# SAFETY REPORTS

Corrective Action Tracking

This guide is to help web administrators manage electronic corrective actions using the Safety Reports System, and Safety Inspection App. Corrective Actions are generated when an inspector in the field, notes a negative observation, and submits their inspection. This system is built to track the follow up generated by this submission. Management methods shown are Electronic, Manual and Both. Each may apply to the way follow ups are handled to any particular company according to their internal setup.

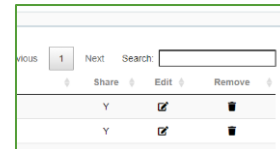### Setting Corrective Action Tracking Method

To set corrective action tracking use the 'Company Maintenance' function on the far-left hand side of the admin site.
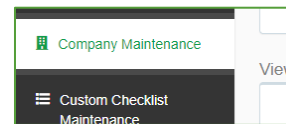
Use the 'User Accounts' drop-down to display the company list, 'All Users' will show all companies in the account.
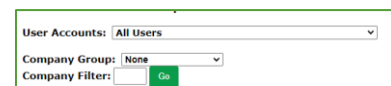
On the row of the inspection company that you want to update settings for, use the 'Edit' button to open the company settings.

Scroll down the page slightly to the 'Settings' section. Use the 'Corrective Action Tracking' drop-down menu to select your management method, 'Electronic' is chosen in the example.
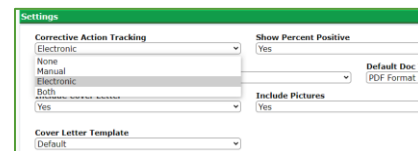
When complete, scroll to the bottom of the screen, and choose the green 'Update Company' button to save your changes.
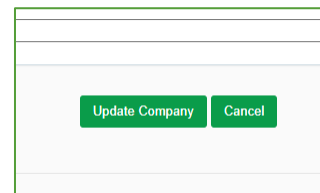
Notes: this same set of steps applies to all tracking methods, 'Electronic,' 'Manual,' or 'Both.'

Manual Corrective Action Tracking

Tracking follow ups manually, if chosen, does not require any action by the administrator in the Safety Reports system. This setting creates a notes field, so that recipients of the report, and/or designees who are to conduct follow ups can record actions they've taken for resolution. Shown in a pair of screenshots here. If at a different worksite, the report is most often printed, updates are written, and either scanned/emailed or faxed back to those doing recordkeeping.

There is no action for the administrator to take in the Safety Reports system, as a 'Manual' corrective action is managed outside of the site entirely on paper, as shown above.

Electronic Corrective Action Tracking

Managing corrective actions electronically in the Safety Reports system is the most common method. The system creates a follow up item for each negative observation in submitted reports as with Manual tracking, the difference is that items are given a unique ID, tracked by the system, and managed by item status "Open/Pending" or "Closed."

Repeat the steps listed for setting Corrective Action Tracking Method in Company Maintenance. After making a negative observation in the mobile app, and submitting a report, electronic follow ups are managed in the 'Corrective Action Tracking' function, among those at the far-left on the admin screen.
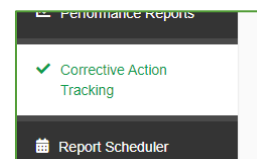
Note: Electronic Corrective Action tracking has the ability to send emails from the Safety Reports system to 'responsible parties,] who can then update action items assigned to them. Ensure only folks who will be involved in this process are named as Responsible Parties to prevent the recipients from mistakenly thinking the messages are Spam. All email messages from Safety Reports are legitimate emails.

Electronic Corrective Action Tracking (cont.)

Use the drop-down menus to filter the list for a certain user, or a certain company. Use the radio buttons to choose a Corrective Action Status.

Inspections with follow up items are shown row by row below these options. The 'Status' column shows whether all items have been closed by "Closed", some items remain open by "In Progress," or all items remain open by "Open." To take action on an item use the 'View' button. To remove the electronic, follow up from Corrective Action Tracking, choose the 'Delete' icon.

Note: Deleting the follow up will cause any potential messages sent to responsible parties who may be receiving them automatically to cease. It will remove the item from this part of the system but will not remove the item from the inspection itself and will not delete the inspection.

After choosing 'View' all open items from an inspection will be shown as individual links. Choose 'Update' on the action item you want to address, #1135982 in the example.

Information about the corrective action is shown, along with assignment to a responsible party, if applicable. To assign the action item to a responsible party, choose the blue link "Select New Responsible Party"

A new column appears showing those available who you can assign to this action item, choose the line with their name, and their name and email will fill-in above, as shown in the pair of examples here before and after selecting the party's name.

Choose the blue "Resend Email Notice" to be sure a message is sent to this new responsible party so they can take action, unless you want to make this action on their behalf. If that is the case, continue down to 'Action'

If an action partially remedies an issue but does not entirely resolve it (scheduling a class in the example) this can be made into an update using the 'Requested/Planned' Action type above the dialogue box. Choose this radio button, add text, your name, or the name of the person you may be entering the update for, the date of the change (the default is current date, current local time but back-dating is allowed). Choose the grey 'Select' button to choose an image which is part of the corrective action, and 'Add More' if adding more than one attachment.

If sending an update to the inspector and company contact that you've taken an action or closed a follow up, 'check' the box to send the email after you Submit changes. Additional email CCs can be added using the field provided. Choose 'Submit' to save your update to this corrective action item.

Electronic Corrective Action Tracking (cont.)

After submission, the status of the action item will show 'Pending' since you took an action but did not close the item.

If an update resolves a corrective action entirely, and no further follow up is needed, follow the same process to get back to the edit screen, where you will administratively 'Close' the action item.

Choose the radio button for the 'Taken/Complete' action, add whatever text is applicable, same with updating party and date of the action. When finished, choose the green 'Submit' button. The past action(s) taken on a corrective action are shown on this screen, at the bottom.

Note: As with electronic follow ups themselves, actions taken can also be deleted, but this will not delete the electronic action item itself.

The item will now show 'Closed' on the Corrective Action Tracking Screen.

Corrective Action Tracking ('Both' Manual and Electronic)

This method combines elements of both of the previously-noted settings for managing corrective actions but involves no additional settings or steps. Reports are created with a 'Notes' section, like with 'Manual' management, the electronic action item is also generated, can be assigned, and set to "Pending" and/or "Closed" status as demonstrated. The most common application of this method is for safety departments which sometimes have responsible parties who make updates by hand, for later entry by an administrator, often with their notes as the attached file.

For more information, contact:
Safety Reports at support@safety-reports.com or (402) 403-6575 option '2'