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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>
<thead>
<tr>
<th>Convention</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<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><code>&gt;</code></td>
<td>Greater than symbol separates elements in a navigation path.</td>
</tr>
</tbody>
</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.
Introduction

Overview of Workforce Health and Safety

Keep your employees safe and streamline the reporting of environmental health and safety (EHS) incidents with Oracle Fusion Workforce Health and Safety Incidents.

Let’s review what you can do in the application:

- Quickly enter incident details.
- Conduct reviews and automate follow up.
- Assign and remind incident owners of incident activities.
- Categorize incidents into different event types, such as vehicle incident or environmental spills or releases.
- Identify unsafe working conditions or unsafe acts.
- Check the progress of reported incidents using analytics.
- Use HCM Cloud Global HR data and processes.
- Secure data and functions by roles and privileges.

Here’s how the feature can help you and your organization:

- Create a safer work environment.
- Reduce risk, disruption, and costs.
- Comply with environmental, health and safety regulations.
- Help organize the reporting of incidents.
- Identify and correct shortcomings in the health and safety management programs.

Here’s what different users can do in the application:

- For employees, a simple user interface makes it easy to report an incident.
• For health and safety managers, a richer interface provides everything you need to report, manage, and resolve incidents.

### Related Topics

- Create a Health and Safety Incident Report
- Create Safety Incidents for Your Client Groups
- Create Reports and Analytics

### Safety Incident Roles

You need the Environmental Health and Safety (EHS) Manager role to use this feature. If you already have this role assigned, you can go ahead and get started. You can also use it to create new roles and assign any of the privileges from the table below. By default, the EHS Manager has the role Environment, Health and Safety Transaction Analysis Duty role with the
code FBI_ENVIRONMENT_HEALTH_AND_SAFETY_TRANSACTION_ANALYSIS_DUTY. You need this role to create reports and analytics.

As EHS Manager, you can grant these roles and privileges to other users.

<table>
<thead>
<tr>
<th>Privilege Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create Incident</td>
<td>Create an incident.</td>
</tr>
<tr>
<td>Create Incident Action</td>
<td>Create an incident action.</td>
</tr>
<tr>
<td>Create Incident Event</td>
<td>Create an incident event.</td>
</tr>
<tr>
<td>Create Incident Investigation</td>
<td>Create an incident investigation.</td>
</tr>
<tr>
<td>Create Self-Serve Incident</td>
<td>Create a self-service incident.</td>
</tr>
<tr>
<td>Delete Incident</td>
<td>Delete an incident.</td>
</tr>
<tr>
<td>Delete Incident Action</td>
<td>Delete an incident action.</td>
</tr>
<tr>
<td>Delete Incident Event</td>
<td>Delete an incident event.</td>
</tr>
<tr>
<td>Delete Incident Investigation</td>
<td>Delete an incident investigation.</td>
</tr>
<tr>
<td>Manage Configuration Settings</td>
<td>Update configuration settings.</td>
</tr>
<tr>
<td>Update Incident</td>
<td>Update an incident.</td>
</tr>
<tr>
<td>Update Incident Action</td>
<td>Update an incident action.</td>
</tr>
<tr>
<td>Update Incident Event</td>
<td>Update an incident event.</td>
</tr>
<tr>
<td>Update Incident Investigation</td>
<td>Update an incident investigation.</td>
</tr>
<tr>
<td>View Incident</td>
<td>View an incident.</td>
</tr>
<tr>
<td>Privilege Name</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------------------------------------</td>
<td>----------------------------------</td>
</tr>
<tr>
<td>View Environment Health and Safety Incident Action</td>
<td>View an incident action.</td>
</tr>
<tr>
<td>View Environment Health and Safety Incident Event</td>
<td>View an incident event.</td>
</tr>
<tr>
<td>View Environment Health and Safety Incident Investigation</td>
<td>View an incident investigation.</td>
</tr>
</tbody>
</table>
2 Setting Up Workforce Health and Safety Incidents

Overview of Implementing Workforce Health and Safety Incidents

You must have the Application Implementation Consultant role (ORA_ASM_APPLICATION_IMPLEMENTATION_CONSULTANT_JOB) to implement the application. Set up the tasks associated with Workforce Health and Safety Incidents by using Functional Setup Manager. Refer to the Oracle Applications Cloud Using Functional Setup Manager guide for more information on opting in and setting up tasks.

Use this application to report and manage work-related incidents and hazards, capture critical event information, and manage risk in the workplace. The functional area is the Workforce Health and Safety Incidents, which sits within the Workforce deployment offering. Use the Associated Features report to see a full list of functional areas and features. You get this report at the time of planning the implementation.

Related Topics
• Plan Your Implementation

Implement Workforce Health and Safety Incidents

Before you start, make sure you complete these setup tasks:
• Assign a user to the Environmental Health and Safety Manager role
• Configure target completion dates
• Configure lookup values
• Manage questionnaires
• Configure email alerts

You use the Define Environment, Health, and Safety Setup task in the Setup and Maintenance work area. If you’re already using Oracle Fusion Global Human Resources (which is required for Workforce Health and Safety Incidents), then you’re almost there.

Assign the Environmental Health and Safety Manager Role

The implementor must assign a user to the EHS manager role.

2. In the User Accounts tab, search the user that you want to assign the role.
3. Click the role to open the role details.
4. Click Edit and then Add Role.
5. In the Add Role Membership window, search Environment, Health and Safety Manager.
6. Select the role and click Add Role Membership.
7. Click **Done** and then **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 already set to sixty days from the date of the incident creation. The EHS Manager can update these values.

1. In the Setup and Maintenance work area go to:
   - Offering: Workforce Deployment
   - Functional Area: Workforce Health and Safety Incidents
   - Task: Manage Environment, Health and Safety Completion Dates

2. On the Manage Environment, Health and Safety Completion Dates page, edit the target dates.

### Configuring Lookup Types

You can modify extensible lookups and lookups that have the configuration level set to User.

1. In the Setup and Maintenance work area, go to:
   - Offering: Workforce Deployment
   - Functional Area: Workforce Health and Safety Incidents
   - Task: Manage Environment, Health and Safety Configuration Settings

2. On the Manage Environment, Health and Safety Configuration Settings page, search for the ORA_HNS lookup types. The default lookup types and their descriptions are available.

3. Update the lookup types as necessary.

### Manage Questionnaires

You can create questionnaires to gather information in applications that support them. In Workforce Health and Safety, you can use the standard investigation questionnaire or create one to meet your needs.

To edit the questionnaire:

1. In the Setup and Maintenance work area, go to:
   - Offering: Workforce Deployment
   - Functional Area: Workforce Health and Safety Incidents
   - Task: Manage Questionnaire Template

2. Search for Workforce Health and Safety Incidents in the Subscriber list to view the available templates.

3. Select to edit the **Workforce Health and Safety Standard Investigation**.

4. Update the basic information, provide instructions and help materials, add attachments, and click **Next**.

5. Click **Next** and review changes.

To create a questionnaire:

1. In the Setup and Maintenance work area, go to:
   - Offering: Workforce Deployment
   - Functional area: Workforce Health and Safety Incidents
   - Task: Manage Questionnaire Template
2. In the Search Results section of the Manage Questionnaires page, click Create.
3. Enter Questionnaire Template ID or Name values, if available. Or click Search to see all the available templates.
4. Select a template in the Search Results section 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. For the Privacy field, you have a choice. You can set it to Public, which means anyone who can access the questionnaire can edit it. Or you can set it to Privacy to make the questionnaire private.
9. In the Subscriber field, select Workforce Health and Safety Incidents. Other applications can’t use the questionnaire if you select a subscriber.
10. Leave the Status value set to Draft until the questionnaire is ready.
11. 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.
12. Add file or URL attachments, if appropriate. Links appear at the top of the questionnaire and beneath any instruction text.
13. Click Next. The Create Questionnaire Contents page opens.
14. 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.
15. 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.
16. When all sections and questions are complete, click Next to open the Create Questionnaire Review page.
17. Preview and save your questionnaire.
18. Set the questionnaire Status value to Active when the questionnaire is ready for use.

### Configure Email Alerts

You can use the Alerts Composer to send emails or notifications triggered by an event.

Alerts you can use with 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>Sends an email when an employee is assigned any of these roles:</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>Sends an email when an employee is removed from any of these roles:</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>Sends an email to thank an employee for reporting the incident.</td>
</tr>
</tbody>
</table>
To turn the email alerts on:

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.

Related Topics

- How can I edit lookups
3 Creating Safety Incidents

Create a Health and Safety Incident Report

If you’re not able to see Safety Incidents in your work area, contact your EHS Manager.

1. Click Navigator > Safety Incidents.
2. Optionally, you can select one of more event types to describe different types of incidents, such as injury or illness, vehicle incident and so on.
3. Click Next.
4. On the Create Incident Report: Reporter page, enter the reporter details, date and time of the incident, and the incident location details.
5. Click Next.
6. On the Create Incident Report: Summary page, enter the incident summary, description, and the immediate actions required.
7. Click Submit.

Your incident is now on its way to the EHS Manager for resolution.

Create Safety Incidents for Your Client Groups

To create a safety incident, select My Client Groups > Safety Incidents. When you create an incident, it’s routed to the EHS Manager for resolution. Your EHS Manager then assigns an incident owner for you who manages and solves the incident. You can capture details such as, incident details, investigations, attachments, and so on.

Enter Incident Details

The Incident Details page lets you record details about your incident, such as date and time, related incidents, incident owner, and so on. The incident owner is responsible for acknowledging the completion of an incident report.

1. Select the Incident Reporter option that’s appropriate for you in the Incident Details infotile.
2. Enter the date and time of the incident.
3. Update the location details in the Incident Location area.
4. Enter the summary of the incident.
5. If you know the agencies that were notified of the incident, select them in the Agencies and Related Incidents Area. You can also select a related incident for reference if you have a role in that related incident.
6. Assign an incident owner and update the target completion date in the Incident Signoff area.
7. Optionally, you could assign incident reviewers and approvers.
8. Click Save.

Create Incident Events

You can record lots of information about the following event types.

- Injury or Illness
• Vehicle Incident
• Near Miss
• Unsafe Condition
• Property Damage
• Spill or Release
• Notice of Violation
• Air Quality
• Ergonomic
• Fire or Explosion
• Suggestion for Improvement
• Unsafe Act
• Issue

You can go ahead and create multiple incident events at the time of reporting or managing the incident.

1. Click the Incident Events infotile.
2. Now 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. Reassign Incident Event Owners and update the target completion date.
5. Click **Save**.

Create Investigations
With the Safety Incidents Professional UI, create and manage investigations to determine the root cause of incidents. The investigator can gather and analyze your data, note investigation findings, and recommend actions to prevent such incidents. You can create multiple investigations.

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

Create Actions
Create one or more actions to find the cause of the incident, discover near misses, or rectify any unsafe conditions.

1. In the **Actions** infotile, click the **Add** icon.
2. In the **Create Action** page, update the date and time.
3. Enter the action summary and description.
4. Select the action type.
5. Select the action priority.
6. In the **Incident Action Sign Off** section, update the incident action owners and the target completion dates.
7. Optionally, you can assign incident action approvers and reviewers.
8. Click **Save**.

### Add Attachments

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

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 updates with the file name.
5. You can enter a description of the file.
6. Click **Save**.

You created an incident 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

How You Close Incidents

Here are a few things to keep in mind when you’re closing an incident. Find the incident you want to close and check the status in the Safety Incidents dashboard. Remember you can close an incident even if it has open actions.

To close an incident, everyone involved in the incident must select the completed check box on these pages.

<table>
<thead>
<tr>
<th>Pages</th>
<th>Roles</th>
</tr>
</thead>
<tbody>
<tr>
<td>Incident Events</td>
<td>Incident Event Owners</td>
</tr>
<tr>
<td>Investigations</td>
<td>Incident Investigation Reviewers, Incident Investigation Approvers, Incident Investigation Owners</td>
</tr>
<tr>
<td>Incident Details</td>
<td>Incident Reviewers, Incident Approvers, Incident Owners</td>
</tr>
</tbody>
</table>

FAQs for Managing Incidents

Why can't I link a related incident?

If you don't see the related incident you're looking for, then you may not have an assigned role in the related incident. You can link an incident only if you have an assigned role in the related incident as the incident owner, reviewer, or approver. The linked related incident is available to you in read-only mode.

How can I close an incident event?

All incident event owners must select the Completed check box on the Incident Events page. You and the other incident event owners can view this in read-only mode after closing the incident event.

How can I close an incident action?

You must select Completed, Reviewed or Approved in the Actions tab, depending on what's applicable to you as an incident action owner, reviewer or approver. Keep in mind that only an incident owner can reopen a closed action.
How can I delete an incident?

Only an Environmental Health and Safety Manager can delete an incident. To delete an incident, log in to the Safety Incident work area, search for the incident you want to delete, and click the Delete icon.

How can I reopen an incident?

Only an Environmental Health and Safety Manager can reopen a closed incident. On the Incident Details page, Incident Sign Off section make sure that the Completed check box is unchecked.
5 Analytics and Reports

Create Reports and Analytics

Use the Oracle Business Intelligence Publisher to author, generate, and deliver reports and analysis for Workforce Health and Safety Incidents. You must have the FBI_ENVIRONMENT_HEALTH_AND_SAFETY_TRANSACTION_ANALYSIS_DUTY role to do this task. The EHS Manager already has the privileges assigned, so you can get started.

1. Click Navigator > Tools > Reports and Analytics.
2. On the Reports and Analytics page, click Create > Report.
3. In the Create Report dialog box, select the Use Subject Area box, and then select Environment Health and Safety - Incidents Real Time from the Subject Areas drop down.
4. Click Next.
5. On the Select Columns page, click the expand icon in the Subject Areas drop down.
6. Click Continue.
7. Select the columns to include in the report and click Add.
8. Click Next.
9. On the Select Views page, enter a title to display for the analysis.
10. Select the type of table or graph to include. In the Layout option, specify the layout of the views, and click Next.
11. On the Edit Table page, you can specify more options for the table and click Next.
12. On the Edit Graph page, you can specify more options for the graph and click Next.
13. On the Sort and Filter page, you can add sorts or filters based on any of the columns you included. Click Next.
14. On the Highlights page, if you have a table, you can define conditional formatting for select columns. Click Next.
15. On the Save page, enter the name of your analysis and select a folder to save it in.
16. 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 Environmental Health and Safety Manager. By default, this role is available with Workforce Health and Safety Incidents.