

Recording Follow Ups for 5Why/Incident Resolution

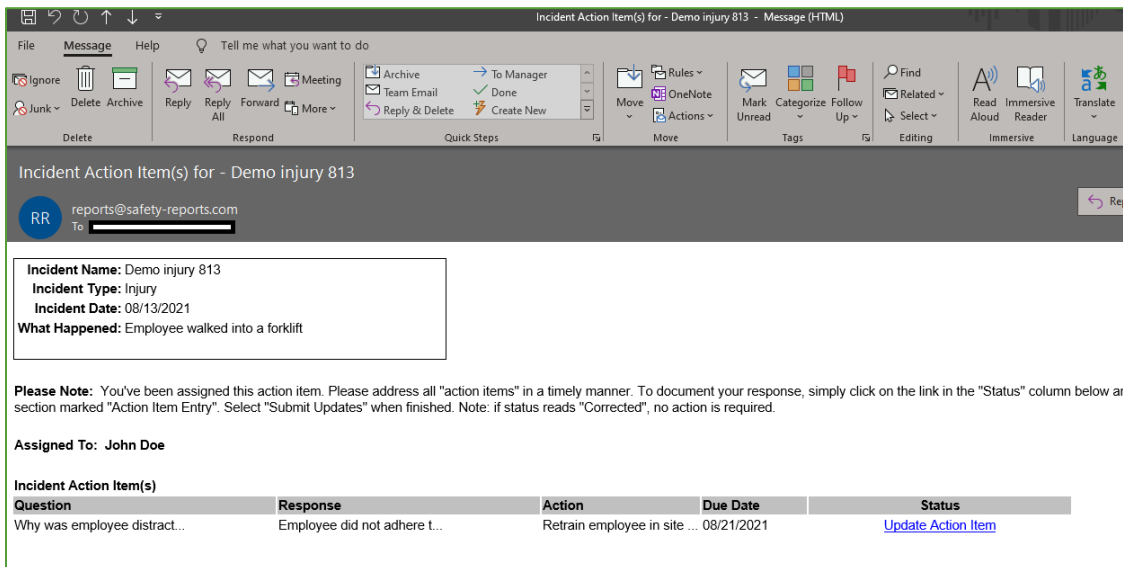
The following steps apply to those who are assigned corrective actions in the Safety Reports Incident System. This guide is meant to serve as a reference for Responsible Parties to record remediation steps for assigned items.

Note: Safety Reports does not assign these items to you. That is done by your account administrator(s) using our system. If you feel another party needs to be responsible to correct an issue, contact your administrator directly, not Safety Reports support, as we are not able to reassign items on your behalf.

Email from Safety Reports

As a responsible party, you receive an email from our system which contains details about Corrective Actions assigned to you by an administrator, as part of the incident investigation and resolution process.

The email, from sender “reports@safety-reports.com” will contain information about the incident, and items assigned to you as part of the 5Why follow up process.



The screenshot shows an email client interface with a ribbon menu at the top. The email subject is "Incident Action Item(s) for - Demo injury 813 - Message (HTML)". The sender is "reports@safety-reports.com". The email body contains the following information:

Incident Name: Demo injury 813
Incident Type: Injury
Incident Date: 08/13/2021
What Happened: Employee walked into a forklift

Please Note: You've been assigned this action item. Please address all "action items" in a timely manner. To document your response, simply click on the link in the "Status" column below an section marked "Action Item Entry". Select "Submit Updates" when finished. Note: if status reads "Corrected", no action is required.

Assigned To: John Doe

| Incident Action Item(s) | Response | Action | Due Date | Status |
|--|------------------------------|------------------------------|------------|------------------------------------|
| Question Why was employee distract... | Employee did not adhere t... | Retrain employee in site ... | 08/21/2021 | Update Action Item |

Choose the 'Update Action Item' Link in order to view the corrective action details, and to record any steps you have taken to remediate the item.

This is discussed on the following page.

Corrective Action Tracking – Web Browser Window

The link will open a new page in your web browser, containing details such as photos about the specific item in question from the incident, along with the ‘Question’ the action pertains to in the 5Why process.

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Action Item Tracking

Incident Name: Demo injury 813
Incident Desc: Employee walked into a forklift
Incident Date: 08/21/2021

Question: Why was employee distracted?
Response: Employee did not adhere to policy, retained cell phone or
Action: Retrain employee in site policy

Photos



In order to record your actions, scroll down the page below the photos section to the section titled “Action Entry” where you are able to input actions taken. You are able to make the incident follow up one of two statuses, ‘pending’ or ‘closed’ depending on the action.

This is discussed on the following page.

Action Entry

Two types of actions can be entered into the system. If the corrective action has been dealt with and no further action is needed, select the 'Taken/Complete' radio button, and add important details – this will close the follow up. If the corrective action has been addressed in part, but further actions are needed to complete the job, select the 'Requested/Planned' radio button – this will put the follow up in a 'pending' status.

Action Entry
Please document the corrective action taken or planned below.

Action:
 Taken/Complete Requested/Planned

Retrained Employee As Required

Updated By: John Doe

Action Date: 8/25/2021 3:41 PM

Submit Updates Cancel

In either case, add details about the remediation in the text field. Your name or initials must be recorded. Use the time and date box to show the actual date/time action was taken, this can be backdated if entry is being done after the fact. Be sure to choose 'Submit Updates' to save the actions you took.

January 2020

| S | M | T | W | T | F | S |
|---|----|----|----|----|----|----|
| 1 | 29 | 30 | 31 | 1 | 2 | 3 |
| 2 | 5 | 6 | 7 | 8 | 9 | 10 |
| 3 | 12 | 13 | 14 | 15 | 16 | 17 |
| 4 | 19 | 20 | 21 | 22 | 23 | 24 |
| 5 | 26 | 27 | 28 | 29 | 30 | 31 |
| 6 | 2 | 3 | 4 | 5 | 6 | 7 |

Action Date: 1/2/2020 2:58 PM

Submit Updates

Previous Actions

For more information, contact:

Safety Reports at support@safety-reports.com or (402) 403-6575 option '2'