

PeopleSoft Human Capital Management 9.2

PeopleSoft Human Resources Monitor Health and Safety



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Preface

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*.

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. 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."

Installable PeopleSoft Online Help now includes PDF versions of each PeopleBook. For more information, see *Understanding Locally Installed PeopleSoft Online Help*.

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 three main types of common help are:

- Application Fundamentals
- Using PeopleSoft Applications
- Using and Managing the PeopleSoft Online Help

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.

Finally, *Using and Managing the PeopleSoft Online Help* (this guide) introduces you to the setup, features, and usage of the online help system.

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.

Typographical Convention	Description
<u>Key+Key</u>	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 <u>Alt+W</u> , hold down the <u>Alt</u> key while you press the <u>W</u> key.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ().
[] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.

Typographical Convention	Description
⇒	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, Country, 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.

An example of a region-specific heading is: "(Latin America) Setting Up Depreciation"

Region Identifiers

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

- Asia Pacific
- Europe
- Latin America
- North America

Country Identifiers

Countries are identified by a three-letter country code. The following are examples of country identifiers that may appear in the PeopleSoft Online Help:

- ARG (Argentina)
- AUS (Australia)
- CAN (Canada)
- NLD (The Netherlands)

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following are examples of industry identifiers that 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](#)

Application Fundamentals: HCM Abbreviations

[PeopleSoft Spotlight Series](#)

Contact Us

Send your suggestions to psoft-infodev_us@oracle.com.

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

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	Follow @PeopleSoft_Info on X.
	Read PeopleSoft Blogs
	Connect with PeopleSoft on LinkedIn

1

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 Topics

- Application Fundamentals: PeopleSoft HCM Overview

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:

Component	Component Interface	References
ACCIDN_TYPE_TBL (Accident Type Table)	ACCIDN_TYPE_TBL	See Defining Injuries and Illnesses .
DIAGNOSIS_TABLE (Diagnosis Table)	DIAGNOSIS_TABLE	See Diagnosis Table Page or Diagnosis Page or Diagnosis for Regulations Page .
HS_OCC_ILLNESS (Occupational Illnesses Table)	HS_OCC_ILLNESS	See Occupational Illnesses Table Page or Occupational Illnesses Page .
HS_TRANSPORT_TBL (Transport Table)	HS_TRANSPORT_TBL	See Transport Table Page or Transportation Page .
INJURY_NATURE_TBL (Nature Of Injury Table)	INJURY_NATURE_TBL	See Defining Injuries and Illnesses .
INJURY_SOURCE_TBL (Source Of Injury Table)	INJURY_SOURCE_TBL	See Defining Injuries and Illnesses .
JOBCODE_HAZRDS_TBL (Job Code Hazards Table)	JOBCODE_HAZRDS_TBL	See Job Code Hazards Table Page or Job Code Hazards Page .
LOCATN_HAZRDS_TBL (Location Hazards Table)	LOCATN_HAZRDS_TBL	See Location Hazards Table Page or Location Hazards Page .

Refer to the *PeopleSoft HCM 9.2 - Reorganization of Component Interface Permissions* (Doc ID 2342162.1) article on My Oracle Support 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:

Component	Component Interface	References
HS_CLAIM_MGMT (Open Claim)	CI_HS_CLAIM_MGMT	See Managing Claims .
HS_INC_VEHICLE (Vehicles/Equipment Involved)	CI_HS_INC_VEHICLE	See Entering Incident Data for Vehicles and Equipment .
HS_INCIDENT (Incident Details)	CI_HS_INCIDENT	See Entering Health and Safety Incident Details .
HS_INCIDENT_ACTION (Corrective/Preventive Actions)	CI_HS_INCIDENT_ACTION	See Tracking Consequent Actions of Incidents .
HS_INJ_ILL_REHAB (Create Employee Rehab Plan)	CI_HS_INJ_ILL_REHAB	See Tracking Rehabilitation Plans .
HS_INJURY_ILL (Injury Details)	CI_HS_INJURY_ILL	See Entering Injury Details .
HS_NE_INJILL_REHAB (Create Non-Employee Rehab Plan)	CI_HS_NE_INJILL_REHAB	See Tracking Rehabilitation Plans .
HS_NE_PERS_DATA Non-Employee Details	CI_HS_NE_PERS_DATA	See Entering Non-Employee Data .

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, and data models.

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

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 Topics

- Application Fundamentals: PeopleSoft HCM Overview

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

Page Name	Definition Name	Usage
Accident Type Table or Accident Types	ACCIDENT_TYPE_TBL	Describe the events that can result in physical occupational injuries. Use the Accident Type codes that are used on the Injury Details page, standard codes, or company-specific codes.

Page Name	Definition Name	Usage
Accident Type BRA Page	ACCID_TYPE_TBL_BRA	(BRA) Describe the events that can result in physical occupational injuries. These codes are used in the Injury Details BRA component.
Accident Type eSocial BRA Page	ACCID_TYPE_ESO_BRA	(BRA) Describe the events that can result in physical occupational injuries. These codes are used in the Injury Details BRA component.
Body Part Table or Body Parts	BODY_PART_TABLE	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> .
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> . Associate each body part with a legal code if applicable.
Nature Of Injury Table or Nature Of Injury	INJURY_NATURE_TBL	Identify types of physical injuries. These codes are used in the Injury Details component.
Nature of Injury BRA Page	INJURY_NAT_TBL_BRA	(BRA) Identify types of physical injuries. These codes are used in the Injury Details BRA component.
Source of Injury Table or Source of Injury	INJURY_SOURCE_TBL	Identify potential sources or causes of injury. These codes are used in the Injury Details component.
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.
Occupational Illnesses Table Page or Occupational Illnesses Page	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.

Page Name	Definition Name	Usage
Diagnosis Table Page or Diagnosis Page or Diagnosis for Regulations Page	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, and then **Product Related**, and then **Workforce Monitoring**, and then **Health and Safety**, and then **Accident Type BRA**, and then **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, and then **Product Related**, and then **Workforce Monitoring**, and then **Health and Safety**, and then **Accident Type eSocial BRA**, and then **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, and then **Product Related**, and then **Workforce Monitoring**, and then **Health and Safety**, and then **Nature of Injury BRA**, and then **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

The screenshot shows the 'Nature Of Injury' page with the following fields and controls:

- *Effective Date:** 01/01/2016 (with a calendar icon)
- *Status:** Active (dropdown menu)
- *Description:** Chest (Including Internal Organs)
- Short Description:** Chest
- Nature of Injury Legal Code:** 756030000

Navigation controls at the top include a search icon, a list icon, a '1 of 1' indicator, and a 'View All' link.

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

Field or Control	Description
Nature of Injury Legal Code	This code is used in eSocial reporting (S-2210 event).

Related Topics

- [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.

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**, and then **Product Related**, and then **Workforce Monitoring**, and then **Health and Safety**, and then **Occupational Illnesses Table**, and then **Occupational Illnesses Table**

- **Workforce Monitoring**, and then **Health and Safety**, and then **Define Medical Services**, and then **Occupational Illnesses**, and then **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

Field or Control	Description
Occupational Illness	You can enter different groups of occupational illness codes (maximum of 6 digits) for each setID.

(DEU) Germany

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

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**, and then **Product Related**, and then **Workforce Monitoring**, and then **Health and Safety**, and then **Diagnosis Table**, and then **Diagnosis Table**
- **Workforce Monitoring**, and then **Health and Safety**, and then **Define Medical Services**, and then **Diagnosis**, and then **Diagnosis**

- **Workforce Monitoring**, and then **Meet Regulatory Rqmts**, and then **Define Regulatory Rqmts Data**, and then **Diagnosis for Regulations**, and then **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.

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

Defining Dangerous Occurrences and Hazardous Conditions

To define dangerous occurrences and hazardous conditions, use the Dangerous Occurrences Table (HS_DANGER_OCC), Hazardous Materials Data or Hazardous Conditions/Materials (HAZ_CON_MATRL_TBL), Job Code Hazards Table (JOBCODE_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

Page Name	Definition Name	Usage
Dangerous Occurrences Table Page or Dangerous Occurrences Page	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.
Hazardous Materials Data Page or Hazardous Condition/Materials Page	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.
Job Code Hazards Table Page or Job Code Hazards Page	JOBCODE_HAZRDS_TBL	Track exposure to hazards experienced by employees in a particular job code.
Location Hazards Table Page or Location Hazards Page	LOCATN_HAZRDS_TBL	Identify exposures to hazards that have occurred at specific locations in the organization.
Hazard Units BRA Page	HAZ_UNITS_BRA	(BRA) Define hazard units.
Hazard Concepts BRA Page	HAZ_CONCEPT_BRA	(BRA) Define hazard concepts.
Work Hazards BRA Page	HAZARD_TBL_BRA	(BRA) Define codes for occupational accidents, injuries, or illnesses.
Risk Questions BRA Page	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**, and then **Product Related**, and then **Workforce Monitoring**, and then **Health and Safety**, and then **Dangerous Occurrences Table**, and then **Dangerous Occurrences Table**

- **Workforce Monitoring**, and then **Health and Safety**, and then **Define Hazardous Environments**, and then **Dangerous Occurrences**, and then **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		1 of 1	View All
*Effective Date	01/01/1980	*Status	Active
Description	BLASTING ACCIDENT		
Short Description	BLASTING		
Comments	BLASTING ACCIDENT		

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**, and then **Product Related**, and then **Workforce Monitoring**, and then **Health and Safety**, and then **Hazardous Materials Data**, and then **Hazardous Materials Data**
- **Workforce Monitoring**, and then **Health and Safety**, and then **Define Hazardous Environments**, and then **Hazardous Conditions/Materials**, and then **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

| << <

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

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

Note

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

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**, and then **Product Related**, and then **Workforce Monitoring**, and then **Health and Safety**, and then **Job Code Hazards Table**, and then **Job Code Hazards Table**
- **Workforce Monitoring**, and then **Health and Safety**, and then **Define Hazardous Environments**, and then **Job Code Hazards**, and then **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

Job Code

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.

Reg Region (regulatory region)

Enter the regulatory region for the hazard.

Hazard ID

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

Date Reported

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

Date Removed

Enter the date when job conditions were changed.

Note

Define hazardous conditions and materials on the [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**, and then **Product Related**, and then **Workforce Monitoring**, and then **Health and Safety**, and then **Location Hazards Table**, and then **Location Hazards Table**
- **Workforce Monitoring**, and then **Health and Safety**, and then **Define Hazardous Environments**, and then **Location Hazards**, and then **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 Hazard Type field.
Date Reported	This is usually today's date, which you can change.
Date Removed	Enter the date when location conditions were changed.

Note

Define hazardous conditions and materials in the [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, and then **Health and Safety**, and then **Define Hazardous Environments**, and then **Hazard Units BRA**, and then **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, and then **Health and Safety**, and then **Define Hazardous Environments**, and then **Hazard Concepts BRA**, and then **Hazard Concepts BRA**

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

Hazard Concepts BRA

Hazard Concept

HC00000001

Concept Details

Q

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	▼	+ −
2	2	HC001 CONCEPT TYPE 012	HC SH 12	Active	▼	+ −

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, and then **Health and Safety**, and then **Define Hazardous Environments**, and then **Work Hazards BRA**, and then **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

Q

Hazard Factor

Hazard Source

Hazard Trajectory

Hazard Evaluation Type

*Evaluation Type

Quantitative

▼

Hazard Unit

03

Q

Number of Units

74341.00000

Tolerance Limit

122356.00000

Technique Used

AUDIOMETRIC

Decibel (C) (dB(C))

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> .
Hazard Unit	Select a unit of measure for the work hazard. This field appears if the evaluation type is <i>Quantitative</i> . Hazard units are defined on the Hazard Units BRA Page .
Number of Units	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> .

Field or Control	Description
Tolerance Limit	Enter worker's highest acceptable limit (for example, 37) of the work hazard.
Technique Used	Enter the technique used to measure the work hazard. This field appears if the evaluation type is <i>Quantitative</i> .
Hazard Concept and Concept	Specify the applicable hazard concept and concept type for the work hazard. These fields appear if the evaluation type is <i>Qualitative</i> . Hazard concepts are defined on the Hazard Concepts BRA Page .

Risk Questions BRA Page

Use the Risk Questions BRA page (RISK_QUESTIONS_BRA) to perform risk evaluation for work hazards.

Navigation:

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

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

The screenshot shows the 'Risk Questions BRA' page. At the top, there are two tabs: 'Work Hazards BRA' and 'Risk Questions BRA'. Below the tabs, the 'Set ID' is 'KRSI1' and the 'Hazard ID' is 'KR001'. The main content area is titled 'Additional Information' and contains a table with three rows of questions. Each row has a question text and a dropdown menu with 'Yes' selected. The questions are: 'Does exposure to the risk factor / execution of the activity constitute unhealthy work?', 'Does the exposure to the risk / activity factor constitute dangerous work?', and 'Does the exposure to the risk factor / execution of the activity require collection for special retirement purposes?'. The 'Effective Date' is '01/01/2002'.

Field or Control	Description
Tolerance Limit	Enter worker's highest acceptable limit (for example, 37) of the work hazard.
Technique Used	Enter the technique used to measure the work hazard. This field appears if the evaluation type is <i>Quantitative</i> .
Hazard Concept and Concept	Specify the applicable hazard concept and concept type for the work hazard. These fields appear if the evaluation type is <i>Qualitative</i> . Hazard concepts are defined on the Hazard Concepts BRA Page .

Work Hazards BRA | **Risk Questions BRA**

Set ID KRSI1 Hazard ID KR001

Additional Information | 1 of 1 | View All

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
Animal Table Page or Animals Involved Page	HS_ANIMAL_TBL	Identify the types of animals involved in incidents. This data is used in the Incident Details - Travel page.
Transport Table Page or Transportation Page	HS_TRANSPORT_TBL	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.

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**, and then **Product Related**, and then **Workforce Administration**, and then **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 Topics

- PeopleSoft Human Resources Administer Workforce: Handling Company Property
- PeopleSoft Human Resources Administer Company Cars: Setting Up Company Car Fleet Information

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**, and then **Product Related**, and then **Workforce Monitoring**, and then **Health and Safety**, and then **Animal Table**, and then **Animal Table**
- **Workforce Monitoring**, and then **Health and Safety**, and then **Define Accident/Injury Info**, and then **Animals Involved**, and then **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

	*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**, and then **Product Related**, and then **Workforce Monitoring**, and then **Health and Safety**, and then **Transport Table**, and then **Transport Table**
- **Workforce Monitoring**, and then **Health and Safety**, and then **Define Accident/Injury Info**, and then **Transportation**, and then **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

	*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
Disablement Type IND Page	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, and then **Product Related**, and then **Workforce Monitoring**, and then **Health and Safety**, and then **Disablement Type IND**, and then **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

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

Page Name	Definition Name	Usage
Medical Facilities Table or Medical Facilities	HS_MEDICAL_FAC	Enter hospitals and clinics and their addresses.
Laboratory Provider Page	LAB_PROVID_BRA	(BRA) Enter basic contact information for medical laboratories.
Physician Table - Name Page	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.

Page Name	Definition Name	Usage
Physician Table - Address or Physicians - Address or Physician BRA - Address Medical Register Page	HS_PHYSICIAN_DATA2 HS_PHYSICIAN_BRA	Enter addresses for doctors and other medical specialists. (BRA) Specify organ statutory information for physicians.
Laboratory Exams BRA Page	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. See Also Biological Monitor Result BRA Page .

Laboratory Provider Page

Use the Laboratory Provider page (LAB_PROVIDER_BRA) to enter basic contact information for medical laboratories.

Navigation:

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

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

Laboratory Provider

Laboratory Provider ID 001

Laboratory Provider

*Effective Date

01/01/2016

*Status

Active

*Description

KRELAB TOXICOL. DO BRASIL

*CNPJ Number

08075074900107

Telephone

12 33172330

Email Address

krelabtoxicobra@ciciano.com

Country

BRA

Brazil

Address

Street Jordão Monteiro Ferreira 555

Jardim Aparecida

SAO JOSE DOS CAMPOS Sao Paulo 12245-089

Edit Address

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

Field or Control	Description
CNPJ Number	(Required) Enter the CNPJ number of the laboratory.

Related Topics

- PeopleSoft Human Resources Administer Workforce: Understanding the CAGED Report

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**, and then **Product Related**, and then **Workforce Monitoring**, and then **Health and Safety**, and then **Physician Table**, and then **Name**
- **Set Up HCM**, and then **Product Related**, and then **Workforce Monitoring**, and then **Health and Safety**, and then **Physician BRA**, and then **Name**
- **Workforce Monitoring**, and then **Health and Safety**, and then **Define Medical Services**, and then **Physicians**, and then **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.

Name

Address

Physician ID 00000000001

*Name Format

English

▼

Edit Name

Display Name Henry Gerald

Field or Control	Description
Physician ID	The non-employee ID that is assigned to the physician appears in this field. If you choose to have the system automatically assign non-employee IDs, it assigns to the physician the number that immediately follows the one in the Last Non-Employee ID Assigned field in the Installation Table. The number first appears as 00000000000. The actual number appears after you save the information here. The system uses the same number sequence to assign non-employee IDs on both the Administer Training and Monitor Health and Safety pages. Note: 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.

Field or Control	Description
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 Topics

- [Entering Non-Employee Data](#)
This section discusses how to enter non-employee data.
- Application Fundamentals: Setting Up Implementation Defaults

Medical Register Page

Use the Medical Register page (HS_PHYSICIAN_BRA) to specify organ statutory information for physicians.

Navigation:

Set Up HCM, and then **Product Related**, and then **Workforce Monitoring**, and then **Health and Safety**, and then **Physician BRA**, and then **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

Medical Register

*Organ Statutory

CRM

▼

☐ **PCMSO Coordinator**

*Register Number

Country

BRA

Brazil

*State

SP

Q

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 - PeopleSoft Global Payroll for Brazil: Absence Entry Page 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
Organ Statutory	Select <i>CRM</i> , <i>CRO</i> , or <i>RMS</i> as the organ statutory.
PCMSO Coordinator	Select to make the physician a PCMSO coordinator. Only physicians with this option can be selected as PCMSO coordinators for ASO exams on the Biological Monitor Result BRA Page .
Register Number	Enter the valid register number of the selected organ statutory.
Country and State	Enter the country (BRA) and state where the physician's organ statutory was issued. A state is required if the selected organ statutory is <i>CRM</i> or <i>CRO</i> .
NIS/PIS	Enter the valid PIS or NIS number of the physician.
CPF National ID	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, and then **Product Related**, and then **Workforce Monitoring**, and then **Health and Safety**, and then **Laboratory Exams BRA**, and then **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](#).

Field or Control	Description
eSocial Code	Select an eSocial code to associate with the laboratory exam. eSocial codes are defined on the PeopleSoft Global Payroll for Brazil: eSocial Diagnostic Procedures Page.

Defining Work Restrictions and Modified Work Duties

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

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

Pages Used to Define Work Restrictions and Duties

Page Name	Definition Name	Usage
Work Restrictions Table or 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

Page Name	Definition Name	Usage
Workplace Table BRA Page	WORKPLACE_BRA	Define work environments.
Protection Equipment BRA Page	PROT_EQUIPMENT_BRA	Define protection equipment for individual use.
Environmental Responsible BRA - Name Page	HA_RESPONSIBLE_BRA	Enter names of individuals who evaluate work environments and conditions of workers.

Page Name	Definition Name	Usage
Environmental Responsible BRA - Address Page	HA_RESPO_ADDR_BRA	Enter addresses of individuals who evaluate work environments and conditions of workers.
Environmental Responsible BRA - Registry Data Page	HA_RESPO_REGIS_BRA	Enter registration information of individuals who evaluate work environments and conditions of workers.
Worker Conditions Page	WORKER_ENVIRON_BRA	List workplaces that are associated with workers.
Hazard Agent/IPE Page	WORKER_HAZARD_BRA	List work hazards and protection equipment that are associated with workers.
Environmental Responsible Page	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, and then **Health and Safety**, and then **Define Hazardous Environments**, and then **Workplace Table BRA**, and then **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

*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.

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

Establishments List

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

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

Service Takers List

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

Field or Control	Description
All Service Takers	Click this button if the workplace applies to all service takers that are associated with the company.
Establishment ID	If the workplace applies only to a selection of the company's service takers, enter the ID of the establishment in the Service Takers grid for the system to refine the list of available service takers to choose from for that establishment.
Service Taker	Select the applicable service taker for the workplace. Available service takers have all been reported to the Government of Brazil through eSocial. Note: Selected service takers must already be reported to the Government of Brazil through the S-1020 event.

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.

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

Related Topics

- PeopleSoft Global Payroll for Brazil: S-1060 - Workplace Table

Protection Equipment BRA Page

Use the Protection Equipment BRA page (PROT_EQUIPMENT_BRA) to define protection equipment for individual use.

Navigation:

Set Up HCM, and then **Product Related**, and then **Workforce Monitoring**, and then **Health and Safety**, and then **Protection Equipment BRA**, and then **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
Description	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.

Field or Control	Description
IPE AC (individual protection equipment approval certificate)	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. Note: Enter information in one of these fields at a minimum: IPE CA , Evaluation Document or Details .
Evaluation Document	Enter the description for the IPE from the manufacturer, if the IPE AC number is not available.
Details	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.
AC Expiration date	Enter an expiration date for the IPE, if applicable.
Provider	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, and then **Product Related**, and then **Workforce Monitoring**, and then **Health and Safety**, and then **Environment Responsible BRA**, and then **Name**

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

The screenshot shows the 'Name' tab selected in a three-tab interface (Name, Address, Registry Data). Below the tabs, the 'Responsible ID' is KR000000001. The '*Name Format' dropdown is set to 'Brazilian' with a blue 'Edit Name' link to its right. The 'Display Name' field shows '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, and then **Product Related**, and then **Workforce Monitoring**, and then **Health and Safety**, and then **Environment Responsible BRA**, and then **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, and then **Product Related**, and then **Workforce Monitoring**, and then **Health and Safety**, and then **Environment Responsible BRA**, and then **Registry Data**

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

Name	Address	Registry Data

Responsible ID	KR000000001	GONCALVES,MARINA

Registry Data

*Organ Statutory	CREA	
Organ Statutory Descr		
*Register Number	5355555	
Country	BRA	Brazil
*State	SP 	Sao Paulo
NIS/PIS	4306422222	
*CPF National ID	2906666666	

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

Worker Conditions Page

Use the Worker Conditions page (WORKER_ENVIRON_BRA) to list workplaces that are associated with workers.

Navigation:

Workforce Monitoring, and then **Health and Safety**, and then **Define Hazardous Environments**, and then **Worker Conditions BRA**, and then **Worker Conditions**

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

The screenshot displays the 'Worker Conditions' page. At the top, there are three tabs: 'Worker Conditions' (selected), 'Hazard Agent/IPE', and 'Environmental Responsible'. Below the tabs, the following information is shown:

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

The main section is titled 'Worker Conditions Details'. It contains the following fields and controls:

- *Effective Date: 10/07/2021 (with a calendar icon)
- *Status: Active (dropdown menu)
- *Workplace Location: Employer Establishment (dropdown menu)
- Workplace Code: LAB0000022 (with a search icon)
- Workplace Description: Laboratory - Campinas
- *Establishment ID: (with a search icon)
- *Performed Activities: (empty text area)

Below the 'Worker Conditions Details' section is the 'Environmental Records' section, which includes an 'Observation' field (empty text area).

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> .
Workplace Code	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. Either the workplace code or workplace description must be specified. Workplaces are defined on the Workplace Table BRA Page .
Workplace Description	Displays the description of the selected workplace code. If no workplace code is selected, enter the description manually.
Establishment ID	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.
Service Taker	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. This field appears if the selected workplace location is <i>Service Taker Establishment</i> . The field is required.
CEI/CNPJ and CEI/CNPJ Description	Enter the CEI or CNPJ number and description of the applicable service taker. These fields are displayed instead of the Service Taker 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. See Also Application Fundamentals: Products Page.
Performed Activities	Enter the activities that the worker performs on the job. This field is required.

Environmental Records

Field or Control	Description
Observation	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, and then **Health and Safety**, and then **Define Hazardous Environments**, and then **Worker Conditions BRA**, and then **Hazard Agent/IPE**

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

Worker Conditions **Hazard Agent/IPE** Environmental Responsible

Employee ID KRE0005 Empl Record 0 Name Francle Avelino de Araujo

Hazard/IPE Details 🔍 1 of 1

Effective Date 10/07/2021

Hazard Factor 🔍 1 of 1

Set ID KRSI1 🔍 Brazilian SetID 1 + -

Hazard ID KR001 🔍 MECHANICAL WORKSHOP

*Hazard Agent Code 🔍

*Hazard Evaluation Type Quantitative ▾

*Hazard Unit 01 🔍 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 | View All

	IPE Code	Description	IPE AC		
1				+	-

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).
Hazard ID	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.

Field or Control	Description
Hazard Agent Code	Select the hazard agent code for the selected hazard. This field is required. Note: 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. Hazard agent codes are defined on the PeopleSoft Global Payroll for Brazil: Hazard Agent Code BRA Page.
Proceeding Number	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 Proceeding Number field that appears.
Hazard Evaluation Type	Select an evaluation type for the work hazard, <i>Qualitative</i> or <i>Quantitative</i>. This field is required. If the hazard agent code is <i>09.01.001</i>, this field becomes unavailable for edit.
Hazard Unit	Select a unit of measure for the work hazard. This required field appears if the hazard evaluation type is <i>Quantitative</i>. Hazard units are defined on the Hazard Units BRA Page.
Number of Units	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>.
Tolerance Limit	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.
Technique Used	Enter the technique used to measure the work hazard. This required field appears if the evaluation type is <i>Quantitative</i>.
Hazard Agent Description	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</i>, <i>01.02.001</i>, <i>01.03.001</i>, <i>01.04.001</i>, <i>01.05.001</i>, <i>01.06.001</i>, <i>01.07.001</i>, <i>01.08.001</i>, <i>01.09.001</i>, <i>01.10.001</i>, <i>01.12.001</i>, <i>01.13.001</i>, <i>01.14.001</i>, <i>01.15.001</i>, <i>01.16.001</i>, <i>01.17.001</i>, <i>01.18.001</i>, or <i>05.01.001</i>. The system generates a mapping error in eSocial if the required value does not exist for any hazard agent code previously mentioned.

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.

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

Field or Control	Description
IPE Code	Select an individual equipment that the worker uses to protect himself or herself from the work hazard. This is a required field. IPEs are defined on the Protection Equipment BRA Page .
IPE AC	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, and then **Health and Safety**, and then **Define Hazardous Environments**, and then **Worker Conditions BRA**, and then **Environmental Responsible**

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

Worker Conditions
Hazard Agent/IPE
Environmental Responsible

Employee ID KRE0005
Empl Record 0
Name Francle Avelino de Araujo

Environment Responsible

Effective Date 10/07/2021

Responsible Information

*Organ Statutory CRM

Physician ID 63000000001 Selso Miranda

CRM 202602200070

Country BRA Brazil

State MT Mato Grosso

NIS/PIS 004455555551

CPF National ID 63485005005

Responsible Information

Field or Control	Description
Organ Statutory	Select the organization to which the individual belongs. Values are: <i>CREA</i> <i>CRM</i> <i>Not Applicable</i> <i>Other</i>
Responsible ID	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. Individuals who serve as evaluators of work environments are defined using the Environment Responsible BRA component. If the person is not already defined in the HCM system, enter the registration information manually. See Also Environmental Responsible BRA - Registry Data Page
Physician ID	Select the physician as the person responsible for evaluating the work conditions of the worker. This field appears if <i>CRM</i> is selected. Physicians are defined using the Medical Register BRA component. If the person is not already defined in the HCM system, enter the registration information manually. See Also Medical Register Page

Field or Control	Description
CPF National ID	This field is required if only one hazard agent code specified on the Hazard Agent/IPE Page is 09.01.001. The CPF used must be unique for each Environment Responsible row.

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

Page Name	Definition Name	Usage
Claim Threshold - Claims AUS Page	CLAIM_INFO_AUS	• Establish claims threshold information by state. • Establish claims threshold information by union. • Establish claims threshold information for a claim with an approved status. You must have a claim number to access this page.

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**, and then **Product Related**, and then **Workforce Monitoring**, and then **Health and Safety**, and then **Claim Threshold - Claims AUS**, and then **Claim Threshold - Claims AUS**
- **Workforce Monitoring**, and then **Health and Safety**, and then **Define Medical Services**, and then **Claim Threshold - Claims AUS**, and then **Claim Threshold - Claims AUS**
- **Workforce Monitoring**, and then **Health and Safety**, and then **Define Medical Services**, and then **Claim Threshold - State AUS**, and then **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

View All

	Threshold Days	Claimable Percent	Makeup Pay %			
1				+	-	

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.

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

Example

Based on **10 Pre Injury Threshold Days** before the organization can pass on claims expenses to the insurer, a company pays **100** percent of the worker's claim for lost wages for the first ten days that the worker is absent. After the tenth day, the company can pass on **95** percent of the worker's wage claims to the Insurer. To establish these parameters, you would enter the following values in the **Makeup Details** group box:

Threshold Days	Claimable Percent	Makeup Pay %
0	0	100

Threshold Days	Claimable Percent	Makeup Pay %
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

Page Name	Definition Name	Usage
PPP Parameters BRA Page	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, and then **Product Related**, and then **Workforce Monitoring**, and then **Health and Safety**, and then **PPP Parameters BRA**, and then **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	Hire	FST	First Job		

PPP Valid Exams

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

	*Type of Exam	Medical Exam Type		
1	Pre-Employment	Physical Exam		

Field or Control	Description
Action and Reason	Enter the actions and reasons that should be included on the PPP report for the company.
Type of Exam	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.
Medical Exam Type	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

Page Name	Definition Name	Usage
Class/Subclass Table - CAN Page or Class/Subclass CAN Page	HS_CLASS_CAN	Identify the standard industry classes and subclasses for Canadian business locations, based upon the classifications designated by the WCB.
Occupation Table - CAN Page or Occupations CAN Page	HS_OCCUPATION_CAN	Set up the standard occupational classifications used by the WCB.
Contributing Factors - CAN Page or Contributing Factors CAN Page	HS_CONTFAC_CAN	Define the types of casual factors associated with a health and safety incident.
Prevent. Actions Table - CAN Page or Preventative Actions CAN Page	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**, and then **Product Related**, and then **Workforce Monitoring**, and then **Health and Safety**, and then **Class/Subclass Table - CAN**, and then **Class/Subclass Table - CAN**
- **Workforce Monitoring**, and then **Health and Safety**, and then **Define Accident/Injury Info**, and then **Class/Subclass CAN**, and then **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/Subclass 10400

Details		1 of 1		View All	
*Effective Date	01/01/1980	*Status	Active		
Description	Pulp & Paper				
Short Description	Pulp&Paper				

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

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**, and then **Product Related**, and then **Workforce Monitoring**, and then **Health and Safety**, and then **Occupation Table - CAN**, and then **Occupation Table - CAN**
- **Workforce Monitoring**, and then **Health and Safety**, and then **Define Accident/Injury Info**, and then **Occupations CAN**, and then **Occupations CAN**

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		1 of 1	View All
*Effective Date	01/01/1980	*Status	Active
*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_CONTFAC_CAN) to define the types of casual factors associated with a health and safety incident.

Navigation:

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

|<<<1 of 1>>>|

View All

*Effective Date

01/01/1980

*Status

Active

+

-

*Description

INFLUENCE OF ALCOHOL OR DRUGS SUSPECTED

Short Description

ALCOHOL

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

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**, and then **Product Related**, and then **Workforce Monitoring**, and then **Health and Safety**, and then **Prevent. Actions Table - CAN**, and then **Prevent. Actions Table - CAN**
- **Workforce Monitoring**, and then **Health and Safety**, and then **Define Accident/Injury Info**, and then **Preventative Actions CAN**, and then **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

Q

|<<<1 of 1>>>|

View All

*Effective Date

01/01/1980

*Status

Active

+

-

*Description

ESTABLISH CLOSER SUPERVISION

Short Description

ESTSUPV

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

(DEU) Setting Up 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

Page Name	Definition Name	Usage
Case Officer Table DEU Page or Case Officer DEU Page	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.
Social Insurance Unit Page	SI_UNIT_GER	Set up the organization's Social Insurance Unit ID (Betriebsnummer). Use this number when reporting information to any public office.

Page Name	Definition Name	Usage
Correct. Actions Table DEU Page or Corrective Actions DEU Page	HS_CORRECT_ACT_GER	Define corrective actions that you have implemented and associate the corrective action with a corrective action category.
Disease Class Table DEU Page or Disease Class DEU Page	HS_DIS_CLASS_GER	Define disease classes and associate them with a disease type.
Prevent. Actions Table - DEU Page or Preventative Actions DEU Page	HS_PREVENT_ACT_GER	Define the actions that you have implemented to prevent workplace incidents or accidents.
Unsafe Item Table DEU Page or Unsafe Items DEU Page	HS_UNSAFE_ITEM_GER	Define unsafe items and associate them with an unsafe item class.
Work Area Class Table DEU Page or Work Area Class DEU Page	HS_WA_CLS_TBL_GER	Set up work area classes as defined by the employer's liability insurance association.
Work Area Category Table DEU Page or Work Area Category DEU Page	HS_WA_CTG_TBL_GER	Set up work area categories as defined by the employer's liability insurance association.
Work Area Table DEU Page or Work Area DEU Page	HS_WA_TBL_GER	Set up work areas as defined by the employer's liability insurance association.
Coop Society Data Page	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**, and then **Product Related**, and then **Workforce Monitoring**, and then **Health and Safety**, and then **Case Officer Table DEU**, and then **Case Officer Table DEU**
- **Workforce Monitoring**, and then **Health and Safety**, and then **Define Accident/Injury Info**, and then **Case Officer DEU**, and then **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

*Effective Date

05/21/2020

+

-

Details

*Empl ID

+

-

*Officer Type

+

-

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

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, and then **Product Related**, and then **Workforce Administration**, and then **Workforce Data DEU**, and then **Social Insurance Unit**, and then **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

View All

*Effective Date

01/01/1980

*Status

Active

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-

*Description

SI Unit for GD1 Munich

Short Description

SI Munich

BTNR

91200003

Field or Control	Description
BTNR (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**, and then **Product Related**, and then **Workforce Monitoring**, and then **Health and Safety**, and then **Correct. Actions Table DEU**, and then **Correct. Actions Table DEU**
- **Workforce Monitoring**, and then **Health and Safety**, and then **Define Accident/Injury Info**, and then **Corrective Actions DEU**, and then **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

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1 of 1

View All

Effective Date

05/21/2020

Status

Active

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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**, and then **Product Related**, and then **Workforce Monitoring**, and then **Health and Safety**, and then **Disease Class Table DEU**, and then **Disease Class Table DEU**
- **Workforce Monitoring**, and then **Health and Safety**, and then **Define Accident/Injury Info**, and then **Disease Class DEU**, and then **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**, and then **Product Related**, and then **Workforce Monitoring**, and then **Health and Safety**, and then **Prevent. Actions Table - DEU**, and then **Prevent. Actions Table - DEU**
- **Workforce Monitoring**, and then **Health and Safety**, and then **Define Accident/Injury Info**, and then **Preventative Actions DEU**, and then **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

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*Description

Vocational Training

Short Description

Voc Train

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

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**, and then **Product Related**, and then **Workforce Monitoring**, and then **Health and Safety**, and then **Unsafe Item Table DEU**, and then **Unsafe Item Table DEU**
- **Workforce Monitoring**, and then **Health and Safety**, and then **Define Accident/Injury Info**, and then **Unsafe Items DEU**, and then **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

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1 of 1

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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.

Field or Control	Description
Unsafe Item	The unsafe item code that you entered appears in this field. This code is used on the Injury Details - Details page.
Unsafe Item Class	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**, and then **Product Related**, and then **Workforce Monitoring**, and then **Health and Safety**, and then **Work Area Class Table DEU**, and then **Work Area Class Table DEU**
- **Workforce Monitoring**, and then **Health and Safety**, and then **Define Accident/Injury Info**, and then **Work Area Class DEU**, and then **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

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1 of 1

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View All

*Effective Date

05/21/2020

*Status

Active

▼

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*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**, and then **Product Related**, and then **Workforce Monitoring**, and then **Health and Safety**, and then **Work Area Category Table DEU**, and then **Work Area Category Table DEU**
- **Workforce Monitoring**, and then **Health and Safety**, and then **Define Accident/Injury Info**, and then **Work Area Category DEU**, and then **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

Q

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1 of 1

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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**, and then **Product Related**, and then **Workforce Monitoring**, and then **Health and Safety**, and then **Work Area Table DEU**, and then **Work Area Table DEU**
- **Workforce Monitoring**, and then **Health and Safety**, and then **Define Accident/Injury Info**, and then **Work Area DEU**, and then **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, and then **Health and Safety**, and then **Details DEU**, and then **Coop Society Data**, and then **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

Effective Date10/01/1999

Hazard

Description

1 of 1

View All

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

(GBR) Setting Up 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

Page Name	Definition Name	Usage
External Scheme GBR Page	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**, and then **Product Related**, and then **Workforce Monitoring**, and then **Health and Safety**, and then **External Scheme Table GBR**, and then **External Scheme GBR**
- **Workforce Monitoring**, and then **Health and Safety**, and then **Define Accident/Injury Info**, and then **External Scheme GBR**, and then **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

Field or Control	Description
External Scheme	The external scheme code that you entered appears in this field. Use this field on the Employment Details page.
Scheme Type	Select the appropriate option to indicate whether the scheme type is a Training Scheme or Work Experience .

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

Page Name	Definition Name	Usage
Non-Employee Details - Name Page	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.
Non-Employee Details - Personal Details Page	HS_NON_EMPL2	Maintain additional details for the individual.
Non-Employee Details - Extra Details Page	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, and then **Health and Safety**, and then **Verify Person Involved/ Witnessed**, and then **Non-Employee Details**, and then **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

Non-Empl ID

00000000001

*Name Format

English

▼

Edit Name

Display Name

Henry Gerald

Field or Control	Description
Non-Empl ID (non-employee ID)	The non-employee ID that you entered appears in this field. The system automatically assigns the non-employee ID as the number immediately following the one that is in the Last Non-Employee ID Assigned field in the Installation Table. The number first appears as 000000000000. The actual number assigned to the person appears after you save the information that you enter. Or, you can enter the number manually. Note: 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.

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, and then **Health and Safety**, and then **Verify Persnnl Invlvd/ Witnessd**, and then **Non-Employee Details**, and then **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.

Name

Address

Personal Details

Extra Details

Gerald, Henry Theodore

Non-Empl ID 00000000001

Birthdate

Date of Death

Business Title

Employer

Business Unit

GBIBU

Global 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, and then **Health and Safety**, and then **Verify Persnnl Invlvd/ Witnessd**, and then **Non-Employee Details**, and then **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.

 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

Page Name	Definition Name	Usage
Additional Employee Details Page	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.
Employment Page	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, and then **Health and Safety**, and then **Verify Personnl Involvd/ Witnessd**, and then **Additional Employee Details**, and then **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.
Case Officer	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, and then **Health and Safety**, and then **Verify Persnnl Involvd/ Witnessd**, and then **Witness Employment Information**, and then **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.

Category

Worker Category		
☐ Full Time	☐ Permanent	☐ Seasonal
☐ Volunteer	☐ Casual	Seasonal End Dt
☐ Subcontractor	☐ Student	
Employment Details		

United Kingdom

External Scheme

(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

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

Relationship

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

Category

Field or Control	Description
Worker Category	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> .
Full Time, Permanent, Seasonal, Volunteer, Casual, Subcontractor, and Student	Indicate the employee's employment category by selecting from the appropriate check boxes.

Field or Control	Description
Employment Details	This field is used with the Subcontractor category only. Describe the role of the subcontractor.
Seasonal End Dt (seasonal end date)	If this is a seasonal employee, indicate the end date of their employment. This field is not available for entry unless you select the Seasonal 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.

Field or Control	Description
External Scheme	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

Page Name	Definition Name	Usage
Health Card 1 page	GVT_HEALTH_CARD_1	Record physician contact information for employees.

Page Name	Definition Name	Usage
Health Card 2 Page	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.
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 Topics

- [Tracking Employee Medical Exam Results](#)

This section includes common elements used in 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, and then **Health and Safety**, and then **Record Medical Exam Results**, and then **Employee Health Card**, and then **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

	*Drug Name		
1		+	-

Previous Tests Administered

Data

	*Test Date	*Test Name		
1			+	-

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
1 of 1
View All

*Regulatory Region USA United States

Data

	*Allergy Code	Description	*Start Date	End Date	Comments		
1						+	-

Immunization Details
1 of 1
View All

*Regulatory Region USA United States

Data

	*Immunization Code	Description	*Start Date	End Date	Comments		
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

Q

1 of 1

View All

*Regulatory Region

USA

Q

United States

+

-

Data

Q

1-1 of 1

View All

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

Disease Details

Q

1 of 1

View All

*Regulatory Region

USA

Q

United States

+

-

Data

Q

1-1 of 1

View All

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

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, and then **Health and Safety**, and then **Verify Persnnl Invlvd/ Witnessd**, and then **Family Information**, and then **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	☒	☐	+	-

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

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

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 Topics

- [Understanding Health and Safety Incidents](#)
This section discusses:

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

Page Name	Definition Name	Usage
Incident Details - Incident Page	HS_INCIDENT	Add a new incident or update an existing incident. (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.
Incident Attachments Page	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.
Incident Details - Notification Page	HS_INC_NOTIFY	Record incident details that employees generate.
Incident Details - Description Page	HS_INC_DESCRIPTION	Describe the health and safety incident and record related data.
Incident Details - Location Page	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.
Incident Details - Travel Page	HS_INC_TRAVEL	Record travel-related incident details.
Route Details Page	HS_INC_ROUTE_SEC	Provide additional travel route details for health and safety incidents.

Page Name	Definition Name	Usage
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.
Incident Details - People Page	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. (CAN) Users in British Columbia who report incidents to the BC WCB electronically must provide address information for all persons who are connected to the incident.
Incident Details - Reporting Page	HS_INC_REPORT	Maintain documentation showing that you notified the proper authorities of the incident.
Incident Details BRA - CAT Information Page	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**, and then **Health and Safety**, and then **Obtain Incident Information**, and then **Incident Details**, and then **Incident**
- **Workforce Monitoring**, and then **Health and Safety**, and then **Obtain Incident Information**, and then **Incident Details BRA**, and then **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 Number70000256

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

☐ Date and Time Exact

Exposure

Start Date

Start Time

End Date

End Time

Disability

☐ Disability Program Available

Contact ID

Q

Description



Payroll Contact

Payroll Contact ID

Q

Other Information

☐ RTW Program Available

☒ In WCB Jurisdiction

Class/Subclass

Q

Business Type

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

Where

☐ Supervisor

Sign Off By

☐ Victim

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

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

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

 Note

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

Documentation

Field or Control	Description
Add Attachments	Select to attach new files to the incident on the Incident Attachments Page . This link appears if the incident does not have any attachments.
View Attachments	Select to attach new files or view files already uploaded for the incident on the Incident Attachments Page . 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.

Field or Control	Description
Outcome	The value that appears in this field is derived from the most severe injury outcome that you enter on the Injury Details page. For incidents with a CANBC regulatory region, the Outcome field is activated based upon a relationship between the incident outcome here and the injury outcome. If the Resulted in Injury or Illness check box is selected, the system verifies that an injury is entered before you save the incident. When you save the incident, the system associates an incident outcome with each injury outcome. For example, if only one person is injured, the system populates the Outcome field with the same value as the injury outcome. If more than one person is injured, the most severe injury outcome defines the incident outcome. Possible values for the Outcome field are: <i>Reported Only:</i> An injury occurred but no medical attention is sought nor is time lost. <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. <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. <i>Fatal:</i> A fatal injury. <i>Dangerous Occurrence:</i> No injuries or injury outcomes are involved.
Date and Time Exact	Select to indicate that the date and time on the primary page are exact.
Exposure	If you select the exposure incident type on the primary page, enter the exposure start date and time and end date and time, if they're known.
Disability Program Available	Select if there is a disability program available at the organization.
Contact ID (Disability)	You must select the Disability Program Available check box to use this field.
Description (description)	You must select the Disability Program Available check box to use this field.
Payroll Contact ID	Enter the payroll contact ID for the incident.
RTW Program Available (return to work program available)	Select to indicate if there is a return-to-work program available at the organization.
In WCB Jurisdiction	Select to indicate if the business operation that is involved is in the WCB jurisdiction.

Field or Control	Description
Class/Subclass	Enter the industry class or subclass code. Define the standard industry classes and subclasses for the Canadian business locations on the Class/Subclass Table - CAN page.

(FRA) France

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

(MEX) Mexico

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

(IND) India

Indicate the incident subtype.

Related Topics

- Application Fundamentals: Understanding Regulatory Regions

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 ↑↓	Description ↑↓	Attached By ↑↓	Attached On ↑↓	2 rows
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	

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

Field or Control	Description
Add Attachment	Select the button to upload a file for the specified incident. See Also Application Fundamentals: File Attachments and Attachment Pages.
Attachments	Select a link to save the uploaded file. 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**, and then **Health and Safety**, and then **Obtain Incident Information**, and then **Incident Details**, and then **Notification**
- **Workforce Monitoring**, and then **Health and Safety**, and then **Obtain Incident Information**, and then **Incident Details BRA**, and then **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

Notification

Description

Location

Travel

People

Reporting

Incident Number19120001Date01/01/2009Incident TypeExposure

Incident Notification

Date Reported01/09/2009

Time Reported9:00AM

Reported To Empl IDKC0026Carol Johnson

Reported By Empl IDKC0017Jessica Brown

Reported By Non-Empl ID

Incident Tracking

Date Recorded01/09/2009

Time Recorded9:00AM

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

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

 Note

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

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**, and then **Health and Safety**, and then **Obtain Incident Information**, and then **Incident Details**, and then **Description**
- **Workforce Monitoring**, and then **Health and Safety**, and then **Obtain Incident Information**, and then **Incident Details BRA**, and then **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 Number19120001Date01/01/2009Incident TypeExposure

Dangerous Occurrence

CodeNULL

Description

Gas pipeline erupted on property.

Canada

Near Miss TypeRelease of Toxic or Hazardous

Worker Involved?

Data

1-1 of 1View All

Contrib Factor	Description	Other Description			
00996	OTHER		+	-	

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 Code 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.

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

(IND) India

Field or Control	Description
Alcohol/Substance Taken	Select if alcohol or a substance is taken during the time of the incident.

Incident Details - Location Page

Use the Incident Details - Location page (HS_INC_LOCATION) to identify the location where the incident occurred.

Navigation:

Workforce Monitoring, and then **Health and Safety**, and then **Obtain Incident Information**, and then **Incident Details**, and then **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

Location

Travel

People

Reporting

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

Incident Location Data

☒ Occurred on Employer Premises

Location Set ID

Location

Establishment ID

Exact Location

176 characters remaining

Table Set shared across Corp

[View Address](#)

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 [Get Default Address](#)

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

Field or Control	Description
Occurred on Employer Premises	Select if the incident occurred on employer premises.
Location Set ID	If you select the Occurred on Employer Premises check box, select a location setID from the list of prompt values that come from the Company table. Use this field to set up the Location list of prompt values. For instance, if the location where the employee normally works is in Canada, but the location where the incident occurred is in France, use the Location SetID field to specify a French setID, and you can select the French location where the incident occurred.
Location	Select from the list of prompt values that come from the Location table for the location setID that you select.

Field or Control	Description
View Address or Edit Address	Click this link to view or edit the address where the incident occurred. - If the incident occurred on the employer's premises you can only view the address. The address information is populated from the Location table. - If the incident occurred off the employer's premises, this link accesses the Address Data page where you can enter the address data for the off-site location where the incident occurred.
Exact Location	Record a detailed description of where the incident occurred, using up to 240 characters.

(CAN) Canada

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

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

(GBR) United Kingdom

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

Field or Control	Description
Local Authority	Identify the local authority if the incident did not occur at a specific postal code location. For example, if an accident occurs while an employee is traveling in a vehicle, you might enter the location of the accident as <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.
Public Place	Select if the incident location is a public place.

(IND) India

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

(ESP) Spain

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

See PeopleSoft Human Resources Administer Workforce: Managing Delta Communications.

Incident Details - Travel Page

Use the Incident Details - Travel page (HS_INC_TRAVEL) to record travel-related incident details.

Navigation:

- **Workforce Monitoring**, and then **Health and Safety**, and then **Obtain Incident Information**, and then **Incident Details**, and then **Travel**
- **Workforce Monitoring**, and then **Health and Safety**, and then **Obtain Incident Information**, and then **Incident Details BRA**, and then **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 Number 19120001 Date 01/01/2009 Incident Type Exposure

Travel Details

Start Date [] Start Time [] PST [v]
Arrival Date [] Arrival Time [] PST [v]
Destination [] Route Details
Mode Of Transport [Q] Break Details
[] Break Taken In Journey Animal Details
[] Animals Involved
Comment []

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 Police [v]
Reference Number []
Country USA [Q] 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 Route Details 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 Break Details link available when you move your cursor out of the field. Click the link to access the Break Details page.
Animals Involved	Select if an animal is involved in the incident.
Animal Details	When you select the Animals Involved check box, the system makes the Animal Details link available. Click the link to access the Animal Details page.
(DEU) Germany	
Field or Control	Description
Alcohol/Substance Taken	If applicable, specify how drugs or alcohol are involved in the incident.
Endorser	Record the identity of the person or authority who confirmed the information in the Alcohol/Substance Taken field.
Accident Report Type	Select from the list of German authorities to indicate the accident report type, if needed.
Reference Number	Enter the reference number that this public office is using to store the report.

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.

Route Details

×

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

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

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**, and then **Health and Safety**, and then **Obtain Incident Information**, and then **Incident Details**, and then **People**
- **Workforce Monitoring**, and then **Health and Safety**, and then **Obtain Incident Information**, and then **Incident Details BRA**, and then **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.

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.

People Connected to this Incident

Field or Control	Description
Empl ID (employee ID) or Non-Employee ID	Enter either an employee ID or a non-employee ID. The field that you do not use disappears. Note: Enter employees into the system by using the Administer Workforce business process. Enter non-employees into the system by using the Non-Employee Details component (HS_NE_PERS_DATA) component. See PeopleSoft Human Resources Administer Workforce: (Classic) Adding a Person. Add a row for each individual who is connected to the incident.

Field or Control	Description
Role	Indicate the individual's role in the incident by using the list of translate values. The value that you select for this field affects the availability of fields on the remainder of the page.
Witnesses Confirmation	This field is available when you select the Witness check box. Use the list of translate values to identify whether or not the witness confirms the statement made by the individual who is involved in the incident.
Responsible For Incident, Trustworthy Person, Able To Answer Questions, and Under The Influence Of Drugs	Select the appropriate check boxes. If the individual is in the role of Investigator or Witness , then the Responsible For Incident check box is unavailable for data entry. A witness is not involved in the incident but is merely an observer. An eyewitness is involved in the incident.
Drug Class	If you select the Under the Influence of Drugs check box, select the appropriate drug class from the list of available options.
Edit Address	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.

Field or Control	Description
Investigator Type	Select the type of investigator assigned to the incident. This field is available when the individual is identified as an investigator.

(DEU) Germany

Field or Control	Description
Insurance Details	Enter additional insurance information for people who are involved in German incidents.

(FRA) France

Field or Control	Description
Accident Insurance	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**, and then **Health and Safety**, and then **Obtain Incident Information**, and then **Incident Details**, and then **Reporting**
- **Workforce Monitoring**, and then **Health and Safety**, and then **Obtain Incident Information**, and then **Incident Details BRA**, and then **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.

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.

Reporting

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

Field or Control	Description
Regulatory Region	Select the region where the initial incident occurred. 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. Note: If you change the regulatory region for an existing incident, and the setID for the previous and current regulatory regions differ, the system deletes all of the relevant linked values from the setup tables. Before proceeding with the change, the system prompts you to confirm the action. When the original information is deleted, you must reenter the data for the incident.
Person Reporting	Select the person who is reporting (employee ID). The values come from the Workforce Administration business process.
Location SetID	Select the location setID for the location of the person who is reporting. Prompt values come from the TableSetID table.
Reporting Location	Select the reporting location that is officially making the report.

(CAN) Canada

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

Field or Control	Description
Report Status	Select an option to indicate whether the report is preliminary or final.
Reporting	Enter the Canadian WCB firm number and location code.
Review Submission Status	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.

(IND) India

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

Related Topics

- Application Fundamentals: Understanding Regulatory Regions

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, and then **Health and Safety**, and then **Obtain Incident Information**, and then **Incident Details BRA**, and then **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

Country Brazil

Address
Leblon
Rio de Janeiro Rio de Janeiro 32000-030

[Edit Address](#)

CAT Specific Location

Field or Control	Description
CAT Incident Type	Select the work incident type. Valid values are <i>Illness</i>, <i>Route</i>, and <i>Typical</i>. This field is required if the selected incident type in the header area is <i>Accident</i>. If the selected CAT incident type is <i>Typical</i>, and the Worked Hours field is blank for the associated injury details on the Injury Details - Details BRA Page, the system generates a mapping error in eSocial. See Also PeopleSoft Global Payroll for Brazil: eSocial Events Monitor Page.
Police Register	Select to indicate that a police report has been filed.
Location Type	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>. This field is required if the selected incident type in the header area is <i>Accident</i>.
Service Taker	Select the service taker where the incident took place. This field appears if the selected location type is <i>Employee Service Taker</i>.
CEI/CNPJ and Description	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>. These fields are available for manual input if Global Payroll for Brazil is not installed.

Field or Control	Description
Location Set ID	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 Location SetID field to specify the other setID, and you can select the location where the incident occurred. This field appears if the selected location type is <i>Employer Establishment</i> or <i>Establishment Outside Brazil</i> .
Location Code	Select from the list of prompt values that come from the Location table for the location setID that you select. This field appears if the selected location type is <i>Employer Establishment</i> or <i>Establishment Outside Brazil</i> .
Establishment ID	Enter the establishment where the incident took place. If a service taker is selected, the system refines the list of available establishments to the ones that are associated with the service taker.
Workplace Code	Enter the workplace where the incident took place. Select an establishment before specifying a workplace. Workplaces are defined on the Workplace Table BRA Page .
CAT Details	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.
Country, Address and Edit Address	Enter the country code where the incident occurred. Then click the Edit Address button to view or edit the address where the incident occurred. The entered address is displayed on the Address field.
CAT Specific Location	Record a detailed description of where the incident occurred.

Related Topics

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

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

Field or Control	Description
Accident Type	If the injury resulted from an accident, select the type of accident from the Accident Type table.
Body Part	Select a code from the list of values from the Body Parts table.
Nature of Injury	Select a code to identify the injury in terms of its principal physical characteristics (for example, what happened to the employee). The values come from the Nature of Injury tables.
PAT (ESP)	Partes de Accidentes de Trabajo.
Primary Injury	Select if this injury detail is associated with the primary injury.
RATSB (ESP)	Relación de Accidentes de Trabajo Sin Baja médica.
Side of Body	Indicate the side of the body for the body part, if appropriate, by selecting from the list of translate values.
Source of Injury	Select a code to identify the object, substance, exposure, or bodily motion that produced or inflicted the injury. Use the list of prompt values that come from the Source of Injury table.
Unsafe Act Performed	If applicable, select a code to indicate if the accident was caused by an unsafe action.

Pages Used to Enter Injury Details

Page Name	Definition Name	Usage
Injury Details - Injury Page	HS_INJ_NOTIFY	Enter information about employees and non-employees who have work-related injuries or illnesses. (BRA) To report a Brazilian injury using the Injury Details BRA component, the originating incident must be reported using the Incident Details BRA component.
(ESP) Detailed PAT Data Page (Injury Details - Injury)	HS_PAT1_ESP_SEC	(ESP) Enter detailed information about the accident that caused the injury for PAT reporting. The link appears only when <i>PAT</i> is the value in the Incident Type field in the Spain section of the Injury Details - Injury page.
(ESP) Detailed RAF Data Page (Injury Details - Injury)	HS_RAF1_ESP_SEC	(ESP) Enter the reason for discharge, the injury grade, and the diagnosis code for the RAF incident.
Injury Details - Description Page	HS_INJ_DESCRIPTION	Enter detailed information about the injury or illness or both that are involved in the incident.
Injury Details - Statements Page	HS_INJ_STATEMENT	Document the statements that are made by the injured or ill party, the employer, and witnesses.
Injury Details - Details Page	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.
(ESP) Detailed PAT Data Page (Injury Details - Details)	HS_PAT2_ESP_SEC	(ESP) Enter detailed information about the accident that caused the injury.

Page Name	Definition Name	Usage
(ESP) Detailed RATS Data Page (Injury Details - Details)	HS_RATSB_ESP_SEC	(ESP) Enter detailed data for RATS reporting. The link appears only when <i>RATS</i> is the Incident Type field value in the Spain section of the Injury Details - Injury page.
Injury Details - 1st Aid Page	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	Enter additional details about the time when the individual was transported to a hospital by an ambulance. The Ambulance Required check box on the Injury Details - 1st Aid page must be selected for the Ambulance Details link to appear.
Prior Disability	HS_INJ_PDSCAN_SEC	Enter details about any relevant prior disabilities of the injured or ill person. The Prior Disability check box on the Injury Details - 1st Aid page must be selected for the Disability link to appear.
Prior Health Condition	HS_INJ_PHCCAN_SEC	Enter details about any relevant prior health conditions of the injured or ill person.
Injury Details - Diagnoses Page	HS_INJ_DIAGNOSIS	Record details about the physician, hospital or clinic, and the medical diagnoses that are involved with the injured and ill employees.
(ESP) Detailed PAT Data Page (Injury Details - Diagnoses)	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.
Injury Details - Work-Related Page	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.

Page Name	Definition Name	Usage
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.
Long Term Earnings Page	HS_INJ_LTECAN_SEC	(CAN) Enter additional information about long term earnings for Canadian employees who have work-related injuries or illnesses.
Return To Work Page	HS_INJ_RTWCAN_SEC	(CAN) Enter additional return-to-work details for Canadian employees who are injured or ill in work-related incidents.
Work Information Page	WCB_WORK_INFO_SEC	(CAN) Enter additional work information for employees who are injured or ill in work-related incidents.
Injury Details - Reporting Page	HS_INJ_REPORT	Track if incidents are reportable under the terms of an authority of a regulatory region.
Injury Details - Details BRA Page	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**, and then **Health and Safety**, and then **Obtain Incident Information**, and then **Injury Details**, and then **Injury**
- **Workforce Monitoring**, and then **Health and Safety**, and then **Obtain Incident Information**, and then **Injury Details BRA**, and then **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 1 of 1 View All

Empl ID Q Jessica Brown Empl Record 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 📅

Time Reported 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 Exposure

Date 📅
Time
☐ Date and Time Exact

Start Date 📅 Start Time
End Date 📅 End Time

Designates 1 of 1 View All

Sequence 1 + -

Designate Q Nancy Quency

Date Reported 📅 Time Reported

Position Type First 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

From

To

Morning

Afternoon

United Kingdom

☐ Member Of Public

☐ Self-Employed

Spain

Incident Type

Delta Reporting Status

Not Communicated

Field or Control	Description
Empl ID	For each person who is involved in the incident, select either an employee ID or a non-employee ID. The person's name, date of birth, gender and, if applicable, the date of death appear next to this field. Note: If a fatality occurs, enter the date of death in the Workforce Administration business process or the Non-Employee Details - Personal Details page, as appropriate.
Empl Record (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.
Employee Data at Incident Date	The information that appears here comes from job data that is valid as of the incident date.
Notification - This Person	Enter the date and time when this person's injury or illness was reported to an organization official.

(CAN) Canada

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

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

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

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

(DEU) Germany

Field or Control	Description
Owner Partner, Partner, Incompetent, and Relation	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.
Work Area	Select an option from the values that you set up in the Work Area table.

(FRA) France

Field or Control	Description
Timetable	Enter the time of the notification.

(GBR) United Kingdom

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

(ESP) Spain

Field or Control	Description
Incident Type	Select the incident type of the industrial accident: <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. <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.

Note

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

Field or Control	Description
Relapse	Select this check box if the industrial accident is a relapse occurrence caused by a previous temporary disability.
Absence Begin Date	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.
End Date	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.
Accident with sick note	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.
Medical Discharge or Death	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 PeopleSoft Human Resources Administer Workforce: Managing Delta Communications.

(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
Hiring	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.

Field or Control	Description
ETT	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.

Field or Control	Description
Place Code	Select the location where industrial accident took place. Valid values are: • <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 Road / KM, Other Data, and Commuting fields. • <i>Other Work Center</i>: The industrial accident occurred in another work center. By selecting this option, the page displays the External Company and SSN Employer fields. • <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 Road / KM and Other Data fields. • <i>Usual Work Center</i>: The industrial accident occurred in the employee's usual work center. The system uses the value of this field to populate the <codigo> tag in the XML file.
SSN Employer (social security number employer)	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. This field is available when you select <i>Other Work Center</i> from the Place Code field.
Road / Km, and Other Data	Enter the distance or road traveled, as well as other pertinent data about the place where the injury occurred. These fields are available when you select <i>In Itinere</i> or <i>Taken Journey</i> from the Place Code field.
Commuting	Enter whether the injury occurred while traveling <i>To Work</i> or <i>Back from Work</i>. This field is available when you select <i>In Itinere</i> from the Place Code field.

Schedule Data

Field or Control	Description
Working Hour	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.

Related Topics

- PeopleSoft Human Resources Administer Workforce: Managing Delta Communications

(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.

Field or Control	Description
Reason Discharge	Select the reason for the discharge. The system populates the <causa> tag in the XML file with this value.

Field or Control	Description
RAF Injury Grade	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.
Diagnosis Code	Select the diagnosis code according to social security administration codes. The system populates the <diagnostoco> tag in the XML file with this value.

Related Topics

- PeopleSoft Human Resources Administer Workforce: Managing Delta Communications

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**, and then **Health and Safety**, and then **Obtain Incident Information**, and then **Injury Details**, and then **Description**
- **Workforce Monitoring**, and then **Health and Safety**, and then **Obtain Incident Information**, and then **Injury Details BRA**, and then **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.

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

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

Person Involved 1 of 1 [View All](#)

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

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 Outcome

Business Type

Description of Accident Scene

200 characters remaining

People

Empl ID David Henderson

Role

☐ 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.

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

Field or Control	Description
Injury/Illness Details	Enter details about the illness.

(GBR) United Kingdom

Field or Control	Description
Occ Illness Diagnosis Date (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.

Field or Control	Description
Injury Outcome	Values are <i>Fatality</i> , <i>Health Care Only</i> , <i>Reported Only</i> , and <i>Short Term Disability</i> .
Business Type	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.

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

① 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**, and then **Health and Safety**, and then **Obtain Incident Information**, and then **Injury Details**, and then **Statements**

- **Workforce Monitoring**, and then **Health and Safety**, and then **Obtain Incident Information**, and then **Injury Details BRA**, and then **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 Employer Objects To Statement and enter the objections.
Employer's Statement	Enter the employer's statement.
Injured Party's Statement	Enter the injured party's statement. Select Witness Confirms Statement if a witness confirms the injured person's statement.

 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**, and then **Health and Safety**, and then **Obtain Incident Information**, and then **Injury Details**, and then **Details**
- **Workforce Monitoring**, and then **Health and Safety**, and then **Obtain Incident Information**, and then **Injury Details BRA**, and then **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.

InjuryDescriptionStatementsDetails1st AidDiagnosesWork-RelatedReporting

Incident Number19120001Date01/01/2009Incident TypeExposure

Person Involved

Empl IDKC0017Jessica BrownEmpl Record0

Date of Birth02/10/1962Date of DeathGenderFemale

Injury Description

Body PartsNature of InjurySource of InjuryAccident TypeUnsafe Act

Primary Injury Details

Body PartNature of InjurySource of InjuryAccident TypeUnsafe 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

1-1 of 1

View All

Nature of Injury	Description	Body Part Code	Description		
				+	-

Germany

Unsafe Item

France

Protective Clothing Details

1-1 of 1

View All

Protective Clothing		
	+	-

United Kingdom

Height of Fall

meters

Spain

Accident with sick note

Field or Control	Description
Injury Description	Click the links to gain access to the detail pages that describe the attributes of the injury.

Note

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

(CAN) Canada

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

Field or Control	Description
Damaged Appliance Indicator	Select to indicate that the injury involved damage to an artificial appliance, for example, eyeglasses, a hearing aid, or dentures.
Worker Supplies Own Equipment	Select to indicate that the injured worker supplies his own equipment.
Nature of Injury	Enter the code that you want to link to a body part. The reason for creating this link is that the BC WCB assumes that the nature of injury is directly associated with some body part.

Field or Control	Description
Body Part Code	Enter the code for the body part that you want to link to the nature of the injury. To activate the link, save the information that you enter on the Body Parts and Nature of Injury pages, and save the information here.

(DEU) Germany

Field or Control	Description
Unsafe Item	Select an unsafe item code, if applicable. Values come from the DEU Unsafe Item table.

(FRA) France

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

(GBR) United Kingdom

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

(ESP) Spain

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

See PeopleSoft Human Resources Administer Workforce: Managing Delta Communications.

(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 Ocurrred

Gas pipeline erupted on property.

Where Accident Ocurrred

*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

Field or Control	Description
Risk Evaluation	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

Field or Control	Description
Usual Work	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

Field or Control	Description
Place Type	Select the type of place where the accident took place. Define valid values on the XML Code Table page.

Work When Accident Occurred

Field or Control	Description
Work Type	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)

Field or Control	Description
Task	Select the task that the employee was doing when the accident took place. Define valid values on the XML Code Table page.
Usual Working Tool	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)

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

How Accident Occurred

Field or Control	Description
Contact	Select the type of contact that took place for this industrial accident, such as contact with an electrical arc or dangerous substance.
Unusual Working Tool	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

Field or Control	Description
Multiple Employees	Select this check box to indicate that there were multiple employees involved in the accident.
Witness	Select this check box to indicate that there were witnesses to the accident. When you select this check box, the Witness Data field appears.

Field or Control	Description
Witness Data	Enter details about the witness. The system uses this value to populate the <datostes> tag in the XML file.

Related Topics

- PeopleSoft Human Resources Administer Workforce: Managing Delta Communications

(ESP) Detailed RATSB Data Page (Injury Details - Details)

Use the Detailed RATSB Data (Injury Details - Details) page (HS_RATSB_ESP_SEC) to enter detailed data for RATSB 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 RATSB Data (Injury Details - Details) page. You can find definitions for the fields and controls later on this page.

Detailed RATSB Data

Help

RATSB Data

*Contact00

No information

*Body Part00

Part of the body affected, without specifying

*Injury000

Tipe of not known injury or without specifying

OK

Cancel

RATSB Data

Field or Control	Description
Contact	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.
Body Part	Select the body part that was affected by the industrial accident. The system uses this value to populate the <partelesion> tag in the XML file. Define valid values on the XML Code Table page.

Field or Control	Description
Injury	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 Topics

- PeopleSoft Human Resources Administer Workforce: Managing Delta Communications

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

InjuryDescriptionStatementsDetails1st AidDiagnosesWork-RelatedReporting

Incident Number19120001Date01/01/2009Incident TypeExposure

Person Involved

Empl IDKC0017Jessica BrownEmpl Record0

Date of Birth02/10/1962Date of DeathGenderFemale

Injury Details

☐ Patient Taken To Hospital

☐ Fatal Injuries Sustained

☐ Resuscitation Required

☐ Ambulance Required

Unconsciousness

☐ Patient Fell Unconscious

HrsMins

First Aid and Medical Treatment

*Date01/01/2009

*Time9:10AM

EmployeeNon-Employee

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 AidAssisted by helper

How Worker Left First AidAssisted by helper

☐ Attendant Observe Unconscious

Ambulance Transportation Time

Hours

Minutes

Prior Conditions

☐ Prior DisabilityDisability

☐ Prior Health ConditionCondition

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
Patient Taken To Hospital	Select if the individual was taken to a hospital.
Fatal Injuries Sustained	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.
Resuscitation Required	Select if the individual required resuscitation.
Ambulance Required	If you select this check box, the system makes the Ambulance Details available. Click the link to access to the Ambulance Details page.
Patient Fell Unconscious	If you select this check box, the Hrs and Mins fields are available for entry. Enter the amount of time, in hours and minutes, that the individual remained unconscious.
Date and Time	Enter the date and time when first aid or medical treatment was provided.
Employee and Non-Employee	When you add a data row, both of these fields are available. Select either the employee ID or non-employee ID of the person who provides first aid or medical treatment.
First Aid, Medical, and None	Select the appropriate option to indicate the type treatment that was provided.

(CAN) Canada

Field or Control	Description
First Aider Design Sequence (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.
How Worker Arrived First Aid	Select the mode of transportation that was used to bring the injured or ill worker to the designate.
How Worker Left First Aid	Select the mode of transportation was used to take the injured or ill person away, if applicable.
Attendant Observe Unconscious	If you select the Patient Fell Unconscious check box on the primary page, then this check box is available for data entry. Indicate that the designate (first aider) observed that the injured person was unconscious at the time treatment was given.
Hours and Minutes	Enter the ambulance transportation time in hours or minutes or both. This is the amount of time that the ambulance took to transport the injured or ill person to the hospital. Note: In the context of operations and incidents that occur within the CANBC regulatory region, <i>Ambulance</i> specifically means British Columbia Ambulance.
Prior Disability and Prior Health Condition	Select the appropriate check boxes to indicate whether the injured or ill person had a relevant prior disability or prior health condition. When you select a check box, the associated Disability or Condition link is available. Click these links to access to the Prior Disability and Prior Health Condition pages.
Nearest Practitioner Distance	Enter the distance to the nearest medical practitioner, if it is known.
Nearest Hospital Distance and Nearest Hospital Name	Name the nearest hospital and enter its distance from the accident site.

(FRA) France

Field or Control	Description
Registered at Infirmary	Select if the injured or ill person was registered at an infirmary.
Date and Number	Enter the date of registration in the infirmary and the registration number.

Field or Control	Description
Medical Facility	Select the medical facility to which the injured or ill person was taken. Values come from the Medical Facilities table. If the injured or ill person was taken to a location that is not a medical facility in the system, then bypass the Medical Facility field, and describe where the individual was taken in the Where Taken field.

(GBR) United Kingdom

Field or Control	Description
Hospitalized for over 24 hours	Indicate if the injured or ill person was hospitalized for over 24 hours.

(IND) India

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

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**, and then **Health and Safety**, and then **Obtain Incident Information**, and then **Injury Details**, and then **Diagnoses**
- **Workforce Monitoring**, and then **Health and Safety**, and then **Obtain Incident Information**, and then **Injury Details BRA**, and then **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.

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

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

Person Involved
1 of 1
[View All](#)

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

Physician/Hospital Information
1 of 1
[View All](#)

*Type of Health Care + -
 Physician ID Philip McCleary
 Medical Facility [View Address](#)
 Phone

Medical Diagnoses
1-1 of 2
[View All](#)

Diagnosis			
K00016 Q	Stress	+	-

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

(IND) India

Field or Control	Description
Type of Disablement	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.

Field or Control	Description
Disablement Code	If the type of disablement is permanent partial disablement or permanent total disablement, select the appropriate code. Disablement codes are defined on the Disablement Types IND (Disablement Types India) page.
Pct Loss of Earnings (percent loss of earnings)	The percentage of loss of earnings for the selected disablement code appears. This percentage is defined on the Disablement Types IND page.
Illness	If the type of disablement is an occupational disease or illness, select the type of illness.
Additional Descr (additional description)	If the type of disablement is due to some other reason, enter a description of the disablement type here.
Type (for Job)	Select if the physician recommended an <i>Alternate Job</i> or <i>Light Work</i> .
Start Date	Enter the start date of the alternate job or light work job.
End Date	Enter the end date of the alternate job or light work job.
Type (for Leave Details)	Select if the physician recommended <i>Accident Leave</i> or <i>Special Leave</i> .
From Date	Enter the start date of the leave.
To Date	Enter the end date of the leave.
Employee ID	Select if an employee approved the physician recommendations and select the employee's ID.
Physician ID	Select if a physician approved the recommendations and select the physician's ID.
Approval Date	Enter the date that the physician's recommendations are approved.

(ESP) Spain

Field or Control	Description
Accident with sick note	The Accident with sick note 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

*Body Part

12

Other types of fractures of bones

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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Field or Control	Description
Type of Medical Assistance	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.

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

Related Topics

- PeopleSoft Human Resources Administer Workforce: Managing Delta Communications

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**, and then **Health and Safety**, and then **Obtain Incident Information**, and then **Injury Details**, and then **Work-Related**
- **Workforce Monitoring**, and then **Health and Safety**, and then **Obtain Incident Information**, and then **Injury Details BRA**, and then **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 1 of 1 [View All](#)

Empl ID KC0017 **Jessica Brown** Empl Record 0
 Date of Birth 02/10/1962 Date of Death Gender Female
 Last Work Date Before Injury Last Worked
 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 1-1 of 1

	*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
☐ Benefits continue 250 characters remaining
 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 ☐ Off Work Vacation Pay
 Work aftr init absence St Dt Work aftr init absence end dt
 Customer Cost Center
 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
Last Work Date Before Injury and LastWorked	If the employee spent time away from work, enter the date and time of the employee's last day at work. Note: (CAN) The Last Work Date Before Injury field is required for reporting to the BC WCB.
Return Date and Return Time	If the employee spent time away from work, enter the date and time of the employee's first day back at work after the incident.
Illness Resulted In	Select from the available options to indicate if the injury or illness resulted in <i>Transfer</i>, <i>Termination</i>, or is <i>Not Applicable</i>.
Work-Related	Select if the incident is work-related.
Employee Return To Work	Select if the employee returned to work after the incident.
Days Away From Work	If the employee spent time away from work as a result of the incident, enter the number of days that the employee is away from work. Note: Some government authorities have very precise definitions of days away from work and restricted workdays. Ensure that you use the definitions that apply to the regulatory region.
Restricted Workdays	Enter the number of days that the employee is able to work within limitations that a doctor established.
Enter Detailed Dates	Select this check box to enable entry of detailed dates. If the box is deselected, only the Days Away From Work and Restricted Workdays fields are editable and the detailed dates grid is not editable. When the box is selected, the detail dates grid is editable and the Days Away From Work and Restricted Workdays fields are automatically updated to show the total days from the detail dates.

Field or Control	Description
Start Date, End Date, and Type	Select from the available options to provide more detail about the time away from work due to an injury. The Days Away from Work and the Restricted Workdays are automatically updated depending on the type that is selected. For example, if the type is <i>Away from Work Due to Injury</i>, the Days Away from Work field is automatically updated with the number of days entered in the Start Date and End Date fields. Important: (USA) When a U.S. employee is terminated, you need to enter the work related end date here for the injury details incident.

(USA) USA

Field or Control	Description
OSHA Days Away As Of Today (occupational safety and health administration days away as of today)	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>. 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.
OSHA Days Restricted/Transferred	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>. 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.

(CAN) Canada

Field or Control	Description
Payments during disability and Payments Descr (payments description)	Select if the employee is receiving payments and then describe the payments in the Payments Descr field.
Benefits continue	Select if the employee's benefits are continuing.
Last Day Scheduled Start Time and Last Day Scheduled End Time	Record information about lost work time.
Last Day's Wages	Enter the wages of the employee's last day.
Shift Diff Premium Amount (shift differential premium amount)	Enter the amount of the shift differential premium.
Differential Premium Ind (differential premium indicator)	Select the unit of measure for the differential premium amount. Valid values are <i>Day</i> and <i>Hours</i> .

Field or Control	Description
Lump Sum Holiday Pay Received	Select if the employee received lump sum holiday pay.
Holiday Pay Rate % (holiday pay rate percent)	If the employee received lump sum holiday pay, enter the pay rate percentage.
Absent after day of injury	Select if the employee missed work after the injury and then enter the Start Date and End Date 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.
Customer Cost Center	Enter the employer's Customer Cost Center code that represents the cost center that the individual is in. The Customer Cost Center code is assigned by the WBC in conjunction with the employer and helps to track claim costs at a given organizational level.
Class/Subclass	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:

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

(DEU) Germany

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

(FRA) France

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

(IND) India

Field or Control	Description
Shift	Select <i>General Shift</i> , <i>Shift One</i> , <i>Shift Two</i> , or <i>Shift Three</i> . 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.
Supervisor ID	Select the employee ID of the employee's shift supervisor.
Start Time and End Time	Enter the employee's shift start and end time.

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.

Long Term Earnings

Help

Long Term Earnings

1 of 1

View All

Sequence Number

1

Amount

+

-

Three Month Wage Duration

Period Start Date

10/01/2008

Period End Date

12/31/2008

Date Change Reason

OK

Cancel

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.

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

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.

Return To Work

×

Help

☐ Employer Consider Return

☐ Modified Work Available

☐ Return to Work At Full Salary

Return To Work

Contact

KC0003

Q

Cynthia Rogers

OK

Cancel

Field or Control	Description
Employer Consider Return	Select to indicate that the employer is considering a graduated return to work for the employee.
Modified Work Available	Select to indicate that modified work is available for the employee.
Return to Work At Full Salary	Select to indicate that the injured employee is to return to work at his or her full salary.
Contact	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.
More than Five Shift Cycles	Select to indicate that there are more than five shift cycles associated with the job.

Employment Term

Field or Control	Description
Short Term Basis	Select if the employee is employed on a short-term basis.
On Call	Select if the employee is employed on an on-call basis.
Less Than Three Months	Select if the employee is employed for less than three months.
Other Employment Service	Select if the employee works for another employment service.
Temporary Basis	Select if the employee is employed on a temporary basis. If you select this radio button, the Start Date and End Date fields become available.
Start Date and End Date	Enter the start date and end date for the employee's temporary employment term.
End Date Unknown	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**, and then **Health and Safety**, and then **Obtain Incident Information**, and then **Injury Details**, and then **Reporting**
- **Workforce Monitoring**, and then **Health and Safety**, and then **Obtain Incident Information**, and then **Injury Details BRA**, and then **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

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

☐ Further Inquiry
☐ Reportable Case
▼ DEU - Germany

Case Number
Case Officer ID
Date Filed
Reject Reason ▼
Employer Social Insurance Nbr

▼ USA

OSHA Case Nbr ☐ Privacy Case
Date Filed
Illness Type Occupational Skin Disease ▼
Log Comments

▼ Australia

Case Number Date Filed

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

Date of Action

Officer Responsible

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	Select if the incident is reportable under the terms of one or more authorities in one or more regulatory regions. Even if there are no regulatory requirements at the location for tracking reportable cases, you can track whether the case is reportable based upon insurer requirements or the requirements of the organization. If you do not need to report this particular case based upon the requirements for the regulatory region, the insurer, or the organization, then deselect the Reportable Case check box.

 **Warning**

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

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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

Field or Control	Description
Case Number	Enter the official report case number. Note: If the government, insurer, or organization uses a standard system for numbering cases, you can set up HR so that it assigns the numbers automatically.
Case Officer ID	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.
Date Filed	Enter the date that the report is filed with the insurer. This information is used in the DEU accident report.
Reject Reason	Select any reason that the insurer gave for rejecting the claim, if applicable.

(USA) United States

Field or Control	Description
OSHA Case Nbr (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).
Privacy Case	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.
Date Filed	Enter the date that the reportable case is entered into the OSHA Form 200 Injury and Illness Recordkeeping Log.
Illness Type	If the person has a work-related illness, select an appropriate type of illness. OSHA defines these illness types.
Log Comments	You can enter comments that are exactly the length of the field as it appears on the page. This length matches the length for comments on the OSHA Form 200 Injury and Illness Recordkeeping Log.

(AUS) Australia

Field or Control	Description
Case Number	Enter the case number.

(NZL) New Zealand

Field or Control	Description
Case Number	Enter the case number.

(IND) India

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

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, and then **Health and Safety**, and then **Obtain Incident Information**, and then **Injury Details BRA**, and then **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

Injury Details

Empl ID
Non-Empl ID
Date of Birth
Date of Birth
Area Type Urban
*INSS Type Employee
Worked Hours
*CID Code
☐ Retired

Empl Record 0
Gender
Gender

CAT Information

*CAT ID
*Date 08/01/2016
CAT Type
eSocial Accident Tp
Death Date
CNES

☐ CAT Partial
☐ Certificate of Death
☐ Death

This example illustrates the fields and controls on the Details BRA page (2 of 2).

Last Work Date
Absence Indicator
CAT Register ID
Diagnosis Information
Details

Last Worked
CAT Register Date 10/26/2022

Issued Data

*Issued by
*Date From 10/26/2022
Location

Monthly Salary Type

☒ Job Monthly Pay Rate ☐ Job Rate Code ☐ 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> .

Field or Control	Description
INSS Type	Valid values are <i>Employee</i> , <i>Medical Doctor</i> , <i>Non-Employee</i> , and <i>Special Security</i> .
Worked Hours	Enter the number of hours this employee worked prior to the injury.
CID Code	Enter the international disease code related to this injury. Valid values are defined in the CID Code BRA table. This code is used in CAT reporting (<i>BRCAT01</i> SQR report).
Retired	Select if the employee is retired.

CAT Information

Field or Control	Description
CAT ID and Date	Enter the work risk ID and date. To add a new row to the CAT Information section, the (CAT) date entered must be later than all the rows that are available. Note that when you delete a row from this section, the system only allows the row with the latest date to be deleted.
CAT Type	Enter the work risk type. Valid values are <i>Death Communication</i> , <i>Initial</i> , and <i>Reopened</i> . Note: 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.
CAT Partial	Select to use only part of the Details BRA page to record CAT information. When selected, the Medical Treatment section, Diagnostic Information and Details fields do not display. The system generates a mapping error in eSocial if this option is selected.
Certificate of Death	Select if a death certificate has been issued.
eSocial Accident Tp (eSocial accident type)	Specify the accident type for the injury. This information is used in eSocial reporting. Accident type eSocial codes are defined on the Accident Type eSocial BRA Page .
Death and Death Date	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.
CNES	Enter the code of the National Register of Health Facility (7 alphanumeric characters).
Absence Indicator	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.
CAT Register ID and CAT Register Date	Enter the work risk register ID and date related to this injury.

Field or Control	Description
Diagnosis Information and Details	Enter diagnosis information of the injury. These fields appear if the CAT Partial 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.

Field or Control	Description
Date and Time	Enter the date and time when the employee received health care treatment.
Type of Health Care	Select the type of health care that the employee received at the hospital or clinic. Valid values are: <i>1st Treatment (Physician)</i> <i>Company Physician</i> <i>Emergency Care</i> <i>Family Physician</i> <i>Further Treatment (Hospital)</i> <i>Further Treatment (Physician)</i> <i>Hospital</i> <i>Ongoing Health Care</i> <i>Specialist</i>
Physician ID	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. Physicians are defined using the Physician BRA (HS_PHYSICIAN_BRA) component. See Also Defining Medical Services Information
Physician Name, Organ Statutory, Register Number, Country and State	If the physician is not defined in the system, enter this physician information manually.
Medical Facility	Select the medical facility to which the injured or ill employee was taken. Values come from the Medical Facilities table.
CID Code	Enter the international disease code related to this injury. Valid values are defined in the CID Code BRA table. This code is used in the eSocial S-2210 reporting.
Days of Treatment	Enter the number of days the injured employee received treatment.
Absence Begin Date	Enter the date that the employee begins to be absent from work due to the work accident.

Field or Control	Description
Absence End Date	Enter the date that the employee's absence from work ends due to a medical discharge or death of the employee.

Issued Data

Field or Control	Description
Issued by, Date From, and Location	Valid issued by values are <i>Authority Public</i> , <i>Doctor</i> , <i>Employer</i> , <i>Seg o Depend</i> , and <i>Union</i> .
Initiative Issued	Select the reason the injury report was initiated. This field appears if the <i>Employer</i> is selected in the Issued by field. Values are <i>Court Order</i> , <i>Determined by Supervisory Org</i> , and <i>Employer Initiative</i> (default value).

Monthly Salary Type

Field or Control	Description
Job Monthly Pay Rate, Job Rate Code, or Other	Select the monthly salary type that applies: Job Monthly Pay Rate Job Rate Code: Select if the monthly salary type should be a specific compensation rate code. Other: Select if the monthly salary type is none of the above.
Comp Rate Code (compensation rate code)	Select the applicable compensation rate code from the Comp Rate Code table. This field appears if the Job Rate Code option is selected.
Monthly Salary and Currency Code	Enter the monthly salary amount and its related currency. These fields appear if the Other option is selected.

Related Topics

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

Entering Incident Data for Vehicles and Equipment

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

Pages Used to Enter Incident Data for Vehicles and Equipment

Page Name	Definition Name	Usage
Vehicles/Equipment Involved Page	HS_INC_VEHICLE	Enter the specifics of incidents involving vehicles or equipment.

Page Name	Definition Name	Usage
Vehicles/Equipment Involv MEX Page	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. The Equipment Details 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. The Car Details 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, and then **Health and Safety**, and then **Obtain Incident Information**, and then **Vehicles/Equipment Involved**, and then **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
Type
Business Unit GBIBU Global Business Institute BU
Dept Charged
*Currency USD

Equipment Details
Car Details

Estimated Damage Amount
Vehicle/Equipment
Property

Actual Damage Amount
Vehicle/Equipment
Property

USA ☐ DMV Reported ☐ DOT Reported

Involved People 1-1 of 1 View All

	Empl ID	Non-Empl ID	*Role
1	Q	Q	Q + -

Field or Control	Description
Property Code	Select a property code from the values that you classify as vehicles or heavy equipment in the Company Property table. For vehicles, the system makes the Car Details link available. For heavy equipment, the system makes the Equipment Details link available. Click the links for the associated pages.
Business Unit and Dept Charged (department charged)	If you assign this company property to a business unit and department in the Company Property table, the business unit and department that is charged for the incident appears here. Otherwise, select the business unit, if needed. The values come from the Business Unit table. Select the department charged, if needed. The values come from the Department table.
Estimated Damage Amount	Enter an estimated damage amount for the vehicle or equipment and any other property that is damaged in the incident, if an estimate is provided.
Actual Damage Amount	Enter an actual damage amount for the vehicle or equipment and any other property that is damaged in the incident, when that information is known.

(USA) USA

Field or Control	Description
DMV Reported (Department of Motor Vehicles reported)	Select if the incident is reported to the state Department of Motor Vehicles.
DOT Reported (Department of Transportation reported)	Select if the incident is reported to the federal Department of Transportation.
Empl ID (employee ID) and Non-Empl ID (non-employee ID)	Identify the employees or non-employees that are associated with the vehicle or heavy equipment that is involved in the incident.
Role	Indicate the role of each person that is involved in the accident.

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, and then **Health and Safety**, and then **Obtain Incident Information**, and then **Vehicles/Equipment Involv MEX**, and then **Vehicles/Equipment Involv MEX**

This example illustrates the fields and controls on the Vehicles/Equipment Involv MEX page. You can find definitions for the fields and controls later on this page.

Vehicles/Equipment Involv 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			

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:

Field or Control	Description
External	Select if the vehicle or heavy equipment to be reported is not available in the system as company property. When selected, the system displays the Tag/Serial Number and Comments fields for you to enter free text about the property. It hides the Property Code and Type fields, as well as the Equipment Details , and <i>Car Details</i> links.
Tag/Serial Number and Comments	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

Page Name	Definition Name	Usage
Corrective Page	HS_INC_ACTION_CRCT	Enter corrective and preventive actions.

Page Name	Definition Name	Usage
Preventive Page	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, and then **Health and Safety**, and then **Obtain Incident Information**, and then **Corrective/Preventive Actions**, and then **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

*Hazard

*Cause

+ -

Consequent Actions

*Action Sequence 1

Responsible ID

Category

*Status Recommended

Action

+ -

Completion Date

Estimated

Actual

Germany

Corrective Actions

Field or Control	Description
Hazard	Select a code from the values that come from the Hazardous Materials/Conditions table. The value that is associated with the selected hazard appears in the Cause field.
Action Sequence	The system automatically assigns the action sequence in numerical order for each data row that you insert.
Responsible ID	Select the ID of the employee who is responsible for following through on the action.
Category	Select a category for the action.
Status	Enter the status of the action.
Action	For each action sequence, you can enter a description.
Estimated and Actual	When you know them, enter the estimated, actual, or both completion dates for carrying out the action.

Note

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

(DEU) Germany

Field or Control	Description
Corrective Actions	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, and then **Health and Safety**, and then **Obtain Incident Information**, and then **Corrective/Preventive Actions**, and then **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.

Corrective

Preventive

Incident Number 19240003 Date 05/18/2002 Incident Type Vehicle/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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Field or Control	Description
'Other' Description	This field is available only to users in British Columbia when they enter the preventative action code 00996. Users in British Columbia may enter descriptions of nonstandard preventative actions, which are then used in reports to the British Columbia Workers Compensation Board (BC WCB). Users in British Columbia must first ensure that the preventative action codes that are entered in the CAN Preventative Actions table are the approved codes that are used by the BC WCB, including the code 00996 - Other. If you are a user in British Columbia, and if the approved codes are entered into that table and the incident that you are currently working with has the Regulatory Region CANBC applied to it, then when you select a Preventative Action code of 00996 - Other in the Preventative Action field on this page, the 'Other' Description field is available for data entry. Enter a description of the nonstandard preventative action.

Note

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

(DEU) Germany

Field or Control	Description
Preventative Action	For each action, select the appropriate action from the values which come from the GER Preventative Actions Table.

Tracking Incident, Injury, and Illness Data by Individual

This section 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

Page Name	Definition Name	Usage
Review Employee Injury Summary Page	INJURY_SUMMARY	View a summary of all the injuries that an employee has experienced and related incident data.

Page Name	Definition Name	Usage
Review Injury Summary BRA	INJURY_SUM_BRA	(BRA) View a summary of all the injuries that an employee has experienced and related incident data for Brazil. This page is identical to the Review Employee Injury Summary page.

Related Topics

- [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.

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, and then **Health and Safety**, and then **Obtain Incident Information**, and then **Review Employee Injury Summary**, and then **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
 Business Unit India Business Unit
 Department Human Resources
 Job Code Trainee - Management
 Location M G Road, Branch
 Empl ID KP0003 Empl Record 0
 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	Show Details	Y

Field or Control	Description
Show Details	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. Save the changes before you close the pages.

(GBR) Collecting RIDDOR Data for UK reports

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

Page Used to Run the Collect RIDDOR Data Process

Page Name	Definition Name	Usage
Collect RIDDOR Data	RUNCTL_OHS_UK	Collect RIDDOR data for GBR Health and Safety reporting.

Related Topics

- Application Fundamentals: Monitor Health and Safety Reports

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

Page Name	Definition Name	Usage
Mixed Committee MEX Page	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, and then **Health and Safety**, and then **Collect Health/Safety Data**, and then **Mixed Committee MEX**, and then **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 Committee Trabajo

Committee Detail

*Effective Date05/26/2020

*StatusActive

+ -

*Description

Short Description

*Year

*Constitution Date05/26/2020

*ClassHealth & Safety

Representative

*Empl ID

+ -

*Status Date05/26/2020

*StatusActive

*TypeEmployee

Location

*Business Unit

+ -

*Location Code

Objective Detail

*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 & Safety</i> and <i>Training</i> .

Representative

Define details for mixed committee representatives.

Field or Control	Description
Empl ID	Select the employee ID of the representative for the mixed committee.

Field or Control	Description
Type	Identify the type of representative. Values are <i>Employee</i> and <i>Employer</i> .

Location

Field or Control	Description
Business Unit	Select the business unit that the mixed committee serves.
Location Code	Identify the location where the mixed committee is available.

Objective Detail

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

Field or Control	Description
Objective Year	Enter the year in which the mixed committee's objectives are effective.
Sequence	If you have more than one objective, you can identify each objective by assigning it a sequence number.
Type	Select the objective type. Values are: • <i>Function</i>: An activity that a mixed committee needs to do. • <i>Mechanism</i>: The way to achieve the functions or goals of a mixed committee. • <i>Objective</i>: The goals of the period in which the committee is valid. • <i>Other</i>: Any other information that you need to enter about the mixed committee.
Objective	Enter the objective of the mixed committee.
Description	Enter a description for the function, mechanism, objective, or other objective type.

6

Processing Rehabilitation, Claims, and Examination Data

Managing Claims

This section provides an overview of claims management and reports.

Pages Used to Manage Claims

Page Name	Definition Name	Usage
Claim Details Page	HS_CLAIM_MGMT1	Open claims.
Appeal Details Page	HS_CLAIM_APPL_SEC	Enter details about the claim appeal.
Claim Charges Page	HS_CLAIM_MGMT2	Track charges related to injury claims, including one-time medical treatments and lengthy, multiple claim-incurred costs.
Payments and Deposits Page	HS_CST_IND_SEC	(IND) Enter specific information about claim payments.
Claim Provider Page	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 Topics

- Application Fundamentals: Monitor Health and Safety Reports

Claim Details Page

Use the Claim Details page (HS_CLAIM_MGMT1) to open claims.

Navigation:

Workforce Monitoring, and then **Health and Safety**, and then **Obtain Incident Information**, and then **Open Claim**, and then **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

Claim Number 00094000

*Date Opened 06/24/2000

Date Closed

Claim Status

☒ Pending ☐ Approved ☐ Denied ☐ Withdrawn

Person Filing

Empl ID KC0005

Catherine Moore

Incident Data

Incident Number 00000011

Incident Date 06/15/2000

Appeal Data

Type Incident

☐ 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

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.

Field or Control	Description
Claim Status	Select whether the claim status is <i>Pending</i> , <i>Approved</i> , <i>Denied</i> , or <i>Withdrawn</i> .
Date Opened	The date the claim is opened appears. By default, this is the current date, which you can change if needed.
Date Closed	Enter the date that the claim is resolved.
Person Filing	Select either an Empl ID or a Non-Empl ID for the person filing.

Incident Data

Field or Control	Description
Incident Number	Select an incident number to associate with the claim. The system prompts you only with incidents that are associated with this individual. When you enter the incident number, the incident date, type, location, state and country appear on the page . You do not have to enter an incident number when you first create a claim. However, you must add an incident and save the information before you can change the Claim Status to Approved .
Appeal Data	If the claim is appealed, click this link to access the Appeal Details page (HS_CLAIM_APPL_SEC).
Investigated	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

Field or Control	Description
(WCB) Claim Number	Enter the Workers' Compensation Board (WCB) claim number .

(FRA) France

Field or Control	Description
Claimant	Select the claimant type.
Recipient	Select the recipient type.

(USA) USA

Field or Control	Description
Case Number	If the claim concerns an incident to which you previously assigned an OSHA Case Number and Date Filed on the Official Report Details - USA page, then the Case Number and Date Filed fields appear in read-only mode.

(IND) India

Field or Control	Description
Certified	Select if a medical officer has certified the claim.
Date of Certification	Enter the date of certification.
Dependent ID	For dependent claims, select the Dependent ID. Once selected, the system populates the Relationship 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.

The screenshot shows a web form titled "Appeal Details" with a close button (X) in the top right corner. A "Help" link is also present. The form contains three input fields: "Date of Appeal" with a calendar icon, "Date Claim Re-Opened" with a calendar icon, and "Appealed By" with a dropdown menu showing "N/A". At the bottom left are "OK" and "Cancel" buttons. A small grid of dots is visible in the bottom right corner of the form area.

Field or Control	Description
Date of Appeal	Enter the date on which the appeal is filed.
Date Claim Re-Opened	Enter the date on which the claim is re-opened.

Field or Control	Description
Appealed By	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, and then **Health and Safety**, and then **Obtain Incident Information**, and then **Open Claim**, and then **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

Claim StatusPending

Incident Number00000011

Incident Date06/15/2000

Created06/24/2000

Close Date

Empl IDKC0005

Catherine Moore

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 To Currency for the User ID in the Operator Preferences Table, then the system uses the base currency that you specified in the Installation Table. (This is also true for the Currency and Total Type fields.)
Type of Charge	Select one: <i>Medical Costs</i> , <i>Other Costs</i> , or <i>Wage Loss</i> . To add more charge types, insert additional data rows.

Claim Details

Field or Control	Description
Charge Date	Enter the charge date for the claim.
Charge Amount	Enter a charge amount. Enter multiple charges for each type by adding new data rows.
Total Type	The total charges for this claim type in the currency specified for the user ID in the Operator Preferences table.

(IND) India

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

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.

✕
Help

Payment Type

1 of 1
View All

* Payment Type

▼

+
-

Payment Details

1 of 1
View All

*Payment Date

05/27/2020

📅

*Amount

*Seq Nbr

1

+
-

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.
Recipient Type	Select if the recipient of the payment is an <i>Employee</i> , <i>Non-Employee</i> , or <i>Dependent</i> . Once selected, select the ID of the employee, non-employee, or dependent. If you select <i>Dependent</i> , the relationship appears.
Comment	Enter an optional comment about the payment.

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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, and then **Health and Safety**, and then **Obtain Incident Information**, and then **Open Claim**, and then **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

Incident Number

00000011

Created

06/24/2000

Empl ID

KC0005

Contact ID

KC0009

Provider Claim Nbr

22346

Claims Manager

Check, Sam

Phone

604 555 9384

Assessment Date

06/15/2000

Comment

Employee has bad back

Claim Status

Pending

Incident Date

06/15/2000

Close Date

Catherine Moore

Stephanie A Mills

Provider Name

Pacific Blue Cross

Disposition

Return with work restrictions

Canada

Contact Address

India

Claim Filed Date

05/27/2020

Claimed Amount

Claim Received Date

Received Amount

Unapproved Amount

Comment

Field or Control	Description
Contact ID	Select a Contact ID (Employee ID Number), if one exists within an organization. Available values come from personal data.
Provider Claim Nbr (provider claim number)	Enter this, if you know it. Typical types of providers are government agencies, such as the Workers' Compensation Board of Canada or insurance companies.
Provider Name	Enter the provider name.

Field or Control	Description
Claims Manager	Enter the name of the claims manager.
Assessment Date	Enter an assessment date.
Disposition	Select the claim disposition from the available values in the list of available options.

Note

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

(IND) India

Field or Control	Description
Claim Filed Date	Enter the date the claim is filed.
Claimed Amount	Enter the amount that is claimed.
Claim Received Date	Enter the date the claim is received by the provider.
Received Amount	Enter the date that the amount is received.
Unapproved Amount	If the amount is an unapproved amount, enter the amount here.
Comment	Enter an optional comment.

Tracking Rehabilitation Plans

This section discusses how to 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

Page Name	Definition Name	Usage
Claims Page	HS_INJ_REHAB1	Associate an incident and essential claims data to rehabilitation plan details for either an employee or non-employee.
Restrictions Page	HS_INJ_REHAB2	Monitor an employee or non-employee's work restrictions and modified duties included in the rehabilitation plan.
Actions Page	HS_INJ_REHAB3	Track the details of actions taken in the rehabilitation plan.
Employee Work Restriction Summary Page	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**, and then **Health and Safety**, and then **Obtain Incident Information**, and then **Create Employee Rehab Plan**, and then **Claims**
- **Workforce Monitoring**, and then **Health and Safety**, and then **Obtain Incident Information**, and then **Create Non-Employee Rehab Plan**, and then **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	<u>Catherine Moore</u>	
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.
Provider Claim Nbr (provider claim number)	Enter the provider claim number.
Assessment Date	Enter the assessment date.
Disposition	Select from the list of available options.

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**, and then **Health and Safety**, and then **Obtain Incident Information**, and then **Create Employee Rehab Plan**, and then **Restrictions**
- **Workforce Monitoring**, and then **Health and Safety**, and then **Obtain Incident Information**, and then **Create Non-Employee Rehab Plan**, and then **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.

Claims

Restrictions

Actions

Empl ID

KC0005

Catherine Moore

Empl Record

0

Incident Type

Incident

Incident Number

00000011

Incident Date

06/15/2000

Work Restrictions

Q

1-1 of 1

View All

Q

From

To

+

-

Work Modifications

Q

1-1 of 1

View All

Q

From

To

+

-

Field or Control	Description
Work Restrictions	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.
Work Modifications	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.
From and To	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**, and then **Health and Safety**, and then **Obtain Incident Information**, and then **Create Employee Rehab Plan**, and then **Actions**
- **Workforce Monitoring**, and then **Health and Safety**, and then **Obtain Incident Information**, and then **Create Non-Employee Rehab Plan**, and then **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

Catherine Moore

Empl Record 0

Incident Number 00000011

Incident Date 06/15/2000

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

Field or Control	Description
Action Sequence	The system assigns each data row with an action sequence in numerical order.
Type	Select an action type from the list of available options.
Responsible ID	If a person within the organization is coordinating the rehabilitation plan, enter or select a responsible ID (employee ID number). The available values come from personal data.
Physician	Select an option from the list of available options. Values come from the Physicians table. Or, if you choose not to enter physicians in the Physicians table, enter the physician's name into the name field.
Provider Description	Enter a description of the provider.
Diagnosis	Select the type of diagnosis in this action. Create these values using the Diagnosis Table page.
Action Status	Change the action status if you are also changing the actual completion date.

Field or Control	Description
Estimated Completion Date	Enter the estimated completion date of the action.
Actual Completion Date	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, and then **Health and Safety**, and then **Employee Work Restriction Data**, and then **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

	Empl ID	Name	Work Restriction Code	Description	Restriction To Date	Incident Number	Incident Date	DETAIL		
☐	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

Page Name	Definition Name	Usage
Physical Exam Address/Phone Page	HS_EXAM_PHYSICAL1	Maintain basic appointment and physician contact information for physical exams.

Page Name	Definition Name	Usage
Physical Exam - Exam Details Page	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.
Audiometric Exam - Exam Details Page	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.
Eye Exam - Exam Details Page	HS_EXAM_EYE2	Maintain exam results, referrals, and comments.
Respiratory Exam Addr/Phone (respiratory exam address/ phone) Page	HS_EXAM_RESPIRE1	Maintain basic appointment and physician contact information for respiratory exams.
Respiratory Exam - Exam Details Page	HS_EXAM_RESPIRE2	Maintain exam results, referrals, restrictions, and comments.
Drug Test Data 1 Page	GVT_DRUG_TEST1	Set up physician and test information for a drug test.
Drug Test Data 2 Page	GVT_DRUG_TEST2	Maintain test results, referrals, and comments.
ASO Exam Results BRA Page	ASO_EXAM_RSLT_BRA	(BRA) Maintain basic ASO exam and physician information.
Biological Monitor Result BRA Page	MONI_BIOL_RSLT_BRA	(BRA) Maintain biological exam and physician information.
Medical Exam Results BRA Page	MED_EXAM_RSLT_BRA	(BRA) Review medical exam results.
Drug Test BRA Page	EMPL_DRUG_TEST_BRA	(BRA) Enter worker's drug test information.

Common Elements Used in Tracking Medical Exam Results

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

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, and then **Health and Safety**, and then **Record Medical Exam Results**, and then **Physical Exam**, and then **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	The next exam date appears by default for the following exam types. You can override the defaults if the actual dates are different. - Annual: Next exam is one year later. - Exposure: Next exam is six weeks later. - Periodic Surveillance: Next exam is six months later.
Physician ID	Select from the available values, which come from the Physician Table. If you select a physician ID, the physician's address information from the Physician Table automatically fills in the address block. You can edit this address.

Field or Control	Description
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

Field or Control	Description
Medical Organization Code	Select the medical organization that completed the physical exam.

Related Topics

- Application Fundamentals: Administering Country Codes

Physical Exam - Exam Details Page

Use the Physical Exam - Exam Details page (HS_EXAM_PHYSICAL2) to maintain physical exam results.

Navigation:

Workforce Monitoring, and then **Health and Safety**, and then **Record Medical Exam Results**, and then **Physical Exam**, and then **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 Zone PST
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		
Q		Q	Q	+	-

Work Modification

1-1 of 1 View All

Modfd Code	Description	From Date	To Date		
Q		Q	Q	+	-

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.
Work Capability	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> .
Regulatory Region	Enter the regulatory region in which the employee works. Select from the available values, which come from the Regulatory Region Table.
Work Restriction	Enter restriction code by selecting an option from the list of prompt values, which are from the Work Restrictions Table. Then enter the From Date and To Date for which the restriction applies.

Field or Control	Description
Work Modification	Enter the modification code by selecting an option from the available values, which come from the Modified Work table. Then enter the From Date and To Date 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, and then **Health and Safety**, and then **Record Medical Exam Results**, and then **Audiometric Exam**, and then **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

Exam Date 05/27/2020

Exam Type

Audiometer Serial Nbr

Baseline

Left Ear

250 500 1K 2K 3K 4K 5K 6K 7K 8K

Decibels

Trouble Frequency

Right Ear

250 500 1K 2K 3K 4K 5K 6K 7K 8K

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, and then **Health and Safety**, and then **Record Medical Exam Results**, and then **Eye Exam**, and then **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

LeftRight

Corrected

Uncorrected

Near Sight

LeftRight

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 Left and Right eyes, both Corrected and Uncorrected .
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 Normal or Abnormal .

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, and then Health and Safety, and then Record Medical Exam Results, and then Respiratory Exam, and then 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.

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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, and then **Health and Safety**, and then **Record Medical Exam Results**, and then **Drug Test Exam Details** , and then **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

*Exam Date05/27/2020

Exam Type

Exam Time In

Exam Time Out

Physician

CountryUSAUnited States

Address

Phone

Next Exam

Union Negotiated

Edit Address

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, and then **Health and Safety**, and then **Record Medical Exam Results**, and then **Drug Test Exam Details** , and then **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 Date05/27/2020

Exam Type

+ -

Exam Results

☐ Pass

☐ Fail

☐ No Show for Exam

☐ Monitoring Required

Referral

Comment

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

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, and then **Health and Safety**, and then **Record Medical Exam Results**, and then **ASO Exam Results BRA**, and then **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 BRABiological Monitor Result BRA

Employee ID KRE0011Empl Record 0Name Ligia Ferreira Vieira da Silva

Medical Exam Details

*PPP Exam Type

*ASO Date

☐ Examination Abroad

Physician ID

Physician Name

*CRM

*Country

*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					Comments

Field or Control	Description
PPP Exam Type	Select the type for the ASO exam. Values are: <i>Job/Position Change</i> <i>New Hire</i> Note: Only one <i>New Hire</i> exam is allowed for the same employee and employee record. <i>Periodical according to PCMSO</i> <i>Return to Work</i> <i>Specific Monitoring</i> <i>Termination</i>
ASO Date	Select the date for the ASO exam. For each PPP exam type selected, the ASO date of the exam result must be unique for the employee.
Examination Abroad	Select if the ASO exam was taken outside of Brazil. If this field is selected, all physician-related fields are no longer displayed on this page. However, you must complete the PCMSO Coordinator section of the Biological Monitor Result BRA Page .
Physician ID	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 Medical Exam Details section. Be sure to specify a physician in the PCMSO Coordinator section of the Biological Monitor Result BRA Page as well. Physicians are defined using the Physician BRA (HS_PHYSICIAN_BRA) component. See Also Defining Medical Services Information .

Field or Control	Description
Physician Name, CRM, Country, and State	If the physician who conducted the exam is not in the system and the physician ID is not available, enter this required information manually. Note: If the employee's country of residence is Brazil, the <i>CRM</i> , <i>Country</i> , and <i>State</i> fields are required.
NIS/PIS	Enter the valid NIS or PIS number of the physician, if the field is editable.
CPF National ID	Enter the valid CPF number of the physician, if the field is editable.
Phone	Enter the phone number of the physician.
Ability to Work	Specify if the employee is able to perform his or her job duties. Values are: <i>Able</i> <i>Able with restrictions</i> <i>Unable</i>
Authorizes to Inform Results	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 Indication of Results field) in the S-2220 event for reporting. 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 Indication of Results field) from the S-2220 event.

Laboratory Exam Details

Field or Control	Description
Laboratory Exam Code	(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. Laboratory exam codes are defined on the Laboratory Exams BRA Page .
Order of Exam	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. 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.

Field or Control	Description
Indication of Results	Enter the result of the exam. Values are: <i>Aggravation</i> <i>Altered or Modified</i> <i>None</i> <i>Normal</i> <i>Stable</i>
Exam Date	(Required) Enter the date that the laboratory exam was conducted, which must be earlier than the ASO date.
Comments	Click to enter the observations for the exam on the Laboratory Exam Comments page (ASO_LAB_DTL_BRA) that appears.

Related Topics

- PeopleSoft Global Payroll for Brazil: S-2220 - Worker Health Monitoring – ASO

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, and then **Health and Safety**, and then **Record Medical Exam Results**, and then **ASO Exam Results BRA**, and then **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

PPP Exam Type

Job/Position Change

ASO Date

Monitoring Results

*Chemical Agent Code

*Analysis Code

*Biological Material

*Excessive Exposition

*Order of Exam

*Indication of Results

1 of 1

View All

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	Specify the chemical agent code, analysis code, and biological material of the ASO exam. 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.
Excessive Exposition	Select <i>Yes</i> if the employee is exposed to an unusually high amount of the selected chemical agent. Otherwise, select <i>No</i>.
Order of Exam	Select: <i>Not Applicable</i> if the exam order is irrelevant. <i>Referential</i> if this is the <i>first</i> ASO exam done for the employee. <i>Sequential</i> for the ASO exams that are performed subsequently.
Indication of Results	Enter the result of the exam. Values are: <i>Aggravation</i> <i>Modified</i> <i>Normal</i> <i>Not Occupational</i> <i>Occupational</i> <i>Stable</i>

PCMSO Coordinator

Field or Control	Description
Physician ID	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 Medical Register Page are available for selection. Physicians are defined using the Physician BRA (HS_PHYSICIAN_BRA) component. See Also Defining Medical Services Information
Physician Name, CRM, Country, and State	If the physician is not in the system and the physician ID is not available, enter this required information manually.
NIS/PIS	Enter the valid PIS or NIS number of the physician.
CPF National ID	Enter the valid CPF number of the physician.

Related Topics

- PeopleSoft Global Payroll for Brazil: S-2220 - Worker Health Monitoring – ASO

Medical Exam Results BRA Page

Use the Medical Exam Results BRA page (MED_EXAM_RSLT_BRA) to review medical exam results.

Navigation:

Workforce Monitoring, and then **Health and Safety**, and then **Record Medical Exam Results**, and then **Medical Exam Results BRA**, and then **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		1 of 1	View All
Type of Exam			
Exam Date	05/27/2020		
Medical Exam Type	☐ Baseline		
PPP Exam Details		1 of 1	View All
Brazilian Exam Type			
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, and then **Health and Safety**, and then **Record Medical Exam Results**, and then **Drug Test BRA**, and then **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			
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
Exam Type	Select the type of the drug test. Values are: <i>Hire</i> <i>Professional Driver</i> <i>Termination</i> Do not enter more than one drug test of the same exam type for the same exam date.
Refused by Employee	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>.
Expected Termination Date	Enter the expected termination date of the employee. This field appears if the Refused by Employee field is selected. 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.
Exam Date	Enter the date when the drug test was taken.
Exam Number	Enter the drug test number. If the selected exam type is <i>Professional Driver</i>, enter the 11-digit drug test number in this format, AA999999999, where AA a 2-digit alphabetical string, and 999999999 a 9-digit numeric string.
Physician ID	Select the name of the employee's physician. Once selected, the Organ Statutory, Register Number and State field values of the physician are populated automatically on the page if available. Physicians are defined using the Physician BRA (HS_PHYSICIAN_BRA) component. See Also Defining Medical Services Information.
Physician Name, Organ Statutory, Register Number, CRM, and State	If the physician is not defined in the system, enter this physician information manually. Organ Statutory: 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>. Register Number: Enter the register number of the selected organ statutory. This field is not shown if the selected exam type is <i>Professional Driver</i>. CRM: Specify the CRM register number. This field appears if the selected exam type is <i>Professional Driver</i>. Note: If the selected exam type is <i>Professional Driver</i>, the CRM and State 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.

Field or Control	Description
Laboratory Provider ID	Select the laboratory from where the drug test was taken. Once selected, its associated CNPJ number is populated automatically on this page. Laboratory providers are defined on the Laboratory Provider Page .
Laboratory and CNPJ Laboratory	If the laboratory is not defined in the system, enter its name and CNPJ number manually.

7

(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
CAT Report BRA Page	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, and then **Health and Safety**, and then **Reports**, and then **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

Note

Create CAT reports using the PeopleSoft Global Payroll for Brazil: CAT Form Page 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 (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, and then **Health and Safety**, and then **Reports**, and then **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.

PPP Report BRA

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:** A group box containing three radio buttons: ☒ No Observation, ☐ Print Observation, and ☐ Override Observation.
- Selection Criteria:** A group box containing four radio buttons: ☒ Select Establishment ID, ☐ Select Department ID, ☐ Select Group ID, and ☐ Select Worker.
- Establishment Data:** A table with one row. The table header is "Establishment Data" and the table body contains "Establishment ID". The table has a search icon, a pagination control showing "1 of 1", and a "View All" link. Below the table, there is a search input field for "Establishment ID" and 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.

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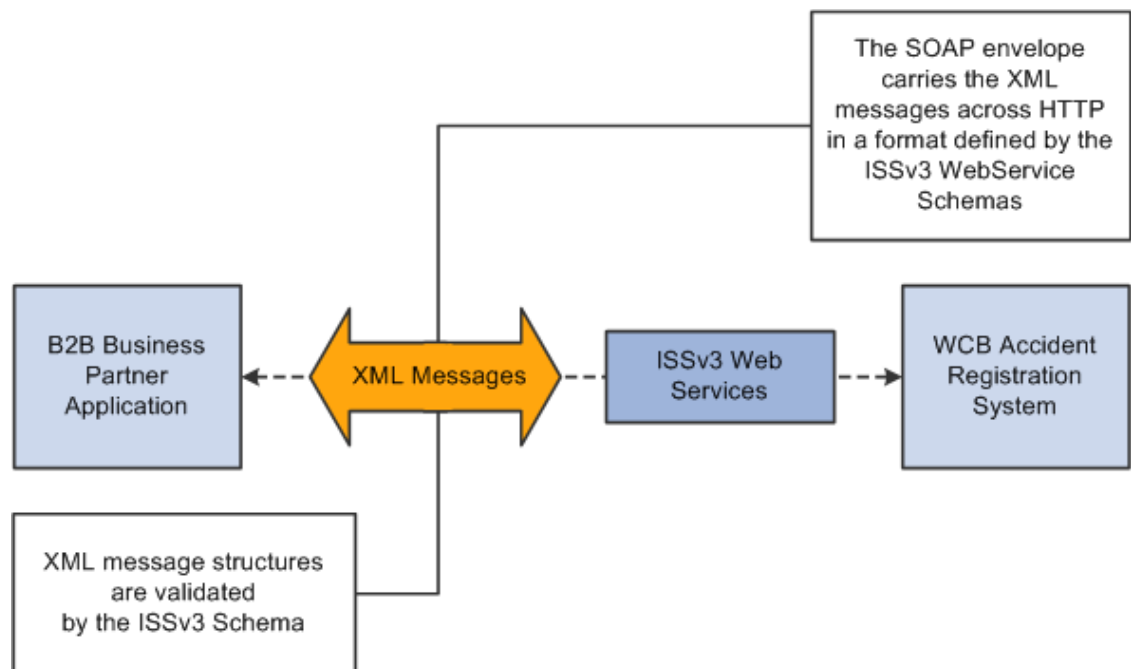
(CAN) Preparing to Report to the Workers Compensation Board

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.asmx> to <https://b2b.online.worksafebc.com/ISSV3/ISSV3.asmx>.
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 Topics

- Application Fundamentals: Establishing Locations

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.

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

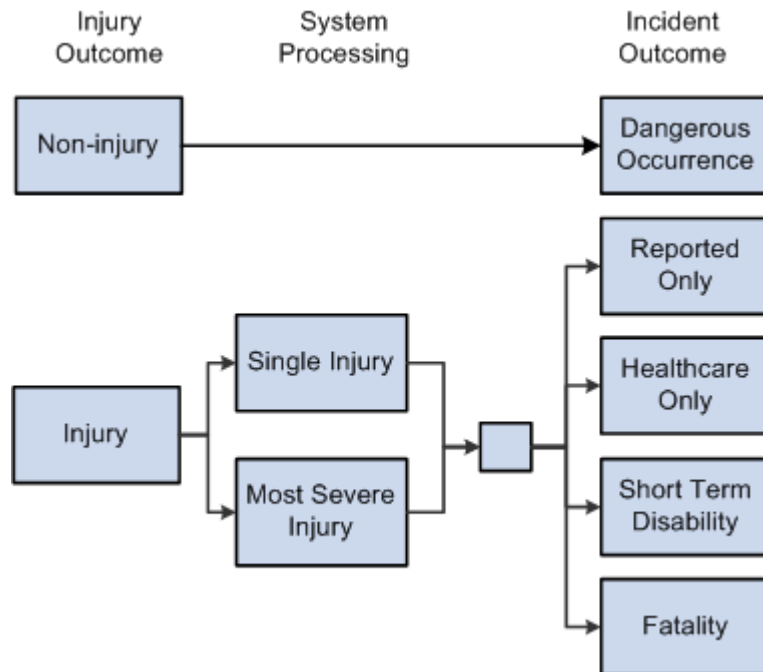
As a general rule, the more severe the incident outcome, the more information that you report to the BC WCB. As the amount of information required for an incident increases, the number of checks carried out by the WCB mainframe system also increases, and so does the number of checks and warnings built into the 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

Page Name	Definition Name	Usage
Register Employer Web Service Page	WCB_WEB_REG_DTLS	Enter employer WCB registration details.
Employer-Related Codes Page	WCB_EMPLR_REL_CD	Request employer codes.
System Codes Page	WCB_SYSTEM_CD	Request system codes.
Extract WCB Injury Data CAN Page	RUNCTL_WCB_501	Run the OHS501BC SQR process to populate staging tables with WCB injury data.
Submit Injury Report Page	INIT_BC_WCB_WEB	Create and transmit injury reports.
Review Error Messages Page	WCB_INJ_ERR_RESP	Review error messages received from the WCB.
Request Submission Status Page	WCB_SUB_STAT	Request submission status.

Page Name	Definition Name	Usage
Review Submission Status Page	WCB_INC_SUB_STAT	Review the submission status of an injury report.
Review Success Messages Page	WCB_INJ_RPT_RESP	Review success messages received from the WCB.

Understanding WorkSafeBC's Web Service Processes

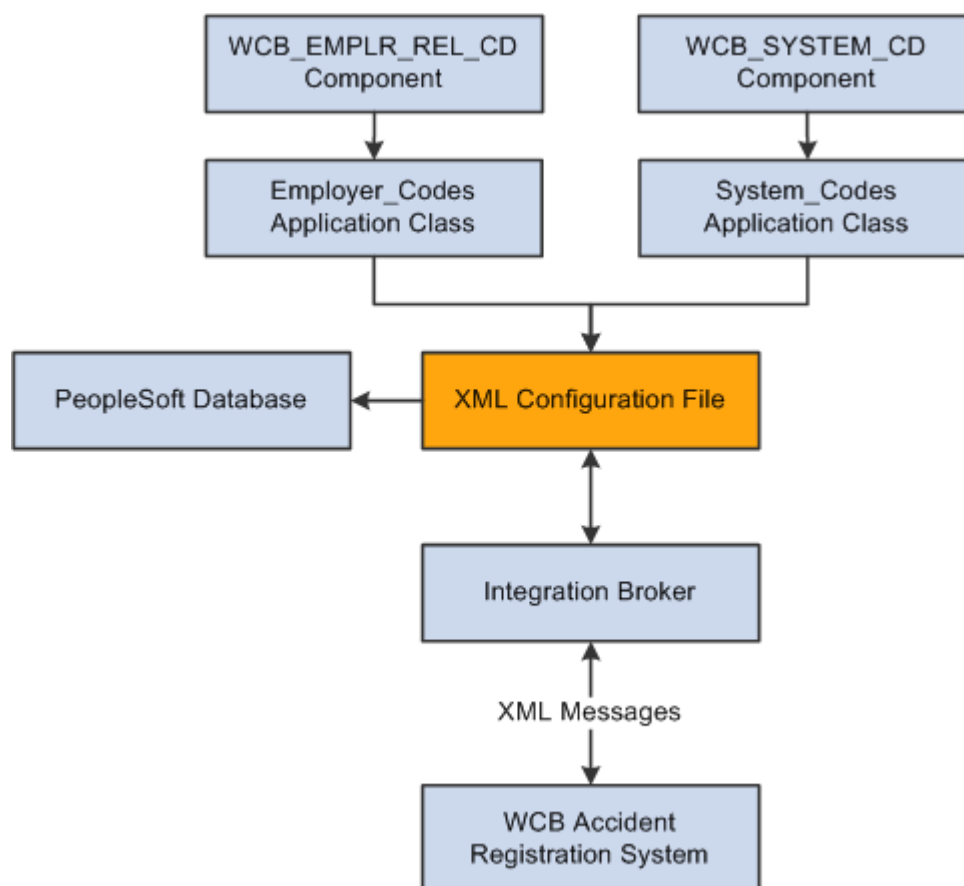
Using the WorkSafeBC web service you can:

- 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.



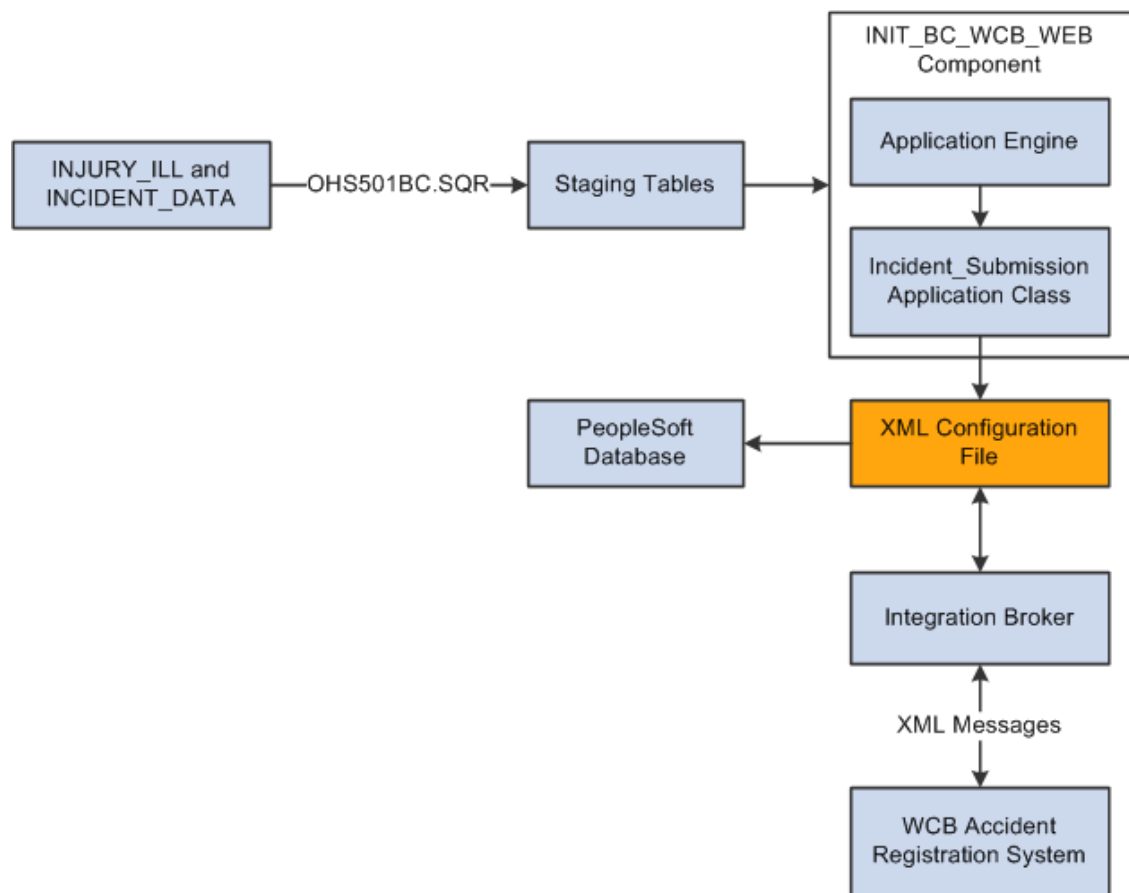
1. Using the WCB_EMPLR_REL_CD or WCB_SYSTEM_CD component, you initiate the Employer_Codes or System_Codes application class, respectively.

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.



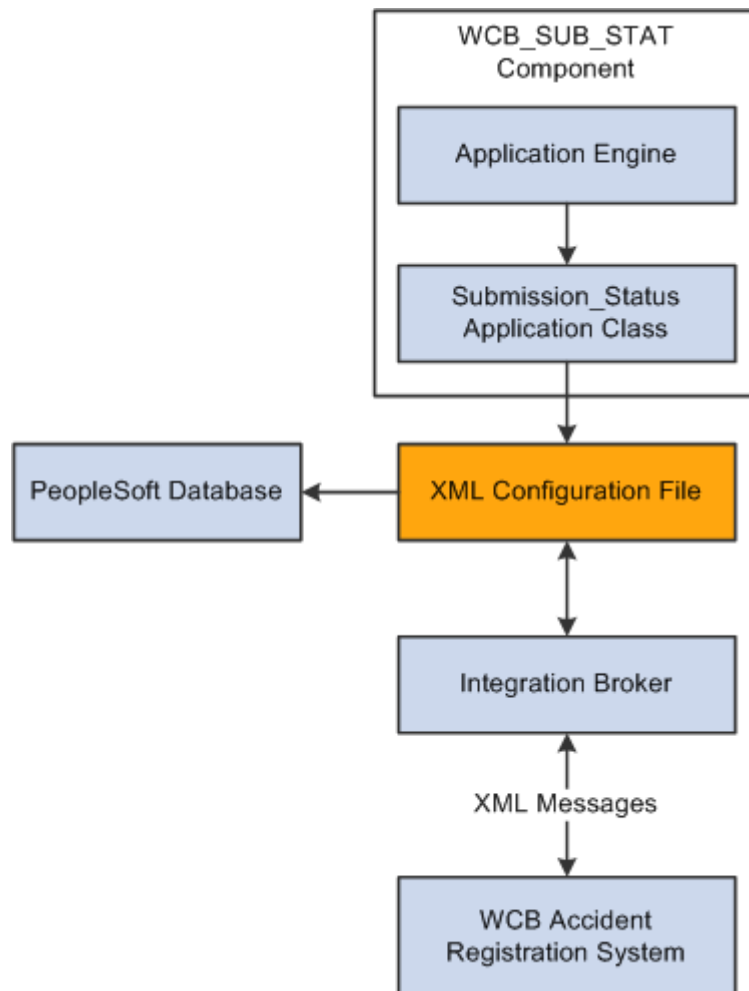
1. You initiate the OHS501BC.SQR process to collect injury and incident data from the INJURY_ILL and INCIDENT_DATA tables and use it to populate staging tables. The process collects the following types of data:
 - Incident/injury data.
 - Corrective preventative actions.
 - Non-employee information.

- 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.
 4. 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.



1. Using the WCB_SUB_STAT component, you initiate the Submission_Status application class.
2. 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.
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.

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, and then **Product Related**, and then **Workforce Monitoring**, and then **Health and Safety**, and then **WCB Web Service CAN**, and then **Register Employer Web Service**, and then **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

	*WCB Employer ID	*Business Partner Identifier	*Business Partner Type	*Business Partner Token		
1					+	-

Field or Control	Description
WCB Employer ID	Enter the employer ID assigned by the WCB.
Business Partner Identifier	Enter the six-digit WCB account number.
Business Partner Type	Enter the role type assigned to the employer during web service registration.
Business Partner Token	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, and then **Product Related**, and then **Workforce Monitoring**, and then **Health and Safety**, and then **WCB Web Service CAN**, and then **Employer-Related Codes**, and then **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-Related Codes

Employer ID ☐ Select All Employer IDs

Employer-Related Codes | < 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 Start Date and End Date 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 Start Date and End Date 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, and then **Product Related**, and then **Workforce Monitoring**, and then **Health and Safety**, and then **WCB Web Service CAN**, and then **System Codes**, and then **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

Q

*System Category

▼

☐ Select All System Categories

Request System Codes

Clear

System Codes

Q

|

◀

▶

1 of 1

▶

▶

View All

System Category

Effective Date

Details

Q

◀

▶

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 Select All System Categories 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.
System Code	Displays the system codes of the system category that you select.
Description	Displays the description of the system code.
Start Date	Indicates the date on which the system code became active.
End Date	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, and then **Health and Safety**, and then **Collect Health/Safety Data**, and then **Extract WCB Injury Data CAN**, and then **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		+	-

(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

Field or Control	Description
Employer ID	Enter the employer ID assigned by the WCB.

Field or Control	Description
Operating Location	Enter your organization's operating location ID.
Name of Person Transmitting	Enter the name of the primary point of contact for the transmitting organization.
Phone Number	Enter the phone number of the primary point of contact for the transmitting organization.
Phone Extension	Enter the phone extension of the primary point of contact for the transmitting organization.
Email ID	Enter the email address of the primary point of contact for the transmitting organization.
Date Transmitted	Enter the date on which the injury report data was extracted.
Time	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, and then **Health and Safety**, and then **WCB Web Services CAN**, and then **Submit Injury Report**, and then **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 ID 223344

[Submit Injury Report](#)

Injury Report Details

	*Incident Number	Event Report Type	Resubmission	Transaction Identifier	Message Status	Details
☐	1		☐			Details + -

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.

Field or Control	Description
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, and then **Health and Safety**, and then **WCB Web Services CAN**, and then **Monitor Web Services**, and then **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, and then **Health and Safety**, and then **WCB Web Services CAN**, and then **Monitor Web Services**, and then **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				View Submission Status	+	-

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.
View Submission Status	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, and then **Health and Safety**, and then **WCB Web Services CAN**, and then **Monitor Web Services**, and then **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:

Submission Status Code	Submission Status Message	Description
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:

Claim Status Code	Claim Status Message	Description
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.
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, and then **Health and Safety**, and then **WCB Web Services CAN**, and then **Monitor Web Services**, and then **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

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 Topics

- Application Fundamentals: Monitor Health and Safety Reports

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

Page Name	Definition Name	Usage
Employee Checklist Page	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 PeopleSoft Human Resources Administer Workforce: Understanding Checklists.

Employee Checklist Page

Use the Employee Checklist page (HS_EMPL_MEDCHK_GER) to view and update medical examination dates and status.

Navigation:

Workforce Monitoring, and then **Health and Safety**, and then **Details DEU**, and then **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 1 of 1 View All

Checklist Date 05/27/2020 Checklist + -

Responsible ID

Comment

Checklist

Sequence	Item	Description	*Briefing Status	*Status Date		
			Initiated	05/27/2020		

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

Field or Control	Description
Briefing Status	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

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

Illness Profile

Job Details

Job-Related Cause

Payment/Work

Medical Details

>

Empl ID

KDG015

Marcus Eli-Ben-Amar-Dea

Empl Record

0

Profile

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1 of 1

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View All

Illness Number

1001

+

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*Regulatory Region

DEU

Q

Case Officer ID

Q

Occ Illness

Q

Disease Class

☐ Incident Related

Incident Number

Illness Start Date

Result

▼

Symptoms

Coughing, muscle pain, chills

Checkup Results

Flu

147 characters remaining

Field or Control	Description
Illness Number	You may either enter an illness number or let the system assign one when you save. Note: To prevent having two sets of numbers and to avoid confusion, PeopleSoft recommends that you either always enter the illness number or always let the system assign numbers automatically. If an individual has more than one illness, then insert additional data rows to add additional illnesses.
Regulatory Region	Select the regulatory region.
Case Officer ID	Select a case officer ID, which is the employee identification number of a person assigned as a case officer of the type <i>Company Physician</i> for this individual's setID and location. 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.
Occ Illness (occupational illness)	Select an occupational illness code; these values come from the Occupational Illness table.

Field or Control	Description
Disease Class	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.
Incident Related	Select this check box to indicate that the illness is incident related.
Incident Number	If you select the Incident Related check box, this field is available for entry. Define incident numbers using the Incident Details component.
Illness Start Date	Enter the illness start date.
Result	Select a value from the list of available options: <i>Not Applicable</i> , <i>Terminate</i> , and <i>Transfer</i> .
Symptoms	Enter a brief description of the illness.
Checkup Results	Enter exam results.

Job Details Page

Use the Job Details page (HS_ILLNESS2_GER) to describe employee circumstances.

Navigation:

Workforce Monitoring, and then **Health and Safety**, and then **Details DEU**, and then **Illness Tracking**, and then **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
Job Details
Job-Related Cause
Payment/Work
Medical Details
>

Empl ID KDG015
Date of Birth 11/01/1984

Marcus Eli-Ben-Amar-Dea
Date of Death

Empl Record 0
Gender M

Job Data

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1 of 1

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View All

Illness Number 1001

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Employee Job Data

Dept ID	21600	Sales & Services	Terminated
Job Code	750000	Recruiter	

☐ 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.

Field or Control	Description
Illness Number	You can insert a new row to add information for another illness. Enter the illness number on the Illness Tracking - Illness Profile page.
Current Job	If the individual is a non-employee, enter a brief description of the current job.
Owner Partner	Select this check box, if appropriate; Partner and Relation check boxes then become unavailable for data entry.
Partner	Select this check box, if appropriate; Owner Partner and Relation check boxes then become unavailable for data entry.
Incompetent	Select this check box, if appropriate.
Relation	Select this check box, if appropriate; Owner Partner and Partner check boxes then become unavailable for data entry. When you select the Relation check box, the associated relationship field appears. Specify the person's family relationship by selecting an option.

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, and then **Health and Safety**, and then **Details DEU**, and then **Illness Tracking**, and then **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 Profile

Job Details

Job-Related Cause

Payment/Work

Medical Details

>

Empl ID

KDG015

Marcus Eli-Ben-Amar-Dea

Empl Record

0

Job-Related Cause

Q

|

1 of 1

View All

Illness Number

1001

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☐ Use Current Job Details

Job Code

Q

From

To

Current Job

Work Responsible

Work Dangers

Comment

Field or Control	Description
Use Current Job Details, Job Code, and Current Job	If the individual is an employee and you select the Use Current Job Details check box, the employee's most current job data appears in the Job Code and Current Job fields. These fields are then unavailable for data entry. If the individual is an employee and you do not select the Use Current Job Details check box, then you must enter the Current Job information directly into the field. For non-employees, the Use Current Job Details check box and Job Code field are unavailable for data entry. You can enter information directly into the Current Job field.
From and To	Enter the dates for the individual's job.
Work Responsible and Work Dangers	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, and then **Health and Safety**, and then **Details DEU**, and then **Illness Tracking**, and then **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.

Illness Profile

Job Details

Job-Related Cause

Payment/Work

Medical Details

Corrective Actions

>

Empl ID

KDG015

Marcus Eli-Ben-Amar-Dea

Empl Record

0

Payments/Work Details

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◀

1 of 1

▶

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View All

Illness Number

1001

+

-

Payments

☐ Payments Continue

Until Date

Work

☐ Work After Start

Start Date

Work Stop

Stop Date

Patient's Residence

Payments

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

Work

Field or Control	Description
Work After Start	Select if the employee has resumed working after an illness.
Start Date	If you selected the Work After Start check box, enter the date that the employee resumed work.
Work Stop and Stop Date	Indicate when the employee stopped work by selecting a value from the list of available options and then enter the corresponding date.
Patient's Residence	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, and then **Health and Safety**, and then **Details DEU**, and then **Illness Tracking**, and then **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
Autopsy	Select this check box if an autopsy is performed.
Fatality	If the individual died as a result of the occupational illness, select this check box.
Date	Enter the autopsy date.
Physician	Enter the name of the physician who performed the autopsy.
Result	Enter the autopsy result.

Physician/Hospital Information

Field or Control	Description
Type of Health Care	If the individual received health care, enter the type of health care from the list of available options.
Physician ID	Select a physician ID (non-employee ID). This data comes from the Physicians table. When you select a physician, the physician's name appears.

Field or Control	Description
Medical Facility	Select a medical facility code from the list of available options. This data comes from the Medical Facilities table. When you select a medical facility, the facility name appears.
Edit Address	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	
Field or Control	Description
Diagnosis	For each medical diagnosis provided by a physician, select a diagnosis code from the list of available options. These values come from the Diagnosis table. If there are multiple medical diagnoses, insert a data row to add a diagnosis code for each.

Corrective Actions Page

Use the Corrective Actions page (HS_ILLNESS6_GER) to enter the causes and corrective actions for occupational illnesses.

Navigation:

Workforce Monitoring, and then **Health and Safety**, and then **Details DEU**, and then **Illness Tracking**, and then **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 Profile

Job Details

Job-Related Cause

Payment/Work

Medical Details

Corrective 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 Cause 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.
Corrective Actions	Select a code from the list of available options. These values come from the Correct. Actions Table DEU (corrective actions table DEU).
Responsible ID	Select or enter the ID of the employee who is responsible for following through on the action.
Action	Enter a description for the corrective action.

Completion Date

Field or Control	Description
Estimated and Actual	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, and then **Health and Safety**, and then **Details DEU**, and then **Illness Tracking**, and then **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

Page Name	Definition Name	Usage
Case Officer Assignment Page	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, and then **Health and Safety**, and then **Details DEU**, and then **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

Effective Date 02/01/2001

Effective Sequence 0

1 of 2

View All

Case Officers

1-1 of 1

View All

Officer Type	Case Officer ID	Form Officer
		☐ + -

Case Officers

Field or Control	Description
Officer Type	Select a type for the case officer from the list of available options.
Case Officer ID	You can select from the list of case officers who are assigned to this employee's setID and location in the Case Officer Table DEU. Note: 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.
Form Officer	If the officer type is <i>Company Physician</i> and you select the Form Officer check box, then this case officer is used in the German Illness report for illnesses. If the officer type is <i>Health and Safety Specialist</i> and you select the Form Officer check box, then this case officer is used in the German Accident Report for incidents that are injuries and fatalities.

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

Page Name	Definition Name	Usage
Illness Report	RUNCTL_OHS504GR	Collect illness data for generating the Illness report (OHS004GR). 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.

Working with Health and Safety Using Fluid

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.

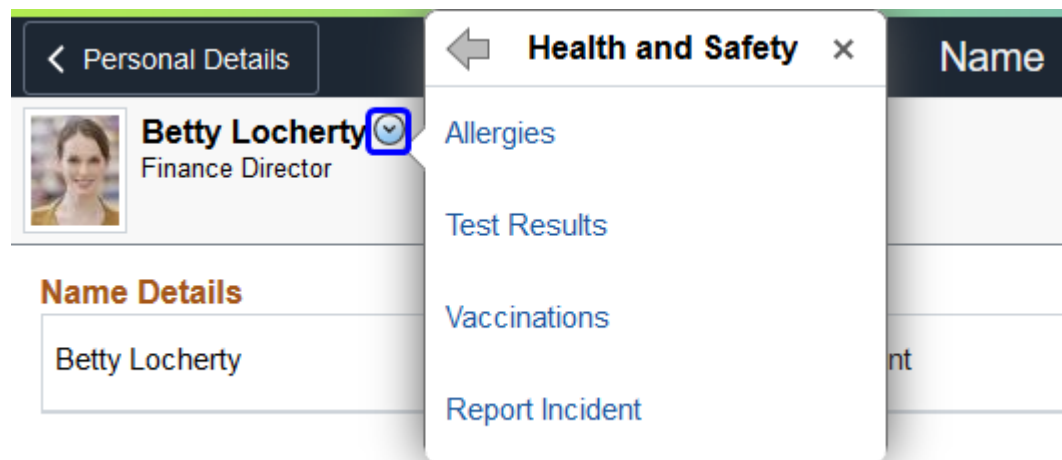
See [Reporting Allergies as Employees](#).

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 PeopleSoft eProfile: Personal Details Tile, 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 Enterprise Components: Understanding Notification Composer.

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 Topics

- [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.
- Application Fundamentals: Configuring Approval Transactions
- Enterprise Components: Managing Activity Guide Templates

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 Application Fundamentals: Understanding PeopleSoft Fluid User Interface Homepages.

Pages Used to Manage Health and Safety Tasks as Administrators Using Fluid

Component or Page Name	Definition Name	Usage
Manage Health and Safety Tile	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.
Manage Health and Safety Dashboard	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](#)

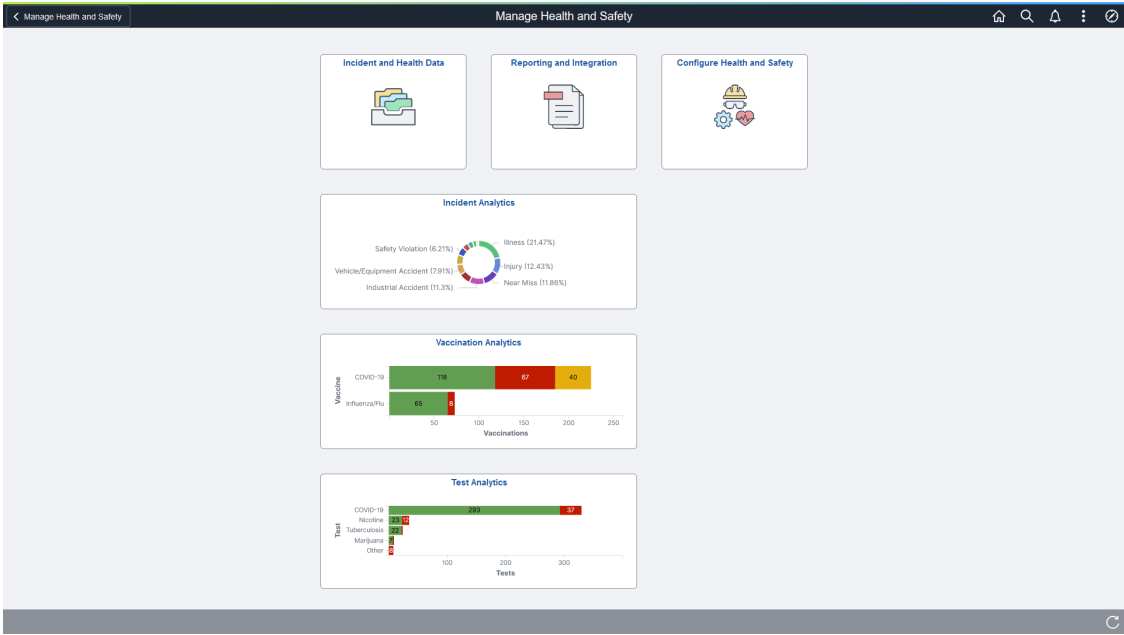
Manage Health and Safety Dashboard

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
Incident and Health Data Tile	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.
Reporting and Integration Tile	Access the Reporting and Integration navigation collection to gather report data and run Health and Safety reports for supported country extensions.
Configure Health and Safety Tile	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.
Incident Analytics Tile	Access the Incident Analytics dashboard to view and analyze incident data using visualizations.
Vaccination Analytics Tile	Access the Vaccination Analytics dashboard to view and analyze vaccination data using visualizations.
Test Analytics Tile	Access the Test Analytics dashboard to view and analyze medical test data using visualizations.

Related Topics

- [Viewing Incident Insights](#)
PeopleSoft Incident Analytics dashboard provides administrators the ability to view and analyze Health and Safety incident data using PeopleSoft Insights visualizations.
- [Viewing Vaccination Insights](#)
PeopleSoft Vaccination Analytics dashboard provides administrators the ability to view and analyze Health and Safety vaccination data using PeopleSoft Insights visualizations.
- [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.
- [Approving Incidents Using Fluid Approvals](#)
This topic describes how to approve incidents using Fluid Approvals.
- [Approving Vaccinations Using Fluid Approvals](#)
This topic describes how to approve vaccinations using Fluid Approvals.
- [Approving Test Results Using Fluid Approvals](#)
This topic describes how to approve 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

Component or Page Name	Definition Name	Usage
Incident and Health Data Tile	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. See Entering Health and Safety Incident Details .
Vehicles/Equipment Involved Page	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. See Entering Injury Details .
Open Claim (component)	HS_CLAIM_MGMT1 (definition name of the first component page)	Enter and manage claims. See Managing Claims .

Component or Page Name	Definition Name	Usage
Create Employee Rehab Plan (component)	HS_INJ_REHAB1 (definition name of the first component page)	Track rehabilitation plans for employees. See Tracking Rehabilitation Plans .
Create Non-Employee Rehab Plan (component)	HS_INJ_REHAB1 (definition name of the first component page)	Track rehabilitation plans for non-employees. See Tracking Rehabilitation Plans .
Corrective/Preventive Actions (component)	HS_INC_ACTION_CRCT (definition name of the first component page)	Enter corrective and preventive actions. See Tracking Consequent Actions of Incidents .
Review Employee Injury Summary Page	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. See Entering Health and Safety Incident Details .
Injury Details BRA (component)	HS_INJ_NOTIFY (definition name of the first component page)	See Entering Injury Details .
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. See Tracking Incident, Injury, and Illness Data by Individual .
Vehicles/Equipment Involv MEX Page	HS_INC_VEHICLE_MEX	Enter the specifics of incidents involving vehicles or equipment.
Additional Employee Details Page	HS_PERS_DATA	Enter extra address information for employees who are involved in health and safety incidents.
Employment Page	HS_EMPLOYMENT	Enter additional employment details for employees in Canadian and United Kingdom operations who are involved in health and safety incidents.
Family Information Page	HS_FAMILY	Enter additional family information for employees or for non-employees who are involved in a health and safety incident.
Non-Employee (component)	HS_NON_EMPL1 (definition name of the first component page)	Maintain name information for non-employees involved in incidents. See Entering Non-Employee Data .

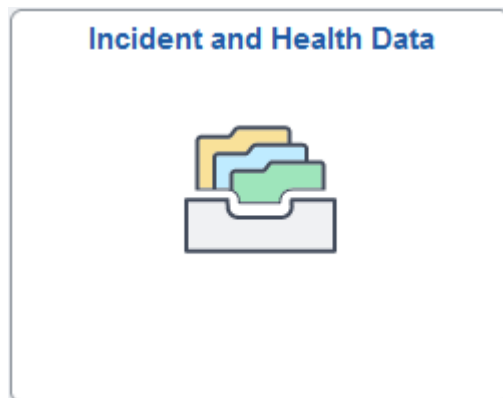
Component or Page Name	Definition Name	Usage
Employee Health Card (component)	GVT_HEALTH_CARD_1 (definition name of the first component page)	Record the employee's physician contact information. See Maintaining and Reviewing Employee Health Card Information .
Health Card Page	HS_HEALTH_CARD	Review and update the employee's health information regarding vaccinations, test results, allergies, medications, and illnesses.
Vaccine Attachments Page	HS_IMMUN_ATTACH_FL	Add, view, or remove attachments for vaccinations.
Test Attachments Page	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. See Tracking Employee Medical Exam Results .
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. See Tracking Employee Medical Exam Results .
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. See Tracking Employee Medical Exam Results .
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. See Tracking Employee Medical Exam Results .
Drug Test (component)	GVT_DRUG_TEST1 (definition name of the first component page)	Set up physician and test information for a drug test. See Tracking Employee Medical Exam Results .
Review Health Card Info (component)	GVT_HEALTH_RVW_1 (definition name of the first component page)	View employee personal data. See Maintaining and Reviewing Employee Health Card Information .
Medical Exam Results BRA Page	MED_EXAM_RSLT_BRA	Review medical exam results.

Component or Page Name	Definition Name	Usage
ASO Exam Results BRA (component)	ASO_EXAM_RSLT_BRA (definition name of the first component page)	Maintain basic ASO exam and physician information. See Tracking Employee Medical Exam Results .
Drug Test BRA Page	EMPL_DRUG_TEST_BRA	Enter worker's drug test information.
Coop Society Data Page	HS_COOP_SOC_GER	Associate an insurer's industrial hazard code with an employee.
Employee Checklist Page	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 Tracking Illnesses for German Employees .
Case Officer Assignment Page	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.

The screenshot shows the 'Incident and Health Data' application interface. On the left is a navigation pane under 'Obtain Incident Information' with a list of components. The main content area is titled 'Incident Details' and includes a search section with dropdowns for 'Incident Number' (beginning with) and 'Incident Type', and buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'.

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**, and then **Health and Safety**, and then **Record Medical Exam Results**, and then **Health Card**, and then **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 Q | < << 1 of 1 >> > | View All

*Regulatory Region USA Q United States + -

Vaccine Details Q | < << 1-3 of 3 >> > | View All

Details | Manufacturer | Location | Documentation | ||>

*Vaccine	Description	*Date	Vaccination Complete	Next Vaccination Due	Declined	Decline Reason		
K010	Influenza	08/19/2021	☒	08/19/2022 Q	☐		+	-
K014 Q	Tetanus	05/03/2021 Q	☒	05/03/2031 Q	☐		+	-
K015 Q	Shingles	07/27/2021 Q	☐		☒	Allergic Reaction Q	+	-

This example illustrates the fields and controls on the Health Card page (2 of 3).

Test Results Q | < << 1 of 1 >> > | View All

*Regulatory Region USA Q United States + -

Test Details Q | < << 1-1 of 1 >> > | View All

Details | Location | Documentation | ||>

*Test	Description	*Date	Test Result	Test Method		
K005 Q	Cholesterol	03/01/2021 Q	Normal Q		+	-

Allergies Q | < << 1 of 1 >> > | View All

*Regulatory Region USA Q United States + -

Allergy Details Q | < << 1-2 of 2 >> > | View All

Details | ||>

*Allergy	Description	*Date	Comments		
K003 Q	Animal Dander	07/27/2021 Q	Dogs and cats only	+	-
K006 Q	Peanuts and Tree Nuts	07/01/2021 Q		+	-

This example illustrates the fields and controls on the Health Card page (3 of 3).

Medications

| < > 1 of 1 > View All

*Regulatory Region United States

+ -

Medication Details

< > 1-1 of 1 > View All

*Medication	Description	*Date	Comments		
				+ -	

Illnesses

| < > 1 of 1 > View All

*Regulatory Region United States

+ -

Illness Details

< > 1-1 of 1 > View All

*Illness	Description	Date	Comments		
				+ -	

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	Specify the vaccine that the employee received and the vaccination date. These are required fields. Do not enter duplicate values. When you select a different vaccine, the system clears any existing vaccination, manufacturer and location information for the old vaccine from the row. Vaccines are defined on the Immunization page (IMMUN_TBL).

Field or Control	Description
Vaccination Complete	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. This check box is selected automatically when the condition applies, or can be updated manually.
Next Vaccination Due	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.
Declined	Select to indicate that the employee declined to take the vaccine. This check box is not editable when the Vaccination Complete check box is selected. When the Declined check box is selected, the system populates the Date field with today's date, makes the Decline Reason field editable, and hides the fields from the Manufacturer and Location tabs.
Decline Reason	Select the reason the employee declined the vaccine. This field become editable when the Declined check box is selected.
Add Attachments or View Attachments	Click to add, view or remove attachments on the Vaccine Attachments Page .

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.

Field or Control	Description
Test and Date	Specify the test that the employee took and the date of the test. These are required fields. Do not enter duplicate values. Tests are defined on the Test page (HS_TEST_TBL).
Attachments	Click to add, view or remove attachments on the Test Attachments Page .

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.

Field or Control	Description
Allergy and Date	Specify the allergy that the employee has and the date you entered this information. These are required fields. Do not enter duplicate values. Allergies are defined on the Allergy page (ALLERGY_TBL).

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

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	

1 row

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.
	Select to remove the attachment uploaded by you.
(Delete)	

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

Test Attachments

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.
	Select to remove the attachment uploaded by you.
(Delete)	

Related Topics

- [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.

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.

PeopleSoft Human Resources Monitor Health and Safety
G49591-01
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May 8, 2026
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Pages Used to Run Health and Safety Reports as Administrators Using Fluid

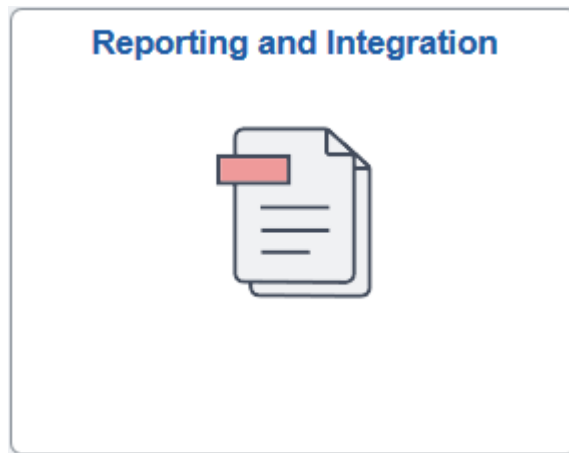
Component or Page Name	Definition Name	Usage
Reporting and Integration Tile	HC_HS_REPORTING_FL_GBL	Access a collection of administrative components for Health and Safety reporting. Important: The majority of the Health and Safety reports are documented in Application Fundamentals: Monitor Health and Safety Reports. Reports that are not included in that Health and Safety reports topic are listed in this table.
PeopleSoft Human Resources Administer Workforce: Print Delta XML File ESP Page	XML_RC_ESP	Generate XML files to send to insurance companies.
Extract WCB Injury Data CAN Page	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	Prepare accident and incident data, and load it to temporary data table. See Application Fundamentals: Monitor Health and Safety Reports.
Illness Data DEU Page	RUNCTL_OHS504GR	Prepare illness data, and load it to temporary data table. See Application Fundamentals: Monitor Health and Safety Reports.
Mixed Committee MEX Page	MIX_COM_TBL_MEX	Identify details for Mexican mixed committees.
RIDDOR Data Page	RUNCTL_OHS_UK	Collect RIDDOR data for GBR Health and Safety reporting. See (GBR) Collecting RIDDOR Data for UK reports .
Submit Injury Report Page	INIT_BC_WCB_WEB	Create and transmit injury reports.
Review Submission Status Page	WCB_INC_SUB_STAT	Request submission status. See Processing Data for WorkSafeBC's Web Service .
Review Error Messages Page	WCB_INJ_ERR_RESP	Review error messages received from the WCB. See Processing Data for WorkSafeBC's Web Service .

Component or Page Name	Definition Name	Usage
Review Success Messages Page	WCB_INJ_RPT_RESP	Review success messages received from the WCB. See Processing Data for WorkSafeBC's Web Service .
Request Submission Status Page	WCB_SUB_STAT	Review the submission status of an injury report. See Processing Data for WorkSafeBC's Web Service .
OSHA 301 Incident Report Page	OSHA_301_SELECT	Create OSHA-301 incident reports. See PeopleSoft Human Resources Meet Regulatory Requirements: Running the U.S. Regulatory Reports.
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. See Application Fundamentals: Monitor Health and Safety Reports.
OSHA 300 Incident Log Page	RUN_CNTL_OSHA_INT1	Generate the OSHA 300 log. See Application Fundamentals: Monitor Health and Safety Reports.
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. See Application Fundamentals: Monitor Health and Safety Reports.
OSHA-200 Log	RUNCTL_CALEDARYR	Lists the case numbers and details of each injury and illness that occurred during a particular calendar year. See Application Fundamentals: Monitor Health and Safety Reports.
Employee Work Restriction Smry Page	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.

 A screenshot of the "Reporting and Integration" application start page. The page has a dark blue header with the title "Reporting and Integration" and navigation icons. On the left, a sidebar lists categories: "Incident Reports" (expanded), "Claim Summary Overview" (selected), "Employee Health Incidents", "Health Incident Claim Report", "Health Incident Lost Work", "Health Incident Summary Data", "Personnel Location Incident", "Non-Employees Health Incidents", "Vehicle Incident Summary", and "WCB Form 7 CAN". The main content area is titled "Claim Summary Overview" and includes a search bar with "Find an Existing Value" and "Add a New Value" buttons. Below the search bar, there are "Search Criteria" with a dropdown for "Run Control ID" set to "begins with" and a "Case Sensitive" checkbox. At the bottom, there are "Search", "Clear", "Basic Search", and "Save Search Criteria" buttons.

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 Topics

- [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.

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

Component or Page Name	Definition Name	Usage
Configure Health and Safety Tile	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. See Defining Injuries and Illnesses .
Body Parts Page	BODY_PART_TABLE	Identify body parts that are subject to injury and associate each with a class. See Defining Injuries and Illnesses .
Nature of Injury Page	INJURY_NATURE_TBL	Identify types of physical injuries. See Defining Injuries and Illnesses .
Source of Injury Page	INJURY_SOURCE_TBL	Identify potential sources or causes of injury. See Defining Injuries and Illnesses .
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. See Defining Injuries and Illnesses .
Animal Table Page or Animals Involved Page	HS_ANIMAL_TBL	Identify the types of animals involved in incidents.
Transport Table Page or Transportation Page	HS_TRANSPORT_TBL	Identify the modes of transportation used by employees during incidents that occur during work-related travel.

Component or Page Name	Definition Name	Usage
Class/Subclass Table - CAN Page or Class/Subclass CAN Page	HS_CLASS_CAN	Identify the standard industry classes and subclasses for Canadian business locations, based upon the classifications designated by the WCB.
Occupation Table - CAN Page or Occupations CAN Page	HS_OCCUPATION_CAN	Set up the standard occupational classifications used by the WCB.
Contributing Factors - CAN Page or Contributing Factors CAN Page	HS_CONTFAC_CAN	Define the types of casual factors associated with a health and safety incident.
Prevent. Actions Table - CAN Page or Preventative Actions CAN Page	HS_PREVENT_ACT_CAN	Identify the types of actions taken to prevent future occurrences of incidents and accidents.
Case Officer Table DEU Page or Case Officer DEU Page	HS_LOC_CASEOFF_GER	Identify the officials for various areas of industrial health and safety within the organization.
Correct. Actions Table DEU Page or Corrective Actions DEU Page	HS_CORRECT_ACT_GER	Define corrective actions that you have implemented and associate the corrective action with a corrective action category.
Disease Class Table DEU Page or Disease Class DEU Page	HS_DIS_CLASS_GER	Define disease classes and associate them with a disease type.
Prevent. Actions Table - DEU Page or Preventative Actions DEU Page	HS_PREVENT_ACT_GER	Define the actions that you have implemented to prevent workplace incidents or accidents.
Unsafe Item Table DEU Page or Unsafe Items DEU Page	HS_UNSAFE_ITEM_GER	Define unsafe items and associate them with an unsafe item class.
Work Area Class Table DEU Page or Work Area Class DEU Page	HS_WA_CLS_TBL_GER	Set up work area classes as defined by the employer's liability insurance association.
Work Area Category Table DEU Page or Work Area Category DEU Page	HS_WA_CTG_TBL_GER	Set up work area categories as defined by the employer's liability insurance association.
Work Area Table DEU Page or Work Area DEU Page	HS_WA_TBL_GER	Set up work areas as defined by the employer's liability insurance association.
External Scheme GBR Page	HS_EXT_SCHEME_UK	Maintain an External Scheme.
Dangerous Occurrences Table Page or Dangerous Occurrences Page	HS_DANGER_OCC	Define types of dangerous occurrences or specify those that are defined by the regulatory authority in the regulatory region.
Job Code Hazards Table Page or Job Code Hazards Page	JOBCODE_HAZRDS_TBL	Track exposure to hazards experienced by employees in a particular job code.

Component or Page Name	Definition Name	Usage
Location Hazards Table Page or Location Hazards Page	LOCATN_HAZRDS_TBL	Identify exposures to hazards that have occurred at specific locations in the organization.
Hazardous Materials Data Page or Hazardous Condition/Materials Page	HAZ_CON_MATRL_TBL	Define codes for physical conditions and hazardous materials that might directly contribute to occupational accidents, injuries, or illnesses.
Hazard Units BRA Page	HAZ_UNITS_BRA	Define hazard units.
Hazard Concepts BRA Page	HAZ_CONCEPT_BRA	Define hazard concepts.
Work Hazards BRA (component)	HAZARD_TBL_BRA (definition name of the first component page)	Define codes for occupational accidents, injuries, or illnesses. See Defining Dangerous Occurrences and Hazardous Conditions .
Job Code Hazards BRA (component)	JOBCODE_HAZRDS_TBL (definition name of the first component page)	Track exposure to hazards experienced by employees in a particular job code. See Defining Dangerous Occurrences and Hazardous Conditions .
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. See (BRA) Defining Work Environments and Conditions .
Workplace Table BRA Page	WORKPLACE_BRA	Define work environments.
Medical Facilities Page	HS_MEDICAL_FAC	Enter hospitals and clinics and their addresses. See Defining Medical Services Information .
Physicians	HS_PHYSICIAN_DATA1	Enter name and address information of physicians. See Defining Medical Services Information .
Diagnosis Table Page or Diagnosis Page or Diagnosis for Regulations Page	DIAGNOSIS_TABLE	Define standard medical diagnoses for injuries and illnesses.
Occupational Illnesses Table Page or Occupational Illnesses Page	HS_OCC_ILLNESS	Enter standard types of occupational illnesses.
Claim Threshold - Claims AUS Page	CLAIM_INFO_AUS	Establish claims threshold information.

Component or Page Name	Definition Name	Usage
Claim Threshold - Claims AUS Page (For State AUS)	CLAIM_INFO_AUS	Establish claims threshold information by state.
Claim Threshold - Claims AUS Page (For Union AUS)	CLAIM_INFO_AUS	Establish claims threshold information by state.
Medicare Item Details AUS Page	MEDICARE_TBL_AUS	Define Medicare items. See Defining Injuries and Illnesses .
Allergy Page	ALLERGY_TBL	Define allergy types. See Defining Injuries and Illnesses .
Immunization (component)	IMMUN_TBL (definition name of the first component page)	Define immunization types. See Immunization Page and Immunization - Self-Service Page .
Test (component)	HS_TEST_TBL (definition name of the first component page)	Define test types. See Test Page and Test - Self-Service Page .
Medication Page	MEDCATN_TBL	Define medication types. See Defining Injuries and Illnesses .
Codes and Effective Dates Page	WORK_RESTRICT_TBL	Identify physical limitations or restrictions placed on individuals as a result of injuries or illnesses. See Defining Work Restrictions and Modified Work Duties .
Modified Work Page	MODIFIED_WORK_TBL	Identify changes and modifications to processes or methods of doing a job. See Defining Work Restrictions and Modified Work Duties .
Configure Incident Types Page	HS_SS_INCDT_CFG	Configure system settings for reporting incidents in Fluid Self Service.
Employer-Related Codes Page	WCB_EMPLR_REL_CD	Request employer codes.
System Codes Page	WCB_SYSTEM_CD	Request system codes.
Register Employer Web Service Page	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 shows "Manage Health and Safety" and "Configure Health and Safety". A sidebar on the left lists categories: "Define Accident/Injury Info" (expanded), "Body Parts", "Nature of Injury", "Source of Injury", "Unsafe Acts", "Animals Involved", "Transportation", "Class/Subclass CAN", "Occupations CAN", and "Contributing Factors CAN". The main content area is titled "Accident Types" and includes 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 dropdown menus for "Set ID", "Accident Type", and "Description", each with a "begins with" label and a search icon. There are also checkboxes for "Include History", "Correct History", and "Case Sensitive". At the bottom of the search section are buttons for "Search", "Clear", "Basic Search", and "Save Search Criteria". A footer at the very bottom of the main area contains links for "Find an Existing Value" and "Add a New Value".

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**, and then **Product Related**, and then **Workforce Monitoring**, and then **Health and Safety**, and then **Immunization**, and then **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 in the Oracle HCM Cloud interface. At the top, there are tabs for 'Immunization' and 'Self-Service'. Below the tabs, the 'Set ID' is 'USA' and the 'Immunization Code' is 'K016'. The main section is titled 'Immunization Details' and includes a search bar and a 'View All' link. The form contains the following fields and controls:

- *Effective Date:** A date picker set to 01/01/1900.
- *Status:** A dropdown menu set to 'Active'.
- *Description:** A text field containing 'COVID-19'.
- Short Description:** A text field containing 'COVID-19'.
- Vaccine Details:** A section containing a 'Schedule' field set to '12' and a unit dropdown set to 'Months'.
- Manufacturer Details:** A table with two rows:

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.

Field or Control	Description
Schedule	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. The system uses this information to calculate the due date for the next vaccination (single-dose) or vaccination series (multi-dose) on the Vaccine Details Page.

Field or Control	Description
Manufacturer	Select the manufacturer of the vaccine. If the vaccine has multiple manufacturers, insert more rows and enter the information. Manufacturers are defined on the Manufacturers page (HS_MANUFACT_TBL).
Authorization	Specify the authorization status of the vaccine by the manufacturer. Values are: <i>Approved for Use</i> <i>Emergency Use</i> <i>Not Authorized</i> This value is informational only and is not used in any processing.
Series	Specify the number of doses included in the vaccine.

Related Topics

- [Reporting Vaccinations as Employees](#)
This topic discusses how employees add and update their vaccination information through Fluid Self-Service.

Immunization - Self-Service Page

Use the Immunization - Self-Service page (IMMUN_SS_TBL) to configure self-service settings for vaccines.

Navigation:

- **Set Up HCM**, and then **Product Related**, and then **Workforce Monitoring**, and then **Health and Safety**, and then **Immunization**, and then **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
Self-Service

Set ID USA
Immunization Code K016

Immunization Details

1 of 1
View All

Effective Date 01/01/1900
Status Active

Description Covid-19
Short Description COVID-19

Self-Service Configuration

☒ Available in Self Service
☒ Display Manufacturer Details
☒ Display Next Due Date

Attachments

☒ Enable Attachments
☒ Require Attachment Upload

Acknowledgements

☒ Enable Acknowledgements

Category HANDS Health and Safety Category
ID HS2 Health and Safety Self Service

Approvals

☒ Enable Approvals Workflow

Process ID HSImmunization Vaccination Approval
Definition ID byAdministrator Health and Safety Vaccinations

Self-Service Configuration

Field or Control	Description
Available in Self Service	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.
Display Manufacturer Details	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 Immunization Page .
Display Next Due Date	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 Immunization Page .

Attachments

Field or Control	Description
Enable Attachments	Select to allow attachments to be inserted when employees add entries for this vaccine.
Require Attachment Upload	Select to require attachments (for example, vaccination record copy) to be inserted when employees add entries for this vaccine.

Acknowledgements

Field or Control	Description
Enable Acknowledgements	Select to require employees to provide acknowledgement when they add or update entries for this vaccine.
Category and ID	Enter the category and ID of the configuration to be used for the Acknowledgment section that appears on the details page.

Approvals

Field or Control	Description
Enable Approvals Workflow	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. Clear this check box if approval is not needed. When approval is not enabled, no push notifications or email notifications will be sent.
Process ID and Definition ID	Specify the process and definition IDs to be used for the approval process. These fields are required if the Enable Approvals Workflow check box is selected. The system delivers the <i>HSImmunization</i> process ID and <i>byAdministrator</i> definition ID for use in vaccination approval. Note: If the Enable Approvals Workflow check box is selected, AWE sends email and push notifications based on the setup of the process ID.

Related Topics

- [Reporting Vaccinations as Employees](#)
This topic discusses how employees add and update their vaccination information through Fluid Self-Service.

Test Page

Use the Test page (HS_TEST_TBL) to define tests.

Navigation:

- **Set Up HCM**, and then **Product Related**, and then **Workforce Monitoring**, and then **Health and Safety**, and then **Test**, and then **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.

Test

Self-Service

Set ID

USA

Test Code

K004

Test Details

1 of 1

View All

*Effective Date

07/19/2021

*Status

Active

+

-

*Description

Covid-19 Antibody

Short Description

COVID-19

Test Type

Antibody

Test Results

1-2 of 2

Result		
Normal	+	-
Abnormal	+	-

Test Methods

1-1 of 1

Method		
CT Scan	+	-

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.

Field or Control	Description
Test Type	Select the type of the test. Values are: <i>Antibody</i> <i>Biopsy</i> <i>Diagnostic</i> <i>Genetic</i> <i>Imaging</i> <i>Screening</i> This value is informational only and is not used in any processing.

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 Topics

- [Reporting Test Results as Employees](#)
This topic discusses how employees add and update their test results through Fluid Self-Service.

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**, and then **Product Related**, and then **Workforce Monitoring**, and then **Health and Safety**, and then **Test**, and then **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.

Test

Self-Service

Set ID USA
Test Code K004

Test Details

Effective Date 07/19/2021

Status Active

Description Covid-19 Antibody

Short Description COVID-19

Self-Service Configuration

☒ Available in Self Service

Attachments

☒ Enable Attachments
☒ Require Attachment Upload

Acknowledgements

☒ Enable Acknowledgements

Category HANDS Health and Safety Category

ID HS2 Health and Safety Self Service

Approvals

☒ Enable Approvals Workflow

Process ID HSTest Test Approval

Definition ID byAdministrator Health and Safety Tests

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](#).

Field or Control	Description
Available in Self Service	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 Topics

- [Reporting Test Results as Employees](#)
This topic discusses how employees add and update their test results through Fluid Self-Service.

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

 | < > 1 of 1 > View All

*Effective Date

*Status

☒ Available in Self Service

Approvals and Notifications

☒ Enable Approvals Workflow

Process ID

Incident Report Approval

Definition ID

Health and Safety Incident

☐ Notify Employee
☐ Notify Administrator

Activity Guide

Activity Guide Category

*Template

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.

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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

Field or Control	Description
Enable Approvals Workflow	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. The administrator either approves or pushes back (if more information is needed) the submitted incident on the Pending Approvals - Incident Report Page. 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.
Process ID and Definition ID	Specify the process and definition IDs to be used for the approval process. These fields are required if the Enable Approvals Workflow check box is selected. The system delivers the <i>HSIncidentReport</i> process ID and <i>byAdministrator</i> definition ID for use in incident approval. Note: If the Enable Approvals Workflow 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 Notify Employee and Notify Administrator check boxes.

Field or Control	Description
Notify Employee and Employee Notification Events	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 Enable Approvals Workflow check box is <i>not</i> selected. If the Enable Approvals Workflow 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. When selected, use the Employee Notification Events link that appears to specify the notification ID that is used to trigger notifications for employees. The default notification ID is <i>HealthSafetyIncidents</i>. See Also Enterprise Components: Understanding Notification Composer.
Notify Administrator and Administrator Notification Events	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 Enable Approvals Workflow check box is <i>not</i> selected. If the Enable Approvals Workflow 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. When selected, use the Administrator Notification Events link that appears to specify the notification ID that is used to trigger notifications for administrators. The default notification ID is <i>HealthSafetyIncidentsAdmin</i>. See Also Enterprise Components: Understanding Notification Composer.

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 Topics

- [Reporting Incidents as Employees](#)
This topic discusses how to report health and safety incidents as employees.
- [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.

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:

- Application Fundamentals: Understanding PeopleSoft Insights
- *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

Page Name	Definition Name	Usage
Incident Analytics Tile	HC_HS_ANALYTICS_FL (this is the cref for the tile)	Access the Incident Analytics dashboard.
Incident Analytics Dashboard	HC_HS_ANALYTICS_FL	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**, and then **Search Framework**, and then **Search Admin Activity Guide**, and then **Administration**, and then **Deploy/Delete Object**)
2. Build the *HC_HS_INCIDENT_DATA* search index.
(**PeopleTools**, and then **Search Framework**, and then **Search Admin Activity Guide**, and then **Administration**, and then **Schedule Search Index**)
3. Deploy the *Incident Analytics Tile* and *Incident Analytics* dashboard.

(**PeopleTools**, and then **Search Framework**, and then **Administration**, and then **Deploy Insights Dashboards**)

 Note

The full index must be run before the dashboard can be deployed.

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 Topics

- Application Fundamentals: Understanding PeopleSoft Insights Using PeopleSoft Search Framework
- Application Fundamentals: Understanding Real Time Indexing in HCM

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.
Search field	Enter a query to filter data, if applicable.

Term	Definition
 (Change all filters), and + Add filter	Enter criteria to filter data on the visualizations. You can apply filters in a number of ways: • Enter queries in the Search field. • Use the + Add filter link to create filters using fields, operators and field values. • Use delivered filter fields. • Select a chart item from a visualization. • Use the filter options in the Incident Details grid to add or exclude items. • Use the legend to add or exclude items. Added filters are displayed next to the + Add filter 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. Click the Change all filters 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.
 (Calendar) or Show dates	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. If you have selected a commonly used date range, for example, <i>This month</i>, or <i>Week to date</i>, click the Show dates 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> —> <i>now</i>, which indicates that the selected date range started from approximately 10 months ago and ends on the current date.
Regulatory Region, Location, and Establishment	Select to filter incident data by regulatory region, followed by location, then by establishment. You must select a regulatory region before selecting a location. A location must be specified before you can filter data by establishment.

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.

Term	Definition
 (Options)	Pause over the Options icon to select one of these options: <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. <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.
 (Toggle legend)	Click this icon to hide or display the legend for the chart, if available. You can click an item in the legend to change its color, or add it as a filter (if applicable).
Chart item (bar, pie slice, and so forth)	Pause over a chart item, such as a bar item or pie slice, to view a summary of details for that item. Select a chart item to add a filter for it to apply to all visualizations.

Incident Analytics Tile

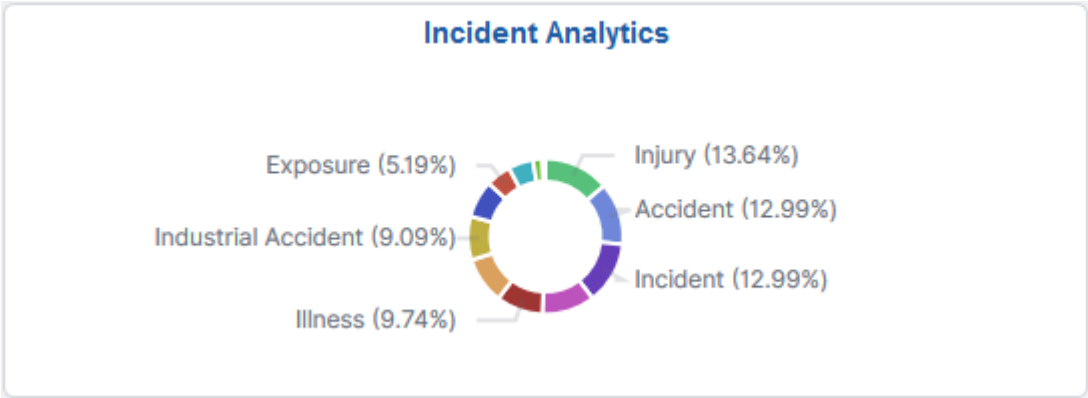
Use the Incident Analytics tile to access the Incident Analytics dashboard.

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.

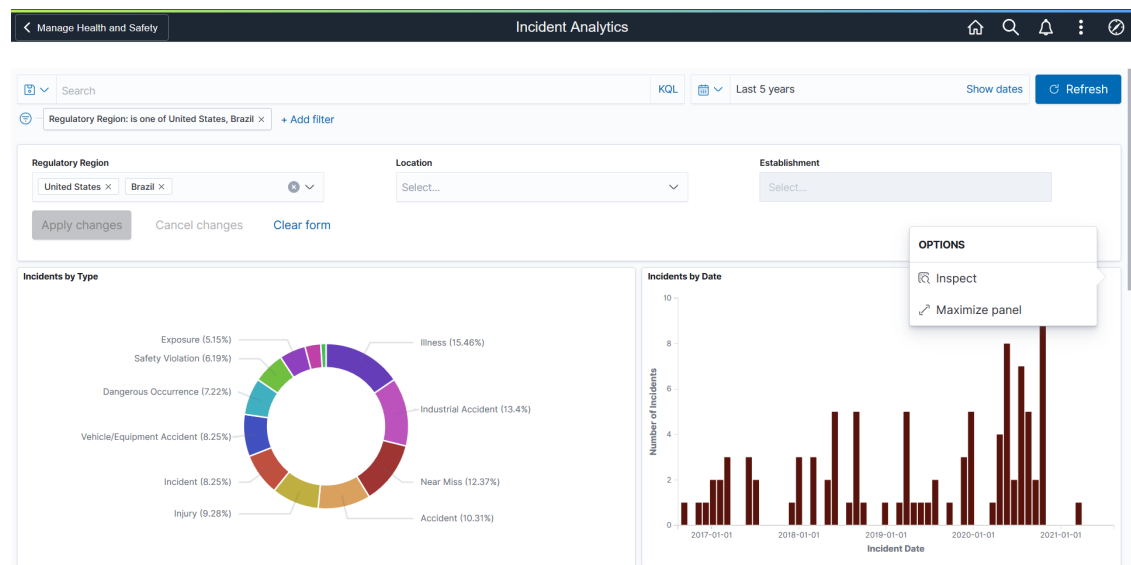
Incident Analytics Dashboard

Use the Incident Analytics dashboard to review and analyze incident data using visualizations.

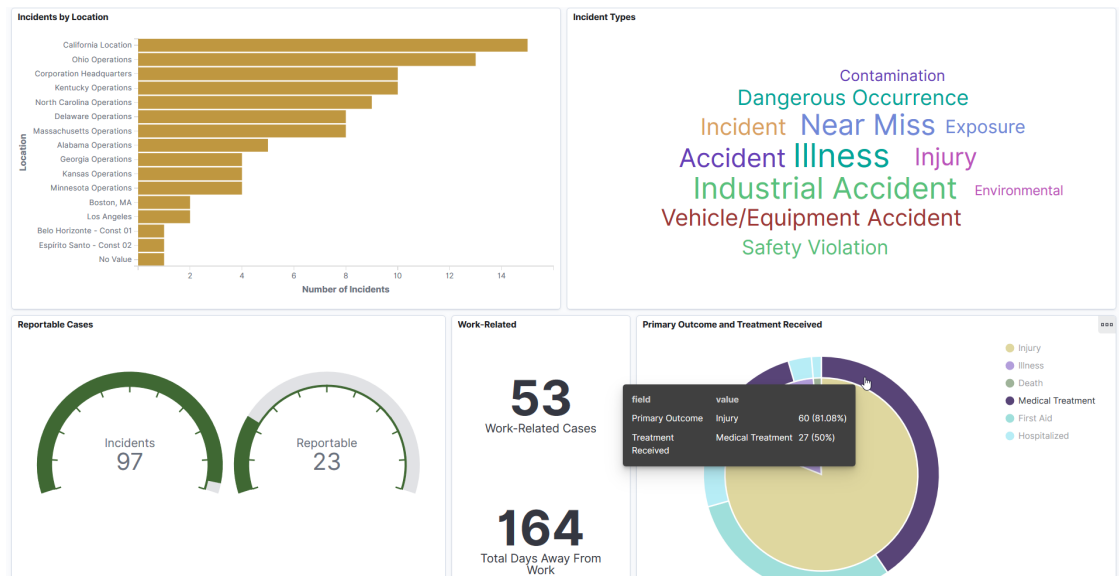
Navigation:

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 Number	Incident Type	Incident Date	Location Name	Employee Name	Primary Outcome	Occupational Illness	Treatment Received	Reportable Case	Manage Incident	Incidents
70000035	Incident	Mar 15, 2018	Ohio Operations	Derek Holsinger	Injury		Medical Treatment	Not Reportable	Detail	1
70000035	Incident	Mar 15, 2018	Ohio Operations	Kirby Torres	Injury		First Aid	Not Reportable	Detail	1
70000069	Exposure	Jul 21, 2019	North Carolina Operations	Corrine Tran	Injury		Medical Treatment	Not Reportable	Detail	1
70000069	Exposure	Jul 21, 2019	North Carolina Operations	Justin Galang	Injury		Medical Treatment	Reportable	Detail	1
70000086	Vehicle/Equipment Accident	May 2, 2018	Massachusetts Operations	Neil Alvarez	Injury		None	Not Reportable	Detail	1
70000086	Vehicle/Equipment Accident	May 2, 2018	Massachusetts Operations	Seek Burkman	Injury		Hospitalized	Reportable	Detail	1
70000092	Vehicle/Equipment Accident	Apr 10, 2020	Kentucky Operations	Bill Murkami	Injury		Hospitalized	Not Reportable	Detail	1
70000092	Vehicle/Equipment Accident	Apr 10, 2020	Kentucky Operations	Scott Tipman	Injury		Hospitalized	Not Reportable	Detail	1
70000094	Incident	Nov 13, 2019	Corporation Headquarters	Justin Galang	Injury		First Aid	Not Reportable	Detail	1
70000094	Incident	Nov 13, 2019	Corporation Headquarters	Scott Tipman	Injury		First Aid	Not Reportable	Detail	1

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.

Visualization	Description
Incidents by Type	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).
Incidents by Date	This vertical bar chart visualization displays the number of incidents by incident date.
Incidents by Location	This horizontal bar chart visualization displays the number of incidents by location.
Incident Types	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 to that incident type.
Reportable Cases	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. 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 Injury Details - Reporting Page. If more than one employee is involved in an incident, the Incident Details 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 Reportable Case 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.
Work-Related	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. Incident injuries or illnesses are set as work-related by selecting the Work-Related option on the Injury Details - Work-Related Page.

Visualization	Description
Primary Outcome and Treatment Received	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.

Field or Control	Description
 (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)	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. Click the Filter for value (+ 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. Click the Filter out value (- 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 Incident Type column, visualizations will refresh to show incidents for any type except <i>Exposure</i>. Filters can be removed from the Filters area at the top of the page.
Detail	Click to access the corresponding incident in a new browser window or tab. See Entering Health and Safety Incident Details. Note: 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. See the Real Time Index for Incident Analytics Visualizations section in this topic for the index that is RTI-enabled for the Incident dashboard.

Field or Control	Description
Raw or Formatted	Click to export data from the grid into a .csv file format.

Related Topics

- [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.

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:

- Application Fundamentals: Understanding PeopleSoft Insights
- *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

Page Name	Definition Name	Usage
Vaccination Analytics Tile	HC_HS_VACC_ANALYTICS_FL (this is the cref for the tile)	Access the Vaccination Analytics dashboard.
Vaccination Analytics Dashboard	HC_HS_VACC_ANALYTICS_FL	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**, and then **Search Framework**, and then **Search Admin Activity Guide**, and then **Administration**, and then **Deploy/Delete Object**)
2. Build the *HC_HS_EMPL_VACC_DATA* search index.
(**PeopleTools**, and then **Search Framework**, and then **Search Admin Activity Guide**, and then **Administration**, and then **Schedule Search Index**)
3. Deploy the *Vaccination Analytics Tile* and *Vaccination Analytics* dashboard.
(**PeopleTools**, and then **Search Framework**, and then **Administration**, and then **Deploy Insights Dashboards**)

Note

The full index must be run before the dashboard can be deployed.

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 Topics

- Application Fundamentals: Understanding PeopleSoft Insights Using PeopleSoft Search Framework
- Application Fundamentals: Understanding Real Time Indexing in HCM

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.
Search field	Enter a query to filter data, if applicable.
 (Change all filters), and + Add filter	Enter criteria to filter data on the visualizations. You can apply filters in a number of ways: • Enter queries in the Search field. • Use the + Add filter link to create filters using fields, operators and field values. • Use delivered filter fields. • Select a chart item from a visualization. • Use the filter options in the Vaccination Details grid to add or exclude items. • Use the legend to add or exclude items. Added filters are displayed next to the + Add filter 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. Click the Change all filters 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.

Term	Definition
 (Calendar) or Show dates	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. If you have selected a commonly used date range, for example, <i>This month</i>, or <i>Week to date</i>, click the Show dates 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> → <i>now</i>, which indicates that the selected date range started from approximately 10 months ago and ends on the current date.
Organizational Relationship, Regulatory Region, Business Unit, Department, Work Location, Job Family, Vaccine, and Vaccination Location	Select to filter vaccination data using these delivered filter fields. Selections in the Regulatory Region field control the values that are available in the Business Unit, Department, Work Location, Job Family, and Vaccine fields respectively.

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.

Term	Definition
 (Options)	Click the Options icon to select one of these options: <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. <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.
 (Toggle legend)	Click this icon to hide or display the legend for the chart, if available. You can click an item in the legend to change its color, or add it as a filter (if applicable).
Chart item (bar, pie slice, and so forth)	Pause over a chart item, such as a bar item or pie slice, to view a summary of details for that item. Select a chart item to add a filter for it to apply to all visualizations.

Vaccination Analytics Tile

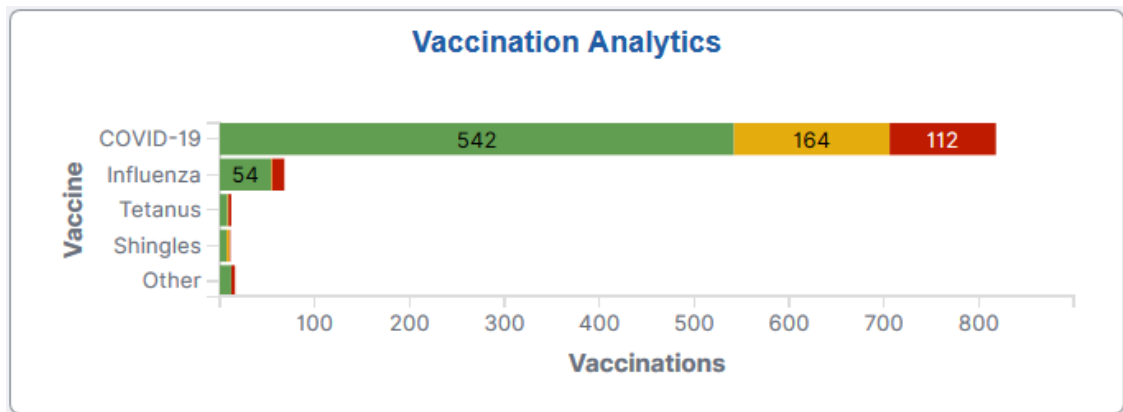
Use the Vaccination Analytics tile to access the Vaccination Analytics dashboard.

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.

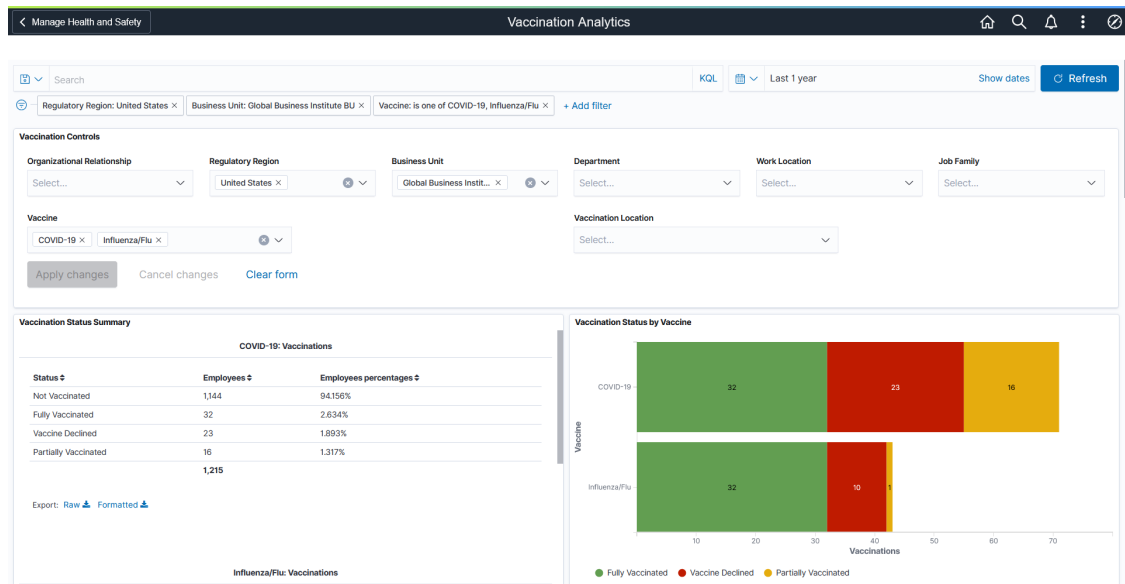
Vaccination Analytics Dashboard

Use the Vaccination Analytics dashboard to review and analyze vaccination data using visualizations.

Navigation:

Select the **Vaccination Analytics** tile.

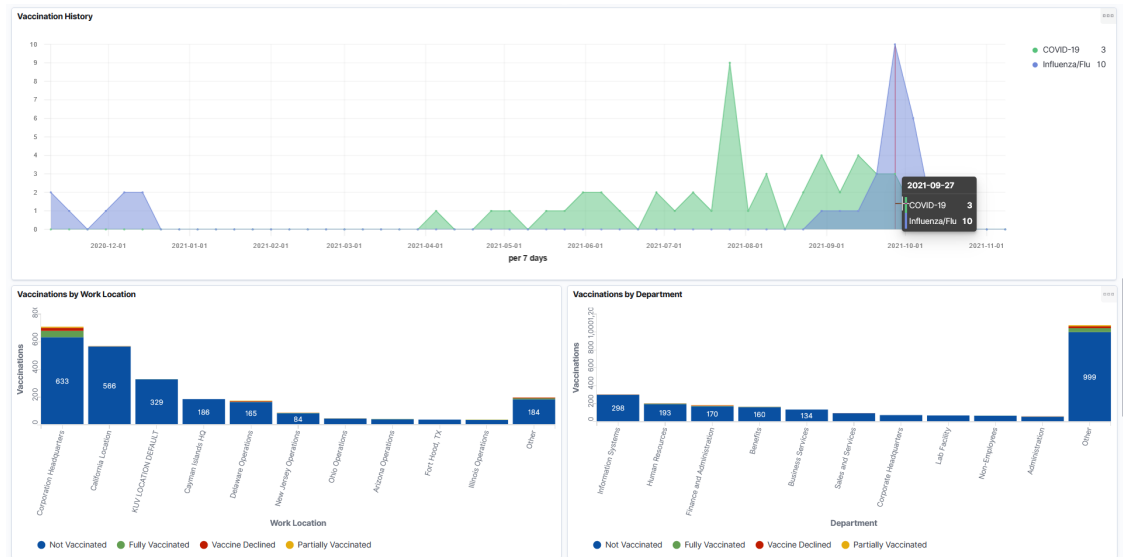
This example illustrates the Vaccination Analytics dashboard (1 of 4).



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	Go to Health Card	KUJ130
Abagail Smith	61	Employee	Kansas Operations	Influenza/Flu	Oct 9, 2021	Other	Fully Vaccinated	Go to Health Card	KUJ130
Adland Chu	51	Employee	Corporation Headquarters	COVID-19	Aug 31, 2021		Vaccine Declined	Go to Health Card	KUJ065
Alan Carr	60	Employee	Illinois Operations	COVID-19	Apr 27, 2021		Fully Vaccinated	Go to Health Card	KUJ150
Alex Passantino	54	Employee	Corporation Headquarters	COVID-19	May 24, 2021	Other	Fully Vaccinated	Go to Health Card	KUJ067
Allan Martin	60	Employee	Oklahoma	COVID-19	Sep 21, 2021		Vaccine Declined	Go to Health Card	KUJ012
Allan Martin	60	Employee	Oklahoma	Influenza/Flu	Sep 21, 2021		Vaccine Declined	Go to Health Card	KUJ012
Annie Mirzoyan	64	Employee	Delaware Operations	COVID-19	Sep 19, 2021		Vaccine Declined	Go to Health Card	KUJ077
Anson Thorp	67	Employee	Illinois Operations	COVID-19	Jul 31, 2021		Partially Vaccinated	Go to Health Card	KUJ088
Benny Wong	80	Employee	California Location	COVID-19	Sep 29, 2021		Vaccine Declined	Go to Health Card	KUJ064
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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	Go to Health Card	KUHM23
1LT Ulysses Franklin	77	Employee	Fort Hood, TX	A Co 1/15 Infantry Bn	Infantry Platoon Leader	Influenza/Flu	Not Vaccinated	Go to Health Card	KUHM23
1LT Xavier Cowell	72	Employee	Fort Hood, TX	A Co 1/15 Infantry Bn	Platoon Leader	COVID-19	Not Vaccinated	Go to Health Card	KUHM16
1LT Xavier Cowell	72	Employee	Fort Hood, TX	A Co 1/15 Infantry Bn	Platoon Leader	Influenza/Flu	Not Vaccinated	Go to Health Card	KUHM16
1SG Russell Irvin	61	Employee	Fort Benning, GA	1/15 Infantry Battalion	Infantry Company First Sergeant	COVID-19	Not Vaccinated	Go to Health Card	KUHM21
1SG Russell Irvin	61	Employee	Fort Benning, GA	1/15 Infantry Battalion	Infantry Company First Sergeant	Influenza/Flu	Not Vaccinated	Go to Health Card	KUHM21
1SG William Davidson	54	Employee	Fort Hood, TX	A Co 1/15 Infantry Bn	Infantry Company 1st Sergeant	COVID-19	Not Vaccinated	Go to Health Card	KUHM17
1SG William Davidson	54	Employee	Fort Hood, TX	A Co 1/15 Infantry Bn	Infantry Company 1st Sergeant	Influenza/Flu	Not Vaccinated	Go to Health Card	KUHM17
APOLLO DACHSHUND	48	Employee	Corporation Headquarters	President	Chief Finance Officer	COVID-19	Not Vaccinated	Go to Health Card	KUTL100
APOLLO DACHSHUND	48	Employee	Corporation Headquarters	President	Chief Finance Officer	Influenza/Flu	Not Vaccinated	Go to Health Card	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).

Visualization	Description
Vaccination Status Summary	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): • <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. • <i>Fully Vaccinated</i>: Displays the number (and percentage of the total) of completed, full vaccinations for the specified vaccine. • <i>Partially Vaccinated</i>: Displays the number (and percentage of the total) of in-progress vaccination series for the specified vaccine. • <i>Vaccine Declined</i>: Displays the number (and percentage of the total) of declination for the specified vaccine. Scroll down to view the information for all vaccines included in the dashboard.
Vaccination Status by Vaccine	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>).
Vaccination Locations	This stacked horizontal bar chart visualization displays the numbers of vaccinations by vaccination site (<i>Workplace</i> and <i>Other</i>) and location.
Vaccines Declined by Reason	This pie chart visualization displays the percentages of employee-declined vaccines by reason.
Vaccination Status by Age Groups	This horizontal bar chart visualization displays the distribution of vaccinations by age group and status.
Vaccination Status by Current Sex	This horizontal bar chart visualization displays the numbers of vaccinations by current sex and status.
Vaccination History	This area panel displays vaccination trends by vaccine during the specified time period. Pause over the X-axis to view the numbers of vaccinations by vaccine on a given date on the popup menu that appears. 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.
Vaccinations by Work Location	This stacked vertical bar chart visualization displays the numbers of vaccinations by work location and status.
Vaccinations by Department	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.

Field or Control	Description
 (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)	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. Click the Filter for value (+ 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. Click the Filter out value (- 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. Filters can be removed from the Filters area at the top of the page.
Details	Click the Go to Health Card link to access the corresponding employee health card in a new browser window or tab. See Health Card Page. Note: 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 Real Time Index for Vaccination Analytics Visualizations section in this topic for the index that is RTI-enabled for the Vaccination dashboard.
Raw or Formatted	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 Topics

- [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.

- [Reporting Vaccinations as Employees](#)
This topic discusses how employees add and update their vaccination information through Fluid Self-Service.

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:

- Application Fundamentals: Understanding PeopleSoft Insights
- *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

Page Name	Definition Name	Usage
Test Analytics Tile	HC_HS_TEST_ANALYTICS_FL (this is the cref for the tile)	Access the Test Analytics dashboard.
Test Analytics Dashboard	HC_HS_TEST_ANALYTICS_FL	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**, and then **Search Framework**, and then **Search Admin Activity Guide**, and then **Administration**, and then **Deploy/Delete Object**)
2. Build the *HC_HS_EMPL_TEST_DATA* search index.
(**PeopleTools**, and then **Search Framework**, and then **Search Admin Activity Guide**, and then **Administration**, and then **Schedule Search Index**)
3. Deploy the *Test Analytics Tile* and *Test Analytics* dashboard.
(**PeopleTools**, and then **Search Framework**, and then **Administration**, and then **Deploy Insights Dashboards**)

Note

The full index must be run before the dashboard can be deployed.

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 Topics

- Application Fundamentals: Understanding PeopleSoft Insights Using PeopleSoft Search Framework
- Application Fundamentals: Understanding Real Time Indexing in HCM

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.
Search field	Enter a query to filter data, if applicable.
 (Change all filters), and + Add filter	Enter criteria to filter data on the visualizations. You can apply filters in a number of ways: • Enter queries in the Search field. • Use the + Add filter link to create filters using fields, operators and field values. • Use delivered filter fields. • Select a chart item from a visualization. • Use the filter options in the Test Details grid to add or exclude items. • Use the legend to add or exclude items. Added filters are displayed next to the + Add filter 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. Click the Change all filters 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.

Term	Definition
 (Calendar) or Show dates	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. If you have selected a commonly used date range, for example, <i>This month</i>, or <i>Week to date</i>, click the Show dates 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> → <i>now</i>, which indicates that the selected date range started from approximately 10 months ago and ends on the current date.
Organizational Relationship, Regulatory Region, Business Unit, Department, Work Location, Job Family, Test, and Test Location	Select to filter medical test data using these delivered filter fields. Selections in the Regulatory Region field control the values that are available in the Business Unit, Department, Work Location, Job Family, and Test fields respectively.

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.

Term	Definition
 (Options)	Click the Options icon to select one of these options: <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. <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.
 (Toggle legend)	Click this icon to hide or display the legend for the chart, if available. You can click an item in the legend to change its color, or add it as a filter (if applicable).
Chart item (bar, pie slice, and so forth)	Pause over a chart item, such as a bar item or pie slice, to view a summary of details for that item. Select a chart item to add a filter for it to apply to all visualizations.

Test Analytics Tile

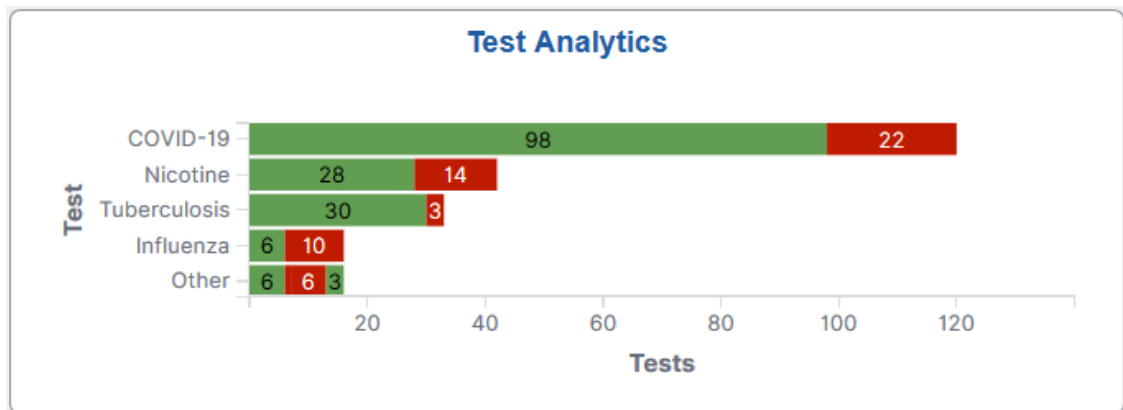
Use the Test Analytics tile to access the Test Analytics dashboard.

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.

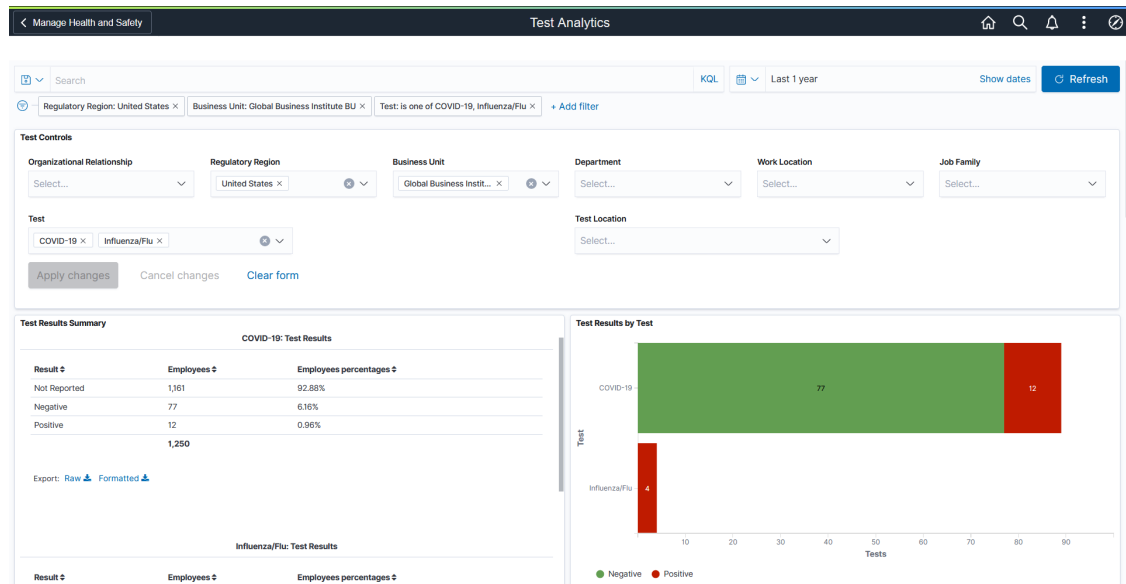
Test Analytics Dashboard

Use the Test Analytics dashboard to review and analyze medical test data using visualizations.

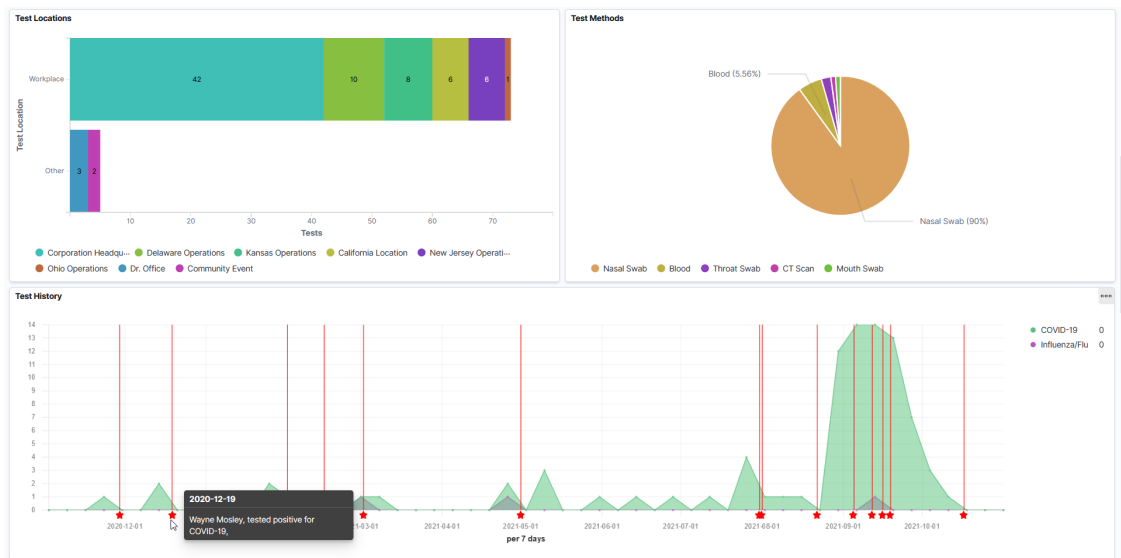
Navigation:

Select the **Test Analytics** tile.

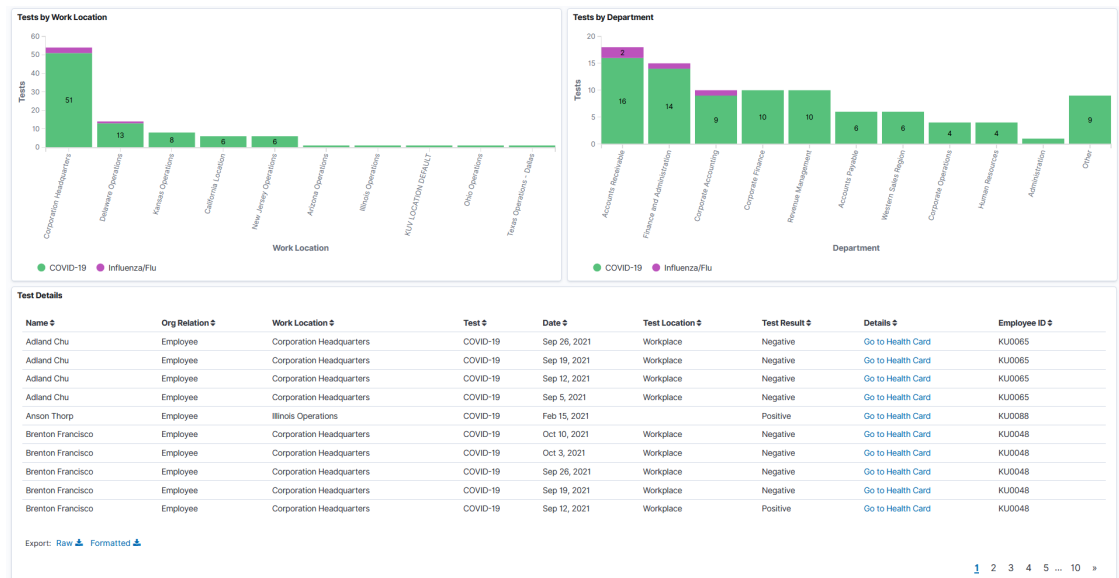
This example illustrates the Test Analytics dashboard (1 of 4).



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).

Not Reported Details

Name	Org Relation	Work Location	Department	Job Title	Test	Test Status	Details	Employee ID
1LT Ullyses Franklin	Employee	Fort Hood, TX	A Co 1/15 Infantry Bn	Infantry Platoon Leader	COVID-19	Not Reported	Go to Health Card	KUHM23
1LT Ullyses Franklin	Employee	Fort Hood, TX	A Co 1/15 Infantry Bn	Infantry Platoon Leader	Influenza/Flu	Not Reported	Go to Health Card	KUHM23
1LT Xavier Cowell	Employee	Fort Hood, TX	A Co 1/15 Infantry Bn	Platoon Leader	COVID-19	Not Reported	Go to Health Card	KUHM16
1LT Xavier Cowell	Employee	Fort Hood, TX	A Co 1/15 Infantry Bn	Platoon Leader	Influenza/Flu	Not Reported	Go to Health Card	KUHM16
1SG Russell Irvin	Employee	Ft Benning, GA	1/15 Infantry Battalion	Infantry Company First Sergeant	COVID-19	Not Reported	Go to Health Card	KUHM21
1SG Russell Irvin	Employee	Ft Benning, GA	1/15 Infantry Battalion	Infantry Company First Sergeant	Influenza/Flu	Not Reported	Go to Health Card	KUHM21
1SG William Davidson	Employee	Fort Hood, TX	A Co 1/15 Infantry Bn	Infantry Company 1st Sergeant	COVID-19	Not Reported	Go to Health Card	KUHM17
1SG William Davidson	Employee	Fort Hood, TX	A Co 1/15 Infantry Bn	Infantry Company 1st Sergeant	Influenza/Flu	Not Reported	Go to Health Card	KUHM17
APOLLO DACHSHUND	Employee	Corporation Headquarters	President	Chief Finance Officer	COVID-19	Not Reported	Go to Health Card	KUTL100
APOLLO DACHSHUND	Employee	Corporation Headquarters	President	Chief Finance Officer	Influenza/Flu	Not Reported	Go to Health Card	KUTL100

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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).

Visualization	Description
Test Results Summary	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: <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. <i>Negative or Not Detected</i>: Displays the number (and percentage of the total) of negative employee tests. <i>Positive or Detected</i>: Displays the number (and percentage of the total) of positive employee tests. Scroll down to view the information for all tests included in the dashboard.
Test Results by Test	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.
Test Locations	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.
Test Methods	This pie chart visualization displays the percentages of administered tests by test method.
Test History	This area panel displays the medical test trends by test during the specified time period. Pause over the X-axis to view the numbers of test results by test on a given date on the popup menu that appears. Pause over a star below the X-axis to view summary information of a positive test on the popup menu that appears. 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.
Tests by Work Location	This stacked vertical bar chart visualization displays the numbers of administered tests by work location and test.

Visualization	Description
Tests by Department	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.

Field or Control	Description
 (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)	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. Click the Filter for value (+ 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. Click the Filter out value (- 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. Filters can be removed from the Filters area at the top of the page.
Details	Click the Go to Health Card link to access the corresponding employee health card in a new browser window or tab. See Health Card Page. Note: 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. See the Real Time Index for Test Analytics Visualizations section in this topic for the index that is RTI-enabled for the Test dashboard.
Raw or Formatted	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 Topics

- [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.
- [Reporting Test Results as Employees](#)
This topic discusses how employees add and update their test results through Fluid Self-Service.

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
Pending Approvals - Incident Report Page	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, 'Pending Approvals' tab, 'Incident Report' tab, and icons for home, search, notifications, and settings. Below the navigation bar, the user 'Rosanna Channing' (Senior Accounting Manager) is shown with a profile picture and two buttons: 'Approve' and 'Pushback'. 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's a 'View Incident' link with a dropdown arrow. Underneath, there's a 'View Incident Details' link. The 'Approver Comments' section features a large text area for comments. At the bottom, there's an 'Approval Chain' dropdown menu with a right 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 Application Fundamentals: Pending Approvals - <Transaction Details> Page.

Field or Control	Description
Approve and Pushback	Use these buttons to take action on the requested approval. Click the Approve button if you have completed the review of the incident with no further questions. Incident data will be updated in the database. If you need more input from the employee, click the Pushback button to send the incident back one level to the requester (the employee) for update.
View Incident Details	Click to access the View Incident Page to view additional details about the incident before taking any approval action.
Approver Comments	Enter any comments related to the approval action you take.
Approval Chain	Click to open the Approval Chain page, where you can review information about all approvers for the transaction. Note: 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. When you pushed back an incident, it is shown as denied on the Approvals History page.

Related Topics

- [Understanding Fluid Health and Safety](#)
Monitor Health and Safety streamlines setup activities for administrators and delivers self-service transactions for employees in Fluid.
- [Reporting Incidents as Employees](#)
This topic discusses how to report health and safety incidents as employees.

Approving Vaccinations Using Fluid Approvals

This topic describes how to approve vaccinations using Fluid Approvals.

Page Used to Approve Vaccinations Using Fluid Approvals

Page Name	Definition Name	Usage
Pending Approvals - Vaccinations Page	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 shows the 'Pending Approvals' page for 'Vaccinations'. At the top, there's a navigation bar with a back arrow, the page title 'Pending Approvals', and a user profile for 'Christelle Stevenson, Manager-Accounting'. To the right of the profile are three buttons: 'Approve' (highlighted in blue), 'Pushback', and 'Deny'. Below this is a section titled 'Vaccination Details' with the following information: Vaccine: Covid-19, Date: 07/01/21, Manufacturer: Moderna, Dose: 1, Lot Number: 34534534, Location: Other, Vaccination Complete: No, and Comments: No address. Underneath is an 'Attachments' section with a 'View Attachments' button, 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 Application Fundamentals: Pending Approvals - <Transaction Details> Page.

Field or Control	Description
Approve, Pushback and Deny	Use these buttons to take action on the requested approval. Click the Approve 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. If you need more input from the employee, click the Pushback button to send the entry back one level to the requester (the employee) for update. Click the Deny button if you do not approve the entry, for example, if the employee added it by mistake.
View Attachments	Click to view the attachments inserted for the vaccination entry on the Attachments modal page. This link is not displayed if the entry does not have any attachments.
Approver Comments	Enter any comments related to the approval action you take.
Approval Chain	Click to open the Approval Chain page, where you can review information about all approvers for the entry. Note: 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.

Related Topics

- [Understanding Fluid Health and Safety](#)
Monitor Health and Safety streamlines setup activities for administrators and delivers self-service transactions for employees in Fluid.
- [Reporting Vaccinations as Employees](#)
This topic discusses how employees add and update their vaccination information through Fluid Self-Service.

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

Page Name	Definition Name	Usage
Pending Approvals - Test Results Page	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' page for 'Test Results'. At the top, there's a navigation bar with a back arrow, 'Pending Approvals', and 'Test Results'. Below this is a user header for 'Mei Lee, Accountant' with 'Approve', 'Pushback', and 'Deny' buttons. The main content area is titled 'Test Result Details' and shows the following information: Test: Covid-19 Viral, Date: 07/23/21, Result: Negative, Method: Nasal Swab, and Location. Below this is an 'Attachments' section with a 'View Attachments' button. There is also an 'Approver Comments' section with a text input field and an 'Approval Chain' section with a button to view the chain.

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 Application Fundamentals: Pending Approvals - <Transaction Details> Page.

Field or Control	Description
Approve, Pushback and Deny	Use these buttons to take action on the requested approval. Click the Approve 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. If you need more input from the employee, click the Pushback button to send the entry back one level to the requester (the employee) for update. Click the Deny button if you do not approve the entry, for example, if the employee added it by mistake.
View Attachments	Click to view the attachments inserted for the test results on the Attachments modal page. This link is not displayed if the entry does not have any attachments.
Approver Comments	Enter any comments related to the approval action you take.
Approval Chain	Click to open the Approval Chain page, where you can review information about all approvers for the entry. Note: 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.

Related Topics

- [Understanding Fluid Health and Safety](#)
Monitor Health and Safety streamlines setup activities for administrators and delivers self-service transactions for employees in Fluid.
- [Reporting Test Results as Employees](#)
This topic discusses how employees add and update their test results through Fluid Self-Service.

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 Application Fundamentals: Understanding PeopleSoft Fluid User Interface Homepages.

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

Page Name	Definition Name	Usage
Health and Safety Tile	HC_HS_EE_DASHBRD_FL_GBL_LINK	Access the Health and Safety dashboard, where employees can perform health and safety activities using tiles.
Health and Safety Dashboard	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.



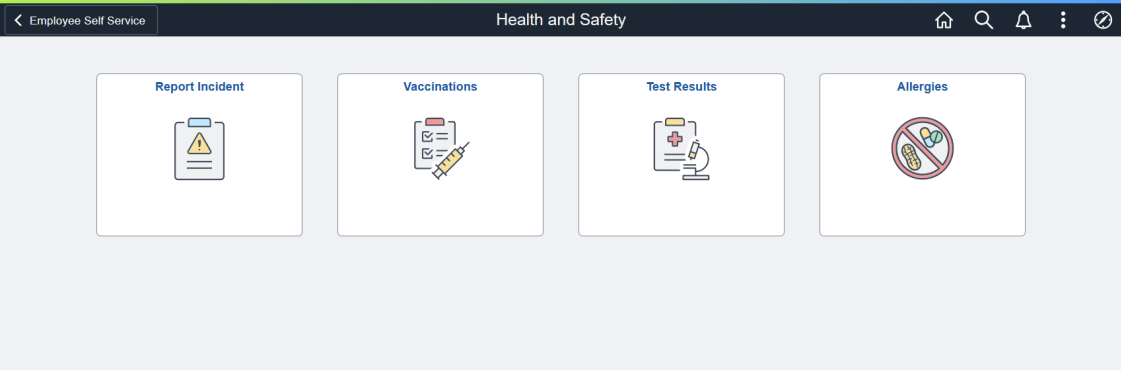
Health and Safety Dashboard

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
Report Incident Tile	Access the Report Incident - My Incidents Page and create or view incidents in a guided process.
Vaccinations Tile	Access the Vaccinations - Vaccine Details Page and create or view the employee's own vaccination information.
Test Results Tile	Access the Test Results - Test Details Page and create or view the employee's own test results.
Allergies Tile	Access the Allergies - Allergy Details Page 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

Page Name	Definition Name	Usage
Report Incident Tile	HC_HS_REPORT_INCIDENT_FL_GBL	Access the Report Incident - My Incidents page and create or view incidents in a guided process.
Report Incident - My Incidents Page	HS_INCDT_START_FL	Create, update or delete incidents as employees.
Report Incident - Welcome Page	AGC_INFO_FL	Review the message prepared by your organization about the incident reporting process.
Report Incident - Acknowledgement Page	ESIGN_FL	Review and agree to the terms and conditions before reporting incidents.
Report Incident - Report Incident Page	HS_SS_INCDRPT1_FL	Enter incident details.
Report Incident - Injury/Illness Page	HS_SS_INCDRPT2_FL	Specify injury or illness details for incidents.
Report Incident - People Connected Page	HS_SS_INCDRPT3_FL	Add individuals that are associated with incidents.
Report Incident - Attachments Page	HS_SS_ATTACH_FL	Upload related documents, such as medical certificates or pictures showing the injury, for incidents.
Report Incident - Review and Submit Page	HS_SS_INCDVIEW_FL	Review incident summary before submission.
View Incident Page	HS_SS_INCDVIEW_FL	Review incident details.

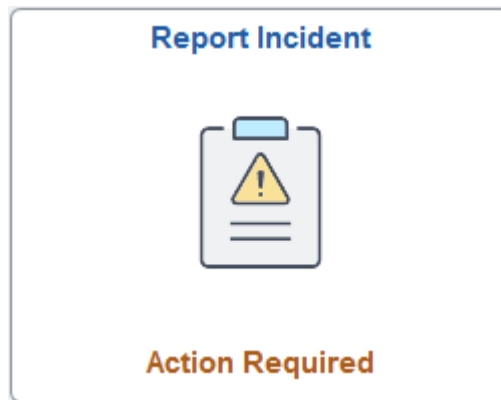
Report Incident Tile

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.

**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.

<

Health and Safety

Report Incident

Rosanna Channing

Senior Accounting Manager

Report Incident

My Incidents

2 rows

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
Report Incident	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. See Configure Incident Types Page.

My Incidents

Field or Control	Description
 (Action Required)	Indicates that the incident (status: <i>More Information Requested</i>) is pushed back by the administrator for more update. Access the Review and Submit page to view approver's comments and update the incident before submitting again.
Incident Date	Displays the date when the incident occurred.
Incident Number	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.

Field or Control	Description
Incident Type	Displays the incident type. The availability of an incident type is determined by its incident type configuration. Possible values include: <i>Accident</i> <i>Contamination</i> <i>Dangerous Occurrence</i> <i>Environmental</i> <i>Exposure</i> <i>Hazardous Condition</i> <i>Illness</i> <i>Incident</i> <i>Industrial Accident</i> <i>Industrial Accident (Official)</i> <i>Injury</i> <i>Near Miss</i> <i>Safety Violation</i> <i>Unsafe Practice</i> <i>Vehicle/Equipment Accident</i> See Configure Incident Types Page .
Description	Displays the incident description.
Status	Displays the incident's current status. Values are: <i>In Progress</i> : the incident has been created for update, and not yet submitted. <i>More Information Requested</i> : the incident has been pushed back by the administrator. <i>Received</i> : the incident has been submitted (no approval used), or approved (approval used). <i>Submitted</i> : the incident has been submitted and is pending approval.
Delete	Click to delete the corresponding incident. You can only delete incidents that are currently <i>In Progress</i> .
Edit/View	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 *HS1* acknowledgement ID on the Acknowledgement Configuration page. Administrators can also track employee acknowledgements using the Acknowledgement Framework. For more information, see Enterprise Components: Setting Up the Acknowledgement Framework.

This example illustrates the layout for the Report Incident pages for a medium form factor device.

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 Report Incident - My Incidents Page .

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.

Field or Control	Description
Previous or Next	Click to navigate to the previous or next step of the <i>Report Incident</i> activity guide.

Field or Control	Description
Save	Click to save the data of the current step at any time.
Submit	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 Report Incident - Review and Submit Page .

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 Topics

- Enterprise Components: Managing Activity Guide Templates

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 Enterprise Components: Configure Page Text Page.

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

*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

Exact Location SECOND FLOOR PANTRY, BUILDING 1

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

Field or Control	Description
Location Type	(Required) Select the type of location where the incident occurred. Values are: <i>Offsite</i> <i>Workplace</i>
Add Address	Click to enter the address of the incident location. This button appears if <i>Offsite</i> is selected.

Field or Control	Description
Name	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. Locations are defined using the Location component. See Also Application Fundamentals: Understanding Locations.
Address	Displays the specified incident location address.
Exact Location	Enter information to identify exactly where the incident occurred. For example, if you fell on a slippery floor in the pantry, enter something like “Second floor pantry, Building 1”.

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 more details for your injury or illness.

Field or Control	Description
Body Part Affected	Select the primary body part directly affected by the injury or illness. Body parts are defined using the Body Part Table or Body Parts (BODY_PART_TABLE) component.
Nature of Injury/Illness	Select the primary physical characteristics of the injury or illness, for example, puncture wound, concussion, or contact dermatitis. Natures of Injury are defined using the Nature Of Injury Table or Nature Of Injury (INJURY_NATURE_TBL) component.
Source of Injury/Illness	Select the primary object, equipment or factor responsible for the injury or illness, for example, powered hand tools, excessive noise, or radiating equipment. Sources of Injury are defined using the Source Of Injury Table or Source Of Injury (INJURY_SOURCE_TBL) component.
Event or Exposure	Select the primary manner in which the injury or illness was produced, for example, struck by flying objects, or contact with electric current. Events or exposures are defined using the Accident Type Table or Accident Types (ACCIDENT_TYPE_TBL) component.

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 >

Field or Control	Description
Add Workplace Contact	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).
Add Other Contact	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

				1 row
Attachments ▾	Description ▾	Attached By ▾	Attached On ▾	
InjuredFoot.png	Picture of my injured foot	Rosanna Channing	09/11/20 01:18:13 PM	

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
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
InjuredFoot.png	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	
Betty Locherty at 09/11/20 - 3:56 PM wrong image	
System at 09/11/20 - 3:54 PM Requester (RCHANNING) is approver on step number 1, path 1, stage 10, which has self-approval disabled! (18081,1031)	
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).

The screenshot displays the 'View Incident' page in a web application. The header shows a navigation bar with 'Health and Safety' and 'View Incident' tabs. Below the header, there is a user profile for Rosanna Channing, Senior Accounting Manager. The main content area is divided into several sections:

- Incident Details:** Includes fields for Incident Number (70000011), Incident Type (Incident), Description (Fell on wet pantry floor while getting coffee), Date (09/10/2020), Time (9:00AM), and Time Zone (PST).
- Incident Location:** Includes fields for Location Type (Workplace), Name (Corporation Headquarters), Address (500 George Washington Pkway, New York, NY 07666), and Exact Location (SECOND FLOOR PANTRY, BUILDING 1).
- Injury/Illness Details:** Includes fields for What happened as a result of the incident? (Injury), Description (Several cuts from broken mug), and Treatment Received (First Aid).
- Additional Details:** Includes fields for Body Part Affected (Foot), Nature of Injury/Illness (Cut, laceration, puncture-wound), Source of Injury/Illness, and Event or Exposure.
- People Connected:** This section is visible at the bottom but contains no data.

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
InjuredFoot.png	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

Page Name	Definition Name	Usage
Vaccinations Tile	HC_HS_SS_IMMUN_FL_GBL	Access the page to review your vaccination information.
Vaccinations - Vaccine Details Page	HS_SS_IMMUN_FL	Review your vaccination information.
Add Vaccination Page	HS_SS_ADD_VACC_SCF	Add new vaccination information.
Vaccine Details Page	HS_SS_IMMUN_SCF	Enter or view your vaccination information.
View Vaccine Details Page	HS_SS_IMMUNVIEW_FL	View information of approved vaccination entries.

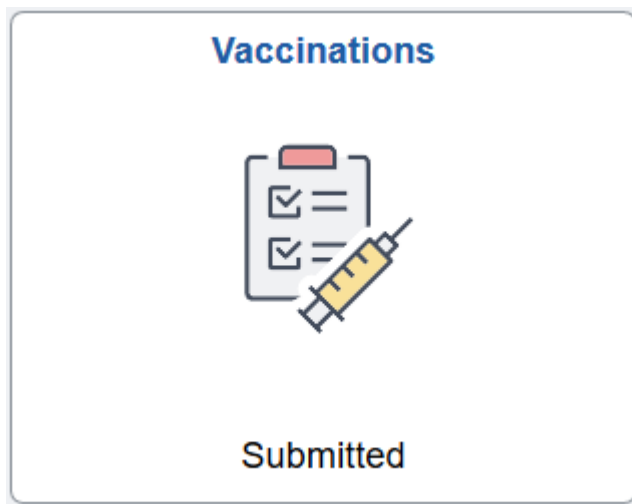
Vaccinations Tile

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

Vaccine Details

	Date ▾	Vaccine ▾	Status ▾	Last Updated By ▾	
	08/27/2021	Covid-19	Employee Declined	Betty Locherty	>
	08/27/2021	Tetanus	Employee Declined	Rosanna Channing	>
	08/23/2021	Shingles	Recorded	Rosanna Channing	>
	08/03/2021	Influenza	Request Denied	Betty Locherty	>
	08/02/2021	Shingles	Recorded	Betty Locherty	>
	08/01/2021	Influenza	Recorded	Betty Locherty	>

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





Date
08/27/2021

Vaccine
Covid-19 

Status
Employee Declined

Last Updated By
Betty Locherty



Date
08/27/2021

Vaccine
Tetanus 

Status
Employee Declined

Last Updated By
Rosanna Channing

Date
08/23/2021

Vaccine
Shingles 

Status
Recorded

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.

Field or Control	Description
Add Vaccination or  (Add Vaccination)	Select the button to report a vaccination that you had.
 (Action Required)	Indicates that the corresponding entry (status: More Information Requested) is pushed back by the administrator for more update. Access the Vaccine Details Page to view approver's comments and update the entry before submitting again.
 (Employee Declined)	Indicates that you have declined taking the associated vaccine.
Date	Displays the date the vaccine was given to you. In case of declination, it shows the date you declined the vaccine.
Vaccine	Displays the name of the vaccine.
Status	Displays the current status of the vaccination entry. Values are: <i>Approved</i> : the entry has been approved by the administrator. <i>Employee Declined</i> : the entry pertains to a vaccine that has been declined by the employee. <i>More Information Requested</i> : the entry has been pushed back by the administrator. The employee needs to update the entry and resubmit. <i>Recorded</i> : the entry has been saved (no approval). <i>Request Denied</i> : the approval of the entry has been denied by the administrator. <i>Submitted</i> : the entry has been submitted and is pending approval. If a row is added for the employee by the administrator, the status of <i>Recorded</i> is displayed.
Last Updated By	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.

Cancel

Add Vaccination

Continue

*Vaccine

▼

☐ Decline Vaccine

Field or Control	Description
Vaccine	Select the vaccine that you took and would like to report. Vaccines are defined in the Immunization component. 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. See Immunization Page and Immunization - Self-Service Page .
Decline Vaccine	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.

Cancel

Vaccine Details

Save

Vaccine

Covid-19

*Date

Manufacturer

Dose

Lot Number

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 Vaccine Details page in edit mode, when you are adding a new entry for declining a vaccine.

Cancel

Vaccine Details

Save

Vaccine

Shingles

Date

07/27/2021

Decline Vaccine

☒

Reason

Allergic Reaction

Comments

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 x

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

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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

Date/Time Stamp 07/27/2021 4:36:54PM

Name John Patterson

Approvals

Vaccination Approval

▼ Vaccination Approvals

Vaccination Approval

Pending

[Multiple Approvers](#)
Health and Safety Admin

Pending

>

The setup of the selected vaccine controls the availability of fields and sections that appear on this page.

Field or Control	Description
Vaccine	Displays the vaccine selected previously. Note: Vaccine and Date fields are read-only when you update an existing entry that is pushed back by the administrator.
Date	Enter the date you took the vaccine. Do not enter a future date. If you choose to decline taking the selected vaccine, the system populates the current date.
Manufacturer	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.

Field or Control	Description
Dose	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. This field appears if manufacturer information is specified in the setup of the selected vaccine. It becomes editable when a manufacturer is selected.
Lot Number	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.
Location	Select the type of location where you took the vaccine. Values are: <i>Other</i> <i>Workplace</i>
Location Name	Displays your work location by default and is editable, if <i>Workplace</i> is selected. This field appears as a free form field if <i>Other</i> is selected.
Add Address	Click to enter the address of the vaccination 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.
Decline Vaccine	Displays <i>Yes</i> if you have declined taking the vaccine.
Reason	Select the reason for declining the vaccine, if the Decline Vaccine check box is selected. Values are: <i>Allergic Reaction</i> <i>Medical Exemption</i> <i>Personal Reasons</i> <i>Religious Beliefs</i>
Comments	Enter comments about the vaccination, if any.

Field or Control	Description
Next Due Date	Displays the due date of the next vaccination. It means the next first dose if the selected vaccine is a multi-dose series. The field value appears if the schedule information is specified in the setup of the selected vaccine, and: • The vaccination you are reporting is either for a single-dose vaccine, or the last dose of a multi-dose series. Or, • The manufacturer information is not available in the vaccine setup. The next vaccination due date is calculated as: Next due date = vaccination date of the single-dose vaccine (or last dose of the multi-dose series) + vaccine schedule

Attachments

This section appears if attachments are enabled (or required) in the setup of the selected vaccine.

Field or Control	Description
Add Attachment	Select to upload supporting documents.
Attachments	Displays the link of the uploaded attachment, if available. You have the option to delete attachments when you update an existing entry.
Description	Enter the description of the attachment.
Attached By and Attached On	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.

View Vaccine Details

Manager Self Service | John Patterson | Manager-Reverse

Vaccine: Influenza
Date: 01/01/2021
Location: Other
Comments:
Next Vaccination Due: 01/01/2022

Attachments
You have not added any Attachments.

Acknowledgement
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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
Test Results Tile	HC_HS_SS_TEST_FL_GBL	Access the page to review your test result information.

Page Name	Definition Name	Usage
Test Results - Test Details Page	HS_SS_TEST_FL	Review your test results.
Add Test Result Page	HS_SS_ADD_TEST_SCF	Add new test results.
Test Details Page	HS_SS_TEST_SCF	Enter or view your test result information.
View Test Results Page	HS_SS_TESTVIEW_FL	View information of approved test result entries.

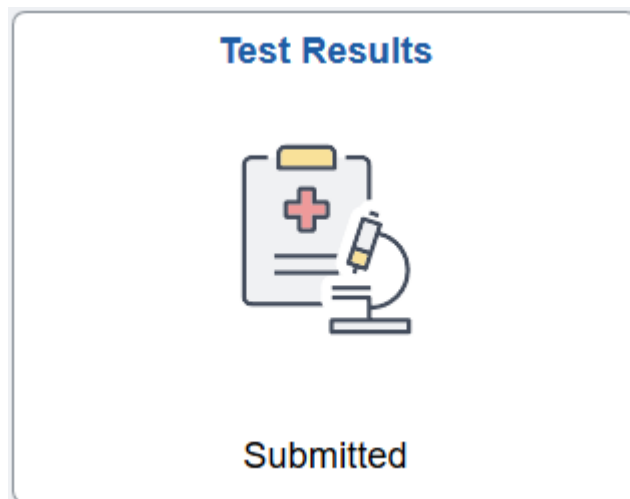
Test Results Tile

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

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.

Field or Control	Description
Add Test Result or  (Add Test Result)	Select the button to add your test results.
 (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.
Date	Displays the date the test was taken.
Test	Displays the name of the test.
Status	Displays the current status of the test results. Values are: <i>Approved:</i> the entry has been approved by the administrator. <i>More Information Requested:</i> the entry has been pushed back by the administrator. The employee needs to update the entry and resubmit. <i>Recorded:</i> the entry has been saved (no approval). <i>Request Denied:</i> the entry has been denied by the administrator. <i>Submitted:</i> the entry has been submitted and is pending approval.
Last Updated By	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 Health Card Page).

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	Select the type of test to report. Tests are defined using the Test component (HS_TEST_TBL). 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. See Test Page and Test - Self-Service Page.

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

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☐ 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

x

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

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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. Note: Test and Date 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: <i>Other</i> <i>Workplace</i>
Location Name	Displays your work location by default and is editable, if <i>Workplace</i> is selected. 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.
Comments	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.

Field or Control	Description
Add Attachment	Select to upload any supporting documents.

Field or Control	Description
Attachments	Displays the link of the uploaded attachment, if available. You have the option to delete the attachment when you add or update an entry.
Description	Enter the description of the attachment.
Attached By and Attached On	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.

Manager Self Service View Test Details

John Patterson
Manager-Revenue

Test: Influenza
Date: 07/01/2021
Result: Test Invalid
Method:
Location:
Comments:

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 :07/29/2021 5:07:44PM

Approvals
Test Approval

Test Approvals	Approved
Test Approval Approved Betty Locherty Health and Safety Admin 07/29/21 5:10 PM	

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
Allergies Tile	HC_HS_SS_ALLERGY_FL_GBL	Access the page to review your allergy information.
Allergies - Allergy Details Page	HS_SS_ALLERGY_FL	Review your allergy information.
Add Allergy Page	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.

A screenshot of a web application interface. At the top, there 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". The table has two rows: "Animal Dander" and "Fish and Shellfish". Each row has a right-pointing chevron icon. There is a plus icon in a box above the table.

This example illustrates the fields and controls on the Allergies - Allergy Details page that is displayed on a small form factor device.

 Allergies  

**John Patterson** 
Manager-Revenue

Allergy Details



Allergy
Fish and Shellfish

Comments
Shellfish mainly

Allergy
Animal Dander

Comments

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.

Field or Control	Description
Add Allergy or  (Add Allergy)	Select the button to add an allergy that you have.
Allergy	Displays the name of the allergy.
Comments	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

Field or Control	Description
Allergy	Select the allergy you would like to report. Allergies are defined on the Allergy page (ALLERGY_TBL). An allergy becomes available for selection if it matches the regulatory region of the employee. This field is read-only when you update an existing allergy entry.
Comments	Enter information about your allergy, for example, severity, symptoms, or things co-workers should know when there is an allergic reaction.
Delete	Select to delete the allergy information. This field appears when you open an existing entry.