Global Human Resources Cloud

Using Workforce Health and Safety Incidents

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1 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.

- Conduct health surveys for employees.

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 or complete a health survey.

- For health and safety managers, a richer interface provides everything you need to report, manage, and resolve incidents.
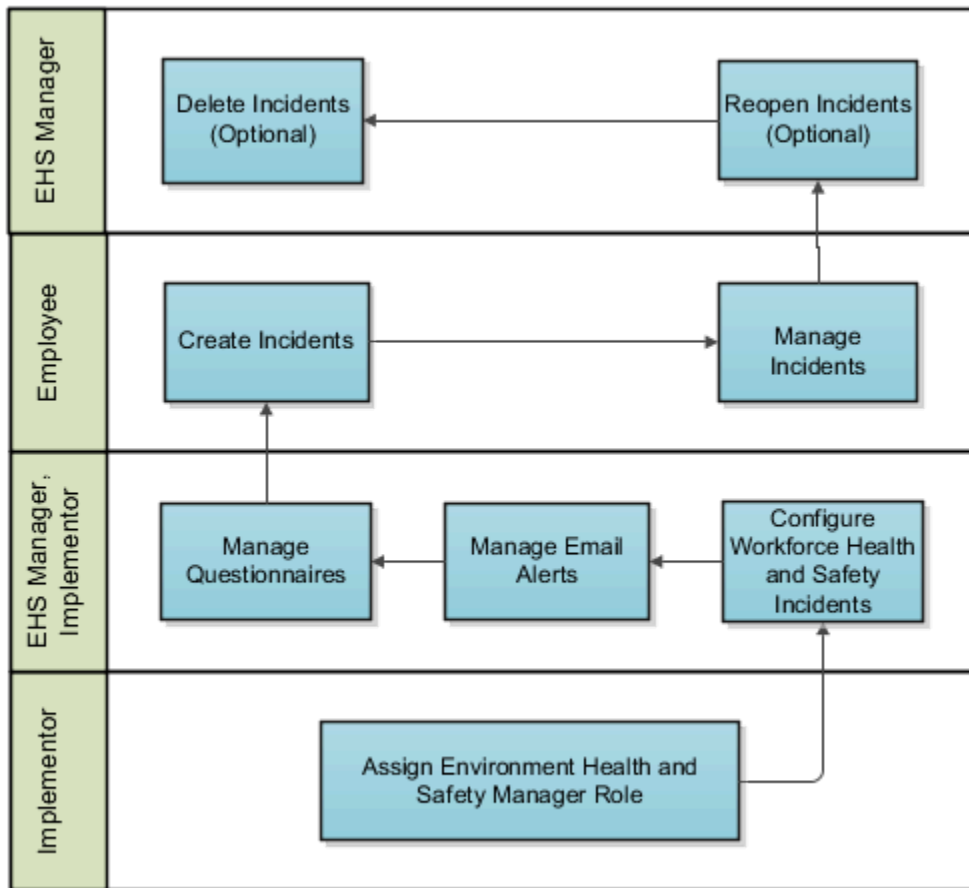
Related Topics
- Safety Incident Roles
- Create a Health and Safety Incident Report
- Manage Safety Incidents
- Create Reports and Analytics

Safety Incident Roles

You need the Environmental Health and Safety (EHS) Manager role to use the product features and to create new roles and assign them privileges.

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

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Privilege Name	Description
Create Environment Health and Safety Incident	Create an incident.
Review Environment Health and Safety Incident	Update an incident and related aspects.
Create Environment Health and Safety Incident Action	Create an incident action.
Create Environment Health and Safety Incident Event	Create an incident event.
Create Environment Health and Safety Incident Investigation	Create an incident investigation.
Create Self-Serve Environment Health and Safety Incident	Create a self-service incident.
Delete Environment Health and Safety Incident	Delete an incident.
Delete Environment Health and Safety Incident Action	Delete an incident action.
Delete Environment Health and Safety Incident Event	Delete an incident event.
Delete Environment Health and Safety Incident Investigation	Delete an incident investigation.
Manage Environment Health and Safety Configuration Settings	Update configuration settings.
Update Environment Health and Safety Incident	Update an incident.
Update Environment Health and Safety Incident Action	Update an incident action.
Update Environment Health and Safety Incident Event	Update an incident event.
Update Environment Health and Safety Incident Investigation	Update an incident investigation.
View Environment Health and Safety Incident	View an incident.

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Privilege Name	Description
View Environment Health and Safety Incident Action	View an incident action.
View Environment Health and Safety Incident Event	View an incident event.
View Environment Health and Safety Incident Investigation	View an incident investigation.
Access Assignment Rules Management Page	Access the Assignment Rules page.
Create Health and Safety Assignment Rules	Create assignment rules for health and safety incidents.
Edit Health and Safety Assignment Rules	Update assignment rules for health and safety incidents.
Delete Health and Safety Assignment Rules	Delete assignment rules for health and safety incidents.
Access Health and Safety Assignment Rules	Access assignment rules for health and safety incidents.
Edit Health and Safety Assignment Rules Processing Order	Edit processing order of assignment rules for health and safety incidents.
View Health and Safety Assignment Rules	View assignment rules for health and safety incidents.

Note: Users need to have the HRQ_REST_SERVICE_ACCESS_QUESTIONNAIRES_PRIV privilege to create a health survey incident using the employee self-service page.

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2 Set 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.

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

You need to complete various setup tasks as a part of the implementation.

Setup Tasks

- Assign the Environmental Health and Safety Manager role to the relevant user
- Configure target completion dates for an incident
- Configure lookup values in Workforce Health and Safety
- Configure profile options in Workforce Health and Safety
- Manage questionnaires for incident investigation
- Configure email alerts incident events

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 Environmental Health and Safety Manager Role

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

1. Open the Security Console by clicking Navigator > Tools > Security Console.
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**.

Optionally, you can designate one or more people as safety coordinators for incidents. A person who is assigned the safety coordinator role has full access to all incident aspects including the event, investigation, and actions. To act as a safety coordinator, the person must have the HNS_REVIEW_ENVIRONMENT_HEALTH_AND_SAFETY_INCIDENT_PRIV privilege assigned to them. There's no limit on the number of safety coordinators that can be assigned to an incident.

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 as required.

Configuring Lookup Types

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

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.

You can enable and disable events on the Safety Incidents > Report an Incident page using the corresponding lookup values. You can enable and disable events separately for employees and professional users. You can order the events so that they appear in a set order on the Safety Incidents page for employees and the events list page for professional users. Here's how you do it:

1. In the Setup and Maintenance work area, select Tasks in the right pane. Search for and select the Manage Environment, Health and Safety Incident Events task.
2. On the Manage Incident Events Lookup page, you can see all events listed as lookup values. Select the events you want to enable for employees and professional users.

3. In the Order column, specify the order in which the events should appear for employees and professional users. Note that the Health Survey option is always on top. Safety and cybersecurity events are separately ordered.

Employees and professional users will be able to see only those events you enable when they access the Report an Incident page.

Configuring Profile Options

You can use these profile options to control how the application operates. To change any profile option value, search for and select the Manage Administrator Profile Values task. In the Application field, select Workforce Health and Safety Incidents and search for the relevant profile option.

Profile Option Name	Description	Profile Value
ORA_HNS_ALLOW_ACCESS_BY_INCIDENT_ REPORTER_AND_LOGGEDIN_USER	Enables the incident reporter and the logged in user to access incidents they reported.	Y **Note:** The profile value is set to N by default.
HNS_KIOSK_SHOW_EVENTS	Enables employees to view the Report an Incident page where they can select the type of event and report an incident.	Y **Note:** The profile value is set to Y by default.
HNS_EXPERT_RESPONSIVE_ENABLED	Enables the mobile-responsive of Environment, Health and Safety Incidents Professional pages.	Y **Note:** The profile value is set to N by default.
HNS_KIOSK_RESPONSIVE_ENABLED	Enables the mobile-responsive of Environment, Health and Safety Incidents Self-Service pages.	Y **Note:** The profile value is set to N by default.

Configure Email Alerts

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

The following table describes the alerts you can use with Workforce Health and Safety Incidents:

Alert Name	Description
HNS_Worker_Notification_Appointed	Sends an email when an employee is assigned any of these roles: • Incident Owner, Reviewer, or Approver • Incident Event Owner • Incident Investigation Owner, Reviewer, or Approver • Incident Action Owner, Reviewer, or Approver
HNS_Worker_Notification_Removed	Sends an email when an employee is removed from any of these roles:

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Alert Name	Description
	• Incident Owner, Reviewer, or Approver
	• Incident Event Owner
	• Incident Investigation Owner, Reviewer, or Approver
	• Incident Action Owner, Reviewer, or Approver
HNS_Worker_Notification_Report_Incident	Sends an email to thank an employee for reporting the incident.

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**.

Manage Questionnaires

The incident investigations use questionnaires to assist investigators during their investigation. It helps the organization ensure consistency and quality of the investigations. Questionnaires also provide flexibility and fit as the investigator can select from a list of questionnaires defined and configured by your administrator.

Workforce Health and Safety is a subscriber of Questionnaires. Cybersecurity is another subscriber. As an administrator, you can define and manage your set of questions, questionnaires, questionnaire templates in the Setup and Maintenance work area Workforce Development offering. You can search for these tasks and use them to define and manage your questionnaires.

1. Questionnaire Lookups
2. Questionnaire Templates
3. Questionnaires
4. Question Library

To start with, you can find a questionnaire template, Workforce Health and Safety Standard Investigation under the Workforce Health and Safety subscriber. You can make use of it and create your questionnaire.

1. In the Setup and Maintenance work area, go to:
   - Offering: Workforce Development
   - Task: Questionnaires

2. In the **Questionnaires** page, search for **Workforce Health and Safety** subscriber. You can see a Questionnaire Library folder and a Health Surveys subfolder. Use the former to create questionnaires related to safety incidents investigation and latter to create health survey questionnaires. Create the questions within the questionnaire also in the relevant folder. You can also search for and select the Cybersecurity subscriber to manage questionnaires in this area.
3. Click **Create**.
4. You need to select a questionnaire template to create a questionnaire. Search for and select **Workforce Health and Safety Standard Investigation** questionnaire template. This Health and Safety template is provided for you to start with. You administrator can create more templates that are specific to your organization.
5. Modify the **Basic Information** and **Contents** of the questionnaire as per your needs.

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6. Review the questionnaire and click **Save and Close**.

Related Topics

- How can I edit lookups?
- Questionnaires
- How You Create Questions

How You Create a Questionnaire

This topic explains how to create a questionnaire by selecting a questionnaire template and specifying relevant information in the questionnaire. It also lists the points to consider while editing a questionnaire.

Select the Questionnaire Template

In the Setup and Maintenance work area, select these options:

- Setup: **Workforce Development**
- Functional Area: **Questionnaires**
- Task: **Questionnaires**

If you use Performance Management, you can also go to **My Client Groups** > **Performance** > **Questionnaires**.

1. In the **Folders** section of the Questionnaires page, select the subscriber application for the questionnaire, for example Performance 360, Recruiting, or Learning Assessments.
2. In the **Search Results** section, click **Create**.
3. Enter **Questionnaire Template ID** or **Name** values, if available. Alternatively, click **Search** to list all available templates.
4. In the **Search Results** section, select a template and click **OK**.

Enter Questionnaire Basic Information

1. A unique numeric questionnaire ID appears automatically. You can change this value.
2. If this is a scored questionnaire, an overall score calculation rule appears. You can select a different rule.
3. Enter a **Name** and select a **Folder**. Use folders to organize questionnaires by type or purpose.
4. 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**.
5. Leave the **Status** value set to **Draft** until the questionnaire is ready.
6. For the Touchpoints and Journey Surveys subscribers, select a pagination option from the **Display Format** list.

   Note: When you display one section per page, section instructions, if any, appear below the section title. When you display all questions on a single page, questionnaire instructions and section instructions appear below the respective titles.

7. 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.
8. Add file or URL attachments, if appropriate. Links appear at the top of the questionnaire and beneath any instruction text.
9. Click **Next**.

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Enter Questionnaire Contents

The **Section Order** and **Section Presentation** values are as specified in the questionnaire template, for example, **Sequential** as the **Section Order** and **Stack Regions** as the **Section Presentation**. Depending on template settings, you may be able to change these values. Depending on template settings, you can edit some or all section settings. You can also delete predefined sections and create additional sections.

1. 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.
2. If you create additional sections, you add questions to them. In the **Questions** section, click **Add**. Search for a question, select it, and click **OK**. The question is added below the question that appears highlighted in the Questions section. You can reorder the questions by dragging them by the expandable arrow that appears in the first column and dropping them in another row.

   Note: You can view the version number of the question in the Search Results section. If this column doesn't appear, click the **View** menu and select **Columns** > **Question Version Number**.

3. You can also create questions for a section. Select a section, and in the **Questions** section, click **Create**.
4. Select the **Folder**, and enter question and response details, and click **Save and Close**. The question becomes available in the question library as well. Add the question to the section using the instruction in step 2.
5. Edit questions as required. Select a question and click **Edit**. Enter question and response details, and click **Save and Close**. The question is updated in the questionnaire and the question library.

   Note: Although you can override the response types for questions while defining a questionnaire, you can't change the response type to text for questions that accept date responses or change the response type to date for questions that accept text responses.

6. When all sections and questions are complete, click **Next**.
7. Click **Preview** to preview the questionnaire. For scored questionnaires, click **Test** to verify the scoring.

   Note:
   - When you click **Reset** after testing, the previously filled responses are retained in the questionnaire. This allows you to modify specific responses as per your needs and test the behaviour of the questionnaire again.
   - The questions in a section are displayed in the order specified in the **Section Order** field.
   - Questionnaire surveys that are created for both Touchpoints and Journey Surveys subscribers are distributed to respondents using the Journeys application. So, when you preview the questionnaire survey in ADF-based pages, the response options appear in a drop-down list. However, when you view the survey in the Journeys application, you can see the horizontal button responses and the question display format that you've chosen.

8. Click **OK** and then click **Save**.

Note: If a questionnaire isn't in use, you can still add new questions that accept date response types, or create a new version of the questionnaire to add such questions. When you edit the response type for a question in a questionnaire that isn't in use, the updated response type is reflected in the questionnaire definition.

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Editing a Questionnaire

To edit a questionnaire, go to the Questionnaires setup page, and select a questionnaire from the Search Results section and click **Edit**.

A few points about editing a questionnaire:

Set the questionnaire **Status** value to **Active** when the questionnaire is ready for use.

If a questionnaire isn't in use, you can still add new questions that accept date response types, or create a new version of the questionnaire to add such questions. When you edit the response type for a question in a questionnaire that isn't in use, the updated response type is reflected in the questionnaire definition.

You no longer need to go into the edit mode to preview a questionnaire. You can preview it from the Search Results section of the Questionnaires setup page. You can preview draft, active, and inactive questionnaires.

Related Topics
- What happens if I edit a questionnaire that's in use?

Descriptive Flexfields for Health and Safety

You can add descriptive flexfields for your organization and define validation and display properties for health and safety entities.

Define Descriptive Flexfields Segments

Use the **Manage Descriptive Flexfields** task in the **Setup and Maintenance** work area to define a segment for a descriptive flexfield for the **Workforce Health and Safety Incidents** module. You can add descriptive flexfields for these entities:

- Incidents details
- Events
- Investigations
- Actions
- Risk assessments

This table describes the descriptive flexfields available by default in Health and Safety.

DFF Name	DFF Code	Description
Descriptive Flexfields for Incidents	HNS_INCIDENTS_DFF	Fields for incident information on the Report an Incident page for professional user and employee.
DFF for Air Quality Events	HNS_AIR_QUALITY_EVENTS_DFF	Fields for air quality information on the Air Quality Event Details page of the incident.

DFF Name	DFF Code	Description
DFF for Driver and Vehicle Incident Events	HNS_DRIVER_AND_VEHICLE_EVENTS_DFF	Fields for driver and vehicle information on the driver and Vehicle Incident Event Detail page of the incident.
DFF for Ergonomic Events	HNS_ERGONOMIC_EVENTS_DFF	Fields for ergonomic information on the Ergonomic Event Details page of the incident.
DFF for Fire or Explosion Events	HNS_FIRE_OR_EXPLOSION_EVENTS_DFF	Fields for fire or explosion information on the Fire or Explosion Event Details page of the incident.
DFF for Injured Person Summary Events	HNS_INJURED_OR_ILL_PERSON_EVENTS_DFF	Fields for injured or ill person information on the Illness or Injury Event Details page of the incident.
DFF for Issue Events	HNS_INJURED_PERSON_SUMMARY_EVENTS_DFF	Fields for injured or ill person information on the Illness or Injury Event Summary page.
DFF for Injured or Ill Person Events	HNS_ISSUE_EVENTS_DFF	Fields for issue information on the Issue Event Details page of the incident.
DFF for Near Miss Events	HNS_NEAR_MISS_EVENTS_DFF	Fields for near miss information on the Near Miss Event page.
DFF for Notice of Violation Events	HNS_NOTICE_OF_VIOLATION_EVENTS_DFF	Fields for notice of violation information on the Notice of Violation Event page.
DFF for Property Damage Events	HNS_PROPERTY_DAMAGE_EVENTS_DFF	Fields for property damage information on the Property Damage Event page.
DFF for Spill or Release Events	HNS_SPILL_OR_RELEASE_EVENTS_DFF	Fields for spill or release information on the Spill or Release Event page.
DFF for Suggestion for Improvement Events	HNS_SUGG_FOR_IMPROV_EVENTS_DFF	Fields for suggestion for improvement information on the suggestion for the Improvement Event page.
DFF for Unsafe Act Events	HNS_UNSAFE_ACT_EVENTS_DFF	Fields for unsafe act information on the Unsafe Act Event page.
DFF for Unsafe Condition Events	HNS_UNSAFE_CONDITION_EVENTS_DFF	Fields for unsafe condition information on the Unsafe Condition Event page.
DFF for Vehicle Events	HNS_VEHICLE_INCIDENT_EVENTS_DFF	Fields for vehicle incident summary information on the Vehicle Incident Event Summary page.
Descriptive Flexfields for Investigations	HNS_INVESTIGATIONS_DFF	Fields for investigation information on the Investigation Details page of the incident.

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DFF Name	DFF Code	Description
Descriptive Flexfields for Actions	HNS_ACTIONS_DFF	Fields to track action information on the Action Details page of an incident.
Descriptive Flexfields for Risk Assessments	HNS_RISK_ASSESSMENTS_DFF	Fields to track risk assessment of an incident in the Risk Assessment section on the Safety Incident page.

These are the descriptive flexfields for Security Incidents:

DFF Name	DFF Code	Description
DFF for Lost or Stolen Device Events	HNS_LOST_OR_STOLEN_DEVICES_DFF	Fields for lost or stolen device information on the Lost or Stolen Device Event page.
DFF for Other CyberSecurity Issue Events	HNS_OTHER_DATA_SECURITY_ISSUES_DFF	Fields for other cybersecurity issue information on the Other Cybersecurity Issue Event page.
DFF for Suspicious Email or Call Events	HNS_SUSPICIOUS_EMAIL_OR_CALLS_DFF	Fields for suspicious email or call information on the Suspicious Email or Call Event page.
DFF for Unauthorized System Access Events	HNS_UNAUTHD_SYSTEM_ACCESSES_DFF	Fields for unauthorized application access information on the Unauthorized System Access Event page.

Deploy Descriptive Flexfields

Remember to deploy the changed or configured flexfield to ensure that the latest definition is available to users.

Note: The DFF that is available in the professional user page appears in the employee self-service too. The DFF attributes are located before the **Lessons Learned** field of the Incident page.

Related Topics
- Overview of Descriptive Flexfields
- Considerations for Planning Descriptive Flexfields
- Considerations for Managing Descriptive Flexfields
- Overview of Flexfield Deployment

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Global Human Resources Cloud
Using Workforce Health and Safety Incidents

Chapter 3
Create Safety Incidents

3 Create Safety Incidents

Create a Health and Safety Incident Report

Employees can report an incident in Workforce Health and Safety by navigating from Home>Me>Safety Incidents. If you can't find the Safety Incidents app, contact your EHS Manager to make the app available for you.

1. Click **Safety Incidents** to open the **Report an Incident** page. Various event tiles appear in a page. You may want to select one or more event types when reporting the incident.

2. Select one or more Event Type check boxes, for example, Ergonomic, Air Quality, and so on. After submitting the incident, the application creates the relevant events for the incident.

   Note: This event tiles page is displayed based on the **Employee Self-Service Events** (HNS_KIOSK_SHOW_EVENTS) profile option and **Manage Incident Events Lookup** page settings. By default, the option is enabled. If your administrator has decided not to show the events page, then you won't see the event tiles page in employee self-service. You can also see the Health Survey option on the page if your administrator has enabled it. Select this option only if you want to take a health survey.

3. Click **Continue**.

4. On the **Report an Incident** page, **Incident Details** region, specify details in **What's the incident?** incident **Description**, and **Actions already taken**.

5. Select **Level of Security**. Specify where the incident occurred and other details.

6. Click **Continue**.

   Note: The **Incident Details**, **Who's reporting this Incident?**, **Attachments** regions open sequentially.

7. In the **Who's reporting This Incident?** region, your details appear for **Incident Reporter** type, reporter name. You can change the details if the default values aren't correct.

8. Select the name of the person in the **Who was notified?** field.

9. Select the notified person name, notifications date and time in the **Who was notified?** and **Notification Time** fields.

   Note: For events of type Virus, Illness or Injury, you can enable the **Notified Human Resources** check box and specify a date and time for notifying HR. This causes a notification to be sent to the Human Resources (HR) representative of the injured person. The HR representative is identified based on areas of responsibility. Human Resource (HR) Specialists assign responsibilities to workers (such as HR Representative, Benefits Representative) using the Manage Areas of Responsibility task. If the injured person doesn't already have a HR representative, they must be assigned one using this task.

10. Click **Continue** to go to the **Attachments** region.

    Tip: Click the Edit icon to go back to any region and modify the details, if required.

11. Add any relevant attachments for the incident.

12. Click **Submit**.

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

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Related Topics

- How You Assign Areas of Responsibility

Complete a Health Survey

In this example, you take a health survey to provide information about your current state of health. The health survey is created and made available to you by your administrator.

> **Note:** There are no predefined health surveys in the application, the administrator needs to set them up.

1. Click **Safety Incidents** to open the **Report an Incident** page.
2. Select **Health Survey** and click **Continue**.
3. On the **Health Survey Details** page, complete the fields as shown in this table.

Field	Value
What type of survey responder are you?	Employee
Survey Responder Name	Pat Williams
Survey Date and Time	3/1/21 2:30 PM
Survey Location	California

4. A questionnaire is shown based on the survey details you entered. Enter your responses to the questions and click Submit. Note that you have to enter responses for all the required questions.

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4 Manage Safety Incidents

Professional User's Incidents Work Area

As a professional user, you can manage the incidents in the Incidents work area by navigating to Home My Client Groups Safety Incidents . You can search for incidents, modify, and report incidents.

You can search for incidents by:

- Incident name or number

- Filters such as:

    o Target completion date

    o Level of severity

    o Event type

    o Location

    o Status

    o When incident was reported

- Saved Searches: Use the available saved searches or personalize your search by saving your search for yourself or others. Click the gear wheel to select the search criteria.

Find the list of incidents on the page sorted by default in this order:

- Incidents with no owner; sort by earliest target completion first

- Earliest target completion date of the incident

- Incident with an owner; sorted by earliest completion date first

Use the **Sort By** list to order the incidents list by these options:

- Incident Number (from highest to lowest)

- Incident Reported Date (from newest to oldest)

- Target Completion Date of Incident (from oldest to newest)

- Severity Levels of Incident, (from highest to lowest)

- Relevance (default sorting pattern that's mentioned earlier)

Each incident in the list appears with key information such as incident name, number, date and time the incident took place, notification time, name of the incident owner, target completion date, and completion status.

See the number of events, investigations, and actions that display for the incident. You can review and update the details directly in the page. Additionally, you can use the incident name link to open the incident page and then go to the specific details of the incident. Apart from searching for incidents, you can create incidents and manage them too. Only the EHS manager can review, modify, and delete incidents.

> **Note:** Your access to incidents is based on the security privileges and active assignments in the incident.

How Incident Records are Secured

The application secures incident records using the standard data security framework.

A user can access an incident record only when both these conditions are met:

- The user has the requisite environment health and safety privileges.

- The user has access to the specific incident record.

Access to Incidents

The EHS manager assigns a user as the incident owner for any incidents created by employees in employee self-service. When a professional user creates an incident, they can assign users to the incident by virtue of being the logged-in user. Users receive emails when assigned to or removed from an assignment on an incident. This security approach ensures that a user with an employee custom role having the relevant HNS privileges only can access incidents assigned to the user.

Action Management

An action owner, preapprover, approver, or reviewer can't access the incident details, event, or investigation pages. They can only access the action record they are assigned to, if they have the requisite privilege.

Manage Safety Incidents

When employees report incidents, they're accessible to the EHS Manager for resolution.

The EHS Manager assigns an incident owner for an incident, who manages and solves the incident. If you're using the Journeys application, you can report a safety incident from within a journey.

In managing the incident, the incident owner captures additional details in the **Incident Details**, **Events**, **Investigations**, **Actions**, and **Attachments** for the incident. Let's see the various aspects of an incident and how you can use them and track the details. The Incident page has these tabs in the left pane. Click these tabs to open the respective pages.

- **Details** tab: The Incident page with the incident number as the page header starts with **Incident Details** region followed by **Location**, **Risk Assessment**, **Agencies Notified**, **Related Incidents**, **Notes**, **Stakeholders**, **Incident Reviewers**, **Incident Approvers**, and **Incident Owner** regions.

- **Events** tab: The **Events** page includes incidents if any events are already added. You may want to add any relevant events to the incident. Click the **Add** button on the Events page and select the event type to create an event. You can have only one event for an event type.

- **Investigations** tab: The **Investigation** page starts with **Investigation Details** region followed by the **Investigation Questionnaire**, **Findings**, **Overall Findings**, **Notes**, **Stakeholders**, **Investigation Preapprovers**, **Investigation Reviewers**, **Investigation Approvers**, and **Investigation Owners** regions.

- **Actions** tab: The **Actions** page starts with the **Action Details** region followed by the **Notes**, **Stakeholders**, **Action Preapprovers**, **Action Reviewers**, **Action Approvers**, and **Action Owners** regions.

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- **Attachments** tab: You can add attachments and links relevant to the incident on the **Attachments** page.

> **Note:** For events of type Health Survey, you can see an additional section named Questions. You can see the questionnaire that the employee has completed as a part of taking the health survey. The questionnaire is displayed in read-only mode.

Integration with Journeys

As a Human Resources (HR) Specialist, these are the two ways in which you can configure safety incidents within journeys:

- You can include a safety incident related task in the journey (by selecting the task type as Application Task and the value as Safety Incident). For example, you can create a Safe Travels journey and include a safety incident related task Report a safety concern. An employee who's assigned the Safe Travels journey can report a safety incident from within the journey itself. The task includes a button Go to application task which takes the user directly to the incident creation page.

- You can trigger a journey automatically when a safety incident is created with a specific event type. For example, when an employee reports an incident of the type virus, injury or illness, you may want to assign a journey to the incident reporter to complete these tasks: Create Absence, Inform Payroll, Submit Insurance Claim. You can do this by configuring a Health and Safety- Incident event in the journey and selecting the specific event type Virus, Illness and Injury. Note that you need to set the initiator as the performer for all the tasks. The journey won't be triggered if the initiator is a nonemployee.

Risk Assessment of Safety Incidents

You can do a risk assessment of an incident by accessing the incident from Home > My Client Groups > Safety Incidents.

Risk Assessment Parameters

You can add a risk assessment for an incident and select what's the consequence of the incident and what's the likelihood of the incident happening. The consequence indicates what impact the incident has on the organization, for example, insignificant, moderate, or catastrophic. The likelihood indicates what's the possibility of the incident occurring, for example, remote, frequent, or repeated. Based on the consequence and the likelihood values you select, the risk score is automatically calculated and displayed along with a description of what the score means. You can enter a date for the risk assessment and also add multiple risk assessments as of different dates.

Risk Assessment Setup

You can change the values displayed in the Consequence and Likelihood fields, and also change the risk score calculation. You can update the consequence, likelihood, and risk score values and their descriptions using the **Manage Environment, Health, and Safety Risk Assessment** task in the **Setup and Maintenance** work area. In the Consequence and Likelihood sections, you can change the existing name, value, and description. The risk score is calculated by multiplying the consequence and likelihood values. You can change the risk score range and the name and description for risk scores falling in that range.

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Enter Incident Details

The incident Details page lets you record details about your incident, location, notified agencies, related incidents, notes, stakeholders, incident reviewers, approvers, and owner. The incident owner is responsible for acknowledging the completion of an incident report.

1. In the Incident Details region, specify the information for these attributes:

   a. Summary and Description of the incident
   b. Date and Time
   c. Level of Security
   d. Immediate Actions
   e. Lessons Learned
   f. Incident Reporter person type and name
   g. Person who was notified and the notified time

2. Click **Save and Close**.
3. In the **Incident Location** region, update the location details, if required. Select the Conditions check boxes and specify the related details.
4. Click **Save**.
5. In the **Risk Assessment** region, add a risk assessment and select the consequence and likelihood values. Note that the risk score is automatically calculated and displayed.
6. If you know the agencies that were notified of the incident, select them in the **Agencies** region.
7. In the **Related Incidents** region, click **Add** to include the related incidents.

   a. After the **Incidents** work area opens, search for and select the related incidents for reference, if you have a role in that related incident.
   b. Click **Save and Close**. The selected incidents appear in the **Related Incidents** region of this incident.

8. Track notes for the incident in the **Notes** region. Click **Add**.

   a. Enter note text for the event.
   b. Click **Save**. The note is saved and is displayed in the **Notes** region with name of the person who created the note and the date when it was created.

9. Assign incident stakeholders, reviewers, and approvers in the respective region of the incident page and specify related details.
10. Assign an incident owner and update the target completion date. When the incident is complete, you can update the status and mark it complete.

Event Types for Incidents

You have a number of event types based on which you can add events to your incident.

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You specify the Event Details, Notes, Stakeholders, and Event Owner details in the respective regions of the Event page. This apart, you can specify event-specific attributes. Let's see the event-specific attributes and regions that can be tracked for an event.

Event Type	Event-Specific Regions and Attributes	Description
Improvement Type	Event Details region>Improvement Type: Communication Environmental Mechanical	Select a value from the **Improvement Type** list.
Air Quality	Event Details region>Air Quality Type: • Values: Fumes, Mold, Odor, Smoke, Other • Employee Name	Select a value from the Air Quality Type list. Select the employee who was directly impacted by the air quality.
Ergonomic	Event Details region > Ergonomic Type • Ambient Temperature • Contact Stress • Posture • Repetitive Task • Use of Excessive Force • Vibration **Request an ergonomic assessment** check box Employee Name	Select a value from the Ergonomic Type list. Select the request for an ergonomic assessment to ensure employee's correct posture and reduce the exposure to physical hazards. Select the name of the employee.
Fire or Explosion	Select the one or more relevant check box options: • Fire • Explosion • Replenish Fire Fighting Equipment	Based on the option you select, specify the relevant details for the attributes in the regions.
Virus, Illness, or Injury	Event details include **Notified Human Resources** check box	When you select the option, specify the date and time of notifying HR. This indicates that the HR department is notified about the incident.
Virus, Illness, or Injury	**Injured or Ill Person Details** region attributes: • Person Type • Name • Event date and time • Name of the person who was informed including the date and time • Person activity before the incident	Specify the Person Type and Name of the injured or ill person. Describe the activity of the injured or ill person before the incident. If the person has lost time, provide an estimate of lost hours. If the person is absent from work for 1 or more days, mention the details. If the person returns to work, specify the Return to Work attributes such as date, job transfer or restrictions, if any. You can add information

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Event Type	Event-Specific Regions and Attributes	Description
	• Source • Mechanism • Classification • Injured Body Part and Injury Type • Treatments • Lost Time and Return to Work	for multiple treatments and multiple returns to work. A unique case number is generated for the ill or injured person which is used to track details for the Illness or Injury event.
Virus, Illness, or Injury	**Witness Details** region attributes: Person Type Name Phone Email	You can add one or more witnesses to the event and specify the related details in the region.
Issue	Issue Event Details region> **Issue Type**: External Non-conformance Internal Non-conformance Incident event Investigation Permit violation Other	Select a value from the **Issue Type** list.
Unsafe Act	Event Details region> Unsafe Act Type	Select a value from the Unsafe Act Type list. For example Incorrect Use of Personal Protective Equipment, Job Safety Analysis Not Followed
Near Miss	Person Property Vehicle Other	Select a value from the **Near Miss** list.
Property Damage	Event Details region> Property Damage Type Public Private Company Employee Contractor	Specify a value from the **Property Damage Type** list.

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Event Type	Event-Specific Regions and Attributes	Description
	Customer Supplier Other	
Unsafe Condition	Event Details region> Unsafe Condition Type Biological Hazards Physical Hazards Security Hazards Equipment or Machinery Hazards Ergonomic Hazards Chemical or Dust Hazards Other Unsafe Conditions	Specify a value from the **Unsafe Condition Type** list.
Spill or Release	Attributes Spill or Release Type Total Mass or Volume Released and Recovered Possible Cause What was Spilled or Released Spill Kit Deployed Cleanup Team or Contractor Notified Does Spill Kit Need Replenishing?	Specify the values for these attributes and other related attributes for the Spill or Release event.
Notice of Violation	Event Details region> Violation Type	Specify the value in the Notice of Violation type for the event. For example, EPA, OSHA, Police, and so on
Vehicle Incident	Attributes: Road Condition Light Conditions Weather Condition Traffic Traffic Controls Police Report check box Police Agency Location Rental vehicle	Specify the values for these attributes and other related attributes for the vehicle incident event. Specify vehicle insurance details and details of rental vehicles involved in the accident or rental vehicles used as replacement.

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Event Type	Event-Specific Regions and Attributes	Description
	Rental vehicle replacement Insurance information	

Create Incident Events

You can record information about the events associated with the incident. You can create multiple incident events at the time of reporting or managing the incident.

1. From the **Events** page of the incident, click **Add** to create an event.

   > **Note:** Your administrator may want to show or hide or modify the event names by defining them in the **Manage Incident Events Lookup** page. Based on those settings you can find the event types.

2. Click the event type. The respective event details page for the event type opens.
3. In the **Incident Details** region, enter the Summary, Description, Date and Time of the event, Reported Data and Time, Level of Security, and Lessons Learned.
4. Click **Save**. The event is created and appears on the Events page of the incident.
5. You can track notes for the event in the **Notes** region. Click **Add**.

   a. Specify note for the event.
   b. Click **Save**. The note is saved and is displayed in the Notes region with the name of the person who created the note and the date it was created.

6. In the **Event Owners** region assign a person to own the event and set the target completion date.

   > **Note:** When the event is complete, you can close the event by selecting the Completed check box and specifying the completion date.

7. If any action is required from the event owner, select the **Action Required** check box.
8. Click **Save**. The event is created with a unique event number and displayed in the list of events for the incident.

The application generates a unique identifier for the event and is displayed in the list under the Events page. All the events that are created for the incident are listed here in this page.

Create Investigations

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** page of the incident, click **Add** to create an investigation.
2. Specify these details in the **Investigation Details** region:

   a. Date and Time
   b. Summary and Description
   c. Investigation Type and Incident Event
   d. Lessons Learned
   e. Click **Save and Close**. The investigation is created and appears in the **Investigations** page of the incident

3. In the **Investigation Questionnaire** region, you can add the investigation questionnaire to answer questions related to the incident. Click **Edit**.

   a. Search for and select **Questionnaire Name**. The questions appear in the region. You may want to answer the questions now or later too.
   b. Click **Save**.

4. In the **Findings** region, click **Add** to create findings.

   a. Enter the **Finding Summary** details and **Notes**.
   b. Select the **Level of Security** and specify **Finding Response**.
   c. Optionally, you can create recommendations for every finding. Click **Add Recommendation** link and specify your recommendation.
   d. Click **OK** to save the finding. The finding is created and listed in the page.

5. In the **Overall Findings** region, you can specify the **Casual Factors**, **Immediate Cause**, **Underlying Factors**, **Root Cause**, **Contributing Factors**, **Comments**, and **Final Response** and then click **Save**.

6. You can track your Notes for the investigation. Click **Add**.

   a. Specify notes for the investigation.
   b. Click **Save**. The note is saved and is displayed in the Notes region with name of the person who created the note and the date when it was created.

7. In the **Stakeholder** region, click **Add**.

   a. Specify the Name, person Type, and Category of the stakeholders.
   b. Click **OK**.

8. Optionally, you can assign incident investigation **Preapprovers**, **Approvers**, **Reviewers**, and **Owner** and specify the related details. In the **Investigation Owner** region, you can set a **Target Completion Date**. You can track completion details when done with the investigation.

   The application generates a unique identifier for the investigation and is displayed in the list under the **Investigations** page. You can add one or more investigations for an incident.

Create Incident Actions

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

1. On the **Actions** page, click **Add**.
2. On the **Action Details** page:

      a. Enter **Summary** and **Description**.

      b. **Date** and **Time** defaults to when the action was created. Modify it, if required.

      c. Select **Action Type** from the list.

      d. Select **Resources Required**.

      e. Set the **Action Priority** from the list.

      f. Specify the **Estimated Cost** and **Currency**.

      g. Click **Save**.

3. Track notes for the Action in the **Notes** region. Click **Add**.

      a. Specify notes for the event.

      b. Click **Save**. The note is saved and is displayed in the **Notes** region with name of the person who created the note and the date when it was created.

4. Assign incident action stakeholders, reviewers, preapprovers, and approvers in the respective regions of the incident page and specify related details. Assign an incident owner and update the target completion date. Specify the incident action **Owners** and the **Target Completion Dates**.

5. Select the action priority.

6. Select a safety coordinator for the incident if required.

7. Click **Save**.

When the action is complete, you can update the status and mark it complete.

The application generates a unique identifier for the Action and is displayed in the list on the **Actions** page. You can add one or more Actions for an incident.

Add Attachments to Incident

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

1. On the **Attachments** page, click **Add** to add attachment or links.

2. For files, you can drag and drop the files or click **Add File** to specify the file path.

3. For links, click **Add Link** and specify the URL and click **Save and Close**.

The file name including the size and the person name who posted the attachment is listed in the **Attachments** window. You can download the attachments or delete them.

4. Click **Save**. The files and links are listed in the **Attachments** page.

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.

Pages	Roles
Incident Events	Incident Event Owners
Investigations	Incident Investigation Reviewers, Incident Investigation Approvers, Incident Investigation Owners
Incident Details	Incident Reviewers, Incident Approvers, Incident Owners

Related Topics
- How can I close an incident action?
- How can I close an incident event?
- How can I reopen an incident?
- How can I delete an incident?

FAQs for Managing Safety Incidents

Why can't I link a related incident?

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, such as the incident owner or reviewer.

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 page of incident details, 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.

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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.

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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.

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