Oracle

Global Human Resources Cloud
Using Workforce Health and Safety Incidents

Release 13 (update 18B)
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Preface

This preface introduces information sources that can help you use the application.

Using Oracle Applications

Using Applications Help

Use help icons to access help in the application. If you don’t see any help icons on your page, click your user image or name in the global header and select Show Help Icons. Not all pages have help icons. You can also access Oracle Applications Help.

Watch: This video tutorial shows you how to find help and use help features.

You can also read Using Applications Help.

Additional Resources

• **Community:** Use Oracle Cloud Customer Connect to get information from experts at Oracle, the partner community, and other users.

• **Guides and Videos:** Go to the Oracle Help Center to find guides and videos.

• **Training:** Take courses on Oracle Cloud from Oracle University.

Conventions

The following table explains the text conventions used in this guide.

<table>
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<th>Convention</th>
<th>Meaning</th>
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<tr>
<td><strong>boldface</strong></td>
<td>Boldface type indicates user interface elements, navigation paths, or values you enter or select.</td>
</tr>
<tr>
<td><strong>monospace</strong></td>
<td>Monospace type indicates file, folder, and directory names, code examples, commands, and URLs.</td>
</tr>
<tr>
<td>&gt;</td>
<td>Greater than symbol separates elements in a navigation path.</td>
</tr>
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</table>

Documentation Accessibility

For information about Oracle’s commitment to accessibility, visit the Oracle Accessibility Program website.

Videos included in this guide are provided as a media alternative for text-based help topics also available in this guide.
Contacting Oracle

Access to Oracle Support
Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit My Oracle Support or visit Accessible Oracle Support if you are hearing impaired.

Comments and Suggestions
Please give us feedback about Oracle Applications Help and guides! You can send an e-mail to: oracle_fusion_applications_help_ww_grp@oracle.com.
1 Introduction

Using Workforce Health and Safety Incidents: Overview

Organizations need to implement an incident reporting system for managing work-related risks that could cause serious injury, illness, or even death. Also, many health standards and regulations in various jurisdictions at state and national levels require organizations to identify potential hazards such as unsafe working conditions and near misses.

Workforce Health and Safety Incidents provides the following key features:

- Enables rapid incident reporting of incident event types such as vehicle incident, environmental spills or releases, near misses, property damage, and notice of violation.
- Identifies unsafe working conditions to prevent an actual injury or illness occurring in the future.
- Efficiently assigns and reminds incident owners of incident activities.
- Allows you to create analytics and reports to monitor progress and detect patterns and trends.
- Secures data and functions by roles and privileges.
- Leverages HCM Cloud Global HR data and processes so you can get up and running quickly.

Workforce Health and Safety Incidents can benefit any large or small organization by:

- Creating a safer work environment.
- Reducing the level of risks and disruptions and the costs associated with an incident.
- Ensuring that you comply with laws.
- Facilitating regulatory reporting.
- Identifying and correcting shortcomings in the health and safety management programs.
The following image shows the business activities for different roles in Workforce Health and Safety Incidents:

Workforce Health and Safety Incidents provides two applications, a casual and simple user experience for reporting incidents and a professional user experience for reporting, managing, and resolving an incident.

Safety Incidents

Safety Incidents allows you to quickly create an incident using a simple three-step process. This application can be used by every employee to create an incident by providing minimal details. Employee-related information is auto-filled from the employee’s HR profile. This incident is then routed to the Safety Incidents professional UI for resolution. Ideally, every employee should have access to Safety Incidents.
Safety Incidents Professional UI

Depending on your roles and privileges, use Safety Incidents to perform the following tasks:

- Record an incident
- Manage incident event types
- Track the incident status and progress and how employees are performing against assigned target completion dates
- Manage incident investigations
- Record root causes of the incident
- Track corrective and preventive actions

Related Topics

- Creating an Incident using Safety Incidents: Explained
- Creating Incidents using Safety Incidents Professional UI: Explained
- Creating Reports and Analytics: Explained

Safety Incident Roles: Explained

The Workforce Health and Safety Incidents data and pages are secured by roles and privileges. By default, the Environment, Health, and Safety Manager role is available and can access all the pages and perform all tasks. The EHS Manager can create new roles and assign privileges based on the size and need of the organization.

The following privileges are available with the application. By default, all the privileges are assigned to the EHS Manager role.

<table>
<thead>
<tr>
<th>Privilege Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create Environment Health and Safety Incident</td>
<td>Allows creation of an incident.</td>
</tr>
<tr>
<td>Create Environment Health and Safety Incident Action</td>
<td>Allows creation of an incident action.</td>
</tr>
<tr>
<td>Create Environment Health and Safety Incident Event</td>
<td>Allows creation of an incident event.</td>
</tr>
<tr>
<td>Create Environment Health and Safety Incident Investigation</td>
<td>Allows creation of an incident investigation.</td>
</tr>
<tr>
<td>Create Self-Serve Environment Health and Safety Incident</td>
<td>Allows creation of a self-service incident.</td>
</tr>
<tr>
<td>Delete Environment Health and Safety Incident</td>
<td>Allows deletion of an incident.</td>
</tr>
</tbody>
</table>
### Privilege Name | Description
--- | ---
Delete Environment Health and Safety Incident Action | Allows deletion of an incident action.
Delete Environment Health and Safety Incident Event | Allows deletion of an incident event.
Delete Environment Health and Safety Incident Investigation | Allows deletion of an incident investigation.
Manage Environment Health and Safety Configuration Settings | Allows update of configuration settings.
Update Environment Health and Safety Incident | Allows update of an incident.
Update Environment Health and Safety Incident Action | Allows update of an incident action.
Update Environment Health and Safety Incident Event | Allows update of an incident event.
Update Environment Health and Safety Incident Investigation | Allows update of an incident investigation.
View Environment Health and Safety Incident | Allows viewing of an incident.
View Environment Health and Safety Incident Action | Allows viewing of an incident action.
View Environment Health and Safety Incident Event | Allows viewing of an incident event.
View Environment Health and Safety Incident Investigation | Allows viewing of an incident investigation.

To create reports and analytics, you must inherit the Environment, Health and Safety Transaction Analysis Duty role with the role code FBI_ENVIRONMENT_HEALTH_AND_SAFETY_TRANSACTION_ANALYSIS_DUTY. By default, the EHS Manager inherits this role.
2 Setting Up Workforce Health and Safety Incidents

Implementing Workforce Health and Safety Incidents: Explained

Before you begin using Safety Incidents, you must perform the following setup tasks:

- Enable Workforce Health and Safety Incidents offering
- Assign a user to the Environment, Health, and Safety Manager role.
- Configure email address.
- Configure target completion dates.
- Configure lookup values.
- Manage questionnaires
- Configure email alerts

Configure email address, target completion dates, and lookup values using the Define Environment, Health, and Safety Setup task in the Setup and Maintenance work area.

If you have implemented Oracle Fusion Global Human Resources, which is required for Environment, Health, and Safety Incidents, you have completed many prerequisite tasks.

Enabling Workforce Health and Safety Incidents Offering

Before setting up Safety Incidents, you must enable the Workforce Health and Safety Incidents functional area for implementation.

1. Click Navigator > Setup and Maintenance.
2. In the Setup list, select Workforce Deployment.
3. Click Change Feature Opt In.
4. In the Workforce Health and Safety Incidents row, select the Enable check box.
5. Click Done.

You can now view Workforce Health and Safety Incidents in the functional area.

Assigning the Environment Health and Safety Manager Role

By default, the Environment, Health, and Safety Manager role is available with the application. This role has the privileges to perform every task in the Safety Incidents application. The implementor must assign a user to the EHS Manager role.

1. Click Navigator > Tools.
2. Click Security Console.
3. In the User Accounts tab, search the user that you want to assign the role.
4. Click the role to open the role details.
5. Click Edit and click Add Role.
6. In the Add Role Membership window, search Environment, Health and Safety Manager.
7. Select the role and click Add Role Membership.
8. Click Done.
9. Click Save and Close.

The user assigned to the Environment, Health, and Safety Manager role can now create more user roles and assign privileges according to the size and need of the organization.

Configuring Email Address
When creating an incident, you can send attachments related to the incident, such as photos or documents, to the EHS Manager. The EHS Manager must first configure the email address in the Define Environment, Health, and Safety Setup section of the Setup and Maintenance area.

1. Click Navigator > Setup and maintenance.
2. Click Define Environment, Health and Safety Setup.
3. Click Manage Environment, Health, and Safety Attachment Address.
4. Enter the email address.
5. Click Save and Close.

Configuring Target Completion Dates
In an incident report, the target completion dates, target review dates, target approval dates, and target preapproval dates are set to sixty days from the date of the incident creation by default. The EHS Manager can update these values.

To update the target dates:

1. Click Navigator > Setup and maintenance.
2. Click Define Environment, Health and Safety Setup.
3. Click Manage Environment, Health, and Safety Incident Completion Dates. The default number of days is loaded.
4. You can edit the target dates.

Configuring Lookup Types
Lookups are lists of values in an application. Lookup type consists of a set of lookup codes and each code’s translated meaning. End users see the list of translated meanings as the available values for an object. The configuration level of a lookup type determines whether you can edit the lookup type. The configuration levels are User, Extensible, and System. You can only modify the lookup types that have the Configuration Level as User. You can also create new lookup types with the configuration level as User.

To edit or create lookup types in Safety Incidents:

1. Click Navigator > Setup and maintenance.
2. Click Define Environment, Health and Safety Setup.
4. Search for the ORA_HNS lookup type. The default lookup types and their descriptions are available.
5. Update the lookup types as necessary.

Manage Questionnaires
Use the Workforce Health and Safety Standard Investigation Questionnaire to gather information about the incident event. You can also edit the standard questionnaire or create a questionnaire to suit your organization’s requirements. This
topic describes aspects of questionnaire creation and maintenance. Use the Manage Questionnaire Templates, Manage Questionnaires, and Manage Question Library tasks in the Setup and Maintenance work area.

To edit the Workforce Health and Safety Standard Investigation questionnaire:

1. Navigate to the Manage Questionnaires task in the Setup and Maintenance work area.
2. Search for the Manage Questionnaire Template task.
3. To see the available templates, select Workforce Health and Safety Incidents in the Subscriber list and click Search.
4. Click Workforce Health and Safety Standard Investigation and click Edit.
5. You can update the basic information of the questionnaire, provide instructions and help materials, and add attachments. Click Next.
6. Based on your organization’s needs, make updates to the contents, sections, and questions area.
7. Click Next.
8. Review your changes.

To create a questionnaire:

1. Navigate to the Manage Questionnaires task in the Setup and Maintenance work area.
2. In the Search Results section of the Manage Questionnaires page, click Create. The Create Questionnaire dialog box opens.
3. Enter Questionnaire Template ID or Name values, if available. Alternatively, click Search to list all the available templates.
4. In the Search Results section, select a template and click OK. The Create Questionnaire: Basic Information page opens.
5. A unique numeric questionnaire ID appears automatically. You can overwrite this value.
6. Enter a questionnaire name and select a folder. Use folders to organize questionnaires by type or purpose, for example.
7. Leave the Owner field blank and the Privacy value set to Public if anyone who can access the questionnaire can edit it. Otherwise, select an owner and set Privacy to Private.
8. In the Subscriber field, select Workforce Health and Safety Incidents. Other applications can’t use the questionnaire if you select a subscriber.
9. Leave the Status value set to Draft until the questionnaire is ready.
10. In the Instructions and Help Materials section, enter and format any instructions for questionnaire users. This text appears at the top of page one of the questionnaire.
11. Add file or URL attachments, if appropriate. Links appear at the top of the questionnaire and beneath any instruction text.
12. Click Next. The Create Questionnaire Contents page opens.
13. Select the first section to view its questions in the Questions section. You can delete a question or change its response type and Required setting.
14. If you create additional sections, you can add questions to them. In the Questions section, click Add to open the Add Questions dialog box. Search for a question, select it, and click OK.
15. When all sections and questions are complete, click Next to open the Create Questionnaire Review page.
16. Click Preview to preview the questionnaire.
17. Click OK to close the Preview dialog box.
18. Click Save to save your questionnaire.
19. Set the questionnaire Status value to Active when the questionnaire is ready for use.

Configure Email Alerts

Oracle Fusion HCM provides the Alerts Composer Tool that allows you to send emails or notifications triggered by an event. The following alerts are available for Workforce Health and Safety Incidents:
### Setting Up Workforce Health and Safety Incidents

<table>
<thead>
<tr>
<th>Alert Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>HNS_ Worker_ Notification_ Appointed</td>
<td>An email notification is sent when an employee is assigned as an:</td>
</tr>
<tr>
<td></td>
<td>• Incident Owner, Reviewer, or Approver</td>
</tr>
<tr>
<td></td>
<td>• Incident Event Owner</td>
</tr>
<tr>
<td></td>
<td>• Incident Investigation Owner, Reviewer, or Approver</td>
</tr>
<tr>
<td></td>
<td>• Incident Action Owner, Reviewer, or Approver</td>
</tr>
<tr>
<td>HNS_ Worker_ Notification_ Removed</td>
<td>An email notification is sent when an employee is removed as an:</td>
</tr>
<tr>
<td></td>
<td>• Incident Owner, Reviewer, or Approver</td>
</tr>
<tr>
<td></td>
<td>• Incident Event Owner</td>
</tr>
<tr>
<td></td>
<td>• Incident Investigation Owner, Reviewer, or Approver</td>
</tr>
<tr>
<td></td>
<td>• Incident Action Owner, Reviewer, or Approver</td>
</tr>
<tr>
<td>HNS_ Worker_ Notification_ Report_ Incident</td>
<td>An email notification is sent to thank an employee for reporting the incident.</td>
</tr>
</tbody>
</table>

Navigate to **Tools > Alerts Composer** work area. By default, these email alerts are turned off for Workforce Health and Safety Incidents. To turn on the email alerts:

1. Click **Navigator > Tools > Alerts Composer**.
2. Search the required Workforce Health and Safety Incidents alert name.
3. Click the alert name to open the Edit Event Alert page.
4. Click the **Run Options** tab.
5. Select the **Simulate Run** value as **No**.
6. Click **Save and Close**.
Creating Safety Incidents

Creating an Incident using Safety Incidents: Explained

Use the Safety Incidents application to quickly report an incident. If Safety Incidents is not visible in the work area, contact your EHS Manager.

To create an incident:

1. Click Navigator > Safety Incidents.
2. In the Create Incident Report: Event page, you can select the agencies that have been notified of the incident.
3. Optionally, you can select one or more incident event types to describe the type of incident such as Injury or Illness, Near Miss, Vehicle Incident, and so on.
4. Click Next.
5. In the Create Incident Report: Reporter page, enter the reporter details, date and time of the incident, and the incident location details.
6. Click Next.
7. In the Create Incident Report: Summary page, enter the incident summary, description, and the immediate actions required.
8. Click Submit.

The incident is created and routed to the EHS Manager for resolution.

Creating Incidents using Safety Incidents Professional UI: Explained

Depending on your roles and privileges, use the Safety Incidents professional UI to create a detailed incident report and manage incidents. When an employee creates an incident using Safety Incidents, the incident is routed to the EHS Manager for resolution. The EHS Manager must assign an incident owner who can manage and resolve the incident.

The Safety Incidents work area includes the following pages:

- Incident Details
- Incident Events
- Investigations
- Actions
- Attachments

Incident Details

Using the Incident Details infotile, you can capture details about the incident such as date and time, location, notes, related incidents, incident owners, and so on. The incident owner is responsible for acknowledging the completion of an incident report.

To enter the incident details:

1. In the Incident Details infotile, select the appropriate Incident Reporter option.
2. Enter the date and time of the incident.
3. In the Incident Location area, enter the incident location details.
4. Enter the summary of the incident.
5. Optionally, in the Agencies and Related Incidents area, you can select the agencies that were notified of the incident. You can also select a related incident for reference if you have a role in that related incident.
6. In the Incident Sign Off area, assign an incident owner and the target completion date.
7. Optionally, you can also assign incident reviewers and approvers.
8. Click **Save**.

### Incident Events

Incident Events pages are designed to collect detailed information specific to an event type, such as Injury or Illness, Vehicle Incident, Near Miss, Unsafe Condition, Property Damage, Spill or Release, and Notice of Violation. You can create multiple incident events at the time of reporting or managing the incident. Incident events can be assigned to one or more owners.

To create an incident event:

1. Click the Incident Events infotile.
2. Click **Create: Incident Event** and select the incident event type.
3. Enter details in the fields that are specific to the incident event type.
4. Assign Incident Event Owners and the target completion date.
5. Click **Save**.

### Investigations

Create and manage investigations to identify the root cause of the incident. The investigator can gather and analyze data, note investigation findings, and recommend corrective actions necessary to prevent future incidents. You can create multiple investigations at the time of reporting or managing the incident. Assign investigation owners who can acknowledge the investigation completion.

To create an investigation:

1. In the Investigations infotile, click the **Create Investigation** icon.
2. Enter details such as the date and time and investigation summary.
3. Optionally, you can select the investigation type, incident event, and add notes.
4. You can use the investigation questionnaire to answer questions related to the incident. To use the questionnaire:
   a. Click **Search**.
   b. Search for the Workforce Health and Safety Standard Investigation questionnaire or any other questionnaire that you have created.
   c. Select the questionnaire and click **Apply**.
5. Click the **Add** icon to create findings.
6. In the Finding area, enter the finding summary and other appropriate fields.
7. Optionally, you can create recommendations for every finding.
8. In the Incident Investigation Sign Off area, assign incident investigation owners who can acknowledge the investigation completion.
9. Optionally, you can assign incident investigation approvers and reviewers.
10. Click **Save**.

### Actions

Create one or more actions to remediate the cause(s) of the incident, near misses, or unsafe conditions. Also, you can create actions based on the recommendations provided by the Investigator Owner in the Investigations page. You can assign multiple action owners.
To create an action:

1. In the Actions infotile, click the Add icon.
2. In the Create Action page, enter the date and time.
3. Enter the action summary. You can also add a description.
4. Select the action type.
5. Select the action priority.
6. Optionally, you can select the resources required, estimated cost, and notes.
7. In the Incident Action Sign Off section, assign incident action owners and the target completion dates.
8. Optionally, you can assign incident action approvers and reviewers.
9. Click Save.

Attachments

You can add attachments related to the incident such as photos or documents to help resolve the incident.

To add attachments:

1. In the Attachments infotile, click Add.
2. In the Type column, select the attachment type.
3. In the File Name or URL column, click Choose File and navigate to the file path.
4. Click Open. The Title field is updated with the file name.
5. You can enter a description of the file.
6. Click Save.

The incident is created and the status is set to Open. The incident is visible to the EHS Manager and all the assignees in the Dashboard area.
4 Managing Safety Incidents

Closing Incidents: Explained

The status of an incident is visible in the Dashboard of Safety Incidents. When an incident is created and in progress, the status remains Open.

To change the incident status to Closed, the following criteria must be met:

- In the Incident Events page, all Incident Event Owners must select the Completed check box.
- In the Investigations page:
  - If applicable, all Incident Investigation Reviewers and Approvers must select the Completed check box.
  - All Incident Investigation Owners must select the Completed check box.
- In the Incident Details page:
  - If Applicable, all Incident Reviewers and Approvers must select the Completed check box.
  - All Incident Owners must check the Completed check box.

An incident can be completed and closed even though actions remain open.

FAQs for Managing Incidents

Why am I unable to link a related incident?

Only an incident owner, reviewer, or approver can link an incident if they have an assigned role in the related incident. The linked related incident is available to the incident owner, reviewer, and approver in the read only mode.

How can I close an incident event?

To close an incident event, all incident event owners must select the Completed check box in the Incident Events page. In the closed state, the incident event is available in the read only mode to the incident event owners.

How can I close an incident action?

To close an action, all incident action owners must select the Completed check box in the Actions tab. If applicable, all reviewers must select Reviewed and all approvers must select Approved.

A closed action can be reopened only by an incident owner.
How can I delete an incident?

Only an Environment, Health, and Safety Manager can delete an incident. To delete an incident, log in to the Safety Incident application and search for the incident you want to delete. Click the Delete icon.

How can I reopen an incident?

Only an Environment, Health, and Safety Manager can reopen a closed incident. To reopen an incident, navigate to the Incident Sign Off section in the Incident Details page and ensure the Completed check box is unchecked.
5 Analytics and Reports

Creating Reports and Analytics: Explained

Use Oracle Business Intelligence (BI) Publisher to author, generate, and deliver reports and analysis for Workforce Health and Safety Incidents. You need the FBI_ENVIRONMENT_HEALTH_AND_SAFETY_TRANSACTION_ANALYSIS_DUTY role to create reports. By default, the EHS Manager has the privileges assigned to create reports.

Creating a report

Reports, analyses, dashboards, and other business intelligence (BI) objects are stored and administered in the business intelligence catalog.

To create a report:

1. In the Navigator, click Tools > Reports and Analytics.
2. Click Create.
3. In the Select Subject Area window, select Environment Health and Safety - Incidents Real Time.
4. In the Select Columns page, click the expand icon in the Subject Areas area.
5. Select the columns to include in the report and click Add.
6. Click Next.
7. In the Select Views page, enter a title to display for the analysis.
8. Select the type of table or graph to include, specify the layout of the views, and click Next.
9. In the Edit Table page, you can specify more options for the table and click Next.
10. In the Edit Graph page, you can specify more options for the graph and click Next.
11. In the Sort and Filter page, you can add sorts or filters based on any of the columns you included. Click Next.
12. In the Highlights page, if you have a table, you can define conditional formatting for select columns. Click Next.
13. In the Save page, enter the name of your analysis and select a folder to save it in.
14. Click Submit.

For more information about reports and analysis, see the Human Capital Management Cloud Creating and Administering Analytics and Reports guide.
Glossary

**EHS Manager**
Abbreviation for Environment, Health, and Safety Manager. By default, this role is available with Workforce Health and Safety Incidents.