosis Page or Diagnosis for Regulations Page</u> | DIAGNOSIS_TABLE        | Define standard medical diagnoses for injuries and illnesses. Track individual injuries and illnesses in the Incident Details and Rehabilitation Plans components.                                 |
| Allergy                                                                         | ALLERGY_TBL            | Define allergy types.                                                                                                                                                                              |
| Immunization                                                                    | IMMUN_TBL              | Define immunization types.                                                                                                                                                                         |
| Medication                                                                      | MEDCATN_TBL            | Define medication types.                                                                                                                                                                           |
| Medicare Item Details AUS                                                       | MEDICARE_TBL_AUS       | Define Medicare items.                                                                                                                                                                             |
| CID Codes BRA                                                                   | CID_CODES_BRA          | (BRA) Define international diseases codes for Brazil. These codes are entered for an injury incident on the Injury Details BRA - Details BRA page.                                                 |

## Understanding Injury and Illness Setup

Certain setup codes in the Monitor Health and Safety business process are entered by setID because they can vary by regulatory region. You can establish different sets of codes for each regulatory region in which you have operations.

For example, if you are administering a U.S. workforce, you may choose to use the standard codes the American National Standards Institute (ANSI) has established, or establish new ones. Use the codes required by local authorities in a regulatory region, if a specific set of codes is required.

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

Accident Type BRA Page

Use the Accident Type BRA page (ACCID\_TYPE\_TBL\_BRA) to describe the events that can result in physical occupational injuries.

Navigation:

Set Up HCM > Product Related > Workforce Monitoring > Health and Safety > Accident Type BRA > Accident Type BRA

This example illustrates the fields and controls on the Accident Type BRA page.

Accident Type BRA

Set ID

BRA

Accident Type

33567

Accident Type

1 of 1

View All

\*Effective Date

01/01/2016

\*Status

Active

+

-

\*Description

Back Injury

Short Description

Back Inj

Accident Type Legal Code

100033567

Accident type codes defined on this page are used on the Details page of the Injury Details BRA component to classify accident types of reported injuries.

| Field or Control         | Description                                                                     |
|--------------------------|---------------------------------------------------------------------------------|
| Accident Type Legal Code | This code (9 characters in length) is used in eSocial reporting (S-2210 event). |

Accident Type eSocial BRA Page

Use the Accident Type eSocial BRA page (ACCID\_TYPE\_ESO\_BRA) to define types of work accidents.

Navigation:

Set Up HCM > Product Related > Workforce Monitoring > Health and Safety > Accident Type eSocial BRA > Accident Type eSocial BRA



This example illustrates the fields and controls on the Accident Type eSocial BRA page.

**Accident Type eSocial BRA**

eSocial Accident Tp 1.0.01

Accident Type

1 of 1

View All

\*Effective Date

01/01/2002

\*Status

Active

+

-

Description

Bodily injury

Long Description

Bodily injury that causes death or the loss or reduction, permanent or temporary, of the ability to work, provided it is not covered by any of the other codes.

Accident type eSocial codes defined on the Accident Type eSocial BRA page are used on the [Injury Details - Details BRA Page](#) to specify the types of work accidents that are being reported.

| Field or Control                            | Description                                                 |
|---------------------------------------------|-------------------------------------------------------------|
| eSocial Accident Tp (eSocial accident type) | Enter an accident type identifier (6 characters in length). |

Nature of Injury BRA Page

Use the Nature of Injury BRA page (INJURY\_NAT\_TBL\_BRA) to identify natures of physical injuries.

Navigation:

Set Up HCM > Product Related > Workforce Monitoring > Health and Safety > Nature of Injury BRA > Nature of Injury BRA

This example illustrates the fields and controls on the Nature of Injury BRA page.

**Nature of Injury BRA**

Set ID BRA Nature of Injury 00020

Nature Of Injury

1 of 1

View All

\*Effective Date

01/01/2016

\*Status

Active

+

-

\*Description

Chest (Including Internal Organs)

Short Description

Chest

Nature of Injury Legal Code

756030000

Injury codes defined on this page are used on the Details page of the Injury Details BRA component to describe natures of the injuries.

| <i><b>Field or Control</b></i>     | <i><b>Description</b></i>                              |
|------------------------------------|--------------------------------------------------------|
| <b>Nature of Injury Legal Code</b> | This code is used in eSocial reporting (S-2210 event). |

## Related Links

### Entering Injury Details

## Occupational Illnesses Table Page or Occupational Illnesses Page

Use the Occupational Illnesses Table (or Occupational Illnesses) page (HS\_OCC\_ILLNESS) to enter standard types of occupational illnesses.

Navigation:

- **Set Up HCM > Product Related > Workforce Monitoring > Health and Safety > Occupational Illnesses Table > Occupational Illnesses Table**
- **Workforce Monitoring > Health and Safety > Define Medical Services > Occupational Illnesses > Occupational Illnesses**

This example illustrates the fields and controls on the Occupational Illnesses Table page. You can find definitions for the fields and controls later on this page.

### Occupational Illnesses Table

Set ID   GBR   Occupational Illness   K48

**Occupational Illness Data**
🔍
|
⏪
⏩
1 of 1
⏪
⏩
|
[View All](#)

\*Effective Date

01/01/1980 

\*Status

Active 

+ 

- 

\*Description

Chickenpox

Description

Chickenpox.

Additionally reportable in respect of offshore workplaces.


[Germany](#)

Disease Class

KDA 

Contagious

| <i><b>Field or Control</b></i> | <i><b>Description</b></i>                                                                          |
|--------------------------------|----------------------------------------------------------------------------------------------------|
| <b>Occupational Illness</b>    | You can enter different groups of occupational illness codes (maximum of 6 digits) for each setID. |

**(DEU) Germany**

| <b>Field or Control</b> | <b>Description</b>                                                                                                                                                                                                                  |
|-------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Disease Class</b>    | <p>Select a class from the Disease Class Table DEU, if appropriate.</p> <p>If the disease class that you want to select is not in the list of valid values, then add it into the system using the Disease Class Table DEU page.</p> |

**Diagnosis Table Page or Diagnosis Page or Diagnosis for Regulations Page**

Use the Diagnosis Table (or Diagnosis or Diagnosis for Regulations) page (DIAGNOSIS\_TABLE) to define standard medical diagnoses for injuries and illnesses.

Track individual injuries and illnesses in the Incident Details and Rehabilitation Plans components.

Navigation:

- **Set Up HCM > Product Related > Workforce Monitoring > Health and Safety > Diagnosis Table > Diagnosis Table**
- **Workforce Monitoring > Health and Safety > Define Medical Services > Diagnosis > Diagnosis**
- **Workforce Monitoring > Meet Regulatory Rqmts > Define Regulatory Rqmts Data > Diagnosis for Regulations > Diagnosis for Regulations**

This example illustrates the fields and controls on the Diagnosis Table page. You can find definitions for the fields and controls later on this page.

**Diagnosis Table**

Set ID   GBR      Diagnosis Code   K00001

Diagnosis

| << < 1 of 1 > >> View All

\*Effective Date   01/01/1980

\*Status   Active

+   -

\*Description   Lacerations

Short Description   Laceration

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

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

(USA) If the organization is implementing the Americans with Disabilities Act (ADA) feature of HR, use the Diagnosis page to enter medical diagnoses for disabilities as well. This page appears in the Meet Regulatory Rqmts menu. You can use the page in either menu; it is the same.

| <b>Field or Control</b> | <b>Description</b>                                                                  |
|-------------------------|-------------------------------------------------------------------------------------|
| <b>Diagnosis Code</b>   | Select a value. You can define a different group of diagnosis codes for each setID. |

## Defining Dangerous Occurrences and Hazardous Conditions

To define dangerous occurrences and hazardous conditions, use the Dangerous Occurrences Table (HS\_DANGER\_OCC), Hazardous Materials Data or Hazardous Conditions/Materials (HAZ\_CON\_MATRL\_TBL), Job Code Hazards Table (JOB\_CODE\_HAZRDS\_TBL), Location Hazards Table (LOCATN\_HAZRDS\_TBL), Hazard Units BRA (HAZ\_UNITS\_BRA), Hazard Concepts BRA (HAZ\_CONCEPT\_BRA), and Work Hazards BRA (HAZARD\_TBL\_BRA) components.

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

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

This section discusses how to define dangerous occurrences and hazardous conditions.

## Pages Used to Define Dangerous Occurrences and Hazards

| <b>Page Name</b>                                                                           | <b>Definition Name</b> | <b>Usage</b>                                                                                                                                                                                                                                             |
|--------------------------------------------------------------------------------------------|------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <a href="#"><u>Dangerous Occurrences Table Page or Dangerous Occurrences Page</u></a>      | HS_DANGER_OCC          | Define types of dangerous occurrences or specify those that are defined by the regulatory authority in the regulatory region. Use the codes that you define when you create a health and safety incident, using the Incident Details - Description page. |
| <a href="#"><u>Hazardous Materials Data Page or Hazardous Condition/Materials Page</u></a> | HAZ_CON_MATRL_TBL      | Define codes for physical conditions and hazardous materials that might directly contribute to occupational accidents, injuries, or illnesses. The codes that you define are used on the Corrective Actions and Preventive Actions pages.                |

| <b><i>Page Name</i></b>                                     | <b><i>Definition Name</i></b> | <b><i>Usage</i></b>                                                                         |
|-------------------------------------------------------------|-------------------------------|---------------------------------------------------------------------------------------------|
| <u>Job Code Hazards Table Page or Job Code Hazards Page</u> | JOBCODE_HAZRDS_TBL            | Track exposure to hazards experienced by employees in a particular job code.                |
| <u>Location Hazards Table Page or Location Hazards Page</u> | LOCATN_HAZRDS_TBL             | Identify exposures to hazards that have occurred at specific locations in the organization. |
| <u>Hazard Units BRA Page</u>                                | HAZ_UNITS_BRA                 | (BRA) Define hazard units.                                                                  |
| <u>Hazard Concepts BRA Page</u>                             | HAZ_CONCEPT_BRA               | (BRA) Define hazard concepts.                                                               |
| <u>Work Hazards BRA Page</u>                                | HAZARD_TBL_BRA                | (BRA) Define codes for occupational accidents, injuries, or illnesses.                      |
| <u>Risk Questions BRA Page</u>                              | RISK_QUESTIONS_BRA            | (BRA) Perform risk evaluation for work hazards.                                             |

## Dangerous Occurrences Table Page or Dangerous Occurrences Page

Use the Dangerous Occurrences Table (or Dangerous Occurrences) page (HS\_DANGER\_OCC) to define types of dangerous occurrences or specify those that are defined by the regulatory authority in the regulatory region.

Use the codes that you define when you create a health and safety incident, using the Incident Details - Description page.

Navigation:

- **Set Up HCM > Product Related > Workforce Monitoring > Health and Safety > Dangerous Occurrences Table > Dangerous Occurrences Table**
- **Workforce Monitoring > Health and Safety > Define Hazardous Environments > Dangerous Occurrences > Dangerous Occurrences**

This example illustrates the fields and controls on the Dangerous Occurrences Table page. You can find definitions for the fields and controls later on this page.

**Dangerous Occurrences Table**

Set ID CAN Dangerous Occurrence 30

**Details** [Search] | [Navigation] 1 of 1 [View All]

\*Effective Date 01/01/1980 [Calendar] \*Status Active [Dropdown] [+ -]

Description BLASTING ACCIDENT

Short Description BLASTING

Comments BLASTING ACCIDENT [Text Area]

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

## Hazardous Materials Data Page or Hazardous Condition/Materials Page

Use the Hazardous Materials Data (or Hazardous Condition/Materials) page (HAZ\_CON\_MATRL\_TBL) to define codes for physical conditions and hazardous materials that might directly contribute to occupational accidents, injuries, or illnesses.

The codes that you define are used on the Corrective Actions and Preventive Actions pages.

Navigation:

- **Set Up HCM > Product Related > Workforce Monitoring > Health and Safety > Hazardous Materials Data > Hazardous Materials Data**
- **Workforce Monitoring > Health and Safety > Define Hazardous Environments > Hazardous Conditions/Materials > Hazardous Conditions/Materials**

This example illustrates the fields and controls on the Hazardous Materials Data page. You can find definitions for the fields and controls later on this page.

## Hazardous Materials Data

Set ID    USA
                
Hazard ID    K900

Hazard Details

Q

|

◀

◀

1 of 1

▼

▶

▶

|

View All

\*Effective Date

01/01/1980

📅

\*Status

Active

▼

+

-

\*Description

Asbestos

Short Description

Asbestos

Hazard Type

☐ Condition
☒ Material

Materials Data

Hazardous Class

Poisonous and Infectious

▼

Hazardous Division

Immediate and Seriously Toxic

▼

| <i><b>Field or Control</b></i> | <i><b>Description</b></i>                                                                                                                                                                                         |
|--------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Hazard ID</b>               | You can enter multiple hazard IDs for each setID and maintain different sets of hazard IDs for specific regulatory regions.                                                                                       |
| <b>Hazard Type</b>             | Indicate whether the hazard type is <b>Condition</b> or <b>Material</b> . If you select Material, the <b>Materials Data</b> group box is available for you to specify the hazardous class and hazardous division. |

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

**Job Code Hazards Table Page or Job Code Hazards Page**

Use the Job Code Hazards Table (or Job Code Hazards) page (JOBCODE\_HAZRDS\_TBL) to track exposure to hazards experienced by employees in a particular job code.

Navigation:

- **Set Up HCM > Product Related > Workforce Monitoring > Health and Safety > Job Code Hazards Table > Job Code Hazards Table**
- **Workforce Monitoring > Health and Safety > Define Hazardous Environments > Job Code Hazards > Job Code Hazards**

This example illustrates the fields and controls on the Job Code Hazards Table page. You can find definitions for the fields and controls later on this page.

**Job Code Hazards Table**

Set ID: SHARE Table Set shared across Corp  
Job Code: 740010 Radiologist-Heart Research

**Hazard Details**

1-1 of 1 | View All

| Reg Region | Hazard ID | Short Description | Date Reported | Date Removed | Hazard Type | Hazardous Class          | Hazardous Division            |
|------------|-----------|-------------------|---------------|--------------|-------------|--------------------------|-------------------------------|
| USA        | K570      | Unshielded        | 05/20/2020    |              | Condition   | Poisonous and Infectious | Immediate and Seriously Toxic |

| Field or Control                      | Description                                                                                                                                                                                                                            |
|---------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Job Code</b>                       | Because the job code is tied to the set ID, you can maintain different hazard data for the same job code in different regulatory regions.                                                                                              |
| <b>Reg Region</b> (regulatory region) | Enter the regulatory region for the hazard.                                                                                                                                                                                            |
| <b>Hazard ID</b>                      | Add data rows to associate multiple hazard IDs with each job code. When you enter a hazard ID, the system populates the <b>Short Description</b> , <b>Hazard Type</b> , <b>Hazardous Class</b> , and <b>Hazardous Division</b> fields. |
| <b>Date Reported</b>                  | This is usually today's date, which you can change.                                                                                                                                                                                    |
| <b>Date Removed</b>                   | Enter the date when job conditions were changed.                                                                                                                                                                                       |

**Note:** Define hazardous conditions and materials on the [Hazardous Materials Data Page](#) or [Hazardous Condition/Materials Page](#).

## Location Hazards Table Page or Location Hazards Page

Use the Location Hazards Table (or Location Hazards) page (LOCATN\_HAZRDS\_TBL) to identify exposures to hazards that have occurred at specific locations in the organization.

Navigation:

- Set Up HCM > Product Related > Workforce Monitoring > Health and Safety > Location Hazards Table > Location Hazards Table
- Workforce Monitoring > Health and Safety > Define Hazardous Environments > Location Hazards > Location Hazards



This example illustrates the fields and controls on the Location Hazards Table page. You can find definitions for the fields and controls later on this page.

Location Hazards Table

Set ID

SHARE

Table Set shared across Corp

Location Code

KUMA00

Massachusetts Operations

Hazard Details

1-1 of 1

View All

| Reg Region | *Hazard ID | Short Description | *Date Reported | Date Removed | Hazard Type | Hazardous Class          | Hazardous Division            |   |   |
|------------|------------|-------------------|----------------|--------------|-------------|--------------------------|-------------------------------|---|---|
| USA        | K900       | Asbestos          | 05/20/2020     |              | Material    | Poisonous and Infectious | Immediate and Seriously Toxic | + | - |

| Field or Control               | Description                                                                                                                                                                                    |
|--------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Location Code                  | The location code that you entered appears in this field.                                                                                                                                      |
| Reg Region (regulatory region) | Enter the regulatory region for the hazard. Because the location code is tied to the setID, you can maintain different hazard data for the same location code in different regulatory regions. |
| Hazard ID                      | You can add data rows to associate multiple hazard IDs with each location. When you enter a hazard ID, the system populates the <b>Hazard Type</b> field.                                      |
| Date Reported                  | This is usually today's date, which you can change.                                                                                                                                            |
| Date Removed                   | Enter the date when location conditions were changed.                                                                                                                                          |

**Note:** Define hazardous conditions and materials in the [Hazardous Materials Data Page or Hazardous Condition/Materials Page](#).

## Hazard Units BRA Page

Use the Hazard Units BRA page (HAZ\_UNITS\_BRA) to define hazard units.

Navigation:

**Workforce Monitoring > Health and Safety > Define Hazardous Environments > Hazard Units BRA > Hazard Units BRA**

This example illustrates the fields and controls on the Hazard Units BRA page.

**Hazard Units BRA**

Hazard Unit 02

**Unit Details** 1 of 1 View All

\*Effective Date 01/01/2002 + -

\*Status Active ▼

Measure Unit Decibel linear (dB (linear))

Short Name DB (linear)

Hazard units are prepopulated to the HCM system. They are used when you define work hazards on the [Work Hazards BRA Page](#).

## Hazard Concepts BRA Page

Use the Hazard Concepts BRA page (HAZ\_CONCEPT\_BRA) to define hazard concepts.

Navigation:

**Workforce Monitoring > Health and Safety > Define Hazardous Environments > Hazard Concepts BRA > Hazard Concepts BRA**

This example illustrates the fields and controls on the Hazard Concepts BRA page.

**Hazard Concepts BRA**

Hazard Concept HC00000001

**Concept Details** 1 of 1 View All

\*Effective Date 01/01/2002 + -

\*Effective Status Active ▼

**Information Details** 1-2 of 2

|   | *Sequence | *Concept Type          | *Concept Short Name | *Status               |                |                |
|---|-----------|------------------------|---------------------|-----------------------|----------------|----------------|
| 1 | 1         | HC001 CONCEPT TYPE 011 | HC SH 11            | Active <span>▼</span> | <span>+</span> | <span>-</span> |
| 2 | 2         | HC001 CONCEPT TYPE 012 | HC SH 12            | Active <span>▼</span> | <span>+</span> | <span>-</span> |

Hazard concepts are used when you define work hazards on the [Work Hazards BRA Page](#).

## Work Hazards BRA Page

Use the Work Hazards BRA page (HAZARD\_TBL\_BRA) to define codes for occupational accidents, injuries, or illnesses.

Navigation:

**Workforce Monitoring > Health and Safety > Define Hazardous Environments > Work Hazards BRA > Work Hazards BRA**

This example illustrates the fields and controls on the Work Hazards BRA page.

Work Hazards BRA

Risk Questions BRA

Set ID

KRSI1

Hazard ID

KR001

Hazard Details

Q

|

◀

▶

1 of 1

▶

▶

View All

\*Effective Date

01/01/2002

📅

\*Status

Active

▼

+

−

\*Description

MECHANICAL WORKSHOP

Short Description

MECHANICAL

Hazard Agent Code

🔍

Hazard Factor

Hazard Source

Hazard Trajectory

Hazard Evaluation Type

\*Evaluation Type

Quantitative

▼

Hazard Unit

03

🔍

Decibel (C) (dB(C))

Number of Units

74341.00000

Tolerance Limit

122356.00000

Technique Used

AUDIOMETRIC

Enter attributes about the work hazard you are defining, such as type, factor, evaluation type, and so on.

| Field or Control  | Description                                       |
|-------------------|---------------------------------------------------|
| Hazard Agent Code | Select the hazard agent code for the work hazard. |

Hazard Evaluation Type

| Field or Control | Description                                                                                |
|------------------|--------------------------------------------------------------------------------------------|
| Evaluation Type  | Select an evaluation type for the work hazard, <i>Qualitative</i> or <i>Quantitative</i> . |

| <b>Field or Control</b>           | <b>Description</b>                                                                                                                                                                                                                       |
|-----------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Hazard Unit</b>                | <p>Select a unit of measure for the work hazard. This field appears if the evaluation type is <i>Quantitative</i>.</p> <p>Hazard units are defined on the <a href="#">Hazard Units BRA Page</a>.</p>                                     |
| <b>Number of Units</b>            | <p>Enter the unit number (for example, 30) of the work hazard that employees are exposed to. This field appears if the evaluation type is <i>Quantitative</i>.</p>                                                                       |
| <b>Tolerance Limit</b>            | <p>Enter worker's highest acceptable limit (for example, 37) of the work hazard.</p>                                                                                                                                                     |
| <b>Technique Used</b>             | <p>Enter the technique used to measure the work hazard. This field appears if the evaluation type is <i>Quantitative</i>.</p>                                                                                                            |
| <b>Hazard Concept and Concept</b> | <p>Specify the applicable hazard concept and concept type for the work hazard. These fields appear if the evaluation type is <i>Qualitative</i>.</p> <p>Hazard concepts are defined on the <a href="#">Hazard Concepts BRA Page</a>.</p> |

## Risk Questions BRA Page

Use the Risk Questions BRA page (RISK\_QUESTIONS\_BRA) to perform risk evaluation for work hazards.

Navigation:

**Workforce Monitoring > Health and Safety > Define Hazardous Environments > Work Hazards BRA > Risk Questions BRA**

This example illustrates the fields and controls on the Risk Questions BRA page.

Work Hazards BRA

Risk Questions BRA

Set ID   KRSI1                      Hazard ID   KR001

Additional Information

Effective Date   01/01/2002

Does exposure to the risk factor / execution of the activity constitute unhealthy work?                      \*   Yes

Does the exposure to the risk / activity factor constitute dangerous work?                      \*   Yes

Does the exposure to the risk factor / execution of the activity require collection for special retirement purposes?                      \*   Yes

## Defining Work-Related Incident Details

To define related incident details, use the Animal Table (HS\_ANIMAL\_TBL) and the Transport Table (HS\_TRANSPORT\_TBL) components.

This section discusses how to define work-related incident details.

### Pages Used to Define Related Incident Details

| Page Name                                                   | Definition Name  | Usage                                                                                                                                                                                        |
|-------------------------------------------------------------|------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <a href="#">Animal Table Page or Animals Involved Page</a>  | HS_ANIMAL_TBL    | Identify the types of animals involved in incidents. This data is used in the Incident Details - Travel page.                                                                                |
| <a href="#">Transport Table Page or Transportation Page</a> | HS_TRANSPORT_TBL | Identify the modes of transportation used by employees during incidents that occur during work-related travel.<br><br>You use Mode of Transport codes on the Incident Details - Travel page. |

## Understanding Work-Related Incident Details

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

### Company Property

Use the Company Property Table (COMPANY\_PROP\_TBL) component to track health and safety incidents that involve heavy equipment, machinery, and computer and electronic equipment. To access the Company Property Table, select **Set Up HCM > Product Related > Workforce**

**Administration > Setup Company Property** The pages in the Company Property component are used to manage company assets in addition to tracking issues involving company property.

## Company Cars

You can link cars that are set up in Company Cars to incidents. If you add a company-owned vehicle, you can also access the registration and descriptive data that is entered for the vehicle on the Car Data page.

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

## Related Links

“Handling Company Property” (PeopleSoft Human Resources Administer Workforce)

“Setting Up Company Car Fleet Information” (PeopleSoft Human Resources Administer Company Cars)

## Animal Table Page or Animals Involved Page

Use the Animal Table (or Animals Involved) page (HS\_ANIMAL\_TBL) to identify the types of animals involved in incidents.

This data is used in the Incident Details - Travel page.

Navigation:

- **Set Up HCM > Product Related > Workforce Monitoring > Health and Safety > Animal Table > Animal Table**
- **Workforce Monitoring > Health and Safety > Define Accident/Injury Info > Animals Involved > Animals Involved**

This example illustrates the fields and controls on the Animal Table page. You can find definitions for the fields and controls later on this page.

| Animal Table                                                                                                                                                            |         |              |                   |          |   |          |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------|--------------|-------------------|----------|---|----------|
| Animal Details                                                                                                                                                          |         |              |                   |          |   |          |
|   |         |              |                   | 1-6 of 6 |   | View All |
|                                                                                                                                                                         | *Animal | *Description | Short Description |          |   |          |
| 1                                                                                                                                                                       | K00001  | Bear         | Bear              | +        | - |          |
| 2                                                                                                                                                                       | K00002  | Moose        | Moose             | +        | - |          |
| 3                                                                                                                                                                       | K00003  | Skunk        | Skunk             | +        | - |          |
| 4                                                                                                                                                                       | K00004  | Dog          | Dog               | +        | - |          |
| 5                                                                                                                                                                       | K00005  | Cat          | Cat               | +        | - |          |
| 6                                                                                                                                                                       | K00006  | Bird         | Bird              | +        | - |          |

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

## Transport Table Page or Transportation Page

Use the Transport Table page (HS\_TRANSPORT\_TBL) to identify the modes of transportation used by employees during incidents that occur during work-related travel.

You use Mode of Transport codes on the Incident Details - Travel page.

Navigation:

- **Set Up HCM > Product Related > Workforce Monitoring > Health and Safety > Transport Table > Transport Table**
- **Workforce Monitoring > Health and Safety > Define Accident/Injury Info > Transportation > Transportation**

This example illustrates the fields and controls on the Transport Table page. You can find definitions for the fields and controls later on this page.

| Transport Table                                                                                                                                                     |                    |                        |                   |           |   |          |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------|------------------------|-------------------|-----------|---|----------|
| Details                                                                                                                                                             |                    |                        |                   |           |   |          |
|   |                    |                        |                   | 1-7 of 18 |   | View All |
|                                                                                                                                                                     | *Mode Of Transport | Description            | Short Description |           |   |          |
| 1                                                                                                                                                                   | K00001             | Airplane               | Airplane          | +         | - |          |
| 2                                                                                                                                                                   | K00002             | Automobile-Company Car | Auto-Cmpny        | +         | - |          |
| 3                                                                                                                                                                   | K00003             | Automobile-Personal    | Auto-Prsnl        | +         | - |          |
| 4                                                                                                                                                                   | K00004             | Automobile-Rental      | Auto-Rentl        | +         | - |          |
| 5                                                                                                                                                                   | K00005             | Bicycle                | Bicycle           | +         | - |          |
| 6                                                                                                                                                                   | K00006             | Big Rig                | Big Rig           | +         | - |          |
| 7                                                                                                                                                                   | K00007             | Bus                    | Bus               | +         | - |          |

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

## (IND) Setting Up Disablement Types

To set up disablement types, use the Disablement Type (HS\_DISABL\_TYPE\_IND) component.

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

Page Used to Set Up Disablement Types

| Page Name                                 | Definition Name    | Usage                     |
|-------------------------------------------|--------------------|---------------------------|
| <a href="#">Disablement Type IND Page</a> | HS_DISABL_TYPE_IND | Define disablement types. |

Disablement Type IND Page

Use the Disablement Type IND page (HS\_DISABL\_TYPE\_IND) to define disablement types.

Navigation:

Set Up HCM > Product Related > Workforce Monitoring > Health and Safety > Disablement Type IND > Disablement Type IND

This example illustrates the fields and controls on the Disablement Type IND page. You can find definitions for the fields and controls later on this page.

Disablement Type IND

Injury Type

Partial

Disablement Code

K03

Disablement Details

Q

|

1 of 1

▼

▶

|

View All

Effective Date

01/01/2000

\*Status

Active

▼

+

−

Description

Loss of thumb

Short Description

Loss-thumb

Pct Loss of Earnings

30

Long Description

Loss of thumb

| Field or Control                                | Description                                                                                                                    |
|-------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------|
| Injury Type                                     | Select an injury type: <i>Partial</i> or <i>Total</i> to access this page. The injury type you selected appears in this field. |
| Disablement Code                                | The disablement code that you entered to access this page appears in this field.                                               |
| Pct Loss of Earnings (percent loss of earnings) | Enter the percentage of loss of earnings due to the disablement.                                                               |



## Defining Medical Services Information

To define medical services information, use the Medical Facilities Table (HS\_MEDICAL\_FAC), Laboratory Provider BRA (LAB\_PROVID\_BRA), Laboratory Exams BRA (MED\_TESTS\_DET\_BRA) and the Physician Table (HS\_PHYSICIAN\_DATA) components.

This section discusses how to enter information for physicians and medical facilities.

### Pages Used to Define Medical Services Information

| <b><i>Page Name</i></b>                                                                  | <b><i>Definition Name</i></b> | <b><i>Usage</i></b>                                                                                                    |
|------------------------------------------------------------------------------------------|-------------------------------|------------------------------------------------------------------------------------------------------------------------|
| Medical Facilities Table<br>or<br>Medical Facilities                                     | HS_MEDICAL_FAC                | Enter hospitals and clinics and their addresses.                                                                       |
| <u>Laboratory Provider Page</u>                                                          | LAB_PROVID_BRA                | (BRA) Enter basic contact information for medical laboratories.                                                        |
| <u>Physician Table - Name Page</u>                                                       | HS_PHYSICIAN_DATA1            | Enter doctors and other medical specialists to the Physician Table.                                                    |
| Edit Name                                                                                | NAME_DFT_SEC                  | Enter name details such as prefix, first name, last name, and so on.                                                   |
| Physician Table - Address<br>or<br>Physicians - Address<br>or<br>Physician BRA - Address | HS_PHYSICIAN_DATA2            | Enter addresses for doctors and other medical specialists.                                                             |
| <u>Medical Register Page</u>                                                             | HS_PHYSICIAN_BRA              | (BRA) Specify organ statutory information for physicians.                                                              |
| <u>Laboratory Exams BRA Page</u>                                                         | MED_TESTS_DET_BRA             | (BRA) Define laboratory exams.                                                                                         |
| Chemical Agent Code BRA Page                                                             | BIOL_MONIT_BRA                | (BRA) Define chemical agent codes for use in exam results.<br><br>See Also <u>Biological Monitor Result BRA Page</u> . |

## Laboratory Provider Page

Use the Laboratory Provider page (LAB\_PROVIDER\_BRA) to enter basic contact information for medical laboratories.

Navigation:

**Set Up HCM > Product Related > Workforce Monitoring > Health and Safety > Laboratory Provider BRA > Laboratory Provider**

This example illustrates the fields and controls on the Laboratory Provider page.

Use this page to store basic contact information of laboratories that can perform medical tests (for example, drug tests) for workers.

| <i><b>Field or Control</b></i> | <i><b>Description</b></i>                           |
|--------------------------------|-----------------------------------------------------|
| <b>CNPJ Number</b>             | (Required) Enter the CNPJ number of the laboratory. |

### Related Links

“Understanding the CAGED Report” (PeopleSoft Human Resources Administer Workforce)

## Physician Table - Name Page

Use the Physician Table - Name page (HS\_PHYSICIAN\_DATA1) to enter doctors and other medical specialists to the Physician Table.

Navigation:

- **Set Up HCM > Product Related > Workforce Monitoring > Health and Safety > Physician Table > Name**
- **Set Up HCM > Product Related > Workforce Monitoring > Health and Safety > Physician BRA > Name**

- **Workforce Monitoring > Health and Safety > Define Medical Services > Physicians > Name**

This example illustrates the fields and controls on the Physician Table - Name page. You can find definitions for the fields and controls later on this page.

NameAddress

Physician ID00000000001

\*Name FormatEnglishEdit Name

Display NameHenry Gerald

| Field or Control | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Physician ID     | <p>The non-employee ID that is assigned to the physician appears in this field.</p> <p>If you choose to have the system automatically assign non-employee IDs, it assigns to the physician the number that immediately follows the one in the Last Non-Employee ID Assigned field in the Installation Table. The number first appears as 00000000000. The actual number appears after you save the information here. The system uses the same number sequence to assign non-employee IDs on both the Administer Training and Monitor Health and Safety pages.</p> <p><b>Warning!</b> To avoid maintaining two different sets of non-employee IDs, PeopleSoft recommends that you either always assign numbers manually or always let the system do it.</p> |
| Name Format      | Select the country whose name format you want to use for this person. The appropriate fields for the country that you enter appear on the Edit Name page.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| Edit Name        | Click this link to access the Edit Name page on which you enter name details in the appropriate country format.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |

Related Links

[Entering Non-Employee Data](#)  
“Setting Up Implementation Defaults” (Application Fundamentals)

Medical Register Page

Use the Medical Register page (HS\_PHYSICIAN\_BRA) to specify organ statutory information for physicians.

Navigation:

## Set Up HCM > Product Related > Workforce Monitoring > Health and Safety > Physician BRA > Medical Register

This example illustrates the fields and controls on the Medical Register page. You can find definitions for the fields and controls later on this page.

| Name                    | Address     | Medical Register                           |
|-------------------------|-------------|--------------------------------------------|
| Physician ID            | 00000002401 | Pitangui,Rafael Chalita                    |
| <b>Medical Register</b> |             |                                            |
| *Organ Statutory        | CRM         | <input type="checkbox"/> PCMSO Coordinator |
| *Register Number        |             |                                            |
| Country                 | BRA         | Brazil                                     |
| *State                  | SP          | Sao Paulo                                  |
| NIS/PIS                 |             |                                            |
| CPF National ID         |             |                                            |

Data on this page is used in eSocial reporting. When a physician is referenced on the Absence Event BRA - “Absence Entry Page” (PeopleSoft Global Payroll for Brazil) for employees requesting absence, the system populates that page with information that is specified here on the Medical Register page.

Additionally, data on this page is also used on the [Injury Details - Diagnoses Page](#) (for filling Communication Accident Work reports) and the ASO Exam Results BRA component (for identifying occupational physicians).

| Field or Control         | Description                                                                                                                                                                                        |
|--------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Organ Statutory</b>   | Select <i>CRM</i> , <i>CRO</i> , or <i>RMS</i> as the organ statutory.                                                                                                                             |
| <b>PCMSO Coordinator</b> | Select to make the physician a PCMSO coordinator. Only physicians with this option can be selected as PCMSO coordinators for ASO exams on the <a href="#">Biological Monitor Result BRA Page</a> . |
| <b>Register Number</b>   | Enter the valid register number of the selected organ statutory.                                                                                                                                   |
| <b>Country and State</b> | Enter the country (BRA) and state where the physician’s organ statutory was issued.<br><br>A state is required if the selected organ statutory is <i>CRM</i> or <i>CRO</i> .                       |

| <b>Field or Control</b> | <b>Description</b>                                  |
|-------------------------|-----------------------------------------------------|
| <b>NIS/PIS</b>          | Enter the valid PIS or NIS number of the physician. |
| <b>CPF National ID</b>  | Enter the valid CPF number of the physician.        |

## Laboratory Exams BRA Page

Use the Laboratory Exams BRA page (MED\_TESTS\_DET\_BRA) to define laboratory exams.

Navigation:

**Set Up HCM > Product Related > Workforce Monitoring > Health and Safety > Laboratory Exams BRA > Laboratory Exams BRA**

This example illustrates the fields and controls on the Laboratory Exams BRA page.

**Laboratory Exams BRA**

Laboratory Exam Code KR0001

Laboratory Exam Details

1 of 1

View All

\*Effective Date
01/01/2002

\*Effective Status
Active

+

-

\*Description
Hemograma

Short Description
Hemograma

eSocial Code
0197

Blood aniline

Use this page to define laboratory exam codes, which are used for tracking employees' medical exams on the [ASO Exam Results BRA Page](#).

| <b>Field or Control</b> | <b>Description</b>                                                                                                                                                                         |
|-------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>eSocial Code</b>     | <p>Select an eSocial code to associate with the laboratory exam.</p> <p>eSocial codes are defined one the “eSocial Diagnostic Procedures Page” (PeopleSoft Global Payroll for Brazil).</p> |

## Defining Work Restrictions and Modified Work Duties

To define work restrictions and modified work duties, use the Work Restrictions Table (WORK\_RESTRICT\_TBL) and the Modified Work Table (MODIFIED\_WORK\_TBL) components.

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

## Pages Used to Define Work Restrictions and Duties

| <b>Page Name</b>                                           | <b>Definition Name</b> | <b>Usage</b>                                                                                              |
|------------------------------------------------------------|------------------------|-----------------------------------------------------------------------------------------------------------|
| Work Restrictions Table<br>or<br>Codes and Effective Dates | WORK_RESTRICT_TBL      | Identify physical limitations or restrictions placed on individuals as a result of injuries or illnesses. |
| Modified Work                                              | MODIFIED_WORK_TBL      | Identify changes and modifications to processes or methods of doing a job.                                |

## (BRA) Defining Work Environments and Conditions

To define work environments and conditions for workers, use the Workplace BRA (WORKPLACE\_BRA), Protection Equipment BRA (PROT\_EQUIPMENT\_BRA), Environment Responsible BRA (HA\_RESPONSIBLE\_BRA), and Worker Conditions BRA (WORKER\_ENVIRON\_BRA) components.

This topic discusses how to define work environments and conditions.

## Pages Used to Define Work Environments and Conditions

| <b>Page Name</b>                                          | <b>Definition Name</b> | <b>Usage</b>                                                                                            |
|-----------------------------------------------------------|------------------------|---------------------------------------------------------------------------------------------------------|
| <u>Workplace Table BRA Page</u>                           | WORKPLACE_BRA          | Define work environments.                                                                               |
| <u>Protection Equipment BRA Page</u>                      | PROT_EQUIPMENT_BRA     | Define protection equipment for individual use.                                                         |
| <u>Environmental Responsible BRA - Name Page</u>          | HA_RESPONSIBLE_BRA     | Enter names of individuals who evaluate work environments and conditions of workers.                    |
| <u>Environmental Responsible BRA - Address Page</u>       | HA_RESPO_ADDR_BRA      | Enter addresses of individuals who evaluate work environments and conditions of workers.                |
| <u>Environmental Responsible BRA - Registry Data Page</u> | HA_RESPO_REGIS_BRA     | Enter registration information of individuals who evaluate work environments and conditions of workers. |

| <b>Page Name</b>                      | <b>Definition Name</b> | <b>Usage</b>                                                                   |
|---------------------------------------|------------------------|--------------------------------------------------------------------------------|
| <u>Worker Conditions Page</u>         | WORKER_ENVIRON_BRA     | List workplaces that are associated with workers.                              |
| <u>Hazard Agent/IPE Page</u>          | WORKER_HAZARD_BRA      | List work hazards and protection equipment that are associated with workers.   |
| <u>Environmental Responsible Page</u> | WORKER_RESPON_BRA      | Specify individuals who evaluate work environments and conditions for workers. |

## Workplace Table BRA Page

Use the Workplace Table BRA page (WORKPLACE\_BRA) to define work environments.

Navigation:

**Workforce Monitoring > Health and Safety > Define Hazardous Environments > Workplace Table BRA > Workplace Table BRA**

This example illustrates the fields and controls on the Workplace Table BRA page.

**Workplace Table BRA**

Company KRC Empresa Demonstração Ltda  
 Workplace Location Employer Establishment  
 Workplace Code EE1000

**Additional Information**  1 of 1 View All

\*Effective Date 05/21/2020  \*Status Active   
 \*Description HQ 1  
 \*Details HQ Building 1

**Establishments List**

All Establishments

**Establishments**

| *Establishment ID | Description      |
|-------------------|------------------|
| 1 KRC1-1          | Matriz São Paulo |

Use this page to define places in companies where employees perform their job functions, for example, offices or factories.

| <b>Field or Control</b> | <b>Description</b>                                   |
|-------------------------|------------------------------------------------------|
| <b>Company</b>          | Displays the company to which the workplace belongs. |

| <b>Field or Control</b>        | <b>Description</b>                                                                                                                                                                             |
|--------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Workplace Location</b>      | Displays the type of establishment for the workplace. Valid values are:<br><br><i>Employer Establishment</i><br><br><i>Service Taker Establishment</i><br><br><i>Third Party Establishment</i> |
| <b>Workplace Code</b>          | Displays the code for the workplace definition.                                                                                                                                                |
| <b>Description and Details</b> | Enter the short and long descriptions for the workplace.                                                                                                                                       |

## Establishments List

This section appears if the *Employer Establishment* workplace location is selected.

| <b>Field or Control</b>   | <b>Description</b>                                                                                                                                                                                                                                                                                          |
|---------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>All Establishments</b> | Click this button if the workplace applies to all establishments of the company.                                                                                                                                                                                                                            |
| <b>Establishment ID</b>   | <p>If the workplace applies only to a selection of the company's establishments, enter the ID of each of these establishments in the <b>Establishments</b> grid.</p> <hr/> <p><b>Note:</b> Selected establishments must already be reported to the Government of Brazil through the S-1005 event.</p> <hr/> |

## Service Takers List

This section appears if the *Service Taker Establishment* workplace location is selected.

| <b>Field or Control</b>   | <b>Description</b>                                                                                                                                                                                                                                     |
|---------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>All Service Takers</b> | Click this button if the workplace applies to all service takers that are associated with the company.                                                                                                                                                 |
| <b>Establishment ID</b>   | If the workplace applies only to a selection of the company's service takers, enter the ID of the establishment in the <b>Service Takers</b> grid for the system to refine the list of available service takers to choose from for that establishment. |



| <b>Field or Control</b> | <b>Description</b>                                                                                                                                                                                                                                                                                       |
|-------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Service Taker</b>    | <p>Select the applicable service taker for the workplace.</p> <p>Available service takers have all been reported to the Government of Brazil through eSocial.</p> <hr/> <p><b>Note:</b> Selected service takers must already be reported to the Government of Brazil through the S-1020 event.</p> <hr/> |

### For Third Party Establishment

If the workplace defined is a third party establishment that is not registered in the PeopleSoft system and therefore not reported to the Government through eSocial, select *Third Party Establishment* as the workplace location.

Only one third party establishment is supported for each workplace definition.

| <b>Field or Control</b>        | <b>Description</b>                                                                                      |
|--------------------------------|---------------------------------------------------------------------------------------------------------|
| <b>Inscription Type and ID</b> | Select <i>CEI</i> or <i>CNPJ</i> as the desired inscription type, and enter the corresponding ID value. |

### Related Links

“S-1060 - Workplace Table” (PeopleSoft Global Payroll for Brazil)

## Protection Equipment BRA Page

Use the Protection Equipment BRA page (PROT\_EQUIPMENT\_BRA) to define protection equipment for individual use.

Navigation:

**Set Up HCM > Product Related > Workforce Monitoring > Health and Safety > Protection Equipment BRA > Protection Equipment BRA**

This example illustrates the fields and controls on the Protection Equipment BRA page.

**Protection Equipment BRA**

Set ID KRSI1
IPE Code COTTGLOV01

**Protection Equipment Profile**

\*Description COTTON GLOVES
\*Status Active

IPE AC 46567

Evaluation Document

Details COTTON GLOVES

AC Expiration date 01/15/2025

Provider 3M DO BRAZIL LTDA

| Field or Control                                                     | Description                                                                                                                                                                                                                                                                                                                            |
|----------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Description</b>                                                   | Enter a short description for the IPE (individual protection equipment). It can be a description that is used in the PeopleSoft system as opposed to the official description from the manufacturer.                                                                                                                                   |
| <b>IPE AC (individual protection equipment approval certificate)</b> | <p>Specify the approval certificate code of the IPE. An approval certificate is a document that the Ministry of Labor and Employment issued to attest the function and quality of the IPE.</p> <p><b>Note:</b> Enter information in one of these fields at a minimum: <b>IPE CA</b>, <b>Evaluation Document</b> or <b>Details</b>.</p> |
| <b>Evaluation Document</b>                                           | Enter the description for the IPE from the manufacturer, if the IPE AC number is not available.                                                                                                                                                                                                                                        |
| <b>Details</b>                                                       | Enter the information or description for the IPE in the Details field, if the IPE does not have an IPE AC code or evaluation document description.                                                                                                                                                                                     |
| <b>AC Expiration date</b>                                            | Enter an expiration date for the IPE, if applicable.                                                                                                                                                                                                                                                                                   |
| <b>Provider</b>                                                      | Enter the provider of the IPE.                                                                                                                                                                                                                                                                                                         |

## Environmental Responsible BRA - Name Page

Use the Environmental Responsible BRA - Name page (HA\_RESPONSIBLE\_BRA) to enter names of individuals who evaluate work environments and conditions of workers.

Navigation:

**Set Up HCM > Product Related > Workforce Monitoring > Health and Safety > Environment Responsible BRA > Name**

This example illustrates the fields and controls on the Environmental Responsible BRA - Name page.

Name

Address

Registry Data

Responsible ID

KR000000001

\*Name Format

Brazilian

▼

Edit Name

Display Name

MARINA GONCALVES

Environmental Responsible BRA - Address Page

Use the Environmental Responsible BRA - Address page (HA\_RESPO\_ADDR\_BRA) to enter addresses of individuals who evaluate work environments and conditions of workers.

Navigation:

**Set Up HCM > Product Related > Workforce Monitoring > Health and Safety > Environment Responsible BRA > Address**

This example illustrates the fields and controls on the Environmental Responsible BRA - Address page.

Name

Address

Registry Data

Responsible ID

KR000000001

GONCALVES,MARINA

Address

Country

BRA

🔍

Brazil

Address

Street CAMELIAS 332  
SAO PAULO Sao Paulo 05634-001

Edit Address

Environmental Responsible BRA - Registry Data Page

Use the Environmental Responsible BRA - Registry Data page (HA\_RESPO\_REGIS\_BRA) to enter registration information of individuals who evaluate work environments and conditions of workers.

Navigation:

## Set Up HCM > Product Related > Workforce Monitoring > Health and Safety > Environment Responsible BRA > Registry Data

This example illustrates the fields and controls on the Environmental Responsible BRA - Registry Data page.

| Name                                                                                                                                                                                                                                                                                                                                                                                                                                                        | Address | Registry Data |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------|---------------|
| <p>Responsible ID KR000000001 GONCALVES,MARINA</p>                                                                                                                                                                                                                                                                                                                                                                                                          |         |               |
| <p><b>Registry Data</b></p> <div> <p>*Organ Statutory <input type="text" value="CREA"/></p> <p>Organ Statutory Descr <input type="text"/></p> <p>*Register Number <input type="text" value="5300000"/></p> <p>Country BRA Brazil</p> <p>*State <input type="text" value="SP"/> <input type="button" value="Q"/> Sao Paulo</p> <p>NIS/PIS <input type="text" value="4300000000"/></p> <p>*CPF National ID <input type="text" value="2900000000"/></p> </div> |         |               |

| Field or Control | Description                                                                                                                                                                                                                                                                                          |
|------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Organ Statutory  | <p>Select the organization to which the registration information pertains. Values are:</p> <p><i>CREA</i></p> <p><i>Not Applicable</i></p> <p><i>Other</i></p> <p>For each selection, enter the corresponding registration information. Certain fields are required based on the selected value.</p> |

## Worker Conditions Page

Use the Worker Conditions page (WORKER\_ENVIRON\_BRA) to list workplaces that are associated with workers.

Navigation:

## Workforce Monitoring > Health and Safety > Define Hazardous Environments > Worker Conditions BRA > Worker Conditions

This example illustrates the fields and controls on the Worker Conditions page.

Worker Conditions

Hazard Agent/IPE

Environmental Responsible

Employee ID

KRE0005

Empl Record

0

Name

Francle Avelino de Araujo

Worker Conditions Details

1 of 1

View All

\*Effective Date

10/07/2021

\*Status

Active

+ -

\*Workplace Location

Employer Establishment

Workplace Code

LAB0000022

Workplace Description

Laboratory - Campinas

\*Establishment ID

\*Performed Activities

Environmental Records

Observation

Use this and other pages of the Worker Conditions BRA component to specify the work environments for workers and the hazards they face at work. This information is used in the S-2240 event reporting in eSocial.

**Important!** When there is a change in the working environment or condition of the worker, for example, a new work location or the worker is exposed to new work hazard, enter a new effective-dated row with the information for it to be reported to the Government properly.

Worker Conditions Details

| Field or Control   | Description                                                                                         |
|--------------------|-----------------------------------------------------------------------------------------------------|
| Workplace Location | Select if the workplace is an <i>Employer Establishment</i> or <i>Service Taker Establishment</i> . |

| <b>Field or Control</b>                  | <b>Description</b>                                                                                                                                                                                                                                                                                                                                                                             |
|------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Workplace Code</b>                    | <p>Select the applicable workplace code. Only workplaces that match the worker's company and the selected workplace location are available for selection. You can only select the same code once for any given effective date.</p> <p>Either the workplace code or workplace description must be specified.</p> <p>Workplaces are defined on the <a href="#">Workplace Table BRA Page</a>.</p> |
| <b>Workplace Description</b>             | Displays the description of the selected workplace code. If no workplace code is selected, enter the description manually.                                                                                                                                                                                                                                                                     |
| <b>Establishment ID</b>                  | Select the applicable establishment, which is required. Only establishments that match the worker's company, selected workplace location and workplace code (if selected) are available for selection.                                                                                                                                                                                         |
| <b>Service Taker</b>                     | <p>Select the applicable service taker. Only service takers that match the worker's company, selected workplace location, workplace code (if selected) and establishment are available for selection.</p> <p>This field appears if the selected workplace location is <i>Service Taker Establishment</i>. The field is required.</p>                                                           |
| <b>CEI/CNPJ and CEI/CNPJ Description</b> | <p>Enter the CEI or CNPJ number and description of the applicable service taker. These fields are displayed instead of the <b>Service Taker</b> field, if the BRA - Brazil option is not selected on the Global Payroll Country Extensions page (INSTALL_GP_SEC) of the installation table. These fields are required.</p> <p>See Also "Products Page" (Application Fundamentals).</p>         |
| <b>Performed Activities</b>              | Enter the activities that the worker performs on the job. This field is required.                                                                                                                                                                                                                                                                                                              |

## Environmental Records

| <b>Field or Control</b> | <b>Description</b>                                                                                                    |
|-------------------------|-----------------------------------------------------------------------------------------------------------------------|
| <b>Observation</b>      | Enter any observation or information about the workplace environment in the specified establishment or service taker. |

## Hazard Agent/IPE Page

Use the Hazard Agent/IPE page (WORKER\_HAZARD\_BRA) to list work hazards and protection equipment that are associated with workers.

Navigation:

**Workforce Monitoring > Health and Safety > Define Hazardous Environments > Worker Conditions BRA > Hazard Agent/IPE**

This example illustrates the fields and controls on the Hazard Agent/IPE page (1 of 3).

|                   |  |                         |  |                           |  |
|-------------------|--|-------------------------|--|---------------------------|--|
| Worker Conditions |  | <b>Hazard Agent/IPE</b> |  | Environmental Responsible |  |
|-------------------|--|-------------------------|--|---------------------------|--|

|             |         |             |   |      |                           |
|-------------|---------|-------------|---|------|---------------------------|
| Employee ID | KRE0005 | Empl Record | 0 | Name | Francle Avelino de Araujo |
|-------------|---------|-------------|---|------|---------------------------|

|                           |  |  |   |  |        |   |   |    |
|---------------------------|--|--|---|--|--------|---|---|----|
| <b>Hazard/IPE Details</b> |  |  | Q |  | 1 of 1 | ▼ | ▶ | ▶▶ |
|---------------------------|--|--|---|--|--------|---|---|----|

Effective Date 10/07/2021

|                      |  |  |   |  |        |   |   |    |
|----------------------|--|--|---|--|--------|---|---|----|
| <b>Hazard Factor</b> |  |  | Q |  | 1 of 1 | ▼ | ▶ | ▶▶ |
|----------------------|--|--|---|--|--------|---|---|----|

|                          |                |   |                     |  |  |     |  |
|--------------------------|----------------|---|---------------------|--|--|-----|--|
| Set ID                   | KRSI1          | Q | Brazilian SetID 1   |  |  | + - |  |
| Hazard ID                | KR001          | Q | MECHANICAL WORKSHOP |  |  |     |  |
| *Hazard Agent Code       |                | Q |                     |  |  |     |  |
| *Hazard Evaluation Type  | Quantitative ▼ |   |                     |  |  |     |  |
| *Hazard Unit             | 01             | Q | Daily dose of noise |  |  |     |  |
| *Number of Units         | 74341.00000    |   |                     |  |  |     |  |
| Tolerance Limit          | 122356.00000   |   |                     |  |  |     |  |
| *Technique Used          | AUDIOMETRIC    |   |                     |  |  |     |  |
| Hazard Agent Description |                |   |                     |  |  |     |  |

This example illustrates the fields and controls on the Hazard Agent/IPE page (2 of 3).

**CPE/IPE Information**

\* Does the Company implement collective protection measures (CPEs) to eliminate or reduce workers exposure to the risk factor?

\* Are CPEs effective in neutralizing risks to the worker?

\* Utilization of IPE

\* Are IPEs effective in neutralizing risks to the worker?

**IPE Details**

**IPE Code Data**

1-1 of 1

|   | IPE Code                      | Description | IPE AC |                                  |                                  |
|---|-------------------------------|-------------|--------|----------------------------------|----------------------------------|
| 1 | <input type="text" value=""/> |             |        | <input type="button" value="+"/> | <input type="button" value="-"/> |

This example illustrates the fields and controls on the Hazard Agent/IPE page (3 of 3).

**IPE Complementary Information**

Have we attempted to implement collective protection measures of an administrative or organizational nature, opting for IPE due to technical unfeasibility, insufficiency or inter-nity, or even in a complementary or emergency character?

Have the operating conditions of the IPE been observed over time, according to the technical specification of the national manufacturer or importer, adjusted to the field conditions?

Was observed the uninterrupted use of the IPE over time, according to the technical specification of the national manufacturer or importer, adjusted to the field conditions?

Has the validity period of the Certificate of Approval - CA of the Mtb been observed at the time of purchase of the equipment?

Is it observed the periodicity of exchange defined by the national manufacturer or importer and / or environment programs, proven by receipt signed by the user at his own time?

Is the sanitization observed according to the national manufacturer or importer?

## Hazard Factor

| Field or Control | Description                                                                                                                                                  |
|------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Set ID           | Select the applicable setID. The system uses the specified setID to determine the list of available hazard IDs and IPE codes (in the IPE Code Data section). |



| <b>Field or Control</b>       | <b>Description</b>                                                                                                                                                                                                                                                                                                                                                                               |
|-------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Hazard ID</b>              | Select the ID of the work hazard to which the worker is exposed. The system populates other fields in this section based on the selected hazard ID.                                                                                                                                                                                                                                              |
| <b>Hazard Agent Code</b>      | <p>Select the hazard agent code for the selected hazard. This field is required.</p> <hr/> <p><b>Note:</b> Do not associate a worker with the <i>09.01.001</i> (Absence of harmful agents) hazard agent code and another hazard agent code for the same time period.</p> <hr/> <p>Hazard agent codes are defined on the “Hazard Agent Code BRA Page” (PeopleSoft Global Payroll for Brazil).</p> |
| <b>Proceeding Number</b>      | If the selected hazard agent code is <i>05.01.001</i> , which indicates that no applicable code is listed, enter the proceeding number for the harmful agent in the <b>Proceeding Number</b> field that appears.                                                                                                                                                                                 |
| <b>Hazard Evaluation Type</b> | <p>Select an evaluation type for the work hazard, <i>Qualitative</i> or <i>Quantitative</i>. This field is required.</p> <p>If the hazard agent code is <i>09.01.001</i>, this field becomes unavailable for edit.</p>                                                                                                                                                                           |
| <b>Hazard Unit</b>            | <p>Select a unit of measure for the work hazard. This required field appears if the hazard evaluation type is <i>Quantitative</i>.</p> <p>Hazard units are defined on the <a href="#">Hazard Units BRA Page</a>.</p>                                                                                                                                                                             |
| <b>Number of Units</b>        | Enter the unit number of the work hazard to which the worker is exposed to. This required field appears if the hazard evaluation type is <i>Quantitative</i> .                                                                                                                                                                                                                                   |
| <b>Tolerance Limit</b>        | Enter worker’s highest acceptable limit of the work hazard. This field appears if the hazard evaluation type is <i>Quantitative</i> , and is required if the selected hazard agent code is <i>01.18.001</i> or <i>02.01.014</i> . The system generates a mapping error in eSocial if the required tolerance limit value does not exist for either hazard agent code.                             |
| <b>Technique Used</b>         | Enter the technique used to measure the work hazard. This required field appears if the evaluation type is <i>Quantitative</i> .                                                                                                                                                                                                                                                                 |

| <b>Field or Control</b>         | <b>Description</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|---------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Hazard Agent Description</b> | <p>Enter a description for the selected hazard agent code. This field is required if you select one of these hazard agent codes: <i>01.01.001, 01.02.001, 01.03.001, 01.04.001, 01.05.001, 01.06.001, 01.07.001, 01.08.001, 01.09.001, 01.10.001, 01.12.001, 01.13.001, 01.14.001, 01.15.001, 01.16.001, 01.17.001, 01.18.001, or 05.01.001.</i></p> <p>The system generates a mapping error in eSocial if the required value does not exist for any hazard agent code previously mentioned.</p> |

## CPE/IPE Information

Use this section to answer questions about the company's implementation of collective equipment to protect the worker from the specified work hazard. Answer all available questions.

If the hazard agent code is *09.01.001*, this section becomes unavailable for edit.

| <b>Field or Control</b>                                                                                                             | <b>Description</b>                                                                                                                                                                         |
|-------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Does the Company implement collective protection measures (CPEs) to eliminate or reduce workers exposure to the risk factor?</b> | If you select <i>Implement</i> , the question on the CPE's effectiveness becomes editable and required.                                                                                    |
| <b>Are CPEs effective in neutralizing risks to the worker?</b>                                                                      | Select <i>Yes</i> or <i>No</i> .                                                                                                                                                           |
| <b>Utilization of IPE</b>                                                                                                           | If you select <i>Used</i> , the question on the IPE's effectiveness becomes editable and required. The <b>IPE Code Data</b> and <b>IPE Complementary Information</b> sections also appear. |
| <b>Are IPEs effective in neutralizing risks to the worker?</b>                                                                      | Select <i>Yes</i> or <i>No</i> .                                                                                                                                                           |

## IPE Code Data

This section appears if the **Utilization of IPE** field is set to *Used*. Information in this information is required.

| <b>Field or Control</b> | <b>Description</b>                                                                                                                                                                                               |
|-------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>IPE Code</b>         | Select an individual equipment that the worker uses to protect himself or herself from the work hazard. This is a required field.<br><br>IPEs are defined on the <a href="#">Protection Equipment BRA Page</a> . |
| <b>IPE AC</b>           | Displays the approval certificate number of the IPE.                                                                                                                                                             |

## IPE Complementary Information

This section appears if the **Utilization of IPE** field is set to *Used*. Answer questions about the company's implementation of individual protection equipment to protect the worker from the specified work hazard. All questions are required.

## Environmental Responsible Page

Use the Environmental Responsible page (WORKER\_RESPON\_BRA) to specify individuals who evaluate work environments and conditions for workers.

Navigation:

**Workforce Monitoring > Health and Safety > Define Hazardous Environments > Worker Conditions BRA > Environmental Responsible**

This example illustrates the fields and controls on the Environmental Responsible page.

The screenshot displays the 'Environmental Responsible' page within a software application. At the top, there are three tabs: 'Worker Conditions', 'Hazard Agent/IPE', and 'Environmental Responsible', with the latter being the active tab. Below the tabs, the following information is displayed: Employee ID KRE0005, Empl Record 0, and Name Francle Avelino de Araujo. The main content area is divided into two sections. The first section, 'Environment Responsible', includes a search bar and a pagination control showing '1 of 1'. The second section, 'Responsible Information', also features a search bar and a '1 of 1' pagination control. This section contains several fields: '\*Organ Statutory' (CRM), 'Physician ID' (63000000001), 'CRM' (00000000000), 'Country' (BRA), 'State' (MT), 'NIS/PIS' (00000000001), and 'CPF National ID' (63100000005). There are also '+' and '-' buttons next to the 'Responsible Information' section.

## Responsible Information

| <b>Field or Control</b> | <b>Description</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|-------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Organ Statutory</b>  | <p>Select the organization to which the individual belongs. Values are:</p> <p><i>CREA</i></p> <p><i>CRM</i></p> <p><i>Not Applicable</i></p> <p><i>Other</i></p>                                                                                                                                                                                                                                                                                                                                                                             |
| <b>Responsible ID</b>   | <p>Select the person (for example, doctor or engineer) responsible for evaluating the work environments of the worker. This field appears if <i>CREA</i>, <i>Not Applicable</i>, or <i>Other</i> is selected.</p> <p>Individuals who serve as evaluators of work environments are defined using the Environment Responsible BRA component.</p> <p>If the person is not already defined in the HCM system, enter the registration information manually.</p> <p>See Also <a href="#">Environmental Responsible BRA - Registry Data Page</a></p> |
| <b>Physician ID</b>     | <p>Select the physician as the person responsible for evaluating the work conditions of the worker. This field appears if <i>CRM</i> is selected.</p> <p>Physicians are defined using the Medical Register BRA component.</p> <p>If the person is not already defined in the HCM system, enter the registration information manually.</p> <p>See Also <a href="#">Medical Register Page</a></p>                                                                                                                                               |
| <b>CPF National ID</b>  | <p>This field is required if only one hazard agent code specified on the <a href="#">Hazard Agent/IPE Page</a> is <i>09.01.001</i>. The CPF used must be unique for each Environment Responsible row.</p>                                                                                                                                                                                                                                                                                                                                     |

## Chapter 3

# Defining Additional Tables for Global Incident Reporting

## (AUS) Setting Up Australian Claims Threshold Tables

To manage claims threshold details, use the Claim Info Aus (CLAIM\_INFO\_CLAIM), Claim Info State (CLAIM\_INFO\_STATE), and Claim Info Union (CLAIM\_INFO\_UNION) components.

This section discusses how to establish claims by state.

### Pages Used to Establish Claims Thresholds

| <i>Page Name</i>                         | <i>Definition Name</i> | <i>Usage</i>                                                                                                                                                                                                                                                                                          |
|------------------------------------------|------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <u>Claim Threshold - Claims AUS Page</u> | CLAIM_INFO_AUS         | <ul style="list-style-type: none"><li>• Establish claims threshold information by state.</li><li>• Establish claims threshold information by union.</li><li>• Establish claims threshold information for a claim with an approved status. You must have a claim number to access this page.</li></ul> |

### Claim Threshold - Claims AUS Page

Use the Claim Threshold - Claims AUS page (CLAIM\_INFO\_AUS) to establish claims threshold information for a claim with an approved status.

You must have a claim number to access this page.

Navigation:

- **Set Up HCM > Product Related > Workforce Monitoring > Health and Safety > Claim Threshold - Claims AUS > Claim Threshold - Claims AUS**
- **Workforce Monitoring > Health and Safety > Define Medical Services > Claim Threshold - Claims AUS > Claim Threshold - Claims AUS**
- **Workforce Monitoring > Health and Safety > Define Medical Services > Claim Threshold - State AUS > Claim Threshold - Claims AUS**

This example illustrates the fields and controls on the Claim Threshold - Claims AUS page. You can find definitions for the fields and controls later on this page.

**Claim Threshold - Claims AUS**

Claim Number 00094000

Expense Threshold 
 Pre Injury Threshold 
☐ Use Schedule Fee

\*Set ID 
 Table Set shared across Corp

Vendor ID

**Makeup Details**

1-1 of 1

|   | Threshold Days       | Claimable Percent    | Makeup Pay %         |                                  |                                  |
|---|----------------------|----------------------|----------------------|----------------------------------|----------------------------------|
| 1 | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="button" value="+"/> | <input type="button" value="-"/> |

**Note:** Use the Claim Threshold pages to establish claims threshold information by state, union, or claim. This information is used to process reimbursable expenses related to health and safety incidents and worker injuries resulting in treatment and lost work time. The pages that you use to establish claim thresholds by state, union, and by claim are similar.

| <i>Field or Control</i>                  | <i>Description</i>                                                                                                                                                                |
|------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Expense Threshold</b>                 | Enter an amount and the number of <b>Pre Injury Threshold</b> days that must pass before you can present a percentage of the worker's wages to an insurance provider for payment. |
| <b>Use the Schedule Fee</b>              | Select to indicate that you use the schedule provided by the insurer.                                                                                                             |
| <b>Vendor ID</b>                         | Indicate the insurer responsible for processing the company's reimbursable expense claims.                                                                                        |
| <b>Threshold Days</b>                    | Enter the number of days.                                                                                                                                                         |
| <b>Claimable Percent</b>                 | Enter a value. This field represents the insurer's liability.                                                                                                                     |
| <b>Makeup Pay % (makeup pay percent)</b> | This field represents the organization's liability for the worker's wages.                                                                                                        |

## Example

Based on **10 Pre Injury Threshold Days** before the organization can pass on claims expenses to the insurer, a company pays **100** percent of the worker's claim for lost wages for the first ten days that the worker is absent. After the tenth day, the company can pass on **95** percent of the worker's wage claims to

the Insurer. To establish these parameters, you would enter the following values in the **Makeup Details** group box:

| <i><b>Threshold Days</b></i> | <i><b>Claimable Percent</b></i> | <i><b>Makeup Pay %</b></i> |
|------------------------------|---------------------------------|----------------------------|
| 0                            | 0                               | 100                        |
| 10                           | 95                              | 5                          |

---

## (BRA) Setting Up Parameters for the PPP Report for Brazil

To set up parameters for the PPP report for Brazil use the PPP Parameters BRA (PPP\_PARAM\_BRA) component.

This section discusses how to identify parameters for the PPP report for Brazil.

### Page Used to Identify Parameters for the PPP Report for Brazil

| <i><b>Page Name</b></i>        | <i><b>Definition Name</b></i> | <i><b>Usage</b></i>                                                               |
|--------------------------------|-------------------------------|-----------------------------------------------------------------------------------|
| <u>PPP Parameters BRA Page</u> | PPP_PARAM_BRA                 | Identify PPP parameters that you will use when running the PPP report for Brazil. |

### PPP Parameters BRA Page

Use the PPP Parameters BRA page (PPP\_PARAM\_BRA) to identify PPP parameters that you will use when running the PPP report for Brazil.

Navigation:

**Set Up HCM > Product Related > Workforce Monitoring > Health and Safety > PPP Parameters BRA > PPP Parameters BRA**

This example illustrates the fields and controls on the PPP Parameters BRA page. You can find definitions for the fields and controls later on this page.

**PPP Parameters BRA**

Company KRC Empresa Demonstração Ltda  
Parameter ID 1

**PPP Parameters Detail** 1 of 1 View All

Effective Date 05/21/2020 + -

**Action/Reason Selection Criteria** 1-1 of 1 View All

|   | *Action            | Action Description | *Reason            | Description |                |                |
|---|--------------------|--------------------|--------------------|-------------|----------------|----------------|
| 1 | HIR <span>Q</span> | Hire               | FST <span>Q</span> | First Job   | <span>+</span> | <span>-</span> |

**PPP Valid Exams** 1-1 of 1 View All

|   | *Type of Exam                 | Medical Exam Type            |                |                |
|---|-------------------------------|------------------------------|----------------|----------------|
| 1 | Pre-Employment <span>▼</span> | Physical Exam <span>▼</span> | <span>+</span> | <span>-</span> |

| Field or Control         | Description                                                                                                                                                                     |
|--------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Action and Reason</b> | Enter the actions and reasons that should be included on the PPP report for the company.                                                                                        |
| <b>Type of Exam</b>      | Select the examination type based on business need that should appear on the PPP report. Create new rows to add all additional examination types required.                      |
| <b>Medical Exam Type</b> | Select the medical examination to perform for this exam type. Valid values are <i>Audiometric Exam</i> , <i>Eye Exam</i> , <i>Physical Exam</i> , and <i>Respiratory Exam</i> . |

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

To set up Canadian Workers' Compensation Board (WCB) reporting, use the Class/Subclass Table - CAN (HS\_CLASS\_CAN), Occupational Table - CAN (HS\_OCCUPATION\_CAN), Contributing Factors - CAN (HS\_CONTFAC\_CAN), and Preventative Actions Table - CAN (HS\_PREVENT\_ACT\_CAN) components.

This section provides an overview of the setup steps for WCB reporting.



## Pages Used to Set Up WCB Reporting

| <i>Page Name</i>                                                          | <i>Definition Name</i> | <i>Usage</i>                                                                                                                                 |
|---------------------------------------------------------------------------|------------------------|----------------------------------------------------------------------------------------------------------------------------------------------|
| <u>Class/Subclass Table - CAN Page or Class/Subclass CAN Page</u>         | HS_CLASS_CAN           | Identify the standard industry classes and subclasses for Canadian business locations, based upon the classifications designated by the WCB. |
| <u>Occupation Table - CAN Page or Occupations CAN Page</u>                | HS_OCCUPATION_CAN      | Set up the standard occupational classifications used by the WCB.                                                                            |
| <u>Contributing Factors - CAN Page or Contributing Factors CAN Page</u>   | HS_CONTFAC_CAN         | Define the types of casual factors associated with a health and safety incident.                                                             |
| <u>Prevent. Actions Table - CAN Page or Preventative Actions CAN Page</u> | HS_PREVENT_ACT_CAN     | Identify the types of actions taken to prevent future occurrences of incidents and accidents.                                                |

## Setup Steps for WCB Reporting

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

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

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

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

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

The organization's occupation codes (job titles, for example) might not match the standard occupational classifications used by the WCB.

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

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

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

---

**Note:** Approved codes for the Workers Compensation Board can vary by regulatory region. Use the codes that are industry-specific and approved by the provincial WCB office.

---

Class/Subclass Table - CAN Page or Class/Subclass CAN Page

Use the Class/Subclass Table - CAN (or Class/Subclass CAN) page (HS\_CLASS\_CAN) to identify the standard industry classes and subclasses for Canadian business locations, based upon the classifications designated by the WCB.

Navigation:

- **Set Up HCM > Product Related > Workforce Monitoring > Health and Safety > Class/Subclass Table - CAN > Class/Subclass Table - CAN**
- **Workforce Monitoring > Health and Safety > Define Accident/Injury Info > Class/Subclass CAN > Class/Subclass CAN**

This example illustrates the fields and controls on the Class/Subclass Table - CAN page. You can find definitions for the fields and controls later on this page.

Class/Subclass Table - CAN

Class/Subclass10400

Details

1 of 1

View All

\*Effective Date01/01/1980

\*StatusActive

+

-

DescriptionPulp & Paper

Short DescriptionPulp&Paper

| Field or Control | Description                                                                                                                                                                                   |
|------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Class/Subclass   | The <b>Class/Subclass</b> code that you entered to access this page appears in this field. Use this value on the Incident Details - Incident page and the Injury Details - Work Related page. |

Occupation Table - CAN Page or Occupations CAN Page

Use the Occupation Table - CAN (or Occupations CAN) page (HS\_OCCUPATION\_CAN) to set up the standard occupational classifications used by the WCB.

Navigation:

- **Set Up HCM > Product Related > Workforce Monitoring > Health and Safety > Occupation Table - CAN > Occupation Table - CAN**
- **Workforce Monitoring > Health and Safety > Define Accident/Injury Info > Occupations CAN > Occupations CAN**

66

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This example illustrates the fields and controls on the Occupation Table - CAN page. You can find definitions for the fields and controls later on this page.

Occupation Table - CAN

Occupation Code    A011001

Details

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1 of 1

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View All

\*Effective Date

01/01/1980

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\*Status

Active

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\*Description

LEGISLATORS-ALDERMAN CABINET MINISTER

Short Description

LEGISLATOR

| Field or Control | Description                                                                                                                 |
|------------------|-----------------------------------------------------------------------------------------------------------------------------|
| Occupation Code  | The occupation code that you enter to access this page appears in this field. Use this code on the Employment Details page. |

Contributing Factors - CAN Page or Contributing Factors CAN Page

Use the Contributing Factors - CAN (or Contributing Factors CAN) page (HS\_CONFAC\_CAN) to define the types of casual factors associated with a health and safety incident.

Navigation:

- **Set Up HCM > Product Related > Workforce Monitoring > Health and Safety > Contributing Factors - CAN > Contributing Factors CAN**
- **Workforce Monitoring > Health and Safety > Define Accident/Injury Info > Contributing Factors CAN > Contributing Factors CAN**

This example illustrates the fields and controls on the Contributing Factors CAN page. You can find definitions for the fields and controls later on this page.

Contributing Factors - CAN

Contrib Factor    00002

Details

Q

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1 of 1

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View All

\*Effective Date

01/01/1980

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\*Status

Active

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\*Description

INFLUENCE OF ALCOHOL OR DRUGS SUSPECTED

Short Description

ALCOHOL

| <b>Field or Control</b>                     | <b>Description</b>                                                                                                                                 |
|---------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Contrib Factor</b> (contributing factor) | The contributing factor code that you entered to access this page appears in this field. Use this code on the Incident Details - Description page. |

## Prevent. Actions Table - CAN Page or Preventative Actions CAN Page

Use the Prevent. Actions Table - CAN page (HS\_PREVENT\_ACT\_CAN) to identify the types of actions taken to prevent future occurrences of incidents and accidents.

Navigation:

- **Set Up HCM > Product Related > Workforce Monitoring > Health and Safety > Prevent. Actions Table - CAN > Prevent. Actions Table - CAN**
- **Workforce Monitoring > Health and Safety > Define Accident/Injury Info > Preventative Actions CAN > Preventative Actions CAN**

This example illustrates the fields and controls on the Prevent. Actions Table - CAN page. You can find definitions for the fields and controls later on this page.

**Prevent. Actions Table - CAN**

Preventative Action 00024

Details

| 
 << < 1 of 1 > >> 
 View All

\*Effective Date

01/01/1980

\*Status

Active

+ -

\*Description

ESTABLISH CLOSER SUPERVISION

Short Description

ESTSUPV

| <b>Field or Control</b>    | <b>Description</b>                                                                                                                                    |
|----------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Preventative Action</b> | The preventative action code that you entered to access this page appears in this field. Use this code on the Consequent Actions - Preventative page. |

## (DEU) Setting Up German Employers' Liability Insurance Association Reporting

To set up for employers' liability Insurance Reporting in Germany, use the Case Officer Table DEU (HS\_LOC\_CASEOFF\_GER), Social Insurance Unit (SI\_UNIT\_GER), Correct. Actions Table DEU (HS\_CORRECT\_ACT\_GER), Disease Class Table DEU (HS\_DIS\_CLASS\_GER), Prevent. Actions Table - GER (HS\_PREVENT\_ACT\_GER), Unsafe Item Table DEU (HS\_UNSAFE\_ITEM\_GER), Work Area Class Table DEU (HS\_WA\_CLS\_TBL\_GER), Work Area Table DEU (HS\_WA\_TBL\_GER), Work

Area Category Table DEU (HS\_WA\_CTG\_TBL\_GER), and Coop Society Data (HS\_COOP\_SOC\_GER) components.

This section discusses how to set up German employers' liability insurance association reporting.

---

**Note:** You establish the codes that are defined by the employer's liability insurance association for use in tracking and reporting health and safety incidents. Be sure to use industry-specific codes that are approved by the employer's liability insurance association.

---

## Pages Used to Set Up German Employers' Liability Insurance Association Reporting

| <b>Page Name</b>                                                          | <b>Definition Name</b> | <b>Usage</b>                                                                                                                                                                                                                                                   |
|---------------------------------------------------------------------------|------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <u>Case Officer Table DEU Page or Case Officer DEU Page</u>               | HS_LOC_CASEOFF_GER     | Identify the officials for various areas of industrial health and safety within the organization. This information is used to identify incident case officers on the Employee page, the Injury Details - Reporting page, and the Case Officer Assignment page. |
| <u>Social Insurance Unit Page</u>                                         | SI_UNIT_GER            | Set up the organization's Social Insurance Unit ID (Betriebsnummer). Use this number when reporting information to any public office.                                                                                                                          |
| <u>Correct. Actions Table DEU Page or Corrective Actions DEU Page</u>     | HS_CORRECT_ACT_GER     | Define corrective actions that you have implemented and associate the corrective action with a corrective action category.                                                                                                                                     |
| <u>Disease Class Table DEU Page or Disease Class DEU Page</u>             | HS_DIS_CLASS_GER       | Define disease classes and associate them with a disease type.                                                                                                                                                                                                 |
| <u>Prevent. Actions Table - DEU Page or Preventative Actions DEU Page</u> | HS_PREVENT_ACT_GER     | Define the actions that you have implemented to prevent workplace incidents or accidents.                                                                                                                                                                      |
| <u>Unsafe Item Table DEU Page or Unsafe Items DEU Page</u>                | HS_UNSAFE_ITEM_GER     | Define unsafe items and associate them with an unsafe item class.                                                                                                                                                                                              |
| <u>Work Area Class Table DEU Page or Work Area Class DEU Page</u>         | HS_WA_CLS_TBL_GER      | Set up work area classes as defined by the employer's liability insurance association.                                                                                                                                                                         |
| <u>Work Area Category Table DEU Page or Work Area Category DEU Page</u>   | HS_WA_CTG_TBL_GER      | Set up work area categories as defined by the employer's liability insurance association.                                                                                                                                                                      |

| <b>Page Name</b>                                      | <b>Definition Name</b> | <b>Usage</b>                                                                    |
|-------------------------------------------------------|------------------------|---------------------------------------------------------------------------------|
| <u>Work Area Table DEU Page or Work Area DEU Page</u> | HS_WA_TBL_GER          | Set up work areas as defined by the employer's liability insurance association. |
| <u>Coop Society Data Page</u>                         | HS_COOP_SOC_GER        | Associate an insurer's industrial hazard code with an employee.                 |

## Case Officer Table DEU Page or Case Officer DEU Page

Use the Case Officer Table DEU (or Case Officer DEU) page (HS\_LOC\_CASEOFF\_GER) to identify the officials for various areas of industrial health and safety within the organization.

This information is used to identify incident case officers on the Employee page, the Injury Details - Reporting page, and the Case Officer Assignment page.

Navigation:

- **Set Up HCM > Product Related > Workforce Monitoring > Health and Safety > Case Officer Table DEU > Case Officer Table DEU**
- **Workforce Monitoring > Health and Safety > Define Accident/Injury Info > Case Officer DEU > Case Officer DEU**

This example illustrates the fields and controls on the Case Officer Table DEU page. You can find definitions for the fields and controls later on this page.

### Case Officer Table DEU

Set ID DEU01
Location Code GD917

Case Officers

1 of 1
View All

\*Effective Date 05/21/2020

Details

1-1 of 1
View All

\*Empl ID

\*Officer Type

| <b><i>Field or Control</i></b> | <b><i>Description</i></b>                                                                                                                                                                                                                                                        |
|--------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Officer Type</b>            | <p>Select a type from the list of available options to classify the employee as a particular type of company case officer, such as a <i>Health and Safety Specialist</i>, a <i>Company Physician</i>, and so on.</p> <p>You can assign multiple officer types to a location.</p> |

## Social Insurance Unit Page

Use the Social Insurance Unit page (SI\_UNIT\_GER) to set up the organization's Social Insurance Unit ID (Betriebsnummer).

Use this number when reporting information to any public office.

Navigation:

**Set Up HCM > Product Related > Workforce Administration > Workforce Data DEU > Social Insurance Unit > Social Insurance Unit**

This example illustrates the fields and controls on the Social Insurance Unit page. You can find definitions for the fields and controls later on this page.

Social Insurance Unit

Social Insurance Unit   GD0912

Social Insurance Unit Information

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1 of 1

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View All

\*Effective Date

01/01/1980

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\*Status

Active

▼

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\*Description

SI Unit for GD1 Munich

Short Description

SI Munich

BTNR

91200003

| <i><b>Field or Control</b></i> | <i><b>Description</b></i>                                   |
|--------------------------------|-------------------------------------------------------------|
| <b>BTNR</b> (Betriebsnummer)   | Enter the employer's social insurance number for this unit. |

**Correct. Actions Table DEU Page or Corrective Actions DEU Page**

Use the Correct. Actions Table DEU (or Corrective Actions DEU) page (HS\_CORRECT\_ACT\_GER) to define corrective actions that you have implemented and associate the corrective action with a corrective action category.

Navigation:

- **Set Up HCM > Product Related > Workforce Monitoring > Health and Safety > Correct. Actions Table DEU > Correct. Actions Table DEU**

- **Workforce Monitoring > Health and Safety > Define Accident/Injury Info > Corrective Actions DEU > Corrective Actions DEU**

This example illustrates the fields and controls on the Correct. Actions Table DEU page. You can find definitions for the fields and controls later on this page.

Correct. Actions Table DEU

Corrective Actions    A12

Details

1 of 1

View All

Effective Date

05/21/2020

Status

Active

+

-

Description

Ergonomic Training

Short Description

Ergo Train

Action Category

Corrective Actions

| Field or Control   | Description                                                                                                                                                                               |
|--------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Corrective Actions | The corrective action code that you entered appears in this field. This value is used on the Consequent Actions - Corrective page and the DEU Illness Tracking - Corrective Actions page. |
| Action Category    | Select an option from the list of available options.                                                                                                                                      |

Disease Class Table DEU Page or Disease Class DEU Page

Use the Disease Class Table DEU (or Disease Class DEU) page (HS\_DIS\_CLASS\_GER) to define disease classes and associate them with a disease type.

Navigation:

- **Set Up HCM > Product Related > Workforce Monitoring > Health and Safety > Disease Class Table DEU > Disease Class Table DEU**
- **Workforce Monitoring > Health and Safety > Define Accident/Injury Info > Disease Class DEU > Disease Class DEU**



This example illustrates the fields and controls on the Disease Class Table DEU page. You can find definitions for the fields and controls later on this page.

Disease Class Table DEU

Disease Class    KDA

Details

1 of 1

View All

Effective Date

01/01/1980

Status

Active

Description

Contagious

Short Description

Contagious

Disease Type

Infection

| Field or Control | Description                                                                                                                                                          |
|------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Disease Class    | The disease class code that you entered appears in this field. The disease class is used on the Occupational Illness Details page and the DEU Illness Profile pages. |
| Disease Type     | Associate the disease class with an appropriate disease type by selecting from the list of available options.                                                        |

Prevent. Actions Table - DEU Page or Preventative Actions DEU Page

Use the Prevent. Actions Table - DEU (or Preventative Actions DEU) page (HS\_PREVENT\_ACT\_GER) to define the actions that you have implemented to prevent workplace incidents or accidents.

Navigation:

- Set Up HCM > Product Related > Workforce Monitoring > Health and Safety > Prevent. Actions Table - DEU > Prevent. Actions Table - DEU
- Workforce Monitoring > Health and Safety > Define Accident/Injury Info > Preventative Actions DEU > Preventative Actions DEU

This example illustrates the fields and controls on the Prevent. Actions Table - DEU page. You can find definitions for the fields and controls later on this page.

Prevent. Actions Table - DEU

Preventative Action    P67

Details

1 of 1

View All

\*Effective Date

05/21/2020

\*Status

Active

\*Description

Vocational Training

Short Description

Voc Train

| <b>Field or Control</b>    | <b>Description</b>                                                                                                                                                          |
|----------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Preventative Action</b> | The preventative action code that you entered appears in this field. These codes are used on the Preventative Action Details and the DEU Causes/Preventative Actions pages. |

## Unsafe Item Table DEU Page or Unsafe Items DEU Page

Use the Unsafe Item Table DEU (or Unsafe Items DEU) page (HS\_UNSAFE\_ITEM\_GER) to define unsafe items and associate them with an unsafe item class.

Navigation:

- **Set Up HCM > Product Related > Workforce Monitoring > Health and Safety > Unsafe Item Table DEU > Unsafe Item Table DEU**
- **Workforce Monitoring > Health and Safety > Define Accident/Injury Info > Unsafe Items DEU > Unsafe Items DEU**

This example illustrates the fields and controls on the Unsafe Item Table DEU page. You can find definitions for the fields and controls later on this page.

**Unsafe Item Table DEU**

Unsafe Item   U1

Details

| 
 << < 1 of 1 > >> 
 View All

\*Effective Date

05/21/2020

\*Status

Active

Unsafe Item Class

3

Short Description

STY

\*Description

Strychnine

Description

Colorless crystalline alkaloid used as a pesticide, particularly for killing small vertebrates, such as rodents.

| <b>Field or Control</b>  | <b>Description</b>                                                                                                   |
|--------------------------|----------------------------------------------------------------------------------------------------------------------|
| <b>Unsafe Item</b>       | The unsafe item code that you entered appears in this field. This code is used on the Injury Details - Details page. |
| <b>Unsafe Item Class</b> | Associate the unsafe item with an unsafe item class by selecting from the list of available options.                 |

Work Area Class Table DEU Page or Work Area Class DEU Page

Use the Work Area Class Table DEU (or Work Area Class DEU) page (HS\_WA\_CLS\_TBL\_GER) to set up work area classes as defined by the employer's liability insurance association.

Navigation:

- Set Up HCM > Product Related > Workforce Monitoring > Health and Safety > Work Area Class Table DEU > Work Area Class Table DEU
- Workforce Monitoring > Health and Safety > Define Accident/Injury Info > Work Area Class DEU > Work Area Class DEU

This example illustrates the fields and controls on the Work Area Class Table DEU page. You can find definitions for the fields and controls later on this page.

Work Area Class Table DEU

Work Area Class

WC1

Details

Q

|

1 of 1

View All

\*Effective Date

05/21/2020

\*Status

Active

+ -

\*Description

Slightly Dangerous

Comments

Assembly Line

| Field or Control | Description                                                                                                                                  |
|------------------|----------------------------------------------------------------------------------------------------------------------------------------------|
| Work Area Class  | The work area class code that you entered appears in this field. Use the work area class code to set up work area categories and work areas. |

Work Area Category Table DEU Page or Work Area Category DEU Page

Use the Work Area Category Table DEU (or Work Area Category DEU) page (HS\_WA\_CTG\_TBL\_GER) to set up work area categories as defined by the employer's liability insurance association.

Navigation:

- Set Up HCM > Product Related > Workforce Monitoring > Health and Safety > Work Area Category Table DEU > Work Area Category Table DEU
- Workforce Monitoring > Health and Safety > Define Accident/Injury Info > Work Area Category DEU > Work Area Category DEU

This example illustrates the fields and controls on the Work Area Category Table DEU page. You can find definitions for the fields and controls later on this page.

**Work Area Category Table DEU**

Work Area Category    WAC1

Details
 
 |
 
 View All

\*Effective Date

05/21/2020

\*Status

Active

+

-

\*Description

Facilities

Work Area Class

WC1

Slightly Dangerous

Description

Bonn plant facilities

| Field or Control   | Description                                                                                |
|--------------------|--------------------------------------------------------------------------------------------|
| Work Area Category | The work area category code that you entered appears in this field.                        |
| Work Area Class    | To associate this work area category with a work area class, select the appropriate value. |

## Work Area Table DEU Page or Work Area DEU Page

Use the Work Area Table DEU (or Work Area DEU) page (HS\_WA\_TBL\_GER) to set up work areas as defined by the employer's liability insurance association.

Navigation:

- Set Up HCM > Product Related > Workforce Monitoring > Health and Safety > Work Area Table DEU > Work Area Table DEU
- Workforce Monitoring > Health and Safety > Define Accident/Injury Info > Work Area DEU > Work Area DEU

This example illustrates the fields and controls on the Work Area Table DEU page. You can find definitions for the fields and controls later on this page.

Work Area Table DEU

Work Area BN02

Details

1 of 1

View All

\*Effective Date

05/21/2020

\*Status

Active

\*Description

Bonn Manufacturing Plant

Work Area Class

WC1

Slightly Dangerous

Work Area Category

WAC1

Facilities

Description

| Field or Control                       | Description                                                                                                                                                                                         |
|----------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Work Area                              | The work area code that you entered appears in this field. This code is used on the Injury Notification Details - Germany page.                                                                     |
| Work Area Class and Work Area Category | To associate this work area with a work area class and a work area category, select the appropriate values. These values come from the Work Area Class and Work Area Category tables, respectively. |

Coop Society Data Page

Use the Coop Society Data page (HS\_COOP\_SOC\_GER) to associate an insurer's industrial hazard code with an employee.

Navigation:

Workforce Monitoring > Health and Safety > Details DEU > Coop Society Data > Coop Society Data

This example illustrates the fields and controls on the Coop Society Data page. You can find definitions for the fields and controls later on this page.

Coop Society Data

Heiner Breit-Gossmann

Employee

Empl ID KD0001

Empl Record 0

Details

1 of 1

View All

Effective Date10/01/1999

Hazard

Description

| Field or Control | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Hazard           | <div>Select a hazard code. You can select from the hazards that were previously entered for this employee's setID and department on the Department Table - Profile page.</div> <div><b>Note:</b> Remember that hazards are first established in the GER Accident Insurance table. Hazards are then associated with a setID and department on the Department Table - Profile page.</div> <div>The accident insurance code and description for this employee's setID and department appear to the right of the Hazard field. This information comes from the Department Table - Profile page.</div> |

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

To set up reporting to the HSE in the United Kingdom, use the External Scheme GBR (HS\_EXT\_SCHEME\_UK) component.

This section describes how to establish the codes that you need to track and report health and safety incidents to the Health and Safety Executive (HSE) under RIDDOR (Reporting of Injuries, Diseases and Dangerous Occurrences Regulations).

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

| <i>Page Name</i>                | <i>Definition Name</i> | <i>Usage</i>                                                                                                                                                                                                                                                                             |
|---------------------------------|------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <u>External Scheme GBR Page</u> | HS_EXT_SCHEME_UK       | Maintain an External Scheme. RIDDOR incident reports must indicate whether the individual involved is part of an External Scheme, which is a vocational training, education, or job placement program usually involving a contract between an employee, an employer, and the government. |

### External Scheme GBR Page

Use the External Scheme GBR page (HS\_EXT\_SCHEME\_UK) to maintain an External Scheme.

RIDDOR incident reports must indicate whether the individual involved is part of an External Scheme, which is a vocational training, education, or job placement program usually involving a contract between an employee, an employer, and the government.

Navigation:

- **Set Up HCM > Product Related > Workforce Monitoring > Health and Safety > External Scheme Table GBR > External Scheme GBR**
- **Workforce Monitoring > Health and Safety > Define Accident/Injury Info > External Scheme GBR > External Scheme GBR**

This example illustrates the fields and controls on the External Scheme GBR page. You can find definitions for the fields and controls later on this page.

**External Scheme GBR**

External Scheme    EWK

Details
 1 of 1
View All

\*Effective Date

05/21/2020

\*Status

Active

+ -

\*Description

Short Description

Scheme Type

☐ Training Scheme
 ☐ Work Experience

| <i>Field or Control</i> | <i>Description</i>                                                                                              |
|-------------------------|-----------------------------------------------------------------------------------------------------------------|
| <b>External Scheme</b>  | The external scheme code that you entered appears in this field. Use this field on the Employment Details page. |

| <b><i>Field or Control</i></b> | <b><i>Description</i></b>                                                                                                 |
|--------------------------------|---------------------------------------------------------------------------------------------------------------------------|
| <b>Scheme Type</b>             | Select the appropriate option to indicate whether the scheme type is a <b>Training Scheme</b> or <b>Work Experience</b> . |



# Chapter 4

# Tracking Personal Data for People Involved in Incidents

## Entering Non-Employee Data

This section discusses how to enter non-employee data.

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

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

## Pages Used to Enter Non-Employee Data

| <i>Page Name</i>                                    | <i>Definition Name</i> | <i>Usage</i>                                                                                                                                          |
|-----------------------------------------------------|------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------|
| <u>Non-Employee Details - Name Page</u>             | HS_NON_EMPL1           | Maintain name information for non-employees involved in incidents.                                                                                    |
| Non-Employee Details - Address                      | HS_NON_EMPL1B          | Maintain address information for non-employees involved in incidents.                                                                                 |
| <u>Non-Employee Details - Personal Details Page</u> | HS_NON_EMPL2           | Maintain additional details for the individual.                                                                                                       |
| <u>Non-Employee Details - Extra Details Page</u>    | HS_NE_PERS_DATA        | Maintain extra address information for the individual. This information is required if the individual does not live at a normally recognized address. |

## Non-Employee Details - Name Page

Use the Non-Employee Details - Name page (HS\_NON\_EMPL1) to maintain name information for non-employees involved in incidents.

Navigation:

**Workforce Monitoring > Health and Safety > Verify Persnnl Invlvd/Witnessd > Non-Employee Details > Name**

This example illustrates the fields and controls on the Non-Employee Details - Name page. You can find definitions for the fields and controls later on this page.

| Name                                                                                                                                                                        | Address | Personal Details | Extra Details |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------|------------------|---------------|
| <p><b>Non-Empl ID</b> 00000000001</p> <p><b>*Name Format</b> English <input type="button" value="v"/> <a href="#">Edit Name</a></p> <p><b>Display Name</b> Henry Gerald</p> |         |                  |               |

| Field or Control                     | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|--------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Non-Empl ID</b> (non-employee ID) | <p>The non-employee ID that you entered appears in this field.</p> <p>The system automatically assigns the non-employee ID as the number immediately following the one that is in the Last Non-Employee ID Assigned field in the Installation Table. The number first appears as 00000000000. The actual number assigned to the person appears after you save the information that you enter. Or, you can enter the number manually.</p> <hr/> <p><b>Warning!</b> To avoid maintaining two different sets of non-employee IDs, PeopleSoft recommends that you either always assign numbers manually or always let the system do it.</p> <hr/> |

## Non-Employee Details - Personal Details Page

Use the Non-Employee Details - Personal Details page (HS\_NON\_EMPL2) to maintain additional details for the individual.

Navigation:

**Workforce Monitoring > Health and Safety > Verify Persnnl Invlvd/Witnessd > Non-Employee Details > Personal Details**

This example illustrates the fields and controls on the Non-Employee Details - Personal Details page. You can find definitions for the fields and controls later on this page.

NameAddressPersonal DetailsExtra Details

Gerald, Henry TheodoreNon-Empl ID0000000001

Birthdate

Date of Death

Business Title

Employer

Business UnitGBIBUGlobal Business Institute BU

Department

Supervisor ID

Gender

Male

Female

Unknown

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

Non-Employee Details - Extra Details Page

Use the Non-Employee Details - Extra Details page (HS\_NE\_PERS\_DATA) to maintain extra address information for the individual.

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

Navigation:

Workforce Monitoring > Health and Safety > Verify Persnnl Invlvd/Witnessd > Non-Employee Details > Extra Details

This example illustrates the fields and controls on the Non-Employee Details - Extra Details page. You can find definitions for the fields and controls later on this page.

| Name                              | Address                | Personal Details | Extra Details           |
|-----------------------------------|------------------------|------------------|-------------------------|
| Name                              | Gerald, Henry Theodore |                  | Non-Empl ID 00000000001 |
| <b>Extra Address Information</b>  |                        |                  |                         |
| <div><div></div><div></div></div> |                        |                  |                         |
| <div><div></div><div></div></div> |                        |                  |                         |

Canada

|               |                      |                                                    |                      |
|---------------|----------------------|----------------------------------------------------|----------------------|
| Street Number | <input type="text"/> | Street Name                                        | <input type="text"/> |
| Unit Number   | <input type="text"/> | P.O.Box                                            | <input type="text"/> |
| Rural Route   | <input type="text"/> | <input type="button" value="Get Default Address"/> |                      |

| <i><b>Field or Control</b></i>   | <i><b>Description</b></i>                                                       |
|----------------------------------|---------------------------------------------------------------------------------|
| <b>Extra Address Information</b> | Enter extra information about the individual's address in this free-form field. |

**(CAN) Canada**

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

| <i><b>Field or Control</b></i>       | <i><b>Description</b></i>                                                                                                                                                                                                      |
|--------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Street Number and Street Name</b> | Enter values. If street number and street name information already exists in the system for this non-employee, then click the <b>Get Default Address</b> button, and that information is automatically populated on this page. |
| <b>Unit Number</b>                   | Enter additional address details.                                                                                                                                                                                              |

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

---

**Warning!** For British Columbia WCB Electronic Data Interchange (EDI) reporting, information on this additional address page is necessary to create the appropriate EDI records. The absence of this information causes the file to fail WCB's mainframe computer editing checks.

---

## Entering Employee Data

This section discusses how to enter employee data.

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

### Pages Used to Enter Employee Data

| <i>Page Name</i>                        | <i>Definition Name</i> | <i>Usage</i>                                                                                                                                                                                  |
|-----------------------------------------|------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <u>Additional Employee Details Page</u> | HS_PERS_DATA           | Enter extra address information for employees who are involved in health and safety incidents. This information is required if the individual does not live at a normally recognized address. |
| <u>Employment Page</u>                  | HS_EMPLOYMENT          | Enter additional employment details for employees in Canadian and United Kingdom operations who are involved in health and safety incidents.                                                  |

### Additional Employee Details Page

Use the Additional Employee Details page (HS\_PERS\_DATA) to enter extra address information for employees who are involved in health and safety incidents.

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

Navigation:

**Workforce Monitoring > Health and Safety > Verify Persnvl Involvd/Witnessd > Additional Employee Details > Additional Employee Details**

This example illustrates the fields and controls on the Additional Employee Details page. You can find definitions for the fields and controls later on this page.

### Additional Employee Details

Isabella Maria Amme

Person ID KD0002

#### Extra Address Information

Canada

Street Number

Street Name

Unit Number

P.O.Box

Rural Route

Get Default Address

Germany

Social Insurance Provider

Case Officer

| Field or Control          | Description                                                                     |
|---------------------------|---------------------------------------------------------------------------------|
| Extra Address Information | Enter extra information about the individual's address in this free-form field. |

### (CAN) Canada

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

### (DEU) Germany

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

| Field or Control          | Description                                                                                                     |
|---------------------------|-----------------------------------------------------------------------------------------------------------------|
| Social Insurance Provider | Select the name of the employee's social insurance provider. Valid values come from the Social Insurance Table. |

| <b>Field or Control</b> | <b>Description</b>                                                               |
|-------------------------|----------------------------------------------------------------------------------|
| <b>Case Officer</b>     | Select the check box to indicate whether the employee is a company case officer. |

## Employment Page

Use the Employment page (HS\_EMPLOYMENT) to enter additional employment details for employees in Canadian and United Kingdom operations who are involved in health and safety incidents.

Navigation:

**Workforce Monitoring > Health and Safety > Verify Persnnl Involvd/Witnessd > Witness Employment Information > Employment**

This example illustrates the fields and controls on the Employment page (1 of 2). You can find definitions for the fields and controls later on this page.

### Employment

Gary Mathews

EMP

ID CFA0007

Empl Record 0

Business Title

Canada

#### Employment

Regulatory Region

Industry Start Date

Occupation Code

Occupational Category

Job Available Months

☒ Employment Secure

#### Relationship

☐ Partner

☐ Principal

☐ Relative

Worker Relationship

This example illustrates the fields and controls on the Employment page (2 of 2). You can find definitions for the fields and controls later on this page.

The screenshot shows a web form titled "Category". Inside the form, there is a "Worker Category" dropdown menu. Below it, there are several checkboxes: "Full Time", "Permanent", "Seasonal", "Volunteer", "Casual", "Subcontractor", and "Student". To the right of these checkboxes is a "Seasonal End Dt" text field. Below the checkboxes is an "Employment Details" text field with a small icon to its right. At the bottom of the form, there is a "United Kingdom" dropdown menu with a flag icon, and an "External Scheme" text field with a search icon.

## (CAN) Canada

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

## Employment

| <i>Field or Control</i>      | <i>Description</i>                                                                                                                                                      |
|------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Regulatory Region</b>     | Enter a regulatory region for the employee. The Occupational Category and Worker Category fields on this page only if you select a value of <i>CANBC</i> in this field. |
| <b>Industry Start Date</b>   | Enter the date on which the employee started working in the industry.                                                                                                   |
| <b>Occupation Code</b>       | Enter the code for the employee's occupation.                                                                                                                           |
| <b>Occupational Category</b> | Select an occupational category of <i>NONE OF THE ABOVE</i> .                                                                                                           |
| <b>Job Available Months</b>  | If the employee is returning to a job with a time limit, then use this field to indicate how many months the job is available.                                          |
| <b>Employment Secure</b>     | Select this check box to indicate that the employee has a job in which to return.                                                                                       |



## Relationship

| <i>Field or Control</i>    | <i>Description</i>                                                                                                                                                           |
|----------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Partner</b>             | Select if the employee is a partner of another employee.                                                                                                                     |
| <b>Principal</b>           | Select if the employee is a principal of another employee.                                                                                                                   |
| <b>Relative</b>            | Select if the employee is a relative of another employee.                                                                                                                    |
| <b>Worker Relationship</b> | If any of the <b>Relationship</b> boxes are selected, then fully explain those relationships in this free-form field. This information is required for reporting to the WCB. |

## Category

| <i>Field or Control</i>                                                              | <i>Description</i>                                                                                                                                                                                                                                                          |
|--------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Worker Category</b>                                                               | Select the worker category for the employee. Values are <i>CASUAL</i> , <i>PERMANENT</i> , <i>PERSONAL OPTIONAL PROTECTION</i> , <i>PRINCIPAL OR RELATIVE OF PRINCIPAL</i> , <i>SELF-EMPLOYED (LABOUR CONTRACTOR W/O POP)</i> , and <i>WORKER CATEGORY NOT APPLICABLE</i> . |
| <b>Full Time, Permanent, Seasonal, Volunteer, Casual, Subcontractor, and Student</b> | Indicate the employee's employment category by selecting from the appropriate check boxes.                                                                                                                                                                                  |
| <b>Employment Details</b>                                                            | This field is used with the Subcontractor category only. Describe the role of the subcontractor.                                                                                                                                                                            |
| <b>Seasonal End Dt</b> (seasonal end date)                                           | If this is a seasonal employee, indicate the end date of their employment. This field is not available for entry unless you select the <b>Seasonal</b> check box.                                                                                                           |

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

## (GBR) United Kingdom

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

| <b>Field or Control</b> | <b>Description</b>                                                                                       |
|-------------------------|----------------------------------------------------------------------------------------------------------|
| <b>External Scheme</b>  | Select a scheme code from the available options. The values come from the UK External Scheme Table page. |

## Maintaining and Reviewing Employee Health Card Information

This section discusses how to record and review employee health details.

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

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

### Pages Used to Maintain and Review Employee Health Cards

| <b>Page Name</b>          | <b>Definition Name</b> | <b>Usage</b>                                                                |
|---------------------------|------------------------|-----------------------------------------------------------------------------|
| Health Card 1 page        | GVT_HEALTH_CARD_1      | Record physician contact information for employees.                         |
| <u>Health Card 2 Page</u> | GVT_HEALTH_CARD_2      | Record drug allergies, specific test names, and dates for employees.        |
| Health Card Review 1 Page | GVT_HEALTH_RVW_1       | Review personal data for employees.                                         |
| Health Card Review 2 Page | GVT_HEALTH_RVW_2       | Review position information for employees.                                  |
| Health Card Review 3 Page | GVT_HEALTH_CARD_1      | Review physician contact information for employees.                         |
| Health Card Review 4 Page | GVT_HEALTH_CARD_2      | Review any drug allergies, specific test names, and dates for employees.    |
| Drug Test Review Page     | GVT_DRUG_TEST2         | Review drug test results, referrals, and comments for employees.            |
| Hs Exam Audio1 Page       | HS_EXAM_AUDIO1         | Review basic appointment and physician contact information for audio exams. |

| <b>Page Name</b>                              | <b>Definition Name</b> | <b>Usage</b>                                                                      |
|-----------------------------------------------|------------------------|-----------------------------------------------------------------------------------|
| Hs Exam Audio2 Page                           | HS_EXAM_AUDIO2         | Review audiometric exam results, referrals, and comments for employees.           |
| Hs Exam Eye1 Page                             | HS_EXAM_EYE1           | Review basic appointment and physician contact information for eye exams.         |
| Hs Exam Eye2 Page                             | HS_EXAM_EYE2           | Review eye exam results, referrals, and comments for employees.                   |
| Hs Exam Physical1 page                        | HS_EXAM_PHYSICAL1      | Review basic appointment and physician contact information for physical exams.    |
| Hs Exam Physical2                             | HS_EXAM_PHYSICAL2      | Review physical exam results, referrals, and comments for employees.              |
| Hs Exam Respire1 (Hs exam respiratory 1) page | HS_EXAM_RESPIRE1       | Review basic appointment and physician contact information for respiratory exams. |
| Hs Exam Respire2 (Hs exam respiratory 2) page | HS_EXAM_RESPIRE2       | Review respiratory exam results, referrals, and comments for employees.           |

## Related Links

[Tracking Employee Medical Exam Results](#)

## Health Card 2 Page

Use the Health Card 2 page (GVT\_HEALTH\_CARD\_2) to record drug allergies, specific test names, and dates.

Navigation:

**Workforce Monitoring > Health and Safety > Record Medical Exam Results > Employee Health Card > Health Card 2**

This example illustrates the fields and controls on the Health Card 2 page (1 of 3). You can find definitions for the fields and controls later on this page.

Health Card 1

Health Card 2

Gary Mathews

Person ID CFA0007

Drug Sensitivities

Data

Q

1-1 of 1

|   | *Drug Name           |   |   |
|---|----------------------|---|---|
| 1 | <input type="text"/> | + | - |

Previous Tests Administered

Data

Q

1-1 of 1

|   | *Test Date           | *Test Name           |   |   |
|---|----------------------|----------------------|---|---|
| 1 | <input type="text"/> | <input type="text"/> | + | - |

This example illustrates the fields and controls on the Health Card 2 page (2 of 3). You can find definitions for the fields and controls later on this page.

Allergy Details

Q

1-1 of 1

View All

\*Regulatory Region

USA

United States

+

-

Data

Q

1-1 of 1

|   | *Allergy Code        | Description | *Start Date          | End Date             | Comments             |   |   |
|---|----------------------|-------------|----------------------|----------------------|----------------------|---|---|
| 1 | <input type="text"/> |             | <input type="text"/> | <input type="text"/> | <input type="text"/> | + | - |

Immunization Details

Q

1-1 of 1

View All

\*Regulatory Region

USA

United States

+

-

Data

Q

1-1 of 1

This example illustrates the fields and controls on the Health Card 2 page (3 of 3). You can find definitions for the fields and controls later on this page.

Medication Details

Regulatory Region

USA

United States

Data

|   | *Medication Code | Description | *Start Date | End Date | Comments |   |   |
|---|------------------|-------------|-------------|----------|----------|---|---|
| 1 |                  |             |             |          |          | + | - |

Disease Details

Regulatory Region

USA

United States

Data

|   | *Disease Code | Description | Start Date | End Date | Comments |   |   |
|---|---------------|-------------|------------|----------|----------|---|---|
| 1 |               |             |            |          |          | + | - |

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

**Note:** To review health card data, including drug test, audiometric, eye, physical, and respiratory exam data, use the Record Medical Exam Results, Review Health Card Info component.

## Entering Family Details

This section discusses how to set up family information.

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

### Page Used to Set Up Family Information

| Page Name               | Definition Name | Usage                                                                                                                    |
|-------------------------|-----------------|--------------------------------------------------------------------------------------------------------------------------|
| Family Information Page | HS_FAMILY       | Enter additional family information for employees or for non-employees who are involved in a health and safety incident. |

### Family Information Page

Use the Family Information page (HS\_FAMILY) to enter additional family information for employees or for non-employees who are involved in a health and safety incident.

Navigation:

## Workforce Monitoring > Health and Safety > Verify Persnnl Invlvd/Witnessd > Family Information > Family Information

This example illustrates the fields and controls on the Family Information page. You can find definitions for the fields and controls later on this page.

**Family Information**

Employee ID KC0005 Catherine Moore  
Next Of Kin Moore,Jeremy

**Family Details**

|   | *Name        | *Date of Birth | In School                           | Training                 |   |   |
|---|--------------|----------------|-------------------------------------|--------------------------|---|---|
| 1 | Moore,Jeremy | 02/02/1985     | <input checked="" type="checkbox"/> | <input type="checkbox"/> | + | - |

Children Aged Under 18 0  
Children 18 - 25 In Education 0

| Field or Control                     | Description                                                                                                                                                                                                                 |
|--------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Next of Kin</b>                   | Enter the name of the individual's next of kin using the standard PeopleSoft naming format (Last,First).                                                                                                                    |
| <b>Date of Birth</b>                 | Enter the birthdates of any children.                                                                                                                                                                                       |
| <b>In School</b>                     | Select this check box to indicate that the child is a student.                                                                                                                                                              |
| <b>Training</b>                      | <p>Select this check box to indicate that the child is receiving training.</p> <hr/> <p><b>Note:</b> <b>In School</b> and <b>Training</b> information is sometimes needed for reporting purposes.</p> <hr/>                 |
| <b>Children Aged Under 18</b>        | Based upon the birthdate values and check boxes that you entered and selected, the system automatically calculates and displays the number of children under 18 years of age.                                               |
| <b>Children 18 - 25 In Education</b> | Based upon the birth date values and check boxes that you entered and selected, the system automatically calculates and displays the number of children aged 18-25 who are either studying in school or receiving training. |

## Chapter 5

# Creating and Tracking Incidents

---

## Understanding Health and Safety Incidents

This section discusses:

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

### New Incident Entry

Use the injury and illness pages to track an organization's response to health and safety incidents. Track employees and non-employees and associate multiple individuals with a single incident.

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

### Incident Numbers

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

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

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

---

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

---

### Incident Reports

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

## Related Links

[Understanding Health and Safety Incidents](#)

# Entering Health and Safety Incident Details

This section discusses how to enter health and safety incident details.

## Pages Used to Enter Health and Safety Incidents

| <b><i>Page Name</i></b>                              | <b><i>Definition Name</i></b> | <b><i>Usage</i></b>                                                                                                                                                                                                                                                                                                 |
|------------------------------------------------------|-------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <a href="#">Incident Details - Incident Page</a>     | HS_INCIDENT                   | Add a new incident or update an existing incident.<br><br>(BRA) Brazilian incidents should be entered using the Incident Details BRA component. In order to enter Brazilian injury details in the Injury Details BRA component, the originating incident must be reported using the Incident Details BRA component. |
| <a href="#">Incident Attachments Page</a>            | HS_INCDT_ATT_FL               | Add new and view uploaded attachments for incidents.                                                                                                                                                                                                                                                                |
| Vehicle/Equipment Accident Details Page              | HS_INCIDENT_SEC               | Enter vehicle and equipment accident details.                                                                                                                                                                                                                                                                       |
| <a href="#">Incident Details - Notification Page</a> | HS_INC_NOTIFY                 | Record incident details that employees generate.                                                                                                                                                                                                                                                                    |
| <a href="#">Incident Details - Description Page</a>  | HS_INC_DESCRIPTION            | Describe the health and safety incident and record related data.                                                                                                                                                                                                                                                    |
| <a href="#">Incident Details - Location Page</a>     | HS_INC_LOCATION               | Identify the location where the incident occurred.                                                                                                                                                                                                                                                                  |
| Incident Location Address                            | HS_INC_LOCADDR_SEC            | Enter the location and address information for those incidents that occur off an organization's premises.                                                                                                                                                                                                           |
| Edit Address                                         | EO_ADDR_USA_SEC               | Edit existing address information that is associated with the incident.                                                                                                                                                                                                                                             |
| <a href="#">Incident Details - Travel Page</a>       | HS_INC_TRAVEL                 | Record travel-related incident details.                                                                                                                                                                                                                                                                             |



| <b><i>Page Name</i></b>                            | <b><i>Definition Name</i></b> | <b><i>Usage</i></b>                                                                                                                                                                                                                                                               |
|----------------------------------------------------|-------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <u>Route Details Page</u>                          | HS_INC_ROUTE_SEC              | Provide additional travel route details for health and safety incidents.                                                                                                                                                                                                          |
| Break Details                                      | HS_INC_BREAK_SEC              | Provide details about breaks in travel that are related to a health and safety incident.                                                                                                                                                                                          |
| Animals Involved In The Incident                   | HS_INC_ANIMAL_SEC             | Enter information about animals that are involved in a health and safety incident.                                                                                                                                                                                                |
| <u>Incident Details - People Page</u>              | HS_INC_PEOPLE                 | Identify witnesses, investigators, and other people who are connected to the incident. These are people who are not injured or ill in the incident.                                                                                                                               |
| Incident Details - People: Contact Address         | HS_INC_PPLADDR_SEC            | Enter address information for the witnesses, investigators, and other contacts from the People page.<br><br>(CAN) Users in British Columbia who report incidents to the BC WCB electronically must provide address information for all persons who are connected to the incident. |
| <u>Incident Details - Reporting Page</u>           | HS_INC_REPORT                 | Maintain documentation showing that you notified the proper authorities of the incident.                                                                                                                                                                                          |
| <u>Incident Details BRA - CAT Information Page</u> | HS_INCIDENT_BRA               | Identify the location where the incident occurred. This information is used in the Work Risk (CAT) report for Brazil                                                                                                                                                              |

## Incident Details - Incident Page

Use the Incident Details - Incident page (HS\_INCIDENT) to add a new incident or update an existing incident.

Navigation:

- **Workforce Monitoring > Health and Safety > Obtain Incident Information > Incident Details > Incident**
- **Workforce Monitoring > Health and Safety > Obtain Incident Information > Incident Details BRA > Incident**

This example illustrates the fields and controls on the Incident Details - Incident page (1 of 3). You can find definitions for the fields and controls later on this page.

**Incident Details**

**Incident** Notification Description Location Travel People Reporting

Incident Number 70000256

**Incident Type**

\*Incident Date01/02/2024

Incident Time

\*Regulatory RegionUSAUnited States

\*Incident TypeIncident

☐ Is This a Recurrence

☒ Resulted in Injury or Illness

☐ Investigated

Time ZonePST

☒ Time Undetermined

**Documentation**

[View Attachments](#)

 **Canada**

**Health And Safety Contact**

Contact ID

This example illustrates the fields and controls on the Incident Details - Incident page (2 of 3). You can find definitions for the fields and controls later on this page.

| Incident |                                              |
|----------|----------------------------------------------|
| Outcome  | <input type="checkbox"/> Date and Time Exact |

| Exposure   |                      |
|------------|----------------------|
| Start Date | <input type="text"/> |
| End Date   | <input type="text"/> |
| Start Time | <input type="text"/> |
| End Time   | <input type="text"/> |

| Disability                                            |                                                       |
|-------------------------------------------------------|-------------------------------------------------------|
| <input type="checkbox"/> Disability Program Available |                                                       |
| Contact ID                                            | <input type="text"/> <input type="button" value="Q"/> |
| Description                                           | <input type="text"/> <input type="button" value="Q"/> |

| Payroll Contact    |                                                       |
|--------------------|-------------------------------------------------------|
| Payroll Contact ID | <input type="text"/> <input type="button" value="Q"/> |

| Other Information                                       |                                                       |
|---------------------------------------------------------|-------------------------------------------------------|
| <input type="checkbox"/> RTW Program Available          |                                                       |
| <input checked="" type="checkbox"/> In WCB Jurisdiction |                                                       |
| Class/Subclass                                          | <input type="text"/> <input type="button" value="Q"/> |
| Business Type                                           | <input type="text"/>                                  |

This example illustrates the fields and controls on the Incident Details - Incident page (3 of 3). You can find definitions for the fields and controls later on this page.

 France

Incident Subtype

☐ Work
☐ Journey
☐ Occupational Illness

Reported By

☐ Employer
☐ Supervisor
☐ Victim

Where

Sign Off By

Police Report

☐ Police Report

Author

Incident Status

☐ Definite
☐ Known

Internal Investig Conclusions

 Mexico

☐ Detected by Mixed Committee

 India

Incident Subtype

☒ Work
☐ Journey
☐ Occupational Disease/Illness
☐ Other

| <b><i>Field or Control</i></b>     | <b><i>Description</i></b>                                                                                                                                                                          |
|------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Incident Number</b>             | The incident number that you entered appears here.                                                                                                                                                 |
| <b>Incident Date</b>               | The default value is today's date, which you can change.                                                                                                                                           |
| <b>Incident Time and Time Zone</b> | <p>Enter the time that the incident occurred, and the time zone for that time.</p> <p>If you are unsure of the time that the incident occurred, select the <b>Time Undetermined</b> check box.</p> |
| <b>Time Undetermined</b>           | Select if you cannot determine the time the incident occurred.                                                                                                                                     |

| <b>Field or Control</b>              | <b>Description</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|--------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Regulatory Region</b>             | <p>Enter the regulatory region for the incident. When you add an incident, the user's regulatory region that is specified in user preferences appears by default. You can override this value.</p> <hr/> <p><b>Note:</b> This field controls the values that are returned by all of the Monitoring Health and Safety setup tables that use setID as their key field.</p> <hr/> <p><b>Warning!</b> If you change the regulatory region for an existing incident, and the setID for the previous and current regulatory regions differ, the system deletes all of the relevant linked values from the setup tables. Before proceeding with the change, the system prompts you to confirm the action. When the original information is deleted, you must reenter the data for the incident.</p> <hr/> |
| <b>Incident Type</b>                 | <p>Select the type of the incident. The default value is <i>Incident</i>, which you can change. The selected value controls the availability of other fields that are in the component.</p> <p>If you file incident reports electronically with the BC WCB, leave the default value of <i>Incident</i> if you report an outcome of reported only, health care only, short term disability, or fatality. If you report an incident outcome of dangerous occurrences, select <i>Dangerous Occurrence</i>.</p>                                                                                                                                                                                                                                                                                        |
| <b>Details</b>                       | <p>If you select <i>Vehicle/Equipment Accident</i>, the Details link appears. Click this link to access the Vehicle/Equipment Accident Details page (HS_INCIDENT_SEC).</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>Is This a Recurrence</b>          | <p>Select if this incident has happened before.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| <b>Resulted in Injury or Illness</b> | <p>Select if the incident resulted in injury or illness and you want to track injury or illness data on the Injury or Illness pages.</p> <p>When you select this check box, enter an employee ID in the Reported to Empl ID (reported to employee ID) field on the Notification page before saving the incident in the system.</p> <p>For BC WCB reports, select this check box if you are reporting an outcome of reported only, health care only, short-term disability, or fatality. If you are reporting an outcome of dangerous occurrences, ensure that this check box is deselected.</p>                                                                                                                                                                                                    |
| <b>Investigated</b>                  | <p>Select this check box if this incident is investigated.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |

**Note:** (DEU) German laws and insurers require that employers track and report detailed occupational illness data. The legal procedures for handling and reporting these illnesses differ from those that regulate occupational accidents, so all illnesses involving the German operations are tracked using the Illness Tracking (HS\_ILLNESS\_GER) component.

## Documentation

| <b>Field or Control</b> | <b>Description</b>                                                                                                                                                               |
|-------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Add Attachments</b>  | Select to attach new files to the incident on the <a href="#">Incident Attachments Page</a> . This link appears if the incident does not have any attachments.                   |
| <b>View Attachments</b> | Select to attach new files or view files already uploaded for the incident on the <a href="#">Incident Attachments Page</a> . This link appears if the incident has attachments. |

## (CAN) Canada

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

---

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

---

| <b>Field or Control</b>             | <b>Description</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|-------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Outcome</b>                      | <p>The value that appears in this field is derived from the most severe injury outcome that you enter on the Injury Details page.</p> <p>For incidents with a CANBC regulatory region, the Outcome field is activated based upon a relationship between the incident outcome here and the injury outcome. If the <b>Resulted in Injury or Illness</b> check box is selected, the system verifies that an injury is entered before you save the incident.</p> <p>When you save the incident, the system associates an incident outcome with each injury outcome. For example, if only one person is injured, the system populates the Outcome field with the same value as the injury outcome. If more than one person is injured, the most severe injury outcome defines the incident outcome.</p> <p>Possible values for the Outcome field are:</p> <p><i>Reported Only:</i> An injury occurred but no medical attention is sought nor is time lost.</p> <p><i>Healthcare Only:</i> The injured person visited a health-care practitioner, but no time loss beyond the day of injury occurred. In some WCB jurisdictions, this is also known as medical aid.</p> <p><i>Short Term Disability:</i> The injured worker is off work beyond the day of the injury. In some WCB jurisdictions, this is also known as wage loss.</p> <p><i>Fatal:</i> A fatal injury.</p> <p><i>Dangerous Occurrence:</i> No injuries or injury outcomes are involved.</p> |
| <b>Date and Time Exact</b>          | Select to indicate that the date and time on the primary page are exact.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>Exposure</b>                     | If you select the exposure incident type on the primary page, enter the exposure start date and time and end date and time, if they're known.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>Disability Program Available</b> | Select if there is a disability program available at the organization.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |

| <b>Field or Control</b>                                         | <b>Description</b>                                                                                                                                                                |
|-----------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Contact ID</b> (Disability)                                  | You must select the <b>Disability Program Available</b> check box to use this field.                                                                                              |
| <b>Description</b> (description)                                | You must select the <b>Disability Program Available</b> check box to use this field.                                                                                              |
| <b>Payroll Contact ID</b>                                       | Enter the payroll contact ID for the incident.                                                                                                                                    |
| <b>RTW Program Available</b> (return to work program available) | Select to indicate if there is a return-to-work program available at the organization.                                                                                            |
| <b>In WCB Jurisdiction</b>                                      | Select to indicate if the business operation that is involved is in the WCB jurisdiction.                                                                                         |
| <b>Class/Subclass</b>                                           | Enter the industry class or subclass code.<br><br>Define the standard industry classes and subclasses for the Canadian business locations on the Class/Subclass Table - CAN page. |

### (FRA) France

| <b>Field or Control</b>                                                   | <b>Description</b>                                                                               |
|---------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------|
| <b>Where</b>                                                              | Indicate where the incident is reported.                                                         |
| <b>Sign Off By</b>                                                        | Enter the employee ID of the person who approved and signed the internal company written report. |
| <b>Police Report</b>                                                      | Select if a police report is prepared.                                                           |
| <b>Author</b>                                                             | Identify the author of the police report.                                                        |
| <b>Internal Investig Conclusions</b> (internal investigation conclusions) | Describe the conclusions of the internal investigation.                                          |



**(MEX) Mexico**

| <i>Field or Control</i>            | <i>Description</i>                                                                                                                                                                   |
|------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Detected by Mixed Committee</b> | Select if the incident is detected by the Health and Safety mixed committee.                                                                                                         |
| <b>Mixed Committee</b>             | Select the name of the mixed committee. This field appears only if you select the <b>Detected by Mixed Committee</b> check box. Define mixed committees on the Mixed Committee page. |

**(IND) India**

Indicate the incident subtype.

**Related Links**

“Understanding Regulatory Regions” (Application Fundamentals)

**Incident Attachments Page**

Use the Incident Attachments page (HS\_INCDT\_ATT\_FL) to add new and view uploaded attachments for incidents.

Navigation:

Select the **Add Attachments** or **View Attachments** link on the Incident Details - Incident page.

This example illustrates the fields and controls on the Incident Attachments page.

Incident Attachments

Save

Attach any files (for example, medical documents, pictures, or videos) that pertain to the incident.

Incident Details

Incident Number 70000256

Incident Date 01/02/2024

Incident Type Incident

Incident Attachments

Add Attachment

| Attachments <small>↑↓</small> | Description <small>↑↓</small> | Attached By <small>↑↓</small> | Attached On <small>↑↓</small> |
|-------------------------------|-------------------------------|-------------------------------|-------------------------------|
| Doc_Note.docx                 | Doc note Physical Therapy     | Betty Locherty                | 01/11/24 12:58:49 PM          |
| Doc_Note.docx                 | Doc note ER                   | Rosanna Channing              | 01/11/24 01:12:40 PM          |

2 rows

Video: [Image Highlights, PeopleSoft HCM Update Image 49: View Health & Safety Incident Attachments](#)

| <b>Field or Control</b> | <b>Description</b>                                                                                                                                                                                                                                                |
|-------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Add Attachment</b>   | Select the button to upload a file for the specified incident.<br><br>See Also “File Attachments and Attachment Pages” (Application Fundamentals).                                                                                                                |
| <b>Attachments</b>      | Select a link to save the uploaded file.<br><br>As a Health and Safety administrator, you can view files that were uploaded by you, the employee or other administrators. You can also remove the files and edit the descriptions of the files that you uploaded. |

## Incident Details - Notification Page

Use the Incident Details - Notification page (HS\_INC\_NOTIFY) to record incident details that employees generate.

Navigation:

- **Workforce Monitoring > Health and Safety > Obtain Incident Information > Incident Details > Notification**
- **Workforce Monitoring > Health and Safety > Obtain Incident Information > Incident Details BRA > Notification**

This example illustrates the fields and controls on the Incident Details - Notification page. You can find definitions for the fields and controls later on this page.

|          |                     |             |          |        |        |           |
|----------|---------------------|-------------|----------|--------|--------|-----------|
| Incident | <b>Notification</b> | Description | Location | Travel | People | Reporting |
|----------|---------------------|-------------|----------|--------|--------|-----------|

|                 |          |      |            |               |          |
|-----------------|----------|------|------------|---------------|----------|
| Incident Number | 19120001 | Date | 01/01/2009 | Incident Type | Exposure |
|-----------------|----------|------|------------|---------------|----------|

**Incident Notification**

|                         |            |               |
|-------------------------|------------|---------------|
| Date Reported           | 01/09/2009 |               |
| Time Reported           | 9:00AM     |               |
| Reported To Empl ID     | KC0026     | Carol Johnson |
| Reported By Empl ID     | KC0017     | Jessica Brown |
| Reported By Non-Empl ID |            |               |

**Incident Tracking**

|               |            |  |
|---------------|------------|--|
| Date Recorded | 01/09/2009 |  |
| Time Recorded | 9:00AM     |  |

| <b>Field or Control</b>                                                                                               | <b>Description</b>                                                                                                                                      |
|-----------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Date Reported</b> and <b>Time Reported</b>                                                                         | Enter the date and time that the incident is reported to a company official or employee.                                                                |
| <b>Reported To Empl ID</b> (reported to employee ID)                                                                  | Enter the employee ID of the organization official or employee who received the report, or select from the list of values that come from personal data. |
| <b>Reported By Empl ID</b> (reported by employee ID) and <b>Reported By Non-Empl ID</b> (reported by non-employee ID) | Enter an ID for the employee or non-employee who reported the incident.                                                                                 |

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

| <b>Field or Control</b>  | <b>Description</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|--------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Incident Tracking</b> | <p>Use this group box for recording purposes. For example, track when the incident report or notification is first documented by an organization official in writing. In this example, you enter the date recorded and time recorded to track this information internally.</p> <p>You can also use this field to track another date, for example, the date that preexisting conditions began or the date when the employee began missing work. Alternatively, you can track the date that an internal report, note, or memorandum is written to document the incident. For users who are in the United States subject to Occupational Safety and Health Administration (OSHA) regulations, the date recorded might represent the date that the incident is first entered into the PeopleSoft system.</p> |

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

## Incident Details - Description Page

Use the Incident Details - Description page (HS\_INC\_DESCRIPTION) to describe the health and safety incident and record related data.

Navigation:

- **Workforce Monitoring > Health and Safety > Obtain Incident Information > Incident Details > Description**
- **Workforce Monitoring > Health and Safety > Obtain Incident Information > Incident Details BRA > Description**

This example illustrates the fields and controls on the Incident Details - Description page. You can find definitions for the fields and controls later on this page.

Incident

Notification

Description

Location

Travel

People

Reporting

Incident Number

19120001

Date

01/01/2009

Incident Type

Exposure

Dangerous Occurrence

Code

NULL

Description

Gas pipeline erupted on property.

Canada

Near Miss Type

Release of Toxic or Hazardous

☐ Worker Involved?

Data

1-1 of 1

View All

| Contrib Factor   | Description | Other Description |              |              |
|------------------|-------------|-------------------|--------------|--------------|
| <div>00996</div> | OTHER       |                   | <div>+</div> | <div>-</div> |

India

☐ Alcohol/Substance Taken

| Field or Control | Description                                                                                                                                                                                                                                                                                           |
|------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Code             | For most incident types, this field is unavailable. When the incident type that you selected on the Incident page is <i>dangerous occurrence</i> , the system makes the <b>Code</b> field available for entry. The codes from which you can select a value come from the Dangerous Occurrences table. |

(CAN) Canada

| Field or Control | Description                                                      |
|------------------|------------------------------------------------------------------|
| Near Miss Type   | Specify the type of near miss that occurred during the incident. |
| Worker Involved? | Select to indicate that a worker was involved in the incident.   |

| <b>Field or Control</b>                     | <b>Description</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|---------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Contrib Factor</b> (contributing factor) | <p>Indicate contributing factors that might have caused the incident to occur. This information is used for reporting to the Canadian WCB.</p> <p>If you are a user in British Columbia and you report to the BC WCB electronically, the contributing factor is required on a final report for all incident outcomes except reported only.</p> <p>Select a contributing factor from the list of prompt values that come from the Contributing Factors CAN table. The system makes the <b>Other Description</b> field unavailable for input.</p> |
| <b>Other Description</b>                    | <p>This field is generally unavailable for data entry. When the contributing factor code is <i>00996 - Other</i>, the Other Description field is available for data entry, and you must enter a narrative description of the <i>Other</i> contributing factor.</p>                                                                                                                                                                                                                                                                              |

## (IND) India

| <b>Field or Control</b>        | <b>Description</b>                                                                |
|--------------------------------|-----------------------------------------------------------------------------------|
| <b>Alcohol/Substance Taken</b> | <p>Select if alcohol or a substance is taken during the time of the incident.</p> |

## Incident Details - Location Page

Use the Incident Details - Location page (HS\_INC\_LOCATION) to identify the location where the incident occurred.

Navigation:

**Workforce Monitoring > Health and Safety > Obtain Incident Information > Incident Details > Location**

This example illustrates the fields and controls on the Incident Details - Location page (1 of 3). You can find definitions for the fields and controls later on this page.

|          |              |             |                 |        |        |           |
|----------|--------------|-------------|-----------------|--------|--------|-----------|
| Incident | Notification | Description | <b>Location</b> | Travel | People | Reporting |
|----------|--------------|-------------|-----------------|--------|--------|-----------|

Incident Number 19120001      Date 01/01/2009      Incident Type Exposure

**Incident Location Data**

☒ Occurred on Employer Premises

Location Set ID        Table Set shared across Corp

Location       

Establishment ID        [View Address](#)

Exact Location

176 characters remaining

This example illustrates the fields and controls on the Incident Details - Location page (2 of 3). You can find definitions for the fields and controls later on this page.

Canada

Street Number       Street Name

Unit Number       P.O.Box

Rural Route      

Location Size

Location Type

**Description of Accident Scene**

188 characters remaining

This example illustrates the fields and controls on the Incident Details - Location page (3 of 3). You can find definitions for the fields and controls later on this page.

France

Location Class

United Kingdom

Local Authority       ☐ Public Place

India

Establishment ID

Empl State Ins/Workmen Comp

Spain

☐ Car Incident

| <b>Field or Control</b>              | <b>Description</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|--------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Occurred on Employer Premises</b> | Select if the incident occurred on employer premises.                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>Location Set ID</b>               | If you select the <b>Occurred on Employer Premises</b> check box, select a location setID from the list of prompt values that come from the Company table. Use this field to set up the Location list of prompt values. For instance, if the location where the employee normally works is in Canada, but the location where the incident occurred is in France, use the <b>Location SetID</b> field to specify a French setID, and you can select the French location where the incident occurred. |
| <b>Location</b>                      | Select from the list of prompt values that come from the Location table for the location setID that you select.                                                                                                                                                                                                                                                                                                                                                                                     |
| <b>View Address or Edit Address</b>  | Click this link to view or edit the address where the incident occurred. <ul style="list-style-type: none"> <li>• If the incident occurred on the employer's premises you can only view the address. The address information is populated from the Location table.</li> <li>• If the incident occurred off the employer's premises, this link accesses the Address Data page where you can enter the address data for the off-site location where the incident occurred.</li> </ul>                 |
| <b>Exact Location</b>                | Record a detailed description of where the incident occurred, using up to 240 characters.                                                                                                                                                                                                                                                                                                                                                                                                           |

## (CAN) Canada

| <b>Field or Control</b>                                                   | <b>Description</b>                                                                                                                                                                                                                                                                    |
|---------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Street Number, Street Name, Unit Number, P.O. Box, and Rural Route</b> | If the system does not have street number and street name information for this employee, enter additional address details directly into these fields. Some of this information is needed if the incident location is at a nonstandard address, such as in a remote or rural location. |
| <b>Get Default Address</b>                                                | If street number and street name information already exists in the system for this employee, click the <b>Get Default Address</b> button to populate the fields that are on this page.                                                                                                |
| <b>Location Size</b>                                                      | Indicate the location size (in terms of numbers of people) by selecting from the list of translate values.                                                                                                                                                                            |

| <b>Field or Control</b>                                                                           | <b>Description</b>                                  |
|---------------------------------------------------------------------------------------------------|-----------------------------------------------------|
| <b>Accident At Temporary Site and Incident At Operating Locn</b> (incident at operating location) | Select the location at which the incident occurred. |

**Note:** For users in British Columbia who report incidents electronically to the BC WCB, much of this page is required for all incident types. Separate the street number from the street name. The additional unit number, PO box, and rural route information are only required if the location is a nonstandard address. The **Location Size** field is required. You must select either the **Accident at Temporary Site** or the **Incident at Operating Locn** check box if the **Occurred on Employer Premises** check box is selected on the Incident Location page. The WCB mainframe computer checks for valid address and postal code combinations, to ensure that these are correct to avoid having the electronic report rejected by the BC WCB.

### (FRA) France

| <b>Field or Control</b> | <b>Description</b>                                                                                                                                                           |
|-------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Location Class</b>   | Select the appropriate item from the list of available options to indicate additional information regarding the location and circumstances under which an incident occurred. |

### (GBR) United Kingdom

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

| <b>Field or Control</b> | <b>Description</b>                                                                                                                                                                                                                                                                                                                                                                                        |
|-------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Local Authority</b>  | Identify the local authority if the incident did not occur at a specific postal code location. For example, if an accident occurs while an employee is traveling in a vehicle, you might enter the location of the accident as <i>5 miles outside Reading on the A33 route</i> . Depending upon the circumstances of an accident, you might want to contact the HSE office in the area for clarification. |
| <b>Public Place</b>     | Select if the incident location is a public place.                                                                                                                                                                                                                                                                                                                                                        |



**(IND) India**

| <b>Field or Control</b>                                                            | <b>Description</b>                                                              |
|------------------------------------------------------------------------------------|---------------------------------------------------------------------------------|
| <b>Establishment ID</b>                                                            | Enter the ID of the establishment where the incident occurred.                  |
| <b>Empl State Ins/Workmen Comp</b> (employee state insurance/workmen compensation) | The type of registration under which the establishment is covered appears here. |

**(ESP) Spain**

| <b>Field or Control</b> | <b>Description</b>                                                                                                                                                                                                                                                                                                                                                                        |
|-------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Car Incident</b>     | Select this check box to indicate that this incident was a car accident. If this is the case, deselect the <b>Occurred on Employer Premises</b> check box. Then click the <b>Edit Address</b> link to enter as much detail as possible about the exact location of the accident. Use the <b>Exact Location</b> field to provide a more specific description of the car accident location. |

See “Managing Delta Communications” (PeopleSoft Human Resources Administer Workforce).

**Incident Details - Travel Page**

Use the Incident Details - Travel page (HS\_INC\_TRAVEL) to record travel-related incident details.

Navigation:

- **Workforce Monitoring > Health and Safety > Obtain Incident Information > Incident Details > Travel**
- **Workforce Monitoring > Health and Safety > Obtain Incident Information > Incident Details BRA > Travel**

This example illustrates the fields and controls on the Incident Details - Travel page (1 of 2). You can find definitions for the fields and controls later on this page.

Incident

Notification

Description

Location

Travel

People

Reporting

Incident Number 19120001    Date 01/01/2009    Incident Type Exposure

Travel Details

Start Date

Start Time

PST

Arrival Date

Arrival Time

PST

Destination

Mode Of Transport

☐ Break Taken In Journey

☐ Animals Involved

Comment

Route Details

Break Details

Animal Details

This example illustrates the fields and controls on the Incident Details - Travel page (2 of 2). You can find definitions for the fields and controls later on this page.

Germany

Drug/Alcohol Details

Alcohol/Substance Taken

Endorser

Accident Report

Accident Report Type

Reference Number

Country

USA

United States

Address

Edit Address

1 of 1

View All

| Field or Control                                      | Description                                                                                                                                                                                    |
|-------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Start Date, Start Time, Arrival Date and Arrival Time | Enter these values, if known.                                                                                                                                                                  |
| Destination                                           | When you enter a destination, the system makes the <b>Route Details</b> link available for entry when you move your cursor out of the field. Click this link to access the Route Details page. |
| Mode Of Transport                                     | Select the mode of travel from the list of available options. The values come from the Transport Table page.                                                                                   |
| Break Taken In Journey                                | Select if the travel is not continuous. The system makes the <b>Break Details</b> link available when you move your cursor out of the field. Click the link to access the Break Details page.  |

| <b>Field or Control</b> | <b>Description</b>                                                                                                                                           |
|-------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Animals Involved</b> | Select if an animal is involved in the incident.                                                                                                             |
| <b>Animal Details</b>   | When you select the Animals Involved check box, the system makes the <b>Animal Details</b> link available. Click the link to access the Animal Details page. |

### (DEU) Germany

| <b>Field or Control</b>        | <b>Description</b>                                                                                                        |
|--------------------------------|---------------------------------------------------------------------------------------------------------------------------|
| <b>Alcohol/Substance Taken</b> | If applicable, specify how drugs or alcohol are involved in the incident.                                                 |
| <b>Endorser</b>                | Record the identity of the person or authority who confirmed the information in the <b>Alcohol/Substance Taken</b> field. |
| <b>Accident Report Type</b>    | Select from the list of German authorities to indicate the accident report type, if needed.                               |
| <b>Reference Number</b>        | Enter the reference number that this public office is using to store the report.                                          |

## Route Details Page

Use the Route Details page (HS\_INC\_ROUTE\_SEC) to provide additional travel route details for health and safety incidents.

Navigation:

Click the **Route Details** link on the Incident Details - Travel page.

This example illustrates the fields and controls on the Route Details page. You can find definitions for the fields and controls later on this page.

✕
Help

**Route Details**

**Actual Route**

150 characters remaining

☐ **Direct Route Taken**

**Direct Route**

150 characters remaining

☐ **Usual Route Taken**

**Usual Route**

150 characters remaining

**Reason For Unusual Route**

100 characters remaining

**Route Details**

150 characters remaining

**Route Length (km)**

OK

Cancel

| <i><b>Field or Control</b></i> | <i><b>Description</b></i>                                                                                                                     |
|--------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Actual Route</b>            | Enter a description of the actual route that is traveled.                                                                                     |
| <b>Direct Route Taken</b>      | Select if the actual route is the most direct route that is available.                                                                        |
| <b>Direct Route</b>            | This field is available for entry if you do not select the <b>Direct Route Taken</b> check box. Enter a description of the most direct route. |
| <b>Usual Route Taken</b>       | Select if the actual route is the usual route.                                                                                                |
| <b>Usual Route</b>             | This field is available if you do not select the <b>Usual Route Taken</b> check box. Enter a description of the usual route.                  |
| <b>Route Length (km)</b>       | Enter the kilometers for the actual travel route.                                                                                             |

## Incident Details - People Page

Use the Incident Details - People page (HS\_INC\_PEOPLE) to identify witnesses, investigators, and other people who are connected to the incident.

These are people who are not injured or ill in the incident.

Navigation:

- **Workforce Monitoring > Health and Safety > Obtain Incident Information > Incident Details > People**
- **Workforce Monitoring > Health and Safety > Obtain Incident Information > Incident Details BRA > People**

This example illustrates the fields and controls on the Incident Details - People page (1 of 2). You can find definitions for the fields and controls later on this page.

Incident | Notification | Description | Location | Travel | **People** | Reporting

Incident Number 19120001 Date 01/01/2009 Incident Type Exposure

**People Connected to this Incident** [Search] [1 of 1] [View All]

Empl ID KC0014 David Henderson [Add] [Remove]

Role Eyewitness

Witnesses Confirmation

☐ Responsible For Incident

☐ Trustworthy Person

☒ Able To Answer Questions

☐ Under The Influence Of Drugs

Drug Class

[Edit Address](#)

Comment

This example illustrates the fields and controls on the Incident Details - People page (2 of 2). You can find definitions for the fields and controls later on this page.

Canada

Investigator Type

Germany

Insurance Details [Text Area] [50 characters remaining]

France

Accident Insurance

## People Connected to this Incident

| <b>Field or Control</b>                                                                                         | <b>Description</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|-----------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Empl ID (employee ID) or Non-Employee ID</b>                                                                 | <p>Enter either an employee ID or a non-employee ID. The field that you do not use disappears.</p> <hr/> <p><b>Note:</b> Enter employees into the system by using the Administer Workforce business process. Enter non-employees into the system by using the Non-Employee Details component (HS_NE_PERS_DATA) component.</p> <hr/> <p>See “(Classic) Adding a Person” (PeopleSoft Human Resources Administer Workforce).</p> <p>Add a row for each individual who is connected to the incident.</p> |
| <b>Role</b>                                                                                                     | Indicate the individual's role in the incident by using the list of translate values. The value that you select for this field affects the availability of fields on the remainder of the page.                                                                                                                                                                                                                                                                                                      |
| <b>Witnesses Confirmation</b>                                                                                   | <p>This field is available when you select the <b>Witness</b> check box. Use the list of translate values to identify whether or not the witness confirms the statement made by the individual who is involved in the incident.</p>                                                                                                                                                                                                                                                                  |
| <b>Responsible For Incident, Trustworthy Person, Able To Answer Questions, and Under The Influence Of Drugs</b> | <p>Select the appropriate check boxes. If the individual is in the role of <b>Investigator</b> or <b>Witness</b>, then the <b>Responsible For Incident</b> check box is unavailable for data entry.</p> <p>A witness is not involved in the incident but is merely an observer. An eyewitness is involved in the incident.</p>                                                                                                                                                                       |
| <b>Drug Class</b>                                                                                               | If you select the <b>Under the Influence of Drugs</b> check box, select the appropriate drug class from the list of available options.                                                                                                                                                                                                                                                                                                                                                               |
| <b>Edit Address</b>                                                                                             | Click this link to access the Incident Details - Contact Address page.                                                                                                                                                                                                                                                                                                                                                                                                                               |

### (CAN) Canada

Users in British Columbia who report incidents to the BC WCB electronically must identify an **investigator** (indicated in the **Role** field) when the report is a final report. This is true for all incident outcomes other than reported only. For incident outcomes of the type *Reported Only*, no investigator information is required.

To provide address information for all persons who are connected to the incident, click the **Edit Address** link and access the Contact Address page.

| <i><b>Field or Control</b></i> | <i><b>Description</b></i>                                                                                                               |
|--------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------|
| <b>Investigator Type</b>       | Select the type of investigator assigned to the incident. This field is available when the individual is identified as an investigator. |

### **(DEU) Germany**

| <i><b>Field or Control</b></i> | <i><b>Description</b></i>                                                               |
|--------------------------------|-----------------------------------------------------------------------------------------|
| <b>Insurance Details</b>       | Enter additional insurance information for people who are involved in German incidents. |

### **(FRA) France**

| <i><b>Field or Control</b></i> | <i><b>Description</b></i>                                                               |
|--------------------------------|-----------------------------------------------------------------------------------------|
| <b>Accident Insurance</b>      | Enter additional insurance information for people who are involved in French incidents. |

## **Incident Details - Reporting Page**

Use the Incident Details - Reporting page (HS\_INC\_REPORT) to maintain documentation showing that you notified the proper authorities of the incident.

Navigation:

- **Workforce Monitoring > Health and Safety > Obtain Incident Information > Incident Details > Reporting**
- **Workforce Monitoring > Health and Safety > Obtain Incident Information > Incident Details BRA > Reporting**

This example illustrates the fields and controls on the Incident Details - Reporting page (1 of 2). You can find definitions for the fields and controls later on this page.

Incident

Notification

Description

Location

Travel

People

Reporting

Incident Number 19120001    Date 01/01/2009    Incident Type Exposure

Reporting

1 of 1

View All

\*Regulatory Region

CANBC

Canada - British Columbia

+ -

Report Date

01/09/2009

Report Time

9:00AM

PST

\*Reported to

Carol Johnson

Jessica Brown

Person Reporting

KC0017

Location Set ID

SHARE

Reporting Location

KCBC00

Comment

This example illustrates the fields and controls on the Incident Details - Reporting page (2 of 2). You can find definitions for the fields and controls later on this page.

Canada

Report Status

☒ Preliminary

☐ Final

Reporting

Firm Number

22345

Oper. Location Reporting

222

India

Reporting Information

Reported By

Police Report

Reporting

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



| <b>Field or Control</b>   | <b>Description</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|---------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Regulatory Region</b>  | <p>Select the region where the initial incident occurred.</p> <p>When you add or update an incident and need to change the regulatory region from the default value, select from the list of prompt values. Regulatory regions are set up in the Regulatory Region table, and the Regions In Transaction table. The system uses the <i>HANDS</i> regulatory transaction type for health and safety transactions. This transaction type includes regulatory regions for the main countries that are supported in the system and for the Canadian provinces.</p> <hr/> <p><b>Warning!</b> If you change the regulatory region for an existing incident, and the setID for the previous and current regulatory regions differ, the system deletes all of the relevant linked values from the setup tables. Before proceeding with the change, the system prompts you to confirm the action. When the original information is deleted, you must reenter the data for the incident.</p> <hr/> |
| <b>Person Reporting</b>   | Select the person who is reporting (employee ID). The values come from the Workforce Administration business process.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Location SetID</b>     | Select the location setID for the location of the person who is reporting. Prompt values come from the TableSetID table.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>Reporting Location</b> | Select the reporting location that is officially making the report.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |

## (CAN) Canada

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

| <b>Field or Control</b> | <b>Description</b>                                                       |
|-------------------------|--------------------------------------------------------------------------|
| <b>Report Status</b>    | Select an option to indicate whether the report is preliminary or final. |
| <b>Reporting</b>        | Enter the Canadian WCB firm number and location code.                    |

| <b>Field or Control</b>         | <b>Description</b>                                                    |
|---------------------------------|-----------------------------------------------------------------------|
| <b>Review Submission Status</b> | Click to access the Incident Submission Status page for the incident. |

---

**Note:** (CAN) For users in British Columbia who report incidents to the BC WCB electronically, the **Report Status**, **Firm Number**, and **Location** fields are required. When the report status is final, you must identify an investigator on the Incident - People page.

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### (IND) India

| <b>Field or Control</b> | <b>Description</b>                                                                                                                                          |
|-------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Reported By</b>      | Select if the incident is reported by <i>Airlines</i> , <i>Police Report</i> , <i>Railways</i> , <i>State Transport Administration</i> , or <i>Others</i> . |

### Related Links

“Understanding Regulatory Regions” (Application Fundamentals)

## Incident Details BRA - CAT Information Page

Use the Incident Details BRA - CAT Information page (HS\_INCIDENT\_BRA) to identify the location where the incident occurred.

This information is used in the Work Risk (CAT) report and eSocial reporting for Brazil.

Navigation:

**Workforce Monitoring > Health and Safety > Obtain Incident Information > Incident Details BRA > CAT Information**

This example illustrates the fields and controls on the CAT Information page (1 of 2). You can find definitions for the fields and controls later on this page.

IncidentNotificationDescriptionTravelPeopleReportingCAT Information

Incident Number00000009Date10/28/1999Incident TypeVehicle/Equipment Accident

CAT Details

CAT Incident TypeIllness

☐ Police Register

Location TypeEmployer Establishment

Location Set IDKRSI1Brazilian SetID 1

Location CodeKRCSPSão Paulo - Unid.01

Establishment IDKRI1-2Filial Rio de Janeiro

Workplace Code

CAT Details

This example illustrates the fields and controls on the CAT Information page (2 of 2). You can find definitions for the fields and controls later on this page.

Address

CountryBRABrazil

AddressRua Lima Duarte 103  
Leblon  
Rio de Janeiro Rio de Janeiro 32000-030

Edit Address

CAT Specific Location

| Field or Control  | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|-------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| CAT Incident Type | <p>Select the work incident type. Valid values are <i>Illness</i>, <i>Route</i>, and <i>Typical</i>.</p> <p>This field is required if the selected incident type in the header area is <i>Accident</i>.</p> <p>If the selected CAT incident type is <i>Typical</i>, and the Worked Hours field is blank for the associated injury details on the <a href="#">Injury Details - Details BRA Page</a>, the system generates a mapping error in eSocial.</p> <p>See Also “eSocial Events Monitor Page” (PeopleSoft Global Payroll for Brazil).</p> |

| <b>Field or Control</b>         | <b>Description</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|---------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Police Register</b>          | Select to indicate that a police report has been filed.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Location Type</b>            | <p>Indicate where the incident occurred. Valid values include <i>Employee Service Taker</i>, <i>Employer Establishment</i>, <i>Establishment Outside Brazil</i>, <i>Other</i>, <i>Public Thoroughfare</i>, and <i>Rural Area</i>.</p> <p>This field is required if the selected incident type in the header area is <i>Accident</i>.</p>                                                                                                                                                                                                  |
| <b>Service Taker</b>            | <p>Select the service taker where the incident took place.</p> <p>This field appears if the selected location type is <i>Employee Service Taker</i>.</p>                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>CEI/CNPJ and Description</b> | <p>Displays the inscription number and description of the selected service taker. These fields appear if Global Payroll for Brazil is installed, and the selected location type is <i>Employee Service Taker</i>.</p> <p>These fields are available for manual input if Global Payroll for Brazil is not installed.</p>                                                                                                                                                                                                                   |
| <b>Location Set ID</b>          | <p>Select a location setID from the list of prompt values. Use this field to set up the location list of prompt values. For instance, if the location where the employee normally works is in one location, but the location where the incident occurred is in another, use the <b>Location SetID</b> field to specify the other setID, and you can select the location where the incident occurred.</p> <p>This field appears if the selected location type is <i>Employer Establishment</i> or <i>Establishment Outside Brazil</i>.</p> |
| <b>Location Code</b>            | <p>Select from the list of prompt values that come from the Location table for the location setID that you select.</p> <p>This field appears if the selected location type is <i>Employer Establishment</i> or <i>Establishment Outside Brazil</i>.</p>                                                                                                                                                                                                                                                                                   |
| <b>Establishment ID</b>         | <p>Enter the establishment where the incident took place.</p> <p>If a service taker is selected, the system refines the list of available establishments to the ones that are associated with the service taker.</p>                                                                                                                                                                                                                                                                                                                      |
| <b>Workplace Code</b>           | <p>Enter the workplace where the incident took place. Select an establishment before specifying a workplace.</p> <p>Workplaces are defined on the <a href="#">Workplace Table BRA Page</a>.</p>                                                                                                                                                                                                                                                                                                                                           |

| <b>Field or Control</b>                  | <b>Description</b>                                                                                                                                                                                            |
|------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>CAT Details</b>                       | Enter a detailed description of the work incident. The system populates this information in the <obsCAT> tag of XML files generated for the S-2210 event.                                                     |
| <b>Country, Address and Edit Address</b> | Enter the country code where the incident occurred. Then click the <b>Edit Address</b> button to view or edit the address where the incident occurred. The entered address is displayed on the Address field. |
| <b>CAT Specific Location</b>             | Record a detailed description of where the incident occurred.                                                                                                                                                 |

## Related Links

“S-2210 - Accident at Work Communication (CAT)” (PeopleSoft Global Payroll for Brazil)

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## Entering Injury Details

Use the Injury Details (HS\_INJURY\_ILL) and Injury Details BRA (HS\_INJURY\_ILL\_BRA) components to record information about injuries that are sustained in incidents.

This section lists prerequisites and common elements and discusses how to enter injury details.

---

**Note:** (CAN) For incidents in which the incident outcome is a dangerous occurrence, no injury information is entered into the system because by definition there are no injuries in these types of incidents. Proceed to the Consequent Actions pages to enter corrective and preventative actions for the incident.

---

## Prerequisites

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

## Common Elements Used in this Section

| <b>Field or Control</b> | <b>Description</b>                                                                                                                                                                      |
|-------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Accident Type</b>    | If the injury resulted from an accident, select the type of accident from the Accident Type table.                                                                                      |
| <b>Body Part</b>        | Select a code from the list of values from the Body Parts table.                                                                                                                        |
| <b>Nature of Injury</b> | Select a code to identify the injury in terms of its principal physical characteristics (for example, what happened to the employee). The values come from the Nature of Injury tables. |

| <b>Field or Control</b>     | <b>Description</b>                                                                                                                                                                          |
|-----------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>PAT (ESP)</b>            | Partes de Accidentes de Trabajo.                                                                                                                                                            |
| <b>Primary Injury</b>       | Select if this injury detail is associated with the primary injury.                                                                                                                         |
| <b>RATSB (ESP)</b>          | Relación de Accidentes de Trabajo Sin Baja médica.                                                                                                                                          |
| <b>Side of Body</b>         | Indicate the side of the body for the body part, if appropriate, by selecting from the list of translate values.                                                                            |
| <b>Source of Injury</b>     | Select a code to identify the object, substance, exposure, or bodily motion that produced or inflicted the injury. Use the list of prompt values that come from the Source of Injury table. |
| <b>Unsafe Act Performed</b> | If applicable, select a code to indicate if the accident was caused by an unsafe action.                                                                                                    |

## Pages Used to Enter Injury Details

| <b>Page Name</b>                                              | <b>Definition Name</b> | <b>Usage</b>                                                                                                                                                                                                                                                           |
|---------------------------------------------------------------|------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <u>Injury Details - Injury Page</u>                           | HS_INJ_NOTIFY          | Enter information about employees and non-employees who have work-related injuries or illnesses.<br><br>(BRA) To report a Brazilian injury using the Injury Details BRA component, the originating incident must be reported using the Incident Details BRA component. |
| <u>(ESP) Detailed PAT Data Page (Injury Details - Injury)</u> | HS_PAT1_ESP_SEC        | (ESP) Enter detailed information about the accident that caused the injury for PAT reporting.<br><br>The link appears only when <i>PAT</i> is the value in the <b>Incident Type</b> field in the Spain section of the Injury Details - Injury page.                    |
| <u>(ESP) Detailed RAF Data Page (Injury Details - Injury)</u> | HS_RAF1_ESP_SEC        | (ESP) Enter the reason for discharge, the injury grade, and the diagnosis code for the RAF incident.                                                                                                                                                                   |
| <u>Injury Details - Description Page</u>                      | HS_INJ_DESCRIPTION     | Enter detailed information about the injury or illness or both that are involved in the incident.                                                                                                                                                                      |

| <b>Page Name</b>                                                  | <b>Definition Name</b> | <b>Usage</b>                                                                                                                                                                                                                                                            |
|-------------------------------------------------------------------|------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <u>Injury Details - Statements Page</u>                           | HS_INJ_STATEMENT       | Document the statements that are made by the injured or ill party, the employer, and witnesses.                                                                                                                                                                         |
| <u>Injury Details - Details Page</u>                              | HS_INJ_DETAIL          | Provide details of the injury or illness that is suffered by each person who is involved in the incident.                                                                                                                                                               |
| Injury - Body Parts                                               | HS_INJ_BP_SEC          | Identify body parts that are affected by the injury or illness.                                                                                                                                                                                                         |
| Injury - Nature of Injury                                         | HS_INJ_NOI_SEC         | Define the nature of the injury or illness.                                                                                                                                                                                                                             |
| Injury - Source of Injury                                         | HS_INJ_SOI_SEC         | Identify the source of the injury.                                                                                                                                                                                                                                      |
| Injury - Accident Type                                            | HS_INJ_ACC_SEC         | Assign accident types to the injury or illness.                                                                                                                                                                                                                         |
| Injury - Unsafe Act                                               | HS_INJ_ACT_SEC         | Indicate if an unsafe act contributed to the injury or illness.                                                                                                                                                                                                         |
| <u>(ESP) Detailed PAT Data Page (Injury Details - Details)</u>    | HS_PAT2_ESP_SEC        | (ESP) Enter detailed information about the accident that caused the injury.                                                                                                                                                                                             |
| <u>(ESP) Detailed RATSBS Data Page (Injury Details - Details)</u> | HS_RATSBS_ESP_SEC      | <p>(ESP) Enter detailed data for RATSBS reporting.</p> <p>The link appears only when <i>RATSBS</i> is the <b>Incident Type</b> field value in the Spain section of the Injury Details - Injury page.</p>                                                                |
| <u>Injury Details - 1st Aid Page</u>                              | HS_INJ_AID             | Enter first aid and medical treatment information for all injured or ill individuals who are involved in the incident.                                                                                                                                                  |
| Ambulance Details                                                 | HS_INJ_AID_AMB_SEC     | <p>Enter additional details about the time when the individual was transported to a hospital by an ambulance.</p> <p>The <b>Ambulance Required</b> check box on the Injury Details - 1st Aid page must be selected for the <b>Ambulance Details</b> link to appear.</p> |

| <b>Page Name</b>                                                 | <b>Definition Name</b> | <b>Usage</b>                                                                                                                                                                                                                   |
|------------------------------------------------------------------|------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Prior Disability                                                 | HS_INJ_PDSCAN_SEC      | Enter details about any relevant prior disabilities of the injured or ill person.<br><br>The <b>Prior Disability</b> check box on the Injury Details - 1st Aid page must be selected for the <b>Disability</b> link to appear. |
| Prior Health Condition                                           | HS_INJ_PHCCAN_SEC      | Enter details about any relevant prior health conditions of the injured or ill person.                                                                                                                                         |
| <u>Injury Details - Diagnoses Page</u>                           | HS_INJ_DIAGNOSIS       | Record details about the physician, hospital or clinic, and the medical diagnoses that are involved with the injured and ill employees.                                                                                        |
| <u>(ESP) Detailed PAT Data Page (Injury Details - Diagnoses)</u> | HS_PAT3_ESP_SEC        | (ESP) Specify medical assistance and economic data for PAT incidents.                                                                                                                                                          |
| Medical Facility Address                                         | HS_INJ_MEDFAC_SEC      | View the address of the medical facility.                                                                                                                                                                                      |
| <u>Injury Details - Work-Related Page</u>                        | HS_INJ_WORK            | Record if the incident occurred while the person was involved in a work-related activity.                                                                                                                                      |
| Wage Inclusions                                                  | HS_INJ_WICAN_SEC       | (CAN) Enter additional information about wage inclusions for Canadian employees who have a work-related injury or illness.                                                                                                     |
| Wage Additions                                                   | HS_INJ_WACAN_SEC       | (CAN) Enter additional information about wage additions for Canadian employees who have a work-related injury or illness.                                                                                                      |
| Actions                                                          | HS_INJ_ACTCAN_SEC      | (CAN) Enter additional information that is needed for reporting to the WCB, concerning the employee's actions at the time of the incident.                                                                                     |
| WCB Form 7 Details                                               | HS_INJ_WCBCAN_SEC      | (CAN) Enter additional information about Canadian incidents that is needed for reporting to the WCB.                                                                                                                           |
| <u>Long Term Earnings Page</u>                                   | HS_INJ_LTECAN_SEC      | (CAN) Enter additional information about long term earnings for Canadian employees who have work-related injuries or illnesses.                                                                                                |



| <b>Page Name</b>                         | <b>Definition Name</b> | <b>Usage</b>                                                                                                           |
|------------------------------------------|------------------------|------------------------------------------------------------------------------------------------------------------------|
| <u>Return To Work Page</u>               | HS_INJ_RTWCAN_SEC      | (CAN) Enter additional return-to-work details for Canadian employees who are injured or ill in work-related incidents. |
| <u>Work Information Page</u>             | WCB_WORK_INFO_SEC      | (CAN) Enter additional work information for employees who are injured or ill in work-related incidents.                |
| <u>Injury Details - Reporting Page</u>   | HS_INJ_REPORT          | Track if incidents are reportable under the terms of an authority of a regulatory region.                              |
| <u>Injury Details - Details BRA Page</u> | HS_INJURY_BRA          | (BRA) Enter injury details for Brazil. This information is used on the Work Risk report for Brazil.                    |

## Injury Details - Injury Page

Use the Injury Details - Injury page (HS\_INJ\_NOTIFY) to enter information about employees and non-employees who have work-related injuries or illnesses.

Navigation:

- **Workforce Monitoring > Health and Safety > Obtain Incident Information > Injury Details > Injury**
- **Workforce Monitoring > Health and Safety > Obtain Incident Information > Injury Details BRA > Injury**

This example illustrates the fields and controls on the Injury Details - Injury page (1 of 3). You can find definitions for the fields and controls later on this page.

Injury

Description

Statements

Details

1st Aid

Diagnoses

Work-Related

Reporting

Incident Number 19120001
Date 01/01/2009
Incident Type Exposure

Person Involved

Empl ID

KC0017

Q

Jessica Brown

Empl Record

0

Q

+

-

Date of Birth

02/10/1962

Date of Death

Gender

Female

Employee Data at Incident Date

Business Unit

CAN01

CAN01 BU for Canada

Department

14000

Administration

Job Code

170010

Sr Administrative Assistant

Location

KCBC00

Vancouver Branch

Active

Notification - This Person

Date Reported

01/09/2009

Time Reported

9:00AM

PST

This example illustrates the fields and controls on the Injury Details - Injury page (2 of 3). You can find definitions for the fields and controls later on this page.

Canada

Injury

Date01/01/2009

Time

☐ Date and Time Exact

Exposure

Start Date01/01/2009

End Date01/01/2009

Start Time9:00AM

End Time10:00AM

Designates

Sequence1

DesignateKC0012

Nancy Quency

Date Reported01/01/2009

Time Reported

Position TypeFirst Aid Attendant

Other Description

1st Aid Cert Nbr

☐ First Designate Reported To

This example illustrates the fields and controls on the Injury Details - Injury page (3 of 3). You can find definitions for the fields and controls later on this page.

Germany

☐ Owner Partner

☐ Partner

☐ Incompetent

☐ Relation

Relation

Work Area

France

Timetable

FromTo

Morning

Afternoon

United Kingdom

☐ Member Of Public

☐ Self-Employed

Spain

Incident Type

Delta Reporting StatusNot Communicated

| Field or Control | Description                                                                                                                                                                                                                                                                                                                                                                                                          |
|------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Empl ID          | <div>For each person who is involved in the incident, select either an employee ID or a non-employee ID. The person's name, date of birth, gender and, if applicable, the date of death appear next to this field.</div> <div><b>Note:</b> If a fatality occurs, enter the date of death in the Workforce Administration business process or the Non-Employee Details - Personal Details page, as appropriate.</div> |

| <b>Field or Control</b>                | <b>Description</b>                                                                                                                                                               |
|----------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Empl Record</b> (employment record) | If you enter information for an employee who has more than one job, select the employment record number for the job that the employee was performing when the incident occurred. |
| <b>Employee Data at Incident Date</b>  | The information that appears here comes from job data that is valid as of the incident date.                                                                                     |
| <b>Notification - This Person</b>      | Enter the date and time when this person's injury or illness was reported to an organization official.                                                                           |

## (CAN) Canada

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

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

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

| <b>Field or Control</b>                                | <b>Description</b>                                                                                                                                                                                                                                                                 |
|--------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Sequence</b>                                        | This is a sequential number that the system assigns automatically to differentiate between designates. When you save this record, the sequence number is available in the First Aider Designate field on the 1st Aid page.                                                         |
| <b>Designate</b>                                       | Select the employee ID of the designate.                                                                                                                                                                                                                                           |
| <b>Date Reported</b> and <b>Time Reported</b>          | Enter the date and the time that the injury was reported.                                                                                                                                                                                                                          |
| <b>Position Type</b>                                   | The value that you select determines the availability of the remaining fields in the group box. For example, if you select nothing or the <i>Worker's Supervisor</i> type, the system makes the <b>Other Description</b> and <b>1st Aid Cert Nbr</b> fields unavailable for entry. |
| <b>Other Description</b>                               | If you select <i>Other</i> as the position type, enter a description of the designate's position.                                                                                                                                                                                  |
| <b>1st Aid Cert Nbr</b> (first aid certificate number) | If you select <i>First Aid Attendant</i> as the position type, enter the first aid certificate number for the designate.                                                                                                                                                           |

| <b><i>Field or Control</i></b>     | <b><i>Description</i></b>                                                         |
|------------------------------------|-----------------------------------------------------------------------------------|
| <b>First Designate Reported To</b> | Select whether the person is the first designate to whom the injury was reported. |

**(DEU) Germany**

| <b><i>Field or Control</i></b>                           | <b><i>Description</i></b>                                                                                                                                                 |
|----------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Owner Partner, Partner, Incompetent, and Relation</b> | Indicate the relationship of the person who was notified to the person who was involved. If you select <i>Relation</i> , the associated field is available for selection. |
| <b>Work Area</b>                                         | Select an option from the values that you set up in the Work Area table.                                                                                                  |

**(FRA) France**

| <b><i>Field or Control</i></b> | <b><i>Description</i></b>           |
|--------------------------------|-------------------------------------|
| <b>Timetable</b>               | Enter the time of the notification. |

**(GBR) United Kingdom**

| <b><i>Field or Control</i></b>            | <b><i>Description</i></b>                                                                                                                   |
|-------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Member Of Public and Self-Employed</b> | If the individual who is involved in the incident is a non-employee, indicate if that person is a member of the public or is self-employed. |

**(ESP) Spain**

| <b>Field or Control</b> | <b>Description</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|-------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Incident Type</b>    | <p>Select the incident type of the industrial accident:</p> <ul style="list-style-type: none"> <li><i>PAT</i>: Select to indicate that this is an industrial accident where the person provides the company with a sick note. Additional fields appear in this section when this option is selected.</li> <li><i>RATSB</i>: Select to indicate that this is an industrial accident where the person does not provide the company with a sick note. All other fields in this section are hidden when this option is selected.</li> </ul> |

**Note:** The fields described here appear when you select *PAT* as the **Incident Type** value in the Spain section of the Injury page.

| <b>Field or Control</b>           | <b>Description</b>                                                                                                                                                                                                                                                                                        |
|-----------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Relapse</b>                    | Select this check box if the industrial accident is a relapse occurrence caused by a previous temporary disability.                                                                                                                                                                                       |
| <b>Absence Begin Date</b>         | Enter the date that the employee begins to be absent from work due to the industrial accident. If this is a relapse occurrence, enter the begin date of the original occurrence.                                                                                                                          |
| <b>End Date</b>                   | Enter the date that the employee's absence from work ends due to a medical discharge or death of the employee. When you enter the medical discharge or death date, the PAT incident becomes a RAF (Relación de Altas o Fallecimientos de accidentados or Relation of High or Deaths of injured) incident. |
| <b>Accident with sick note</b>    | Click this link to access the Detailed PAT Data page, where you must enter details about the employee, employer, and place of accident for the PAT incident.                                                                                                                                              |
| <b>Medical Discharge or Death</b> | Click this link to access the Detailed RAF Data page, where you must enter the reason for discharge, the injury grade, and the diagnosis code for the RAF incident. The system displays this link when you have entered an absence end date to make it a RAF incident type.                               |

See “Managing Delta Communications” (PeopleSoft Human Resources Administer Workforce).

## (ESP) Detailed PAT Data Page (Injury Details - Injury)

Use the Detailed PAT Data (Injury Details - Injury) page (HS\_PAT1\_ESP\_SEC) to enter detailed information about the accident that caused the injury for PAT reporting.

Navigation:

Click the **Accident with sick note** link in the Spain section of the Injury Details - Injury page.

This example illustrates the fields and controls on the Injury Details, Injury - Detailed PAT Data page. You can find definitions for the fields and controls later on this page.

Detailed PAT Data

×

Help

Empl ID

KC0017

Jessica Brown

Absence Begin Date

Employer

Company Acting As

☐ Hiring
 ☐ ETT

Place

Incident Address

1230 Calley St.

↑

↓

\*Place Code

Usual Work Center

▼

SSN Employer

Schedule Data

\*Working Hour

☐

OK

Cancel

### Employer

Use this group box to enter employer information about where the industrial accident occurred.

| Field or Control | Description                                                                                                                                                     |
|------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Hiring</b>    | Select this check box to indicate that the company at the time of the industrial accident is the hiring company that contracts or subcontracts to the employee. |

| <b>Field or Control</b> | <b>Description</b>                                                                                |
|-------------------------|---------------------------------------------------------------------------------------------------|
| <b>ETT</b>              | Select this check box to indicate that the company is a place of temporary work for the employee. |

## Place

Use this group box to report where the industrial accident took place. Indicate whether the industrial accident occurred in the employee's company or in another company.

| <b>Field or Control</b>                               | <b>Description</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|-------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Place Code</b>                                     | <p>Select the location where industrial accident took place. Valid values are:</p> <ul style="list-style-type: none"> <li>• <i>In Itinere</i>: The industrial accident occurred when the employee was going to or returning from the work. By selecting this option, the page displays the <b>Road / KM</b>, <b>Other Data</b>, and <b>Commuting</b> fields.</li> <li>• <i>Other Work Center</i>: The industrial accident occurred in another work center. By selecting this option, the page displays the <b>External Company</b> and <b>SSN Employer</b> fields.</li> <li>• <i>Taken Journey</i>: The industrial accident took place during a work hour when the employee was traveling. By selecting this option, the page displays the <b>Road / KM</b> and <b>Other Data</b> fields.</li> <li>• <i>Usual Work Center</i>: The industrial accident occurred in the employee's usual work center.</li> </ul> <p>The system uses the value of this field to populate the &lt;codigo&gt; tag in the XML file.</p> |
| <b>SSN Employer</b> (social security number employer) | <p>If the industrial accident occurred out of the employee's usual work center, enter the social security number of the company where the industrial accident occurred.</p> <p>This field is available when you select <i>Other Work Center</i> from the <b>Place Code</b> field.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>Road / Km, and Other Data</b>                      | <p>Enter the distance or road traveled, as well as other pertinent data about the place where the injury occurred.</p> <p>These fields are available when you select <i>In Itinere</i> or <i>Taken Journey</i> from the <b>Place Code</b> field.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |

| <b>Field or Control</b> | <b>Description</b>                                                                                                                                                                                   |
|-------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Commuting</b>        | <p>Enter whether the injury occurred while traveling <i>To Work</i> or <i>Back from Work</i>.</p> <p>This field is available when you select <i>In Itinere</i> from the <b>Place Code</b> field.</p> |

## Schedule Data

| <b>Field or Control</b> | <b>Description</b>                                                                                                                                                                                                                                                                                                     |
|-------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Working Hour</b>     | <p>If a temporary disability is an industrial accident because the accident occurred at work, select the working hour that the accident occurred. The system displays this field only for <i>PAT</i> incident types, although it does not appear when you select <i>In Itinere</i> as the <i>Place Code</i> value.</p> |

## Related Links

“Managing Delta Communications” (PeopleSoft Human Resources Administer Workforce)

## (ESP) Detailed RAF Data Page (Injury Details - Injury)

Use the Detailed RAF Data (Injury Details - Injury) page (HS\_RAF1\_ESP\_SEC) to enter the reason for discharge, the injury grade, and the diagnosis code for the RAF incident.

Navigation:

Click the **Medical Discharge or Death** link in the Spain section of the Injury Details - Injury page.

This example illustrates the fields and controls on the Detailed RAF Data (Injury Details - Injury) page. You can find definitions for the fields and controls later on this page.

Detailed RAF Data

×

Help

RAF Data

\*Reason Discharge

Recovery

▼

\*RAF Injury Grade

Moderate

▼

\*Diagnosis Code

802

🔍

OK

Cancel



## RAF Data

Use this group box to enter the information required for RAF reporting.

| <b>Field or Control</b> | <b>Description</b>                                                                                                                                                                            |
|-------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Reason Discharge</b> | Select the reason for the discharge. The system populates the <causa> tag in the XML file with this value.                                                                                    |
| <b>RAF Injury Grade</b> | Select a RAF injury grade to indicate the severity of the injury according to social security administration codes. The system populates the <gradoreal> tag in the XML file with this value. |
| <b>Diagnosis Code</b>   | Select the diagnosis code according to social security administration codes. The system populates the <diagnostoco> tag in the XML file with this value.                                      |

## Related Links

“Managing Delta Communications” (PeopleSoft Human Resources Administer Workforce)

## Injury Details - Description Page

Use the Injury Details - Description page (HS\_INJ\_DESCRIPTION) to enter detailed information about the injury or illness or both that are involved in the incident.

Navigation:

- **Workforce Monitoring > Health and Safety > Obtain Incident Information > Injury Details > Description**
- **Workforce Monitoring > Health and Safety > Obtain Incident Information > Injury Details BRA > Description**

This example illustrates the fields and controls on the Injury Details - Description page (1 of 2). You can find definitions for the fields and controls later on this page.

InjuryDescriptionStatementsDetails1st AidDiagnosesWork-RelatedReporting

Incident Number19120001Date01/01/2009Incident TypeExposure

Person Involved

Empl IDKC0017Jessica BrownEmpl Record0

Date of Birth02/10/1962Date of DeathGenderFemale

Primary Outcome

☐ Injury☒ Illness☐ Death

Treatment Required

☐ Medical Treatment☒ First Aid☐ Hospitalized☐ Not Required

Occupational Illness

Illness

Injury/Illness Details

EMPLOYEE HAD DIFFICULTY BREATHING, EYES WATERING AND STINGING

This example illustrates the fields and controls on the Injury Details - Description page (2 of 2). You can find definitions for the fields and controls later on this page.

United Kingdom

Occ Illness Diagnosis Date

Canada

Injury OutcomeHealth Care Only

Business TypeBANK

Description of Accident Scene

200 characters remaining

People

Empl IDKC0014David Henderson

RoleWitness

☐ Responsible For Incident

Comment

| Field or Control   | Description                                                                                                      |
|--------------------|------------------------------------------------------------------------------------------------------------------|
| Primary Outcome    | Indicate whether the incident resulted in <i>Injury</i> , <i>Illness</i> , or <i>Death</i> .                     |
| Treatment Required | Indicate if the treatment was <i>Medical</i> , <i>First Aid</i> , <i>Hospitalized</i> , or <i>Not Required</i> . |

**Note:** (DEU) All illnesses that involve German operations are tracked by using the DEU Illness Tracking (HS\_ILLNESS\_GER) component.

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| <b>Field or Control</b>     | <b>Description</b>                                                                                                                                                                    |
|-----------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Occupational Illness</b> | If you select Illness in the Primary Outcome group box, then the <b>Illness</b> field is available for data entry in this group box. Values come from the Occupational Illness table. |

| <b>Field or Control</b>       | <b>Description</b>               |
|-------------------------------|----------------------------------|
| <b>Injury/Illness Details</b> | Enter details about the illness. |

### (GBR) United Kingdom

| <b>Field or Control</b>                                                 | <b>Description</b>                                                   |
|-------------------------------------------------------------------------|----------------------------------------------------------------------|
| <b>Occ Illness Diagnosis Date</b> (occupational illness diagnosis date) | This field is available when the selected injury outcome is illness. |

### (CAN) Canada

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

| <b>Field or Control</b> | <b>Description</b>                                                                                               |
|-------------------------|------------------------------------------------------------------------------------------------------------------|
| <b>Injury Outcome</b>   | Values are <i>Fatality</i> , <i>Health Care Only</i> , <i>Reported Only</i> , and <i>Short Term Disability</i> . |
| <b>Business Type</b>    | Use the values that are approved by the regional WCB office to describe the business type (required).            |

### (CAN) People

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

| <b>Field or Control</b>            | <b>Description</b>                                                                                                                                                                                                                                                                                                                       |
|------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Empl ID and Non-Employee ID</b> | <p>Enter either an employee ID or a non-employee ID.</p> <hr/> <p><b>Note:</b> You must enter the employee into the system by using the Workforce Administration business process, or the non-employee by using Non-Employee Details.</p> <hr/> <p>Prepare a separate data row for each individual who is connected to the incident.</p> |
| <b>Role</b>                        | Select a role for each individual who is identified. Values are <i>Witness</i> or <i>Other Party</i> . The value that you select here affects the availability of fields on the remainder of the page.                                                                                                                                   |
| <b>Responsible For Incident</b>    | If you select <i>Other Party</i> in the <b>Role</b> field, you can select this check box if applicable. Enter additional comment as needed.                                                                                                                                                                                              |

**Note:** For users in British Columbia who report incidents to the BC WCB electronically, the information that is on this page is not required for incident outcomes that are dangerous occurrences. The Injury Outcome and Business Type are required fields. Remember, the most severe injury outcome for all of the injured persons in this incident is used to derive the incident outcome on the Incident Details - Canada page.

## Injury Details - Statements Page

Use the Injury Details - Statements page (HS\_INJ\_STATEMENT) to document the statements that are made by the injured or ill party, the employer, and witnesses.

Navigation:

- **Workforce Monitoring > Health and Safety > Obtain Incident Information > Injury Details > Statements**
- **Workforce Monitoring > Health and Safety > Obtain Incident Information > Injury Details BRA > Statements**

This example illustrates the fields and controls on the Injury Details - Statements page. You can find definitions for the fields and controls later on this page.

InjuryDescriptionStatementsDetails1st AidDiagnosesWork-RelatedReporting

Incident Number19120001Date01/01/2009Incident TypeExposure

Person Involved

Empl IDKC0017Jessica BrownEmpl Record0  
Date of Birth02/10/1962Date of DeathGenderFemale

Employer Objections

☐ Employer Objects to Statement

Employer's Statement

EMPLOYEE SUFFERED DISCOMFORT/ILLNESS DUE TO EXPOSURE TO TOXIC GAS

Injured Party's Statement

☐ Witness Confirms Statement  
MY EYES WERE STINGING AND WATERING AFTER THE INCIDENT, AND I WAS HAVING TROUBLE BREATHING DUE TO THE EXPOSURE

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

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

Injury Details - Details Page

Use the Injury Details - Details page (HS\_INJ\_DETAIL) to provide details of the injury or illness that is suffered by each person who is involved in the incident.

Navigation:

- **Workforce Monitoring > Health and Safety > Obtain Incident Information > Injury Details > Details**
- **Workforce Monitoring > Health and Safety > Obtain Incident Information > Injury Details BRA > Details**

This example illustrates the fields and controls on the Injury Details - Details page (1 of 2). You can find definitions for the fields and controls later on this page.

Incident Number 19120001 Date 01/01/2009 Incident Type Exposure

**Person Involved**

Empl ID KC0017 Jessica Brown Empl Record 0  
Date of Birth 02/10/1962 Date of Death Gender Female

**Injury Description**

Body Parts Nature of Injury Source of Injury Accident Type Unsafe Act

**Primary Injury Details**

Body Part  
Nature of Injury  
Source of Injury  
Accident Type  
Unsafe Act Performed

This example illustrates the fields and controls on the Injury Details - Details page (2 of 2). You can find definitions for the fields and controls later on this page.

**Canada**

☐ Damaged Appliance Indicator ☐ Worker Supplies Own Equipment

**Link**

Nature of Injury Description Body Part Code Description

**Germany**

Unsafe Item

**France**

**Protective Clothing Details**

Protective Clothing

**United Kingdom**

Height of Fall meters

**Spain**

Accident with sick note

| <b>Field or Control</b>   | <b>Description</b>                                                                             |
|---------------------------|------------------------------------------------------------------------------------------------|
| <b>Injury Description</b> | Click the links to gain access to the detail pages that describe the attributes of the injury. |

**Note:** Information on the Body Parts, Nature of Injury, and Accident Type pages is required for an incident outcome of reported only. Information on the Body Parts, Nature of Injury, Source of Injury, and Accident Type pages is required for the incident outcomes health care only, short-term disability, and fatality.

## (CAN) Canada

For users in British Columbia who report incidents to the BC WCB electronically, the injury information that is on this page is not required for incident outcomes that are dangerous occurrences.

| <b>Field or Control</b>              | <b>Description</b>                                                                                                                                                                                                                       |
|--------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Damaged Appliance Indicator</b>   | Select to indicate that the injury involved damage to an artificial appliance, for example, eyeglasses, a hearing aid, or dentures.                                                                                                      |
| <b>Worker Supplies Own Equipment</b> | Select to indicate that the injured worker supplies his own equipment.                                                                                                                                                                   |
| <b>Nature of Injury</b>              | Enter the code that you want to link to a body part. The reason for creating this link is that the BC WCB assumes that the nature of injury is directly associated with some body part.                                                  |
| <b>Body Part Code</b>                | <p>Enter the code for the body part that you want to link to the nature of the injury.</p> <p>To activate the link, save the information that you enter on the Body Parts and Nature of Injury pages, and save the information here.</p> |

## (DEU) Germany

| <b>Field or Control</b> | <b>Description</b>                                                                     |
|-------------------------|----------------------------------------------------------------------------------------|
| <b>Unsafe Item</b>      | Select an unsafe item code, if applicable. Values come from the DEU Unsafe Item table. |

**(FRA) France**

| <i><b>Field or Control</b></i> | <i><b>Description</b></i>                                                                                        |
|--------------------------------|------------------------------------------------------------------------------------------------------------------|
| <b>Protective Clothing</b>     | Identify the employee's protective clothing at the time of the incident. Insert a new data row for more entries. |

**(GBR) United Kingdom**

| <i><b>Field or Control</b></i> | <i><b>Description</b></i>                                                         |
|--------------------------------|-----------------------------------------------------------------------------------|
| <b>Height of Fall</b>          | If the individual was involved in a fall, enter the height of the fall in meters. |

**(ESP) Spain**

| <i><b>Field or Control</b></i>    | <i><b>Description</b></i>                                                                                                                                                                                                     |
|-----------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Accident with sick note</b>    | If the accident is a <i>PAT</i> incident type, the system displays the <b>Accident with sick note</b> link. Click it to access the Detailed PAT Data page, where you can specify further details of the PAT incident.         |
| <b>Accident without sick note</b> | If the accident is a <i>RATSB</i> incident type, the system displays the <b>Accident without sick note</b> link. Click it to access the Details RATSB Data page, where you can specify further details of the RATSB incident. |

See “Managing Delta Communications” (PeopleSoft Human Resources Administer Workforce).

**(ESP) Detailed PAT Data Page (Injury Details - Details)**

Use the Detailed PAT Data (Injury Details - Details) page (HS\_PAT2\_ESP\_SEC) to enter detailed information about the accident that caused the injury.

Navigation:

Click the **Accident with sick note** link in the Spain section of the Injury Details - Details page.



This example illustrates the fields and controls on the Detailed PAT Data (Injury Details - Details) page (1 of 2). You can find definitions for the fields and controls later on this page.

Detailed PAT Data

Help

Risk Evaluation

☐ Risk Evaluation

Usual Work

☐ Usual Work

Where Accident Occurred

Gas pipeline erupted on property.

Where Accident Occurred

\*Place Type

Work When Accident Occurred

\*Work Type

This example illustrates the fields and controls on the Detailed PAT Data (Injury Details - Details) page (2 of 2). You can find definitions for the fields and controls later on this page.

**Act. When Accident Occurred**

\*Task

\*Usual Working Tool

**Irre. Act. When Acci. Occurred**

\*Cause

\*Deviation

\*Source of Injury

**How Accident Occurred**

\*Contact

\*Unusual Working Tool

**Employees Involved**

☐ Multiple Employees

☐ Witness

Witness Data

## Risk Evaluation

| <i>Field or Control</i> | <i>Description</i>                                                                                                                                                                                           |
|-------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Risk Evaluation</b>  | Select this check box to indicate that a risk evaluation has been made at the company where the industrial accident took place. The system uses this value to populate the <evaluacion> tag in the XML file. |

## Usual Work

| <i>Field or Control</i> | <i>Description</i>                                                                                                                                                                                |
|-------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Usual Work</b>       | Select this check box to indicate that the employee was working on usual work when the industrial accident took place. The system uses this value to populate the <habitual> tag in the XML file. |

## Where Accident Occurred

| <i>Field or Control</i> | <i>Description</i>                                                                                      |
|-------------------------|---------------------------------------------------------------------------------------------------------|
| <b>Place Type</b>       | Select the type of place where the accident took place. Define valid values on the XML Code Table page. |

## Work When Accident Occurred

| <i>Field or Control</i> | <i>Description</i>                                                                                                                |
|-------------------------|-----------------------------------------------------------------------------------------------------------------------------------|
| <b>Work Type</b>        | Select the type of work that the employee was doing when the accident took place. Define valid values on the XML Code Table page. |

## Act. When Accident Occurred (activity when accident occurred)

| <i>Field or Control</i>   | <i>Description</i>                                                                                                                                                |
|---------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Task</b>               | Select the task that the employee was doing when the accident took place. Define valid values on the XML Code Table page.                                         |
| <b>Usual Working Tool</b> | Select the category of tool associated with the task that the person was performing when the accident took place. Define valid values on the XML Code Table page. |

## Irre. Act. When Acci. Occurred (irregular activity when accident occurred)

| <i>Field or Control</i> | <i>Description</i>                                                                                      |
|-------------------------|---------------------------------------------------------------------------------------------------------|
| <b>Cause</b>            | Describe the unusual incident that started the accident.                                                |
| <b>Deviation</b>        | Select the unusual incident that started the accident. Define valid values on the XML Code Table page.  |
| <b>Source of Injury</b> | Select the category of the tool that caused the injury. Define valid values on the XML Code Table page. |

## How Accident Occurred

| <i>Field or Control</i>     | <i>Description</i>                                                                                                                          |
|-----------------------------|---------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Contact</b>              | Select the type of contact that took place for this industrial accident, such as contact with an electrical arc or dangerous substance.     |
| <b>Unusual Working Tool</b> | Select the category of tool associated with the unusual incident that started the accident. Define valid values on the XML Code Table page. |

## Employees Involved

| <i>Field or Control</i>   | <i>Description</i>                                                                                                                           |
|---------------------------|----------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Multiple Employees</b> | Select this check box to indicate that there were multiple employees involved in the accident.                                               |
| <b>Witness</b>            | Select this check box to indicate that there were witnesses to the accident. When you select this check box, the Witness Data field appears. |
| <b>Witness Data</b>       | Enter details about the witness. The system uses this value to populate the <datostes> tag in the XML file.                                  |

## Related Links

“Managing Delta Communications” (PeopleSoft Human Resources Administer Workforce)

## (ESP) Detailed RATS Data Page (Injury Details - Details)

Use the Detailed RATS Data (Injury Details - Details) page (HS\_RATS\_ESP\_SEC) to enter detailed data for RATS reporting.

Navigation:

Click the **Accident without sick note** link in the Spain section of the Injury Details - Details page.

This example illustrates the fields and controls on the Detailed RATS Data (Injury Details - Details) page. You can find definitions for the fields and controls later on this page.

**Detailed RATS Data** ✕

[Help](#)

**RATS Data**

\*Contact

No information

\*Body Part

Part of the body affected, without specifying

\*Injury

Type of not known injury or without specifying

## RATS Data

| <i>Field or Control</i> | <i>Description</i>                                                                                                                                                                                |
|-------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Contact</b>          | Select the contact type for the industrial accident. The system uses this value to populate the <contacto> tag in the XML file. Define valid values on the XML Code Table page.                   |
| <b>Body Part</b>        | Select the body part that was affected by the industrial accident. The system uses this value to populate the <parteleesion> tag in the XML file. Define valid values on the XML Code Table page. |
| <b>Injury</b>           | Select the injury type caused by the industrial accident. The system uses this value to populate the <tipolesion> tag in the XML file. Define valid values on the XML Code Table page.            |

## Related Links

“Managing Delta Communications” (PeopleSoft Human Resources Administer Workforce)

## Injury Details - 1st Aid Page

Use the Injury Details - 1st Aid page (HS\_INJ\_AID) to enter first aid and medical treatment information for all injured or ill individuals who are involved in the incident.

Navigation:

- **Workforce Monitoring > Health and Safety > Obtain Incident Information > Injury Details > 1st Aid**

- **Workforce Monitoring > Health and Safety > Obtain Incident Information > Injury Details BRA > 1st Aid**

This example illustrates the fields and controls on the Injury Details - 1st Aid page (1 of 3). You can find definitions for the fields and controls later on this page.

|        |             |            |         |                |           |              |           |
|--------|-------------|------------|---------|----------------|-----------|--------------|-----------|
| Injury | Description | Statements | Details | <b>1st Aid</b> | Diagnoses | Work-Related | Reporting |
|--------|-------------|------------|---------|----------------|-----------|--------------|-----------|

Incident Number 19120001      Date 01/01/2009      Incident Type Exposure

---

**Person Involved** Q | < < 1 of 1 > > | View All

|               |            |               |             |        |
|---------------|------------|---------------|-------------|--------|
| Empl ID       | KC0017     | Jessica Brown | Empl Record | 0      |
| Date of Birth | 02/10/1962 | Date of Death | Gender      | Female |

**Injury Details**

☐ Patient Taken To Hospital

☐ Fatal Injuries Sustained

☐ Resuscitation Required

☐ Ambulance Required

**Unconsciousness**

☐ Patient Fell Unconscious

|                      |                      |
|----------------------|----------------------|
| Hrs                  | Mins                 |
| <input type="text"/> | <input type="text"/> |

---

**First Aid and Medical Treatment** Q | < < 1 of 1 > > | View All

\*Date

\*Time

Employee  Q

Non-Employee  Q

**Treatment Type**

☒ First Aid   
 ☐ Medical   
 ☐ None

Description

This example illustrates the fields and controls on the Injury Details - 1st Aid page (2 of 3). You can find definitions for the fields and controls later on this page.

 Canada

**Worker First Aid Information**

First Aider Desig Sequence

How Worker Arrived First Aid 

Assisted by helper

How Worker Left First Aid 

Assisted by helper

☐ Attendant Observe Unconscious

**Ambulance Transportation Time**

Hours

Minutes

**Prior Conditions**

☐ Prior Disability 

Disability

☐ Prior Health Condition 

Condition

**Proximity**

Nearest Practitioner Distance

Nearest Hospital Distance

Nearest Hospital Name

This example illustrates the fields and controls on the Injury Details - 1st Aid page (3 of 3). You can find definitions for the fields and controls later on this page.

France

**Infirmiry Registration**

☐ Registered at Infirmiry

Date

Number

**Evacuation**

| < > 1 of 1 View All

Medical Facility

Where Taken

United Kingdom

☐ Hospitalized for over 24 hours

India

**Proximity**

Nearest Practitioner Distance

Nearest Hospital Distance

Nearest Hospital Name

| Field or Control                 | Description                                                                                                                                                                                                             |
|----------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Patient Taken To Hospital</b> | Select if the individual was taken to a hospital.                                                                                                                                                                       |
| <b>Fatal Injuries Sustained</b>  | If you select this check box, ensure that the primary outcome on the incident description page is death, and enter the date of death in the Workforce Administration business process if the individual is an employee. |
| <b>Resuscitation Required</b>    | Select if the individual required resuscitation.                                                                                                                                                                        |
| <b>Ambulance Required</b>        | If you select this check box, the system makes the <b>Ambulance Details</b> available. Click the link to access to the Ambulance Details page.                                                                          |
| <b>Patient Fell Unconscious</b>  | If you select this check box, the <b>Hrs</b> and <b>Mins</b> fields are available for entry. Enter the amount of time, in hours and minutes, that the individual remained unconscious.                                  |



| <b>Field or Control</b>             | <b>Description</b>                                                                                                                                                       |
|-------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Date and Time</b>                | Enter the date and time when first aid or medical treatment was provided.                                                                                                |
| <b>Employee and Non-Employee</b>    | When you add a data row, both of these fields are available. Select either the employee ID or non-employee ID of the person who provides first aid or medical treatment. |
| <b>First Aid, Medical, and None</b> | Select the appropriate option to indicate the type treatment that was provided.                                                                                          |

### (CAN) Canada

| <b>Field or Control</b>                                            | <b>Description</b>                                                                                                                                                                                                                                                                                                                                                               |
|--------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>First Aider Desig Sequence</b> (first aider designate sequence) | Select a designate (first aider) who treated or assisted the injured or ill person. The available values and sequence numbers come from the Injury Details - Injury page.                                                                                                                                                                                                        |
| <b>How Worker Arrived First Aid</b>                                | Select the mode of transportation that was used to bring the injured or ill worker to the designate.                                                                                                                                                                                                                                                                             |
| <b>How Worker Left First Aid</b>                                   | Select the mode of transportation was used to take the injured or ill person away, if applicable.                                                                                                                                                                                                                                                                                |
| <b>Attendant Observe Unconscious</b>                               | If you select the <b>Patient Fell Unconscious</b> check box on the primary page, then this check box is available for data entry. Indicate that the designate (first aider) observed that the injured person was unconscious at the time treatment was given.                                                                                                                    |
| <b>Hours and Minutes</b>                                           | <p>Enter the ambulance transportation time in hours or minutes or both. This is the amount of time that the ambulance took to transport the injured or ill person to the hospital.</p> <hr/> <p><b>Note:</b> In the context of operations and incidents that occur within the CANBC regulatory region, <i>Ambulance</i> specifically means British Columbia Ambulance.</p> <hr/> |

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

**(FRA) France**

| <b>Field or Control</b>        | <b>Description</b>                                                                                                                                                                                                                                                                                                                                             |
|--------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Registered at Infirmary</b> | Select if the injured or ill person was registered at an infirmary.                                                                                                                                                                                                                                                                                            |
| <b>Date and Number</b>         | Enter the date of registration in the infirmary and the registration number.                                                                                                                                                                                                                                                                                   |
| <b>Medical Facility</b>        | <p>Select the medical facility to which the injured or ill person was taken. Values come from the Medical Facilities table.</p> <p>If the injured or ill person was taken to a location that is not a medical facility in the system, then bypass the Medical Facility field, and describe where the individual was taken in the <b>Where Taken</b> field.</p> |

**(GBR) United Kingdom**

| <b>Field or Control</b>               | <b>Description</b>                                                        |
|---------------------------------------|---------------------------------------------------------------------------|
| <b>Hospitalized for over 24 hours</b> | Indicate if the injured or ill person was hospitalized for over 24 hours. |

**(IND) India**

| <b>Field or Control</b>              | <b>Description</b>                                                                                       |
|--------------------------------------|----------------------------------------------------------------------------------------------------------|
| <b>Nearest Practitioner Distance</b> | Enter the distance from the establishment to the nearest medical practitioner at the time of the injury. |
| <b>Nearest Hospital Distance</b>     | Enter the distance from the establishment to the nearest hospital at the time of the injury.             |
| <b>Nearest Hospital Name</b>         | Enter the name of the nearest hospital at the time of the injury.                                        |

**Injury Details - Diagnoses Page**

Use the Injury Details - Diagnoses page (HS\_INJ\_DIAGNOSIS) to record details about the physician, hospital or clinic, and the medical diagnoses that are involved with the injured and ill employees.

Navigation:

- **Workforce Monitoring > Health and Safety > Obtain Incident Information > Injury Details > Diagnoses**
- **Workforce Monitoring > Health and Safety > Obtain Incident Information > Injury Details BRA > Diagnoses**

This example illustrates the fields and controls on the Injury Details - Diagnoses page (1 of 3). You can find definitions for the fields and controls later on this page.

The screenshot displays the 'Injury Details - Diagnoses' page for Incident Number 19120001, dated 01/01/2009, with Incident Type 'Exposure'. The page is divided into several sections:

- Person Involved:** Displays employee information for Jessica Brown (Empl ID: KC0017, Date of Birth: 02/10/1962, Gender: Female, Empl Record: 0).
- Physician/Hospital Information:** Shows details for the attending physician, Philip McCleary (Physician ID: 0000000013). The Type of Health Care is set to 'Company Physician'. Fields for Medical Facility and Phone are also present.
- Medical Diagnoses:** A list of medical diagnoses is shown, with the first entry being 'Stress' (Diagnosis ID: K00016).

This example illustrates the fields and controls on the Injury Details - Diagnoses page (2 of 3). You can find definitions for the fields and controls later on this page.

India

**Disablement**

Type of Disablement

**Partial/Total**

Disablement Code 
Pct Loss of Earnings 0

**Occupational Illness**

Illness

**Others**

Additional Descr

This example illustrates the fields and controls on the Injury Details - Diagnoses page (3 of 3). You can find definitions for the fields and controls later on this page.

**Physician Recommendations**

**Job**

Type 
Start Date 
End Date

**Leave Details**

Type 
From Date 
To Date

**Approval**

**Approver**

☒ Employee ID
 ☐ Physician ID

Emplid 
Approval Date

Spain  
 Accident with sick note

| Field or Control    | Description                                                                                                                                           |
|---------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------|
| Type of Health Care | Select the type of health care, such as <i>Emergency Care</i> or <i>Ongoing Health Care</i> , that the individual received at the hospital or clinic. |

| <b>Field or Control</b> | <b>Description</b>                                                                                                                                                                                                                                                             |
|-------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Physician ID</b>     | Select a physician ID for the doctor or other medical specialist who treated the injured or ill person. The associated name appears.                                                                                                                                           |
| <b>Medical Facility</b> | Select a medical facility where the injured or ill person was treated. The name of the facility appears.                                                                                                                                                                       |
| <b>View Address</b>     | Click this link to access the Injury Details - Diagnoses: Medical Facility Address page. This page is read-only. Use the Medical Facilities Table page (HS_MEDICAL_FAC ) to edit medical facility address information.                                                         |
| <b>Diagnosis</b>        | <p>When you know the results of the physician's medical diagnosis, select a diagnosis code. Define these codes in the Diagnosis table. If you do not know this information now, enter it at a later date.</p> <p>Insert a new data row for each additional diagnosis code.</p> |

## (IND) India

| <b>Field or Control</b>                                | <b>Description</b>                                                                                                                                                                                                   |
|--------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Type of Disablement</b>                             | Select if the type of disablement is <i>Permanent Partial Disablement</i> , <i>Permanent Total Disablement</i> , due to an <i>Occupational Disease/Illness</i> , or due to <i>Other</i> reasons.                     |
| <b>Disablement Code</b>                                | If the type of disablement is permanent partial disablement or permanent total disablement, select the appropriate code. Disablement codes are defined on the Disablement Types IND ( Disablement Types India) page. |
| <b>Pct Loss of Earnings</b> (percent loss of earnings) | The percentage of loss of earnings for the selected disablement code appears. This percentage is defined on the Disablement Types IND page.                                                                          |
| <b>Illness</b>                                         | If the type of disablement is an occupational disease or illness, select the type of illness.                                                                                                                        |
| <b>Additional Descr</b> (additional description)       | If the type of disablement is due to some other reason, enter a description of the disablement type here.                                                                                                            |
| <b>Type</b> (for Job)                                  | Select if the physician recommended an <i>Alternate Job</i> or <i>Light Work</i> .                                                                                                                                   |

| <b>Field or Control</b>         | <b>Description</b>                                                                         |
|---------------------------------|--------------------------------------------------------------------------------------------|
| <b>Start Date</b>               | Enter the start date of the alternate job or light work job.                               |
| <b>End Date</b>                 | Enter the end date of the alternate job or light work job.                                 |
| <b>Type</b> (for Leave Details) | Select if the physician recommended <i>Accident Leave</i> or <i>Special Leave</i> .        |
| <b>From Date</b>                | Enter the start date of the leave.                                                         |
| <b>To Date</b>                  | Enter the end date of the leave.                                                           |
| <b>Employee ID</b>              | Select if an employee approved the physician recommendations and select the employee's ID. |
| <b>Physician ID</b>             | Select if a physician approved the recommendations and select the physician's ID.          |
| <b>Approval Date</b>            | Enter the date that the physician's recommendations are approved.                          |

### (ESP) Spain

| <b>Field or Control</b>        | <b>Description</b>                                                                                                                                                                                                                                                                                               |
|--------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Accident with sick note</b> | The <b>Accident with sick note</b> link appears only if the incident type is <i>PAT</i> . Click the link to access the Detailed PAT Data page, where you must enter details about the employee, employer, and place of accident for the PAT incident. The system displays this link only for PAT incident types. |

### (ESP) Detailed PAT Data Page (Injury Details - Diagnoses)

Use the Detailed PAT Data (Injury Details - Diagnoses) page (HS\_PAT3\_ESP\_SEC) (ESP) to specify medical assistance and economic data for PAT incidents.

Navigation:

Click the **Accident with sick note** link in the Spain section of the Injury Details - Diagnoses page.

This example illustrates the fields and controls on the Detailed PAT Data (Injury Details - Diagnoses) page. You can find definitions for the fields and controls later on this page.

Detailed PAT Data

Help

Medical Assistance

\*Injury Grade

High Damage

\*Injury

029

Other types of fractures of bones

\*Body Part

12

Face Zone

Type of medical Assistance

☒ Hospital

☐ Ambulatory

☐ Hospitalized

Economic Data

Get GP Data

Monthly Contribution Base

\*Previous Month Base

\*Contribution Days

Regulatory Daily Base

Annual Contribution Bases

Contribution Overtime

Other Concepts Base

Average Daily Base

Total Daily Regulatory Base

Benefit

OK

Cancel

Medical Assistance

Use this group box to specify details about the medical assistance that the person received for the injury caused by the accident.

| Field or Control | Description                                                                                                                                                                                       |
|------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Injury Grade     | Select the severity of the injury according to Spanish social security administration codes. Your choices are <i>Low Damage</i> , <i>High Damage</i> , <i>Very High Damage</i> and <i>Death</i> . |
| Injury           | Select the injury for which the person received medical assistance. Define valid values on the XML Code Table page.                                                                               |
| Body Part        | Select the body part for which the person received medical assistance. Define valid values on the XML Code Table page.                                                                            |

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| <b>Field or Control</b>           | <b>Description</b>                                                                                                 |
|-----------------------------------|--------------------------------------------------------------------------------------------------------------------|
| <b>Type of Medical Assistance</b> | Select the whether the person received medical assistance for the injury from a hospital or an ambulatory service. |

## Economic Data

Use this group box to enter or load monthly and annual information for benefits calculations.

| <b>Field or Control</b>                                       | <b>Description</b>                                                                                                                                                                                                 |
|---------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Get GP Data</b>                                            | Click this button to load the contribution base values from tables in the core Global Payroll application.                                                                                                         |
| <b>Previous Month Base</b>                                    | Enter the previous monthly base amount for a full time employee or the previous three months base for a part time employee.                                                                                        |
| <b>Contribution Days</b>                                      | Enter the number of contribution days, one month for an employee or three months for a part time employee, previous to the industrial accident. The system uses this value to fill the <dias> tag in the XML file. |
| <b>Regulatory Daily Basis and Total Daily Regulatory Base</b> | Displays the calculated daily regulatory base by dividing the previous base amount by the contribution days.                                                                                                       |
| <b>Contribution Overtime</b>                                  | Enter the annual contribution base due to overtime. The system uses this value to fill the <b1> tag in the XML file.                                                                                               |

## Related Links

“Managing Delta Communications” (PeopleSoft Human Resources Administer Workforce)

## Injury Details - Work-Related Page

Use the Injury Details - Work-Related page (HS\_INJ\_WORK) to record if the incident occurred while the person was involved in a work-related activity.

Navigation:

- **Workforce Monitoring > Health and Safety > Obtain Incident Information > Injury Details > Work-Related**
- **Workforce Monitoring > Health and Safety > Obtain Incident Information > Injury Details BRA > Work-Related**



This example illustrates the fields and controls on the Injury Details - Work-Related page (1 of 3). You can find definitions for the fields and controls later on this page.

Injury
Description
Statements
Details
1st Aid
Diagnoses
**Work-Related**
Reporting

Incident Number 19120001
Date 01/01/2009
Incident Type Exposure

**Person Involved**

Empl ID KC0017
**Jessica Brown**
Empl Record 0

Date of Birth 02/10/1962
Date of Death
Gender Female

Last Work Date Before Injury
LastWorked

Return Date
Return Time

\*Illness Resulted In Not Applicable
☒ Work-Related
☐ Employee Return To Work

**Work Days**

Days Away From Work
Restricted Workdays

Temp Transfer Work Days
☒ Enter Detailed Dates

**Data**

|   | *Start Date | End Date | Type | Comment |
|---|-------------|----------|------|---------|
| 1 | 05/21/2020  |          |      |         |

USA

OSHA Days Away As Of Today
OSHA Days Restricted/Transferred

This example illustrates the fields and controls on the Injury Details - Work-Related page (2 of 3). You can find definitions for the fields and controls later on this page.

Canada

☐ Payments during disability
Payments Descr
250 characters remaining

☐ Benefits continue
Last Day Scheduled Start Time
Last Day's Wages 0.00

Last Day Scheduled End Time
☐ Shift Differential Premium

Shift Diff Premium Amount
Differential Premium Ind

☐ Lump Sum Holiday Pay Received
Holiday Pay Rate %

☐ Absent after day of injury
Work after init absence St Dt
Work after init absence end dt

Customer Cost Center
☐ Off Work Vacation Pay

Class/Subclass

Wage Additions
Wage Inclusions
Actions
Return To Work

Long Term Earnings
WCB Form 7 Details
Work Information

Germany

**Payments**

☐ Payments Continue
Until Date

**Work**

☐ Work After Start
Work Stop

Stop Date

This example illustrates the fields and controls on the Injury Details - Work-Related page (3 of 3). You can find definitions for the fields and controls later on this page.

**France**

**Consequences**

☐ None

☐ Stop Work

☐ Reject Claim

☐ Change Job

**Physical Disability**

Period

Amount %

Notify Date

**India**

**Work Related Information**

**Shift Details**

Shift

Supervisor ID

Start Time

End Time

**Mexico**

☐ IMSS ST7 Form

| Field or Control                                   | Description                                                                                                                                                                                                                                                                                                                                                    |
|----------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Last Work Date Before Injury and LastWorked</b> | <p>If the employee spent time away from work, enter the date and time of the employee's last day at work.</p> <hr/> <p><b>Note:</b> (CAN) The <b>Last Work Date Before Injury</b> field is required for reporting to the BC WCB.</p> <hr/>                                                                                                                     |
| <b>Return Date and Return Time</b>                 | If the employee spent time away from work, enter the date and time of the employee's first day back at work after the incident.                                                                                                                                                                                                                                |
| <b>Illness Resulted In</b>                         | Select from the available options to indicate if the injury or illness resulted in <i>Transfer</i> , <i>Termination</i> , or is <i>Not Applicable</i> .                                                                                                                                                                                                        |
| <b>Work-Related</b>                                | Select if the incident is work-related.                                                                                                                                                                                                                                                                                                                        |
| <b>Employee Return To Work</b>                     | Select if the employee returned to work after the incident.                                                                                                                                                                                                                                                                                                    |
| <b>Days Away From Work</b>                         | <p>If the employee spent time away from work as a result of the incident, enter the number of days that the employee is away from work.</p> <hr/> <p><b>Note:</b> Some government authorities have very precise definitions of days away from work and restricted workdays. Ensure that you use the definitions that apply to the regulatory region.</p> <hr/> |
| <b>Restricted Workdays</b>                         | Enter the number of days that the employee is able to work within limitations that a doctor established.                                                                                                                                                                                                                                                       |

| <b>Field or Control</b>               | <b>Description</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|---------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Enter Detailed Dates</b>           | Select this check box to enable entry of detailed dates. If the box is deselected, only the <b>Days Away From Work</b> and <b>Restricted Workdays</b> fields are editable and the detailed dates grid is not editable. When the box is selected, the detail dates grid is editable and the <b>Days Away From Work</b> and <b>Restricted Workdays</b> fields are automatically updated to show the total days from the detail dates.                                                                                                                                                                                                      |
| <b>Start Date, End Date, and Type</b> | <p>Select from the available options to provide more detail about the time away from work due to an injury. The <b>Days Away from Work</b> and the <b>Restricted Workdays</b> are automatically updated depending on the type that is selected. For example, if the type is <i>Away from Work Due to Injury</i>, the <b>Days Away from Work</b> field is automatically updated with the number of days entered in the <b>Start Date</b> and <b>End Date</b> fields.</p> <hr/> <p><b>Important!</b> (USA) When a U.S. employee is terminated, you need to enter the work related end date here for the injury details incident.</p> <hr/> |

## (USA) USA

| <b>Field or Control</b>                                                                                 | <b>Description</b>                                                                                                                                                                                                                                                                                                                                                                                                                 |
|---------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>OSHA Days Away As Of Today</b> (occupational safety and health administration days away as of today) | <p>Displays the total number of calendar days included in the start and end date periods specified in the Data group box, when the selected type is <i>Away from Work Due to Injury</i>.</p> <p>For example, if there are two rows set to the <i>Away from Work Due to Injury</i> type, and the specified date periods are Jan 1 through Jan 2, and Jan 5 through Jan 6 respectively. The value displayed for this field is 4.</p> |
| <b>OSHA Days Restricted/Transferred</b>                                                                 | <p>Displays the total number of calendar days included in the start and end date periods specified in the Data group box, when the selected type is <i>Temp. Transfer Due to Injury</i>.</p> <p>For example, if there is a row set to the <i>Temp. Transfer Due to Injury</i> type, and the specified date period Jan 1 through Jan 15. The value displayed for this field is 15.</p>                                              |

**(CAN) Canada**

| <b>Field or Control</b>                                                            | <b>Description</b>                                                                                                                                                                                                                                              |
|------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Payments during disability</b> and <b>Payments Descr</b> (payments description) | Select if the employee is receiving payments and then describe the payments in the <b>Payments Descr</b> field.                                                                                                                                                 |
| <b>Benefits continue</b>                                                           | Select if the employee's benefits are continuing.                                                                                                                                                                                                               |
| <b>Last Day Scheduled Start Time</b> and <b>Last Day Scheduled End Time</b>        | Record information about lost work time.                                                                                                                                                                                                                        |
| <b>Last Day's Wages</b>                                                            | Enter the wages of the employee's last day.                                                                                                                                                                                                                     |
| <b>Shift Diff Premium Amount</b> (shift differential premium amount)               | Enter the amount of the shift differential premium.                                                                                                                                                                                                             |
| <b>Differential Premium Ind</b> (differential premium indicator)                   | Select the unit of measure for the differential premium amount. Valid values are <i>Day</i> and <i>Hours</i> .                                                                                                                                                  |
| <b>Lump Sum Holiday Pay Received</b>                                               | Select if the employee received lump sum holiday pay.                                                                                                                                                                                                           |
| <b>Holiday Pay Rate %</b> (holiday pay rate percent)                               | If the employee received lump sum holiday pay, enter the pay rate percentage.                                                                                                                                                                                   |
| <b>Absent after day of injury</b>                                                  | Select if the employee missed work after the injury and then enter the <b>Start Date</b> and <b>End Date</b> for the period of absence.                                                                                                                         |
| Off Work Vacation Pay                                                              | Select to continue to accrue vacation pay for the employee associated with the work-related incident while he or she is off work.                                                                                                                               |
| <b>Customer Cost Center</b>                                                        | Enter the employer's Customer Cost Center code that represents the cost center that the individual is in. The Customer Cost Center code is assigned by the WBC in conjunction with the employer and helps to track claim costs at a given organizational level. |
| <b>Class/Subclass</b>                                                              | Select the correct class or subclass for the employee's business unit. Use the proper WCB classification for the business.                                                                                                                                      |

**Note:** (CAN) To enter additional information that is needed for reporting to the WCB, click the links at the bottom of the page to open additional Canada pages.

**(CAN) Canada**

This table lists the required fields for British Columbia users:

| <b><i>Incident Outcome</i></b>    | <b><i>Required Fields</i></b>                                                                                                                     |
|-----------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------|
| Reported only                     | Last Day's Wages<br>Class/Subclass                                                                                                                |
| Health care only                  | Last Day's Wages<br>Last Work Date Before Injury<br>Last/Worked<br>Class/Subclass                                                                 |
| Short-term disability or fatality | Last Work Date Before Injury<br>Last/Worked<br>Last Day Scheduled Start Time<br>Last Day Scheduled End Time<br>Last Day's Wages<br>Class/Subclass |

**(DEU) Germany**

| <b><i>Field or Control</i></b> | <b><i>Description</i></b>                                                                                                                                                 |
|--------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Payments Continue</b>       | If the employee has the right to collect compensation payments, select this check box and enter the date when the payments stop in the <b>Until Date</b> field.           |
| <b>Work After Start</b>        | Select this check box if the employee resumed working after an illness.                                                                                                   |
| <b>Work Stop</b>               | If the employee no longer works for the organization, select the appropriate work stop time. Values are <i>None</i> , <i>Immediately</i> , <i>Later</i> , and <i>No</i> . |
| <b>Stop Date</b>               | Enter the date when the employee stopped working.                                                                                                                         |

**(FRA) France**

| <b>Field or Control</b>          | <b>Description</b>                                                                                                                          |
|----------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Consequences</b>              | Indicate the actions taken by the employer in response to the injury or illness.                                                            |
| <b>Period</b>                    | Select whether the period of disability for the injured or ill employee is a <i>Permanent Disability</i> or a <i>Temporary Disability</i> . |
| <b>Amount %</b> (amount percent) | Indicate the estimated degree of disability, which is determined by a doctor or medical specialist.                                         |
| <b>Notify Date</b>               | Enter the date that the employer is notified regarding the employee's disability.                                                           |

**(IND) India**

| <b>Field or Control</b>        | <b>Description</b>                                                                                                                                                                                                                                                                                                                                                                   |
|--------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Shift</b>                   | Select <i>General Shift</i> , <i>Shift One</i> , <i>Shift Two</i> , or <i>Shift Three</i> .<br><br>For example, if the organization has a day shift and a night shift, you can use <i>Shift One</i> for the day shift and <i>Shift Two</i> for the night shift. If the organization has more than two shifts, you can use <i>Shift Three</i> , depending on the timing of the shift. |
| <b>Supervisor ID</b>           | Select the employee ID of the employee's shift supervisor.                                                                                                                                                                                                                                                                                                                           |
| <b>Start Time and End Time</b> | Enter the employee's shift start and end time.                                                                                                                                                                                                                                                                                                                                       |

**Long Term Earnings Page**

Use the Long Term Earnings page (HS\_INJ\_LTECAN\_SEC) (CAN) to enter additional information about long term earnings for Canadian employees who have work-related injuries or illnesses.

Navigation:

Click the **Long Term Earnings** link in the Canada section of the Injury Details - Work-Related page.

This example illustrates the fields and controls on the Long Term Earnings page. You can find definitions for the fields and controls later on this page.

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

| <b>Field or Control</b>                      | <b>Description</b>                                                                                                                                                                   |
|----------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Sequence Number</b>                       | In the records that are on this page, the dates appear by default to three months prior to the injury for sequence number 1 and 12 months prior to the injury for sequence number 2. |
| <b>Amount</b>                                | Enter the amount of earnings for the periods that are in each sequence.                                                                                                              |
| <b>Three Month Wage Duration</b>             | Indicate whether the long-term earning amount represents wages accumulated over 12 weeks or three months.                                                                            |
| <b>Period Start Date and Period End Date</b> | If the person is not with the organization for either the entire three-month period or the entire twelve-month period, enter the period start date and the period end date.          |
| <b>Date Change Reason</b>                    | When you enter period start and end dates, you must provide a reason for the date changes.                                                                                           |

## Return To Work Page

Use the Return To Work page (HS\_INJ\_RTWCAN\_SEC) (CAN) to enter additional return-to-work details for Canadian employees who are injured or ill in work-related incidents.

Navigation:

Click the **Return to Work** link in the Canada section of the Injury Details - Work-Related page.

This example illustrates the fields and controls on the Return To Work page. You can find definitions for the fields and controls later on this page.

| <i>Field or Control</i>              | <i>Description</i>                                                                               |
|--------------------------------------|--------------------------------------------------------------------------------------------------|
| <b>Employer Consider Return</b>      | Select to indicate that the employer is considering a graduated return to work for the employee. |
| <b>Modified Work Available</b>       | Select to indicate that modified work is available for the employee.                             |
| <b>Return to Work At Full Salary</b> | Select to indicate that the injured employee is to return to work at his or her full salary.     |
| <b>Contact</b>                       | Enter the name of the contact for the employee's return to work.                                 |

## Work Information Page

Use the Injury Details - Work Information page (WCB\_WORK\_INFO\_SEC) (CAN) to enter additional work information for employees who are injured or ill in work-related incidents.

Navigation:

Click the **Work Information** link in the Canada section of the Injury Details - Work-Related page.



This example illustrates the fields and controls on the Work Information page. You can find definitions for the fields and controls later on this page.

Work Information

Work Schedule Type Code

Fixed Rotation Start Date

Shift Cycle

Shift Cycle One

Days ON

Days OFF

Shift Cycle Two

Days ON

Days OFF

Shift Cycle Three

Days ON

Days OFF

Shift Cycle Four

Days ON

Days OFF

Shift Cycle Five

Days ON

Days OFF

More than Five Shift Cycles

Employment Term

Short Term Basis

Less Than Three Months

Temporary Basis

On Call

Other Employment Service

Start Date

End Date

End Date Unknown

Days Normally Worked

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

Sunday

| Field or Control          | Description                                                                                                                                                                                                                                                   |
|---------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Work Schedule Type Code   | Specify the type of work schedule that the employee works. Values are <i>FIXED</i> , <i>ROTATING</i> , and <i>VARIABLE</i> . If you select <i>FIXED</i> , the Fixed Rotation Start Date field and all fields in the Shift Cycle group box become unavailable. |
| Fixed Rotation Start Date | Enter the shift cycle start date, which is the date on which the shift rotation begins.                                                                                                                                                                       |

Shift Cycle

| Field or Control     | Description                                                                                                                     |
|----------------------|---------------------------------------------------------------------------------------------------------------------------------|
| Days ON and Days OFF | For each shift cycle, starting with the shift cycle start date, enter the number of days that the employee was on and off work. |

| <b>Field or Control</b>            | <b>Description</b>                                                                     |
|------------------------------------|----------------------------------------------------------------------------------------|
| <b>More than Five Shift Cycles</b> | Select to indicate that there are more than five shift cycles associated with the job. |

## Employment Term

| <b>Field or Control</b>         | <b>Description</b>                                                                                                                                           |
|---------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Short Term Basis</b>         | Select if the employee is employed on a short-term basis.                                                                                                    |
| <b>On Call</b>                  | Select if the employee is employed on an on-call basis.                                                                                                      |
| <b>Less Than Three Months</b>   | Select if the employee is employed for less than three months.                                                                                               |
| <b>Other Employment Service</b> | Select if the employee works for another employment service.                                                                                                 |
| <b>Temporary Basis</b>          | Select if the employee is employed on a temporary basis. If you select this radio button, the <b>Start Date</b> and <b>End Date</b> fields become available. |
| <b>Start Date and End Date</b>  | Enter the start date and end date for the employee's temporary employment term.                                                                              |
| <b>End Date Unknown</b>         | Select this check box if you do not know the end date for the employee's temporary employment term.                                                          |

## Days Normally Worked

Use the check boxes in this group box to indicate on which days of the week the employee normally worked.

## Injury Details - Reporting Page

Use the Injury Details - Reporting page (HS\_INJ\_REPORT) to track if incidents are reportable under the terms of an authority of a regulatory region.

Navigation:

- **Workforce Monitoring > Health and Safety > Obtain Incident Information > Injury Details > Reporting**
- **Workforce Monitoring > Health and Safety > Obtain Incident Information > Injury Details BRA > Reporting**

This example illustrates the fields and controls on the Injury Details - Reporting page (1 of 2). You can find definitions for the fields and controls later on this page.

| Injury                                                                                                                                                                                       | Description | Statements      | Details | 1st Aid       | Diagnoses | Work-Related | Reporting |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|-----------------|---------|---------------|-----------|--------------|-----------|
| Incident Number 19120001                                                                                                                                                                     |             | Date 01/01/2009 |         | Incident Type |           | Exposure     |           |
| <b>Person Involved</b> <input type="text"/>   < > 1 of 1 >   View All                                                                                                                        |             |                 |         |               |           |              |           |
| Empl ID KC0017                                                                                                                                                                               |             | Jessica Brown   |         | Empl Record 0 |           |              |           |
| Date of Birth 02/10/1962                                                                                                                                                                     |             | Date of Death   |         | Gender Female |           |              |           |
| <input type="checkbox"/> Further Inquiry<br><input type="checkbox"/> Reportable Case<br>▼  DEU - Germany                                                                                     |             |                 |         |               |           |              |           |
| Case Number <input type="text"/><br>Case Officer ID<br>Date Filed <input type="text"/><br>Reject Reason <input type="text"/> ▼<br>Employer Social Insurance Nbr <input type="text"/>         |             |                 |         |               |           |              |           |
| ▼  USA                                                                                                                                                                                       |             |                 |         |               |           |              |           |
| OSHA Case Nbr <input type="text"/> <input type="checkbox"/> Privacy Case<br>Date Filed <input type="text"/><br>Illness Type Occupational Skin Disease ▼<br>Log Comments <input type="text"/> |             |                 |         |               |           |              |           |
| ▼  Australia                                                                                                                                                                                 |             |                 |         |               |           |              |           |
| Case Number <input type="text"/> Date Filed <input type="text"/>                                                                                                                             |             |                 |         |               |           |              |           |

This example illustrates the fields and controls on the Injury Details - Reporting page (2 of 2). You can find definitions for the fields and controls later on this page.

New Zealand

Case Number

Date Filed

India

Reporting Details

Inspection Information

Inspector Name

Inspector Title

Inspection Date

Inspection Time

Corrective or Preventive Actn

Action

Officer Responsible

Date of Action

Reporting Information

Reported To Empl ID

Employer Designate ID

Dept ID

Insurance Information

Insurance Number

Insurance Date

| Field or Control | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Further Inquiry  | Select if additional inquiry is required to determine if this is a reportable case.                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| Reportable Case  | <p>Select if the incident is reportable under the terms of one or more authorities in one or more regulatory regions. Even if there are no regulatory requirements at the location for tracking reportable cases, you can track whether the case is reportable based upon insurer requirements or the requirements of the organization.</p> <p>If you do not need to report this particular case based upon the requirements for the regulatory region, the insurer, or the organization, then deselect the <b>Reportable Case</b> check box.</p> |

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

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

### (DEU) Germany

| <i><b>Field or Control</b></i> | <i><b>Description</b></i>                                                                                                                                                                                                                                                                                                                                                                            |
|--------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Case Number</b>             | <p>Enter the official report case number.</p> <hr/> <p><b>Note:</b> If the government, insurer, or organization uses a standard system for numbering cases, you can set up HR so that it assigns the numbers automatically.</p> <hr/>                                                                                                                                                                |
| <b>Case Officer ID</b>         | The case officer ID from the Case Officer Assignment page (for the person who is involved in the incident). Case officers are set up for particular setIDs and locations using the Case Officer Table DEU page. Individuals are designated as case officers on the Employee page. Case officers are assigned to individuals who are involved in incidents by using the Case Officer Assignment page. |
| <b>Date Filed</b>              | Enter the date that the report is filed with the insurer. This information is used in the DEU accident report.                                                                                                                                                                                                                                                                                       |
| <b>Reject Reason</b>           | Select any reason that the insurer gave for rejecting the claim, if applicable.                                                                                                                                                                                                                                                                                                                      |

### (USA) United States

| <i><b>Field or Control</b></i>                                                   | <i><b>Description</b></i>                                                                                                                                                                                                |
|----------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>OSHA Case Nbr</b> (occupational safety and health administration case number) | Enter the case number; the system uses it in the OSHA 200 Occupational Injury and Illness report (OHS001).                                                                                                               |
| <b>Privacy Case</b>                                                              | Select to mark the incident as private. This is to comply with an OSHA requirement. Private cases do not display the employee's name on any reports but maintain the name in the system in case it is requested by OSHA. |
| <b>Date Filed</b>                                                                | Enter the date that the reportable case is entered into the OSHA Form 200 Injury and Illness Recordkeeping Log.                                                                                                          |

| <b>Field or Control</b> | <b>Description</b>                                                                                                                                                                                |
|-------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Illness Type</b>     | If the person has a work-related illness, select an appropriate type of illness. OSHA defines these illness types.                                                                                |
| <b>Log Comments</b>     | You can enter comments that are exactly the length of the field as it appears on the page. This length matches the length for comments on the OSHA Form 200 Injury and Illness Recordkeeping Log. |

**(AUS) Australia**

| <b>Field or Control</b> | <b>Description</b>     |
|-------------------------|------------------------|
| <b>Case Number</b>      | Enter the case number. |

**(NZL) New Zealand**

| <b>Field or Control</b> | <b>Description</b>     |
|-------------------------|------------------------|
| <b>Case Number</b>      | Enter the case number. |

**(IND) India**

| <b>Field or Control</b>                                                | <b>Description</b>                                                                          |
|------------------------------------------------------------------------|---------------------------------------------------------------------------------------------|
| <b>Inspector Name</b>                                                  | Enter the name of the person who is doing the inspection.                                   |
| <b>Inspector Title</b>                                                 | Enter the title of the inspector.                                                           |
| <b>Inspection Date</b>                                                 | Enter the date of the inspection.                                                           |
| <b>Inspection Time</b>                                                 | Enter the time of the inspection.                                                           |
| <b>Corrective or Preventive Actn</b> (corrective or preventive action) | Select if the inspector has directed <i>Corrective Action</i> or <i>Preventive Action</i> . |
| <b>Action</b>                                                          | Enter the specifics of the corrective or preventive action.                                 |

| <b>Field or Control</b>                              | <b>Description</b>                                                                                          |
|------------------------------------------------------|-------------------------------------------------------------------------------------------------------------|
| <b>Date of Action</b>                                | Enter the date by which the corrective or preventive action must be completed.                              |
| <b>Officer Responsible</b>                           | Enter the name of the officer who is responsible for the completion of the corrective or preventive action. |
| <b>Reported to Empl ID</b> (reported to employee ID) | Select the ID of the employee to whom the injury is reported.                                               |
| <b>Employer Designate ID</b>                         | Enter the ID of the person in the organization who received the information about the injured employee.     |
| <b>Dept ID</b>                                       | Select the department ID to which the employer designate belongs.                                           |
| <b>Insurance Number</b>                              | Enter the employee's insurance number.                                                                      |
| <b>Insurance Date</b>                                | Enter the effective date of the employee's insurance.                                                       |

## Injury Details - Details BRA Page

Use the Injury Details - Details BRA page (HS\_INJURY\_BRA) to enter injury details for Brazil.

This information is used on the Work Risk report for Brazil.

Navigation:

**Workforce Monitoring > Health and Safety > Obtain Incident Information > Injury Details  
BRA > Details BRA**

This example illustrates the fields and controls on the Details BRA page (1 of 2).

| Injury                                                                                                          | Description | Statements           | Details | 1st Aid                                       | Diagnoses | Work-Related              | Reporting | Details BRA |
|-----------------------------------------------------------------------------------------------------------------|-------------|----------------------|---------|-----------------------------------------------|-----------|---------------------------|-----------|-------------|
| Incident Number 20045625                                                                                        |             | Date 08/01/2016      |         | Incident Type Accident                        |           |                           |           |             |
| <div> <div>Injury Details</div> <div> <input type="text"/> <div>1 of 1</div> <div>View All</div> </div> </div>  |             |                      |         |                                               |           |                           |           |             |
| Empl ID                                                                                                         |             | Empl Record 0        |         | <div>+</div> <div>-</div>                     |           |                           |           |             |
| Non-Empl ID                                                                                                     |             | Date of Birth        |         | Date of Death                                 |           | Gender                    |           |             |
| Date of Birth                                                                                                   |             | Date of Death        |         | Date of Death                                 |           | Gender                    |           |             |
| Area Type                                                                                                       |             | Urban                |         |                                               |           |                           |           |             |
| *INSS Type                                                                                                      |             | Employee             |         |                                               |           |                           |           |             |
| Worked Hours                                                                                                    |             | <input type="text"/> |         |                                               |           |                           |           |             |
| *CID Code                                                                                                       |             | <input type="text"/> |         |                                               |           |                           |           |             |
| <input type="checkbox"/> Retired                                                                                |             |                      |         |                                               |           |                           |           |             |
| <div> <div>CAT Information</div> <div> <input type="text"/> <div>1 of 1</div> <div>View All</div> </div> </div> |             |                      |         |                                               |           |                           |           |             |
| *CAT ID                                                                                                         |             | <input type="text"/> |         | <input type="checkbox"/> CAT Partial          |           | <div>+</div> <div>-</div> |           |             |
| *Date                                                                                                           |             | 08/01/2016           |         | <input type="checkbox"/> Certificate of Death |           |                           |           |             |
| CAT Type                                                                                                        |             | <input type="text"/> |         | <input type="checkbox"/> Death                |           |                           |           |             |
| eSocial Accident Tp                                                                                             |             | <input type="text"/> |         |                                               |           |                           |           |             |
| Death Date                                                                                                      |             | <input type="text"/> |         | CNES                                          |           | <input type="text"/>      |           |             |

This example illustrates the fields and controls on the Details BRA page (2 of 2).

|                                                                                                                       |                      |                   |                      |
|-----------------------------------------------------------------------------------------------------------------------|----------------------|-------------------|----------------------|
| Last Work Date                                                                                                        | <input type="text"/> | Last Worked       | <input type="text"/> |
| Absence Indicator                                                                                                     | <input type="text"/> |                   |                      |
| CAT Register ID                                                                                                       | <input type="text"/> | CAT Register Date | 10/26/2022           |
| Diagnosis Information                                                                                                 | <input type="text"/> |                   |                      |
| Details                                                                                                               | <input type="text"/> |                   |                      |
| <b>Issued Data</b>                                                                                                    |                      |                   |                      |
| *Issued by                                                                                                            | <input type="text"/> |                   |                      |
| *Date From                                                                                                            | 10/26/2022           |                   |                      |
| Location                                                                                                              | <input type="text"/> |                   |                      |
| <b>Monthly Salary Type</b>                                                                                            |                      |                   |                      |
| <input checked="" type="radio"/> Job Monthly Pay Rate <input type="radio"/> Job Rate Code <input type="radio"/> Other |                      |                   |                      |

Incidents need to be set up in the Incident Details BRA component to access incidents through the Injury Details BRA components and enter Brazilian reporting information on this page. Information entered on this page is used on the Work Risk report for Brazil.

## Injury Details

| Field or Control | Description                                      |
|------------------|--------------------------------------------------|
| Area Type        | Valid values are <i>Rural</i> and <i>Urban</i> . |



| <b>Field or Control</b> | <b>Description</b>                                                                                                                                                                       |
|-------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>INSS Type</b>        | Valid values are <i>Employee</i> , <i>Medical Doctor</i> , <i>Non-Employee</i> , and <i>Special Security</i> .                                                                           |
| <b>Worked Hours</b>     | Enter the number of hours this employee worked prior to the injury.                                                                                                                      |
| <b>CID Code</b>         | Enter the international disease code related to this injury. Valid values are defined in the CID Code BRA table.<br><br>This code is used in CAT reporting ( <i>BRCAT01</i> SQR report). |
| <b>Retired</b>          | Select if the employee is retired.                                                                                                                                                       |

## CAT Information

| <b>Field or Control</b>     | <b>Description</b>                                                                                                                                                                                                                                                                                                |
|-----------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>CAT ID and Date</b>      | Enter the work risk ID and date.<br><br>To add a new row to the <b>CAT Information</b> section, the (CAT) date entered must be later than all the rows that are available.<br>Note that when you delete a row from this section, the system only allows the row with the latest date to be deleted.               |
| <b>CAT Type</b>             | Enter the work risk type. Valid values are <i>Death Communication</i> , <i>Initial</i> , and <i>Reopened</i> .<br><br><b>Note:</b> For each incident row, the system accepts only one row for the <i>Death Communication</i> CAT type and one row for the <i>Initial</i> CAT type in the CAT Information section. |
| <b>CAT Partial</b>          | Select to use only part of the Details BRA page to record CAT information. When selected, the <b>Medical Treatment</b> section, <b>Diagnostic Information</b> and <b>Details</b> fields do not display.<br><br>The system generates a mapping error in eSocial if this option is selected.                        |
| <b>Certificate of Death</b> | Select if a death certificate has been issued.                                                                                                                                                                                                                                                                    |

| <b>Field or Control</b>                            | <b>Description</b>                                                                                                                                                                              |
|----------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>eSocial Accident Tp</b> (eSocial accident type) | Specify the accident type for the injury. This information is used in eSocial reporting.<br><br>Accident type eSocial codes are defined on the <a href="#">Accident Type eSocial BRA Page</a> . |
| <b>Death and Death Date</b>                        | Select if this injury resulted in a death and enter the date that the death occurred. You must enter a death date if the <i>Death Communication</i> CAT type is selected.                       |
| <b>CNES</b>                                        | Enter the code of the National Register of Health Facility (7 alphanumeric characters).                                                                                                         |
| <b>Absence Indicator</b>                           | Indicate if the worker was on leave of absence as a result of the work accident. This information is used in eSocial S-2210 reporting.                                                          |
| <b>CAT Register ID and CAT Register Date</b>       | Enter the work risk register ID and date related to this injury.                                                                                                                                |
| <b>Diagnosis Information and Details</b>           | Enter diagnosis information of the injury.<br><br>These fields appear if the <b>CAT Partial</b> option is deselected.                                                                           |

## Medical Treatment

Use this section to provide treatment information for the injury, such as the date and time of treatment, type of care, physician and medical facility providing the treatment. This section appears if the **CAT Partial** option is deselected, and a CAT type is specified. Complete this section for the eSocial S-2210 reporting.

| <b>Field or Control</b> | <b>Description</b>                                                        |
|-------------------------|---------------------------------------------------------------------------|
| <b>Date and Time</b>    | Enter the date and time when the employee received health care treatment. |

| <b>Field or Control</b>                                                    | <b>Description</b>                                                                                                                                                                                                                                                                                                                                                                                                         |
|----------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Type of Health Care</b>                                                 | <p>Select the type of health care that the employee received at the hospital or clinic. Valid values are:</p> <p><i>1st Treatment (Physician)</i></p> <p><i>Company Physician</i></p> <p><i>Emergency Care</i></p> <p><i>Family Physician</i></p> <p><i>Further Treatment (Hospital)</i></p> <p><i>Further Treatment (Physician)</i></p> <p><i>Hospital</i></p> <p><i>Ongoing Health Care</i></p> <p><i>Specialist</i></p> |
| <b>Physician ID</b>                                                        | <p>Select the name of the employee's physician. Once selected, the Organ Statutory, Register Number, Country and State field values of the physician are populated automatically on the page.</p> <p>Physicians are defined using the Physician BRA (HS_PHYSICIAN_BRA) component.</p> <p>See Also <a href="#">Defining Medical Services Information</a></p>                                                                |
| <b>Physician Name, Organ Statutory, Register Number, Country and State</b> | If the physician is not defined in the system, enter this physician information manually.                                                                                                                                                                                                                                                                                                                                  |
| <b>Medical Facility</b>                                                    | Select the medical facility to which the injured or ill employee was taken. Values come from the Medical Facilities table.                                                                                                                                                                                                                                                                                                 |
| <b>CID Code</b>                                                            | <p>Enter the international disease code related to this injury. Valid values are defined in the CID Code BRA table.</p> <p>This code is used in the eSocial S-2210 reporting.</p>                                                                                                                                                                                                                                          |
| <b>Days of Treatment</b>                                                   | Enter the number of days the injured employee received treatment.                                                                                                                                                                                                                                                                                                                                                          |
| <b>Absence Begin Date</b>                                                  | Enter the date that the employee begins to be absent from work due to the work accident.                                                                                                                                                                                                                                                                                                                                   |

| <b>Field or Control</b> | <b>Description</b>                                                                                             |
|-------------------------|----------------------------------------------------------------------------------------------------------------|
| <b>Absence End Date</b> | Enter the date that the employee's absence from work ends due to a medical discharge or death of the employee. |

## Issued Data

| <b>Field or Control</b>                   | <b>Description</b>                                                                                                                                                                                                                                                    |
|-------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Issued by, Date From, and Location</b> | Valid issued by values are <i>Authority Public</i> , <i>Doctor</i> , <i>Employer</i> , <i>Seg o Dependen</i> , and <i>Union</i> .                                                                                                                                     |
| <b>Initiative Issued</b>                  | Select the reason the injury report was initiated. This field appears if the <i>Employer</i> is selected in the <b>Issued by</b> field.<br><br>Values are <i>Court Order</i> , <i>Determined by Supervisory Org</i> , and <i>Employer Initiative</i> (default value). |

## Monthly Salary Type

| <b>Field or Control</b>                              | <b>Description</b>                                                                                                                                                                                                                                                       |
|------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Job Monthly Pay Rate, Job Rate Code, or Other</b> | Select the monthly salary type that applies:<br><br><b>Job Monthly Pay Rate</b><br><br><b>Job Rate Code:</b> Select if the monthly salary type should be a specific compensation rate code.<br><br><b>Other:</b> Select if the monthly salary type is none of the above. |
| <b>Comp Rate Code</b> (compensation rate code)       | Select the applicable compensation rate code from the Comp Rate Code table. This field appears if the <b>Job Rate Code</b> option is selected.                                                                                                                           |
| <b>Monthly Salary and Currency Code</b>              | Enter the monthly salary amount and its related currency. These fields appear if the <b>Other</b> option is selected.                                                                                                                                                    |

## Related Links

“S-2210 - Accident at Work Communication (CAT)” (PeopleSoft Global Payroll for Brazil)

## Entering Incident Data for Vehicles and Equipment

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

### Pages Used to Enter Incident Data for Vehicles and Equipment

| <b>Page Name</b>                                | <b>Definition Name</b> | <b>Usage</b>                                                                                                                                         |
|-------------------------------------------------|------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------|
| <u>Vehicles/Equipment Involved Page</u>         | HS_INC_VEHICLE         | Enter the specifics of incidents involving vehicles or equipment.                                                                                    |
| <u>Vehicles/Equipment Involv MEX Page</u>       | HS_INC_VEHICLE_MEX     | (MEX) Enter the specifics of incidents involving vehicles or equipment.                                                                              |
| Vehicles/Equipment Involved - Equipment Details | EQUIP_SUM_SEC          | View additional information about equipment.<br><br>The <b>Equipment Details</b> link is available only when the property type is <i>Equipment</i> . |
| Vehicles/Equipment Involved - Car Details       | CAR_DATA_SUM_SEC       | View additional information about vehicles.<br><br>The <b>Car Details</b> link is available only when the property type is <i>Vehicle</i> .          |

### Vehicles/Equipment Involved Page

Use the Vehicles/Equipment Involved page (HS\_INC\_VEHICLE) to enter the specifics of incidents involving vehicles or equipment.

Navigation:

**Workforce Monitoring > Health and Safety > Obtain Incident Information > Vehicles/Equipment Involved > Vehicles/Equipment Involved**

This example illustrates the fields and controls on the Vehicles/Equipment Involved page. You can find definitions for the fields and controls later on this page.

**Vehicles/Equipment Involved**

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

**Vehicle/Equipment Data** 1 of 1 [View All](#)

\*Property Code  [Q](#)

Type

Business Unit GBIBU [Q](#) Global Business Institute BU

Dept Charged  [Q](#)

\*Currency USD [Q](#)

Equipment Details [+](#) [-](#)

Car Details

**Estimated Damage Amount**

Vehicle/Equipment

Property

**Actual Damage Amount**

Vehicle/Equipment

Property

[USA](#)

☐ DMV Reported ☐ DOT Reported

**Involved People** 1 of 1 [View All](#)

| Empl ID                                  | Non-Empl ID                            | *Role                                                                      |
|------------------------------------------|----------------------------------------|----------------------------------------------------------------------------|
| 1 <input type="text"/> <a href="#">Q</a> | <input type="text"/> <a href="#">Q</a> | <input type="text"/> <a href="#">Q</a> <a href="#">+</a> <a href="#">-</a> |

| Field or Control                                           | Description                                                                                                                                                                                                                                                                                                                                                                    |
|------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Property Code</b>                                       | <p>Select a property code from the values that you classify as vehicles or heavy equipment in the Company Property table.</p> <p>For vehicles, the system makes the <b>Car Details</b> link available.<br/>For heavy equipment, the system makes the <b>Equipment Details</b> link available. Click the links for the associated pages.</p>                                    |
| <b>Business Unit and Dept Charged</b> (department charged) | <p>If you assign this company property to a business unit and department in the Company Property table, the business unit and department that is charged for the incident appears here. Otherwise, select the business unit, if needed. The values come from the Business Unit table. Select the department charged, if needed. The values come from the Department table.</p> |
| <b>Estimated Damage Amount</b>                             | <p>Enter an estimated damage amount for the vehicle or equipment and any other property that is damaged in the incident, if an estimate is provided.</p>                                                                                                                                                                                                                       |
| <b>Actual Damage Amount</b>                                | <p>Enter an actual damage amount for the vehicle or equipment and any other property that is damaged in the incident, when that information is known.</p>                                                                                                                                                                                                                      |

**(USA) USA**

| <b>Field or Control</b>                                               | <b>Description</b>                                                                                                                |
|-----------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------|
| <b>DMV Reported</b> (Department of Motor Vehicles reported)           | Select if the incident is reported to the state Department of Motor Vehicles.                                                     |
| <b>DOT Reported</b> (Department of Transportation reported)           | Select if the incident is reported to the federal Department of Transportation.                                                   |
| <b>Empl ID</b> (employee ID) and <b>Non-Empl ID</b> (non-employee ID) | Identify the employees or non-employees that are associated with the vehicle or heavy equipment that is involved in the incident. |
| <b>Role</b>                                                           | Indicate the role of each person that is involved in the accident.                                                                |

**Vehicles/Equipment Involv MEX Page**

(MEX) Use the Vehicles/Equipment Involv MEX page (Vehicles/Equipment Involved MEX) (HS\_INC\_VEHICLE\_MEX) to enter the specifics of incidents involving vehicles or equipment.

Navigation:

**Workforce Monitoring > Health and Safety > Obtain Incident Information > Vehicles/Equipment Involv MEX > Vehicles/Equipment Involv MEX**

This example illustrates the fields and controls on the Vehicles/Equipment Involvement MEX page. You can find definitions for the fields and controls later on this page.

### Vehicles/Equipment Involved MEX

Incident Number 10000160      Date 03/15/2018      Incident Type Vehicle/Equipment Accident

---

**Vehicle/Equipment Data**

☒ External

Tag/Serial Number

Comments

Business Unit GBIBU  Global Business Institute BU

Dept Charged

\*Currency Code USD

**Estimated Damage Amount**

Vehicle/Equipment

Property

**Actual Damage Amount**

Vehicle/Equipment

Property

**Involved People**

|   | Empl ID              | Non-Employee ID      | *Employee Role       |                                  |                                  |
|---|----------------------|----------------------|----------------------|----------------------------------|----------------------------------|
| 1 | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="button" value="+"/> | <input type="button" value="-"/> |

The layout of the Vehicles/Equipment Involv MEX page is mostly identical to the Vehicles/Equipment Involved Page, except that on the Vehicles/Equipment Involv MEX page, the USA section is not visible, and the availability of these fields:

| <i><b>Field or Control</b></i>               | <i><b>Description</b></i>                                                                                                                                                                                                                                                                                                                                                                            |
|----------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>External</b>                              | <p>Select if the vehicle or heavy equipment to be reported is not available in the system as company property.</p> <p>When selected, the system displays the <b>Tag/Serial Number</b> and <b>Comments</b> fields for you to enter free text about the property. It hides the <b>Property Code</b> and <b>Type</b> fields, as well as the <b>Equipment Details</b>, and <i>Car Details</i> links.</p> |
| <b>Tag/Serial Number</b> and <b>Comments</b> | Enter a tag or serial number to identify the property and any information to describe it (for example, if the property is a vehicle, enter the year and model).                                                                                                                                                                                                                                      |

## Tracking Consequent Actions of Incidents

This section discusses the methods that you can use to document consequent actions of incidents.



## Pages Used to Track Incident Consequent Actions

| <i><b>Page Name</b></i> | <i><b>Definition Name</b></i> | <i><b>Usage</b></i>                                                     |
|-------------------------|-------------------------------|-------------------------------------------------------------------------|
| <u>Corrective Page</u>  | HS_INC_ACTION_CRCT            | Enter corrective and preventive actions.                                |
| <u>Preventive Page</u>  | HS_INC_ACTION_PREV            | Enter preventive actions that are taken to prevent workplace incidents. |

## Methods of Documenting Consequent Actions

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

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

## Corrective Page

Use the Corrective page (HS\_INC\_ACTION\_CRCT) to enter corrective and preventive actions.

Navigation:

**Workforce Monitoring > Health and Safety > Obtain Incident Information > Corrective/Preventive Actions > Corrective**

This example illustrates the fields and controls on the Corrective page. You can find definitions for the fields and controls later on this page.

Corrective

Preventive

Incident Number

19240003

Date

05/18/2002

Incident Type

Vehicle/Equipment Accident

Causes

Q

|

◀

▶

1 of 1

◀

▶

View All

\*Hazard

Q

\*Cause

+

-

Consequent Actions

Q

|

◀

▶

1 of 1

◀

▶

View All

\*Action Sequence

1

+

-

Responsible ID

Q

Category

▼

\*Status

Recommended

▼

Action

📎

Completion Date

Estimated

📅

Actual

📅

🇩🇪 Germany

Corrective Actions

Q

| Field or Control       | Description                                                                                                                                                                     |
|------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Hazard</b>          | Select a code from the values that come from the Hazardous Materials/Conditions table. The value that is associated with the selected hazard appears in the <b>Cause</b> field. |
| <b>Action Sequence</b> | The system automatically assigns the action sequence in numerical order for each data row that you insert.                                                                      |
| <b>Responsible ID</b>  | Select the ID of the employee who is responsible for following through on the action.                                                                                           |
| <b>Category</b>        | Select a category for the action.                                                                                                                                               |
| <b>Status</b>          | Enter the status of the action.                                                                                                                                                 |
| <b>Action</b>          | For each action sequence, you can enter a description.                                                                                                                          |

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| <b>Field or Control</b>     | <b>Description</b>                                                                                     |
|-----------------------------|--------------------------------------------------------------------------------------------------------|
| <b>Estimated and Actual</b> | When you know them, enter the estimated, actual, or both completion dates for carrying out the action. |

---

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

---

### **(DEU) Germany**

| <b>Field or Control</b>   | <b>Description</b>                                                                                                     |
|---------------------------|------------------------------------------------------------------------------------------------------------------------|
| <b>Corrective Actions</b> | For each action, select the appropriate code from the values that are established in the GER Corrective Actions table. |

## **Preventive Page**

Use the Preventive page (HS\_INC\_ACTION\_PREV) to enter preventive actions that are taken to prevent workplace incidents.

Navigation:

**Workforce Monitoring > Health and Safety > Obtain Incident Information > Corrective/Preventive Actions > Preventive**

This example illustrates the fields and controls on the Preventive page. You can find definitions for the fields and controls later on this page.

CorrectivePreventive

Incident Number19240003Date05/18/2002Incident TypeVehicle/Equipment Accident

Causes

Q

1 of 1

View All

\*Hazard

Q

\*Cause

+ -

Preventative Actions

Q

1 of 1

View All

\*Action Sequence

1

+ -

Responsible ID

Q

Category

\*Status

Recommended

Action

Completion Date

Estimated

Actual

Canada

Preventative Action

Q

'Other' Description

Germany

Preventative Action

Q

Causes

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

(CAN) Canada

| Field or Control    | Description                                                                                                     |
|---------------------|-----------------------------------------------------------------------------------------------------------------|
| Preventative Action | For each action, select the appropriate code from the values that come from the CAN Preventative Actions table. |

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| <b>Field or Control</b>    | <b>Description</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|----------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>'Other' Description</b> | <p>This field is available only to users in British Columbia when they enter the preventative action code <i>00996</i>. Users in British Columbia may enter descriptions of nonstandard preventative actions, which are then used in reports to the British Columbia Workers Compensation Board (BC WCB).</p> <p>Users in British Columbia must first ensure that the preventative action codes that are entered in the CAN Preventative Actions table are the approved codes that are used by the BC WCB, including the code <i>00996 - Other</i>.</p> <p>If you are a user in British Columbia, and if the approved codes are entered into that table and the incident that you are currently working with has the Regulatory Region CANBC applied to it, then when you select a Preventative Action code of <i>00996 - Other</i> in the Preventative Action field on this page, the 'Other' Description field is available for data entry. Enter a description of the nonstandard preventative action.</p> |

---

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

---

### (DEU) Germany

| <b>Field or Control</b>    | <b>Description</b>                                                                                                 |
|----------------------------|--------------------------------------------------------------------------------------------------------------------|
| <b>Preventative Action</b> | For each action, select the appropriate action from the values which come from the GER Preventative Actions Table. |

---

## Tracking Incident, Injury, and Illness Data by Individual

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

### Pages Used to Summarize Employee Injuries

| <b>Page Name</b>                                    | <b>Definition Name</b> | <b>Usage</b>                                                                                   |
|-----------------------------------------------------|------------------------|------------------------------------------------------------------------------------------------|
| <a href="#">Review Employee Injury Summary Page</a> | INJURY_SUMMARY         | View a summary of all the injuries that an employee has experienced and related incident data. |

| <b>Page Name</b>          | <b>Definition Name</b> | <b>Usage</b>                                                                                                                                                                                     |
|---------------------------|------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Review Injury Summary BRA | INJURY_SUM_BRA         | <p>(BRA) View a summary of all the injuries that an employee has experienced and related incident data for Brazil.</p> <p>This page is identical to the Review Employee Injury Summary page.</p> |

## Related Links

[Injury Details - Details Page](#)

## Prerequisites

Before you can access injury and illness data by individual, you must first create incident data and associate individuals with the incident by using the Incident Details (HS\_INCIDENT) or Incident Details BRA (HS\_INCIDENT\_BRA) components.

## Review Employee Injury Summary Page

Use the Review Employee Injury Summary page (INJURY\_SUMMARY) to view a summary of all the injuries that an employee has experienced and related incident data.

Navigation:

**Workforce Monitoring > Health and Safety > Obtain Incident Information > Review Employee Injury Summary > Review Employee Injury Summary**

This example illustrates the fields and controls on the Review Employee Injury Summary page. You can find definitions for the fields and controls later on this page.

**Review Employee Injury Summary**

Rajkumar Goenka

Employee

Empl ID KP0003

Empl Record 0

Business Unit India Business Unit

Department Human Resources

Job Code Trainee - Management

Location M G Road, Branch

Last Start Date 03/01/2002

Employee Status Active

**Employee Injury Summary**

1-1 of 1

View All

| Incident Nbr | Incident Date | Incident Type              | Primary Outcome | Injury Treatment | Show Details                 | Reportable Case |
|--------------|---------------|----------------------------|-----------------|------------------|------------------------------|-----------------|
| 1 19240003   | 05/18/2002    | Vehicle/Equipment Accident | Injury          | Hospitalized     | <a href="#">Show Details</a> | Y               |

| <b>Field or Control</b> | <b>Description</b>                                                                                                                                                                                                                                                                                                   |
|-------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Show Details</b>     | <p>Click to access the Injury Details - Details page for a selected incident. Review and update injury or illness information and the pages that are in the Injury Details component. This link is helpful when you do not have the incident number at hand.</p> <p>Save the changes before you close the pages.</p> |

## (GBR) Collecting RIDDOR Data for UK reports

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

### Page Used to Run the Collect RIDDOR Data Process

| <i>Page Name</i>    | <i>Definition Name</i> | <i>Usage</i>                                             |
|---------------------|------------------------|----------------------------------------------------------|
| Collect RIDDOR Data | RUNCTL_OHS_UK          | Collect RIDDOR data for GBR Health and Safety reporting. |

#### Related Links

“Monitor Health and Safety Reports” (Application Fundamentals)

### Understanding the Collect RIDDOR Data Process

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

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

## (MEX) Defining Mixed Committees for Mexico

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

### Page Used to Define Mixed Committees

| <i>Page Name</i>                | <i>Definition Name</i> | <i>Usage</i>                                                                                        |
|---------------------------------|------------------------|-----------------------------------------------------------------------------------------------------|
| <u>Mixed Committee MEX Page</u> | MIX_COM_TBL_MEX        | Define details for the mixed committee, including class, representatives, location, and objectives. |

### Understanding Mixed Committees for Health and Safety

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

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

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

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

After you define the details for a health and safety mixed committee, there is an additional step. If a safety incident occurs on the job, record it on the Incident Details page.

## Defining Training Legal Requirements

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

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

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

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

## Mixed Committee MEX Page

Use the Mixed Committee MEX page (MIX\_COM\_TBL\_MEX) to define details for the mixed committee, including class, representatives, location, and objectives.

Navigation:

**Workforce Monitoring > Health and Safety > Collect Health/Safety Data > Mixed Committee MEX > Mixed Committee MEX**



This example illustrates the fields and controls on the Mixed Committee MEX page. You can find definitions for the fields and controls later on this page.

Mixed Committee MEX

Mixed CommitteeTrabajo

Committee Detail

Q

|<<<1 of 1>>>|

View All

\*Effective Date05/26/2020

\*StatusActive

+ -

\*Description

Short Description

\*Year

\*Constitution Date05/26/2020

\*ClassHealth & Safety

Representative

Q

|<<<1 of 1>>>|

View All

\*Empl ID

+ -

\*Status Date05/26/2020

\*StatusActive

\*TypeEmployee

Location

Q

|<<<1 of 1>>>|

View All

\*Business Unit

+ -

\*Location Code

Objective Detail

Q

|<<<1 of 1>>>|

View All

\*Objective Year

Sequence0

+ -

\*TypeObjective

Objective

Description

Committee Detail

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

| Field or Control  | Description                                                                             |
|-------------------|-----------------------------------------------------------------------------------------|
| Year              | Enter the year for which the mixed committee is effective.                              |
| Constitution Date | Enter the date when the mixed committee is formed.                                      |
| Class             | Select the committee class. Values are <i>Health &amp; Safety</i> and <i>Training</i> . |

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## Representative

Define details for mixed committee representatives.

| <b>Field or Control</b> | <b>Description</b>                                                                    |
|-------------------------|---------------------------------------------------------------------------------------|
| <b>Empl ID</b>          | Select the employee ID of the representative for the mixed committee.                 |
| <b>Type</b>             | Identify the type of representative. Values are <i>Employee</i> and <i>Employer</i> . |

## Location

| <b>Field or Control</b> | <b>Description</b>                                            |
|-------------------------|---------------------------------------------------------------|
| <b>Business Unit</b>    | Select the business unit that the mixed committee serves.     |
| <b>Location Code</b>    | Identify the location where the mixed committee is available. |

## Objective Detail

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

| <b>Field or Control</b> | <b>Description</b>                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|-------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Objective Year</b>   | Enter the year in which the mixed committee's objectives are effective.                                                                                                                                                                                                                                                                                                                                                                                |
| <b>Sequence</b>         | If you have more than one objective, you can identify each objective by assigning it a sequence number.                                                                                                                                                                                                                                                                                                                                                |
| <b>Type</b>             | <p>Select the objective type. Values are:</p> <ul style="list-style-type: none"> <li>• <i>Function</i>: An activity that a mixed committee needs to do.</li> <li>• <i>Mechanism</i>: The way to achieve the functions or goals of a mixed committee.</li> <li>• <i>Objective</i>: The goals of the period in which the committee is valid.</li> <li>• <i>Other</i>: Any other information that you need to enter about the mixed committee.</li> </ul> |

| <b><i>Field or Control</i></b> | <b><i>Description</i></b>                                                            |
|--------------------------------|--------------------------------------------------------------------------------------|
| <b>Objective</b>               | Enter the objective of the mixed committee.                                          |
| <b>Description</b>             | Enter a description for the function, mechanism, objective, or other objective type. |



## Chapter 6

# Processing Rehabilitation, Claims, and Examination Data

## Managing Claims

This section provides an overview of claims management and reports.

### Pages Used to Manage Claims

| <b><i>Page Name</i></b>                    | <b><i>Definition Name</i></b> | <b><i>Usage</i></b>                                                                                                       |
|--------------------------------------------|-------------------------------|---------------------------------------------------------------------------------------------------------------------------|
| <a href="#">Claim Details Page</a>         | HS_CLAIM_MGMT1                | Open claims.                                                                                                              |
| <a href="#">Appeal Details Page</a>        | HS_CLAIM_APPL_SEC             | Enter details about the claim appeal.                                                                                     |
| <a href="#">Claim Charges Page</a>         | HS_CLAIM_MGMT2                | Track charges related to injury claims, including one-time medical treatments and lengthy, multiple claim-incurred costs. |
| <a href="#">Payments and Deposits Page</a> | HS_CST_IND_SEC                | (IND) Enter specific information about claim payments.                                                                    |
| <a href="#">Claim Provider Page</a>        | HS_CLAIM_MGMT3                | Enter provider reference data, the claim assessment date, and its disposition.                                            |
| Contact's Work Address                     | HS_CM3CAN_SEC                 | (CAN) Enter additional address details for the claim contact in Canadian claims.                                          |

## Understanding Claims Management

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

You might need to create claims before you create incidents. For example, you might not learn about an incident until someone files a claim against the organization. You create the claim first. Later, as you learn more about the incident and enter incident details in HR, you can link the claim and the incident in the system by entering the incident number on the Claims Management pages.

**Note:** For users in British Columbia who report incidents to the British Columbia Workers' Compensation Board (BC WCB) electronically, claims information is required on the Claims Management pages for all incident outcome types except *Dangerous Occurrence*.

## Claims Reports

You can generate these claims reports:

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

## Related Links

“Monitor Health and Safety Reports” (Application Fundamentals)

## Claim Details Page

Use the Claim Details page (HS\_CLAIM\_MGMT1) to open claims.

Navigation:

**Workforce Monitoring > Health and Safety > Obtain Incident Information > Open Claim > Claim Details**

This example illustrates the fields and controls on the Claim Details page (1 of 2). You can find definitions for the fields and controls later on this page.

| Claim Details                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | Claim Charges | Claim Provider                        |                 |                             |               |            |                             |      |          |                                       |  |  |          |        |                  |  |  |          |    |                  |  |  |         |     |        |  |  |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|---------------------------------------|-----------------|-----------------------------|---------------|------------|-----------------------------|------|----------|---------------------------------------|--|--|----------|--------|------------------|--|--|----------|----|------------------|--|--|---------|-----|--------|--|--|
| <p>Claim Number 00094000</p> <p>*Date Opened 06/24/2000 </p> <p>Date Closed </p>                                                                                                                                                                                                                                                                                                                                                                                                                                                           |               |                                       |                 |                             |               |            |                             |      |          |                                       |  |  |          |        |                  |  |  |          |    |                  |  |  |         |     |        |  |  |
| <p><b>Claim Status</b></p> <p> <input checked="" type="radio"/> Pending           <input type="radio"/> Approved           <input type="radio"/> Denied           <input type="radio"/> Withdrawn         </p>                                                                                                                                                                                                                                                                                                                             |               |                                       |                 |                             |               |            |                             |      |          |                                       |  |  |          |        |                  |  |  |          |    |                  |  |  |         |     |        |  |  |
| <p><b>Person Filing</b></p> <p>Empl ID KC0005  Catherine Moore</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |               |                                       |                 |                             |               |            |                             |      |          |                                       |  |  |          |        |                  |  |  |          |    |                  |  |  |         |     |        |  |  |
| <p><b>Incident Data</b></p> <table> <tr> <td>Incident Number</td> <td>00000011 </td> <td>Incident Date</td> <td>06/15/2000</td> <td><a href="#">Appeal Data</a></td> </tr> <tr> <td>Type</td> <td>Incident</td> <td><input type="checkbox"/> Investigated</td> <td colspan="2"></td> </tr> <tr> <td>Location</td> <td>KCBC00</td> <td colspan="3">Vancouver Branch</td> </tr> <tr> <td>Province</td> <td>BC</td> <td colspan="3">British Columbia</td> </tr> <tr> <td>Country</td> <td>CAN</td> <td colspan="3">Canada</td> </tr> </table> |               |                                       | Incident Number | 00000011                    | Incident Date | 06/15/2000 | <a href="#">Appeal Data</a> | Type | Incident | <input type="checkbox"/> Investigated |  |  | Location | KCBC00 | Vancouver Branch |  |  | Province | BC | British Columbia |  |  | Country | CAN | Canada |  |  |
| Incident Number                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | 00000011      | Incident Date                         | 06/15/2000      | <a href="#">Appeal Data</a> |               |            |                             |      |          |                                       |  |  |          |        |                  |  |  |          |    |                  |  |  |         |     |        |  |  |
| Type                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | Incident      | <input type="checkbox"/> Investigated |                 |                             |               |            |                             |      |          |                                       |  |  |          |        |                  |  |  |          |    |                  |  |  |         |     |        |  |  |
| Location                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | KCBC00        | Vancouver Branch                      |                 |                             |               |            |                             |      |          |                                       |  |  |          |        |                  |  |  |          |    |                  |  |  |         |     |        |  |  |
| Province                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | BC            | British Columbia                      |                 |                             |               |            |                             |      |          |                                       |  |  |          |        |                  |  |  |          |    |                  |  |  |         |     |        |  |  |
| Country                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | CAN           | Canada                                |                 |                             |               |            |                             |      |          |                                       |  |  |          |        |                  |  |  |          |    |                  |  |  |         |     |        |  |  |

This example illustrates the fields and controls on the Claim Details page (2 of 2). You can find definitions for the fields and controls later on this page.

Canada

WCB Claim Number

France

Claimant 
Recipient

USA

Case Number
Date Filed

India

**Medical Officer Certification**

☐ Certified
Date of Certification

**Dependent Claims**

Dependent ID 
Relationship

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

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

| <b>Field or Control</b> | <b>Description</b>                                                                                          |
|-------------------------|-------------------------------------------------------------------------------------------------------------|
| <b>Claim Status</b>     | Select whether the claim status is <i>Pending</i> , <i>Approved</i> , <i>Denied</i> , or <i>Withdrawn</i> . |
| <b>Date Opened</b>      | The date the claim is opened appears. By default, this is the current date, which you can change if needed. |
| <b>Date Closed</b>      | Enter the date that the claim is resolved.                                                                  |
| <b>Person Filing</b>    | Select either an <b>Empl ID</b> or a <b>Non-Empl ID</b> for the person filing.                              |

## Incident Data

| <i>Field or Control</i> | <i>Description</i>                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|-------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Incident Number</b>  | <p>Select an incident number to associate with the claim. The system prompts you only with incidents that are associated with this individual. When you enter the incident number, the <b>incident date, type, location, state and country appear on the page.</b></p> <p>You do not have to enter an incident number when you first create a claim. However, you must add an incident and save the information before you can change the <b>Claim Status</b> to <b>Approved.</b></p> |
| <b>Appeal Data</b>      | If the claim is appealed, click this link to access the Appeal Details page (HS_CLAIM_APPL_SEC).                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>Investigated</b>     | Select if the claim is investigated.                                                                                                                                                                                                                                                                                                                                                                                                                                                  |

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

## (CAN) Canada

| <i>Field or Control</i>   | <i>Description</i>                                               |
|---------------------------|------------------------------------------------------------------|
| <b>(WCB) Claim Number</b> | Enter the Workers' Compensation Board (WCB) <b>claim number.</b> |

## (FRA) France

| <i>Field or Control</i> | <i>Description</i>         |
|-------------------------|----------------------------|
| <b>Claimant</b>         | Select the claimant type.  |
| <b>Recipient</b>        | Select the recipient type. |



**(USA) USA**

| <b>Field or Control</b> | <b>Description</b>                                                                                                                                                                                                                  |
|-------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Case Number</b>      | If the claim concerns an incident to which you previously assigned an OSHA Case Number and Date Filed on the Official Report Details - USA page, then the <b>Case Number</b> and <b>Date Filed</b> fields appear in read-only mode. |

**(IND) India**

| <b>Field or Control</b>      | <b>Description</b>                                                                                                |
|------------------------------|-------------------------------------------------------------------------------------------------------------------|
| <b>Certified</b>             | Select if a medical officer has certified the claim.                                                              |
| <b>Date of Certification</b> | Enter the date of certification.                                                                                  |
| <b>Dependent ID</b>          | For dependent claims, select the Dependent ID. Once selected, the system populates the <b>Relationship</b> field. |

**Appeal Details Page**

Use the Appeal Details page (HS\_CLAIM\_APPL\_SEC) to enter details about the claim appeal.

Navigation:

Click the **Appeal Data** link on the Claim Details page.

This example illustrates the fields and controls on the Appeal Details page. You can find definitions for the fields and controls later on this page.

| <i>Field or Control</i>     | <i>Description</i>                                                 |
|-----------------------------|--------------------------------------------------------------------|
| <b>Date of Appeal</b>       | Enter the date on which the appeal is filed.                       |
| <b>Date Claim Re-Opened</b> | Enter the date on which the claim is re-opened.                    |
| <b>Appealed By</b>          | Select from the available values to indicate who filed the appeal. |

## Claim Charges Page

Use the Claim Charges page (HS\_CLAIM\_MGMT2) to track charges related to injury claims, including one-time medical treatments and lengthy, multiple claim-incurred costs.

Navigation:

**Workforce Monitoring > Health and Safety > Obtain Incident Information > Open Claim > Claim Charges**

This example illustrates the fields and controls on the Claim Charges page. You can find definitions for the fields and controls later on this page.

Claim Details

Claim Charges

Claim Provider

Claim Number00094000

Incident Number00000011

Created06/24/2000

Empl IDKC0005

Catherine Moore

Claim StatusPending

Incident Date06/15/2000

Close Date

Claim Charges

Q

1 of 1

View All

Total Claim275.45

To CurrencyUSD

+ -

\*Type of ChargeMedical Costs

Claim Details

Q

1-1 of 1

View All

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

Total Type275.45

To CurrencyUSD

India

Claim Payment Details

Claim Charges

| Field or Control | Description                                                                                                                                                                                                                                                                                                                                                                                        |
|------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Total Claim      | The total charges for the claim (all charges for all types) in the currency that is specified for a user ID in the Operator Preferences table. If there is no <b>To Currency</b> for the User ID in the Operator Preferences Table, then the system uses the base currency that you specified in the Installation Table. (This is also true for the <b>Currency</b> and <b>Total Type</b> fields.) |
| Type of Charge   | Select one: <i>Medical Costs</i> , <i>Other Costs</i> , or <i>Wage Loss</i> .<br><br>To add more charge types, insert additional data rows.                                                                                                                                                                                                                                                        |

Claim Details

| Field or Control | Description                          |
|------------------|--------------------------------------|
| Charge Date      | Enter the charge date for the claim. |

| <b>Field or Control</b> | <b>Description</b>                                                                                                 |
|-------------------------|--------------------------------------------------------------------------------------------------------------------|
| <b>Charge Amount</b>    | Enter a charge amount. Enter multiple charges for each type by adding new data rows.                               |
| <b>Total Type</b>       | The total charges for this claim type in the currency specified for the user ID in the Operator Preferences table. |

## **(IND) India**

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

## **Payments and Deposits Page**

Use the Payments and Deposits page (HS\_CST\_IND\_SEC) (IND) to enter specific information about claim payments.

Navigation:

Click the **Claim Payment Details** link in the India section of the Claim Charges page.

This example illustrates the fields and controls on the Payments and Deposits page. You can find definitions for the fields and controls later on this page.

Payments and Deposits

[Help](#)

Payment Type

1 of 1

View All

\* Payment Type

+

-

Payment Details

1 of 1

View All

\*Payment Date

05/27/2020

\*Seq Nbr

1

+

-

\*Amount

Recipient Type

Employee

Non-Employee

Dependent

Employee ID

Non-Employee ID

Dependent/Beneficiary ID

Relationship

Comment

OK

Cancel

| Field or Control | Description                                                                                                                          |
|------------------|--------------------------------------------------------------------------------------------------------------------------------------|
| Payment Type     | Select if the payment type is <i>Advance Payment</i> , <i>Claim Deposit</i> , <i>Claim Payment</i> , or <i>Provisional Payment</i> . |
| Payment Date     | Enter the payment date.                                                                                                              |
| Amount           | Enter the payment amount.                                                                                                            |

| <b>Field or Control</b> | <b>Description</b>                                                                                                                                                                                                                                     |
|-------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Recipient Type</b>   | Select if the recipient of the payment is an <i>Employee</i> , <i>Non-Employee</i> , or <i>Dependent</i> . Once selected, select the ID of the employee, non-employee, or dependent. If you select <i>Dependent</i> , the <b>relationship</b> appears. |
| <b>Comment</b>          | Enter an optional comment about the payment.                                                                                                                                                                                                           |

## Claim Provider Page

Use the Claim Provider page (HS\_CLAIM\_MGMT3) to enter provider reference data, the claim assessment date, and its disposition.

Navigation:

**Workforce Monitoring > Health and Safety > Obtain Incident Information > Open Claim > Claim Provider**

This example illustrates the fields and controls on the Claim Provider page. You can find definitions for the fields and controls later on this page.

| Claim Details                                                         | Claim Charges         | Claim Provider                |
|-----------------------------------------------------------------------|-----------------------|-------------------------------|
| Claim Number                                                          | 00094000              | Claim Status                  |
| Incident Number                                                       | 00000011              | Incident Date                 |
| Created                                                               | 06/24/2000            | Close Date                    |
| Empl ID                                                               | KC0005                | Catherine Moore               |
| Contact ID                                                            | KC0009                | Stephanie A Mills             |
| Provider Claim Nbr                                                    | 22346                 | Provider Name                 |
| Claims Manager                                                        | Check, Sam            |                               |
| Phone                                                                 | 604 555 9384          |                               |
| Assessment Date                                                       | 06/15/2000            | Disposition                   |
| Comment                                                               | Employee has bad back | Return with work restrictions |
| <div> <div>Canada</div> <div>Contact Address</div> </div>             |                       |                               |
| <div> <div>India</div> <div>Claim Filed Date</div> </div>             |                       |                               |
| <div> <div>Claim Received Date</div> <div>Claimed Amount</div> </div> |                       |                               |
| <div> <div>Unapproved Amount</div> <div>Comment</div> </div>          |                       |                               |

| <b>Field or Control</b>                           | <b>Description</b>                                                                                                                                               |
|---------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Contact ID</b>                                 | Select a <b>Contact ID</b> (Employee ID Number), if one exists within an organization. Available values come from personal data.                                 |
| <b>Provider Claim Nbr</b> (provider claim number) | Enter this, if you know it.<br><br>Typical types of providers are government agencies, such as the Workers' Compensation Board of Canada or insurance companies. |
| <b>Provider Name</b>                              | Enter the provider name.                                                                                                                                         |
| <b>Claims Manager</b>                             | Enter the name of the claims manager.                                                                                                                            |
| <b>Assessment Date</b>                            | Enter an assessment date.                                                                                                                                        |
| <b>Disposition</b>                                | Select the claim disposition from the available values in the list of available options.                                                                         |

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

### (IND) India

| <b>Field or Control</b>    | <b>Description</b>                                            |
|----------------------------|---------------------------------------------------------------|
| <b>Claim Filed Date</b>    | Enter the date the claim is filed.                            |
| <b>Claimed Amount</b>      | Enter the amount that is claimed.                             |
| <b>Claim Received Date</b> | Enter the date the claim is received by the provider.         |
| <b>Received Amount</b>     | Enter the date that the amount is received.                   |
| <b>Unapproved Amount</b>   | If the amount is an unapproved amount, enter the amount here. |
| <b>Comment</b>             | Enter an optional comment.                                    |

## Tracking Rehabilitation Plans

This section discusses how to track rehabilitation plans.

You develop rehabilitation plans when an employee or a non-employee is injured, and an injury claim is filed. The Create Employee Rehab Plan component enables you to track rehabilitation plans only for employees associated with an injury incident. The Create Non-Employee Rehab Plan component allows you to track rehabilitation plans only for non-employees associated with an injury incident. Rehabilitation plan information is helpful for government reporting and claims management.

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

### Pages Used to Track Rehabilitation Plans

| <i><b>Page Name</b></i>                    | <i><b>Definition Name</b></i> | <i><b>Usage</b></i>                                                                                                    |
|--------------------------------------------|-------------------------------|------------------------------------------------------------------------------------------------------------------------|
| <u>Claims Page</u>                         | HS_INJ_REHAB1                 | Associate an incident and essential claims data to rehabilitation plan details for either an employee or non-employee. |
| <u>Restrictions Page</u>                   | HS_INJ_REHAB2                 | Monitor an employee or non-employee's work restrictions and modified duties included in the rehabilitation plan.       |
| <u>Actions Page</u>                        | HS_INJ_REHAB3                 | Track the details of actions taken in the rehabilitation plan.                                                         |
| <u>Employee Work Restriction Smry Page</u> | HR_WORK_RESTR_SUM             | View the list of valid and current work restrictions by employee.                                                      |

### Claims Page

Use the Claims page (HS\_INJ\_REHAB1) to associate an incident and essential claims data to rehabilitation plan details for either an employee or non-employee.

Navigation:

- **Workforce Monitoring > Health and Safety > Obtain Incident Information > Create Employee Rehab Plan > Claims**
- **Workforce Monitoring > Health and Safety > Obtain Incident Information > Create Non-Employee Rehab Plan > Claims**



This example illustrates the fields and controls on the Claims page. You can find definitions for the fields and controls later on this page.

Claims

Restrictions

Actions

Empl ID

KC0005

Catherine Moore

Empl Record

0

Incident Number

00000011

Incident Type

Incident

Incident Date

06/15/2000

Last Work Date Before Injury

Regulatory Region

CANBC

Return Date

Claims Filed

1 of 1

View All

Claim Number

00094000

Open Date

06/24/2000

\*Claim Status

Pending

Close Date

Provider Claim Nbr

22346

Pacific Blue Cross

Assessment Date

06/15/2000

Disposition

Return with work restrictions

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

| Field or Control             | Description                                                          |
|------------------------------|----------------------------------------------------------------------|
| Last Work Date Before Injury | Enter the date for the last day the person worked before the injury. |
| Return Date                  | Enter the date when the person returned to work.                     |

Claims Filed

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

| Field or Control | Description                                |
|------------------|--------------------------------------------|
| Claim Status     | Select from the list of available options. |
| Close Date       | Enter the claim close date.                |

| <b>Field or Control</b>                           | <b>Description</b>                         |
|---------------------------------------------------|--------------------------------------------|
| <b>Provider Claim Nbr</b> (provider claim number) | Enter the provider claim number.           |
| <b>Assessment Date</b>                            | Enter the assessment date.                 |
| <b>Disposition</b>                                | Select from the list of available options. |

## Restrictions Page

Use the Restrictions page (HS\_INJ\_REHAB2) to monitor an employee or non-employee's work restrictions and modified duties included in the rehabilitation plan.

Navigation:

- **Workforce Monitoring > Health and Safety > Obtain Incident Information > Create Employee Rehab Plan > Restrictions**
- **Workforce Monitoring > Health and Safety > Obtain Incident Information > Create Non-Employee Rehab Plan > Restrictions**

This example illustrates the fields and controls on the Restrictions page. You can find definitions for the fields and controls later on this page.

|                                                                                                                                                                                                                                                                                       |                                     |                         |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------|-------------------------|
| <a href="#">Claims</a>                                                                                                                                                                                                                                                                | <b><a href="#">Restrictions</a></b> | <a href="#">Actions</a> |
| <div> <div>Empl ID</div> <div>KC0005</div> <div>Catherine Moore</div> </div> <div> <div>Empl Record</div> <div>0</div> <div>Incident Type</div> <div>Incident</div> </div> <div> <div>Incident Number</div> <div>00000011</div> <div>Incident Date</div> <div>06/15/2000</div> </div> |                                     |                         |
| <div> <div>Work Restrictions</div> <div> <input type="text"/> <div>From</div> <div>To</div> <div>+</div> <div>-</div> </div> </div>                                                                                                                                                   |                                     |                         |
| <div> <div>Work Modifications</div> <div> <input type="text"/> <div>From</div> <div>To</div> <div>+</div> <div>-</div> </div> </div>                                                                                                                                                  |                                     |                         |

| <b>Field or Control</b>  | <b>Description</b>                                                                                                                                                                       |
|--------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Work Restrictions</b> | Select a code for any work restrictions that the person has as a result of the injury or illness. Create these codes using the Codes and Effective Dates - Work Restrictions Table page. |

| <b>Field or Control</b>   | <b>Description</b>                                                                                                                             |
|---------------------------|------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Work Modifications</b> | Select a code for any work modifications the person has as a result of the injury or illness. Create these codes using the Modified Work page. |
| <b>From and To</b>        | Enter the dates for the period that each modified work duty must apply.                                                                        |

## Actions Page

Use the Actions page (HS\_INJ\_REHAB3) to track the details of actions taken in the rehabilitation plan.

Navigation:

- **Workforce Monitoring > Health and Safety > Obtain Incident Information > Create Employee Rehab Plan > Actions**
- **Workforce Monitoring > Health and Safety > Obtain Incident Information > Create Non-Employee Rehab Plan > Actions**

This example illustrates the fields and controls on the Actions page. You can find definitions for the fields and controls later on this page.

Claims
Restrictions
**Actions**

Empl ID KC0005
Empl Record 0
Incident Date 06/15/2000

Catherine Moore
Incident Number 00000011
Incident Type Incident

Rehabilitation Plan

1 of 1
View All

\*Action Sequence 1
Type

+

-

Responsible ID
Physician
Provider Description
Diagnosis

\*Action Status Recommended
Estimated Completion Date
Actual Completion Date

Corrective Action

| <b>Field or Control</b> | <b>Description</b>                                                           |
|-------------------------|------------------------------------------------------------------------------|
| <b>Action Sequence</b>  | The system assigns each data row with an action sequence in numerical order. |

| <b>Field or Control</b>          | <b>Description</b>                                                                                                                                                                                             |
|----------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Type</b>                      | Select an action type from the list of available options.                                                                                                                                                      |
| <b>Responsible ID</b>            | If a person within the organization is coordinating the rehabilitation plan, enter or select a responsible ID (employee ID number). The available values come from personal data.                              |
| <b>Physician</b>                 | Select an option from the list of available options. Values come from the Physicians table. Or, if you choose not to enter physicians in the Physicians table, enter the physician's name into the name field. |
| <b>Provider Description</b>      | Enter a description of the provider.                                                                                                                                                                           |
| <b>Diagnosis</b>                 | Select the type of diagnosis in this action. Create these values using the Diagnosis Table page.                                                                                                               |
| <b>Action Status</b>             | Change the action status if you are also changing the actual completion date.                                                                                                                                  |
| <b>Estimated Completion Date</b> | Enter the estimated completion date of the action.                                                                                                                                                             |
| <b>Actual Completion Date</b>    | When the action is complete, enter the actual completion date.                                                                                                                                                 |

## Employee Work Restriction Smry Page

Use the Employee Work Restriction Smry (employee work restriction summary) page (HR\_WORK\_RESTR\_SUM) to view the list of valid and current work restrictions by employee.

Navigation:

**Workforce Monitoring > Health and Safety > Employee Work Restriction Data > Employee Work Restriction Smry**

This example illustrates the fields and controls on the Employee Work Restriction Smry page. You can find definitions for the fields and controls later on this page.

**Employee Work Restriction Smry**

As of Date 05/27/2020

**Work Restrictions**

☐ ☐

1-1 of 1

|                          | Empl ID | Name | Work Restriction Code | Description | Restriction To Date | Incident Number | Incident Date | DETAIL |   |   |
|--------------------------|---------|------|-----------------------|-------------|---------------------|-----------------|---------------|--------|---|---|
| <input type="checkbox"/> | 1       |      |                       |             |                     |                 |               | DETAIL | + | - |

## Tracking Employee Medical Exam Results

This section includes common elements used in tracking employee medical exam results.

An organization can require employees to have medical examinations for a number of different reasons.

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

Track this information for employees only.

### Pages Used to Track Medical Exam Results

| <b><i>Page Name</i></b>                                              | <b><i>Definition Name</i></b> | <b><i>Usage</i></b>                                                                 |
|----------------------------------------------------------------------|-------------------------------|-------------------------------------------------------------------------------------|
| <u>Physical Exam Address/Phone Page</u>                              | HS_EXAM_PHYSICAL1             | Maintain basic appointment and physician contact information for physical exams.    |
| <u>Physical Exam - Exam Details Page</u>                             | HS_EXAM_PHYSICAL2             | Maintain physical exam results.                                                     |
| Audio Exam Address/Phone Page                                        | HS_EXAM_AUDIO1                | Maintain basic appointment and physician contact information for audio exams.       |
| <u>Audiometric Exam - Exam Details Page</u>                          | HS_EXAM_AUDIO2                | Maintain audiometric exam details.                                                  |
| Eye Exam Address/Phone Page                                          | HS_EXAM_EYE1                  | Maintain basic appointment and physician contact information for eye exams.         |
| <u>Eye Exam - Exam Details Page</u>                                  | HS_EXAM_EYE2                  | Maintain exam results, referrals, and comments.                                     |
| Respiratory Exam Addr/Phone<br>(respiratory exam address/phone) Page | HS_EXAM_RESPIRE1              | Maintain basic appointment and physician contact information for respiratory exams. |
| <u>Respiratory Exam - Exam Details Page</u>                          | HS_EXAM_RESPIRE2              | Maintain exam results, referrals, restrictions, and comments.                       |
| <u>Drug Test Data 1 Page</u>                                         | GVT_DRUG_TEST1                | Set up physician and test information for a drug test.                              |

| <b>Page Name</b>                          | <b>Definition Name</b> | <b>Usage</b>                                              |
|-------------------------------------------|------------------------|-----------------------------------------------------------|
| <u>Drug Test Data 2 Page</u>              | GVT_DRUG_TEST2         | Maintain test results, referrals, and comments.           |
| <u>ASO Exam Results BRA Page</u>          | ASO_EXAM_RSLT_BRA      | (BRA) Maintain basic ASO exam and physician information.  |
| <u>Biological Monitor Result BRA Page</u> | MONI_BIOL_RSLT_BRA     | (BRA) Maintain biological exam and physician information. |
| <u>Medical Exam Results BRA Page</u>      | MED_EXAM_RSLT_BRA      | (BRA) Review medical exam results.                        |
| <u>Drug Test BRA Page</u>                 | EMPL_DRUG_TEST_BRA     | (BRA) Enter worker's drug test information.               |

## Common Elements Used in Tracking Medical Exam Results

| <b>Field or Control</b> | <b>Description</b>                                                                                 |
|-------------------------|----------------------------------------------------------------------------------------------------|
| <b>Baseline</b>         | Select if this is a baseline exam.                                                                 |
| <b>Referral</b>         | Select a physician referral code from the list of available options, or enter a referral directly. |

## Physical Exam Address/Phone Page

Use the Physical Exam Address/Phone page (HS\_EXAM\_PHYSICAL1) to maintain basic appointment and physician contact information for physical exams.

Navigation:

**Workforce Monitoring > Health and Safety > Record Medical Exam Results > Physical Exam > Physical Exam Address/Phone**

This example illustrates the fields and controls on the Physical Exam Address/Phone page. You can find definitions for the fields and controls later on this page.

Physical Exam Address/Phone

Exam Details

Douglas Lewis

Person ID KU0001

Physical Exam Data

Exam Date05/27/2020

Exam Type

Next Exam

Physician ID

CountryUSAUnited States

Address

Phone

Edit Address

France

Medical Organization Code

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

| Field or Control | Description                                                                                                                                                                                                                                                                                                                  |
|------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Exam Date        | Enter the date of the exam. The current date appears by default. You can override it, if necessary. The system sorts exam result data rows by exam date.                                                                                                                                                                     |
| Exam Type        | Select an option from the available values.                                                                                                                                                                                                                                                                                  |
| Next Exam        | <div>The next exam date appears by default for the following exam types. You can override the defaults if the actual dates are different.</div> <div><div>Annual: Next exam is one year later.</div><div>Exposure: Next exam is six weeks later.</div><div>Periodic Surveillance: Next exam is six months later.</div></div> |
| Physician ID     | <div>Select from the available values, which come from the Physician Table.</div> <div>If you select a physician ID, the physician's address information from the Physician Table automatically fills in the address block. You can edit this address.</div>                                                                 |
| Edit Address     | Click this button to enter or modify an address. The appropriate address fields appear in the standardized address formats that you previously set up in the Country table.                                                                                                                                                  |

**(FRA) France**

| <b>Field or Control</b>          | <b>Description</b>                                                |
|----------------------------------|-------------------------------------------------------------------|
| <b>Medical Organization Code</b> | Select the medical organization that completed the physical exam. |

**Related Links**

“Administering Country Codes” (Application Fundamentals)

**Physical Exam - Exam Details Page**

Use the Physical Exam - Exam Details page (HS\_EXAM\_PHYSICAL2) to maintain physical exam results.

Navigation:

**Workforce Monitoring > Health and Safety > Record Medical Exam Results > Physical Exam > Exam Details**

This example illustrates the fields and controls on the Physical Exam - Exam Details page (1 of 2). You can find definitions for the fields and controls later on this page.

Physical Exam Address/Phone | **Exam Details**

Douglas Lewis | Person ID KU0001

**Physical Exam Details** | 1 of 1 | View All

Exam Date 05/27/2020 | Exam Type Annual

☐ Baseline  
☐ Organ Donor  
☐ Blood Donor  
 \*Blood Type Unknown  
 Referral  
 Comment

Germany

**Examination Results**

|   | Empl Record | Result |
|---|-------------|--------|
| 1 | 0           |        |



This example illustrates the fields and controls on the Physical Exam - Exam Details page (2 of 2). You can find definitions for the fields and controls later on this page.

France

Exam Time

This Exam

Next Exam

Time ZonePST

Regulatory Region

Work Capability

☒ Able To Work Normally

☐ Able To Work With Restrictions

☐ Unable to work

Work Restriction

1-1 of 1

View All

| Restr Code | Description | From Date | To Date |   |   |
|------------|-------------|-----------|---------|---|---|
|            |             |           |         | + | - |

Work Modification

1-1 of 1

View All

| Modfd Code | Description | From Date | To Date |   |   |
|------------|-------------|-----------|---------|---|---|
|            |             |           |         | + | - |

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

| Field or Control | Description                                          |
|------------------|------------------------------------------------------|
| Organ Donor      | Select if the employee is an organ donor.            |
| Blood Donor      | Select if the employee is a blood donor.             |
| Blood Type       | Select an option from the list of available options. |

(DEU) Germany

| Field or Control       | Description                                                                                                                                  |
|------------------------|----------------------------------------------------------------------------------------------------------------------------------------------|
| Empl Record and Result | For each employee record number that you enter, enter the result of the examination by selecting a value from the list of available options. |

(FRA) France

| Field or Control | Description                       |
|------------------|-----------------------------------|
| This Exam        | Enter the time for this exam.     |
| Next Exam        | Enter the time for the next exam. |

| <b>Field or Control</b>  | <b>Description</b>                                                                                                                                                                                              |
|--------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Work Capability</b>   | To enter information about the employee's ability to work, select the appropriate option: <i>Able to Work Normally</i> , <i>Able to Work With Restrictions</i> , or <i>Unable to Work</i> .                     |
| <b>Regulatory Region</b> | Enter the regulatory region in which the employee works. Select from the available values, which come from the Regulatory Region Table.                                                                         |
| <b>Work Restriction</b>  | Enter restriction code by selecting an option from the list of prompt values, which are from the Work Restrictions Table. Then enter the <b>From Date</b> and <b>To Date</b> for which the restriction applies. |
| <b>Work Modification</b> | Enter the modification code by selecting an option from the available values, which come from the Modified Work table. Then enter the <b>From Date</b> and <b>To Date</b> for which the modification applies.   |

## Audiometric Exam - Exam Details Page

Use the Audiometric Exam - Exam Details page (HS\_EXAM\_AUDIO2) to maintain audiometric exam details.

Navigation:

**Workforce Monitoring > Health and Safety > Record Medical Exam Results > Audiometric Exam > Exam Details**

This example illustrates the fields and controls on the Audiometric Exam - Exam Details page. You can find definitions for the fields and controls later on this page.

Audio Exam Address/Phone

Exam Details

Douglas Lewis

Person ID KU0001

Exam Information

1 of 1

View All

Exam Date 05/27/2020

Exam Type

Audiometer Serial Nbr

☐ Baseline

+

-

Left Ear

2505001K2K3K4K5K6K7K8K

Decibels

Trouble Frequency

Right Ear

2505001K2K3K4K5K6K7K8K

Decibels

Trouble Frequency

Hearing Classification

Referral

Comment

| Field or Control       | Description                                                |
|------------------------|------------------------------------------------------------|
| Decibels               | For each ear, enter the decibels the employee cannot hear. |
| Trouble Frequency      | For each decibel selection, select each trouble frequency. |
| Hearing Classification | Select a hearing classification.                           |

Eye Exam - Exam Details Page

Use the Eye Exam - Exam Details page (HS\_EXAM\_EYE2) to maintain exam results, referrals, and comments.

Navigation:

Workforce Monitoring > Health and Safety > Record Medical Exam Results > Eye Exam > Exam Details

This example illustrates the fields and controls on the Eye Exam - Exam Details page. You can find definitions for the fields and controls later on this page.

Eye Exam Address/Phone

Exam Details

Douglas Lewis

Person ID KU0001

Exam Information

1 of 1

View All

Exam Date 05/27/2020

Exam Type

+ -

Far Sight

Left

Right

Corrected

Uncorrected

Near Sight

Left

Right

Corrected

Uncorrected

☐ Baseline

☐ Correction Required

Referral

Color Vision

☒ Normal

☐ Abnormal

Comment

| Field or Control     | Description                                                                                                                                          |
|----------------------|------------------------------------------------------------------------------------------------------------------------------------------------------|
| Far Sight/Near Sight | Enter the specific exam results (up to 2 digits in length) for the <b>Left</b> and <b>Right</b> eyes, both <b>Corrected</b> and <b>Uncorrected</b> . |
| Correction Required  | Select this check box if the exam results indicate that this employee needs lenses or other corrective treatment.                                    |
| Color Vision         | Indicate if the patient's color vision is <b>Normal</b> or <b>Abnormal</b> .                                                                         |

Respiratory Exam - Exam Details Page

Use the Respiratory Exam - Exam Details page (HS\_EXAM\_RESPIRE2) to maintain exam results, referrals, restrictions, and comments.

Navigation:

Workforce Monitoring > Health and Safety > Record Medical Exam Results > Respiratory Exam > Exam Details

This example illustrates the fields and controls on the Respiratory Exam - Exam Details page. You can find definitions for the fields and controls later on this page.

Respiratory Exam Addr/Phone

Exam Details

Douglas Lewis

Person ID KU0001

Exam Information

1 of 1

View All

☐ Smoker

Exam Date

05/27/2020

Exam Type

☐ Baseline

Date of Exposure

Exposure Type

Contaminant Agent

Business Unit

GBIBU

Global Business Institute BU

Location Code

Referral

Comment

| Field or Control  | Description                                                                                                                                                                                                                                                                         |
|-------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Smoker            | Because information about the employee's history as a smoker comes from personal data, this check box is unavailable for entry. If the employee is not a smoker, the check box is not selected. If the check box contains a check mark, it indicates that the employee is a smoker. |
| Date of Exposure  | If it applies, enter the exposure date.                                                                                                                                                                                                                                             |
| Exposure Type     | If it applies, select a value from the list of available options.                                                                                                                                                                                                                   |
| Contaminant Agent | If it applies, select a value from the list of available options.                                                                                                                                                                                                                   |
| Business Unit     | Select a business unit for the employee's work location. Define business units in the Business Unit Table. The system automatically enters the associated description.                                                                                                              |
| Location Code     | Select a location code for the employee's work location. You define location codes in the Location Code table. The system automatically enters the associated description.                                                                                                          |

Drug Test Data 1 Page

Use the Drug Test Data 1 page (GVT\_DRUG\_TEST1) to set up physician and test information for a drug test.

Navigation:

**Workforce Monitoring > Health and Safety > Record Medical Exam Results > Drug Test Exam Details > Drug Test Data 1**

This example illustrates the fields and controls on the Drug Test Data 1 page. You can find definitions for the fields and controls later on this page.

Drug Test Data 1

Drug Test Data 2

Douglas Lewis

Person ID KU0001

Exam Information

1 of 1

View All

\*Exam Date05/27/2020

Exam Type

Exam Time In

Exam Time Out

Next Exam

Union Negotiated

Physician

CountryUSAUnited States

Address

Edit Address

Phone

| Field or Control | Description                                                                                                                                        |
|------------------|----------------------------------------------------------------------------------------------------------------------------------------------------|
| Exam Date        | Today's date appears by default. The system, however, enables you to change it appropriately. The system sorts exam result data rows by exam date. |
| Exam Type        | Select one: <i>For Cause</i> , <i>Mandatory</i> , or <i>Random</i> .                                                                               |
| Physician        | Enter the name of the employee's physician.                                                                                                        |
| Next Exam        | Indicate when the next exam is scheduled.                                                                                                          |
| Union Negotiated | Select to indicate that the test is mandated by a union agreement.                                                                                 |

Drug Test Data 2 Page

Use the Drug Test Data 2 page (GVT\_DRUG\_TEST2) to maintain test results, referrals, and comments.

Navigation:

**Workforce Monitoring > Health and Safety > Record Medical Exam Results > Drug Test Exam Details > Drug Test Data 2**

This example illustrates the fields and controls on the Drug Test Data 2 page. You can find definitions for the fields and controls later on this page.

Drug Test Data 1

Drug Test Data 2

Douglas Lewis

Person ID KU0001

Exam Information

Q

|

◀

◀

1 of 1

▶

▶

|

View All

\*Exam Date

05/27/2020

Exam Type

▼

+

-

Exam Results

☐ Pass

☐ Fail

☐ No Show for Exam

☐ Monitoring Required

Referral

▼

Comment

ASO Exam Results BRA Page

Use the ASO Exam Results BRA page (ASO\_EXAM\_RSLT\_BRA) to maintain medical exam and physician information.

Navigation:

Workforce Monitoring > Health and Safety > Record Medical Exam Results > ASO Exam Results BRA > ASO Exam Results BRA

This example illustrates the fields and controls on the ASO Exam Results BRA page.

**ASO Exam Results BRA**

ASO Exam Results BRA Biological Monitor Result BRA

Employee ID KRE0011 Empl Record 0 Name Lígia Ferreira Vieira da Silva

**Medical Exam Details**

\*PPP Exam Type  \*ASO Date

☐ Examination Abroad

Physician ID  Physician Name

\*CRM

\*Country  Brazil

\*State

NIS/PIIS

CPF National ID

Phone

Ability to Work

☐ Authorizes to Inform Results

**Laboratory Exam Details**

| Laboratory Exam Code | Description          | Order of Exam        | Indication of Results | Exam Date            | Comments             |
|----------------------|----------------------|----------------------|-----------------------|----------------------|----------------------|
| 1                    | <input type="text"/> | <input type="text"/> | <input type="text"/>  | <input type="text"/> | <input type="text"/> |

| Field or Control          | Description                                                                                                                                                                                                                                                                                                                                                            |
|---------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>PPP Exam Type</b>      | <p>Select the type for the ASO exam. Values are:</p> <p><i>Job/Position Change</i></p> <p><i>New Hire</i></p> <hr/> <p><b>Note:</b> Only one <i>New Hire</i> exam is allowed for the same employee and employee record.</p> <hr/> <p><i>Periodical according to PCMSO</i></p> <p><i>Return to Work</i></p> <p><i>Specific Monitoring</i></p> <p><i>Termination</i></p> |
| <b>ASO Date</b>           | <p>Select the date for the ASO exam.</p> <p>For each PPP exam type selected, the ASO date of the exam result must be unique for the employee.</p>                                                                                                                                                                                                                      |
| <b>Examination Abroad</b> | <p>Select if the ASO exam was taken outside of Brazil.</p> <p>If this field is selected, all physician-related fields are no longer displayed on this page. However, you must complete the <b>PCMSO Coordinator</b> section of the <u>Biological Monitor Result BRA Page</u>.</p>                                                                                      |



| <b>Field or Control</b>                        | <b>Description</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Physician ID</b>                            | <p>Enter the ID of the physician who conducted the exam. Only physicians with CRM setup are available for selection. The system populates the information of the selected physician in the <b>Medical Exam Details</b> section.</p> <p>Be sure to specify a physician in the <b>PCMSO Coordinator</b> section of the <u>Biological Monitor Result BRA Page</u> as well.</p> <p>Physicians are defined using the Physician BRA (HS_PHYSICIAN_BRA) component.</p> <p>See Also <u>Defining Medical Services Information</u>.</p> |
| <b>Physician Name, CRM, Country, and State</b> | <p>If the physician who conducted the exam is not in the system and the physician ID is not available, enter this required information manually.</p> <hr/> <p><b>Note:</b> If the employee's country of residence is Brazil, the <i>CRM</i>, <i>Country</i>, and <i>State</i> fields are required.</p> <hr/>                                                                                                                                                                                                                  |
| <b>NIS/PIS</b>                                 | Enter the valid NIS or PIS number of the physician, if the field is editable.                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>CPF National ID</b>                         | Enter the valid CPF number of the physician, if the field is editable.                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>Phone</b>                                   | Enter the phone number of the physician.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>Ability to Work</b>                         | <p>Specify if the employee is able to perform his or her job duties. Values are:</p> <p><i>Able</i></p> <p><i>Able with restrictions</i></p> <p><i>Unable</i></p>                                                                                                                                                                                                                                                                                                                                                             |
| <b>Authorizes to Inform Results</b>            | <p>Select if the employee agrees to submit the exam result to the Government using the S-2220 event in eSocial. When selected, eSocial includes the exam result information (selected in the <b>Indication of Results</b> field) in the S-2220 event for reporting.</p> <p>Clear this field if the employee does not wish to disclose the exam result to the Government. In this case, eSocial excludes the exam result information (selected in the <b>Indication of Results</b> field) from the S-2220 event.</p>           |

## Laboratory Exam Details

| <b>Field or Control</b>      | <b>Description</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Laboratory Exam Code</b>  | <p>(Required) Specify the code of a lab exam performed as part of the ASO exam. The same laboratory exam code can be entered multiple times as long as they have different exam dates.</p> <p>Laboratory exam codes are defined on the <a href="#">Laboratory Exams BRA Page</a>.</p>                                                                                                                                                                                                                |
| <b>Order of Exam</b>         | <p>Select <i>Initial</i> if this is the <i>first</i> exam done for the laboratory exam code in an ASO exam. Select <i>Sequential</i> for the ones (with the same code) that are performed after the first exam.</p> <p>Suppose that the employee performs another ASO exam and it includes the same laboratory exam as the previous ASO exam. Set the order of this laboratory exam to <i>Sequential</i>, and the laboratory exam date to be greater than the last one taken with the same code.</p> |
| <b>Indication of Results</b> | <p>Enter the result of the exam. Values are:</p> <p><i>Aggravation</i></p> <p><i>Altered or Modified</i></p> <p><i>None</i></p> <p><i>Normal</i></p> <p><i>Stable</i></p>                                                                                                                                                                                                                                                                                                                            |
| <b>Exam Date</b>             | <p>(Required) Enter the date that the laboratory exam was conducted, which must be earlier than the ASO date.</p>                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Comments</b>              | <p>Click to enter the observations for the exam on the Laboratory Exam Comments page (ASO_LAB_DTL_BRA) that appears.</p>                                                                                                                                                                                                                                                                                                                                                                             |

## Related Links

“S-2220 - Worker Health Monitoring – ASO” (PeopleSoft Global Payroll for Brazil)

## Biological Monitor Result BRA Page

Use the Biological Monitor Result BRA page (MONI\_BIOL\_RSLT\_BRA) to maintain biological exam and physician information.

Navigation:

Workforce Monitoring > Health and Safety > Record Medical Exam Results > ASO Exam Results BRA > Biological Monitor Result BRA

This example illustrates the fields and controls on the Biological Monitor Result BRA page.

ASO Exam Results BRA

Biological Monitor Result BRA

Employee ID

KR0011

Empl Record

0

Name

Claudio Flaquer

ASO Information

Q

|

1 of 1

View All

PPP Exam Type

Job/Position Change

ASO Date

Monitoring Results

Q

|

1 of 1

View All

\*Chemical Agent Code

Q

+

-

\*Analysis Code

Q

\*Biological Material

Q

\*Excessive Exposition

\*Order of Exam

\*Indication of Results

This example illustrates the fields and controls on the Biological Monitor Result BRA page (2 of 2).

PCMSO Coordinator

Physician ID

Q

Physician Name

CRM

Country

BRA

Brazil

State

Q

NIS/PIS

CPF National ID

Monitoring Results

| Field or Control                                           | Description                                                                                                                                                                                                                                                                                                                                                                |
|------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Chemical Agent Code, Analysis Code and Biological Material | <p>Specify the chemical agent code, analysis code, and biological material of the ASO exam.</p> <p>These codes are defined on the Chemical Agent Code page (BRA BIOL_MONIT_BRA). Available analysis codes are filtered by the chemical agent code selected, and the selected analysis code determines the biological material values that are available for selection.</p> |

| <b>Field or Control</b>      | <b>Description</b>                                                                                                                                                                                                                      |
|------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Excessive Exposition</b>  | Select <i>Yes</i> if the employee is exposed to an unusually high amount of the selected chemical agent. Otherwise, select <i>No</i> .                                                                                                  |
| <b>Order of Exam</b>         | Select:<br><br><i>Not Applicable</i> if the exam order is irrelevant.<br><br><i>Referential</i> if this is the <i>first</i> ASO exam done for the employee.<br><br><i>Sequential</i> for the ASO exams that are performed subsequently. |
| <b>Indication of Results</b> | Enter the result of the exam. Values are:<br><br><i>Aggravation</i><br><br><i>Modified</i><br><br><i>Normal</i><br><br><i>Not Occupational</i><br><br><i>Occupational</i><br><br><i>Stable</i>                                          |

## PCMSO Coordinator

| <b>Field or Control</b>                        | <b>Description</b>                                                                                                                                                                                                                                                                                                                                                                 |
|------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Physician ID</b>                            | Enter the ID of the physician who serves as the PCMSO coordinator of this exam. Only physicians who are identified as <i>PCMSO Coordinator</i> on the <a href="#">Medical Register Page</a> are available for selection.<br><br>Physicians are defined using the Physician BRA (HS_PHYSICIAN_BRA) component.<br><br>See Also <a href="#">Defining Medical Services Information</a> |
| <b>Physician Name, CRM, Country, and State</b> | If the physician is not in the system and the physician ID is not available, enter this required information manually.                                                                                                                                                                                                                                                             |
| <b>NIS/PIS</b>                                 | Enter the valid PIS or NIS number of the physician.                                                                                                                                                                                                                                                                                                                                |

| <i>Field or Control</i> | <i>Description</i>                           |
|-------------------------|----------------------------------------------|
| <b>CPF National ID</b>  | Enter the valid CPF number of the physician. |

## Related Links

“S-2220 - Worker Health Monitoring – ASO” (PeopleSoft Global Payroll for Brazil)

## Medical Exam Results BRA Page

Use the Medical Exam Results BRA page (MED\_EXAM\_RSLT\_BRA) to review medical exam results.

Navigation:

**Workforce Monitoring > Health and Safety > Record Medical Exam Results > Medical Exam Results BRA > Medical Exam Results BRA**

This example illustrates the fields and controls on the Medical Exam Results BRA page.

**Medical Exam Results BRA**

Claudio Flaquer Person ID KR0011

**Medical Exam Details** [Search] [1 of 1] [View All]

Type of Exam [ + - ]

Exam Date 05/27/2020

Medical Exam Type ☐ Baseline

**PPP Exam Details** [Search] [1 of 1] [View All]

Brazilian Exam Type [Dropdown] [ + - ]

**PPP Result Details**

Result Type ☒ Normal ☐ Altered

Altered Result ☐ Stable ☐ Severe

Severe Result ☐ Occupational ☐ Non-Occupational

## Drug Test BRA Page

Use the Drug Test BRA page (EMPL\_DRUG\_TEST\_BRA) to enter worker’s drug test information.

Navigation:

**Workforce Monitoring > Health and Safety > Record Medical Exam Results > Drug Test BRA > Drug Test BRA**

This example illustrates the fields and controls on the Drug Test BRA page.

**Drug Test BRA**
[New Window](#) | [Help](#) | [Personalize Page](#)

Employee ID KR0011      Empl Record 0      Name Claudio Flaquer

**Exam Information**
 |  |  |  | 1 of 1

Exam Type

\*Exam Date

\*Exam Number

\*Physician ID

\*Physician Name

\*Organ Statutory

\*Register Number

\*State

\*Laboratory Provider ID

\*Laboratory

\*CNPJ Laboratory

| Field or Control                 | Description                                                                                                                                                                                                                                                                                                                                                 |
|----------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Exam Type</b>                 | <p>Select the type of the drug test. Values are:</p> <p><i>Hire</i></p> <p><i>Professional Driver</i></p> <p><i>Termination</i></p> <p>Do not enter more than one drug test of the same exam type for the same exam date.</p>                                                                                                                               |
| <b>Refused by Employee</b>       | <p>Select if the employee did not agree to and therefore did not perform a drug test before termination. This field appears if the selected exam type is <i>Termination</i>.</p>                                                                                                                                                                            |
| <b>Expected Termination Date</b> | <p>Enter the expected termination date of the employee. This field appears if the <b>Refused by Employee</b> field is selected.</p> <p>If the employee refused to take the drug test before termination, the system uses the expected termination date as the exam date for the drug test. The rest of the fields on this page are no longer displayed.</p> |
| <b>Exam Date</b>                 | Enter the date when the drug test was taken.                                                                                                                                                                                                                                                                                                                |
| <b>Exam Number</b>               | <p>Enter the drug test number.</p> <p>If the selected exam type is <i>Professional Driver</i>, enter the 11-digit drug test number in this format, <i>AA999999999</i>, where <i>AA</i> a 2-digit alphabetical string, and <i>999999999</i> a 9-digit numeric string.</p>                                                                                    |

| <b>Field or Control</b>                                                 | <b>Description</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|-------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Physician ID</b>                                                     | <p>Select the name of the employee's physician. Once selected, the <b>Organ Statutory</b>, <b>Register Number</b> and <b>State</b> field values of the physician are populated automatically on the page if available.</p> <p>Physicians are defined using the Physician BRA (HS_PHYSICIAN_BRA) component.</p> <p>See Also <a href="#">Defining Medical Services Information</a>.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| <b>Physician Name, Organ Statutory, Register Number, CRM, and State</b> | <p>If the physician is not defined in the system, enter this physician information manually.</p> <p><b>Organ Statutory:</b> Select <i>RMS</i>, <i>CRM</i>, or <i>CRO</i>. This field is not shown if the selected exam type is <i>Professional Driver</i>.</p> <p><b>Register Number:</b> Enter the register number of the selected organ statutory. This field is not shown if the selected exam type is <i>Professional Driver</i>.</p> <p><b>CRM:</b> Specify the CRM register number. This field appears if the selected exam type is <i>Professional Driver</i>.</p> <hr/> <p><b>Note:</b> If the selected exam type is <i>Professional Driver</i>, the <b>CRM</b> and <b>State</b> fields become optional under these conditions: the exam date is later than or equal to the employee address's effective date, the employee address type is <i>Home</i>, the status is <i>Active</i>, and the employee's country of residence is not Brazil.</p> <hr/> |
| <b>Laboratory Provider ID</b>                                           | <p>Select the laboratory from where the drug test was taken. Once selected, its associated CNPJ number is populated automatically on this page.</p> <p>Laboratory providers are defined on the <a href="#">Laboratory Provider Page</a>.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Laboratory and CNPJ Laboratory</b>                                   | <p>If the laboratory is not defined in the system, enter its name and CNPJ number manually.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |





# (BRA) Running Health and Safety Reports for Brazil

## Running the Work Risk Report for Brazil

This section discusses how to run the Work Risk report for Brazil.

### Page Used to Run the Work Risk Report for Brazil

| Page Name                  | Definition Name    | Usage                                                                             |
|----------------------------|--------------------|-----------------------------------------------------------------------------------|
| <u>CAT Report BRA Page</u> | CATRC_INCIDENT_BRA | Monitor work risks by establishment ID, department ID, employee, and incident ID. |

### CAT Report BRA Page

Use the CAT Report BRA page (CATRC\_INCIDENT\_BRA) to monitor work risks by establishment ID, department ID, employee, and incident ID.

Navigation:

**Workforce Monitoring > Health and Safety > Reports > CAT Report BRA**

This example illustrates the fields and controls on the CAT Report BRA page. You can find definitions for the fields and controls later on this page.

CAT Report BRA

Run Control ID T1

Report Manager

Process Monitor

Run

Parameters

\*Company KRC  Empresa Demonstração Ltda

\*Via Number 1

Begin Date  End Date

Selection Criteria

☒ Select Establishment ID

☐ Select Department ID

☐ Select Employee

☐ Select Incident ID

☐ Exclude Data

Establishment Data

\*Establishment ID KRC1-1  Matriz São Paulo

+

-

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**Note:** Create CAT reports using the “CAT Form Page” (PeopleSoft Global Payroll for Brazil) if you use the S-2210 event in eSocial to submit work accident data to the Government.

Select the appropriate values for the fields that appear on the page. The system displays a different set of fields at the bottom of the page for each of the options that you select in the Selection Criteria group box.

## Running the Biprofessional Profile Report for Brazil

This section discusses how to run the Biprofessional Profile report for Brazil.

### Page Used to Run the Biprofessional Profile Report for Brazil

| Page Name                                                                   | Definition Name | Usage                                                                                          |
|-----------------------------------------------------------------------------|-----------------|------------------------------------------------------------------------------------------------|
| PPP Report BRA Page<br>(Perfil Profesiografico Provisional report BRA page) | PPP_RC_BRA      | Add profile information to the system by establishment ID, department ID, group ID, or worker. |

### PPP Report BRA Page

Use the PPP Report BRA page (PPP\_RC\_BRA) to add profile information to the system by establishment ID, department ID, group ID, or worker.

Navigation:

**Workforce Monitoring > Health and Safety > Reports > PPP Report BRA**

This example illustrates the fields and controls on the PPP Report BRA page (1 of 2). You can find definitions for the fields and controls later on this page.

Run Control ID

T1

Report Manager

Process Monitor

Run

Parameters

\*Company

KRC

Empresa Demonstração Ltda

\*Begin Date

\*End Date

\*Issue Date

05/27/2020

\*Parameter ID

\*PPP Responsible

PPP Action / Reasons

1-1 of 1

View All

| *Action | Description | *Reason | Description |   |   |
|---------|-------------|---------|-------------|---|---|
|         |             |         |             | + | - |

This example illustrates the fields and controls on the PPP Report BRA page (2 of 2). You can find definitions for the fields and controls later on this page.

The screenshot displays a web interface for the PPP Report BRA page (2 of 2). It features three main sections:

- Observation Option:** Contains three radio buttons: ☒ No Observation, ☐ Print Observation, and ☐ Override Observation.
- Selection Criteria:** Contains four radio buttons: ☒ Select Establishment ID, ☐ Select Department ID, ☐ Select Group ID, and ☐ Select Worker.
- Establishment Data:** Includes a search bar with the text "Establishment ID" and a magnifying glass icon. To the right of the search bar is a pagination control showing "1 of 1" with navigation arrows and a "View All" link. Below the search bar are two buttons, "+" and "-".

Select the appropriate values for the fields that appear on the page. The system displays a different set of fields at the bottom of the page for each of the options that appear in the Selection Criteria group box.

If you select the **Override Observation** option, the system displays the **Detailed Description** field. Use this field to write a description of why you are overriding the observation.



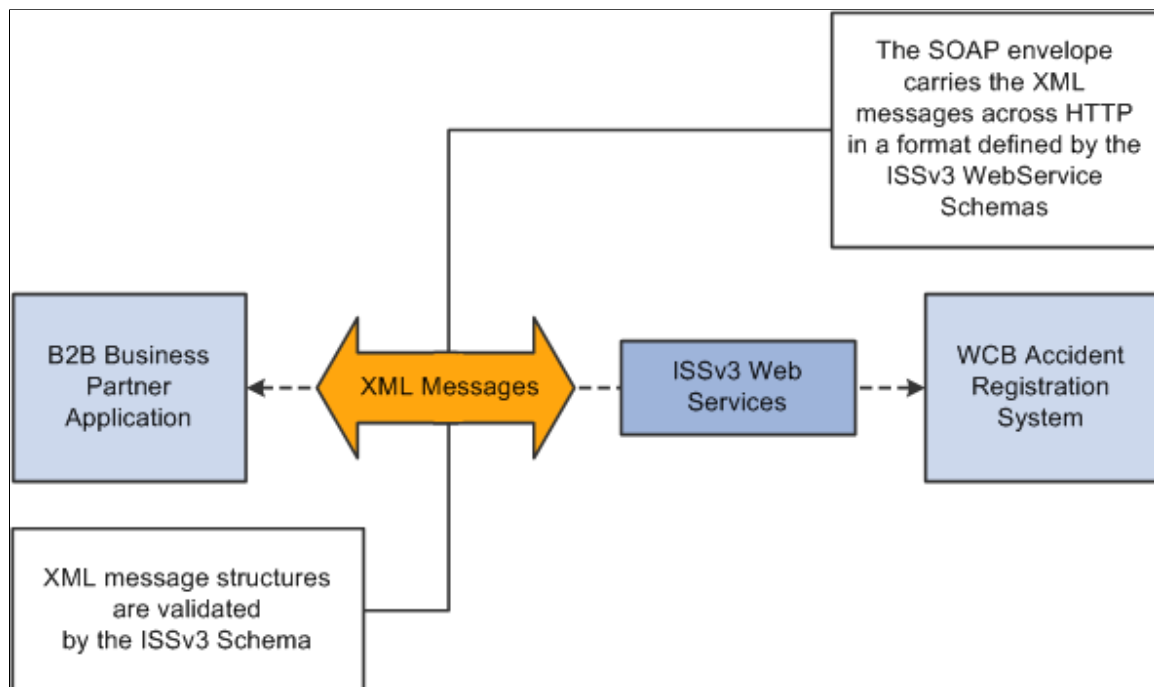
# (CAN) Preparing to Report to the Workers Compensation Board

## Understanding the WorkSafeBC Web Service

The British Columbia (B.C.) Workers' Compensation Board (WCB), also known as WorkSafeBC, uses the Interchange Specification Standard Version 3 (ISSv3) web service to submit and receive data from the WCB Accident Registration System. The ISSv3 web service is an Extensible Markup Language (XML) application that permits data transfer between employers using PeopleSoft HR applications and the WCB's Accident Registration System. By creating an XML document in the form of a Simple Object Access Protocol (SOAP) message, an employer can send accident information to the web service across the Internet, and receive a response, also in the form of an XML document. Upon receiving an XML document, the web services interface validates the data against business rules and transforms the XML data into a format understood by the WCB Accident Registration System. The system rejects XML documents that do not pass the validation and does not save the submitted data in the WCB Accident Registration System.

The following diagram illustrates the WorkSafeBC web service process:

WorkSafeBC web service process flow



---

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

---

## Prerequisites

Before you can use the new WorkSafeBC Web Service functionality, you must:

- Confirm your PeopleTools release.
- Identify a static Internet protocol (IP) address from which your system calls WorkSafeBC's web services. This is required to connect to WCB's Accident Registration System
- Register with WorkSafeBC Web Services.
- Set Up Integration Broker.
- Enter a phone number for your location.
- Change the ISSv3 web service URL.

### Confirming your PeopleTools Release

You must be running PeopleTools 8.48 or later to use the WorkSafeBC Web Service functionality.

### Identifying a Static Internet Protocol (IP) Address

To protect the integrity of the ISSv3 Web Service, WorkSafeBC uses several firewalls, each of which requires authentication before permitting messages to pass. Therefore, before an employer requests access to the ISSv3 Web Service, it must register with WorkSafeBC one or more static IP addresses from which its system calls the Web Services.

### Registering with WorkSafeBC Web Services

Before you begin implementing and testing your web service functionality, you must register with WorkSafeBC. Registration enables you to:

- Use WorkSafeBC's business-to-business services.
- Use the web service feature in PeopleSoft HR to electronically submit the Employer's Report of Injury (Form 7).
- Complete WorkSafeBC's web service testing requirements before being permitted access to the production environment (optional). Optional testing may include a connectivity test and/or a data test.

To obtain instructions on web service registration, visit the [WorkSafe BC](#) website.

## Setting Up Integration Broker

The WorkSafeBC Web Service enhancement uses PeopleSoft Integration Broker to transmit information between your PeopleSoft system and the WCB system. To use Integration Broker for this purpose, you need to configure the default local node, PSFT\_HR, and make sure that it is active.

The WorkSafeBC Web Service enhancement uses the following four service operations:

- RETRIEVEEMPLOYERCODES
- RETRIEVEINCIDENTSTATUS
- RETRIEVESYSTEMCODES
- SUBMITINCIDENT

## Entering a Phone Number for your Location

Telephone Area Code and Telephone Number are mandatory fields for WCB for

- Reporting employers
- Submitting employers
- Payroll contacts
- Workers

Telephone number, however, is not a mandatory field in PeopleSoft HR, so it is imperative that you enter an area code and telephone number on the Company page. The system uses this telephone number if no telephone number exists for one of the entities listed above.

## Changing the ISSv3 Web Service URL

Although completing WorkSafeBC's web service testing requirements is an optional step, we deliver a client validation ISSv3 web service URL so that you can perform this testing if you wish. In test mode, you can send web service messages to request system codes, request employer-related codes, and submit injury reports. Only the ability to request submission status is disabled for client validation testing. You need to contact WorkSafeBC prior to connecting to the production database. In addition, you need to change the client validation URL to the production URL. To change the ISSv3 web service URL:

1. Access the Service page (PeopleTools, Integration Broker, Integration Setup, Services) for the ISSV3 service.
2. In the Existing Operations group box, click the RETRIEVEEMPLOYERCODES.V1 link to access the Service Operations component for the RETRIEVEEMPLOYERCODES service operation.
3. Access the Routings page of the Service Operations component.
4. In the Routing Definitions group box, click the ~IMPORTED~22075 link to access the Routings component for the ~IMPORTED~22075 routing.
5. Access the Connector Properties page.
6. Change the value of the PRIMARYURL property ID from <https://cv.b2b.online.worksafebc.com/ISSV3/ISSV3.aspx> to <https://b2b.online.worksafebc.com/ISSV3/ISSV3.aspx>.

7. Click Save.
8. Repeat these steps for the routings associated with the RETRIEVEINCIDENTSTATUS, RETRIEVESYSTEMCODES, and SUBMITINCIDENT service operations.

See Also *PeopleTools: Integration Broker*

## Related Links

“Establishing Locations” (Application Fundamentals)

## Editing Report Data

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

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

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

## Understanding BC WCB Reporting Based Upon Incident Outcomes

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

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



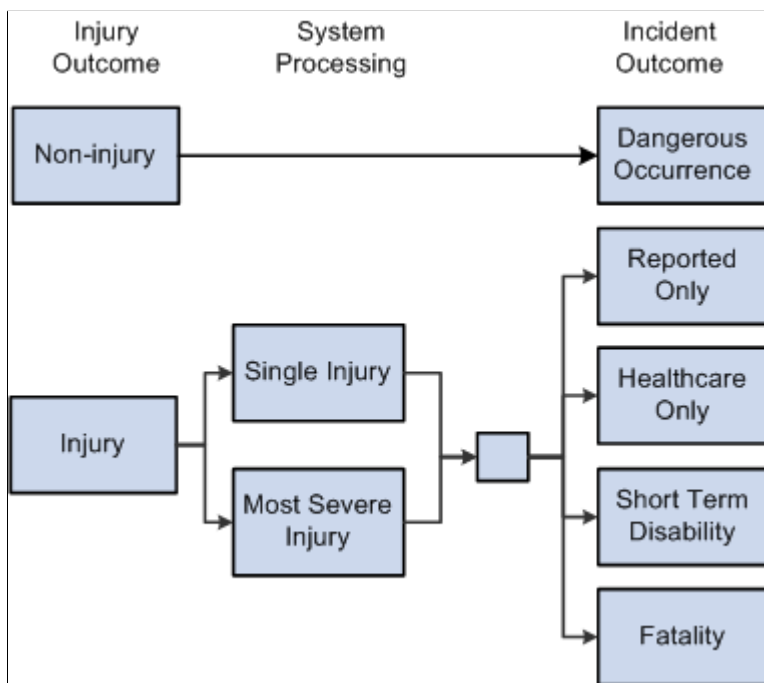
| <b><i>Incident Outcome</i></b> | <b><i>Definition</i></b>                                                                                                                                    |
|--------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Fatality                       | An event in which one or more workers are injured and at least one injured worker dies. First aid and health care practitioner care may have been rendered. |

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

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

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

Diagram showing how incident outcome is derived from injury outcome.



## Processing Data for WorkSafeBC's Web Service

This section provides an overview of processing data for WorkSafeBC's web service.

## Pages Used to Process Data for WorkSafeBC's Web Service

| <b>Page Name</b>                          | <b>Definition Name</b> | <b>Usage</b>                                                                  |
|-------------------------------------------|------------------------|-------------------------------------------------------------------------------|
| <u>Register Employer Web Service Page</u> | WCB_WEB_REG_DTLS       | Enter employer WCB registration details.                                      |
| <u>Employer-Related Codes Page</u>        | WCB_EMPLR_REL_CD       | Request employer codes.                                                       |
| <u>System Codes Page</u>                  | WCB_SYSTEM_CD          | Request system codes.                                                         |
| <u>Extract WCB Injury Data CAN Page</u>   | RUNCTL_WCB_501         | Run the OHS501BC SQR process to populate staging tables with WCB injury data. |
| <u>Submit Injury Report Page</u>          | INIT_BC_WCB_WEB        | Create and transmit injury reports.                                           |
| <u>Review Error Messages Page</u>         | WCB_INJ_ERR_RESP       | Review error messages received from the WCB.                                  |
| <u>Request Submission Status Page</u>     | WCB_SUB_STAT           | Request submission status.                                                    |
| <u>Review Submission Status Page</u>      | WCB_INC_SUB_STAT       | Review the submission status of an injury report.                             |
| <u>Review Success Messages Page</u>       | WCB_INJ_RPT_RESP       | Review success messages received from the WCB.                                |

## Understanding WorkSafeBC's Web Service Processes

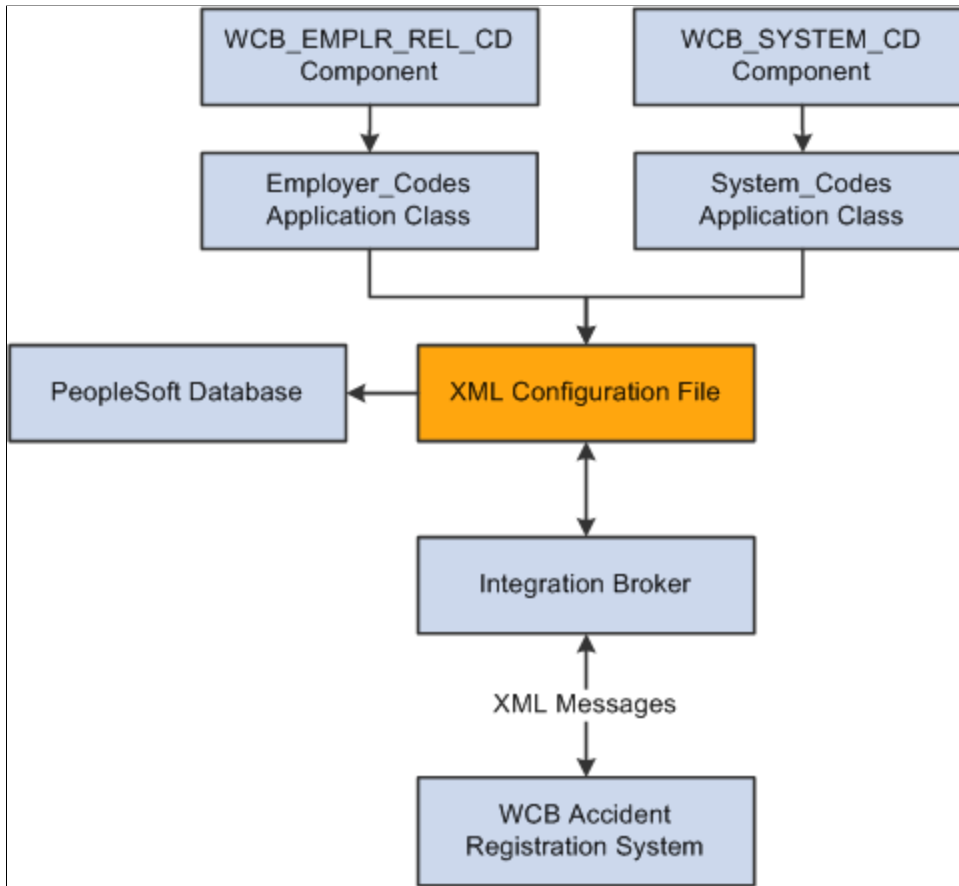
Using the WorkSafeBC web service you can:

- Request employer and system codes.
- Submit injury reports.
- Request submission statuses.

### Requesting Employer and System Codes

This diagram illustrates the process flow for requesting employer and system codes using the WorkSafeBC web service:

Process flow for requesting employer and system code through WorkSafeBC web service.

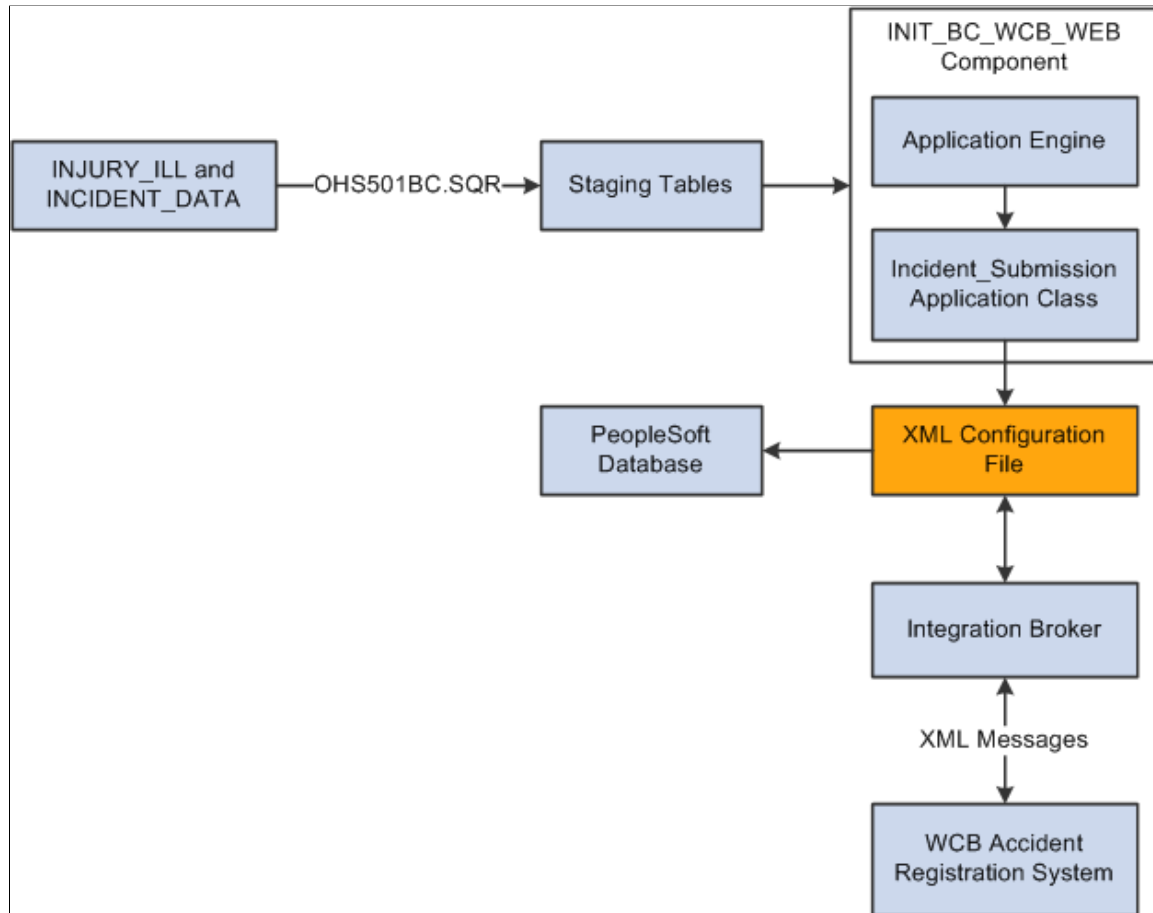


1. Using the WCB\_EMPLR\_REL\_CD or WCB\_SYSTEM\_CD component, you initiate the Employer\_Codes or System\_Codes application class, respectively.
2. Both application classes generate an XML file and initiate a web service operation through Integration Broker to send the XML file as a SOAP envelope to WCB's Accident Registration System.
3. After receiving the XML file, the WCB system validates it and returns either completion codes confirming that the validation was successful, or error codes indicating that the validation failed.
4. Based on the response from WCB, the PeopleSoft system parses the XML file and extracts the data to update the database.

## Submitting Injury Reports

This diagram illustrates the process flow for submitting injury reports using the WorkSafeBC web service:

Process flow for submitting injury reports using WorkSafeBC web service.



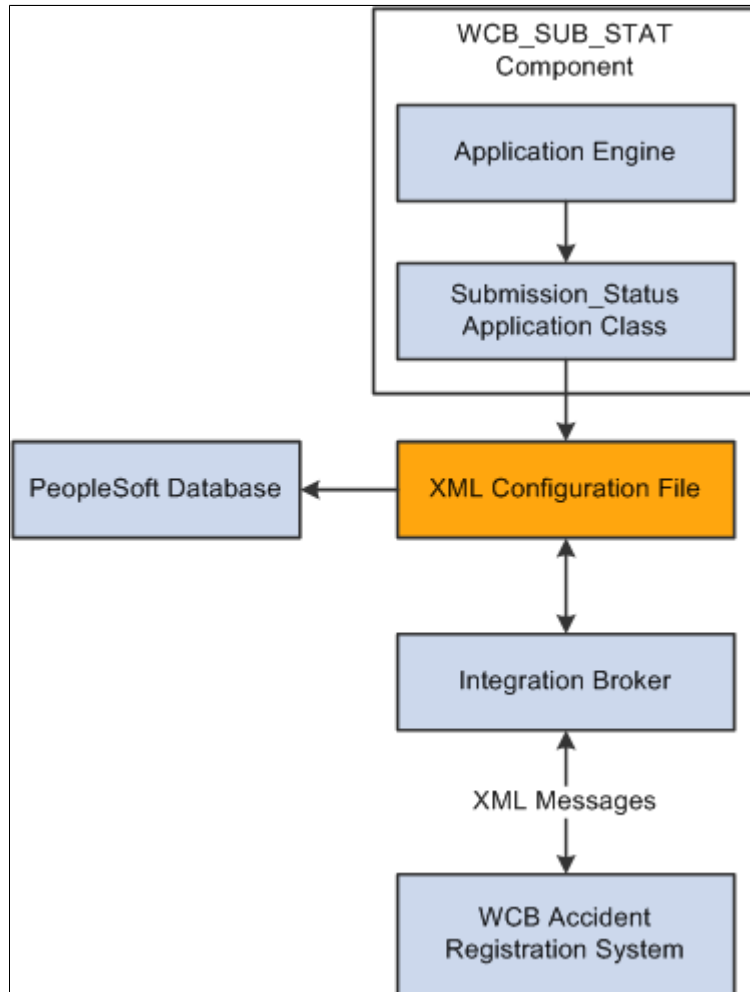
1. You initiate the OHS501BC.SQR process to collect injury and incident data from the INJURY\_ILL and INCIDENT\_DATA tables and use it to populate staging tables. The process collects the following types of data:
  - Incident/injury data.
  - Corrective preventative actions.
  - Non-employee information.
  - Employee information.
  - Employment information.
  - Claims information.
2. Using the INIT\_BC\_WCB\_WEB component, you trigger the Incident\_Submission application class, which collects data from the staging tables and uses it to generate an XML file. The same application class also initiates a web service operation through Integration Broker to send the XML file as a SOAP envelope to the WCB's Accident Registration System.
3. After receiving the XML file, the WCB system validates it and returns either completion codes confirming that the validation was successful, or error codes indicating that the validation failed.

- Based on the response from WCB, the PeopleSoft system parses the XML file and extracts the data to update the database.

## Requesting Submission Statuses

This diagram illustrates the process flow for requesting submission statuses using the WorkSafeBC web service:

Process flow for requesting submission statuses using WorkSafeBC web service.



- Using the WCB\_SUB\_STAT component, you initiate the Submission\_Status application class.
- The application class generates an XML file and initiates a web service operation through Integration Broker to send the XML file as a SOAP envelope to WCB's Accident Registration System.
- After receiving the XML file, the WCB system validates it and returns either completion codes confirming that the validation was successful, or error codes indicating that the validation failed.
- Based on the response from WCB, the PeopleSoft system parses the XML file and extracts the data to update the database.

## Register Employer Web Service Page

Use the Register Employer Web Service page (WCB\_WEB\_REG\_DTLS) to enter employer WCB registration details.

Navigation:

**Set Up HCM > Product Related > Workforce Monitoring > Health and Safety > WCB Web Service CAN > Register Employer Web Service > Register Employer Web Service**

This example illustrates the fields and controls on the Register Employer Web Service page. You can find definitions for the fields and controls later on this page.

**Register Employer Web Service**

**Employer Details**

1-1 of 1

View All

|   | *WCB Employer ID     | *Business Partner Identifier | *Business Partner Type | *Business Partner Token |   |   |
|---|----------------------|------------------------------|------------------------|-------------------------|---|---|
| 1 | <input type="text"/> | <input type="text"/>         | <input type="text"/>   | <input type="text"/>    | + | - |

| <i>Field or Control</i>            | <i>Description</i>                                                            |
|------------------------------------|-------------------------------------------------------------------------------|
| <b>WCB Employer ID</b>             | Enter the employer ID assigned by the WCB.                                    |
| <b>Business Partner Identifier</b> | Enter the six-digit WCB account number.                                       |
| <b>Business Partner Type</b>       | Enter the role type assigned to the employer during web service registration. |
| <b>Business Partner Token</b>      | Enter the unique credential issued to each business partner.                  |

## Employer-Related Codes Page

Use the Employer-Related Codes page (WCB\_EMPLR\_REL\_CD) to request employer codes.

Navigation:

**Set Up HCM > Product Related > Workforce Monitoring > Health and Safety > WCB Web Service CAN > Employer-Related Codes > Employer-Related Codes**

This example illustrates the fields and controls on the Employer-Related Codes page. You can find definitions for the fields and controls later on this page.

Employer ID

Q

☐ Select All Employer IDs

Request Employer Codes

Clear

Employer-Related Codes

Q

1 of 1

View All

Employer ID

Effective Date

Details

Q

1-1 of 1

|   | Operating Location | Start Date | End Date | Class/Subclass | Start Date | End Date |
|---|--------------------|------------|----------|----------------|------------|----------|
| 1 |                    |            |          |                |            |          |

Use this page to retrieve employer-related codes from the WCB. An employer should run this web service every time that it adds, changes or deletes operating locations or industry classifications because the WCB validates every web service transmission to ensure that the codes are correct.

| Field or Control        | Description                                                                                                                                                                                                                                                                           |
|-------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Employer ID             | Enter the ID of the employer for which you want to request employer-related codes.                                                                                                                                                                                                    |
| Select All Employer IDs | Select to request codes for all valid employer IDs.                                                                                                                                                                                                                                   |
| Request Employer Codes  | Click to initiate the employer-related codes request to the WCB. The WCB sends a response message containing the valid employer-related code values for the selected employer ID.                                                                                                     |
| Clear                   | Click to deselect the displayed information in the Employer Related Codes group box.                                                                                                                                                                                                  |
| Operating Location      | Displays the identification number of the employer's operating location(s) as assigned by the WCB. The <b>Start Date</b> and <b>End Date</b> fields next to this field represent the date on which the location became active and the date on which it became inactive, respectively. |
| Class/Subclass          | Displays the type of industry classification assigned to the employer by the WCB. The <b>Start Date</b> and <b>End Date</b> fields next to this field represent the date on which the classification unit became active and the date on which it became inactive, respectively.       |

System Codes Page

Use the System Codes page (WCB\_SYSTEM\_CD) to request system codes.

Navigation:

Set Up HCM > Product Related > Workforce Monitoring > Health and Safety > WCB Web Service CAN > System Codes > System Codes

This example illustrates the fields and controls on the System Codes page. You can find definitions for the fields and controls later on this page.

System Codes

Employer ID

\*System Category

☐ Select All System Categories

Request System Codes

Clear

System Codes

1 of 1

View All

System Category

Effective Date

Details

1-1 of 1

View All

|   | System Code | Description | Start Date | End Date |
|---|-------------|-------------|------------|----------|
| 1 |             |             |            |          |

Use this page to request system codes. It is necessary to request system codes only once during implementation unless new system codes are added.

| Field or Control             | Description                                                                                                                                                              |
|------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Employer ID                  | Select the ID of the employer for which you are requesting system codes.                                                                                                 |
| System Category              | Select the system category for which you are requesting codes. This field becomes unavailable for edit if the <b>Select All System Categories</b> check box is selected. |
| Select All System Categories | Select to request system codes for all valid system categories.                                                                                                          |
| Request System Codes         | Click to initiate the system codes request to the WCB. The WCB sends a response message containing the valid system code values for the selected system category.        |
| Clear                        | Click to deselect the displayed information in the System Codes group box.                                                                                               |



| <b>Field or Control</b> | <b>Description</b>                                                |
|-------------------------|-------------------------------------------------------------------|
| <b>System Code</b>      | Displays the system codes of the system category that you select. |
| <b>Description</b>      | Displays the description of the system code.                      |
| <b>Start Date</b>       | Indicates the date on which the system code became active.        |
| <b>End Date</b>         | Indicates the date on which the system code became inactive.      |

**Note:** One of the system codes is SEXTY, which is the gender code. The PeopleSoft system derives the gender of an Empl ID from the Personal Data table, so the gender values of Male and Female are hard-coded. These values are the same as those currently delivered by the WCB, but if these values change or new values are added, you need to update the hard coded PeopleSoft values accordingly.

## Extract WCB Injury Data CAN Page

Use the Extract WCB Injury Data CAN page (RUNCTL\_WCB\_501) to run the OHS501BC SQR process to populate staging tables with WCB injury data.

Navigation:

**Workforce Monitoring > Health and Safety > Collect Health/Safety Data > Extract WCB Injury Data CAN > Extract WCB Injury Data CAN**

This example illustrates the fields and controls on the Extract WCB Injury Data CAN page. You can find definitions for the fields and controls later on this page.

### Extract WCB Injury Data CAN

Run Control ID T1
Report Manager
Process Monitor
Run

#### Transaction Details

\*Employer ID 
\*Operating Location 
\*Name of Person Transmitting  (Last Name, First Name)
\*Phone Number  Phone Extension 
Email ID 
Date Transmitted 05/27/2020  Time 3:40PM

#### Data Request Parameters

1-1 of 1

|   | *Incident Number     |                                  |                                  |  |
|---|----------------------|----------------------------------|----------------------------------|--|
| 1 | <input type="text"/> | <input type="button" value="+"/> | <input type="button" value="-"/> |  |

(CAN) Use this page to run the OHS501BC SQR process, which extracts injury data to staging tables, where it can then be transmitted to the WCB.

### Transaction Details

| <b>Field or Control</b>            | <b>Description</b>                                                                           |
|------------------------------------|----------------------------------------------------------------------------------------------|
| <b>Employer ID</b>                 | Enter the employer ID assigned by the WCB.                                                   |
| <b>Operating Location</b>          | Enter your organization's operating location ID.                                             |
| <b>Name of Person Transmitting</b> | Enter the name of the primary point of contact for the transmitting organization.            |
| <b>Phone Number</b>                | Enter the phone number of the primary point of contact for the transmitting organization.    |
| <b>Phone Extension</b>             | Enter the phone extension of the primary point of contact for the transmitting organization. |
| <b>Email ID</b>                    | Enter the email address of the primary point of contact for the transmitting organization.   |
| <b>Date Transmitted</b>            | Enter the date on which the injury report data was extracted.                                |
| <b>Time</b>                        | Enter the time at which the injury report data was extracted.                                |

### Data Request Parameters

Use this group box to select the incidents for which you want to extract injury data.

## Submit Injury Report Page

Use the Submit Injury Report page (INIT\_BC\_WCB\_WEB) to create and transmit injury reports.

Navigation:

**Workforce Monitoring > Health and Safety > WCB Web Services CAN > Submit Injury Report > Submit Injury Report**

This example illustrates the fields and controls on the Submit Injury Report page. You can find definitions for the fields and controls later on this page.

Submit Injury Report

Employer ID223344

Submit Injury Report

Injury Report Details

1-1 of 1

|                          | Incident Number        | Event Report Type | Resubmission             | Transaction Identifier | Message Status | Details |                                  |                                  |
|--------------------------|------------------------|-------------------|--------------------------|------------------------|----------------|---------|----------------------------------|----------------------------------|
| <input type="checkbox"/> | 1 <input type="text"/> |                   | <input type="checkbox"/> |                        |                | Details | <input type="button" value="+"/> | <input type="button" value="-"/> |

| Field or Control       | Description                                                                                                                                                                                 |
|------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Submit Injury Report   | Click to submit the selected injury reports.                                                                                                                                                |
| Incident Number        | Enter the unique identifying number of the incident you want to report to the WCB.                                                                                                          |
| Event Report Type      | Displays the event report type of the incident number you select.                                                                                                                           |
| Resubmission           | Indicates that the employer has made updates to a previously reported incident and is resubmitting it.                                                                                      |
| Transaction Identifier | Displays the unique identifier returned by the WCB as part of the response to a successfully validated transmission. This field is populated only if you select the Resubmission check box. |
| Message Status         | Indicates whether a transmitted message resulted in success or error.                                                                                                                       |
| Details                | Click to open the Review Error Messages page or Review Success Messages page depending on whether the message was transmitted successfully.                                                 |

**Note:** You should submit to the WCB only incidents with an outcome of Short Term Disability or Health Care Only. Do not submit incidents with an outcome of Dangerous Occurrence, Reported Only, and Fatality through the WorkSafeBC web service. The outcome of an incident is displayed in the Outcome field of the Incident Details – Incident page.

## Review Error Messages Page

Use the Review Error Messages page (WCB\_INJ\_ERR\_RESP) to review error messages received from the WCB.

Navigation:

**Workforce Monitoring > Health and Safety > WCB Web Services CAN > Monitor Web Services > Review Error Messages**

This page displays any business logic error messages returned by the WCB. These types of errors are usually data entry errors and easily rectified.

**Reviewing Non-Business Logic Errors**

The WCB Web Service Administrator in your organization needs to review the more technical errors that are not a result of bad business logic. To review these errors, go to the Synchronous Services page (PeopleTools, Integration Broker, Service Operations Monitor, Monitoring, Synchronous Services) and enter the name of the service operation on which you want to run a query. You can view additional details for an error by opening the errorlog.html and msglog.html files, which are located in the <PIA\_HOME>\webserv\<database name>\applications\peoplesoft\PSIGW directory.

**Request Submission Status Page**

Use the Request Submission Status page (WCB\_SUB\_STAT) to request submission status.

Navigation:

**Workforce Monitoring > Health and Safety > WCB Web Services CAN > Monitor Web Services > Request Submission Status**

This example illustrates the fields and controls on the Request Submission Status page. You can find definitions for the fields and controls later on this page.

**Request Submission Status**

Request Submission Status

Submission Details

1-1 of 1

|   | *Incident Number     | Transaction Identifier | Date Transmitted | View Submission Status |                                     |  |
|---|----------------------|------------------------|------------------|------------------------|-------------------------------------|--|
| 1 | <input type="text"/> |                        |                  | View Submission Status | <div><div>+</div><div>-</div></div> |  |

Use this page to request the current submission status of an incident. WorkSafeBC updates the submission status code of an incident as the state of the claim changes.

| Field or Control          | Description                                                                                                          |
|---------------------------|----------------------------------------------------------------------------------------------------------------------|
| Request Submission Status | Click to retrieve the submission status of the selected incidents.                                                   |
| Incident Number           | Enter the unique identifying number of the incident for which you want to review the status.                         |
| Transaction Identifier    | Displays the unique identifier returned by the WCB as part of the response to a successfully validated transmission. |

| <b>Field or Control</b>       | <b>Description</b>                                                             |
|-------------------------------|--------------------------------------------------------------------------------|
| <b>View Submission Status</b> | Click to open the Incident Submission Status page for the associated incident. |

**Note:** Your organization must be live on the production URL to receive responses to submission status requests.

## Review Submission Status Page

Use the Review Submission Status page (WCB\_INC\_SUB\_STAT) to review the submission status of an injury report.

Navigation:

**Workforce Monitoring > Health and Safety > WCB Web Services CAN > Monitor Web Services > Review Submission Status**

This page displays the submission Status Code and Status Message associated with the incident. There are four valid submission status codes that the WCB can return in response to a reported incident:

| <b>Submission Status Code</b> | <b>Submission Status Message</b> | <b>Description</b>                                                                                      |
|-------------------------------|----------------------------------|---------------------------------------------------------------------------------------------------------|
| CNP                           | Submission Not Processed Yet     | The submission currently resides in the WCB interim repository and is awaiting processing.              |
| CAC                           | Submission Was Accepted          | The submission is successfully stored in the WCB Accident Registration System.                          |
| CNW                           | Submission Has No Workers        | The submission has no workers and therefore no claim numbers.                                           |
| CNF                           | Submission Not Found             | The submission could not be found in the interim repository or in the WCB Accident Registration System. |

In addition, for each **Empl ID** and **Claim Number**, this page displays the **Claim Status Code** and **Claim Status Message**. There are nine valid claim status codes that the WCB can return for each claim:

| <b>Claim Status Code</b> | <b>Claim Status Message</b>                        | <b>Description</b>                                                                                                                          |
|--------------------------|----------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------|
| AC                       | This claim has been accepted.                      | The claim has been accepted.                                                                                                                |
| AI                       | We require more information to process this claim. | The claim has been accepted for investigative purposes only. Only health care costs are payable. This is not a final decision on the claim. |

| <b><i>Claim Status Code</i></b> | <b><i>Claim Status Message</i></b>                         | <b><i>Description</i></b>                                                                                               |
|---------------------------------|------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------|
| AN                              | This claim has been accepted.                              | The claim has been accepted on an interim basis. Only wage loss costs are payable. This is not a final decision.        |
| DI                              | This claim has not been accepted.                          | This claim has been disallowed.                                                                                         |
| PE                              | We require more information to process this claim.         | The claim is in a pending state as we have not made a claim decision yet.                                               |
| SU                              | We require more information to process this claim.         | The claim has been suspended as we did not have all the evidence we required to make a claim decision.                  |
| HC                              | This claim has been accepted for health care only.         | The claim has been accepted for the payment of health care benefits only.                                               |
| IN                              | This claim has been registered but needs more information. | The claim has been recorded for information purposes only. There was no medical attention sought or time loss involved. |
| RE                              | This claim has not been accepted.                          | The claim has been rejected. The claim does not meet the requirements of the Workers Compensation Act.                  |

## Review Success Messages Page

Use the Review Success Messages page (WCB\_INJ\_RPT\_RESP) to review success messages received from the WCB.

Navigation:

**Workforce Monitoring > Health and Safety > WCB Web Services CAN > Monitor Web Services > Review Success Messages**

This page displays success messages returned by the WCB.

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

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## Understanding Incident, Injury, and Illness Data for German Employers

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

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

### Reports for Germany

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

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

### Related Links

“Monitor Health and Safety Reports” (Application Fundamentals)

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## Reviewing German Employee Checklist Data

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

## Page Used to Update Medical Exam Information

| <i>Page Name</i>               | <i>Definition Name</i> | <i>Usage</i>                                          |
|--------------------------------|------------------------|-------------------------------------------------------|
| <u>Employee Checklist Page</u> | HS_EMPL_MEDCHK_GER     | View and update medical examination dates and status. |

## Prerequisites

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

Before the organization's physician views and updates the status and date of medical examinations using the Employee Checklist page, create medical checklists for employees using the Checklist table, Checklist Item table, and Employee Checklist pages.

In Workforce Administration, the Employee Checklist page appears with the **Checklist Date**, **Checklist**, **Responsible ID**, **Comments**, **Checklist Sequence**, and **Checklist Item** fields. Use these fields to configure checklists for employees.

See “Understanding Checklists” (PeopleSoft Human Resources Administer Workforce).

## Employee Checklist Page

Use the Employee Checklist page (HS\_EMPL\_MEDCHK\_GER) to view and update medical examination dates and status.

Navigation:

**Workforce Monitoring > Health and Safety > Details DEU > Employee Checklist**

This example illustrates the fields and controls on the Employee Checklist page. You can find definitions for the fields and controls later on this page.

**Employee Checklist**

Marcus Eli-Ben-Amar-Dea Employee Empl ID KDG015 Empl Record 0

**Checklist Description** [Search] 1 of 1 [View All]

Checklist Date 05/27/2020 Checklist [Add] [Remove]

Responsible ID

Comment [Text Field]

**Checklist**

| Sequence | Item | Description | *Briefing Status     | *Status Date                         |
|----------|------|-------------|----------------------|--------------------------------------|
|          |      |             | Initiated [Dropdown] | 05/27/2020 [Calendar] [Add] [Remove] |

1-1 of 1 [View All]

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



| <b>Field or Control</b> | <b>Description</b>                                                                                                                                   |
|-------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Briefing Status</b>  | Update the exam status by selecting from the list of available options: <i>Completed</i> , <i>Initiated</i> , <i>Notified</i> , or <i>Received</i> . |

## Tracking Illnesses for German Employees

This section discusses how to track illnesses for German employees.

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

### Pages Used to Track Illnesses

| <b>Page Name</b>                                 | <b>Definition Name</b> | <b>Usage</b>                                                                            |
|--------------------------------------------------|------------------------|-----------------------------------------------------------------------------------------|
| <u><a href="#">Illness Profile Page</a></u>      | HS_ILLNESS1_GER        | Establish an illness number and track details about an employee's illnesses.            |
| <u><a href="#">Job Details Page</a></u>          | HS_ILLNESS2_GER        | Describe employee circumstances.                                                        |
| <u><a href="#">Job-Related Cause Page</a></u>    | HS_ILLNESS3_GER        | Enter information about the job-related cause for each of the individual's illnesses.   |
| <u><a href="#">Payment/Work Page</a></u>         | HS_ILLNESS4_GER        | Enter data about employee compensation and insurance related to an illness.             |
| <u><a href="#">Medical Details Page</a></u>      | HS_ILLNESS5_GER        | Enter information about the attending doctor, hospital, medical diagnoses, and autopsy. |
| <u><a href="#">Corrective Actions Page</a></u>   | HS_ILLNESS6_GER        | Enter the causes and corrective actions for occupational illnesses.                     |
| <u><a href="#">Preventative Actions Page</a></u> | HS_ILLNESS7_GER        | Enter the causes and preventative actions for occupational illnesses.                   |

### Illness Profile Page

Use the Illness Profile page (HS\_ILLNESS1\_GER) to establish an illness number and track details about an employee's illnesses.

Navigation:

**Workforce Monitoring > Health and Safety > Details DEU > Illness Tracking > Illness Profile**

This example illustrates the fields and controls on the Illness Profile page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Illness Profile' page for employee Marcus Eli-Ben-Amar-Dea (Empl ID KDG015). The page has tabs for 'Illness Profile', 'Job Details', 'Job-Related Cause', 'Payment/Work', and 'Medical Details'. The 'Illness Profile' tab is active. The form contains the following fields and controls:

- Illness Number:** Text input with value '1001' and a '+' button.
- \*Regulatory Region:** Text input with value 'DEU' and a search icon.
- Case Officer ID:** Text input with a search icon.
- Occ Illness:** Text input with a search icon.
- Disease Class:** A checkbox labeled 'Incident Related'.
- Incident Number:** Text input.
- Illness Start Date:** Text input with a calendar icon.
- Result:** Text input with a dropdown arrow.
- Symptoms:** Text input with value 'Coughing, muscle pain, chills'.
- Checkup Results:** Text input with value 'Flu' and a search icon.

At the bottom of the form, it says '147 characters remaining'.

| Field or Control         | Description                                                                                                                                                                                                                                                                                                                                                                                                                           |
|--------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Illness Number</b>    | <p>You may either enter an illness number or let the system assign one when you save.</p> <hr/> <p><b>Note:</b> To prevent having two sets of numbers and to avoid confusion, PeopleSoft recommends that you either always enter the illness number or always let the system assign numbers automatically.</p> <hr/> <p>If an individual has more than one illness, then insert additional data rows to add additional illnesses.</p> |
| <b>Regulatory Region</b> | Select the regulatory region.                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>Case Officer ID</b>   | <p>Select a case officer ID, which is the employee identification number of a person assigned as a case officer of the type <i>Company Physician</i> for this individual's setID and location.</p> <p>Case officer information is set up on the Case Officer Table DEU and specified on the Employee page. Case officers are assigned to employees on the Case Officer Assignment page.</p>                                           |

| <b>Field or Control</b>                   | <b>Description</b>                                                                                                                                                                                                                                                                          |
|-------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Occ Illness</b> (occupational illness) | Select an occupational illness code; these values come from the Occupational Illness table.                                                                                                                                                                                                 |
| <b>Disease Class</b>                      | The disease class that is associated with the occupational illness appears in this field. Disease class values come from the Disease Class DEU component. Use the values for occupational illnesses and disease classes that are defined by the employer's liability insurance association. |
| <b>Incident Related</b>                   | Select this check box to indicate that the illness is incident related.                                                                                                                                                                                                                     |
| <b>Incident Number</b>                    | If you select the <b>Incident Related</b> check box, this field is available for entry. Define incident numbers using the Incident Details component.                                                                                                                                       |
| <b>Illness Start Date</b>                 | Enter the illness start date.                                                                                                                                                                                                                                                               |
| <b>Result</b>                             | Select a value from the list of available options: <i>Not Applicable</i> , <i>Terminate</i> , and <i>Transfer</i> .                                                                                                                                                                         |
| <b>Symptoms</b>                           | Enter a brief description of the illness.                                                                                                                                                                                                                                                   |
| <b>Checkup Results</b>                    | Enter exam results.                                                                                                                                                                                                                                                                         |

## Job Details Page

Use the Job Details page (HS\_ILLNESS2\_GER) to describe employee circumstances.

Navigation:

**Workforce Monitoring > Health and Safety > Details DEU > Illness Tracking > Job Details**

This example illustrates the fields and controls on the Job Details page. You can find definitions for the fields and controls later on this page.

|                 |                    |                   |              |                 |   |
|-----------------|--------------------|-------------------|--------------|-----------------|---|
| Illness Profile | <b>Job Details</b> | Job-Related Cause | Payment/Work | Medical Details | > |
|-----------------|--------------------|-------------------|--------------|-----------------|---|

|               |            |                         |             |   |
|---------------|------------|-------------------------|-------------|---|
| Empl ID       | KDG015     | Marcus Eli-Ben-Amar-Dea | Empl Record | 0 |
| Date of Birth | 11/01/1984 | Date of Death           | Gender      | M |

|                 |                                                                      |
|-----------------|----------------------------------------------------------------------|
| <b>Job Data</b> | <input type="text"/>            << < 1 of 1 > >>            View All |
|-----------------|----------------------------------------------------------------------|

|                |      |                                                                   |
|----------------|------|-------------------------------------------------------------------|
| Illness Number | 1001 | <input type="button" value="+"/> <input type="button" value="-"/> |
|----------------|------|-------------------------------------------------------------------|

|                          |                        |
|--------------------------|------------------------|
| <b>Employee Job Data</b> |                        |
| Dept ID                  | 21600 Sales & Services |
| Job Code                 | 750000 Recruiter       |
| Terminated               |                        |

☐ Owner Partner  
☐ Partner  
☐ Incompetent  
☐ Relation

The employee's data from the Personal Data component appears on this page if the individual is an employee. If the person is a non-employee the data comes from the Non-Employee Details - Personal Details component.

| <i><b>Field or Control</b></i> | <i><b>Description</b></i>                                                                                                                                                                                                                                                                                   |
|--------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Illness Number</b>          | You can insert a new row to add information for another illness. Enter the illness number on the Illness Tracking - Illness Profile page.                                                                                                                                                                   |
| <b>Current Job</b>             | If the individual is a non-employee, enter a brief description of the current job.                                                                                                                                                                                                                          |
| <b>Owner Partner</b>           | Select this check box, if appropriate; <b>Partner</b> and <b>Relation</b> check boxes then become unavailable for data entry.                                                                                                                                                                               |
| <b>Partner</b>                 | Select this check box, if appropriate; <b>Owner Partner</b> and <b>Relation</b> check boxes then become unavailable for data entry.                                                                                                                                                                         |
| <b>Incompetent</b>             | Select this check box, if appropriate.                                                                                                                                                                                                                                                                      |
| <b>Relation</b>                | <p>Select this check box, if appropriate; <b>Owner Partner</b> and <b>Partner</b> check boxes then become unavailable for data entry.</p> <p>When you select the <b>Relation</b> check box, the associated relationship field appears. Specify the person's family relationship by selecting an option.</p> |

Job-Related Cause Page

Use the Job-Related Cause page (HS\_ILLNESS3\_GER) to enter information about the job-related cause for each of the individual's illnesses.

Navigation:

Workforce Monitoring > Health and Safety > Details DEU > Illness Tracking > Job-Related Cause

This example illustrates the fields and controls on the Job-Related Cause page. You can find definitions for the fields and controls later on this page.

Illness ProfileJob DetailsJob-Related CausePayment/WorkMedical Details

Empl IDKDG015Marcus Eli-Ben-Amar-DeaEmpl Record0

Job-Related Cause

1 of 1View All

Illness Number1001

☐ Use Current Job Details

Job Code

FromTo

Current Job

Work Responsible

Work Dangers

Comment

+−

| Field or Control                                   | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|----------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Use Current Job Details, Job Code, and Current Job | <p>If the individual is an employee and you select the <b>Use Current Job Details</b> check box, the employee's most current job data appears in the <b>Job Code</b> and <b>Current Job</b> fields. These fields are then unavailable for data entry. If the individual is an employee and you do not select the <b>Use Current Job Details</b> check box, then you must enter the <b>Current Job</b> information directly into the field.</p> <p>For non-employees, the <b>Use Current Job Details</b> check box and <b>Job Code</b> field are unavailable for data entry. You can enter information directly into the <b>Current Job</b> field.</p> |
| From and To                                        | Enter the dates for the individual's job.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |

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| <b>Field or Control</b>                  | <b>Description</b>                                                                          |
|------------------------------------------|---------------------------------------------------------------------------------------------|
| <b>Work Responsible and Work Dangers</b> | Provide more information about the activity and associated hazards that caused the illness. |

## Payment/Work Page

Use the Payment/Work page (HS\_ILLNESS4\_GER) to enter data about employee compensation and insurance related to an illness.

Navigation:

**Workforce Monitoring > Health and Safety > Details DEU > Illness Tracking > Payment/Work**

This example illustrates the fields and controls on the Payment/Work page. You can find definitions for the fields and controls later on this page.

## Payments

| <b>Field or Control</b>                 | <b>Description</b>                                                                                                                                                                                 |
|-----------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Payments Continue and Until Date</b> | If the employee has the right to collect compensation payments, select the <b>Payments Continue</b> check box and indicate when the payments are scheduled to stop in the <b>Until Date</b> field. |

## Work

| <i><b>Field or Control</b></i> | <i><b>Description</b></i>                                                                                                              |
|--------------------------------|----------------------------------------------------------------------------------------------------------------------------------------|
| <b>Work After Start</b>        | Select if the employee has resumed working after an illness.                                                                           |
| <b>Start Date</b>              | If you selected the <b>Work After Start</b> check box, enter the date that the employee resumed work.                                  |
| <b>Work Stop and Stop Date</b> | Indicate when the employee stopped work by selecting a value from the list of available options and then enter the corresponding date. |
| <b>Patient's Residence</b>     | Identify the residence where the individual is convalescing.                                                                           |

## Medical Details Page

Use the Medical Details page (HS\_ILLNESS5\_GER) to enter information about the attending doctor, hospital, medical diagnoses, and autopsy.

Navigation:

**Workforce Monitoring > Health and Safety > Details DEU > Illness Tracking > Medical Details**

This example illustrates the fields and controls on the Medical Details page. You can find definitions for the fields and controls later on this page.

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

Empl ID KDG015
Marcus Eli-Ben-Amar-Dea
Empl Record 0

**Physician/Medical Details**
1 of 1
View All

Illness Number 1001
+ -

**Autopsy**
☐ Autopsy
Date
Physician
☐ Fatality
Result

**Physician/Hospital Information**
1 of 1
View All

\*Type of Health Care
Physician ID
Name
Medical Facility
Name
Phone
Edit Address

**Medical Diagnoses**
1-1 of 1
View All

|   | *Diagnosis |  |  |  |
|---|------------|--|--|--|
| 1 |            |  |  |  |

## Autopsy

| Field or Control | Description                                                                            |
|------------------|----------------------------------------------------------------------------------------|
| <b>Autopsy</b>   | Select this check box if an autopsy is performed.                                      |
| <b>Fatality</b>  | If the individual died as a result of the occupational illness, select this check box. |
| <b>Date</b>      | Enter the autopsy date.                                                                |
| <b>Physician</b> | Enter the name of the physician who performed the autopsy.                             |
| <b>Result</b>    | Enter the autopsy result.                                                              |



## Physician/Hospital Information

| <i>Field or Control</i>    | <i>Description</i>                                                                                                                                                                                                                                                                                                                       |
|----------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Type of Health Care</b> | If the individual received health care, enter the type of health care from the list of available options.                                                                                                                                                                                                                                |
| <b>Physician ID</b>        | Select a physician ID (non-employee ID). This data comes from the Physicians table. When you select a physician, the physician's name appears.                                                                                                                                                                                           |
| <b>Medical Facility</b>    | Select a medical facility code from the list of available options. This data comes from the Medical Facilities table. When you select a medical facility, the facility name appears.                                                                                                                                                     |
| <b>Edit Address</b>        | Click the Edit Address links to access the Injury Details - Medical Details Address page. The default address for the medical facility comes from the Medical Facilities Table page (HS_MEDICAL_FAC). You can edit the medical facility address information but it will not update the information on the Medical Facilities Table page. |

## Medical Diagnoses

| <i>Field or Control</i> | <i>Description</i>                                                                                                                                                                                                                                       |
|-------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Diagnosis</b>        | For each medical diagnosis provided by a physician, select a diagnosis code from the list of available options. These values come from the Diagnosis table. If there are multiple medical diagnoses, insert a data row to add a diagnosis code for each. |

## Corrective Actions Page

Use the Corrective Actions page (HS\_ILLNESS6\_GER) to enter the causes and corrective actions for occupational illnesses.

Navigation:

**Workforce Monitoring > Health and Safety > Details DEU > Illness Tracking > Corrective Actions**

This example illustrates the fields and controls on the Corrective Actions page. You can find definitions for the fields and controls later on this page.

Illness ProfileJob DetailsJob-Related CausePayment/WorkMedical DetailsCorrective Actions

Empl ID KDG015    Marcus Eli-Ben-Amar-Dea    Empl Record 0

Causes/Corrective Actions

Illness Number 1001

Causes

Hazard Cause

Corrective Actions

Action Sequence 1

Corrective Actions

Responsible ID

\*Status Recommended

Action

Completion Date

Estimated Actual

Causes

| Field or Control | Description                                                                                                                                                                                                                                               |
|------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Hazard and Cause | You must select a hazard code from the list of available options. Values come from the Hazardous Materials/ Conditions table and are based on the person's regulatory region and setID. The <b>Cause</b> field is read only when you enter a hazard code. |

Corrective Actions

| Field or Control | Description                                                                             |
|------------------|-----------------------------------------------------------------------------------------|
| Action Sequence  | The system automatically assigns this field a number for each data row that you insert. |

| <b>Field or Control</b>   | <b>Description</b>                                                                                                                      |
|---------------------------|-----------------------------------------------------------------------------------------------------------------------------------------|
| <b>Corrective Actions</b> | Select a code from the list of available options. These values come from the Correct. Actions Table DEU (corrective actions table DEU). |
| <b>Responsible ID</b>     | Select or enter the ID of the employee who is responsible for following through on the action.                                          |
| <b>Action</b>             | Enter a description for the corrective action.                                                                                          |

### Completion Date

| <b>Field or Control</b>     | <b>Description</b>                                                                           |
|-----------------------------|----------------------------------------------------------------------------------------------|
| <b>Estimated and Actual</b> | When you know them, enter the estimated or actual completion date for the corrective action. |

## Preventative Actions Page

Use the Preventative Actions page (HS\_ILLNESS7\_GER) to enter the causes and preventative actions for occupational illnesses.

Navigation:

**Workforce Monitoring > Health and Safety > Details DEU > Illness Tracking > Preventative Actions**

This page is identical to the Corrective Actions page except that Corrective Actions field is **Prevent Act**, where the list of available options comes from the Preventative Actions DEU table.

---

## Entering Case Officer Information for German Employees

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

### Page Used to Assign Case Officers

| <b>Page Name</b>                    | <b>Definition Name</b> | <b>Usage</b>                                                                                                          |
|-------------------------------------|------------------------|-----------------------------------------------------------------------------------------------------------------------|
| <u>Case Officer Assignment Page</u> | HS_JOB_DATA_GER        | Assign case officers from a particular setID and location that are responsible for an injured or ill employee's case. |

## Case Officer Assignment Page

Use the Case Officer Assignment page (HS\_JOB\_DATA\_GER) to assign case officers from a particular setID and location that are responsible for an injured or ill employee's case.

Navigation:

**Workforce Monitoring > Health and Safety > Details DEU > Case Officer Assignment**

This example illustrates the fields and controls on the Case Officer Assignment page. You can find definitions for the fields and controls later on this page.

**Case Officer Assignment**

Marcus Eli-Ben-Amar-Dea Employee Empl ID KDG015 Empl Record 0

**Details** 1 of 2 View All

Effective Date 02/01/2001 Effective Sequence 0 + -

**Case Officers** 1-1 of 1 View All

| Officer Type         | Case Officer ID      | Form Officer             |
|----------------------|----------------------|--------------------------|
| <input type="text"/> | <input type="text"/> | <input type="checkbox"/> |

### Case Officers

| Field or Control       | Description                                                                                                                                                                                                                                                                                                                                                                                                          |
|------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Officer Type</b>    | Select a type for the case officer from the list of available options.                                                                                                                                                                                                                                                                                                                                               |
| <b>Case Officer ID</b> | <p>You can select from the list of case officers who are assigned to this employee's setID and location in the Case Officer Table DEU.</p> <hr/> <p><b>Note:</b> Employees in an organization are designated as case officers on the Employee page. These case officers are classified by type and associated with a particular setID and location in the Case Officer Table DEU page.</p> <hr/>                     |
| <b>Form Officer</b>    | <p>If the officer type is <i>Company Physician</i> and you select the <b>Form Officer</b> check box, then this case officer is used in the German Illness report for illnesses.</p> <p>If the officer type is <i>Health and Safety Specialist</i> and you select the <b>Form Officer</b> check box, then this case officer is used in the German Accident Report for incidents that are injuries and fatalities.</p> |

---

## Collecting Data for German Reports

This section lists the page used to collect data for generating the Illness report.

### Page Used to Collect Data for the Illness Report

| <b><i>Page Name</i></b> | <b><i>Definition Name</i></b> | <b><i>Usage</i></b>                                                                                                                                                                                                                                                            |
|-------------------------|-------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Illness Report          | RUNCTL_OHS504GR               | <p>Collect illness data for generating the Illness report (OHS004GR).</p> <p>Before you can run the Illness report (OHS004GR), you must run the Collect Illness Report Data SQR process (OHS504GR). Both of these processes are available through the Illness Report page.</p> |



# Working with Health and Safety Using Fluid

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## Understanding Fluid Health and Safety

Monitor Health and Safety streamlines setup activities for administrators and delivers self-service transactions for employees in Fluid.

Administrators can:

- Access various setup and administrative pages from a single location on the Workforce Administrator home page using Fluid tiles and navigation collections.

See [Managing Health and Safety Tasks as Administrators Using Fluid](#).

- View and analyze incident, vaccinations, and test result data using PeopleSoft Insights dashboards.

See [Viewing Incident Insights](#), [Viewing Vaccination Insights](#), and [Viewing Test Insights](#).

- Review and approve incidents, vaccinations, and test results reported by employees.

See [Approving Incidents Using Fluid Approvals](#), [Approving Vaccinations Using Fluid Approvals](#), and [Approving Test Results Using Fluid Approvals](#).

Employees can:

- Report and track their incidents.

The self-guided process for logging incident and injury (or illness) information is controlled by the activity guide template that is configured for the associated incident type.

See [Reporting Incidents as Employees](#).

- Report and track their vaccinations.

See [Reporting Vaccinations as Employees](#).

- Report and track their test results.

See [Reporting Test Results as Employees](#).

- Report and track their allergy information.

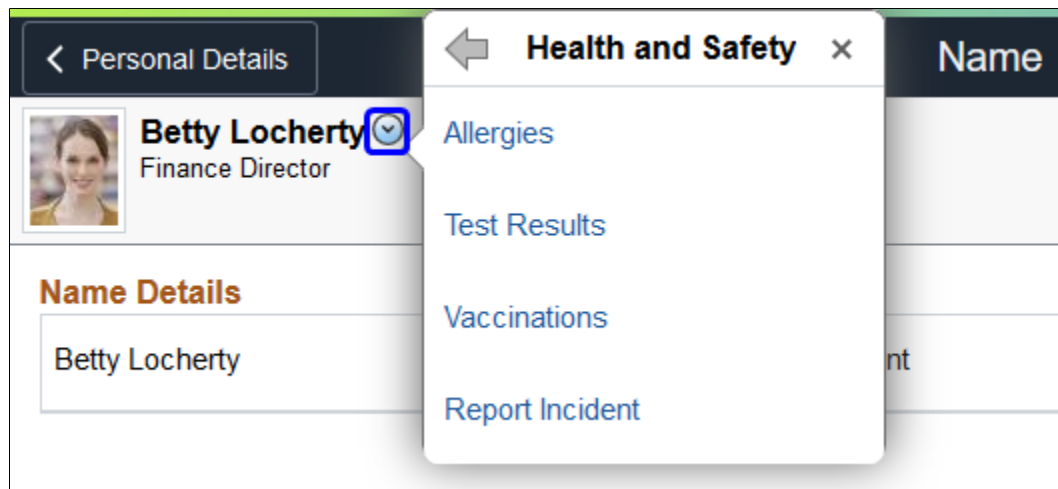
See [Reporting Allergies as Employees](#).

Video: [Image Highlights, PeopleSoft HCM Update Image 36: Health and Safety Modernization](#)

## Related Actions

Health and Safety transactions are available as related actions for employees in the self-service transactions that are accessible from the “Personal Details Tile” (PeopleSoft eProfile), as well as in the Health and Safety transactions themselves.

This example illustrates the Health and Safety related actions that the employee can access from a self-service transaction.



## Approval and Notification

Incidents, vaccinations, and test results can be configured to go through the approval process that is managed by the Approval Workflow Engine (AWE). Based on the setup in AWE, Health and Safety administrators and employees may receive email notifications, push notifications, or both, when any of these events occurs:

- A transaction is submitted for review or approval.
- A transaction is pushed back or resubmitted for approval.
- A transaction is approved.
- A transaction is denied, which is applicable to vaccinations and test results only.
- (For administrator) Information of an incident, vaccination, or test results cannot be updated in the database automatically using Component Interface.

(Incidents only) AWE approval is configurable by incident type. If approval is not enabled for an incident type, notifications are delivered (or not delivered) to recipients based on the notification setup for that incident type.

(Vaccinations and test results only) AWE approval is configurable by immunization (vaccine) and test. If approval is not enabled, no notifications will be delivered to recipients.



---

**Note:** Oracle PeopleSoft delivers Notification Composer Framework to manage the setup and administration of all notifications in one central location.

Once you have adopted the Notification Composer feature, you must use it to create new notifications and manage your existing notifications.

Notifications delivered with HCM Image 47 or later must use Notification Composer.

For more information about Notification Composer Framework, see “Understanding Notification Composer” (Enterprise Components).

---

## Activity Guide

PeopleSoft HCM delivers a default activity guide template for reporting incidents in Self-Service. Update the delivered template or create new ones by cloning to suit your business needs, and reference the template to use for each supported incident type in the incident type setup.

## Related Links

[Configure Incident Types Page](#)

“Configuring Approval Transactions” (Application Fundamentals)

“Managing Activity Guide Templates” (Enterprise Components)

---

# Managing Health and Safety Tasks as Administrators Using Fluid

This topic lists the pages that Health and Safety administrators can access from a single location on the Workforce Administrator home page to perform administrative transactions.

For general information about fluid pages in PeopleSoft HCM, see “Understanding PeopleSoft Fluid User Interface Homepages” (Application Fundamentals).

## Pages Used to Manage Health and Safety Tasks as Administrators Using Fluid

| <b>Component or Page Name</b>                      | <b>Definition Name</b>      | <b>Usage</b>                                                                                                                       |
|----------------------------------------------------|-----------------------------|------------------------------------------------------------------------------------------------------------------------------------|
| <a href="#">Manage Health and Safety Tile</a>      | HC_HS_DASHBOARD_FL_GBL_LINK | Access the Manage Health and Safety dashboard for a collection of administrative components or transactions in a central location. |
| <a href="#">Manage Health and Safety Dashboard</a> | HC_HS_DASHBOARD_FL_GBL      | Access tiles for setting up, managing and reporting health and safety information for employees.                                   |

## Prerequisites

Administrators must be members of the *Health and Safety ADM Fluid* (Health and Safety ADM Fluid) role to access the Manage Health and Safety tile and pages.

---

**Note:** Designate as least one individual to be the Fluid Health and Safety administrator in your organization to receive notifications and process incident approvals.

If your organization supports different regulatory regions, you need to assign an administrator to each of them. In addition to the *Health and Safety ADM Fluid* role, this individual also needs to belong in the same regulatory region that they support.

---

## Manage Health and Safety Tile

Administrators use the Manage Health and Safety tile (HC\_HS\_DASHBOARD\_FL\_GBL\_LINK) to access the Manage Health and Safety dashboard for a collection of administrative components or transactions in a central location.

Navigation:

The Manage Health and Safety tile is delivered as part of the Workforce Administrator home page, but the location can change if you change the delivered home pages or if administrators personalize their home pages.

This example illustrates the Manage Health and Safety tile.



Click the Manage Health and Safety tile to access the [Manage Health and Safety Dashboard](#), which displays tiles for managing, reporting, and configuring Health and Safety components or transactions, as well as visualizing analytics for incidents, vaccinations, and tests.

Video: [PeopleSoft Employee Health and Safety](#)

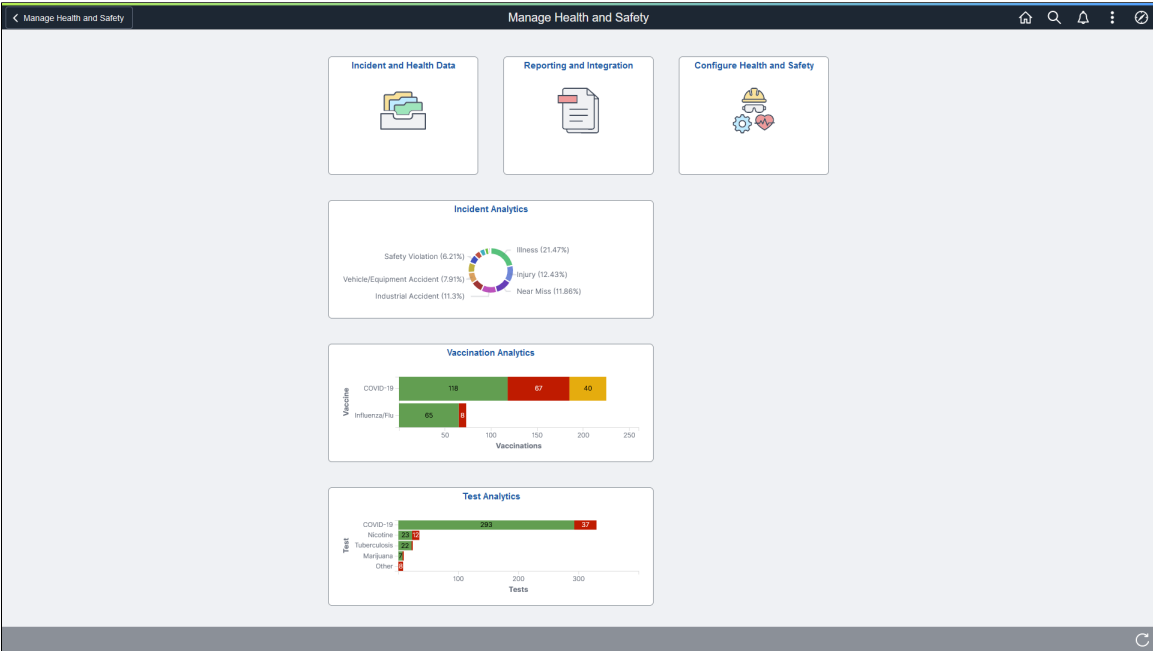
## Manage Health and Safety Dashboard

Use the Manage Health and Safety dashboard (HC\_HS\_DASHBOARD\_FL\_GBL) to access tiles for setting up, managing and reporting health and safety information for employees, and visualizing analytics.

Navigation:

Click the Manage Health and Safety tile.

This example illustrates the Manage Health and Safety dashboard.



The Manage Health and Safety dashboard provides administrators quick access to Health and Safety components from one location.

The dashboard lists the components collected under these tiles, and can be personalized as needed:

| Tile Name                                        | Usage                                                                                                                                                                                                                                                         |
|--------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <a href="#">Incident and Health Data Tile</a>    | Access the Incident and Health Data navigation collection to obtain incident information, verify people connected to incidents, record exam results, and (DEU) track incident details.                                                                        |
| <a href="#">Reporting and Integration Tile</a>   | Access the Reporting and Integration navigation collection to gather report data and run Health and Safety reports for supported country extensions.                                                                                                          |
| <a href="#">Configure Health and Safety Tile</a> | Access the Configure Health and Safety navigation collection to define setup data such as accident or injury information, hazardous environments, medical services, and work restriction codes. Specify configuration settings for use in Fluid Self-Service. |
| <a href="#">Incident Analytics Tile</a>          | Access the Incident Analytics dashboard to view and analyze incident data using visualizations.                                                                                                                                                               |
| <a href="#">Vaccination Analytics Tile</a>       | Access the Vaccination Analytics dashboard to view and analyze vaccination data using visualizations.                                                                                                                                                         |

| <b>Tile Name</b>                    | <b>Usage</b>                                                                                    |
|-------------------------------------|-------------------------------------------------------------------------------------------------|
| <a href="#">Test Analytics Tile</a> | Access the Test Analytics dashboard to view and analyze medical test data using visualizations. |

## Related Links

[Viewing Incident Insights](#)

[Viewing Vaccination Insights](#)

[Viewing Test Insights](#)

[Approving Incidents Using Fluid Approvals](#)

[Approving Vaccinations Using Fluid Approvals](#)

[Approving Test Results Using Fluid Approvals](#)

---

## Managing Incidents and Health Data as Administrators Using Fluid

This topic lists the pages that Health and Safety administrators can access from a single location on the Workforce Administrator home page to manage incidents and incident-related information, such as injuries, claims, people connected to incidents, and exam results.

## Pages Used to Manage Incidents and Health Data as Administrators Using Fluid

| <b>Component or Page Name</b>                    | <b>Definition Name</b>                                       | <b>Usage</b>                                                                                                       |
|--------------------------------------------------|--------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------|
| <a href="#">Incident and Health Data Tile</a>    | HC_HS_INCIDENTS_FL_GBL                                       | Access a collection of administrative components for incident management.                                          |
| Incident Details (component)                     | HS_INCIDENT (definition name of the first component page)    | Enter health and safety incident details.<br><br>See <a href="#">Entering Health and Safety Incident Details</a> . |
| <a href="#">Vehicles/Equipment Involved Page</a> | HS_INC_VEHICLE                                               | Enter the specifics of incidents involving vehicle or equipment accidents.                                         |
| Injury Details (component)                       | HS_INJ_NOTIFY (definition name of the first component page)  | Enter injury details.<br><br>See <a href="#">Entering Injury Details</a> .                                         |
| Open Claim (component)                           | HS_CLAIM_MGMT1 (definition name of the first component page) | Enter and manage claims.<br><br>See <a href="#">Managing Claims</a> .                                              |

| <b>Component or Page Name</b>                       | <b>Definition Name</b>                                           | <b>Usage</b>                                                                                                                                                                                     |
|-----------------------------------------------------|------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Create Employee Rehab Plan (component)              | HS_INJ_REHAB1 (definition name of the first component page)      | Track rehabilitation plans for employees.<br>See <a href="#">Tracking Rehabilitation Plans</a> .                                                                                                 |
| Create Non-Employee Rehab Plan (component)          | HS_INJ_REHAB1 (definition name of the first component page)      | Track rehabilitation plans for non-employees.<br>See <a href="#">Tracking Rehabilitation Plans</a> .                                                                                             |
| Corrective/Preventive Actions (component)           | HS_INC_ACTION_CRCT (definition name of the first component page) | Enter corrective and preventive actions.<br>See <a href="#">Tracking Consequent Actions of Incidents</a> .                                                                                       |
| <a href="#">Review Employee Injury Summary Page</a> | INJURY_SUMMARY                                                   | View a summary of all the injuries that an employee has experienced and related incident data.                                                                                                   |
| Incident Details BRA (component)                    | HS_INCIDENT (definition name of the first component page)        | Enter health and safety incident details.<br>See <a href="#">Entering Health and Safety Incident Details</a> .                                                                                   |
| Injury Details BRA (component)                      | HS_INJ_NOTIFY (definition name of the first component page)      | See <a href="#">Entering Injury Details</a> .                                                                                                                                                    |
| Review Injury Summary BRA Page                      | INJURY_SUM_BRA                                                   | View a summary of all the injuries that an employee has experienced and related incident data for Brazil.<br><br>See <a href="#">Tracking Incident, Injury, and Illness Data by Individual</a> . |
| <a href="#">Vehicles/Equipment Involv MEX Page</a>  | HS_INC_VEHICLE_MEX                                               | Enter the specifics of incidents involving vehicles or equipment.                                                                                                                                |
| <a href="#">Additional Employee Details Page</a>    | HS_PERS_DATA                                                     | Enter extra address information for employees who are involved in health and safety incidents.                                                                                                   |
| <a href="#">Employment Page</a>                     | HS_EMPLOYMENT                                                    | Enter additional employment details for employees in Canadian and United Kingdom operations who are involved in health and safety incidents.                                                     |
| <a href="#">Family Information Page</a>             | HS_FAMILY                                                        | Enter additional family information for employees or for non-employees who are involved in a health and safety incident.                                                                         |

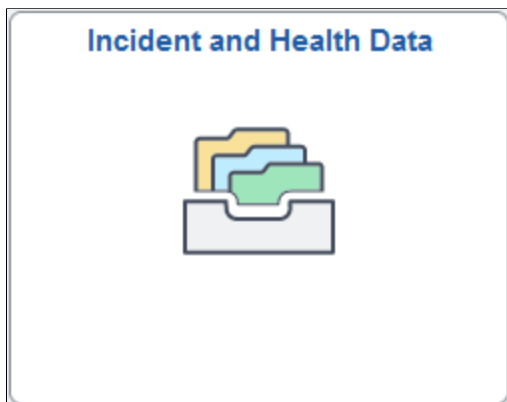
| <b>Component or Page Name</b>            | <b>Definition Name</b>                                          | <b>Usage</b>                                                                                                                                                         |
|------------------------------------------|-----------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Non-Employee (component)                 | HS_NON_EMPL1 (definition name of the first component page)      | Maintain name information for non-employees involved in incidents.<br><br>See <a href="#">Entering Non-Employee Data</a> .                                           |
| Employee Health Card (component)         | GVT_HEALTH_CARD_1 (definition name of the first component page) | Record the employee's physician contact information.<br><br>See <a href="#">Maintaining and Reviewing Employee Health Card Information</a> .                         |
| <a href="#">Health Card Page</a>         | HS_HEALTH_CARD                                                  | Review and update the employee's health information regarding vaccinations, test results, allergies, medications, and illnesses.                                     |
| <a href="#">Vaccine Attachments Page</a> | HS_IMMUN_ATTACH_FL                                              | Add, view, or remove attachments for vaccinations.                                                                                                                   |
| <a href="#">Test Attachments Page</a>    | HS_TEST_ATTACH_FL                                               | Add, view, or remove attachments for test results.                                                                                                                   |
| Audiometric Exam (component)             | HS_EXAM_AUDIO1 (definition name of the first component page)    | Maintain basic appointment and physician contact information, and results for audio exams.<br><br>See <a href="#">Tracking Employee Medical Exam Results</a> .       |
| Eye Exam (component)                     | HS_EXAM_EYE1 (definition name of the first component page)      | Maintain basic appointment and physician contact information, and results for eye exams.<br><br>See <a href="#">Tracking Employee Medical Exam Results</a> .         |
| Physical Exam (component)                | HS_EXAM_PHYSICAL1 (definition name of the first component page) | Maintain basic appointment and physician contact information, and results for physical exams.<br><br>See <a href="#">Tracking Employee Medical Exam Results</a> .    |
| Respiratory Exam (component)             | HS_EXAM_RESPIRE1 (definition name of the first component page)  | Maintain basic appointment and physician contact information, and results for respiratory exams.<br><br>See <a href="#">Tracking Employee Medical Exam Results</a> . |

| <b>Component or Page Name</b>                 | <b>Definition Name</b>                                          | <b>Usage</b>                                                                                                               |
|-----------------------------------------------|-----------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------|
| Drug Test (component)                         | GVT_DRUG_TEST1 (definition name of the first component page)    | Set up physician and test information for a drug test.<br><br>See <a href="#">Tracking Employee Medical Exam Results</a> . |
| Review Health Card Info (component)           | GVT_HEALTH_RVW_1 (definition name of the first component page)  | View employee personal data.<br><br>See <a href="#">Maintaining and Reviewing Employee Health Card Information</a> .       |
| <a href="#">Medical Exam Results BRA Page</a> | MED_EXAM_RSLT_BRA                                               | Review medical exam results.                                                                                               |
| ASO Exam Results BRA (component)              | ASO_EXAM_RSLT_BRA (definition name of the first component page) | Maintain basic ASO exam and physician information.<br><br>See <a href="#">Tracking Employee Medical Exam Results</a> .     |
| <a href="#">Drug Test BRA Page</a>            | EMPL_DRUG_TEST_BRA                                              | Enter worker's drug test information.                                                                                      |
| <a href="#">Coop Society Data Page</a>        | HS_COOP_SOC_GER                                                 | Associate an insurer's industrial hazard code with an employee.                                                            |
| <a href="#">Employee Checklist Page</a>       | HS_EMPL_MEDCHK_GER                                              | View and update medical examination dates and status.                                                                      |
| Illness Tracking (component)                  | HS_ILLNESS1_GER (definition name of the first component page)   | See <a href="#">Tracking Illnesses for German Employees</a> .                                                              |
| <a href="#">Case Officer Assignment Page</a>  | HS_JOB_DATA_GER                                                 | Assign case officers from a particular setID and location that are responsible for an injured or ill employee's case.      |

## Incident and Health Data Tile

Use the Incident and Health Data tile (HC\_HS\_INCIDENTS\_FL\_GBL) to access a collection of administrative components for incident management.

This example illustrates the Incident and Health Data tile.



Click the Incident and Health Data tile to access the Incident and Health Data application start page.

This example illustrates the Incident and Health Data application start page.

A screenshot of the "Incident and Health Data" application interface. The top navigation bar includes a back arrow, "Manage Health and Safety", and the application title "Incident and Health Data". On the right of the bar are icons for home, notifications, and a menu. Below the bar, a left sidebar lists navigation options under "Obtain Incident Information": "Incident Details" (highlighted), "Vehicles/Equipment Involved", "Injury Details", "Open Incident Claim", "Create Employee Rehab Plan", "Create Non-Employee Rehab Plan", "Corrective/Preventive Actions", "Review Employee Injury Summary", "Incident Details BRA", "Injury Details BRA", and "Review Injury Summary BRA". The main content area is titled "Incident Details" and contains instructions: "Enter any information you have and click Search. Leave fields blank for a list of all values." It features buttons for "Find an Existing Value" and "Add a New Value". Below is a "Search Criteria" section with dropdowns for "Incident Number" (set to "begins with") and "Incident Type" (set to "="). At the bottom of the search section are "Search", "Clear", "Basic Search", and "Save Search Criteria" buttons. A second set of "Find an Existing Value" and "Add a New Value" buttons is located at the very bottom of the main content area.

This Incident and Health Data application start page is a navigation collection that enables administrators to access components to create and maintain incidents, claims and rehabilitation plans, verify people that can be involved in incidents, record exam results, and track related details.

The application start page lists the components collected under these categories:

- Obtain Incident Information
- Verify Persons Involved
- Record Medical Exam Results
- Track Details DEU

Rows that display a downward facing arrow are category headers. Select a category row to expand and view the component collection associated with that category.



## Health Card Page

Use the Health Card page (HS\_HEALTH\_CARD) to review and update the employee's health information regarding vaccinations, test results, allergies, medications, and illnesses.

Navigation:

- **Workforce Monitoring > Health and Safety > Record Medical Exam Results > Health Card > Health Card**
- Select *Record Medical Exam Results*, then *Health Card* from the left panel of the Incident and Health Data application start page.

This example illustrates the fields and controls on the Health Card page (1 of 3).

**Health Card**

John Patterson Person ID KU0131

Vaccinations

\*Regulatory Region USA United States

Vaccine Details

Details Manufacturer Location Documentation

| *Vaccine | Description | *Date      | Vaccination Complete                | Next Vaccination Due | Declined                            | Decline Reason    |
|----------|-------------|------------|-------------------------------------|----------------------|-------------------------------------|-------------------|
| K010     | Influenza   | 08/19/2021 | <input checked="" type="checkbox"/> | 08/19/2022           | <input type="checkbox"/>            |                   |
| K014     | Tetanus     | 05/03/2021 | <input checked="" type="checkbox"/> | 05/03/2031           | <input type="checkbox"/>            |                   |
| K015     | Shingles    | 07/27/2021 | <input type="checkbox"/>            |                      | <input checked="" type="checkbox"/> | Allergic Reaction |

This example illustrates the fields and controls on the Health Card page (2 of 3).

**Test Results**

\*Regulatory Region USA United States

Test Details

Details Location Documentation

| *Test | Description | *Date      | Test Result | Test Method |
|-------|-------------|------------|-------------|-------------|
| K005  | Cholesterol | 03/01/2021 | Normal      |             |

Allergies

\*Regulatory Region USA United States

Allergy Details

| *Allergy | Description           | *Date      | Comments           |
|----------|-----------------------|------------|--------------------|
| K003     | Animal Dander         | 07/27/2021 | Dogs and cats only |
| K006     | Peanuts and Tree Nuts | 07/01/2021 |                    |

This example illustrates the fields and controls on the Health Card page (3 of 3).

Medications

1 of 1

View All

\*Regulatory Region

USA

United States

+

-

Medication Details

1-1 of 1

View All

| *Medication | Description | *Date       | Comments |              |              |
|-------------|-------------|-------------|----------|--------------|--------------|
| <div></div> |             | <div></div> |          | <div>+</div> | <div>-</div> |

Illnesses

1 of 1

View All

\*Regulatory Region

USA

United States

+

-

Illness Details

1-1 of 1

View All

| *Illness    | Description | Date        | Comments |              |              |
|-------------|-------------|-------------|----------|--------------|--------------|
| <div></div> |             | <div></div> |          | <div>+</div> | <div>-</div> |

After employees report their vaccination, allergy, or test result information using fluid tiles in Self Service, the administrator can review the approved or recorded information on the Health Card page.

The administrator can add, update or delete employees’ health information from this page as well. Changes will be visible to the employees when they access their health information from the [Vaccinations Tile](#), [Test Results Tile](#), and [Allergies Tile](#) in Self Service.

**Note:** The Health Card page is modeled after the [Health Card 2 Page](#) and is used to store the health information of employees. Both pages share the same records for immunizations (vaccinations), allergies, medications and diseases (illnesses). Therefore, when you report any of this information for an employee, the same information is available on both pages.

Vaccinations

Record any vaccinations the employee has received. Any vaccination information reported by the employee using the Vaccinations tile appears in this section as well, organized in tabs.

| Field or Control | Description                                                                                                                                                                                                                                                                                                                                                                 |
|------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Vaccine and Date | <p>Specify the vaccine that the employee received and the vaccination date. These are required fields. Do not enter duplicate values.</p> <p>When you select a different vaccine, the system clears any existing vaccination, manufacturer and location information for the old vaccine from the row.</p> <p>Vaccines are defined on the Immunization page (IMMUN_TBL).</p> |

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| <b>Field or Control</b>                    | <b>Description</b>                                                                                                                                                                                                                                                                                                                                                                                                    |
|--------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Vaccination Complete</b>                | <p>Select to indicate that the employee is fully vaccinated with the specified vaccine, for example, the row is for a single-dose vaccine, or for the last dose of a multi-dose vaccine.</p> <p>This check box is selected automatically when the condition applies, or can be updated manually.</p>                                                                                                                  |
| <b>Next Vaccination Due</b>                | Specify when the next vaccination (single dose) or vaccination series (multi-dose) is due. The system calculates this date automatically if the vaccination schedule is specified in the vaccine setup.                                                                                                                                                                                                               |
| <b>Declined</b>                            | <p>Select to indicate that the employee declined to take the vaccine. This check box is not editable when the <b>Vaccination Complete</b> check box is selected.</p> <p>When the <b>Declined</b> check box is selected, the system populates the <b>Date</b> field with today's date, makes the <b>Decline Reason</b> field editable, and hides the fields from the <b>Manufacturer</b> and <b>Location</b> tabs.</p> |
| <b>Decline Reason</b>                      | Select the reason the employee declined the vaccine. This field become editable when the <b>Declined</b> check box is selected.                                                                                                                                                                                                                                                                                       |
| <b>Add Attachments or View Attachments</b> | Click to add, view or remove attachments on the <a href="#">Vaccine Attachments Page</a> .                                                                                                                                                                                                                                                                                                                            |

---

**Note:** Refer to [Vaccine Details Page](#) for the descriptions of other fields that appear in this section.

---

## Test Results

Record any test results for the employee. Any test result information reported by the employee using the Test Results tile appears in this section as well, organized in tabs.

| <b>Field or Control</b> | <b>Description</b>                                                                                                                                                                          |
|-------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Test and Date</b>    | <p>Specify the test that the employee took and the date of the test. These are required fields. Do not enter duplicate values.</p> <p>Tests are defined on the Test page (HS_TEST_TBL).</p> |
| <b>Attachments</b>      | Click to add, view or remove attachments on the <a href="#">Test Attachments Page</a> .                                                                                                     |

---

**Note:** Refer to [Test Details Page](#) for the descriptions of other fields that appear in this section.

---

## Allergies

Record any allergies (for example, food, chemicals, and hay fever) that the employee has. Any allergy information reported by the employee using the Allergies tile appears in this section as well.

| <i><b>Field or Control</b></i> | <i><b>Description</b></i>                                                                                                                                                                                             |
|--------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Allergy and Date</b>        | <p>Specify the allergy that the employee has and the date you entered this information. These are required fields. Do not enter duplicate values.</p> <p>Allergies are defined on the Allergy page (ALLERGY_TBL).</p> |

See Also [Add Allergy Page](#).

## Medications

Record any medications that the employee takes.

Medications are defined on the Medication page (MEDCATN\_TBL).

## Illnesses

Record any illnesses that the employee has.

Illnesses are defined on the Occupational Illnesses or Occupational Illnesses page (HS\_OCC\_ILLNESS).

## Vaccine Attachments Page

Use the Vaccine Attachments page (HS\_IMMUN\_ATTACH\_FL) to add, view, or remove attachments for vaccinations.

Navigation:

Click the **Add Attachments** or **View Attachments** link of a vaccination row on the Health Card page.

This example illustrates the fields and controls on the Vaccine Attachments page.

Vaccine Attachments

Save

Vaccine Attachments

Attach any files (for example, immunization records, medical documents, or pictures) that pertain to the vaccination.

▼ Vaccine Details

Employee Name

Christelle Stevenson

KU0020

Regulatory Region

United States

USA

Vaccine

Shingles

K015

Date

07/28/2021

Comments

Attachments

Add Attachment

| Attachments  | Description    | Attached By    | Attached On          |  |
|--------------|----------------|----------------|----------------------|--|
| Vaccine.docx | Vaccine record | Betty Locherty | 08/10/21 11:36:41 AM |  |

Vaccine Details

This section lists the information of the employee's vaccination.

Attachments

| Field or Control                | Description                                                       |
|---------------------------------|-------------------------------------------------------------------|
| Add Attachment                  | Select the button to upload a file for the specified vaccination. |
| Attachments                     | Select to save the uploaded attachment.                           |
| <div></div> <div>(Delete)</div> | Select to remove the attachment uploaded by you.                  |

Test Attachments Page

Use the Test Attachments page (HS\_TEST\_ATTACH\_FL) to add, view, or remove attachments for medical test results.

Navigation:

Click the **Add Attachments** or **View Attachments** link of a test result row on the Health Card page.

This example illustrates the fields and controls on the Test Attachments page.

**Test Attachments** Save

Attach any files (for example, test results, medical documents, or pictures) that pertain to the test taken.

**Test Details**

Employee KU0020 Christelle Stevenson

Regulatory Region USA United States

Test K001 Influenza

Date 08/03/2021

Comments

**Attachments**

Add Attachment

| Attachments | Description | Attached By    | Attached On          |
|-------------|-------------|----------------|----------------------|
| Test.docx   |             | Betty Locherty | 08/10/21 02:40:04 PM |

1 row

## Test Details

This section lists the information of the employee's test results.

## Attachments

| Field or Control                                                                                | Description                                                        |
|-------------------------------------------------------------------------------------------------|--------------------------------------------------------------------|
| Add Attachment                                                                                  | Select the button to upload a file for the specified test results. |
| Attachments                                                                                     | Select to save the uploaded attachment.                            |
| <br>(Delete) | Select to remove the attachment uploaded by you.                   |

## Related Links

[Managing Health and Safety Tasks as Administrators Using Fluid](#)

# Running Health and Safety Reports as Administrators Using Fluid

This topic lists the pages that Health and Safety administrators can access from a single location on the Workforce Administrator home page to run Health and Safety reports.

## Pages Used to Run Health and Safety Reports as Administrators Using Fluid

| <b><i>Component or Page Name</i></b>                                                 | <b><i>Definition Name</i></b> | <b><i>Usage</i></b>                                                                                                                                                                                                                                                                                                                                           |
|--------------------------------------------------------------------------------------|-------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <u>Reporting and Integration Tile</u>                                                | HC_HS_REPORTING_FL_GBL        | <p>Access a collection of administrative components for Health and Safety reporting.</p> <hr/> <p><b>Important!</b> The majority of the Health and Safety reports are documented in “Monitor Health and Safety Reports” (Application Fundamentals). Reports that are not included in that Health and Safety reports topic are listed in this table.</p> <hr/> |
| “Print Delta XML File ESP Page”<br>(PeopleSoft Human Resources Administer Workforce) | XML_RC_ESP                    | Generate XML files to send to insurance companies.                                                                                                                                                                                                                                                                                                            |
| <u>Extract WCB Injury Data CAN Page</u>                                              | RUNCTL_WCB_501                | Populate staging tables with WCB injury data.                                                                                                                                                                                                                                                                                                                 |
| WCB EDI Data CAN Page                                                                | RUNCTL_OHS501BC               | Prepare BC WCB data for file creation.                                                                                                                                                                                                                                                                                                                        |
| Create WCB EDI File CAN Page                                                         | PRCSRUNCNTL                   | Create and send the BC WCB EDI file.                                                                                                                                                                                                                                                                                                                          |
| Accident Data DEU                                                                    | RUNCTL_OHS501GR               | <p>Prepare accident and incident data, and load it to temporary data table.</p> <p>See “Monitor Health and Safety Reports” (Application Fundamentals).</p>                                                                                                                                                                                                    |
| Illness Data DEU Page                                                                | RUNCTL_OHS504GR               | <p>Prepare illness data, and load it to temporary data table.</p> <p>See “Monitor Health and Safety Reports” (Application Fundamentals).</p>                                                                                                                                                                                                                  |
| <u>Mixed Committee MEX Page</u>                                                      | MIX_COM_TBL_MEX               | Identify details for Mexican mixed committees.                                                                                                                                                                                                                                                                                                                |
| RIDDOR Data Page                                                                     | RUNCTL_OHS_UK                 | <p>Collect RIDDOR data for GBR Health and Safety reporting.</p> <p>See <a href="#">(GBR) Collecting RIDDOR Data for UK reports</a>.</p>                                                                                                                                                                                                                       |
| <u>Submit Injury Report Page</u>                                                     | INIT_BC_WCB_WEB               | Create and transmit injury reports.                                                                                                                                                                                                                                                                                                                           |

| <b>Component or Page Name</b>       | <b>Definition Name</b> | <b>Usage</b>                                                                                                                                                                                     |
|-------------------------------------|------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Review Submission Status Page       | WCB_INC_SUB_STAT       | Request submission status.<br><br>See <a href="#">Processing Data for WorkSafeBC's Web Service</a> .                                                                                             |
| Review Error Messages Page          | WCB_INJ_ERR_RESP       | Review error messages received from the WCB.<br><br>See <a href="#">Processing Data for WorkSafeBC's Web Service</a> .                                                                           |
| Review Success Messages Page        | WCB_INJ_RPT_RESP       | Review success messages received from the WCB.<br><br>See <a href="#">Processing Data for WorkSafeBC's Web Service</a> .                                                                         |
| Request Submission Status Page      | WCB_SUB_STAT           | Review the submission status of an injury report.<br><br>See <a href="#">Processing Data for WorkSafeBC's Web Service</a> .                                                                      |
| OSHA 301 Incident Report Page       | OSHA_301_SELECT        | Create OSHA-301 incident reports.<br><br>See “Running the U.S. Regulatory Reports” (PeopleSoft Human Resources Meet Regulatory Requirements).                                                    |
| OSHA 301 Incident Report Print Page | RUN_CNTL_OSHA_INT2     | Create OSHA-301 incident reports from incidents that have been specified as being OSHA reportable.<br><br>See “Monitor Health and Safety Reports” (Application Fundamentals).                    |
| OSHA 300 Incident Log Page          | RUN_CNTL_OSHA_INT1     | Generate the OSHA 300 log.<br><br>See “Monitor Health and Safety Reports” (Application Fundamentals).                                                                                            |
| OSHA 300A Annual Summary Page       | RUN_CNTL_OSHA_INT1     | Generate the OSHA 300A Summary report, which provides an overview of the data contained in the OSHA-300 Incident Log.<br><br>See “Monitor Health and Safety Reports” (Application Fundamentals). |

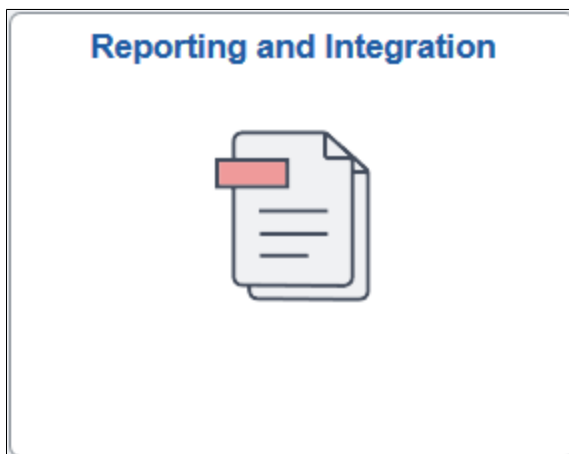


| <b>Component or Page Name</b>              | <b>Definition Name</b> | <b>Usage</b>                                                                                                                                                                              |
|--------------------------------------------|------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| OSHA-200 Log                               | RUNCTL_CALENDARYR      | Lists the case numbers and details of each injury and illness that occurred during a particular calendar year.<br><br>See “Monitor Health and Safety Reports” (Application Fundamentals). |
| <u>Employee Work Restriction Smry Page</u> | HR_WORK_RESTR_SUM      | View the list of valid and current work restrictions by employee.                                                                                                                         |

## Reporting and Integration Tile

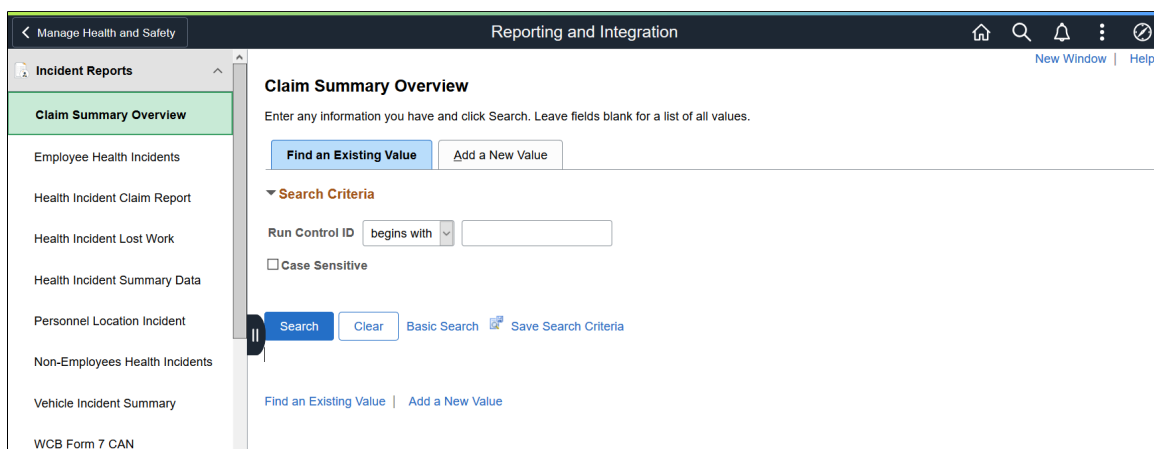
Use the Reporting and Integration tile (HC\_HS\_REPORTING\_FL\_GBL) to access a collection of administrative components for Health and Safety reporting.

This example illustrates the Reporting and Integration tile.



Click the Reporting and Integration tile to access the Reporting and Integration application start page.

This example illustrates the Reporting and Integration application start page.



This Reporting and Integration application start page is a navigation collection that enables administrators to access Health and Safety reporting components from one location.

The application start page lists the components collected under these categories:

- Incident Reports
- Process and Collect Data
- WCB Web Services CAN
- Monitor Web Services CAN
- OSHA Injury/Illness Reporting
- Employee Work Restrictions

Rows that display a downward facing arrow are category headers. Select a category row to expand and view the component collection associated with that category.

### Related Links

[Managing Health and Safety Tasks as Administrators Using Fluid](#)

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## Setting Up Health and Safety as Administrators Using Fluid

This topic lists the pages that Health and Safety administrators can access from a single location on the Workforce Administrator home page to set up Health and Safety data and specify configuration settings for Fluid Self-Service.

### Pages Used to Set Up Health and Safety as Administrators Using Fluid

| <i>Component or Page Name</i>                    | <i>Definition Name</i> | <i>Usage</i>                                                                                                                                 |
|--------------------------------------------------|------------------------|----------------------------------------------------------------------------------------------------------------------------------------------|
| <a href="#">Configure Health and Safety Tile</a> | HC_HS_CONFIG_FL_GBL    | Access a collection of administrative components to define setup data and configure self-service settings for Health and Safety.             |
| Accident Types                                   | ACCIDENT_TYPE_TBL      | Describe events that can result in physical occupational injuries.<br><br>See <a href="#">Defining Injuries and Illnesses</a> .              |
| Body Parts Page                                  | BODY_PART_TABLE        | Identify body parts that are subject to injury and associate each with a class.<br><br>See <a href="#">Defining Injuries and Illnesses</a> . |

| <b>Component or Page Name</b>                                                      | <b>Definition Name</b> | <b>Usage</b>                                                                                                                                                                                                   |
|------------------------------------------------------------------------------------|------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Nature of Injury Page                                                              | INJURY_NATURE_TBL      | Identify types of physical injuries.<br><br>See <a href="#">Defining Injuries and Illnesses</a> .                                                                                                              |
| Source of Injury Page                                                              | INJURY_SOURCE_TBL      | Identify potential sources or causes of injury.<br><br>See <a href="#">Defining Injuries and Illnesses</a> .                                                                                                   |
| Unsafe Acts Page                                                                   | UNSAFE_ACT_TABLE       | Assign codes to the causes of injuries and accidents and track incidents by associating an Unsafe Act code with the resulting Accident Type code.<br><br>See <a href="#">Defining Injuries and Illnesses</a> . |
| <a href="#">Animal Table Page or Animals Involved Page</a>                         | HS_ANIMAL_TBL          | Identify the types of animals involved in incidents.                                                                                                                                                           |
| <a href="#">Transport Table Page or Transportation Page</a>                        | HS_TRANSPORT_TBL       | Identify the modes of transportation used by employees during incidents that occur during work-related travel.                                                                                                 |
| <a href="#">Class/Subclass Table - CAN Page or Class/Subclass CAN Page</a>         | HS_CLASS_CAN           | Identify the standard industry classes and subclasses for Canadian business locations, based upon the classifications designated by the WCB.                                                                   |
| <a href="#">Occupation Table - CAN Page or Occupations CAN Page</a>                | HS_OCCUPATION_CAN      | Set up the standard occupational classifications used by the WCB.                                                                                                                                              |
| <a href="#">Contributing Factors - CAN Page or Contributing Factors CAN Page</a>   | HS_CONTFAC_CAN         | Define the types of casual factors associated with a health and safety incident.                                                                                                                               |
| <a href="#">Prevent. Actions Table - CAN Page or Preventative Actions CAN Page</a> | HS_PREVENT_ACT_CAN     | Identify the types of actions taken to prevent future occurrences of incidents and accidents.                                                                                                                  |
| <a href="#">Case Officer Table DEU Page or Case Officer DEU Page</a>               | HS_LOC_CASEOFF_GER     | Identify the officials for various areas of industrial health and safety within the organization.                                                                                                              |
| <a href="#">Correct. Actions Table DEU Page or Corrective Actions DEU Page</a>     | HS_CORRECT_ACT_GER     | Define corrective actions that you have implemented and associate the corrective action with a corrective action category.                                                                                     |

| <b>Component or Page Name</b>                                              | <b>Definition Name</b> | <b>Usage</b>                                                                                                                                   |
|----------------------------------------------------------------------------|------------------------|------------------------------------------------------------------------------------------------------------------------------------------------|
| <u>Disease Class Table DEU Page or Disease Class DEU Page</u>              | HS_DIS_CLASS_GER       | Define disease classes and associate them with a disease type.                                                                                 |
| <u>Prevent. Actions Table - DEU Page or Preventative Actions DEU Page</u>  | HS_PREVENT_ACT_GER     | Define the actions that you have implemented to prevent workplace incidents or accidents.                                                      |
| <u>Unsafe Item Table DEU Page or Unsafe Items DEU Page</u>                 | HS_UNSAFE_ITEM_GER     | Define unsafe items and associate them with an unsafe item class.                                                                              |
| <u>Work Area Class Table DEU Page or Work Area Class DEU Page</u>          | HS_WA_CLS_TBL_GER      | Set up work area classes as defined by the employer's liability insurance association.                                                         |
| <u>Work Area Category Table DEU Page or Work Area Category DEU Page</u>    | HS_WA_CTG_TBL_GER      | Set up work area categories as defined by the employer's liability insurance association.                                                      |
| <u>Work Area Table DEU Page or Work Area DEU Page</u>                      | HS_WA_TBL_GER          | Set up work areas as defined by the employer's liability insurance association.                                                                |
| <u>External Scheme GBR Page</u>                                            | HS_EXT_SCHEME_UK       | Maintain an External Scheme.                                                                                                                   |
| <u>Dangerous Occurrences Table Page or Dangerous Occurrences Page</u>      | HS_DANGER_OCC          | Define types of dangerous occurrences or specify those that are defined by the regulatory authority in the regulatory region.                  |
| <u>Job Code Hazards Table Page or Job Code Hazards Page</u>                | JOBCODE_HAZRDS_TBL     | Track exposure to hazards experienced by employees in a particular job code.                                                                   |
| <u>Location Hazards Table Page or Location Hazards Page</u>                | LOCATN_HAZRDS_TBL      | Identify exposures to hazards that have occurred at specific locations in the organization.                                                    |
| <u>Hazardous Materials Data Page or Hazardous Condition/Materials Page</u> | HAZ_CON_MATRL_TBL      | Define codes for physical conditions and hazardous materials that might directly contribute to occupational accidents, injuries, or illnesses. |
| <u>Hazard Units BRA Page</u>                                               | HAZ_UNITS_BRA          | Define hazard units.                                                                                                                           |
| <u>Hazard Concepts BRA Page</u>                                            | HAZ_CONCEPT_BRA        | Define hazard concepts.                                                                                                                        |

| <b>Component or Page Name</b>                                                            | <b>Definition Name</b>                                             | <b>Usage</b>                                                                                                                                                                |
|------------------------------------------------------------------------------------------|--------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Work Hazards BRA (component)                                                             | HAZARD_TBL_BRA (definition name of the first component page)       | Define codes for occupational accidents, injuries, or illnesses.<br><br>See <a href="#">Defining Dangerous Occurrences and Hazardous Conditions</a> .                       |
| Job Code Hazards BRA (component)                                                         | JOB_CODE_HAZARDS_TBL (definition name of the first component page) | Track exposure to hazards experienced by employees in a particular job code.<br><br>See <a href="#">Defining Dangerous Occurrences and Hazardous Conditions</a> .           |
| Work Area Hazards BRA (component)                                                        | LOCATION_HAZ_BRA (definition name of the first component page)     | Track exposure to hazards experienced by employees in a particular location.                                                                                                |
| Workers Conditions BRA (component)                                                       | WORKER_ENVIRON_BRA (definition name of the first component page)   | Define working conditions (including workplace, work activities, and work hazards) of workers.<br><br>See <a href="#">(BRA) Defining Work Environments and Conditions</a> . |
| <a href="#">Workplace Table BRA Page</a>                                                 | WORKPLACE_BRA                                                      | Define work environments.                                                                                                                                                   |
| Medical Facilities Page                                                                  | HS_MEDICAL_FAC                                                     | Enter hospitals and clinics and their addresses.<br><br>See <a href="#">Defining Medical Services Information</a> .                                                         |
| Physicians                                                                               | HS_PHYSICIAN_DATA1                                                 | Enter name and address information of physicians.<br><br>See <a href="#">Defining Medical Services Information</a> .                                                        |
| <a href="#">Diagnosis Table Page or Diagnosis Page or Diagnosis for Regulations Page</a> | DIAGNOSIS_TABLE                                                    | Define standard medical diagnoses for injuries and illnesses.                                                                                                               |
| <a href="#">Occupational Illnesses Table Page or Occupational Illnesses Page</a>         | HS_OCC_ILLNESS                                                     | Enter standard types of occupational illnesses.                                                                                                                             |
| <a href="#">Claim Threshold - Claims AUS Page</a>                                        | CLAIM_INFO_AUS                                                     | Establish claims threshold information.                                                                                                                                     |
| Claim Threshold - Claims AUS Page<br>(For State AUS)                                     | CLAIM_INFO_AUS                                                     | Establish claims threshold information by state.                                                                                                                            |

| <b>Component or Page Name</b>                        | <b>Definition Name</b>                                    | <b>Usage</b>                                                                                                                                                                               |
|------------------------------------------------------|-----------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Claim Threshold - Claims AUS Page<br>(For Union AUS) | CLAIM_INFO_AUS                                            | Establish claims threshold information by state.                                                                                                                                           |
| Medicare Item Details AUS Page                       | MEDICARE_TBL_AUS                                          | Define Medicare items.<br><br>See <a href="#">Defining Injuries and Illnesses</a> .                                                                                                        |
| Allergy Page                                         | ALLERGY_TBL                                               | Define allergy types.<br><br>See <a href="#">Defining Injuries and Illnesses</a> .                                                                                                         |
| Immunization (component)                             | IMMUN_TBL (definition name of the first component page)   | Define immunization types.<br><br>See <a href="#">Immunization Page</a> and <a href="#">Immunization - Self-Service Page</a> .                                                             |
| Test (component)                                     | HS_TEST_TBL (definition name of the first component page) | Define test types.<br><br>See <a href="#">Test Page</a> and <a href="#">Test - Self-Service Page</a> .                                                                                     |
| Medication Page                                      | MEDCATN_TBL                                               | Define medication types.<br><br>See <a href="#">Defining Injuries and Illnesses</a> .                                                                                                      |
| Codes and Effective Dates Page                       | WORK_RESTRICT_TBL                                         | Identify physical limitations or restrictions placed on individuals as a result of injuries or illnesses.<br><br>See <a href="#">Defining Work Restrictions and Modified Work Duties</a> . |
| Modified Work Page                                   | MODIFIED_WORK_TBL                                         | Identify changes and modifications to processes or methods of doing a job.<br><br>See <a href="#">Defining Work Restrictions and Modified Work Duties</a> .                                |
| <a href="#">Configure Incident Types Page</a>        | HS_SS_INCDT_CFG                                           | Configure system settings for reporting incidents in Fluid Self Service.                                                                                                                   |
| <a href="#">Employer-Related Codes Page</a>          | WCB_EMPLR_REL_CD                                          | Request employer codes.                                                                                                                                                                    |
| <a href="#">System Codes Page</a>                    | WCB_SYSTEM_CD                                             | Request system codes.                                                                                                                                                                      |
| <a href="#">Register Employer Web Service Page</a>   | WCB_WEB_REG_DTLS                                          | Enter employer WCB registration details.                                                                                                                                                   |

## Configure Health and Safety Tile

Use the Configure Health and Safety tile (HC\_HS\_CONFIG\_FL\_GBL) to access a collection of administrative components to define setup data and configure self-service settings for Health and Safety.

This example illustrates the Configure Health and Safety tile.



Click the Configure Health and Safety tile to access the Configure Health and Safety application start page.

This example illustrates the Configure Health and Safety application start page.

 A screenshot of the "Configure Health and Safety" application interface. The top navigation bar is dark blue with the title "Configure Health and Safety" and icons for home, search, notifications, and user profile. Below the navigation bar is a sidebar on the left with a "Define Accident/Injury Info" section. The main content area is titled "Accident Types" and contains a search form. The search form has a "Find an Existing Value" button and an "Add a New Value" button. Below these are search criteria fields for "Set ID", "Accident Type", and "Description", each with a "begins with" dropdown and a search input field. There are also checkboxes for "Include History", "Correct History", and "Case Sensitive". At the bottom of the search form are "Search", "Clear", "Basic Search", and "Save Search Criteria" buttons.

This Configure Health and Safety application start page is a navigation collection that enables administrators to access components to define setup data and configure self-service settings from one location.

The application start page lists the components collected under these categories:

- Define Accident/Injury Info
- Define Hazardous Environments
- Define Medical Services

- Define Medical Data
- Define Work Restrictions
- Self Service
- WCB Web Service CAN

Rows that display a downward facing arrow are category headers. Select a category row to expand and view the component collection associated with that category.

## Immunization Page

Use the Immunization page (IMMUN\_TBL) to define vaccines.

Navigation:

- **Set Up HCM > Product Related > Workforce Monitoring > Health and Safety > Immunization > Immunization**
- Select *Define Medical Data*, then *Immunization* from the left panel of the Configure Health and Safety application start page.

This example illustrates the fields and controls on the Immunization page.

The screenshot displays the 'Immunization' page with the following details:

- Set ID:** USA
- Immunization Code:** K016
- Immunization Details:**
  - \*Effective Date: 01/01/1900
  - \*Status: Active
  - \*Description: COVID-19
  - Short Description: COVID-19
- Vaccine Details:**
  - Schedule: 12 Months
- Manufacturer Details Table:**

| Manufacturer | Description     | Authorization | Series  |   |   |
|--------------|-----------------|---------------|---------|---|---|
| K001         | Pfizer-BioNTech | Emergency Use | 2 Doses | + | - |
| K002         | Moderna         | Emergency Use | 2 Doses | + | - |

Refer to the [Safety First. Tracking employee's COVID vaccinations in Health & Safety strategy blog post](#) for an example on how an employee reports their vaccination information in a couple of steps in Self Service using the **Vaccinations** tile, as well as guidance on the setup of the functionality.

Enter the effective date, status, and description of the vaccine definition. They are required fields.

### Vaccine Details

The system uses information in this section when employees report their vaccinations in Fluid Self Service.



| <b>Field or Control</b> | <b>Description</b>                                                                                                                                                                                                                                                                                                                      |
|-------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Schedule</b>         | <p>Enter the recommended frequency (in months or years) for taking the vaccine or vaccine series, if it is to be taken on a regular basis.</p> <p>The system uses this information to calculate the due date for the next vaccination (single-dose) or vaccination series (multi-dose) on the <a href="#">Vaccine Details Page</a>.</p> |
| <b>Manufacturer</b>     | <p>Select the manufacturer of the vaccine. If the vaccine has multiple manufacturers, insert more rows and enter the information.</p> <p>Manufacturers are defined on the Manufacturers page (HS_MANUFACT_TBL).</p>                                                                                                                     |
| <b>Authorization</b>    | <p>Specify the authorization status of the vaccine by the manufacturer. Values are:</p> <p><i>Approved for Use</i></p> <p><i>Emergency Use</i></p> <p><i>Not Authorized</i></p> <p>This value is informational only and is not used in any processing.</p>                                                                              |
| <b>Series</b>           | Specify the number of doses included in the vaccine.                                                                                                                                                                                                                                                                                    |

## Related Links

[Reporting Vaccinations as Employees](#)

## Immunization - Self-Service Page

Use the Immunization - Self-Service page (IMMUN\_SS\_TBL) to configure self-service settings for vaccines.

Navigation:

- **Set Up HCM > Product Related > Workforce Monitoring > Health and Safety > Immunization > Self-Service**
- Select *Define Medical Data*, then *Immunization* from the left panel of the Configure Health and Safety application start page. Select the **Self-Service** tab.

This example illustrates the fields and controls on the Immunization - Self Service page.

|                                                                                                                                                                                                                                                                                                             |                     |                                                    |        |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|----------------------------------------------------|--------|
| Immunization                                                                                                                                                                                                                                                                                                | <b>Self-Service</b> |                                                    |        |
| Set ID                                                                                                                                                                                                                                                                                                      | USA                 | Immunization Code                                  | K016   |
| <b>Immunization Details</b>                                                                                                                                                                                                                                                                                 |                     | <input type="text"/>   < << 1 of 1 >> >   View All |        |
| Effective Date                                                                                                                                                                                                                                                                                              | 01/01/1900          | Status                                             | Active |
| Description                                                                                                                                                                                                                                                                                                 | Covid-19            |                                                    |        |
| Short Description                                                                                                                                                                                                                                                                                           | COVID-19            |                                                    |        |
| <b>Self-Service Configuration</b>                                                                                                                                                                                                                                                                           |                     |                                                    |        |
| <input checked="" type="checkbox"/> Available in Self Service<br><input checked="" type="checkbox"/> Display Manufacturer Details<br><input checked="" type="checkbox"/> Display Next Due Date                                                                                                              |                     |                                                    |        |
| <b>Attachments</b>                                                                                                                                                                                                                                                                                          |                     |                                                    |        |
| <input checked="" type="checkbox"/> Enable Attachments<br><input checked="" type="checkbox"/> Require Attachment Upload                                                                                                                                                                                     |                     |                                                    |        |
| <b>Acknowledgements</b>                                                                                                                                                                                                                                                                                     |                     |                                                    |        |
| <input checked="" type="checkbox"/> Enable Acknowledgements<br>Category <input type="text" value="HANDS"/> <input type="button" value="Q"/> Health and Safety Category<br>ID <input type="text" value="HS2"/> <input type="button" value="Q"/> Health and Safety Self Service                               |                     |                                                    |        |
| <b>Approvals</b>                                                                                                                                                                                                                                                                                            |                     |                                                    |        |
| <input checked="" type="checkbox"/> Enable Approvals Workflow<br>Process ID <input type="text" value="HSImmunization"/> <input type="button" value="Q"/> Vaccination Approval<br>Definition ID <input type="text" value="byAdministrator"/> <input type="button" value="Q"/> Health and Safety Vaccinations |                     |                                                    |        |

## Self-Service Configuration

| Field or Control                    | Description                                                                                                                                                                                                                  |
|-------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Available in Self Service</b>    | Select for this vaccine to be available for selection when employees report vaccinations in Fluid Self Service. Most check boxes on this page become editable when this option is selected.                                  |
| <b>Display Manufacturer Details</b> | Select to show fields that are related to the vaccine manufacturer when employees add or view vaccination entries. You can use this option after manufacturer details are entered on the <a href="#">Immunization Page</a> . |

| <b>Field or Control</b>      | <b>Description</b>                                                                                                                                                                                                                                         |
|------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Display Next Due Date</b> | Select to show the next vaccination due date after employees report their single-dose vaccinations, or the last dose of their vaccination series. You can use this option after schedule information is entered on the <a href="#">Immunization Page</a> . |

## Attachments

| <b>Field or Control</b>          | <b>Description</b>                                                                                                               |
|----------------------------------|----------------------------------------------------------------------------------------------------------------------------------|
| <b>Enable Attachments</b>        | Select to allow attachments to be inserted when employees add entries for this vaccine.                                          |
| <b>Require Attachment Upload</b> | Select to require attachments (for example, vaccination record copy) to be inserted when employees add entries for this vaccine. |

## Acknowledgements

| <b>Field or Control</b>        | <b>Description</b>                                                                                                                |
|--------------------------------|-----------------------------------------------------------------------------------------------------------------------------------|
| <b>Enable Acknowledgements</b> | Select to require employees to provide acknowledgement when they add or update entries for this vaccine.                          |
| <b>Category and ID</b>         | Enter the category and ID of the configuration to be used for the <b>Acknowledgment</b> section that appears on the details page. |

## Approvals

| <b>Field or Control</b>          | <b>Description</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|----------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Enable Approvals Workflow</b> | <p>Select for entries of this vaccine to be submitted to administrators for approval using the Approval Workflow Engine (AWE). The administrator approves, pushes back (if more information is needed) or denies entries on the Pending Approvals page, which is accessible from the Approvals tile, push notifications, and email links.</p> <p>Clear this check box if approval is not needed. When approval is not enabled, no push notifications or email notifications will be sent.</p> |

| <b>Field or Control</b>             | <b>Description</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|-------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Process ID and Definition ID</b> | <p>Specify the process and definition IDs to be used for the approval process. These fields are required if the <b>Enable Approvals Workflow</b> check box is selected.</p> <p>The system delivers the <i>HSImmunization</i> process ID and <i>byAdministrator</i> definition ID for use in vaccination approval.</p> <hr/> <p><b>Note:</b> If the <b>Enable Approvals Workflow</b> check box is selected, AWE sends email and push notifications based on the setup of the process ID.</p> <hr/> |

## Related Links

[Reporting Vaccinations as Employees](#)

## Test Page

Use the Test page (HS\_TEST\_TBL) to define tests.

Navigation:

- **Set Up HCM > Product Related > Workforce Monitoring > Health and Safety > Test > Test**
- Select *Define Medical Data*, then *Test* from the left panel of the Configure Health and Safety application start page.

This example illustrates the fields and controls on the Test page.

The screenshot shows the 'Test' page in the Fluid Self Service interface. The page has two tabs: 'Test' (active) and 'Self-Service'. Below the tabs, there are fields for 'Set ID' (USA) and 'Test Code' (K004). The main section is titled 'Test Details' and contains fields for '\*Effective Date' (07/19/2021), '\*Status' (Active), '\*Description' (Covid-19 Antibody), 'Short Description' (COVID-19), and 'Test Type' (Antibody). To the right of these fields are '+' and '-' buttons. Below the 'Test Details' section is the 'Test Results' section, which has a table with two rows: 'Normal' and 'Abnormal'. Each row has a dropdown menu and '+' and '-' buttons. Below the 'Test Results' section is the 'Test Methods' section, which has a table with one row: 'CT Scan'. This row has a dropdown menu and '+' and '-' buttons.

Refer to the [Safety First. Tracking employee's medical tests in Health & Safety strategy blog post](#) for an example on how an employee reports their test results in a couple of steps in Self Service using the **Test Results** tile. They can file a workplace incident if they are tested positive for an illness (for example, COVID-19) that was caused by work-related activities. The incident information can then be viewed and analyzed by administrators using PeopleSoft Insights.

Enter the effective date, status, and description of the test definition. They are required fields.

## Test Details

The system uses information in this section when employees report their test results in Fluid Self Service.

| <b>Field or Control</b> | <b>Description</b>                                                                                                                                                                                                                                                  |
|-------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Test Type</b>        | <p>Select the type of the test. Values are:</p> <p><i>Antibody</i></p> <p><i>Biopsy</i></p> <p><i>Diagnostic</i></p> <p><i>Genetic</i></p> <p><i>Imaging</i></p> <p><i>Screening</i></p> <p>This value is informational only and is not used in any processing.</p> |

## Test Results

Specify possible results that employees can select when they report test results in Fluid Self Service.

## Test Methods

Specify possible methods that employees can select when they report results of this test in Fluid Self Service.

## Related Links

[Reporting Test Results as Employees](#)

## Test - Self-Service Page

Use the Test - Self-Service page (HS\_TEST\_SS\_TBL) to configure self-service settings for tests.

Navigation:

- **Set Up HCM > Product Related > Workforce Monitoring > Health and Safety > Test > Self-Service**
- Select *Define Medical Data*, then *Test* from the left panel of the Configure Health and Safety application start page. Select the **Self-Service** tab.

This example illustrates the fields and controls on the Test - Self Service page.

The screenshot displays the 'Test - Self Service' page. At the top, there are tabs for 'Test' and 'Self-Service'. Below the tabs, the 'Set ID' is 'USA' and the 'Test Code' is 'K004'. The 'Test Details' section shows the 'Effective Date' as '07/19/2021', 'Status' as 'Active', 'Description' as 'Covid-19 Antibody', and 'Short Description' as 'COVID-19'. The 'Self-Service Configuration' section has a checkbox for 'Available in Self Service'. The 'Attachments' section has checkboxes for 'Enable Attachments' and 'Require Attachment Upload'. The 'Acknowledgements' section has a checkbox for 'Enable Acknowledgements', a 'Category' dropdown set to 'HANDS', and an 'ID' dropdown set to 'HS2'. The 'Approvals' section has a checkbox for 'Enable Approvals Workflow', a 'Process ID' dropdown set to 'HSTest', and a 'Definition ID' dropdown set to 'byAdministrator'.

**Note:** The Self-Service pages of immunizations and tests are similar. For details about the **Attachments**, **Acknowledgements** and **Approvals** sections, see [Immunization - Self-Service Page](#).

| <i>Field or Control</i>          | <i>Description</i>                                                                                                                                                                       |
|----------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Available in Self Service</b> | Select for this test to be available for selection when employees report test results in Fluid Self Service. Most check boxes on this page become editable when this option is selected. |

## Approvals

The system delivers the *HSTest* process ID and *byAdministrator* definition ID for use in test result approval.

## Related Links

[Reporting Test Results as Employees](#)

## Configure Incident Types Page

Use the Configure Incident Types page (HS\_SS\_INCDT\_CFG) to configure system settings for reporting incidents in Fluid Self Service.

Navigation:

Select *Self Service*, then *Configure Incident Types* from the left panel of the Configure Health and Safety application start page.

This example illustrates the fields and controls on the Configure Incident Types page.

**Configure Incident Types**

Incident Type: Accident  
Regulatory Region: USA United States

**Self Service Configuration**

\*Effective Date: 01/01/2000 \*Status: Active  
☒ Available in Self Service

**Approvals and Notifications**

☒ Enable Approvals Workflow

Process ID: HSIncidentReport Incident Report Approval  
Definition ID: byAdministrator Health and Safety Incident

☐ Notify Employee  
☐ Notify Administrator

**Activity Guide**

Activity Guide Category: HANDS  
\*Template: KUINCD1 Report Incident

Use this page to configure settings for the *Report Incident* transaction in Fluid Self Service by incident type and regulatory region.

The system delivers a default configuration for each supported incident type.

If regulatory region-specific configurations are available, the system uses the regulatory region found from the user's job record to determine if a regulatory region-specific configuration should be used.

| Field or Control          | Description                                                                                                        |
|---------------------------|--------------------------------------------------------------------------------------------------------------------|
| Available in Self Service | Select for this incident type to be available for selection when employees create incidents in Fluid Self Service. |



## Approvals and Notifications

| <b>Field or Control</b>                                 | <b>Description</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|---------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Enable Approvals Workflow</b>                        | <p>Select for incidents of the corresponding type and regulatory region to be submitted to administrators for approval using approval workflow in the Notification Composer Framework.</p> <p>The administrator either approves or pushes back (if more information is needed) the submitted incident on the <a href="#">Pending Approvals - Incident Report Page</a>.</p> <p>Clear this check box if approval is not needed in the incident reporting process. In this scenario, when an employee reports an incident, both the administrator and employee receive a notification (if enabled on this page) from the system acknowledging the receipt of the incident. The administrator can review the incident using the link provided in the notification, and does not require to perform any further action.</p> |
| <b>Process ID and Definition ID</b>                     | <p>Specify the process and definition IDs to be used for the approval process. These fields are required if the <b>Enable Approvals Workflow</b> check box is selected.</p> <p>The system delivers the <i>HSIncidentReport</i> process ID and <i>byAdministrator</i> definition ID for use in incident approval.</p> <hr/> <p><b>Note:</b> If the <b>Enable Approvals Workflow</b> check box is selected, AWE sends email and push notifications based on the setup of the process ID. If the check box is cleared, notifications are managed by the <b>Notify Employee</b> and <b>Notify Administrator</b> check boxes.</p> <hr/>                                                                                                                                                                                     |
| <b>Notify Employee and Employee Notification Events</b> | <p>Select the option to enable notifications for employees, when incidents that do not require approval are reported in the system. This option becomes editable when the <b>Enable Approvals Workflow</b> check box is <i>not</i> selected. If the <b>Enable Approvals Workflow</b> check box is selected, notifications will be handled through the approval workflow setup of the <i>Report Incidents</i> business process in the Notification Composer Framework.</p> <p>When selected, use the <b>Employee Notification Events</b> link that appears to specify the notification ID that is used to trigger notifications for employees. The default notification ID is <i>HealthSafetyIncidents</i>.</p> <p>See Also “Understanding Notification Composer” (Enterprise Components).</p>                          |

| <b>Field or Control</b>                                           | <b>Description</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|-------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Notify Administrator and Administrator Notification Events</b> | <p>Select the option to enable notifications for administrators, when incidents that do not require approval are reported in the system. This option becomes editable when the <b>Enable Approvals Workflow</b> check box is <i>not</i> selected. If the <b>Enable Approvals Workflow</b> check box is selected, notifications will be handled through the approval workflow setup of the <i>Report Incidents</i> business process in the Notification Composer Framework.</p> <p>When selected, use the <b>Administrator Notification Events</b> link that appears to specify the notification ID that is used to trigger notifications for administrators. The default notification ID is <i>HealthSafetyIncidentsAdmin</i>.</p> <p>See Also “Understanding Notification Composer” (Enterprise Components).</p> |

## Activity Guide

Specify the Activity Guide Composer template used to report incidents for the corresponding incident type. The system-delivered template is *HSINCD1* (Report Incident).

## Related Links

[Reporting Incidents as Employees](#)

[Managing Health and Safety Tasks as Administrators Using Fluid](#)

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## Viewing Incident Insights

PeopleSoft Incident Analytics dashboard provides administrators the ability to view and analyze Health and Safety incident data using PeopleSoft Insights visualizations.

Based on user privileges, administrators can access the visualizations delivered on the Incident Analytics dashboard to monitor the safety of workers in the workplace and identify trends of incident occurrence by region or type. Based on the information gathered from the Incident analytics, the company can implement new policies as needed to maintain or improve the health and safety of working environments.

The Incident Analytics dashboard is built on the PeopleSoft Insights platform, which relies on an underlying analytics engine and search engine. Incident data that is visible on the dashboard comes from the *HC\_HS\_INCIDENT\_DATA* search index.

This video provides an overview of the Incident Analytics dashboard:

Video: [Image Highlights, PeopleSoft HCM Update Image 37: PeopleSoft Insights for Health and Safety](#)

This topic provides an overview of how to set up the dashboard for incident analytics, lists common elements and controls, and discusses the Incident Analytics dashboard.

## Understanding PeopleSoft Insights

PeopleSoft Insights is an analytical engine that provides visual reports (visualizations) in the form of charts, tables, graphs and so on. The visualizations are based on queries that retrieve data from the PeopleSoft Search Framework.

These videos provide an overview of the PeopleSoft Insights feature:

Video: [Insights with PeopleSoft](#)

Video: [PeopleSoft HCM Insights](#)

For information on Insights dashboards, see:

- “Understanding PeopleSoft Insights” (Application Fundamentals)
- *PeopleTools Search Technology*: "Monitoring PeopleSoft Search Framework and OpenSearch" and "Working with Insights Dashboards for PeopleSoft Application Data" documentation.

## Pages Used to View Incident Insights

| <b>Page Name</b>                             | <b>Definition Name</b>                             | <b>Usage</b>                                           |
|----------------------------------------------|----------------------------------------------------|--------------------------------------------------------|
| <a href="#">Incident Analytics Tile</a>      | HC_HS_ANALYTICS_FL (this is the cref for the tile) | Access the Incident Analytics dashboard.               |
| <a href="#">Incident Analytics Dashboard</a> | PTSF_KIBANA_COMP                                   | Review and analyze incident data using visualizations. |

## Understanding How to Set Up Insights Dashboards for Incident Analytics

Before administrators can access the visualizations for incident data, the following steps should be performed:

1. Deploy the *HC\_HS\_INCIDENT\_DATA* (Incident Data) index.

**(PeopleTools > Search Framework > Search Admin Activity Guide > Administration > Deploy/Delete Object)**

2. Build the *HC\_HS\_INCIDENT\_DATA* search index.

**(PeopleTools > Search Framework > Search Admin Activity Guide > Administration > Schedule Search Index)**

3. Deploy the *Incident Analytics Tile* and *Incident Analytics* dashboard.

**(PeopleTools > Search Framework > Administration > Deploy Insights Dashboards)**

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**Note:** The full index must be run before the dashboard can be deployed.

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4. Assign these user roles to administrators to access and view Incident Analytics visualizations:

- *Health and Safety ADM Fluid*, which provides access to the Incident Analytics tile and dashboard.
- *Health & Safety Administrator*, which provides access to incident data components, allowing users to view incident data presented on visualizations.

**Real Time Index for Incident Analytics Visualizations**

The HC\_HS\_INCIDENT\_DATA (Incident Details) search index supports real time indexing (RTI) with PeopleTools version 8.59.10 or higher. When enabled, RTI allows real-time updates to the indexed data that is viewable in incident analytics.

For more information about Real Time Indexing, refer to *PeopleTools Search Technology*, "Administering Real Time Indexing."

**Related Links**

- “Understanding PeopleSoft Insights Using PeopleSoft Search Framework” (Application Fundamentals)
- “Understanding Real Time Indexing in HCM” (Application Fundamentals)

**Common Elements and Controls**

This section lists the common elements and controls that are used in Insights analytics.

For more information on working with PeopleSoft Insights and filters, see *PeopleTools: Search Technology*, "Working with Insights Dashboards for PeopleSoft Application Data" documentation.

**Search and Filter Options:**

**Note:** Filtering options apply to all visualizations, which allows users to drill down on all the charts at once.

| <i><b>Term</b></i>                                                                                      | <i><b>Definition</b></i>                                                                                                                                |
|---------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------|
|  (See saved queries) | Click to save the current query text and filters that you want to reuse in the future, or select an existing query to use to update the visualizations. |
| <b>Search</b> field                                                                                     | Enter a query to filter data, if applicable.                                                                                                            |

| <b>Term</b>                                                                                                                     | <b>Definition</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|---------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  (Change all filters), and + <b>Add filter</b> | <p>Enter criteria to filter data on the visualizations. You can apply filters in a number of ways:</p> <ul style="list-style-type: none"> <li>• Enter queries in the Search field.</li> <li>• Use the + <b>Add filter</b> link to create filters using fields, operators and field values.</li> <li>• Use delivered filter fields.</li> <li>• Select a chart item from a visualization.</li> <li>• Use the filter options in the Incident Details grid to add or exclude items.</li> <li>• Use the legend to add or exclude items.</li> </ul> <p>Added filters are displayed next to the + <b>Add filter</b> link for reference. For example, when you click a doughnut chart item, the filter is automatically added to your filters list. When you click the pie chart item for <i>Injury</i> type incidents in which employees were hospitalized, the system will prompt you to add the <i>Primary Outcome: Injury and Treatment Received: Hospitalized</i> filters since this item consists of more than one filter.</p> <p>Click the <b>Change all filters</b> icon for a list of actions that can be performed on <i>all</i> filters, for example, disable them temporarily, remove them permanently, or invert inclusion (show data that does not meet filter criteria). Click a filter item for a list of similar actions that can be performed on it individually.</p> |
|  (Calendar) or <b>Show dates</b>             | <p>Select a different time period for the analytics. You can enter it manually, or choose from commonly used date ranges provided the system as well as recently used selections. When a new period is selected, all visualizations are refreshed automatically to reflect that change.</p> <p>If you have selected a commonly used date range, for example, <i>This month</i>, or <i>Week to date</i>, click the <b>Show dates</b> link to view the approximate date period in relation to the current date. For example, the current date is November 1 and the selected date range is <i>Year to date</i>. Clicking the Show dates link displays ~ <i>10 months ago</i> —&gt; <i>now</i>, which indicates that the selected date range started from approximately 10 months ago and ends on the current date.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |

| <b>Term</b>                                           | <b>Definition</b>                                                                                                                                                                                                                                          |
|-------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Regulatory Region, Location, and Establishment</b> | <p>Select to filter incident data by regulatory region, followed by location, then by establishment.</p> <p>You must select a regulatory region before selecting a location. A location must be specified before you can filter data by establishment.</p> |

## Visualization Options:

When you pause over a visualization, the Options and Legend (if applicable) icons are displayed on the top right and bottom corners respectively. Use them to inspect the chart or table and view the details of that visualization, and toggle the legend display.

| <b>Term</b>                                                                                         | <b>Definition</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|-----------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  (Options)         | <p>Pause over the Options icon to select one of these options:</p> <ul style="list-style-type: none"> <li>• <i>Inspect</i>: Select this option to have a slide out page appear providing the details in a grid format. You can also download data from this page.</li> <li>• <i>Maximize panel</i> or <i>Minimize</i>: Select <i>Maximize panel</i> to have the page display this visualization in full screen. Select <i>Minimize</i> to return to the dashboard and display all visualizations.</li> </ul> |
|  (Toggle legend) | <p>Click this icon to hide or display the legend for the chart, if available.</p> <p>You can click an item in the legend to change its color, or add it as a filter (if applicable).</p>                                                                                                                                                                                                                                                                                                                     |
| Chart item (bar, pie slice, and so forth)                                                           | <p>Pause over a chart item, such as a bar item or pie slice, to view a summary of details for that item.</p> <p>Select a chart item to add a filter for it to apply to all visualizations.</p>                                                                                                                                                                                                                                                                                                               |

## Incident Analytics Tile

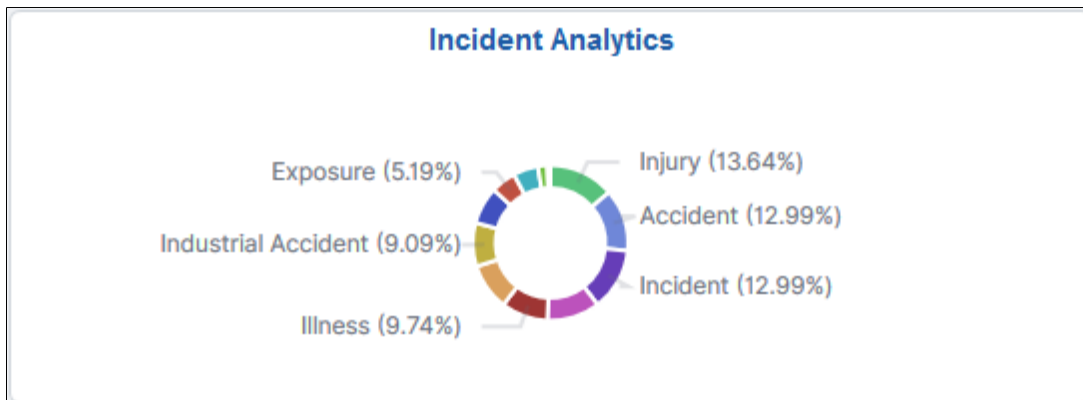
Use the Incident Analytics tile to access the Incident Analytics dashboard.

Navigation:

From the **Workforce Administrator** home page, select the **Manage Health and Safety** tile.

The Incident Analytics tile is located on the [Manage Health and Safety Dashboard](#).

This example illustrates Incident Analytics tile.



The Incident Analytics tile displays the **Incidents by Type** visualization, which gives a snapshot of the distribution of incidents by incident type.

Click this tile to access the [Incident Analytics Dashboard](#) where you can use the visualizations provided to view and manipulate Health and Safety incident data.

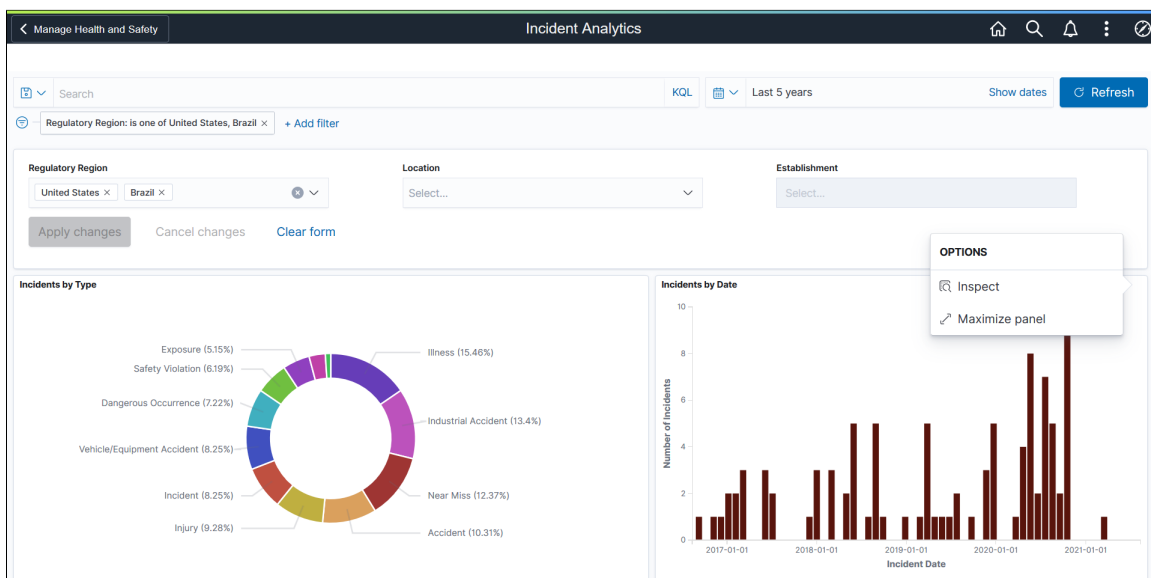
## Incident Analytics Dashboard

Use the Incident Analytics dashboard to review and analyze incident data using visualizations.

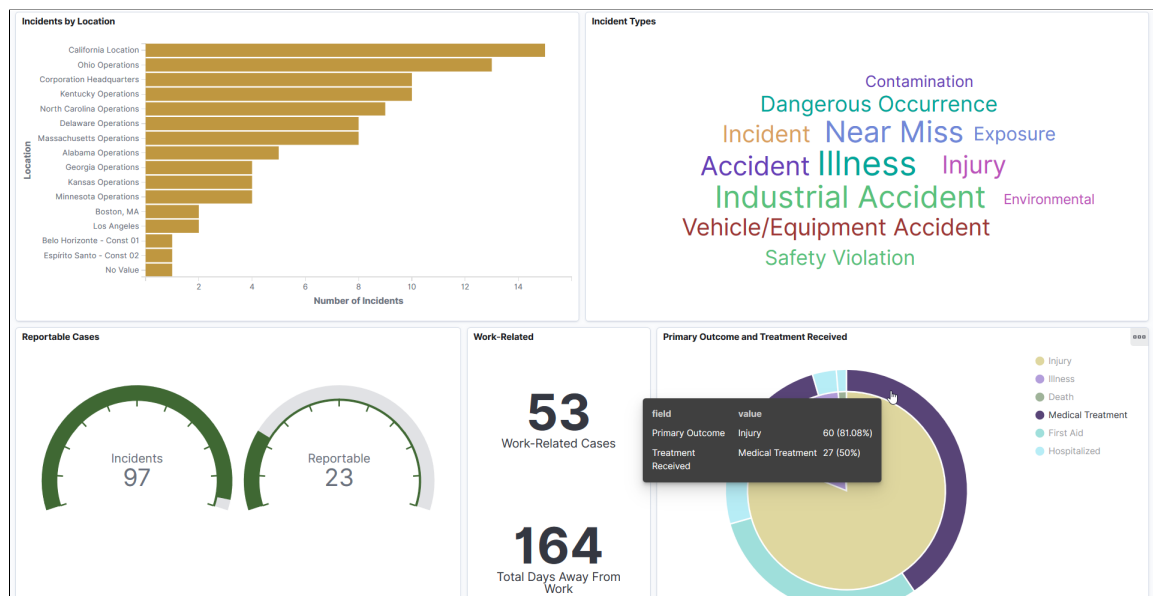
Navigation:

Select the **Incident Analytics** tile.

This example illustrates the fields and controls on the Incident Analytics dashboard (1 of 3). This screenshot shows two filters in place, which has the visualizations display data for incidents that were created in the last 5 years for United States or Brazil with an associated location. It also shows the Options pop-up that will display when you click the Options icon of a visualization.



This example illustrates the fields and controls on the Incident Analytics dashboard (2 of 3). This screenshot shows the popup menu details that appear when you pause over a chart item.



This example illustrates the fields and controls on the Incident Analytics Dashboard (3 of 3). This screenshot shows incident details in tabular format.

| Incident Details |                            |               |                           |                 |                 |                      |                    |                 |                        |
|------------------|----------------------------|---------------|---------------------------|-----------------|-----------------|----------------------|--------------------|-----------------|------------------------|
| Incident Number  | Incident Type              | Incident Date | Location Name             | Employee Name   | Primary Outcome | Occupational Illness | Treatment Received | Reportable Case | Manage Incident        |
| 70000035         | Incident                   | Mar 15, 2018  | Ohio Operations           | Derek Holsinger | Injury          |                      | Medical Treatment  | Not Reportable  | <a href="#">Detail</a> |
| 70000035         | Incident                   | Mar 15, 2018  | Ohio Operations           | Kirby Torres    | Injury          |                      | First Aid          | Not Reportable  | <a href="#">Detail</a> |
| 70000069         | Exposure                   | Jul 21, 2019  | North Carolina Operations | Corrine Tran    | Injury          |                      | Medical Treatment  | Not Reportable  | <a href="#">Detail</a> |
| 70000069         | Exposure                   | Jul 21, 2019  | North Carolina Operations | Justin Galang   | Injury          |                      | Medical Treatment  | Reportable      | <a href="#">Detail</a> |
| 70000086         | Vehicle/Equipment Accident | May 2, 2018   | Massachusetts Operations  | Neil Alvarez    | Injury          |                      | None               | Not Reportable  | <a href="#">Detail</a> |
| 70000086         | Vehicle/Equipment Accident | May 2, 2018   | Massachusetts Operations  | Seek Burkman    | Injury          |                      | Hospitalized       | Reportable      | <a href="#">Detail</a> |
| 70000092         | Vehicle/Equipment Accident | Apr 10, 2020  | Kentucky Operations       | Bill Murkami    | Injury          |                      | Hospitalized       | Not Reportable  | <a href="#">Detail</a> |
| 70000092         | Vehicle/Equipment Accident | Apr 10, 2020  | Kentucky Operations       | Scott Tipman    | Injury          |                      | Hospitalized       | Not Reportable  | <a href="#">Detail</a> |
| 70000094         | Incident                   | Nov 13, 2019  | Corporation Headquarters  | Justin Galang   | Injury          |                      | First Aid          | Not Reportable  | <a href="#">Detail</a> |
| 70000094         | Incident                   | Nov 13, 2019  | Corporation Headquarters  | Scott Tipman    | Injury          |                      | First Aid          | Not Reportable  | <a href="#">Detail</a> |

Export: [Raw](#) [Formatted](#)

1 2 3 4 5 ... 11 »

**Warning!** PeopleSoft Insights dashboards may not render properly if you access them using unsupported platforms.

The Incident Analytics dashboard provides you with different visualizations to view and analyze incident data. For example, you can view the distribution of incidents by type, date, location, primary outcome, or treatment received. You can also see the number of days away from work and the number of cases reported as a result of the incidents. When you select filters or chart items, or modify the date range, PeopleSoft Insights dynamically updates all visualizations using the source from the index.

The dashboard uses role-level security to display permitted data to the user.

**Important!** For optimal performance, only the first 500 rows of data are displayed on the Insights dashboard. Use filters to refine the set of data you wish to visualize using the dashboard.



| <b>Visualization</b>         | <b>Description</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Incidents by Type</b>     | This donut chart visualization displays the number of incidents in percentage by incident type. The chart displays the top 20 incident types (based on frequency).                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>Incidents by Date</b>     | This vertical bar chart visualization displays the number of incidents by incident date.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>Incidents by Location</b> | This horizontal bar chart visualization displays the number of incidents by location.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| <b>Incident Types</b>        | This tag cloud visualization displays incident type terms included in the index. Clicking an incident type term refreshes all visualizations to show the information of incidents specific to the selected type, which is the same result you see when selecting the ring area for that same incident type in the Incidents by Type visualization. The larger the term's font size, the higher the number of incidents that belong that incident type.                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>Reportable Cases</b>      | <p>This visualization displays two gauges: one shows the total number of incidents, and the other one shows the total count of incident injuries or illnesses that are reportable for employees.</p> <p>Incident injuries or illnesses are set as reportable to the authority (for example, OSHA for the USA regulatory region), by selecting the Reportable Case option on the <a href="#">Injury Details - Reporting Page</a>.</p> <p>If more than one employee is involved in an incident, the <b>Incident Details</b> grid displays a row for each employee. The Reportable Case column shows either <i>Reportable</i> or <i>Not Reportable</i> based on the selection of the <b>Reportable Case</b> option on the Reporting page. If no employees are involved in an incident, the grid displays one row the incident, and the row will not show any employee or injury/illness data.</p> |
| <b>Work-Related</b>          | <p>This visualization displays two key information: one shows the total number of incident injuries or illnesses that are classified as work-related for employees, and the other is the total number of days employees were away from work as a result of those work-related cases.</p> <p>Incident injuries or illnesses are set as work-related by selecting the <b>Work-Related</b> option on the <a href="#">Injury Details - Work-Related Page</a>.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                  |

| <b>Visualization</b>                          | <b>Description</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|-----------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Primary Outcome and Treatment Received</b> | This pie chart visualization displays two levels of metrics. The pie area represents the distribution of incidents by primary outcome and the ring area displays the treatment method of the corresponding pie slice. There can be more than one primary outcome for an incident if multiple people are involved. In this scenario, you can refer to the Incident Details grid for more information, such as the people involved in the incident, the primary outcome of the incident for them, and so forth. |

## Incident Details

The **Incident Details** grid lists the incident data, which is presented in visualizations, in a tabular format.

| <b>Field or Control</b>                                                                                                                                                                                       | <b>Description</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <br>(Sort column heading)                                                                                                    | Click a column heading to sort grid rows by the column value in ascending or descending order.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|  (Filter for value) and  (Filter out value) | <p>These filter icons appear when you pause next to a field value. These icons are available for all column values in the grid, and provide a quick way to add filters to the analytics.</p> <p>Click the <b>Filter for value</b> (+ magnify glass) icon to add the shown field value as a filter to all visualizations. For example, if you click to filter for the <i>Accident</i> incident type value, all visualizations will refresh to show data for incidents that belong to the <i>Accident</i> type.</p> <p>Click the <b>Filter out value</b> (- magnify glass) icon to remove the shown field value from the filter process for all visualizations. For example, if you click to filter out the <i>Exposure</i> value in the <b>Incident Type</b> column, visualizations will refresh to show incidents for any type except <i>Exposure</i>.</p> <p>Filters can be removed from the Filters area at the top of the page.</p> |

| <b>Field or Control</b> | <b>Description</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|-------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Detail</b>           | <p>Click to access the corresponding incident in a new browser window or tab.</p> <p>See <a href="#">Entering Health and Safety Incident Details</a>.</p> <hr/> <p><b>Note:</b> If you update the incident information of an employee using the Incident Details or Injury Details component, you need to rebuild the index for the changes to be reflected in the analytics. However, changes will be updated in the index in real time when RTI is enabled.</p> <p>See the <b>Real Time Index for Incident Analytics Visualizations</b> section in this topic for the index that is RTI-enabled for the Incident dashboard.</p> <hr/> |
| <b>Raw or Formatted</b> | Click to export data from the grid into a .csv file format.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |

## Related Links

[Managing Health and Safety Tasks as Administrators Using Fluid](#)

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## Viewing Vaccination Insights

PeopleSoft Vaccination Analytics dashboard provides administrators the ability to view and analyze Health and Safety vaccination data using PeopleSoft Insights visualizations.

Based on user privileges, administrators can access visualizations on the Vaccination Analytics dashboard to track the progress of vaccinations in the employee population and identify trends of vaccination occurrence by vaccine.

The Vaccination Analytics dashboard built on the PeopleSoft Insights platform, which relies on an underlying analytics engine and search engine. Vaccination data that is visible on the dashboard comes from the *HC\_HS\_EMPL\_VACC\_DATA* search index.

These videos provide an overview of PeopleSoft Insights for Health and Safety:

Video: [Image Highlights, PeopleSoft HCM Update Image 37: PeopleSoft Insights for Health and Safety](#)

Video: [Image Highlights, PeopleSoft HCM Update Image 40: Employee Wellness](#)

Video: [Image Highlights, PeopleSoft HCM Update Image 41: Vaccination and Testing Tracking Analytics](#)

Video: [PeopleSoft Vaccination and Test Tracking with Analytics](#)

This topic provides an overview of how to set up the dashboard for vaccination analytics, lists common elements and controls, and discusses the Vaccination Analytics dashboard.

## Understanding PeopleSoft Insights

PeopleSoft Insights is an analytical engine that provides visual reports (visualizations) in the form of charts, tables, graphs and so on. The visualizations are based on queries that retrieve data from the PeopleSoft Search Framework.

These videos provide an overview of the PeopleSoft Insights feature:

Video: [Insights with PeopleSoft](#)

Video: [PeopleSoft HCM Insights](#)

For information on Insights dashboards, see:

- “Understanding PeopleSoft Insights” (Application Fundamentals)
- *PeopleTools Search Technology*: "Monitoring PeopleSoft Search Framework and OpenSearch" and "Working with Insights Dashboards for PeopleSoft Application Data" documentation.

## Pages Used to View Vaccination Insights

| <b>Page Name</b>                                | <b>Definition Name</b>                                  | <b>Usage</b>                                              |
|-------------------------------------------------|---------------------------------------------------------|-----------------------------------------------------------|
| <a href="#">Vaccination Analytics Tile</a>      | HC_HS_VACC_ANALYTICS_FL (this is the cref for the tile) | Access the Vaccination Analytics dashboard.               |
| <a href="#">Vaccination Analytics Dashboard</a> | PTSF_KIBANA_COMP                                        | Review and analyze vaccination data using visualizations. |

## Understanding How to Set Up Insights Dashboards for Vaccination Analytics

Before administrators can access the visualizations for vaccination data, the following steps should be performed:

1. Deploy the *HC\_HS\_EMPL\_VACC\_DATA* (Employee Vaccination Details) index.

**(PeopleTools > Search Framework > Search Admin Activity Guide > Administration > Deploy/Delete Object)**

2. Build the *HC\_HS\_EMPL\_VACC\_DATA* search index.

**(PeopleTools > Search Framework > Search Admin Activity Guide > Administration > Schedule Search Index)**

3. Deploy the *Vaccination Analytics Tile* and *Vaccination Analytics* dashboard.

**(PeopleTools > Search Framework > Administration > Deploy Insights Dashboards)**

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**Note:** The full index must be run before the dashboard can be deployed.

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4. Assign these user roles to administrators to access and view Vaccination Analytics visualizations:

- *Health and Safety ADM Fluid*, which provides access to the Vaccination Analytics tile and dashboard.
- *Health & Safety Administrator*, which provides access to vaccination data components, allowing users to view vaccination data presented on visualizations.

## Real Time Index for Vaccination Analytics Visualizations

The HC\_HS\_EMPL\_VACC\_DATA (Employee Vaccination Details) search index supports real time indexing (RTI) with PeopleTools version 8.59.13 or higher. When enabled, RTI allows real-time updates to the indexed data that is viewable in vaccination analytics.

For more information about Real Time Indexing, refer to *PeopleTools Search Technology*, "Administering Real Time Indexing."

## Related Links

"Understanding PeopleSoft Insights Using PeopleSoft Search Framework" (Application Fundamentals)

"Understanding Real Time Indexing in HCM" (Application Fundamentals)

## Common Elements and Controls

This section lists the common elements and controls that are used in Insights analytics.

For more information on working with PeopleSoft Insights and filters, see *PeopleTools Search Technology*, "Working with Insights Dashboards for PeopleSoft Application Data" documentation.

## Search and Filter Options:

**Note:** Filtering options apply to all visualizations, which allows users to drill down on all the charts at once.

| <b>Term</b>                                                                                             | <b>Definition</b>                                                                                                                                       |
|---------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------|
|  (See saved queries) | Click to save the current query text and filters that you want to reuse in the future, or select an existing query to use to update the visualizations. |
| <b>Search</b> field                                                                                     | Enter a query to filter data, if applicable.                                                                                                            |

| <b>Term</b>                                                                                                                     | <b>Definition</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|---------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  (Change all filters), and + <b>Add filter</b> | <p>Enter criteria to filter data on the visualizations. You can apply filters in a number of ways:</p> <ul style="list-style-type: none"> <li>• Enter queries in the Search field.</li> <li>• Use the + <b>Add filter</b> link to create filters using fields, operators and field values.</li> <li>• Use delivered filter fields.</li> <li>• Select a chart item from a visualization.</li> <li>• Use the filter options in the Vaccination Details grid to add or exclude items.</li> <li>• Use the legend to add or exclude items.</li> </ul> <p>Added filters are displayed next to the + <b>Add filter</b> link for reference. For example, when you click a pie chart item, such as <i>Medical Exemption</i>, the filter is automatically added to your filters list, and all visualizations are refreshed to show data for vaccinations that were declined due to medical reasons.</p> <p>Click the <b>Change all filters</b> icon for a list of actions that can be performed on <i>all</i> filters, for example, disable them temporarily, remove them permanently, or invert inclusion (show data that does not meet filter criteria). Click a filter item for a list of similar actions that can be performed on it individually.</p> |
|  (Calendar) or <b>Show dates</b>             | <p>Select a different time period for the analytics. You can enter it manually, or choose from commonly used date ranges provided the system as well as recently used selections. When a new period is selected, all visualizations are refreshed automatically to reflect that change.</p> <p>If you have selected a commonly used date range, for example, <i>This month</i>, or <i>Week to date</i>, click the <b>Show dates</b> link to view the approximate date period in relation to the current date. For example, the current date is November 1 and the selected date range is <i>Year to date</i>. Clicking the Show dates link displays ~ <i>10 months ago</i> —&gt; <i>now</i>, which indicates that the selected date range started from approximately 10 months ago and ends on the current date.</p>                                                                                                                                                                                                                                                                                                                                                                                                                             |

| <b>Term</b>                                                                                                                                    | <b>Definition</b>                                                                                                                                                                                                                                                                |
|------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Organizational Relationship, Regulatory Region, Business Unit, Department, Work Location, Job Family, Vaccine, and Vaccination Location</b> | <p>Select to filter vaccination data using these delivered filter fields.</p> <p>Selections in the <b>Regulatory Region</b> field control the values that are available in the <b>Business Unit, Department, Work Location, Job Family, and Vaccine</b> fields respectively.</p> |

## Visualization Options:

When you pause over a visualization, the Options and Legend (if applicable) icons are displayed on the top right and bottom corners respectively. Use them to inspect the chart or table and view the details of that visualization, and toggle the legend display.

| <b>Term</b>                                                                                         | <b>Definition</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|-----------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  (Options)         | <p>Click the Options icon to select one of these options:</p> <ul style="list-style-type: none"> <li>• <i>Inspect</i>: Select this option to have a slide out page appear providing the details in a grid format. You can also download data from this page.</li> <li>• <i>Maximize panel</i> or <i>Minimize</i>: Select <i>Maximize panel</i> to have the page display only this visualization in full screen. Select <i>Minimize</i> to return to the dashboard and display all visualizations.</li> </ul> |
|  (Toggle legend) | <p>Click this icon to hide or display the legend for the chart, if available.</p> <p>You can click an item in the legend to change its color, or add it as a filter (if applicable).</p>                                                                                                                                                                                                                                                                                                                     |
| Chart item (bar, pie slice, and so forth)                                                           | <p>Pause over a chart item, such as a bar item or pie slice, to view a summary of details for that item.</p> <p>Select a chart item to add a filter for it to apply to all visualizations.</p>                                                                                                                                                                                                                                                                                                               |

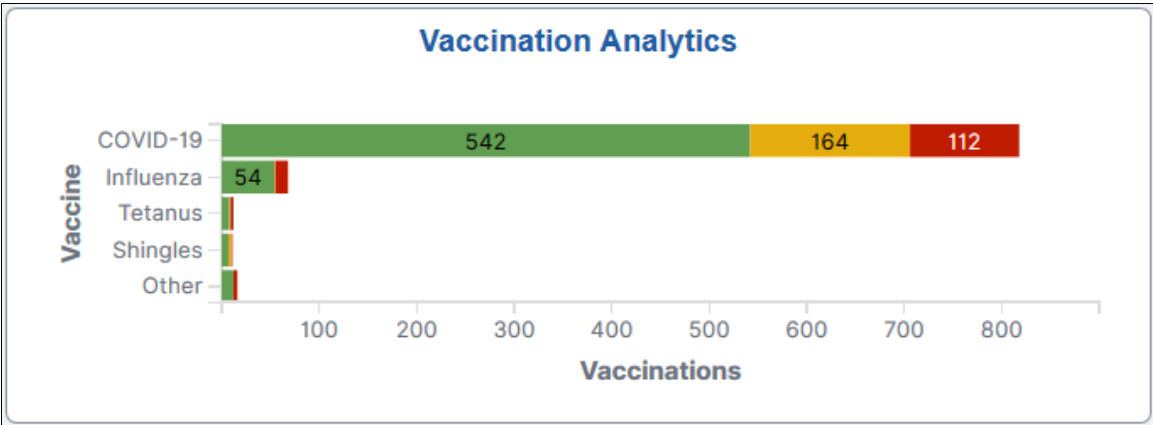
## Vaccination Analytics Tile

Use the Vaccination Analytics tile to access the Vaccination Analytics dashboard.

Navigation:

From the **Workforce Administrator** home page, select the **Manage Health and Safety** tile.

The Vaccination Analytics tile is located on the [Manage Health and Safety Dashboard](#).  
This example illustrates the Vaccination Analytics tile.



The Vaccination Analytics tile displays the **Vaccination Status by Vaccine** visualization, which gives a snapshot of the distribution of employee vaccinations by vaccine.

Click this tile to access the [Vaccination Analytics Dashboard](#) where you can use the visualizations provided to view and analyze Health and Safety vaccination data.

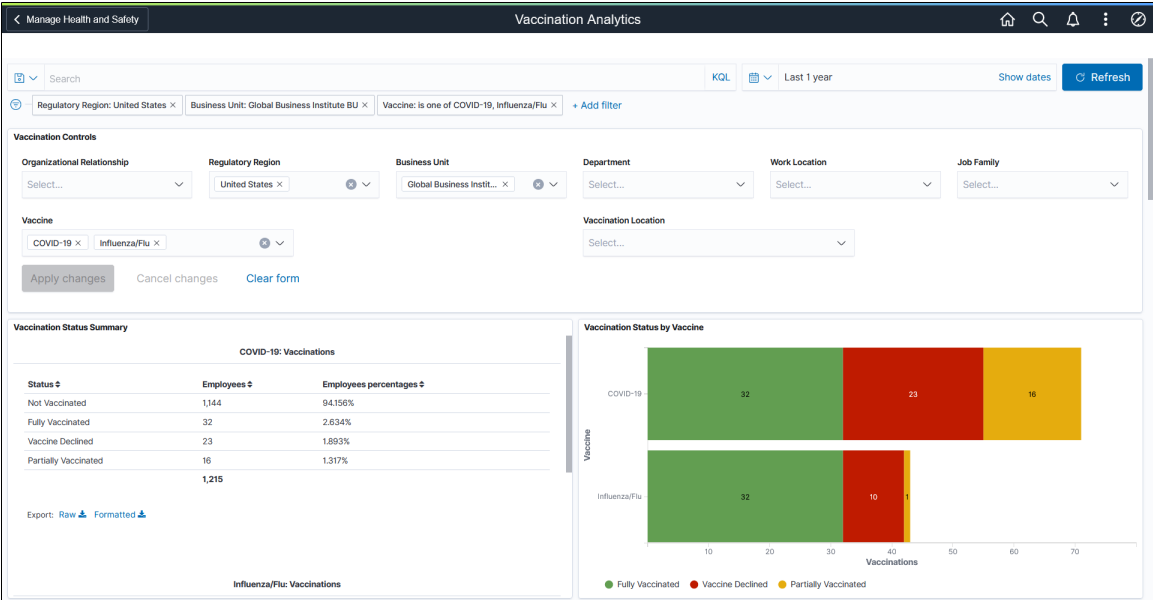
Vaccination Analytics Dashboard

Use the Vaccination Analytics dashboard to review and analyze vaccination data using visualizations.

Navigation:

Select the **Vaccination Analytics** tile.

This example illustrates the Vaccination Analytics dashboard (1 of 4).

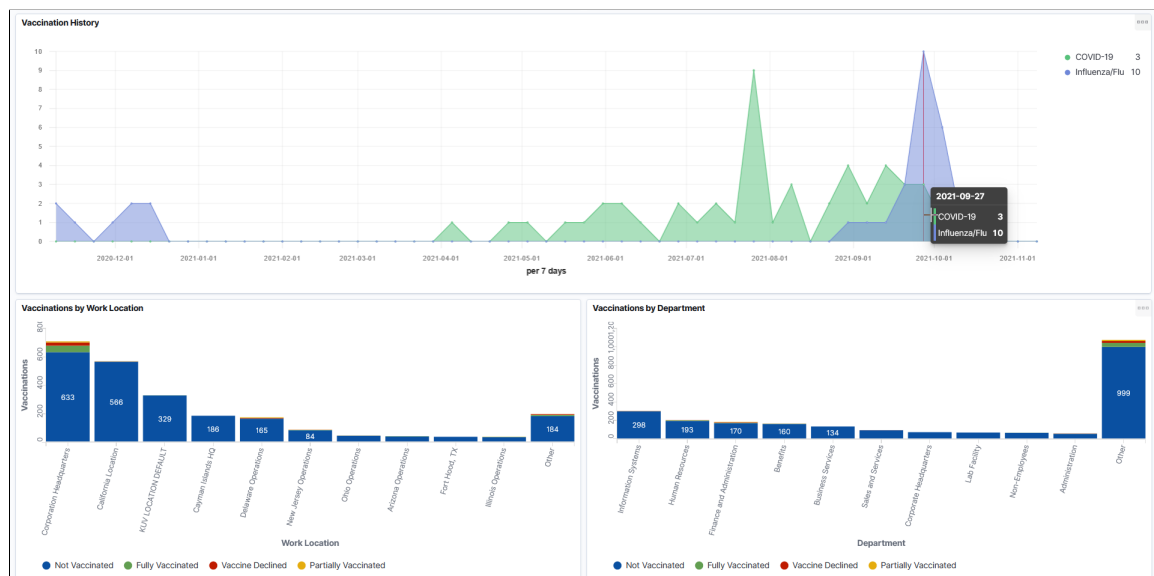




This example illustrates the Vaccination Analytics dashboard (2 of 4).



This example illustrates the Vaccination Analytics Dashboard (3 of 4).



This example illustrates the Vaccination Analytics Dashboard (4 of 4).

| Vaccination Details                                   |     |              |                          |                         |                                 |                      |                      |                                   |             |
|-------------------------------------------------------|-----|--------------|--------------------------|-------------------------|---------------------------------|----------------------|----------------------|-----------------------------------|-------------|
| Name                                                  | Age | Org Relation | Work Location            | Vaccine                 | Date                            | Vaccination Location | Vaccination Status   | Details                           | Employee ID |
| Abagail Smith                                         | 61  | Employee     | Kansas Operations        | COVID-19                | Jul 8, 2021                     | Other                | Fully Vaccinated     | <a href="#">Go to Health Card</a> | KU0130      |
| Abagail Smith                                         | 61  | Employee     | Kansas Operations        | Influenza/Flu           | Oct 9, 2021                     | Other                | Fully Vaccinated     | <a href="#">Go to Health Card</a> | KU0130      |
| Adland Chu                                            | 51  | Employee     | Corporation Headquarters | COVID-19                | Aug 31, 2021                    |                      | Vaccine Declined     | <a href="#">Go to Health Card</a> | KU0065      |
| Alan Carr                                             | 60  | Employee     | Illinois Operations      | COVID-19                | Apr 27, 2021                    |                      | Fully Vaccinated     | <a href="#">Go to Health Card</a> | KU0150      |
| Alex Passantino                                       | 54  | Employee     | Corporation Headquarters | COVID-19                | May 24, 2021                    | Other                | Fully Vaccinated     | <a href="#">Go to Health Card</a> | KU0067      |
| Alan Martin                                           | 60  | Employee     | Oklahoma                 | COVID-19                | Sep 21, 2021                    |                      | Vaccine Declined     | <a href="#">Go to Health Card</a> | KU0012      |
| Alan Martin                                           | 60  | Employee     | Oklahoma                 | Influenza/Flu           | Sep 21, 2021                    |                      | Vaccine Declined     | <a href="#">Go to Health Card</a> | KU0012      |
| Annie Mirzoyan                                        | 64  | Employee     | Delaware Operations      | COVID-19                | Sep 19, 2021                    |                      | Vaccine Declined     | <a href="#">Go to Health Card</a> | KU0077      |
| Anson Thorp                                           | 67  | Employee     | Illinois Operations      | COVID-19                | Jul 31, 2021                    |                      | Partially Vaccinated | <a href="#">Go to Health Card</a> | KU0088      |
| Benny Wong                                            | 80  | Employee     | California Location      | COVID-19                | Sep 29, 2021                    |                      | Vaccine Declined     | <a href="#">Go to Health Card</a> | KU0064      |
| Export: <a href="#">Raw</a> <a href="#">Formatted</a> |     |              |                          |                         |                                 |                      |                      |                                   |             |
| 1 2 3 4 5 ... 12 »                                    |     |              |                          |                         |                                 |                      |                      |                                   |             |
| Not Vaccinated Details                                |     |              |                          |                         |                                 |                      |                      |                                   |             |
| Name                                                  | Age | Org Relation | Work Location            | Department              | Job Title                       | Vaccine              | Vaccination Status   | Details                           | Employee ID |
| 1LT Ulysses Franklin                                  | 77  | Employee     | Fort Hood, TX            | A Co 1/15 Infantry Bn   | Infantry Platoon Leader         | COVID-19             | Not Vaccinated       | <a href="#">Go to Health Card</a> | KUHM23      |
| 1LT Ulysses Franklin                                  | 77  | Employee     | Fort Hood, TX            | A Co 1/15 Infantry Bn   | Infantry Platoon Leader         | Influenza/Flu        | Not Vaccinated       | <a href="#">Go to Health Card</a> | KUHM23      |
| 1LT Xavier Cowell                                     | 72  | Employee     | Fort Hood, TX            | A Co 1/15 Infantry Bn   | Platoon Leader                  | COVID-19             | Not Vaccinated       | <a href="#">Go to Health Card</a> | KUHM16      |
| 1LT Xavier Cowell                                     | 72  | Employee     | Fort Hood, TX            | A Co 1/15 Infantry Bn   | Platoon Leader                  | Influenza/Flu        | Not Vaccinated       | <a href="#">Go to Health Card</a> | KUHM16      |
| 1SG Russell Irvin                                     | 61  | Employee     | Ft Benning, GA           | 1/15 Infantry Battalion | Infantry Company First Sergeant | COVID-19             | Not Vaccinated       | <a href="#">Go to Health Card</a> | KUHM21      |
| 1SG Russell Irvin                                     | 61  | Employee     | Ft Benning, GA           | 1/15 Infantry Battalion | Infantry Company First Sergeant | Influenza/Flu        | Not Vaccinated       | <a href="#">Go to Health Card</a> | KUHM21      |
| 1SG William Davidson                                  | 54  | Employee     | Fort Hood, TX            | A Co 1/15 Infantry Bn   | Infantry Company 1st Sergeant   | COVID-19             | Not Vaccinated       | <a href="#">Go to Health Card</a> | KUHM17      |
| 1SG William Davidson                                  | 54  | Employee     | Fort Hood, TX            | A Co 1/15 Infantry Bn   | Infantry Company 1st Sergeant   | Influenza/Flu        | Not Vaccinated       | <a href="#">Go to Health Card</a> | KUHM17      |
| APOLLO DACHSHUND                                      | 48  | Employee     | Corporation Headquarters | President               | Chief Finance Officer           | COVID-19             | Not Vaccinated       | <a href="#">Go to Health Card</a> | KUTL100     |
| APOLLO DACHSHUND                                      | 48  | Employee     | Corporation Headquarters | President               | Chief Finance Officer           | Influenza/Flu        | Not Vaccinated       | <a href="#">Go to Health Card</a> | KUTL100     |

**Warning!** PeopleSoft Insights dashboards may not render properly if you access them using unsupported platforms.

The Vaccination Analytics dashboard provides a number of visualizations for you to view and analyze vaccination data. When you select filters or chart items, or modify the date range, PeopleSoft Insights dynamically updates all visualizations using the source from the index.

The dashboard uses role-level security to display permitted data to the user.

## Vaccination Analytics Considerations

Review these points before you begin using the Vaccination Analytics dashboard:

- By default, the Vaccination Analytics dashboard displays vaccination data for employees, contingent workers, and persons of interest (POIs). You can filter data using these values in the **Organizational Relationship** field.

For simplicity purposes, these individuals are collectively referred to as "employees" on the dashboard and in this topic.

- The dashboard displays data only for regulatory regions that have vaccine setup to support vaccination tracking.
- Each row in the **Vaccination Details** grid represents a dose that an employee took or a vaccine that they declined.

(For single-dose vaccine) The employee becomes *fully vaccinated* from the row reported for that one dose. A vaccine is considered single-dose if it is set as a 1-dose vaccine in the manufacturer setup, or does not have any manufacturer setup.

(For multi-dose vaccine) The employee becomes *fully vaccinated* from the row reported for the *last* dose of the vaccination series.

---

**Important!** When the employee has completed a vaccination series, any previous *partially vaccinated* row from the same vaccination series will be excluded automatically from the dashboard.

---

- The **Vaccination Details** and **Not Vaccinated Details** grids can show up to 500 rows of data initially, whereas the charts support the display of more than 500 rows of data.

Use filters to refine the set of reported vaccination data you wish to visualize using this dashboard. For example, filter the data by a specific regulatory region and vaccine.

If a filter field contains multiple values, the drop-down list displays the first 10 values in alphabetical order. To look up additional values, type them in the field manually (case-sensitive).

| <b>Visualization</b>                 | <b>Description</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|--------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Vaccination Status Summary</b>    | <p>For each vaccine selected or included in the Vaccination Analytics dashboard, this visualization displays a data table that shows the breakdown of employee vaccinations by these statuses (if applicable):</p> <ul style="list-style-type: none"> <li>• <i>Not Vaccinated</i>: Displays the number (and percentage of the total) of employees in the system subtracted by the number of employees who either declined or have at least one dose of the specified vaccine.</li> <li>• <i>Fully Vaccinated</i>: Displays the number (and percentage of the total) of completed, full vaccinations for the specified vaccine.</li> <li>• <i>Partially Vaccinated</i>: Displays the number (and percentage of the total) of in-progress vaccination series for the specified vaccine.</li> <li>• <i>Vaccine Declined</i>: Displays the number (and percentage of the total) of declination for the specified vaccine.</li> </ul> <p>Scroll down to view the information for all vaccines included in the dashboard.</p> |
| <b>Vaccination Status by Vaccine</b> | <p>This stacked horizontal bar chart visualization displays the numbers of vaccinations by vaccine and applicable status (<i>Fully Vaccinated</i>, <i>Partially Vaccinated</i>, and <i>Vaccine Declined</i>).</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>Vaccination Locations</b>         | <p>This stacked horizontal bar chart visualization displays the numbers of vaccinations by vaccination site (<i>Workplace</i> and <i>Other</i>) and location.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>Vaccines Declined by Reason</b>   | <p>This pie chart visualization displays the percentages of employee-declined vaccines by reason.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |

| <b>Visualization</b>                     | <b>Description</b>                                                                                                                                                                                                                                                                                                                                                                          |
|------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Vaccination Status by Age Groups</b>  | This horizontal bar chart visualization displays the distribution of vaccinations by age group and status.                                                                                                                                                                                                                                                                                  |
| <b>Vaccination Status by Current Sex</b> | This horizontal bar chart visualization displays the numbers of vaccinations by current sex and status.                                                                                                                                                                                                                                                                                     |
| <b>Vaccination History</b>               | <p>This area panel displays vaccination trends by vaccine during the specified time period.</p> <p>Pause over the X-axis to view the numbers of vaccinations by vaccine on a given date on the popup menu that appears.</p> <p>Pause over a vaccine in the legend to bring the area of that vaccine to focus. Click a vaccine in the legend to make the area of that vaccine invisible.</p> |
| <b>Vaccinations by Work Location</b>     | This stacked vertical bar chart visualization displays the numbers of vaccinations by work location and status.                                                                                                                                                                                                                                                                             |
| <b>Vaccinations by Department</b>        | This stacked vertical bar chart visualization displays the numbers of vaccinations by department and status.                                                                                                                                                                                                                                                                                |

## Vaccination Details

The **Vaccination Details** grid lists the vaccination data (presented in visualizations) in a tabular format.

| <b>Field or Control</b>                                                                                      | <b>Description</b>                                                                             |
|--------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------|
| <br>(Sort column heading) | Click a column heading to sort grid rows by the column value in ascending or descending order. |

| <b>Field or Control</b>                                                                                                                                                                                       | <b>Description</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  (Filter for value) and  (Filter out value) | <p>These filter icons appear when you pause next to a field value. These icons are available for all column values in the grid, and provide a quick way to add filters to the analytics.</p> <p>Click the <b>Filter for value</b> (+ magnify glass) icon to add the shown field value as a filter to all visualizations. For example, if you click to filter for the <i>Fully Vaccinated</i> status value, all visualizations will refresh to show data for fully-vaccinated rows.</p> <p>Click the <b>Filter out value</b> (- magnify glass) icon to remove the shown field value from the filter process for all visualizations. For example, if you click to filter out the <i>Fully Vaccinated</i> status value, all visualizations will refresh to show data for all rows except the ones that are fully vaccinated.</p> <p>Filters can be removed from the Filters area at the top of the page.</p> |
| <b>Details</b>                                                                                                                                                                                                | <p>Click the <b>Go to Health Card</b> link to access the corresponding employee health card in a new browser window or tab.</p> <p>See <a href="#">Health Card Page</a>.</p> <hr/> <p><b>Note:</b> If you update the vaccination information of an employee in the health card, you need to rebuild the index for the changes to be reflected in the analytics. However, changes will be updated in the index in real time when RTI is enabled. See the <b>Real Time Index for Vaccination Analytics Visualizations</b> section in this topic for the index that is RTI-enabled for the Vaccination dashboard.</p> <hr/>                                                                                                                                                                                                                                                                                  |
| <b>Raw or Formatted</b>                                                                                                                                                                                       | Click to export data from the grid into a .csv file format.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |

## Not Vaccinated Details

The **Not Vaccination Details** grid lists the information of employees who do not have any vaccination information for the specified vaccine in the system. The status is shown as *Not Vaccinated* for these employees in the dashboard.

## Related Links

[Managing Health and Safety Tasks as Administrators Using Fluid Reporting Vaccinations as Employees](#)

## Viewing Test Insights

PeopleSoft Test Analytics dashboard provides administrators the ability to view and analyze Health and Safety medical test data using PeopleSoft Insights visualizations.

Based on user privileges, administrators can access visualizations on the Test Analytics dashboard to monitor employees' medical test data and view testing history.

The Test Analytics dashboard is built on the PeopleSoft Insights platform, which relies on an underlying analytics engine and search engine. Medical test data that is visible on the dashboard comes from the *HC\_HS\_EMPL\_TEST\_DATA* search index.

These videos provide an overview of PeopleSoft Insights for Health and Safety:

Video: [Image Highlights, PeopleSoft HCM Update Image 37: PeopleSoft Insights for Health and Safety](#)

Video: [Image Highlights, PeopleSoft HCM Update Image 40: Employee Wellness](#)

Video: [Image Highlights, PeopleSoft HCM Update Image 41: Vaccination and Testing Tracking Analytics](#)

Video: [PeopleSoft Vaccination and Test Tracking with Analytics](#)

This topic provides an overview of how to set up the dashboard for test analytics, lists common elements and controls, and discusses the Test Analytics dashboard.

### Understanding PeopleSoft Insights

PeopleSoft Insights is an analytical engine that provides visual reports (visualizations) in the form of charts, tables, graphs and so on. The visualizations are based on queries that retrieve data from the PeopleSoft Search Framework.

These videos provide an overview of the PeopleSoft Insights feature:

Video: [Insights with PeopleSoft](#)

Video: [PeopleSoft HCM Insights](#)

For information on Insights dashboards, see:

- “Understanding PeopleSoft Insights” (Application Fundamentals)
- *PeopleTools Search Technology*: "Monitoring PeopleSoft Search Framework and OpenSearch" and "Working with Insights Dashboards for PeopleSoft Application Data" documentation.

### Pages Used to View Test Insights

| <i><b>Page Name</b></i>             | <i><b>Definition Name</b></i>                           | <i><b>Usage</b></i>                  |
|-------------------------------------|---------------------------------------------------------|--------------------------------------|
| <a href="#">Test Analytics Tile</a> | HC_HS_TEST_ANALYTICS_FL (this is the cref for the tile) | Access the Test Analytics dashboard. |

| <b>Page Name</b>                | <b>Definition Name</b> | <b>Usage</b>                                               |
|---------------------------------|------------------------|------------------------------------------------------------|
| <u>Test Analytics Dashboard</u> | PTSF_KIBANA_COMP       | Review and analyze medical test data using visualizations. |

## Understanding How to Set Up Insights Dashboards for Test Analytics

Before administrators can access the visualizations for test data, the following steps should be performed:

1. Deploy the *HC\_HS\_EMPL\_TEST\_DATA* (Employee Test Details) index.

**(PeopleTools > Search Framework > Search Admin Activity Guide > Administration > Deploy/Delete Object)**

2. Build the *HC\_HS\_EMPL\_TEST\_DATA* search index.

**(PeopleTools > Search Framework > Search Admin Activity Guide > Administration > Schedule Search Index)**

3. Deploy the *Test Analytics Tile* and *Test Analytics* dashboard.

**(PeopleTools > Search Framework > Administration > Deploy Insights Dashboards)**

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**Note:** The full index must be run before the dashboard can be deployed.

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4. Assign these user roles to administrators to access and view Test Analytics visualizations:

- *Health and Safety ADM Fluid*, which provides access to the Test Analytics tile and dashboard.
- *Health & Safety Administrator*, which provides access to medical test data components, allowing users to view medical test data presented on visualizations.

## Real Time Index for Test Analytics Visualizations

The *HC\_HS\_EMPL\_TEST\_DATA* (Employee Test Details) search index supports real time indexing (RTI) with PeopleTools version 8.59.13 or higher. When enabled, RTI allows real-time updates to the indexed data that is viewable in test analytics.

For more information about Real Time Indexing, refer to *PeopleTools Search Technology*, "Administering Real Time Indexing."

## Related Links

- “Understanding PeopleSoft Insights Using PeopleSoft Search Framework” (Application Fundamentals)
- “Understanding Real Time Indexing in HCM” (Application Fundamentals)

## Common Elements and Controls

This section lists the common elements and controls that are used in Insights analytics.

For more information on working with PeopleSoft Insights and filters, see *PeopleTools: Search Technology*, "Working with Insights Dashboards for PeopleSoft Application Data" documentation.

## Search and Filter Options:

**Note:** Filtering options apply to all visualizations, which allows users to drill down on all the charts at once.

| Term                                                                                                                            | Definition                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|---------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  (See saved queries)                           | Click to save the current query text and filters that you want to reuse in the future, or select an existing query to use to update the visualizations.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>Search</b> field                                                                                                             | Enter a query to filter data, if applicable.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|  (Change all filters), and + <b>Add filter</b> | <p>Enter criteria to filter data on the visualizations. You can apply filters in a number of ways:</p> <ul style="list-style-type: none"> <li>• Enter queries in the Search field.</li> <li>• Use the + <b>Add filter</b> link to create filters using fields, operators and field values.</li> <li>• Use delivered filter fields.</li> <li>• Select a chart item from a visualization.</li> <li>• Use the filter options in the Test Details grid to add or exclude items.</li> <li>• Use the legend to add or exclude items.</li> </ul> <p>Added filters are displayed next to the + <b>Add filter</b> link for reference. For example, when you click a bar chart item, such as <i>COVID-19</i>, the filter is automatically added to your filters list, and all visualizations are refreshed to show data pertaining to the COVID-19 test.</p> <p>Click the <b>Change all filters</b> icon for a list of actions that can be performed on <i>all</i> filters, for example, disable them temporarily, remove them permanently, or invert inclusion (show data that does not meet filter criteria). Click a filter item for a list of similar actions that can be performed on it individually.</p> |



| <b>Term</b>                                                                                                                          | <b>Definition</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|--------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  (Calendar) or <b>Show dates</b>                    | <p>Select a different time period for the analytics. You can enter it manually, or choose from commonly used date ranges provided the system as well as recently used selections. When a new period is selected, all visualizations are refreshed automatically to reflect that change.</p> <p>If you have selected a commonly used date range, for example, <i>This month</i>, or <i>Week to date</i>, click the <b>Show dates</b> link to view the approximate date period in relation to the current date. For example, the current date is November 1 and the selected date range is <i>Year to date</i>. Clicking the Show dates link displays ~ <i>10 months ago</i> —&gt; <i>now</i>, which indicates that the selected date range started from approximately 10 months ago and ends on the current date.</p> |
| <b>Organizational Relationship, Regulatory Region, Business Unit, Department, Work Location, Job Family, Test, and Test Location</b> | <p>Select to filter medical test data using these delivered filter fields.</p> <p>Selections in the <b>Regulatory Region</b> field control the values that are available in the <b>Business Unit, Department, Work Location, Job Family</b>, and <b>Test</b> fields respectively.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |

## Visualization Options:

When you pause over a visualization, the Options and Legend (if applicable) icons are displayed on the top right and bottom corners respectively. Use them to inspect the chart or table and view the details of that visualization, and toggle the legend display.

| <b>Term</b>                                                                                         | <b>Definition</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|-----------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  (Options)       | <p>Click the Options icon to select one of these options:</p> <ul style="list-style-type: none"> <li><i>Inspect</i>: Select this option to have a slide out page appear providing the details in a grid format. You can also download data from this page.</li> <li><i>Maximize panel</i> or <i>Minimize</i>: Select <i>Maximize panel</i> to have the page display this visualization in full screen. Select <i>Minimize</i> to return to the dashboard and display all visualizations.</li> </ul> |
|  (Toggle legend) | <p>Click this icon to hide or display the legend for the chart, if available.</p> <p>You can click an item in the legend to change its color, or add it as a filter (if applicable).</p>                                                                                                                                                                                                                                                                                                            |

| <b>Term</b>                               | <b>Definition</b>                                                                                                                                                                              |
|-------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Chart item (bar, pie slice, and so forth) | <p>Pause over a chart item, such as a bar item or pie slice, to view a summary of details for that item.</p> <p>Select a chart item to add a filter for it to apply to all visualizations.</p> |

## Test Analytics Tile

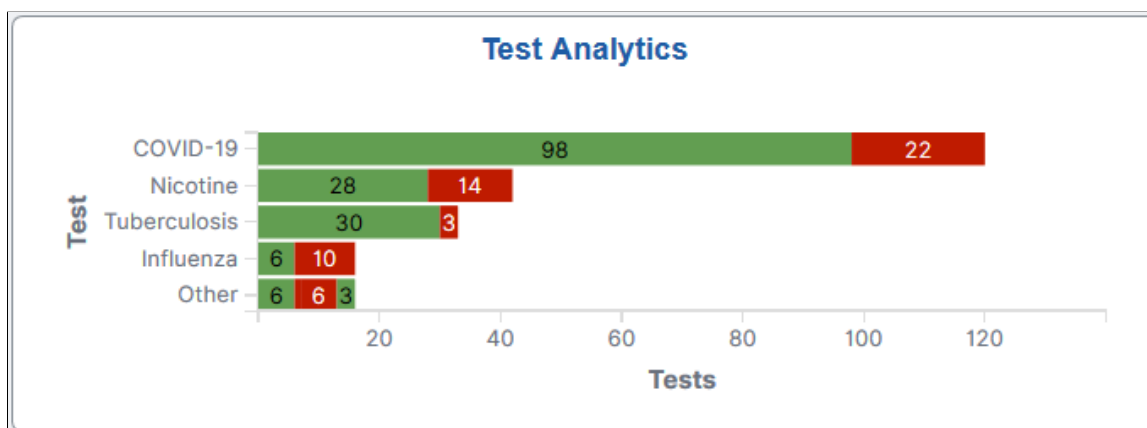
Use the Test Analytics tile to access the Test Analytics dashboard.

Navigation:

From the **Workforce Administrator** home page, select the **Manage Health and Safety** tile.

The Test Analytics tile is located on the Manage Health and Safety Dashboard.

This example illustrates the Test Analytics tile.



The Test Analytics tile displays the **Test Results by Test** visualization, which gives a snapshot of the distribution of medical test numbers by test.

Click this tile to access the Test Analytics Dashboard where you can use the visualizations provided to view and analyze Health and Safety medical test data.

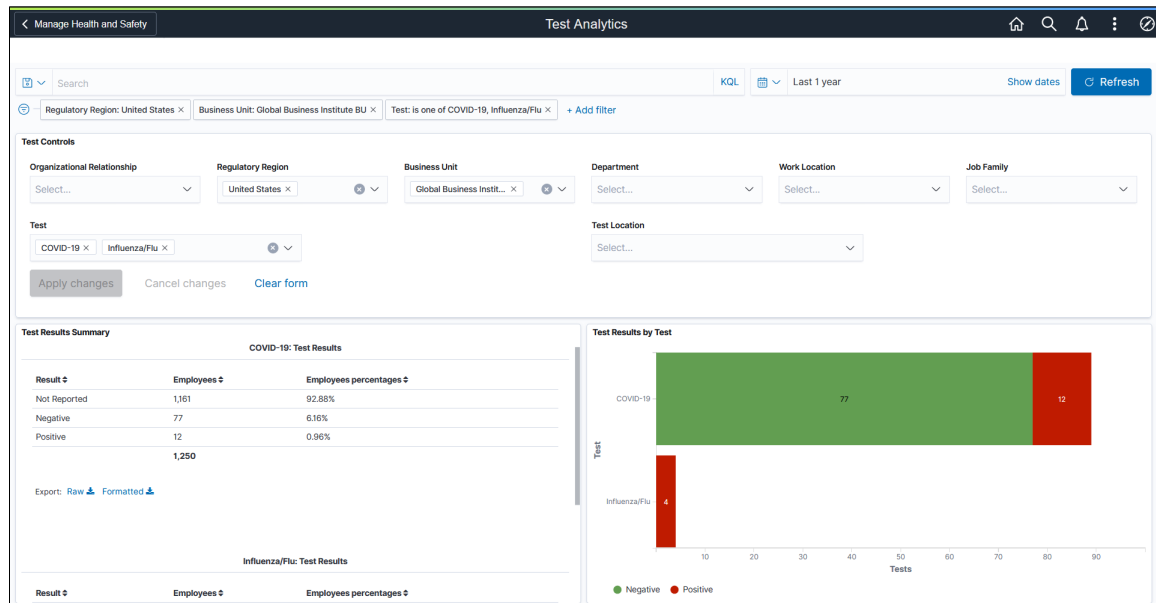
## Test Analytics Dashboard

Use the Test Analytics dashboard to review and analyze medical test data using visualizations.

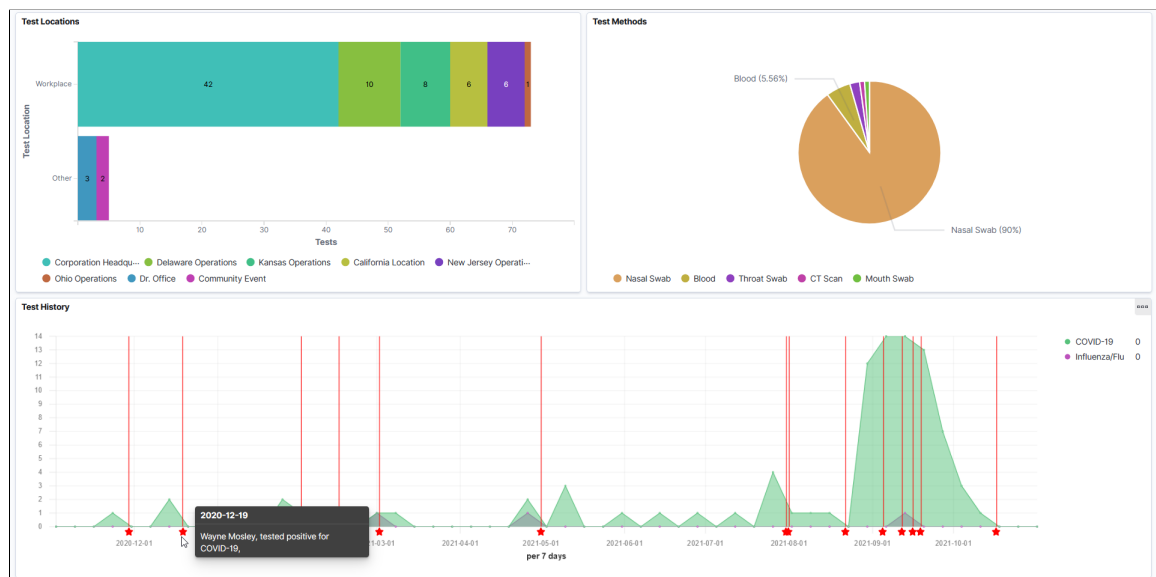
Navigation:

Select the **Test Analytics** tile.

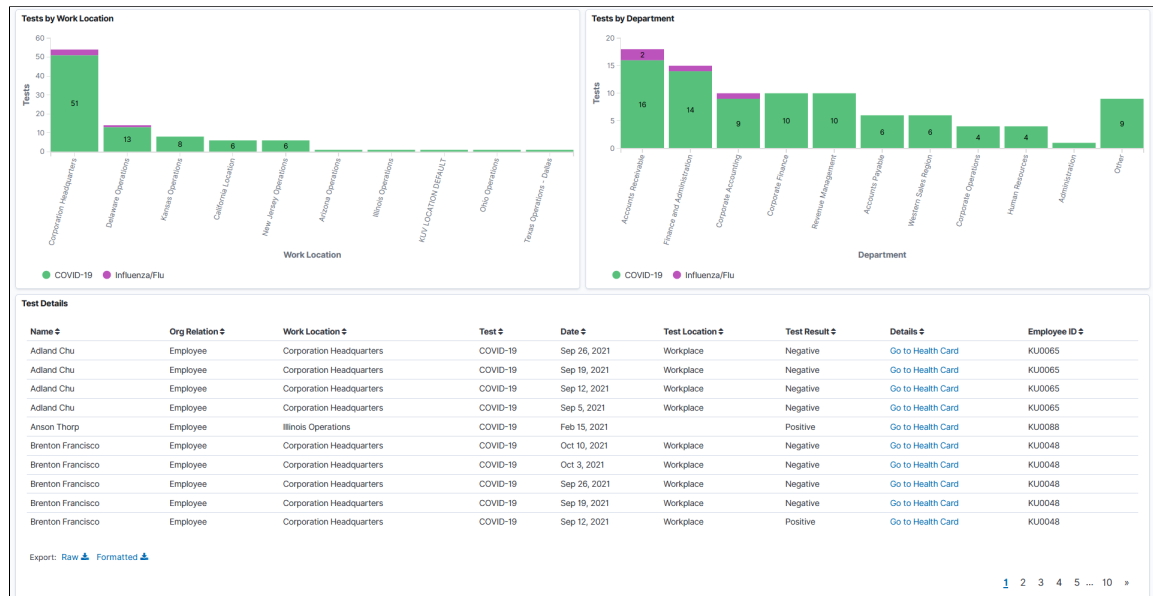
This example illustrates the Test Analytics dashboard (1 of 4).



This example illustrates the Test Analytics dashboard (2 of 4). Pause over a star to view the information of an employee who was tested positive for a test.



This example illustrates the Test Analytics Dashboard (3 of 4).



This example illustrates the Test Analytics Dashboard (4 of 4).

| Name                 | Org Relation | Work Location            | Department              | Job Title                       | Test          | Test Status  | Details                           | Employee ID |
|----------------------|--------------|--------------------------|-------------------------|---------------------------------|---------------|--------------|-----------------------------------|-------------|
| 1LT Ulysses Franklin | Employee     | Fort Hood, TX            | A Co 1/15 Infantry Bn   | Infantry Platoon Leader         | COVID-19      | Not Reported | <a href="#">Go to Health Card</a> | KUH-M23     |
| 1LT Ulysses Franklin | Employee     | Fort Hood, TX            | A Co 1/15 Infantry Bn   | Infantry Platoon Leader         | Influenza/Flu | Not Reported | <a href="#">Go to Health Card</a> | KUH-M23     |
| 1LT Xavier Cowell    | Employee     | Fort Hood, TX            | A Co 1/15 Infantry Bn   | Platoon Leader                  | COVID-19      | Not Reported | <a href="#">Go to Health Card</a> | KUH-M16     |
| 1LT Xavier Cowell    | Employee     | Fort Hood, TX            | A Co 1/15 Infantry Bn   | Platoon Leader                  | Influenza/Flu | Not Reported | <a href="#">Go to Health Card</a> | KUH-M16     |
| 1SG Russell Irvin    | Employee     | Ft Benning, GA           | 1/15 Infantry Battalion | Infantry Company First Sergeant | COVID-19      | Not Reported | <a href="#">Go to Health Card</a> | KUH-M21     |
| 1SG Russell Irvin    | Employee     | Ft Benning, GA           | 1/15 Infantry Battalion | Infantry Company First Sergeant | Influenza/Flu | Not Reported | <a href="#">Go to Health Card</a> | KUH-M21     |
| 1SG William Davidson | Employee     | Fort Hood, TX            | A Co 1/15 Infantry Bn   | Infantry Company 1st Sergeant   | COVID-19      | Not Reported | <a href="#">Go to Health Card</a> | KUH-M17     |
| 1SG William Davidson | Employee     | Fort Hood, TX            | A Co 1/15 Infantry Bn   | Infantry Company 1st Sergeant   | Influenza/Flu | Not Reported | <a href="#">Go to Health Card</a> | KUH-M17     |
| APOLLO DACHSHUND     | Employee     | Corporation Headquarters | President               | Chief Finance Officer           | COVID-19      | Not Reported | <a href="#">Go to Health Card</a> | KUTL100     |
| APOLLO DACHSHUND     | Employee     | Corporation Headquarters | President               | Chief Finance Officer           | Influenza/Flu | Not Reported | <a href="#">Go to Health Card</a> | KUTL100     |

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1 2 3 4 5 ... 111 »

**Warning!** PeopleSoft Insights dashboards may not render properly if you access them using unsupported platforms.

The Test Analytics dashboard provides a number of visualizations for you to view and analyze employees' medical test data. When you select filters or chart items, or modify the date range, PeopleSoft Insights dynamically updates all visualizations using the source from the index.

The dashboard uses role-level security to display permitted data to the user.

## Test Analytics Considerations

Review these points before you begin using the Test Analytics dashboard:

- The Test Analytics dashboard displays medical test data for employees, contingent workers, and persons of interest (POIs).

For simplicity purposes, these individuals are collectively referred to as "employees" on the dashboard and in this topic.

- The **Test Details** and **Not Reported Details** grids can show up to 500 rows of data initially, whereas the charts support the display of more than 500 rows of data.

Use filters to refine the set of medical test data you wish to visualize using this dashboard. For example, filter the data by a specific regulatory region and test.

If a filter field contains multiple values, the drop-down list displays the first 10 values in alphabetical order. To look up additional values, type them in the field manually (case-sensitive).

| <b>Visualization</b>        | <b>Description</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|-----------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Test Results Summary</b> | <p>For each medical test selected or included in the Test Analytics dashboard, this visualization displays a data table that shows the breakdown (in number and percentage of the total) of administered tests by applicable test results. Available values include, but not limited to:</p> <ul style="list-style-type: none"> <li>• <i>Not Reported</i>: Displays the number (and percentage of the total) of employees in the system subtracted by the number of employees who took the specified test.</li> <li>• <i>Negative or Not Detected</i>: Displays the number (and percentage of the total) of negative employee tests.</li> <li>• <i>Positive or Detected</i>: Displays the number (and percentage of the total) of positive employee tests.</li> </ul> <p>Scroll down to view the information for all tests included in the dashboard.</p> |
| <b>Test Results by Test</b> | <p>This stacked horizontal bar chart visualization displays the numbers of applicable test results (for example, <i>Negative</i>, <i>Positive</i>, <i>Detected</i>, and <i>Not Detected</i>) by test.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>Test Locations</b>       | <p>This stacked horizontal bar chart visualization displays the numbers of administered tests by test location (<i>Workplace</i> and <i>Other</i>) and work location.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>Test Methods</b>         | <p>This pie chart visualization displays the percentages of administered tests by test method.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |

| <b>Visualization</b>          | <b>Description</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|-------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Test History</b>           | <p>This area panel displays the medical test trends by test during the specified time period.</p> <p>Pause over the X-axis to view the numbers of test results by test on a given date on the popup menu that appears.</p> <p>Pause over a star below the X-axis to view summary information of a positive test on the popup menu that appears.</p> <p>Pause over a test in the legend to bring the area of that test to focus. Click a test in the legend to make the area of that test invisible.</p> |
| <b>Tests by Work Location</b> | This stacked vertical bar chart visualization displays the numbers of administered tests by work location and test.                                                                                                                                                                                                                                                                                                                                                                                     |
| <b>Tests by Department</b>    | This stacked vertical bar chart visualization displays the numbers of administered tests by department and test.                                                                                                                                                                                                                                                                                                                                                                                        |

## Test Details

The **Test Details** grid lists employees' medical test data (presented in visualizations) in a tabular format.

| <b>Field or Control</b>                                                                                      | <b>Description</b>                                                                             |
|--------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------|
| <br>(Sort column heading) | Click a column heading to sort grid rows by the column value in ascending or descending order. |

| <b>Field or Control</b>                                                                                                                                                                                       | <b>Description</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  (Filter for value) and  (Filter out value) | <p>These filter icons appear when you pause next to a field value. These icons are available for all column values in the grid, and provide a quick way to add filters to the analytics.</p> <p>Click the <b>Filter for value</b> (+ magnify glass) icon to add the shown field value as a filter to all visualizations. For example, if you click to filter for the <i>Workplace</i> test location value, all visualizations will refresh to show data for tests that were administered in employees' workplaces.</p> <p>Click the <b>Filter out value</b> (- magnify glass) icon to remove the shown field value from the filter process for all visualizations. For example, if you click to filter out the <i>Negative</i> test result value, all visualizations will refresh to show data for all tests except the ones that are tested negative.</p> <p>Filters can be removed from the Filters area at the top of the page.</p> |
| <b>Details</b>                                                                                                                                                                                                | <p>Click the <b>Go to Health Card</b> link to access the corresponding employee health card in a new browser window or tab.</p> <p>See <a href="#">Health Card Page</a>.</p> <hr/> <p><b>Note:</b> If you update the test information of an employee in the health card, you need to rebuild the index for the changes to be reflected in the analytics. However, changes will be updated in the index in real time when RTI is enabled.</p> <p>See the <b>Real Time Index for Test Analytics Visualizations</b> section in this topic for the index that is RTI-enabled for the Test dashboard.</p> <hr/>                                                                                                                                                                                                                                                                                                                             |
| <b>Raw or Formatted</b>                                                                                                                                                                                       | Click to export data from the grid into a .csv file format.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |

## Not Reported Details

The **Not Reported Details** grid lists the information of employees who do not have any test result information for the specified medical test in the system. The status is shown as *Not Reported* for these employees in the dashboard.

## Related Links

[Managing Health and Safety Tasks as Administrators Using Fluid](#)  
[Reporting Test Results as Employees](#)

## Approving Incidents Using Fluid Approvals

This topic describes how to approve incidents using Fluid Approvals.

### Page Used to Approve Incidents Using Fluid Approvals

| Page Name                                                | Definition Name   | Usage                                                 |
|----------------------------------------------------------|-------------------|-------------------------------------------------------|
| <a href="#">Pending Approvals - Incident Report Page</a> | EOAWMA_TXNHDTL_FL | Take approval actions on Health and Safety incidents. |

### Pending Approvals - Incident Report Page

Use the Pending Approvals - Incident Report page (EOAWMA\_TXNHDTL\_FL) to take approval actions on health and safety incidents.

Navigation:

- On the Manager Self Service home page, click the **Approvals** tile to access the Pending Approvals page. Then click an *Incident Report* transaction row on the Pending Approvals page.
- Click the push notification (or the link from an email notification) of an incident, if notifications are enabled in the setup.

This example illustrates the fields and controls on the Pending Approvals - Incident Report page.

The screenshot displays the 'Pending Approvals - Incident Report' page. At the top, there's a navigation bar with a back arrow, the page title 'Incident Report', and icons for home, search, notifications (2), and settings. Below the navigation bar, the user profile for Rosanna Channing, Senior Accounting Manager, is shown. To the right of the profile are 'Approve' and 'Pushback' buttons. The main content area is titled 'Incident Details' and contains the following information:

- Incident Number: 70000011
- Incident Type: Incident
- Description: Fell on wet pantry floor while getting coffee.
- Date: 09/10/20
- Time: 9:00AM
- Time Zone: PST

Below the incident details, there are two links: 'View Incident' (with a dropdown arrow) and 'View Incident Details'. Further down, there is an 'Approver Comments' section with a text area and a 'View' button. At the bottom, there is an 'Approval Chain' section with a right-pointing arrow.

As a Health and Safety administrator (a member of the *Health and Safety ADM Fluid* user role), you can review the summary information of an incident that you are being asked to approve on this page.

### Approval Options

The approval options on this page are common to all fluid approval transactions, as described in the documentation for the “Pending Approvals - <Transaction Details> Page” (Application Fundamentals).



| <b>Field or Control</b>      | <b>Description</b>                                                                                                                                                                                                                                                                                                                                                                                                         |
|------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Approve and Pushback</b>  | <p>Use these buttons to take action on the requested approval.</p> <p>Click the <b>Approve</b> button if you have completed the review of the incident with no further questions. Incident data will be updated in the database.</p> <p>If you need more input from the employee, click the <b>Pushback</b> button to send the incident back one level to the requester (the employee) for update.</p>                     |
| <b>View Incident Details</b> | Click to access the <a href="#">View Incident Page</a> to view additional details about the incident before taking any approval action.                                                                                                                                                                                                                                                                                    |
| <b>Approver Comments</b>     | Enter any comments related to the approval action you take.                                                                                                                                                                                                                                                                                                                                                                |
| <b>Approval Chain</b>        | <p>Click to open the Approval Chain page, where you can review information about all approvers for the transaction.</p> <hr/> <p><b>Note:</b> If you click a link in the approval chain to view the comment history of an incident that was pushed back before, the approval status of <i>Denied</i> is displayed.</p> <p>When you pushed back an incident, it is shown as denied on the Approvals History page.</p> <hr/> |

### Related Links

[Understanding Fluid Health and Safety](#)

[Reporting Incidents as Employees](#)

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## Approving Vaccinations Using Fluid Approvals

This topic describes how to approve vaccinations using Fluid Approvals.

### Page Used to Approve Vaccinations Using Fluid Approvals

| <b>Page Name</b>                                      | <b>Definition Name</b> | <b>Usage</b>                                                    |
|-------------------------------------------------------|------------------------|-----------------------------------------------------------------|
| <a href="#">Pending Approvals - Vaccinations Page</a> | EOAWMA_TXNHDTL_FL      | Take approval actions on Health and Safety vaccination entries. |

## Pending Approvals - Vaccinations Page

Use the Pending Approvals - Vaccinations page (EOAWMA\_TXNHDTL\_FL) to take approval actions on Health and Safety vaccination entries.

Navigation:

- On the Manager Self Service home page, click the **Approvals** tile to access the Pending Approvals page. Then select a row for the *Vaccinations* transaction on the Pending Approvals page.
- Click the push notification (or the link from an email notification) of a vaccination entry that is pending approval.

This example illustrates the fields and controls on the Pending Approvals - Vaccinations page.

The screenshot displays the 'Pending Approvals' page for 'Vaccinations'. At the top, the user 'Christelle Stevenson' (Manager-Accounting) is logged in. The page title is 'Vaccinations'. On the right, there are buttons for 'Approve', 'Pushback', and 'Deny'. The main section is titled 'Vaccination Details' and contains the following information:

|                      |            |
|----------------------|------------|
| Vaccine              | Covid-19   |
| Date                 | 07/01/21   |
| Manufacturer         | Moderna    |
| Dose                 | 1          |
| Lot Number           | 34534534   |
| Location             | Other      |
| Vaccination Complete | No         |
| Comments             | No address |

Below the details, there is an 'Attachments' section with a 'View Attachments' button. There is also an 'Approver Comments' text area and an 'Approval Chain' button.

As a Health and Safety administrator (a member of the *Health and Safety ADM Fluid* user role), you can review the information and any associated attachment of the vaccination entry that you are being asked to approve on this page.

### Approval Options

The approval options on this page are common to all fluid approval transactions, as described in the documentation for the “Pending Approvals - <Transaction Details> Page” (Application Fundamentals).

| <b>Field or Control</b>           | <b>Description</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|-----------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Approve, Pushback and Deny</b> | <p>Use these buttons to take action on the requested approval.</p> <p>Click the <b>Approve</b> button if you have completed the review of the vaccination entry with no further questions. After the approval, the employee's vaccination data will be updated in the database.</p> <p>If you need more input from the employee, click the <b>Pushback</b> button to send the entry back one level to the requester (the employee) for update.</p> <p>Click the <b>Deny</b> button if you do not approve the entry, for example, if the employee added it by mistake.</p> |
| <b>View Attachments</b>           | <p>Click to view the attachments inserted for the vaccination entry on the Attachments modal page.</p> <p>This link is not displayed if the entry does not have any attachments.</p>                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>Approver Comments</b>          | Enter any comments related to the approval action you take.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>Approval Chain</b>             | <p>Click to open the Approval Chain page, where you can review information about all approvers for the entry.</p> <hr/> <p><b>Note:</b> If you click a link in the approval chain to view the comment history of a vaccination entry that was pushed back before, the approval status of <i>Terminated</i> is displayed.</p> <hr/>                                                                                                                                                                                                                                        |

### Related Links

[Understanding Fluid Health and Safety](#)

[Reporting Vaccinations as Employees](#)

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## Approving Test Results Using Fluid Approvals

This topic describes how to approve test results using Fluid Approvals.

## Page Used to Approve Test Results Using Fluid Approvals

| <i>Page Name</i>                             | <i>Definition Name</i> | <i>Usage</i>                                             |
|----------------------------------------------|------------------------|----------------------------------------------------------|
| <u>Pending Approvals - Test Results Page</u> | EOAWMA_TXNHDTL_FL      | Take approval actions on Health and Safety test results. |

### Pending Approvals - Test Results Page

Use the Pending Approvals - Test Results page (EOAWMA\_TXNHDTL\_FL) to take approval actions on Health and Safety test results.

Navigation:

- On the Manager Self Service home page, click the **Approvals** tile to access the Pending Approvals page. Then select a row for the *Test Results* transaction on the Pending Approvals page.
- Click the push notification (or the link from an email notification) of a test result entry that is pending approval.

This example illustrates the fields and controls on the Pending Approvals - Test Results page.

The screenshot shows the 'Pending Approvals - Test Results' page. At the top, there's a header with a back arrow, the title 'Pending Approvals', and a sub-header 'Test Results'. On the right of the header are icons for home, search, notifications, and settings. Below the header is a user profile for 'Mei Lee, Accountant' and three buttons: 'Approve' (blue), 'Pushback' (light blue), and 'Deny' (light blue). The main content area is titled 'Test Result Details' and contains the following information:

- Test: Covid-19 Viral
- Date: 07/23/21
- Result: Negative
- Method: Nasal Swab
- Location: (empty field)

Below the test details is an 'Attachments' section with a 'View Attachments' button. There is also an 'Approver Comments' text area and an 'Approval Chain' button.

As a Health and Safety administrator (a member of the *Health and Safety ADM Fluid* user role), you can review the information and any associated attachment of the test results that you are being asked to approve on this page.

### Approval Options

The approval options on this page are common to all fluid approval transactions, as described in the documentation for the “Pending Approvals - <Transaction Details> Page” (Application Fundamentals).

| <b>Field or Control</b>           | <b>Description</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|-----------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Approve, Pushback and Deny</b> | <p>Use these buttons to take action on the requested approval.</p> <p>Click the <b>Approve</b> button if you have completed the review of the test result entry with no further questions. After the approval, the employee's test result data will be updated in the database.</p> <p>If you need more input from the employee, click the <b>Pushback</b> button to send the entry back one level to the requester (the employee) for update.</p> <p>Click the <b>Deny</b> button if you do not approve the entry, for example, if the employee added it by mistake.</p> |
| <b>View Attachments</b>           | <p>Click to view the attachments inserted for the test results on the Attachments modal page.</p> <p>This link is not displayed if the entry does not have any attachments.</p>                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>Approver Comments</b>          | Enter any comments related to the approval action you take.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>Approval Chain</b>             | <p>Click to open the Approval Chain page, where you can review information about all approvers for the entry.</p> <hr/> <p><b>Note:</b> If you click a link in the approval chain to view the comment history of a test result entry that was pushed back before, the approval status of <i>Terminated</i> is displayed.</p> <hr/>                                                                                                                                                                                                                                        |

### Related Links

[Understanding Fluid Health and Safety](#)

[Reporting Test Results as Employees](#)

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## Working with Health and Safety Activities as Employees Using Fluid

The Health and Safety tile and dashboard provide employees easy access to common health and safety tasks from a single location.

The dashboard includes fluid tiles for employees to report and track:

- Incidents.
- Vaccinations.

- Test results.
- Allergies.

For general information about fluid pages in PeopleSoft HCM, see “Understanding PeopleSoft Fluid User Interface Homepages” (Application Fundamentals).

## Delivered User Roles

The system delivers these user roles for employees to perform self-service transactions:

- *Fluid Dashboard - Employee HS*: Provides access to the Health and Safety tile and dashboard, and all the fluid self-service transactions that are available on the dashboard.
- *Health and Safety EE Fluid*: Provides access to the Health and Safety tile, which takes users directly to the fluid self-service transaction to report or review incidents.

## Pages Used to Work with Health and Safety Activities as Employees Using Fluid

| <i>Page Name</i>                   | <i>Definition Name</i>       | <i>Usage</i>                                                                                                  |
|------------------------------------|------------------------------|---------------------------------------------------------------------------------------------------------------|
| <u>Health and Safety Tile</u>      | HC_HS_EE_DASHBRD_FL_GBL_LINK | Access the Health and Safety dashboard, where employees can perform health and safety activities using tiles. |
| <u>Health and Safety Dashboard</u> | HC_HS_EE_DASHBRD_FL_GBL      | Access health and safety activities for employees using tiles.                                                |

## Health and Safety Tile

Use the Health and Safety tile to access the Health and Safety dashboard, where employees can perform health and safety activities using tiles.

Navigation:

The Health and Safety tile is delivered as part of the Employee Self-Service home page, but the location can change if you change the delivered home pages or if employees personalize their home pages.

This example illustrates the Health and Safety tile.



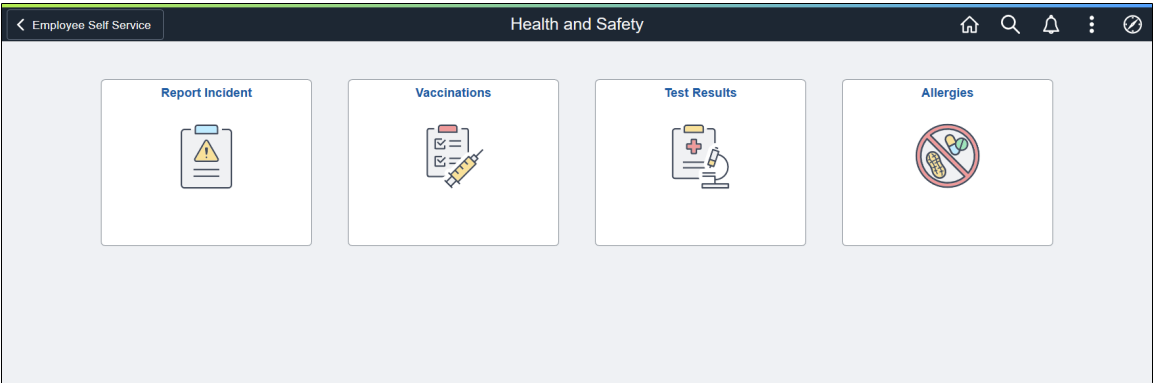
Health and Safety Dashboard

Use the Health and Safety dashboard to access health and safety activities for employees using tiles.

Navigation:

Select the Health and Safety tile.

This example illustrates the Health and Safety dashboard.



This Health and Safety dashboard enables employees to access common health and safety activities from one location.

The dashboard includes these tiles:

| Tile Name                            | Usage                                                                                                            |
|--------------------------------------|------------------------------------------------------------------------------------------------------------------|
| <a href="#">Report Incident Tile</a> | Access the <a href="#">Report Incident - My Incidents Page</a> and create or view incidents in a guided process. |

| <b>Tile Name</b>                  | <b>Usage</b>                                                                                                                   |
|-----------------------------------|--------------------------------------------------------------------------------------------------------------------------------|
| <a href="#">Vaccinations Tile</a> | Access the <a href="#">Vaccinations - Vaccine Details Page</a> and create or view the employee's own vaccination information.  |
| <a href="#">Test Results Tile</a> | Access the <a href="#">Test Results - Test Details Page</a> and create or view the employee's own test results.                |
| <a href="#">Allergies Tile</a>    | Access the <a href="#">Allergies - Allergy Details Page</a> and create, view or delete the employee's own allergy information. |

## Reporting Incidents as Employees

This topic discusses how to report health and safety incidents as employees.

**Note:** You must be a member of the *Health and Safety EE Fluid* (Health and Safety EE Fluid) role to access the Health and Safety self-service transaction in Fluid and report incidents as an employee.

## Pages Used to Report Incidents as Employees

| <b>Page Name</b>                                        | <b>Definition Name</b>       | <b>Usage</b>                                                                                     |
|---------------------------------------------------------|------------------------------|--------------------------------------------------------------------------------------------------|
| <a href="#">Report Incident Tile</a>                    | HC_HS_REPORT_INCIDENT_FL_GBL | Access the Report Incident - My Incidents page and create or view incidents in a guided process. |
| <a href="#">Report Incident - My Incidents Page</a>     | HS_INCDT_START_FL            | Create, update or delete incidents as employees.                                                 |
| <a href="#">Report Incident - Welcome Page</a>          | AGC_INFO_FL                  | Review the message prepared by your organization about the incident reporting process.           |
| <a href="#">Report Incident - Acknowledgement Page</a>  | ESIGN_FL                     | Review and agree to the terms and conditions before reporting incidents.                         |
| <a href="#">Report Incident - Report Incident Page</a>  | HS_SS_INCDRPT1_FL            | Enter incident details.                                                                          |
| <a href="#">Report Incident - Injury/Illness Page</a>   | HS_SS_INCDRPT2_FL            | Specify injury or illness details for incidents.                                                 |
| <a href="#">Report Incident - People Connected Page</a> | HS_SS_INCDRPT3_FL            | Add individuals that are associated with incidents.                                              |



| <b>Page Name</b>                                | <b>Definition Name</b> | <b>Usage</b>                                                                                          |
|-------------------------------------------------|------------------------|-------------------------------------------------------------------------------------------------------|
| <u>Report Incident - Attachments Page</u>       | HS_SS_ATTACH_FL        | Upload related documents, such as medical certificates or pictures showing the injury, for incidents. |
| <u>Report Incident - Review and Submit Page</u> | HS_SS_INCDVIEW_FL      | Review incident summary before submission.                                                            |
| <u>View Incident Page</u>                       | HS_SS_INCDVIEW_FL      | Review incident details.                                                                              |

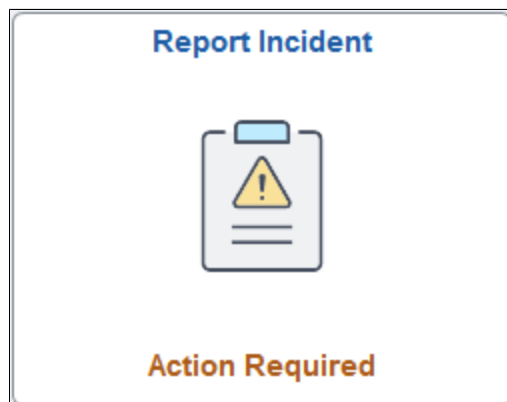
## Report Incident Tile

Use the Report Incident tile (HC\_HS\_REPORT\_INCIDENT\_FL\_GBL) to access the Report Incident - My Incidents page and create or view incidents in a guided process.

Navigation:

Access the Employee Self Service home page, or any fluid home page to which the tile has been added.

This example illustrates the Report Incident tile.




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**Note:** For employees who do not have the *Fluid Dashboard - Employee HS* user role, they can use the Health and Safety Tile to report incidents.

For more information, refer to the *Delivered User Roles* section in Working with Health and Safety Activities as Employees Using Fluid.

---

The employee can view the incident status highlight on the tile. If the employee has incidents in different statuses, the status with the highest priority order will be displayed, as shown in this list:

1. *Action Required*: Displayed when an incident is pushed back to the employee (the highest priority).
2. *In Progress*: Displayed when an incident has been created and saved, but not submitted.
3. *Submitted*: Displayed when an incident has been submitted and is pending administrator approval.

4. *<number> Incidents*: Displayed when all of the employee's incidents have been approved (approval used) or sent to the administrator for review (no approval used).

No information is displayed if the employee has not reported any incidents.

Video: [PeopleSoft Employee Health and Safety](#)

## Report Incident - My Incidents Page

Use the Report Incident - My Incidents page (HS\_INCDT\_START\_FL) to create, update or delete incidents as employees.

Navigation:

Click the Report Incident tile.

This example illustrates the fields and controls on the Report Incident - My Incidents page.

| Report Incident                  |                 |               |                                               |                            |        |           |
|----------------------------------|-----------------|---------------|-----------------------------------------------|----------------------------|--------|-----------|
| My Incidents <span>2 rows</span> |                 |               |                                               |                            |        |           |
| Incident Date                    | Incident Number | Incident Type | Description                                   | Status                     | Delete | Edit/View |
| 08/10/2021                       | 70000125        | Incident      | Fell on wet pantry floor while getting coffee | More Information Requested |        | >         |
| 08/01/2021                       | Pending         | Accident      | Had a minor accident in the parking lot       | In Progress                | 🗑️     | >         |

The Report Incident - My Incidents page displays a list of incidents you created. You can edit incidents that are saved or sent back to you for more information, delete saved incidents, or report new ones.

| Field or Control       | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Report Incident</b> | <p>Click to report a new incident for yourself. On the modal page (HS_INCDT_START_SCF) that appears, select the type of incident you want to create. Based on the incident type setup, the system displays incident types that match the regulatory region of the employee and are available for incident reporting in Self Service. As delivered, the incident type setup is applicable to all regulatory regions.</p> <p>See <a href="#">Configure Incident Types Page</a>.</p> |

## My Incidents

| <b>Field or Control</b>                                                                                    | <b>Description</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <br><br>(Action Required) | <p>Indicates that the incident (status: <i>More Information Requested</i>) is pushed back by the administrator for more update.</p> <p>Access the Review and Submit page to view approver's comments and update the incident before submitting again.</p>                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>Incident Date</b>                                                                                       | Displays the date when the incident occurred.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| <b>Incident Number</b>                                                                                     | Displays the number of the corresponding submitted incident. If the incident is saved but not yet submitted, the word <i>Pending</i> is displayed instead.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>Incident Type</b>                                                                                       | <p>Displays the incident type. The availability of an incident type is determined by its incident type configuration. Possible values include:</p> <p><i>Accident</i></p> <p><i>Contamination</i></p> <p><i>Dangerous Occurrence</i></p> <p><i>Environmental</i></p> <p><i>Exposure</i></p> <p><i>Hazardous Condition</i></p> <p><i>Illness</i></p> <p><i>Incident</i></p> <p><i>Industrial Accident</i></p> <p><i>Industrial Accident (Official)</i></p> <p><i>Injury</i></p> <p><i>Near Miss</i></p> <p><i>Safety Violation</i></p> <p><i>Unsafe Practice</i></p> <p><i>Vehicle/Equipment Accident</i></p> <p>See <a href="#">Configure Incident Types Page</a>.</p> |

| <b>Field or Control</b> | <b>Description</b>                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|-------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Description</b>      | Displays the incident description.                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>Status</b>           | <p>Displays the incident's current status.</p> <p>Values are:</p> <p><i>In Progress</i>: the incident has been created for update, and not yet submitted.</p> <p><i>More Information Requested</i>: the incident has been pushed back by the administrator.</p> <p><i>Received</i>: the incident has been submitted (no approval used), or approved (approval used).</p> <p><i>Submitted</i>: the incident has been submitted and is pending approval.</p> |
| <b>Delete</b>           | Click to delete the corresponding incident. You can only delete incidents that are currently <i>In Progress</i> .                                                                                                                                                                                                                                                                                                                                          |
| <b>Edit/View</b>        | Click to open the corresponding incident for edit.                                                                                                                                                                                                                                                                                                                                                                                                         |

## Activity Guide Composer Framework for Reporting Incidents

Employees report workplace health and safety incidents using the *Report Incident* activity guide. The left panel of the guided process displays steps for entering incident information and subsequent illness or injury details, adding people of interest, inserting related attachments, and reviewing incident summary before submitting an incident.

This topic includes discussion for all steps that come with the delivered *Health and Safety* (HSINCD1) template. The template contains these steps:

- *Report Incident* (a mandatory step in the process)
- *Injury/Illness*
- *People Connected*
- *Attachments*
- *Review and Submit* (a mandatory step in the process)

The *Health and Safety* (HANDS) category delivers additional steps that can be added to its associated templates. They are:

- *Acknowledgement*, which captures acknowledgment information from employees when they report incidents.

If implementers decide to use the *Acknowledgement* step in their processes, Oracle recommends adding it at the beginning of the process as a required step, and making subsequent steps dependent on the *Acknowledgement* step.

- *Information Only*, which can be used as a welcome step to provide getting started information about the incident reporting process.

Functional implementers have the option to reorganize or remove steps in the template configuration, or create additional templates, to support their incident reporting processes. For example, if acknowledgement is required when employees report incidents for a particular incident type, the implementer can create a new template by cloning from the *Health and Safety* template, add the Acknowledgement step to the new template, and select the new template to use for that incident type on the [Configure Incident Types Page](#).

To edit the verbiage and other configuration settings used on the Acknowledgement step, use the *HSI* acknowledgement ID on the Acknowledgement Configuration page. Administrators can also track employee acknowledgements using the Acknowledgement Framework. For more information, see “Setting Up the Acknowledgement Framework” (Enterprise Components).

This example illustrates the layout for the Report Incident pages for a medium form factor device.

**Report Incident**

Rosanna Channing  
Incident

< Previous   Next >

Save

**1 Welcome**  
Visited

**2 Acknowledgement**  
Complete

**3 Report Incident**  
Complete

**4 Injury/Illness**  
Not Started

**5 People Connected**  
Not Started

**6 Attachments**  
Not Started

**7 Review and Submit**  
Not Started

**Step 3 of 7: Report Incident**

**Incident Details**

Enter a detailed description of how the incident occurred and what activity was being performed at the time. Indicate which tools, equipment, or material were being used, if any. Specify the date and time the incident occurred.

Incident Type Incident

Description Fell on wet pantry floor while getting coffee.

\*Date 09/10/2020

Time 9:00AM

Time Zone PST

**Incident Location**

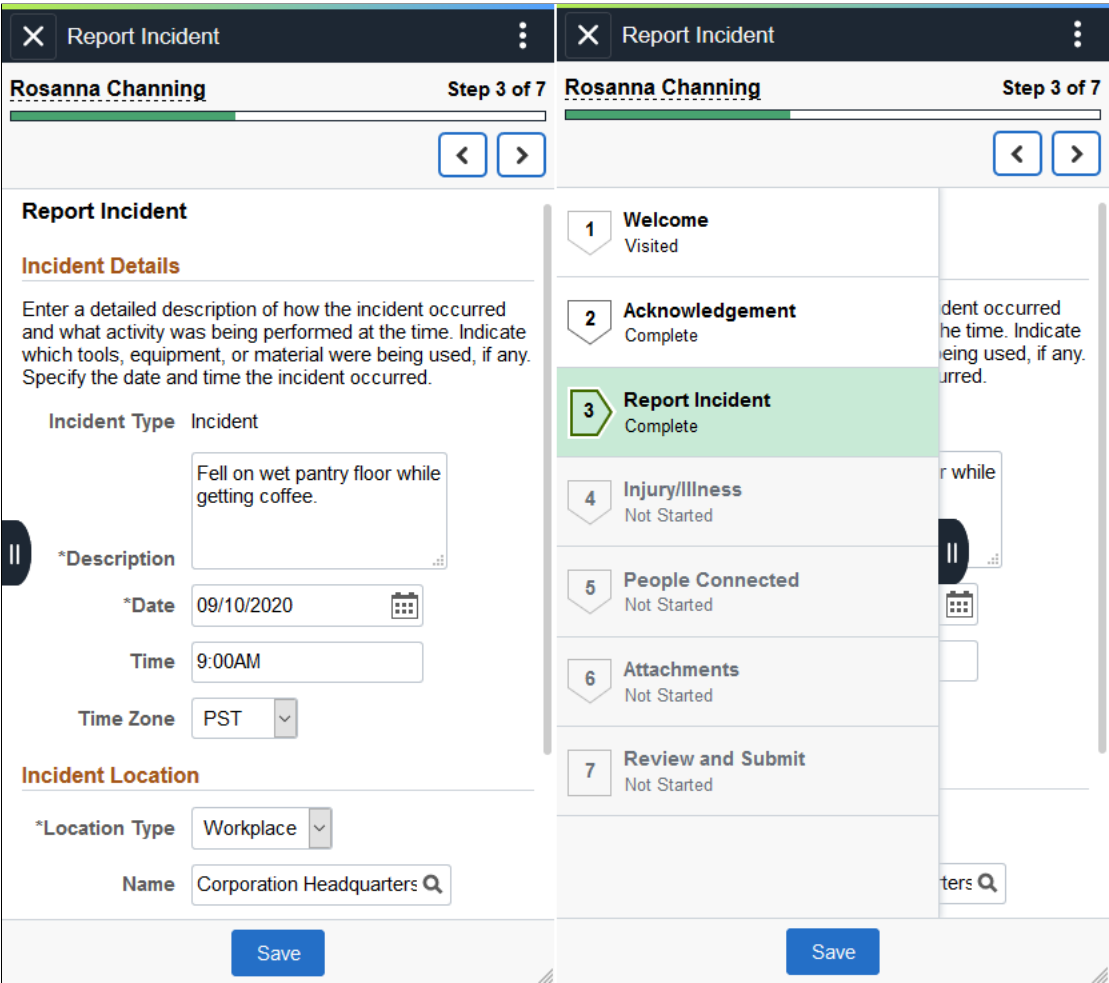
\*Location Type Workplace

Name Corporation Headquarters

Address 500 George Washington Pkway  
New York, NY 07666

Second floor pantry

This example illustrates the layout of the Report Incident pages on a small form factor device. In the first image, the left panel is hidden. In the second image, the left panel is exposed.



Page Banner

The top of PeopleSoft pages is called the page banner.

On most pages, users see the component title and the standard set of banner icon buttons.

| Field or Control | Description                                                                                                            |
|------------------|------------------------------------------------------------------------------------------------------------------------|
| Exit             | Click to exit the <i>Report Incident</i> activity guide and return to the <u>Report Incident - My Incidents Page</u> . |

Header (Sub-Banner)

A gray area under the main page banner displays contextual information that is specific to the *Report Incident* activity guide, including the person’s name, image, and action buttons.

| <b>Field or Control</b> | <b>Description</b>                                                                                                                                                                                                                                           |
|-------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Previous or Next</b> | Click to navigate to the previous or next step of the <i>Report Incident</i> activity guide.                                                                                                                                                                 |
| <b>Save</b>             | Click to save the data of the current step at any time.                                                                                                                                                                                                      |
| <b>Submit</b>           | Click to send the incident for approval (if approval is enabled) or review (if approval is not enabled). This button appears in the last step of the <i>Report Incident</i> activity guide on the <a href="#">Report Incident - Review and Submit Page</a> . |

## Left Panel

The left panel lists the steps that are included in the *Report Incident* activity guide. When you open an activity guide, the system displays the current step you are on and highlights it in the left panel. In addition to using the Previous and Next buttons to navigate between steps, you can select the desired step to access in the left panel as well.

## Related Links

“Managing Activity Guide Templates” (Enterprise Components)

## Report Incident - Welcome Page

Use the Report Incident - Welcome page (AGC\_INFO\_FL) to review the message prepared by your organization about the incident reporting process.

This example illustrates the fields and controls on the Report Incident - Welcome page.

**Step 1 of 7: Welcome**

This form is intended to report incidents, accidents, near-misses, or potentially hazardous conditions to the environment, health and safety.

**Note:** If it is an unsafe or hazardous condition posing an immediate threat to a person or to the environment, such as potential to fall from the roof top or a major chemical spill, please call your local Facilities manager immediately.

---

**Note:** Employees must be members of the *AG Composer User* role to access this page.

---

The Welcome step (Information Only step) is not part of the system-delivered template, but can be added to the template to provide employees information about the guided process before they proceed. Text and content in the Welcome step can be updated from the *Information Only* step in the template setup on the “Configure Page Text Page” (Enterprise Components).

## Report Incident - Acknowledgement Page

Use the Report Incident - Acknowledgement page (ESIGN\_FL) to review and agree to the terms and conditions before reporting incidents.

This example illustrates the fields and controls on the Report Incident - Acknowledgement page.

**Step 2 of 7: Acknowledgement**

Please read the Information Protection Policy carefully before reporting an incident. By selecting the "I Agree" checkbox you indicate that you have read and understood the policy, and acknowledge your agreement.

[Information Protection Policy](#)

☐ I Agree

[Save](#)

---

**Note:** Employees must be members of the *Acknowledgement User* role to access this page.

---

The Acknowledgement step is not part of the system-delivered template, but can be added to the template for employees to acknowledge terms and conditions before they enter any sensitive information in incidents.

## Report Incident - Report Incident Page

Use the Incident page (HS\_SS\_INCDRPT1\_FL) to enter incident details.

Navigation:

Select the Incident step from the *Report Incident* activity guide navigation, or use the Next and Previous buttons to navigate to the page.



This example illustrates the fields and controls on the Report Incident - Report Incident page.

Step 3 of 7: Report Incident

Save

Incident Details

Enter a detailed description of how the incident occurred and what activity was being performed at the time. Indicate which tools, equipment, or material were being used, if any. Specify the date and time the incident occurred.

Incident Type

Incident

Fell on wet pantry floor while getting coffee.

\*Description

\*Date

09/10/2020

Time

9:00AM

Time Zone

PST

Incident Location

\*Location Type

Workplace

Name

Corporation Headquarters

Address

500 George Washington Pkway  
New York, NY 07666

SECOND FLOOR PANTRY, BUILDING 1

Exact Location

Incident Details

| Field or Control   | Description                                                                                                                                               |
|--------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------|
| Incident Type      | Displays the type of incident selected previously.                                                                                                        |
| Description        | (Required) Describe the incident in detail.                                                                                                               |
| Date               | Specify the date when the incident occurred. By default, it is set as today's date.                                                                       |
| Time and Time Zone | Specify the time and time zone when the incident occurred. By default, your local time zone (which is specified on the My Preferences page) is displayed. |

## Incident Location

| <b>Field or Control</b> | <b>Description</b>                                                                                                                                                                                                                                                                                                     |
|-------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Location Type</b>    | <p>(Required) Select the type of location where the incident occurred.</p> <p>Values are:</p> <p><i>Offsite</i></p> <p><i>Workplace</i></p>                                                                                                                                                                            |
| <b>Add Address</b>      | Click to enter the address of the incident location. This button appears if <i>Offsite</i> is selected.                                                                                                                                                                                                                |
| <b>Name</b>             | <p>Select the workplace location where the incident occurred. The system sets your location in job data as the default value. This field appears if <i>Workplace</i> is selected.</p> <p>Locations are defined using the Location component.</p> <p>See Also “Understanding Locations” (Application Fundamentals).</p> |
| <b>Address</b>          | Displays the specified incident location address.                                                                                                                                                                                                                                                                      |
| <b>Exact Location</b>   | <p>Enter information to identify exactly where the incident occurred.</p> <p>For example, if you fell on a slippery floor in the pantry, enter something like “Second floor pantry, Building 1”.</p>                                                                                                                   |

## Report Incident - Injury/Illness Page

Use the Report Incident - Injury/Illness page (HS\_SS\_INCDRPT2\_FL) to specify injury or illness details for incidents.

Navigation:

Select the Injury/Illness step from the *Report Incident* activity guide navigation, or use the Next and Previous buttons to navigate to the page.

This example illustrates the fields and controls on the Report Incident - Injury/Illness page.

Step 4 of 7: Injury/Illness

Save

What happened as a result of the incident?

☐ No Injury/Illness

☒ Injury

☐ Illness

Injury/Illness Details

Select an illness type if applicable and enter a detailed description of the injury or illness that resulted from the incident. For example, symptoms of the illness, or the part of the body that was injured. Specify the primary treatment received.

\*Description

Several cuts from broken mug

\*Treatment Received

First Aid

Additional Details

Identify the part of the body that was affected by the injury or illness, the nature and source of it, and the manner in which it was produced.

Body Part Affected

Foot

Nature of Injury/Illness

Cut,laceration, puncture-wound

Source of Injury/Illness

Event or Exposure

What happened as a result of the incident?

Indicate if the incident results in an injury, an illness, or neither. The system refreshes this page based on your selection.

If you select **No Injury/Illness**, the rest of the page becomes blank.

Injury/Illness Details

| Field or Control   | Description                                                                           |
|--------------------|---------------------------------------------------------------------------------------|
| Illness            | Select an applicable illness type. This field is applicable to illnesses only.        |
| Description        | (Required) Describe the injury or illness in detail.                                  |
| Treatment Received | (Required) Select the primary type of treatment received as a result of the incident. |

Additional Details

Use this section to specify morel details for your injury or illness.

| <b>Field or Control</b>         | <b>Description</b>                                                                                                                                                                                                                                                                              |
|---------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Body Part Affected</b>       | <p>Select the primary body part directly affected by the injury or illness.</p> <p>Body parts are defined using the Body Part Table or Body Parts (BODY_PART_TABLE) component.</p>                                                                                                              |
| <b>Nature of Injury/Illness</b> | <p>Select the primary physical characteristics of the injury or illness, for example, puncture wound, concussion, or contact dermatitis.</p> <p>Natures of Injury are defined using the Nature Of Injury Table or Nature Of Injury (INJURY_NATURE_TBL) component.</p>                           |
| <b>Source of Injury/Illness</b> | <p>Select the primary object, equipment or factor responsible for the injury or illness, for example, powered hand tools, excessive noise, or radiating equipment.</p> <p>Sources of Injury are defined using the Source Of Injury Table or Source Of Injury (INJURY_SOURCE_TBL) component.</p> |
| <b>Event or Exposure</b>        | <p>Select the primary manner in which the injury or illness was produced, for example, struck by flying objects, or contact with electric current.</p> <p>Events or exposures are defined using the Accident Type Table or Accident Types (ACCIDENT_TYPE_TBL) component.</p>                    |

## Report Incident - People Connected Page

Use the Report Incident - People Connected page (HS\_SS\_INCDRPT3\_FL) to add individuals that are associated with incidents.

Navigation:

Select the PeopleSoft Connected step from the *Report Incident* activity guide navigation, or use the Next and Previous buttons to navigate to the page.

This example illustrates the fields and controls on the Report Incident - People Connected page.

**Step 5 of 7: People Connected**
Save

Add any individuals (for example, witnesses, bystanders, etc.) with knowledge of the incident.

**Workplace Contacts**
1 row

+

| Name                                                                                            | Role    | Comment                          |
|-------------------------------------------------------------------------------------------------|---------|----------------------------------|
|  Cynthia Adams | Witness | We went to get coffee together > |

**Other Contacts**
1 row

+

| Name     | Phone | Role  | Comment                                            |
|----------|-------|-------|----------------------------------------------------|
| Jo Smith |       | Other | Jo was stocking pantry supplies when it happened > |

| <i>Field or Control</i>      | <i>Description</i>                                                                                                                                                                                                                                                                                  |
|------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Add Workplace Contact</b> | Click to add an individual from the system (employee, person of interest, contingent worker, and so on) who is connected to the incident. On the modal page (HS_SS_PPL_EMP_SCF) that appears, select an individual, the role in the incident, and add a comment (if applicable).                    |
| <b>Add Other Contact</b>     | Click to add a person (not available in the system) who is related to the incident and maybe able to share information. On the modal page that appears, enter the person's name, the role in the incident, and add a comment (if applicable). The system stores these individuals as non-employees. |

## Report Incident - Attachments Page

Use the Report Incident - Attachments page (HS\_SS\_ATTACH\_FL) to upload related documents, such as medical certificates or pictures showing the injury, for incidents.

Navigation:

Select the Attachments step from the *Report Incident* activity guide navigation, or use the Next and Previous buttons to navigate to the page.

This example illustrates the fields and controls on the Report Incident - Attachments page.

**Step 6 of 7: Attachments**
Save

Attach any files (for example, medical documents, pictures, or videos) that pertain to the incident.

**Attachments**

Add Attachment

| Attachments     | Description                | Attached By      | Attached On          |  |
|-----------------|----------------------------|------------------|----------------------|--|
| InjuredFoot.png | Picture of my injured foot | Rosanna Channing | 09/11/20 01:18:13 PM |  |

1 row

## Report Incident - Review and Submit Page

Use the Report Incident - Review and Submit page (HS\_SS\_INCDVIEW\_FL) to review incident summary before submission.

Navigation:

Select the Review and Submit step from the *Report Incident* activity guide navigation, or use the Next and Previous buttons to navigate to the page.

This example illustrates the fields and controls on the Report Incident - Review and Submit page (1 of 2).

**Step 7 of 7: Review and Submit**

**Incident Details**

|               |                                                |           |     |
|---------------|------------------------------------------------|-----------|-----|
| Incident Type | Incident                                       |           |     |
| Description   | Fell on wet pantry floor while getting coffee. |           |     |
| Date          | 09/10/2020                                     |           |     |
| Time          | 9:00AM                                         | Time Zone | PST |

**Incident Location**

|                |                                                   |  |  |
|----------------|---------------------------------------------------|--|--|
| Location Type  | Workplace                                         |  |  |
| Name           | Corporation Headquarters                          |  |  |
| Address        | 500 George Washington Pkway<br>New York, NY 07666 |  |  |
| Exact Location | SECOND FLOOR PANTRY, BUILDING 1                   |  |  |

**Injury/Illness Details**

|                                            |                               |  |  |
|--------------------------------------------|-------------------------------|--|--|
| What happened as a result of the incident? | Injury                        |  |  |
| Description                                | Several cuts from broken mug. |  |  |
| Treatment Received                         | First Aid                     |  |  |

This example illustrates the fields and controls on the Report Incident - Review and Submit page (2 of 2).

| Additional Details                                                                              |                            |                                |                                                  |
|-------------------------------------------------------------------------------------------------|----------------------------|--------------------------------|--------------------------------------------------|
| Body Part Affected Foot                                                                         |                            |                                |                                                  |
| Nature of Injury/Illness Cut,laceration, puncture-wound                                         |                            |                                |                                                  |
| Source of Injury/Illness                                                                        |                            |                                |                                                  |
| Event or Exposure                                                                               |                            |                                |                                                  |
| People Connected                                                                                |                            |                                |                                                  |
| Workplace Contacts                                                                              |                            |                                |                                                  |
|                                                                                                 |                            |                                | 1 row                                            |
| Name                                                                                            | Role                       | Comment                        |                                                  |
|  Cynthia Adams | Witness                    | We went to get coffee together |                                                  |
| Other Contacts                                                                                  |                            |                                |                                                  |
|                                                                                                 |                            |                                | 1 row                                            |
| Name                                                                                            | Phone                      | Role                           | Comment                                          |
| Jo Smith                                                                                        |                            | Other                          | Jo was stocking pantry supplies when it happened |
| Attachments                                                                                     |                            |                                |                                                  |
|                                                                                                 |                            |                                | 1 row                                            |
| Attachments                                                                                     | Description                | Attached By                    | Attached On                                      |
| <a href="#">InjuredFoot.png</a>                                                                 | Picture of my injured foot | Rosanna Channing               | 09/11/20 01:19:01 PM                             |

This example illustrates the fields and controls on the Report Incident - Review and Submit page (3 of 3).

| Approvals                                                                                                                                                                                                                              |        |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------|
| ► Incident Report Approvals                                                                                                                                                                                                            | Denied |
| ▼ Comments                                                                                                                                                                                                                             |        |
| <p><b>Betty Locherty</b> at 09/11/20 - 3:56 PM<br/>wrong image</p> <p><b>System</b> at 09/11/20 - 3:54 PM<br/>Requester (RCHANNING) is approver on step number 1, path 1, stage 10, which has self-approval disabled! (18081,1031)</p> |        |
| ► Comment History                                                                                                                                                                                                                      |        |

Review the information you entered for the incident. Click the **Submit** button in the header area to send the incident to administrators for approval or review.

## Approvals

When you open an incident that is sent back to you for more update, the system displays this page with the Approvals section. You can review the approver's comments available in this section, and take the action needed before resubmitting the incident for approval.

**Note:** When the approver pushes back an entry (incident in this case), the status of the approval request is set to *Denied*. This is a status used in the Approval Workflow Engine (AWE), and does not apply to the transaction of the entry that has been pushed back.

## View Incident Page

Use the View Incident page (HS\_SS\_INCDVIEW\_FL) to review incident details.

## Navigation:

- Click to view a *submitted* incident on the [Report Incident - My Incidents Page](#).
- Click the View Incident Details link on the [Pending Approvals - Incident Report Page](#).

This example illustrates the fields and controls on the View Incident page (1 of 2).

**View Incident**

**Rosanna Channing**  
Senior Accounting Manager

**Incident Details**

|                 |                                                |
|-----------------|------------------------------------------------|
| Incident Number | 70000011                                       |
| Incident Type   | Incident                                       |
| Description     | Fell on wet pantry floor while getting coffee. |
| Date            | 09/10/2020                                     |
| Time            | 9:00AM                                         |
| Time Zone       | PST                                            |

**Incident Location**

|                |                                                  |
|----------------|--------------------------------------------------|
| Location Type  | Workplace                                        |
| Name           | Corporation Headquarters                         |
| Address        | 500 George Washington Pkwy<br>New York, NY 07686 |
| Exact Location | SECOND FLOOR PANTRY, BUILDING 1                  |

**Injury/Illness Details**

|                                            |                               |
|--------------------------------------------|-------------------------------|
| What happened as a result of the incident? | Injury                        |
| Description                                | Several cuts from broken mug. |
| Treatment Received                         | First Aid                     |

**Additional Details**

|                          |                                 |
|--------------------------|---------------------------------|
| Body Part Affected       | Foot                            |
| Nature of Injury/Illness | Cut, laceration, puncture-wound |
| Source of Injury/Illness |                                 |
| Event or Exposure        |                                 |

**People Connected**

This example illustrates the fields and controls on the View Incident page (2 of 2).

**Workplace Contacts** 1 row

| Name          | Role    | Comment                        |
|---------------|---------|--------------------------------|
| Cynthia Adams | Witness | We went to get coffee together |

**Other Contacts** 1 row

| Name     | Phone | Role  | Comment                                          |
|----------|-------|-------|--------------------------------------------------|
| Jo Smith |       | Other | Jo was stocking pantry supplies when it happened |

**Attachments** 1 row

| Attachments                     | Description                | Attached By      | Attached On          |
|---------------------------------|----------------------------|------------------|----------------------|
| <a href="#">InjuredFoot.png</a> | Picture of my injured foot | Rosanna Channing | 09/11/20 01:19:01 PM |

**Approvals**

**Incident Report Approvals** Pending

Pending

Multiple Approvers  
Health and Safety Admin  
09/11/20 1:20 PM

**Comments**

System at 09/11/20 - 1:20 PM  
Requester (RCHANNING) is approver on step number 1, path 1, stage 10, which has self-approval disabled! (18081,1031)



The layout of the View Incident page is the same as the [Report Incident - Review and Submit Page](#).

The Approvals section appears if the type of the incident being viewed uses AWE approval in the reporting process.

---

## Reporting Vaccinations as Employees

This topic discusses how employees add and update their vaccination information through Fluid Self-Service.

### Pages Used to Report Vaccinations as Employees

| <i><b>Page Name</b></i>                             | <i><b>Definition Name</b></i> | <i><b>Usage</b></i>                                     |
|-----------------------------------------------------|-------------------------------|---------------------------------------------------------|
| <a href="#">Vaccinations Tile</a>                   | HC_HS_SS_IMMUN_FL_GBL         | Access the page to review your vaccination information. |
| <a href="#">Vaccinations - Vaccine Details Page</a> | HS_SS_IMMUN_FL                | Review your vaccination information.                    |
| <a href="#">Add Vaccination Page</a>                | HS_SS_ADD_VACC_SCF            | Add new vaccination information.                        |
| <a href="#">Vaccine Details Page</a>                | HS_SS_IMMUN_SCF               | Enter or view your vaccination information.             |
| <a href="#">View Vaccine Details Page</a>           | HS_SS_IMMUNVIEW_FL            | View information of approved vaccination entries.       |

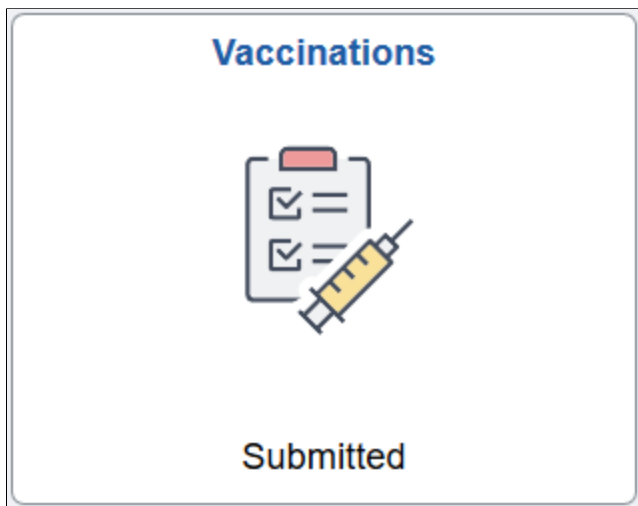
### Vaccinations Tile

Use the Vaccinations tile (HC\_HS\_SS\_IMMUN\_FL\_GBL) to access the page to review your vaccination information.

Navigation:

Access the Vaccinations tile on the [Health and Safety Dashboard](#), or any fluid home page to which the tile has been added.

This example illustrates the Vaccinations tile.



The Vaccinations tile displays information pertaining to the vaccination data that the employee has reported in the system. If multiple vaccination entries exist and they are in different statuses, the status with the highest priority order will be displayed, as shown in this list:

1. Action Required
2. Submitted

The tile does not show any information if no entries with any of these statuses are found.

## Vaccinations - Vaccine Details Page

Use the Vaccinations - Vaccine Details page (HS\_SS\_IMMUN\_FL) to review your vaccination information.

Navigation:

Click the **Vaccinations** tile on the Health and Safety dashboard.

This example illustrates the fields and controls on the Vaccinations - Vaccine Details page that is displayed on a large form factor device.

Health and Safety

Vaccinations

Betty Locherty

Finance Director

This example illustrates the fields and controls on the Vaccinations - Vaccine Details page that is displayed on a small form factor device.

**Vaccinations**

**Betty Locherty** Finance Director

**Vaccine Details**

| <b>Date</b>            | 08/27/2021        |
|------------------------|-------------------|
| <b>Vaccine</b>         | Covid-19          |
| <b>Status</b>          | Employee Declined |
| <b>Last Updated By</b> | Betty Locherty    |
| <b>Date</b>            | 08/27/2021        |
| <b>Vaccine</b>         | Tetanus           |
| <b>Status</b>          | Employee Declined |
| <b>Last Updated By</b> | Rosanna Channing  |
| <b>Date</b>            | 08/23/2021        |
| <b>Vaccine</b>         | Shingles          |
| <b>Status</b>          | Recorded          |
| <b>Last Updated By</b> |                   |

## Vaccine Details

This section displays a list of vaccinations reported by you or the administrator. The system stores recorded or approved vaccination data on the [Health Card Page](#). The administrator can use this page to create, update, or delete vaccination information for the employee as well.

| <b>Field or Control</b>                                                                                                             | <b>Description</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|-------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Add Vaccination or</b><br><br>(Add Vaccination) | Select the button to report a vaccination that you had.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <br>(Action Required)                              | <p>Indicates that the corresponding entry (status: More Information Requested) is pushed back by the administrator for more update.</p> <p>Access the <a href="#">Vaccine Details Page</a> to view approver's comments and update the entry before submitting again.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <br>(Employee Declined)                            | Indicates that you have declined taking the associated vaccine.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| <b>Date</b>                                                                                                                         | Displays the date the vaccine was given to you.<br><br>In case of declination, it shows the date you declined the vaccine.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>Vaccine</b>                                                                                                                      | Displays the name of the vaccine.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>Status</b>                                                                                                                       | <p>Displays the current status of the vaccination entry. Values are:</p> <p><i>Approved:</i> the entry has been approved by the administrator.</p> <p><i>Employee Declined:</i> the entry pertains to a vaccine that has been declined by the employee.</p> <p><i>More Information Requested:</i> the entry has been pushed back by the administrator. The employee needs to update the entry and resubmit.</p> <p><i>Recorded:</i> the entry has been saved (no approval).</p> <p><i>Request Denied:</i> the approval of the entry has been denied by the administrator.</p> <p><i>Submitted:</i> the entry has been submitted and is pending approval.</p> <p>If a row is added for the employee by the administrator, the status of <i>Recorded</i> is displayed.</p> |

| <b>Field or Control</b> | <b>Description</b>                                                                            |
|-------------------------|-----------------------------------------------------------------------------------------------|
| <b>Last Updated By</b>  | Displays the user who last updated the entry, which can be the employee or the administrator. |

## Add Vaccination Page

Use the Add Vaccination page (HS\_SS\_ADD\_VACC\_SCF) to add new vaccination information.

Navigation:

Click the **Add Vaccination** button on the [Vaccinations - Vaccine Details Page](#).

This example illustrates the fields and controls on the Add Vaccination page.

The screenshot shows the 'Add Vaccination' page. At the top, there is a header bar with a 'Cancel' button on the left and a 'Continue' button on the right. The title 'Add Vaccination' is centered in the header. Below the header, the main content area contains a label '\*Vaccine' followed by a dropdown menu. Below the dropdown menu, there is a checkbox labeled 'Decline Vaccine'.

| <b>Field or Control</b> | <b>Description</b>                                                                                                                                                                                                                                                                                                                                                                            |
|-------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Vaccine</b>          | <p>Select the vaccine that you took and would like to report.</p> <p>Vaccines are defined in the Immunization component.</p> <p>A vaccine becomes available for selection if it matches the regulatory region of the employee and is set to be available in Self Service in its setup.</p> <p>See <a href="#">Immunization Page</a> and <a href="#">Immunization - Self-Service Page</a>.</p> |
| <b>Decline Vaccine</b>  | Select to indicate that you do not wish to take the vaccine.                                                                                                                                                                                                                                                                                                                                  |

## Vaccine Details Page

Use the Vaccine Details page (HS\_SS\_IMMUN\_SCF) to enter or view vaccination information.

Navigation:

- Select **Continue** on the [Add Vaccination Page](#) to enter new vaccination information.
- Select a row on the [Vaccinations - Vaccine Details Page](#) to view the vaccination entry.
- Click the push notification or email link of a vaccination entry to view or update the entry.

This example illustrates the fields and controls on the Vaccine Details page in edit mode, when you are adding a new entry or updating an existing entry that requires more information from the administrator.

The screenshot shows the 'Vaccine Details' form with a 'Cancel' button on the top left and a 'Save' button on the top right. The form is titled 'Vaccine Covid-19'. It contains the following fields and controls:

- Date:** A text input field with a calendar icon.
- Manufacturer:** A dropdown menu.
- Dose:** A dropdown menu.
- Lot Number:** A text input field.
- Location:** A dropdown menu.
- Location Name:** A text input field.
- Comments:** A large text area with a character count of '100 characters remaining'.

Below the form, there is an **Attachments** section with the text 'You have not added any Attachments.' and an 'Add Attachment' button. Below that is an **Acknowledgement** section with a paragraph of text and a checkbox labeled 'I hereby certify that the information being submitted is true and correct to the best of my knowledge.'

This example illustrates the fields and controls on the Vaccine Details page in edit mode, when you are adding a new entry for declining a vaccine.

The screenshot shows the 'Vaccine Details' form with a 'Cancel' button on the top left and a 'Save' button on the top right. The form is titled 'Vaccine Shingles'. It contains the following fields and controls:

- Date:** A text input field with the value '07/27/2021'.
- Decline Vaccine:** A checkbox that is checked.
- Reason:** A dropdown menu with the value 'Allergic Reaction'.
- Comments:** A large text area with a character count of '100 characters remaining'.

This example illustrates the fields and controls on the Vaccine Details page in read-only mode, when the entry is recorded, submitted, approved, or denied. The vaccine shown has enabled Attachment, Acknowledgement, and Approval functionality in the setup. (1 of 2)

Vaccine Details

Vaccine Covid-19

Date 07/01/2021

Manufacturer Pfizer-BioNTech

Dose 1

Lot Number 2332L26

Location Workplace

Location Name Kansas Operations

Address 214 SW 6th Ave  
Topeka, KS 66603

Comments

Attachments

| Attachments  | Description        | Attached By    | Attached On          |
|--------------|--------------------|----------------|----------------------|
| Vaccine.docx | Vaccination record | John Patterson | 07/27/21 04:36:54 PM |

Acknowledgement

GBI is committed to protecting your privacy and ensuring that your health information is disclosed appropriately. The Privacy Policy identifies all potential uses and disclosures of your health information by our company and outlines your rights with regard to your health information. By certifying below, you acknowledge that you have updated this form accurately and understand that providing incorrect information can be dangerous to your health and others.

Yes I hereby certify that the information being submitted is true and correct to the best of my knowledge.

This example illustrates the fields and controls on the Vaccine Details page in read-only mode, when the entry is recorded, submitted, approved, or denied. The vaccine shown has enabled Attachment, Acknowledgement, and Approval functionality in the setup. (2 of 2)

Updated By:

User ID JPATTERSON

Name John Patterson

Date/Time Stamp 07/27/2021 4:36:54PM

Approvals

Vaccination Approval

Vaccination Approvals

Pending

Vaccination Approval

Pending

Multiple Approvers  
Health and Safety Admin

The setup of the selected vaccine controls the availability of fields and sections that appear on this page.

| Field or Control | Description                                                                                                                                                                                    |
|------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Vaccine          | <div>Displays the vaccine selected previously.</div> <div><b>Note:</b> Vaccine and Date fields are read-only when you update an existing entry that is pushed back by the administrator.</div> |

| <b>Field or Control</b> | <b>Description</b>                                                                                                                                                                                                                                                                                   |
|-------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Date</b>             | Enter the date you took the vaccine. Do not enter a future date.<br><br>If you choose to decline taking the selected vaccine, the system populates the current date.                                                                                                                                 |
| <b>Manufacturer</b>     | Select the manufacturer of the vaccine you took. This field appears if manufacturer information is specified in the setup of the selected vaccine, and information is set to be displayed in Self Service.                                                                                           |
| <b>Dose</b>             | Select <i>1</i> if this is a single-dose vaccine or the first dose of a multi-dose series, <i>2</i> if this is the second dose, and so on.<br>This field appears if manufacturer information is specified in the setup of the selected vaccine. It becomes editable when a manufacturer is selected. |
| <b>Lot Number</b>       | Enter the lot number of the vaccine. This field appears if manufacturer information is specified in the setup of the selected vaccine. It becomes editable when a manufacturer is selected.                                                                                                          |
| <b>Location</b>         | Select the type of location where you took the vaccine. Values are:<br><br><i>Other</i><br><br><i>Workplace</i>                                                                                                                                                                                      |
| <b>Location Name</b>    | Displays your work location by default and is editable, if <i>Workplace</i> is selected.<br><br>This field appears as a free form field if <i>Other</i> is selected.                                                                                                                                 |
| <b>Add Address</b>      | Click to enter the address of the vaccination location. This button appears if <i>Other</i> is selected.                                                                                                                                                                                             |
| <b>Address</b>          | Displays the address that you enter manually (and editable) when you select <i>Other</i> as the location, or the address of the selected location name when you select <i>Workplace</i> as the location.                                                                                             |
| <b>Decline Vaccine</b>  | Displays <i>Yes</i> if you have declined taking the vaccine.                                                                                                                                                                                                                                         |



| <b>Field or Control</b> | <b>Description</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|-------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Reason</b>           | <p>Select the reason for declining the vaccine, if the <b>Decline Vaccine</b> check box is selected. Values are:</p> <p><i>Allergic Reaction</i></p> <p><i>Medical Exemption</i></p> <p><i>Personal Reasons</i></p> <p><i>Religious Beliefs</i></p>                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>Comments</b>         | Enter comments about the vaccination, if any.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| <b>Next Due Date</b>    | <p>Displays the due date of the next vaccination. It means the next first dose if the selected vaccine is a multi-dose series.</p> <p>The field value appears if the schedule information is specified in the setup of the selected vaccine, and:</p> <ul style="list-style-type: none"> <li>• The vaccination you are reporting is either for a single-dose vaccine, or the last dose of a multi-dose series. Or,</li> <li>• The manufacturer information is not available in the vaccine setup.</li> </ul> <p>The next vaccination due date is calculated as:</p> <p>Next due date = vaccination date of the single-dose vaccine (or last dose of the multi-dose series) + vaccine schedule</p> |

## Attachments

This section appears if attachments are enabled (or required) in the setup of the selected vaccine.

| <b>Field or Control</b>            | <b>Description</b>                                                                                                                                     |
|------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Add Attachment</b>              | Select to upload supporting documents.                                                                                                                 |
| <b>Attachments</b>                 | <p>Displays the link of the uploaded attachment, if available.</p> <p>You have the option to delete attachments when you update an existing entry.</p> |
| <b>Description</b>                 | Enter the description of the attachment.                                                                                                               |
| <b>Attached By and Attached On</b> | Displays the user who uploaded the attachment and the date and time of the upload.                                                                     |

## Acknowledgement

This section appears if acknowledgements are enabled in the setup of the selected vaccine.

Select the check box to provide your acknowledgment.

## Updated By

This section appears if you are viewing an existing entry.

## Approvals

This section appears if you are viewing an existing entry and approval is enabled in the setup of the selected vaccine.

Use this section to view the approval progress of the entry.

When you open an entry that is sent back to you for more update from a push notification or an email link, the system takes you to this page to make updates. Review the approver's comments available in this section, and take the action needed before resubmitting the entry for approval.

---

**Note:** When the approver pushes back an entry, the status of the approval request is set to *Terminated*. This is a status used in the Approval Workflow Engine (AWE), and does not apply to the transaction of the entry that has been pushed back.

---

## View Vaccine Details Page

Use the View Vaccine Details page (HS\_SS\_IMMUNVIEW\_FL) to view information of approved or denied vaccination entries.

Navigation:

Click the email link that the employee received about the vaccination entry submitted, or the push notification the employee received for the entry that has been approved or denied.

This example illustrates the fields and controls on the View Vaccine Details page.

Manager Self Service

View Vaccine Details



**John Patterson**  
Manager Revenue

Vaccine: Influenza

Date: 01/01/2021

Location: Other

Comments

Next Vaccination Due: 01/01/2022

Attachments

You have not added any Attachments.

Acknowledgement

GBI is committed to protecting your privacy and ensuring that your health information is disclosed appropriately. The Privacy Policy identifies all potential uses and disclosures of your health information by our company and outlines your rights with regard to your health information. By certifying below, you acknowledge that you have updated this form accurately and understand that providing incorrect information can be dangerous to your health and others.

Yes I hereby certify that the information being submitted is true and correct to the best of my knowledge.

Updated By:

User ID: JPATTERSON

Name: John Patterson

Date/Time Stamp: 07/27/2021 5:32:18PM

Approvals

Vaccination Approval

Vaccination Approvals

Approved

Comments

Betty Locherty at 07/27/21 - 5:34 PM

approved

Comment History

John Patterson at 07/27/21 - 5:32 PM

[View History](#)

## Reporting Test Results as Employees

This topic discusses how employees add and update their test results through Fluid Self-Service.

### Pages Used to Report Test Results as Employees

| Page Name                                        | Definition Name      | Usage                                                   |
|--------------------------------------------------|----------------------|---------------------------------------------------------|
| <a href="#">Test Results Tile</a>                | HC_HS_SS_TEST_FL_GBL | Access the page to review your test result information. |
| <a href="#">Test Results - Test Details Page</a> | HS_SS_TEST_FL        | Review your test results.                               |
| <a href="#">Add Test Result Page</a>             | HS_SS_ADD_TEST_SCF   | Add new test results.                                   |
| <a href="#">Test Details Page</a>                | HS_SS_TEST_SCF       | Enter or view your test result information.             |
| <a href="#">View Test Results Page</a>           | HS_SS_TESTVIEW_FL    | View information of approved test result entries.       |

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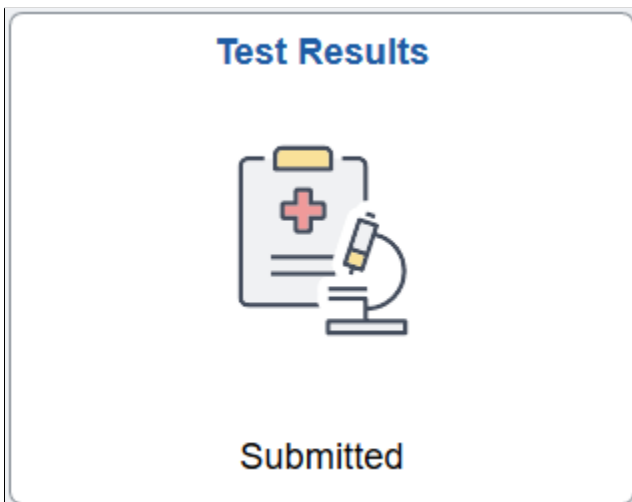
## Test Results Tile

Use the Test Results tile (HC\_HS\_SS\_TEST\_FL\_GBL) to access the page to review your test result information.

Navigation:

Access the Test Results tile on the Health and Safety Dashboard, or any fluid home page to which the tile has been added.

This example illustrates the Test Results tile.



The **Test Results** tile displays information pertaining to the test results that the employee has reported in the system. If multiple test result entries exist and they are in different statuses, the status with the highest priority order will be displayed, as shown in this list:

1. Action Required
2. Submitted

The tile does not show any status information if no entries with any of these statuses are found.

## Test Results - Test Details Page

Use the Test Results - Test Details page (HS\_SS\_TEST\_FL) to review your test results.

Navigation:

Click the **Test Results** tile on the Health and Safety dashboard.

This example illustrates the fields and controls on the Test Results - Test Details page that is displayed on a large form factor device.

Health and Safety

Test Results

 **Betty Locherty**  
Finance Director

Test Details



| Date                                                                                         | Test           | Status                     | Last Updated By |   |
|----------------------------------------------------------------------------------------------|----------------|----------------------------|-----------------|---|
| 08/02/2021                                                                                   | Influenza      | Request Denied             | Betty Locherty  | > |
| 07/05/2021                                                                                   | Cholesterol    | Recorded                   | Betty Locherty  | > |
|  06/01/2021 | Covid-19 Viral | More Information Requested | Betty Locherty  | > |

This example illustrates the fields and controls on the Test Results - Test Details page that is displayed on a small form factor device.

**Test Results**

**Betty Locherty**   
Finance Director

**Test Details**

**Date**  
08/02/2021

**Test**  
Influenza

**Status**  
Request Denied

**Last Updated By**  
Betty Locherty

**Date**  
07/05/2021

**Test**  
Cholesterol

**Status**  
Recorded

**Last Updated By**  
Betty Locherty

**Date**  
06/01/2021

**Test**  
Covid-19 Viral

**Status**  
More Information Requested

**Last Updated By**  
Betty Locherty

## Test Details

This section displays a list of test results reported by you or the administrator. The system stores recorded or approved test results on the [Health Card Page](#). The administrator can use this page to create, update, or delete test results for the employee as well.

| <b>Field or Control</b>                                                                                                             | <b>Description</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|-------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Add Test Result or</b><br><br>(Add Test Result) | Select the button to add your test results.                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <br>(Action Required)                              | Indicates that the test result row needs to be reviewed and updated. It was pushed back by the administrator in the approval process.                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Date</b>                                                                                                                         | Displays the date the test was taken.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Test</b>                                                                                                                         | Displays the name of the test.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| <b>Status</b>                                                                                                                       | Displays the current status of the test results. Values are:<br><br><i>Approved:</i> the entry has been approved by the administrator.<br><br><i>More Information Requested:</i> the entry has been pushed back by the administrator. The employee needs to update the entry and resubmit.<br><br><i>Recorded:</i> the entry has been saved (no approval).<br><br><i>Request Denied:</i> the entry has been denied by the administrator.<br><br><i>Submitted:</i> the entry has been submitted and is pending approval. |
| <b>Last Updated By</b>                                                                                                              | Displays the user who last updated the entry, which can be the employee or an administrator user (the administrator can create, update or delete test results of employees on the <a href="#">Health Card Page</a> ).                                                                                                                                                                                                                                                                                                   |

## Add Test Result Page

Use the Add Test Result page (HS\_SS\_ADD\_TEST\_SCF) to add new test results.

Navigation:

Select the Add Test Result button on the [Test Results - Test Details Page](#).

This example illustrates the fields and controls on the Add Test Result page.

Cancel

Add Test Result

Continue

\*Test

▼

| Field or Control | Description                                                                                                                                                                                                                                                                                                                                              |
|------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Test             | <p>Select the type of test to report.</p> <p>Tests are defined using the Test component (HS_TEST_TBL).</p> <p>A test becomes available for selection if it matches the regulatory region of the employee and is set to be available in Self Service in its setup.</p> <p>See <a href="#">Test Page</a> and <a href="#">Test - Self-Service Page</a>.</p> |

## Test Details Page

Use the Test Details page (HS\_SS\_TEST\_SCF) to enter or view test results.

Navigation:

- Click **Continue** on the [Add Test Result Page](#) to enter new test results.
- Select a row on the [Test Results - Test Details Page](#) to view the test result entry.
- Click the push notification or email link of a test result entry to view or update the entry.



This example illustrates the fields and controls on the Test Details page in edit mode, when you are adding a new entry or updating an existing entry that requires more information from the administrator.

Cancel

Test Details

Save

Test Covid-19 Antibody

\*Date

Result

Method

Location

Location Name

Comments 

100 characters remaining

Attachments

You have not added any Attachments.

Add Attachment

Acknowledgement

GBI is committed to protecting your privacy and ensuring that your health information is disclosed appropriately. The Privacy Policy identifies all potential uses and disclosures of your health information by our company and outlines your rights with regard to your health information. By certifying below, you acknowledge that you have updated this form accurately and understand that providing incorrect information can be dangerous to your health and others.

☐ I hereby certify that the information being submitted is true and correct to the best of my knowledge.

This example illustrates the fields and controls on the Test Details page in read-only mode, when the entry is recorded, submitted, approved, or denied. The test in display has enabled Attachment, Acknowledgement, and Approval functionality in the setup (1 of 2).

Test Details

×

Test Covid-19 Antibody

Date 07/21/2021

Result Normal

Method CT Scan

Location Other

Location Name Kaiser clinic

Comments

Attachments

1 row

| Attachments | Description             | Attached By    | Attached On          |
|-------------|-------------------------|----------------|----------------------|
| Test.docx   | Test result from doctor | John Patterson | 07/29/21 04:41:21 PM |

Acknowledgement

GBI is committed to protecting your privacy and ensuring that your health information is disclosed appropriately. The Privacy Policy identifies all potential uses and disclosures of your health information by our company and outlines your rights with regard to your health information. By certifying below, you acknowledge that you have updated this form accurately and understand that providing incorrect information can be dangerous to your health and others.

Yes ☒ I hereby certify that the information being submitted is true and correct to the best of my knowledge.

This example illustrates the fields and controls on the Test Details page in read-only mode, when the entry is recorded, submitted, approved, or denied. The test in display has enabled Attachment, Acknowledgement, and Approval functionality in the setup (2 of 2).

Updated By:

User ID JPATTERSON Name John Patterson

Date/Time Stamp 07/29/2021 4:41:20PM

Approvals

Test Approval

Test Approvals Pending

Test Approval

Pending

Multiple Approvers

Health and Safety Admin

The setup of the selected test controls the availability of fields and sections that appear on this page.

| Field or Control | Description                                                                                                                                                                                              |
|------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Test             | Displays the test selected previously.<br><br><b>Note:</b> <b>Test</b> and <b>Date</b> fields are read-only when you update an existing entry.                                                           |
| Date             | Enter the date you took the test. Do not enter a future date.                                                                                                                                            |
| Result           | Select the result of the test. Available values vary based on the setup of the selected test.                                                                                                            |
| Method           | Select the method used to perform the test. Available values vary based on the setup of the selected test.                                                                                               |
| Location         | Select the location where you took the test. Values are:<br><br><i>Other</i><br><br><i>Workplace</i>                                                                                                     |
| Location Name    | Displays your work location by default and is editable, if <i>Workplace</i> is selected.<br><br>This field appears as a free form field if <i>Other</i> is selected.                                     |
| Add Address      | Select to enter the address of the test location. This button appears if <i>Other</i> is selected.                                                                                                       |
| Address          | Displays the address that you enter manually (and editable) when you select <i>Other</i> as the location, or the address of the selected location name when you select <i>Workplace</i> as the location. |

| <b>Field or Control</b> | <b>Description</b>                                            |
|-------------------------|---------------------------------------------------------------|
| <b>Comments</b>         | Enter additional information about your test results, if any. |

## Attachments

This section appears if attachments are enabled (or required) in the setup of the selected test.

| <b>Field or Control</b>            | <b>Description</b>                                                                                                                               |
|------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Add Attachment</b>              | Select to upload any supporting documents.                                                                                                       |
| <b>Attachments</b>                 | Displays the link of the uploaded attachment, if available.<br><br>You have the option to delete the attachment when you add or update an entry. |
| <b>Description</b>                 | Enter the description of the attachment.                                                                                                         |
| <b>Attached By and Attached On</b> | Displays the user who uploaded the attachment and the date and time of the upload.                                                               |

## Acknowledgement

This section appears if acknowledgements are enabled in the setup of the selected test.

Select the check box to provide your acknowledgment.

## Updated By

This section appears if you are viewing an existing entry.

## Approvals

This section appears if you are viewing an existing entry and approval is enabled in the setup of the selected test.

Use this section to view the approval progress of the entry.

When you open an entry that is sent back to you for more update from a push notification or an email link, the system takes you to this page to make updates. Review the approver's comments available in this section, and take the action needed before resubmitting the entry for approval.

---

**Note:** When the approver pushes back an entry, the status of the approval request is set to *Terminated*. This is a status used in the Approval Workflow Engine (AWE), and does not apply to the transaction of the entry that has been pushed back.

---

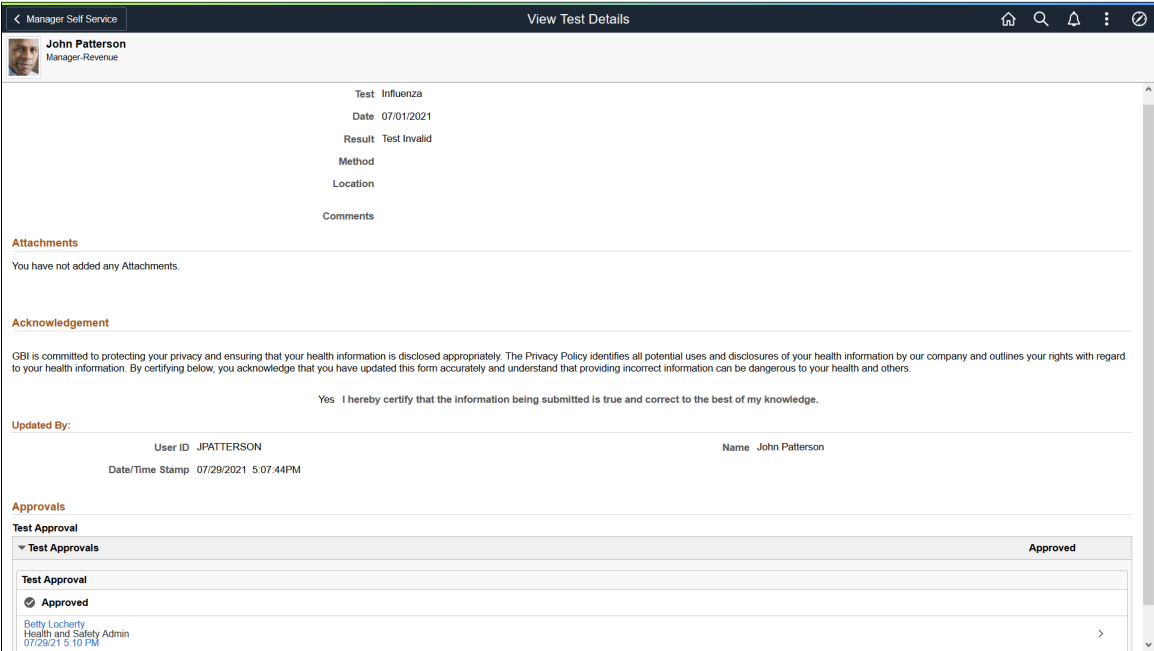
View Test Results Page

Use the View Test Results page (HS\_SS\_TESTVIEW\_FL) to view information of approved or denied test result entries.

Navigation:

Click the email link that the employee received about the test result entry submitted, or the push notification the employee received for the entry that has been approved or denied.

This example illustrates the fields and controls on the View Test Results page.



Reporting Allergies as Employees

This topic discusses how employees add and update their allergy information through Fluid Self-Service.

Pages Used to Report Allergies as Employees

| Page Name                                        | Definition Name         | Usage                                               |
|--------------------------------------------------|-------------------------|-----------------------------------------------------|
| <a href="#">Allergies Tile</a>                   | HC_HS_SS_ALLERGY_FL_GBL | Access the page to review your allergy information. |
| <a href="#">Allergies - Allergy Details Page</a> | HS_SS_ALLERGY_FL        | Review your allergy information.                    |
| <a href="#">Add Allergy Page</a>                 | HS_SS_ALLERGY_SCF       | Add, update, or delete your allergy information.    |

## Allergies Tile

Use the Allergies tile (HC\_HS\_SS\_ALLERGY\_FL\_GBL) to access the page to review your allergy information.

Navigation:

Access the Allergies tile on the Health and Safety Dashboard, or any fluid home page to which the tile has been added.

This example illustrates the Allergies tile.



## Allergies - Allergy Details Page

Use the Allergies - Allergy Details page (HS\_SS\_ALLERGY\_FL) to review your allergy information.

Navigation:

Click the **Allergies** tile on the Health and Safety dashboard.

This example illustrates the fields and controls on the Allergies - Allergy Details page that is displayed on a large form factor device.

 The screenshot shows a mobile application interface. At the top is a dark blue header bar with a back arrow, the text "Health and Safety", the title "Allergies", and icons for home, search, notifications, and settings. Below the header is a user profile section for "John Patterson" (Manager-Revenue). The main content area is titled "Allergy Details" and contains a table with two columns: "Allergy" and "Comments". There is a "+" button to add new allergies. The table lists "Animal Dander" and "Fish and Shellfish" with their respective comments and expandable arrows.
 

| Allergy            | Comments         |
|--------------------|------------------|
| Animal Dander      |                  |
| Fish and Shellfish | Shellfish mainly |

This example illustrates the fields and controls on the Allergies - Allergy Details page that is displayed on a small form factor device.

The screenshot shows a mobile application interface for "Allergies". At the top is a dark header bar with a back arrow, the title "Allergies", a bell icon, and a menu icon. Below the header is a user profile section for "John Patterson" (Manager-Revenue) with a profile picture and a dropdown arrow. The main content area is titled "Allergy Details" and contains a list of allergies. Each allergy entry has a plus icon in a box, the allergy name, and a comments section. The first entry is "Fish and Shellfish" with the comment "Shellfish mainly". The second entry is "Animal Dander" with an empty comment field. Each entry has a right-pointing chevron icon.

| Allergy Details                      |   |
|--------------------------------------|---|
|                                      |   |
| <b>Allergy</b><br>Fish and Shellfish |   |
| <b>Comments</b><br>Shellfish mainly  | > |
| <b>Allergy</b><br>Animal Dander      |   |
| <b>Comments</b>                      | > |

### Allergy Details

This section displays a list of allergies reported by you or the administrator. The system stores saved allergy data on the [Health Card Page](#). The administrator can use this page to create, update, or delete allergy information for the employee as well.

| <b>Field or Control</b>                                                                                                             | <b>Description</b>                                         |
|-------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------|
| <b>Add Allergy or</b><br><br><br><br>(Add Allergy) | Select the button to add an allergy that you have.         |
| <b>Allergy</b>                                                                                                                      | Displays the name of the allergy.                          |
| <b>Comments</b>                                                                                                                     | Displays additional information entered about the allergy. |

## Add Allergy Page

Use the Add Allergy page (HS\_SS\_ALLERGY\_SCF) to add, update, or delete your allergy information.

Navigation:

- Select the **Add Allergy** button on the Allergies page to enter new allergy information.
- Select a row on the [Allergies - Allergy Details Page](#) to view, update or delete the allergy entry.

This example illustrates the fields and controls on the Add Allergy page.

Cancel

**Add Allergy**

Save

\*Allergy

Hay Fever

Comments

100 characters remaining

| <b>Field or Control</b> | <b>Description</b>                                                                                                                                                                                                                                                                            |
|-------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Allergy</b>          | Select the allergy you would like to report.<br><br>Allergies are defined on the Allergy page (ALLERGY_TBL).<br><br>An allergy becomes available for selection if it matches the regulatory region of the employee.<br><br>This field is read-only when you update an existing allergy entry. |

| <b><i>Field or Control</i></b> | <b><i>Description</i></b>                                                                                                                   |
|--------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Comments</b>                | Enter information about your allergy, for example, severity, symptoms, or things co-workers should know when there is an allergic reaction. |
| <b>Delete</b>                  | Select to delete the allergy information. This field appears when you open an existing entry.                                               |