LITE - User Guide

June 2019

Prepared For:

Diligence

WHS Online. Simplify. Comply.

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INTRODUCTION

Diligence LITE – Good for Your Health

Introduction

Welcome to Diligence LITE – your safety and injury management just got a whole lot easier and your company will be a whole lot more compliant. Diligence LITE is the 'beginners' program' – we've switched 8/10 of the Diligence system off to create Diligence LITE so you can only see what buttons are available to you right now.

Why?

Ever got a new mobile phone? It takes a while to get used to. Humans i.e. your employees, don't like change. They especially don't like lots of new things introduced at once. We have taken the same approach to this digital WHS and RTW platform as we do when we develop a safety system for any business. You can't hand a whole heap of policies and procedures over a desk and go 'there you go company – make this work'. Because that doesn't work.

Simple works. Especially for a new platform or process. So, we start you off with the functionality that 98% of our clients want;

- Checklists / audits (you can run 70% of a safety system through these)
- Near miss and incident reports
- Investigating those reports to generate corrective actions
- Tasking people with safety actions and keeping track of their completion
- Managing injuries

Check that things that should be done are being done (checklists) and if something goes astray, manage the incident effectively.

Don't be fooled that the Diligence system can't manage your entire safety and injury management system with;

- Risk assessments – basic and advanced
- Safe Work Procedures
- Planned Task Observations
- Auto generated safety committee agendas and minutes
- And much more

But that's for later. Let's get you familiar with this condensed system first.

Diligence LITE.

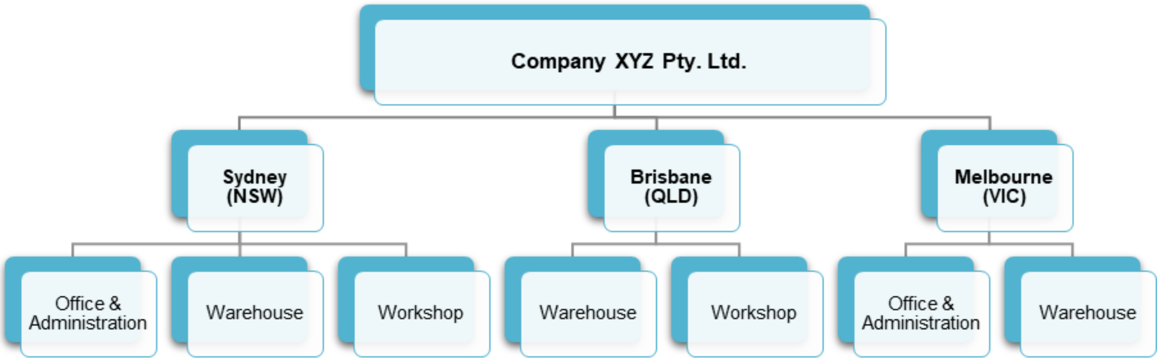
To make your life, as someone charged with managing safety in your organisation, MUCH easier!

SYSTEM SETUP

Your Recovery Partners consultant will set up the basics in Diligence so you can just start using it. They will use this as a guide.

⌂ Operations

- **Regions / Operations –** Generally, this will be a city or suburb followed by the state of your operations or premises i.e. Sydney (NSW), Brisbane (QLD), Melbourne (VIC) etc.
- **Areas –** Following this, we breakdown those operations or premises into certain 'Areas' within those operations, example in the figure below.



⌂ Users & Types

- Prime Control
- Control
- Standard
- Input

⌂ Checklists

- What system ones do you want to keep?
- What built ones do you want?

⌂ Notifications

- What do you want to be notified of?

⌂ The Diligence Application

- How to download and use

⌂ HSE Roles

- This gives certain users certain roles within the system i.e. Incident Investigator (will allow this user to be selected to investigate any incidents) etc.

SYSTEM OVERVIEW

Status Reports

- This is your corrective action register – everything noted that is not conformant or needs improving auto saves in here. nothing can get forgotten until its closed out
- Assign tasks, get reminders, know who is overdue – get it done!

Checklists / Audits

- 45 already in the system - build your own – anytime!
- Any issue found auto enters the status reports

Incident Management

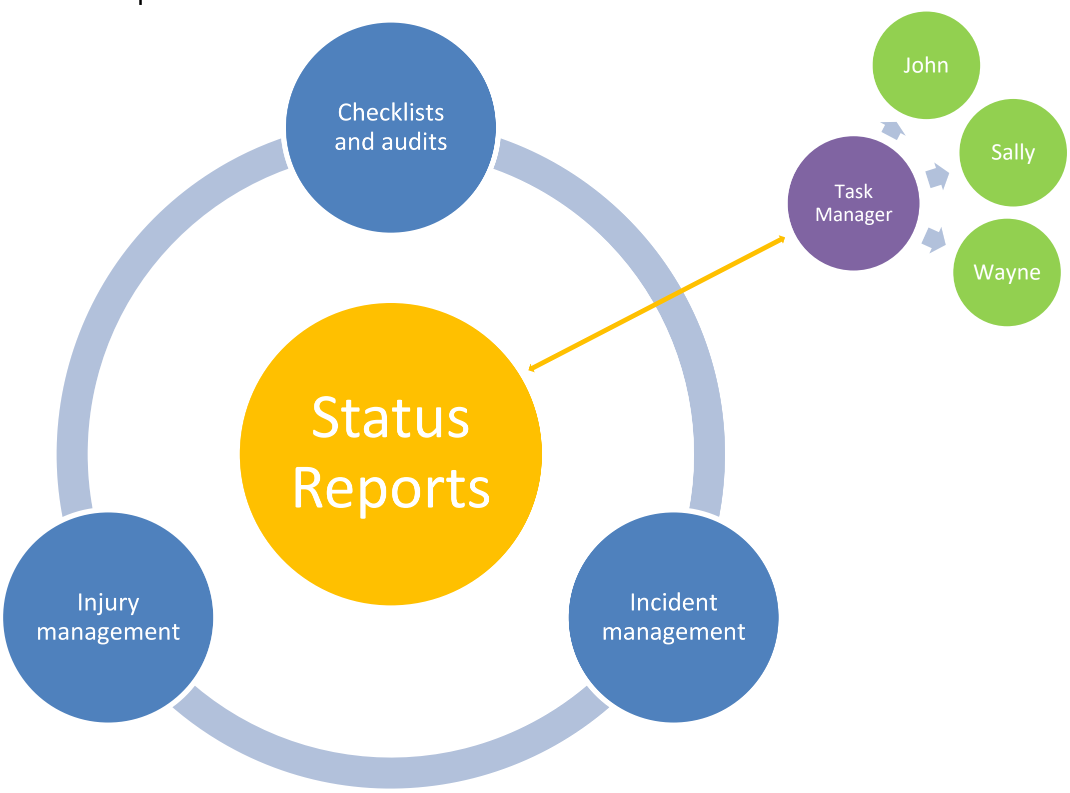
- Workers can report near miss and incidents
- Diligence Lite will prompt for an investigation – any issue found auto enters the status reports

Injury Management

- Incidents resulting in injuries enter a staged process of management
- RTW plans, reminders on medical certificates and much more

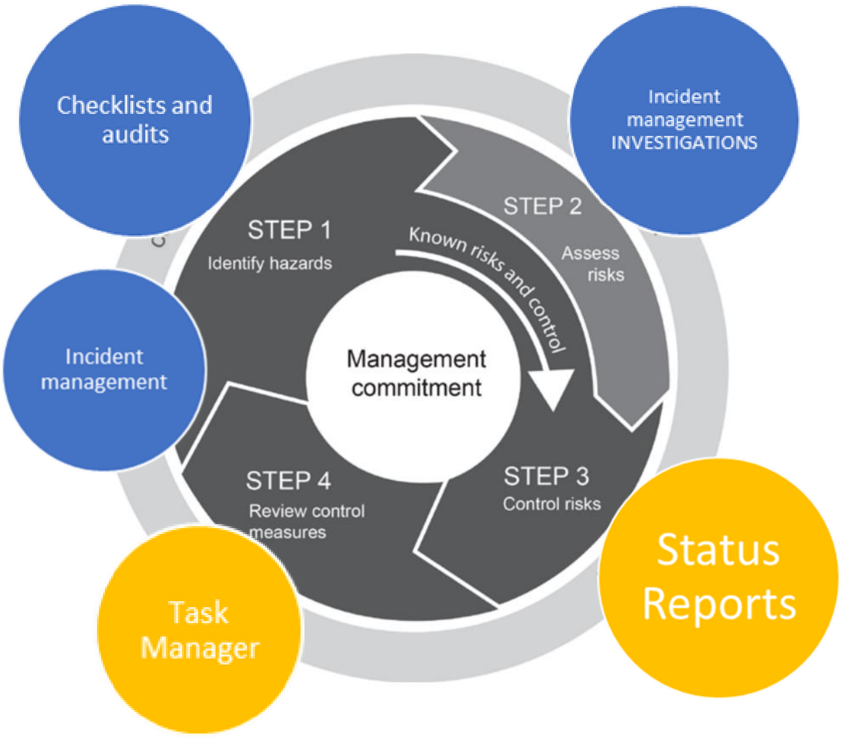
Task Manager

- Assign tasks directly out of status reports or as you want.
- Know who has completed and who is overdue



Legal Compliance

You will notice in the Model Code of Practice How to Manage Work Health and Safety Risks, the risk management wheel. We have aligned Diligence LITE with this.



Best Practice Compliance ISO45001

ISO45001 has just been published and is a new world-wide standard for OHS Management System requirements. Diligence will also assist in achieving ISO45001 compliance.

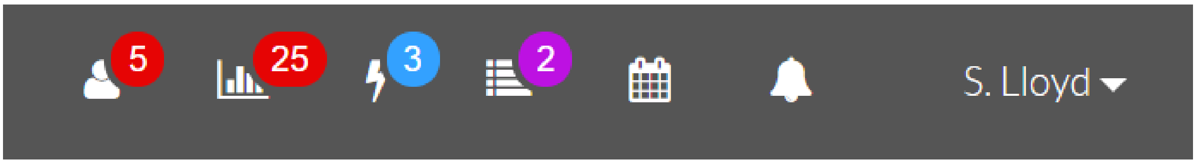
NAVIGATION

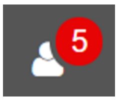
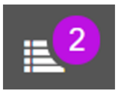
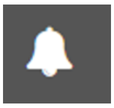
Navigation bar – Left Hand Side of screen

DEMO - Diligence Lite	
Dashboard	Home page. Tell us what you quickly want to see.
Organisation Workspace	Only Control Users can see this button. This is where you can add users, add employees, determine what they can do and see, build your own checklists. Things that you don't want everyone to do.
My Workspace	This area is where you complete all your risk management actions. We have switched a lot of things off in here to keep it simple. For now – this is where you find your **CHECKLISTS**
Status Reports	Think of this as – 'what's the status of my **CORRECTIVE ACTION REGISTER?**' What do we need to do to be more compliant? What do we need to improve? You can assign tasks for completion directly from here.
Task Manager	Assign people tasks and keep track of completion. These are tasks related to anything required in the system, not just Corrective Actions.
Incident Management	**REPORT** near miss, injuries and Vehicle-Equipment-Property-Incidents (VEPI). Any injuries enter the first aid, medical treatment or lost time **INJURY MANAGEMENT** streams. Investigations can be initiated.
File Manager	Upload documents like your WHS Policy. Also, any document completed in the system is saved in here as a PDF with a search function.
Online Guide	Screen shot demos of how to use the entire system. Don't worry about this right now and use this document. Keep it simple.

Top Bar – top Right Hand of screen

The Top Bar is your alert centre to quickly see what new actions are required by you, what actions need to be assigned to someone else and what actions have occurred.



	My Actions (Actions from Status Report that I've been asked to do). If you have none the man icon will not appear. If you are assigned a status action it will appear here.
	All Status Report Non-conformances. Think of a status report as a non-conformance report. All users can see all non-conformances as they may be asked to assist in the corrective action. *THIS IS CHECK AND CORRECT* in the ISO45001 process.
	Notifications; There are 56 types of notifications the system can alert you to. E.g. 'tell me when someone has finished a checklist'. Tell us what you want to be notified of and we can set this up for you. You will be notified by email and via the lightening symbol.
	Confirmations of Tasks; This is to show the person that set a task for someone – that its been done. This way you can quickly check its been done the way you wanted it to be and close it out. Only the control and standard users can see this. An input user should never see this icon as they can only assign themselves tasks – not other people.
	Task Manager; This shows a list of Tasks that need to be completed by whatever user has logged in.
	Reminders; Show you anything that is about to expire in the system. E.g. Medical certificates, contractors licences etc.
	Log out / Profile (Profile shortcuts you to My Workspace / Profile where you can change your password).

USER TYPES

Every organisation is different. Talk to us about who should do what throughout your business and we can help set this up for you.

Remember – no organisation can be compliant with WHS laws if there is only one person doing all the safety activities. In fact, the law states that management have responsibility. Management don't have to do the actions – but they have a legal obligation to ensure they are done. With that in mind Diligence LITE is all about assigning who will be responsible and who will do the actions.

The 4 main types of users are;

1. **Prime Control User:** sees entire company and all sites (operations) and all areas within those operations. Can set up employees, alter headers and footers, set up users, set up the entire system and is the controller of the program. Can do everything the users below can. Who will be running and overseeing the overall system? Often a WHS Manager or HR Manager.

2. **Control User:** As above but can only see operations within a singular region that person oversees. Cannot set up employees. Cannot alter headers and footers. Can add users and manage the entire system and controller of the program in their region. Can see and manage all operations and areas within that region. Can do everything the users below can. Who will help run the system in a particular region? Could be an Area Manager. Smaller organisation's won't need 2 layers of control users.

3. **Standard User:** Normally Operational Manager or departmental/shift etc manager. These people make decisions on actions that are required i.e. allocating action to persons to complete. They hold those responsible accountable for completion of tasks. Who is responsible at a site level? Maybe the site/branch manager.

4. **Input User:** These users put into the system like completing checklists, incident reporting etc. They cannot allocate actions although they can see the status reports and put in progress reports etc. Who will perform most of the activities e.g. complete inspection checklists? Often a WHS Committee member or HSR. Maybe the operator of a machine or vehicle.

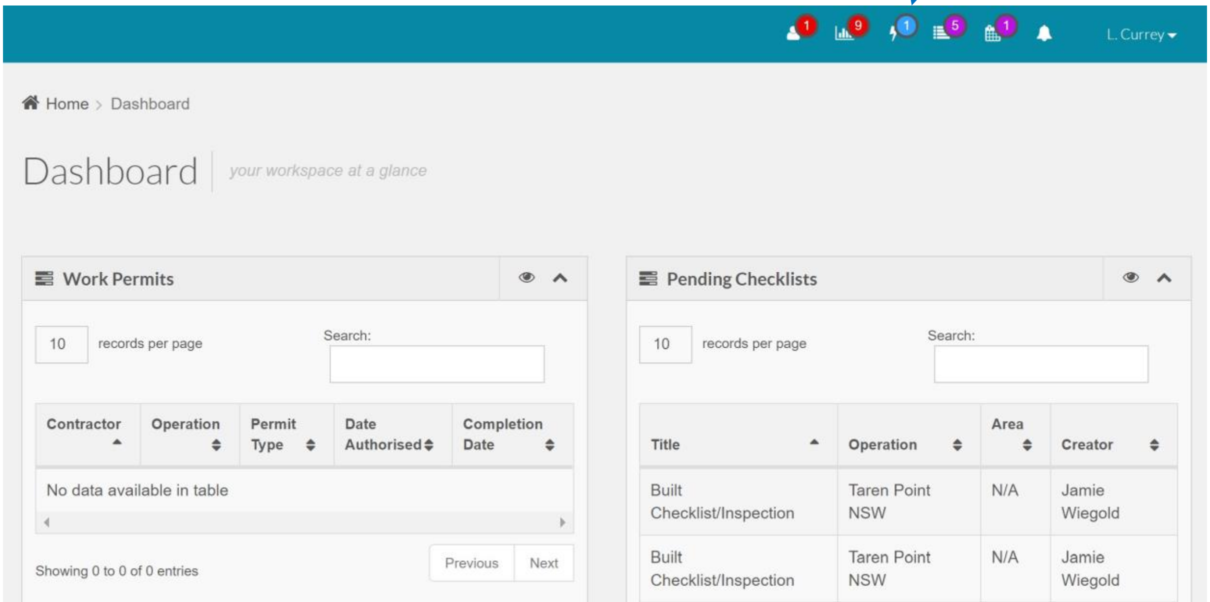
NOTIFICATIONS

Be notified when anything happens on your system! Notify was built so that you stay informed via; System Alerts and Email. This allows for the effective achievement and awareness of system functions. There are numerous notifications that are useful for numerous reasons, but as we don't want 100's of emails clogging our inbox, we have listed the most recommended notifications below:

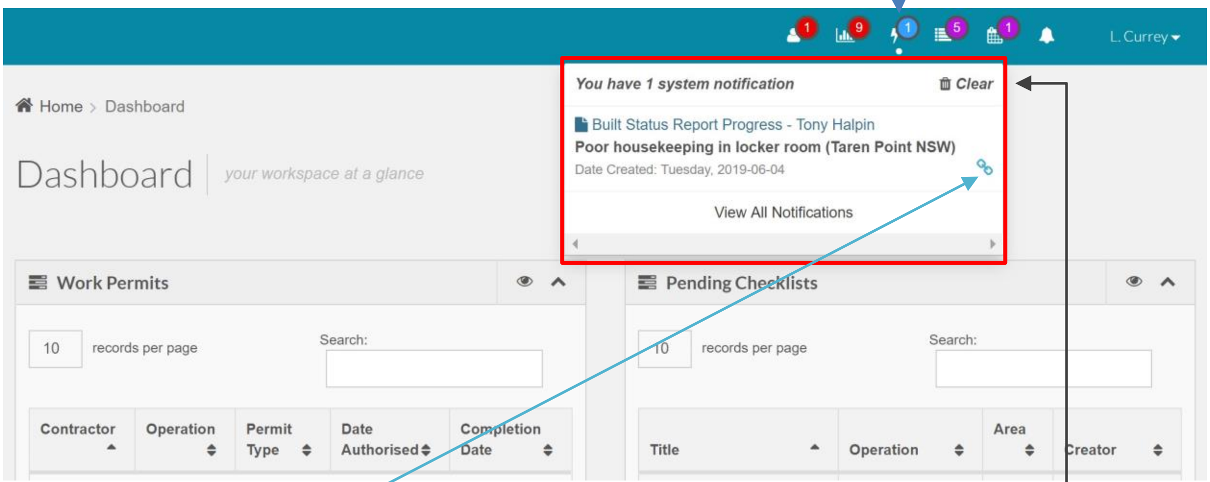
Type	Name	Description
Status Reports / Risk Register	All Status Reports	A status report has been updated
	All status report progress	Progress has been added on a status report
	All status report dependency	A dependency action has been made on a status report
	All Status Report Actions	An action has been made on a status report
	All Status Report Ops Manager Remarks	An item has been closed off on a status report
	All status reports action date missed	An action for a non-conformance has been missed on a status report
	No built status report action added	When a built status report action has not been actioned after 7 days
	No Ad Hoc status report action added	When an Ad Hoc status report action has not been actioned after 7 days
Incident Management	Incident Report Created	An incident has been reported
	Notifiable incident created	When an individual has been injured
	Incident Investigation Report Role	An Incident has been created, and you are one of the Investigative members
RTW / Injury Management	Injury Management Role	An Incident has been created, and you are the Injury Manager
***Optional Notifications**	Missed Task	An assigned task was not completed
	Appointment Creation	Appointments are created
	Checklist Completed	A checklist was completed
	Document creation	Any document is created
	Incident ad hoc hazard	All checklist notifications
	Risk Assessment	Risk Assessment Creation
	Root Cause Analysis Completed	A root cause analysis request has been completed

The **Optional Notifications are not recommended for every user or to be switched on forever, these are likely the notifications that will clog your email inbox. However, these notifications can be extremely useful for certain positions / roles or in the beginning of Diligence implementation to observe tasks are being completed through the system as required and are not missed.*

The ‘Notifications’ will appear on the ‘Top Task Bar’ in the form of a ‘Lightning Bolt’ icon. Whatever notifications are there, will be numbered as can be seen below.



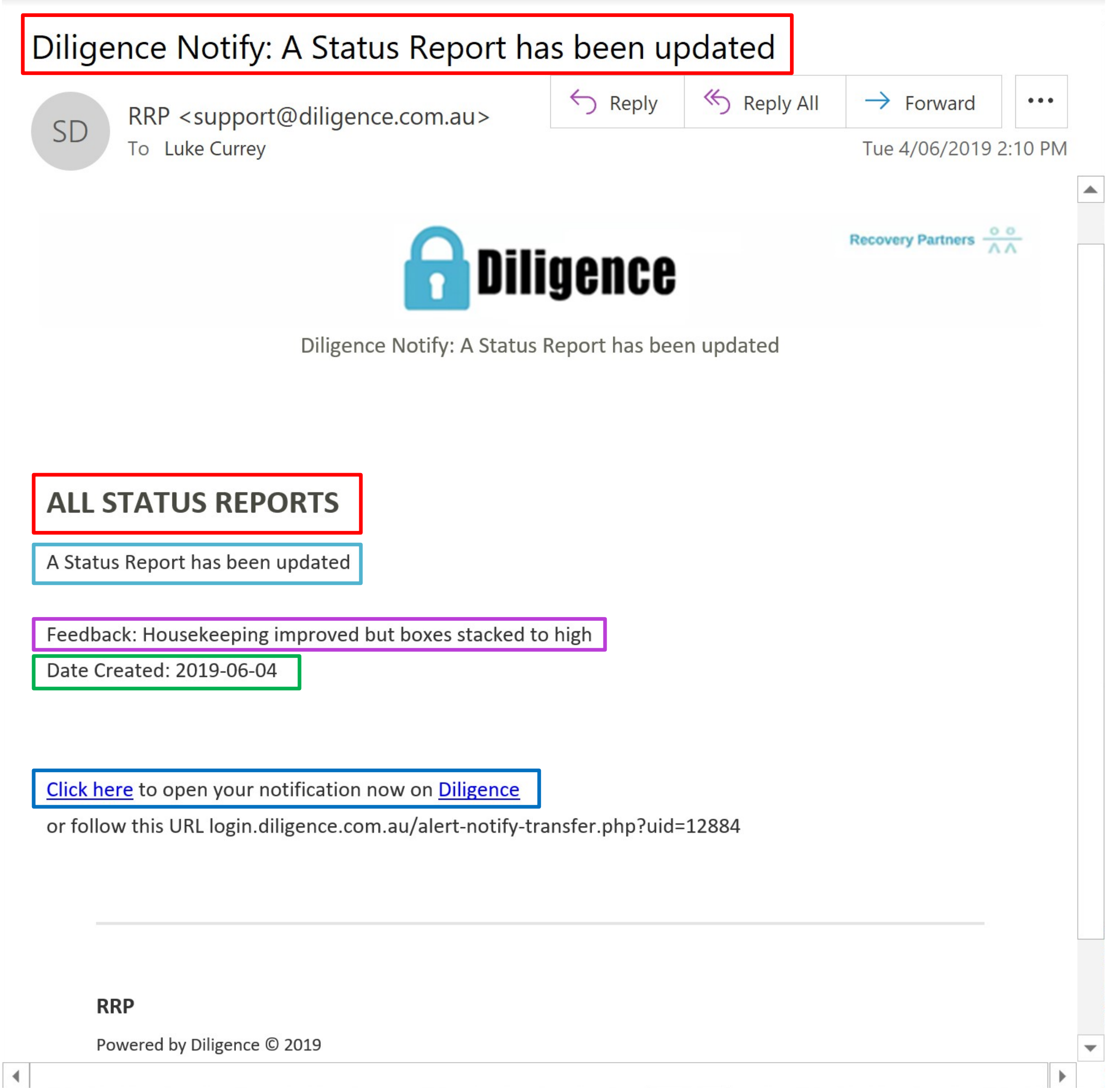
CLICK on the ‘Lightning Bolt’ icon (Notify) and a drop down with all the ‘Notifications’ will open.



CLICK on the notification ‘Link’ icon and you will be taken to the item requiring your attention.

Note, in the top right of the notification drop down, you will locate the ***‘Clear’*** button with a bin icon next to it, ***CLICKING*** this will allow the clearance of all notifications.

Lastly, an email, as seen in the format below, will be sent to all users that have this notification turned on.


Diligence Notify: A Status Report has been updated

SD RRP <support@diligence.com.au>
To Luke Currey

Reply Reply All Forward

Tue 4/06/2019 2:10 PM

Diligence

Recovery Partners

Diligence Notify: A Status Report has been updated

ALL STATUS REPORTS

A Status Report has been updated

Feedback: Housekeeping improved but boxes stacked to high

Date Created: 2019-06-04

Click here to open your notification now on Diligence

or follow this URL login.diligence.com.au/alert-notify-transfer.php?uid=12884

RRP

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In this email you will see:

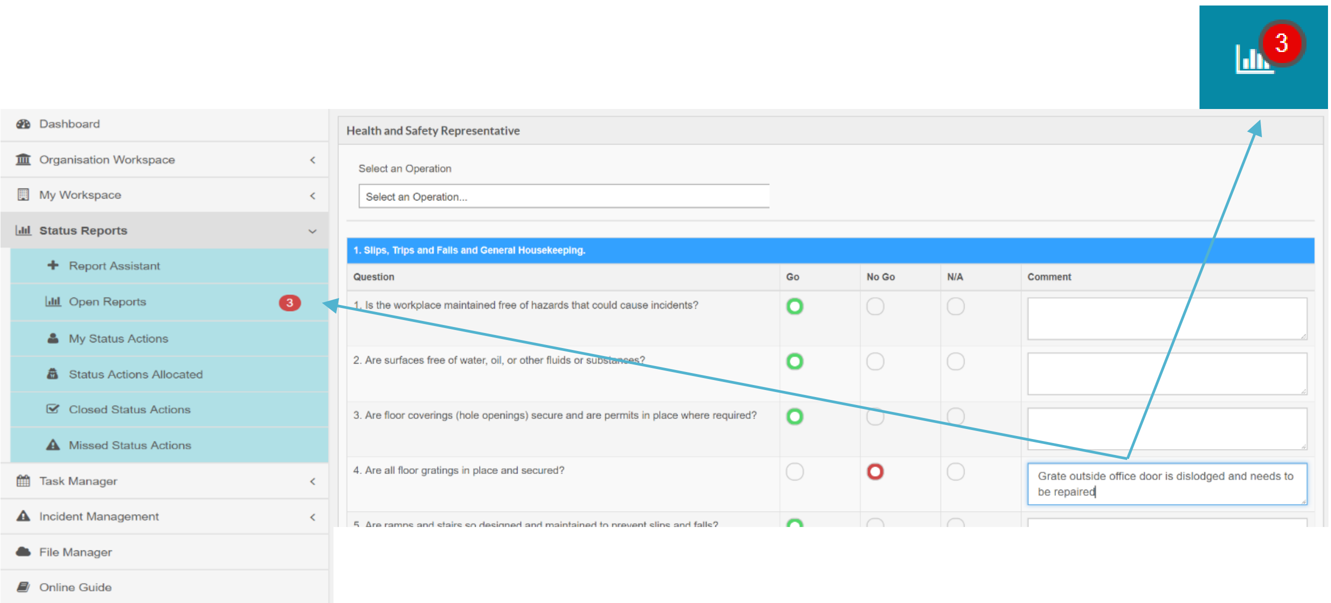
1. System notification type
2. Description of notification
3. Feedback or comments
4. Date feedback or comments were created
5. A link to open the notification now on Diligence

CHECKLISTS

Let's keep it simple and start with checklists. Build your own or use one of the 43 already in the system. Checklists can be used for thousands of uses in safety. Even pilots use a checklist before they start the plane. Each workplace will have a different requirement, but some examples of checklists may be;

- Workplace hazard inspection checklist
- Forklift pre-start checklist
- Induction checklist
- Safety harness checklist
- Event planning checklist
- Slips trips and falls checklist
- Pre-excavation checklist
- Scaffold inspection checklist
- Food safety checklist
- Its endless – and easy!!

Mark **'Go'** if its good and **'No Go'** if something needs doing or **'N/A'** if it doesn't apply. Anything marked 'No Go' and commented on automatically enters the Corrective Action Register and shows up in your Status Reports. (check the Status reports in the Left Bar or the symbol on the Top Bar).



Why do we use **'Go'** and **'No Go'** instead of Yes and No?

Let's look at this question asked two different ways;

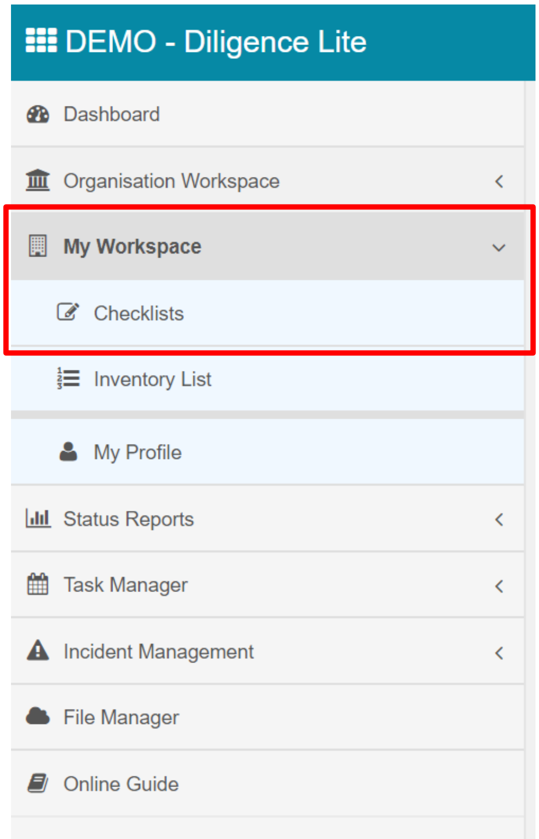
1.	**Is the floor clear of trip hazards?**	'Yes' = **Good**	'No' = **Bad**
		'Go' = **Good**	'No Go' = **Bad**
2.	**Are there any trip hazards on the floor?**	'Yes' = **Bad**	'No' = **Good**
		'Go' = **Good**	'No Go' = **Bad**

By using **'Go'** and **'No Go'** it doesn't matter how the question is asked in the checklist. All items seen as not correct or needing improvement will be answered as **'No Go'** and auto populate the Status reports for action. So, you don't need to think too hard when you create a checklist and it doesn't matter who you get to create a checklist.

Let's Get Started

You can build your own checklists but let's get the guys and gals at Recovery Partners to do this for you at this stage. Keep it simple and just focus on getting safety compliance up and running by getting others in the business using the system and making your job at controlling safety throughout the business easier.

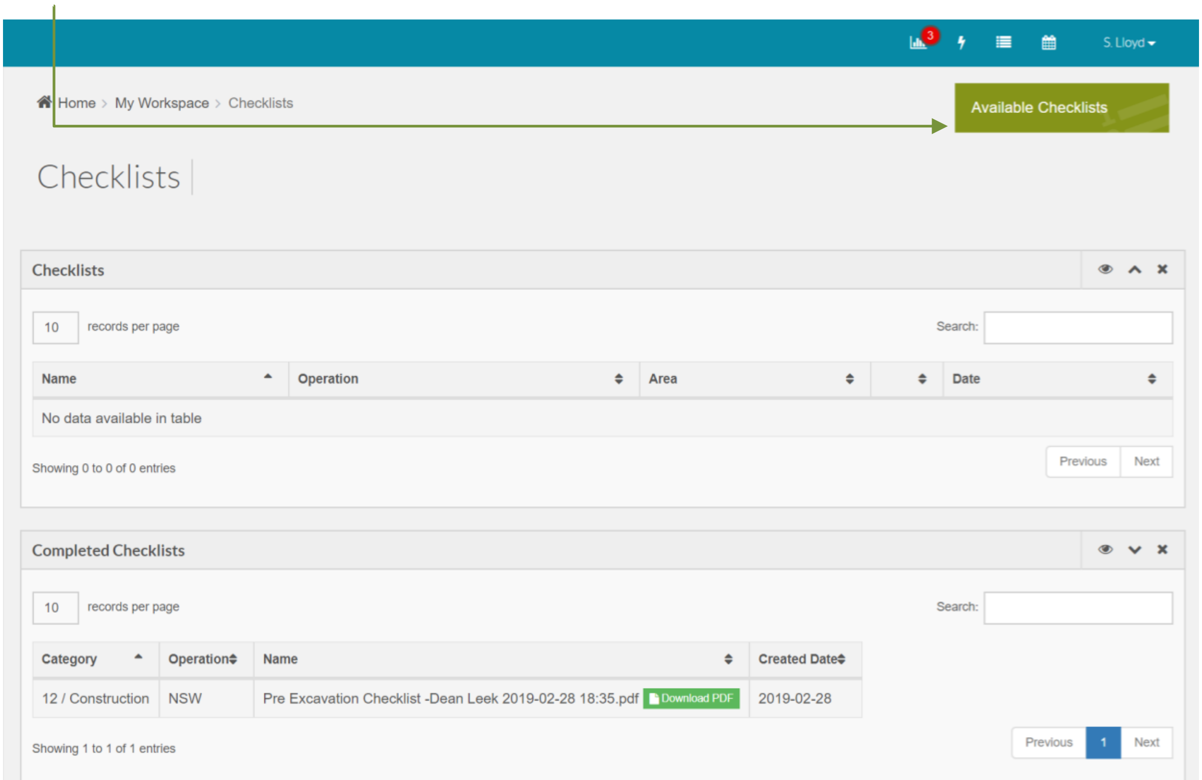
You can look at what Checklists are available by doing this….

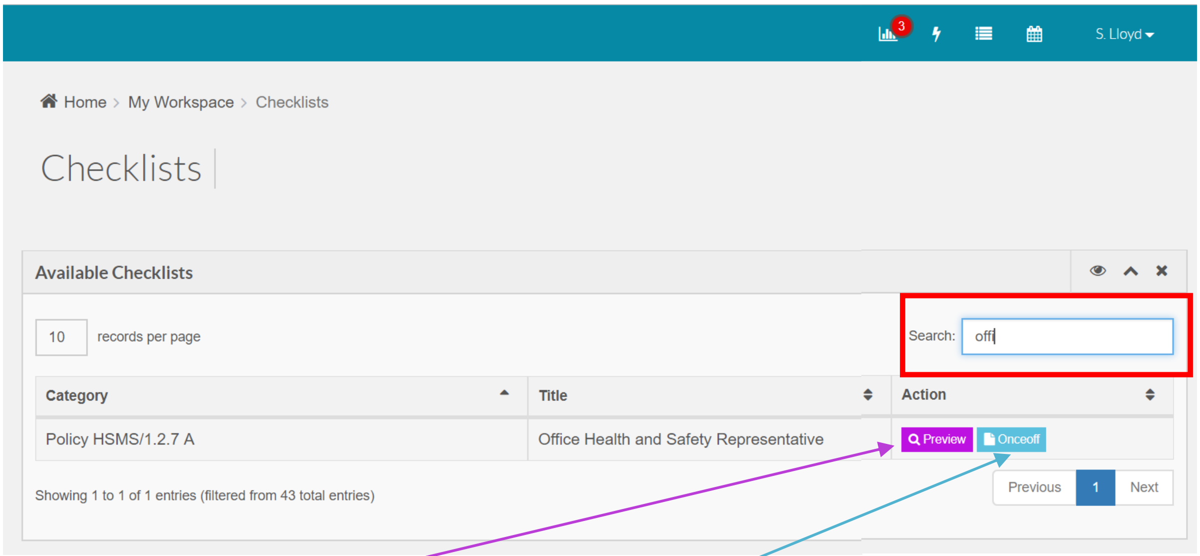


CLICK on 'My Workspace' (Side Bar), then ***CLICK*** on 'Checklists'.

This will open Checklists on your main screen area.

CLICK on ‘Available Checklists’ and use the ‘Search Area’.



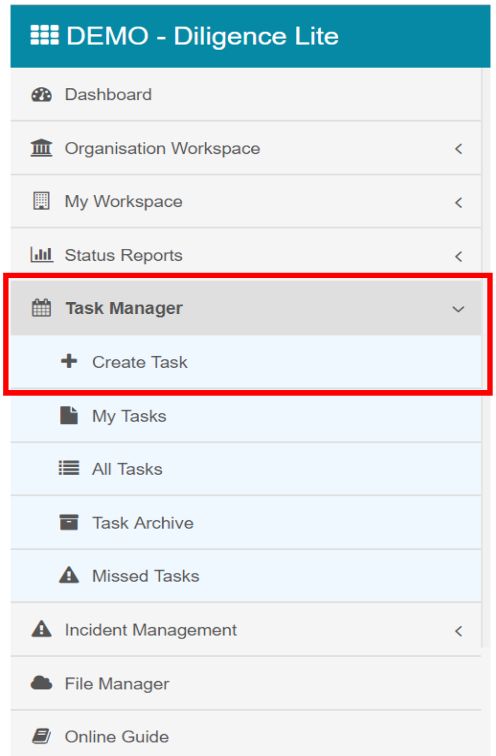


You can ‘Preview’ the checklist or complete a ‘Onceoff’ of the checklist yourself by ***CLICKING*** the appropriate button.

To get someone else to complete the Checklist you need to TASK them.

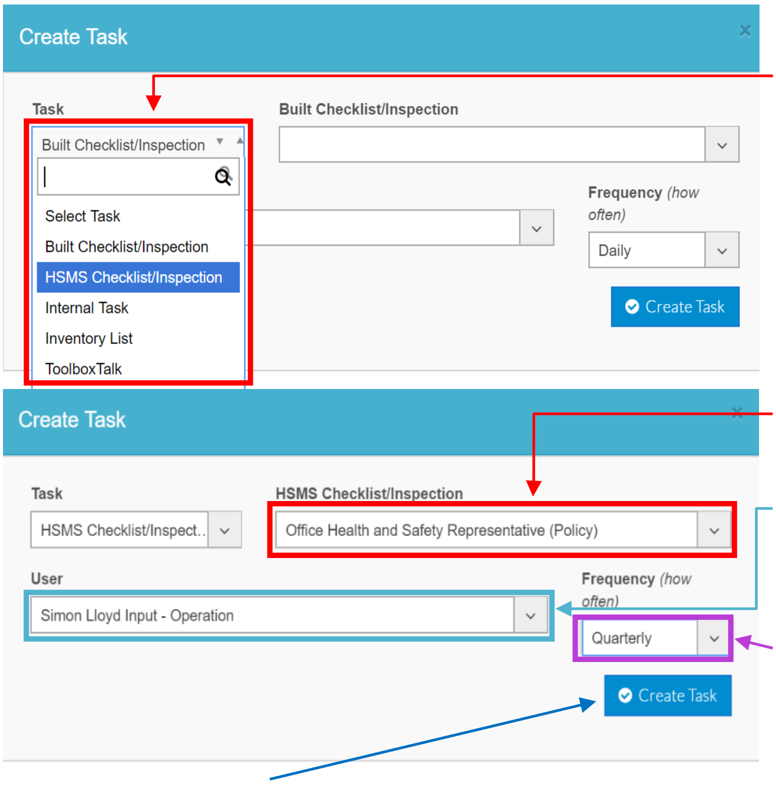
TASKING A CHECKLIST

(Only Control and Standard Users can do this)



CLICK on ‘Task Manager’ (Side Bar), then ***CLICK*** on ‘Create Task’.

The Create Task window will open.



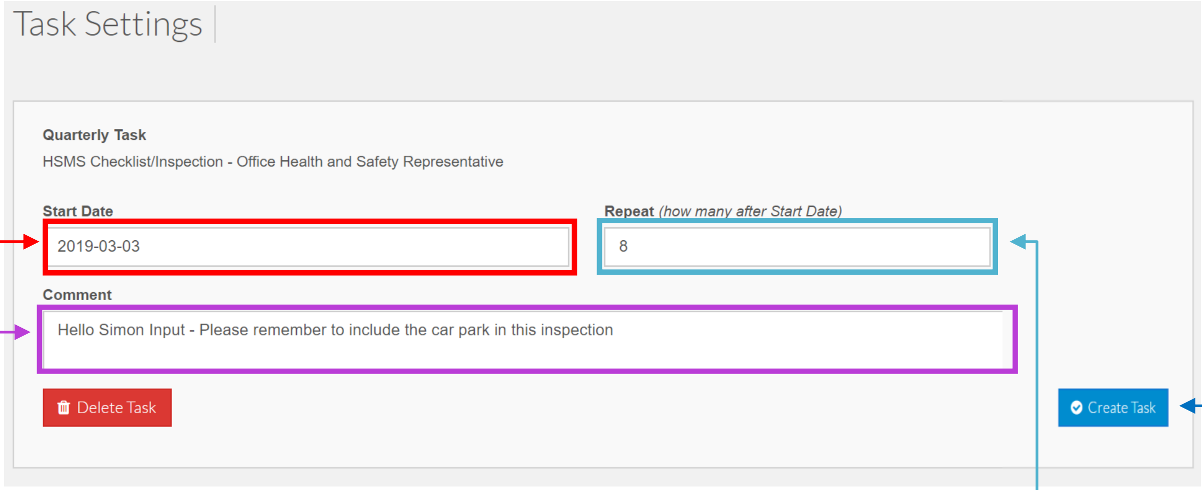
SELECT what type of checklist;
One from the system (HSMS checklist), or
One that has been built by/for you (Built Checklist)

SELECT the checklist, then

SELECT who you want to complete it, then

SELECT how often you want then checklist completed, then

CLICK ‘Create Task’. The Task Settings Window will now open.



SELECT the 'Start Date' of when the task should start, then

SELECT how many 'Repeats'.

In this instance, it's a quarterly inspection so 8 repeats are 2 years' worth of inspections.

ADD any 'Comments' that you want the person completing the checklist to consider, then

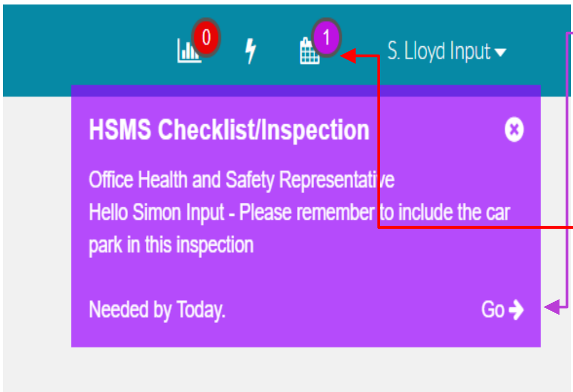
CLICK 'Create Task'.

Awesome! You've just created an ongoing task for someone.

COMPLETING THE CHECKLIST

(Any user type can be assigned this task but usually it would be done by an Input User)

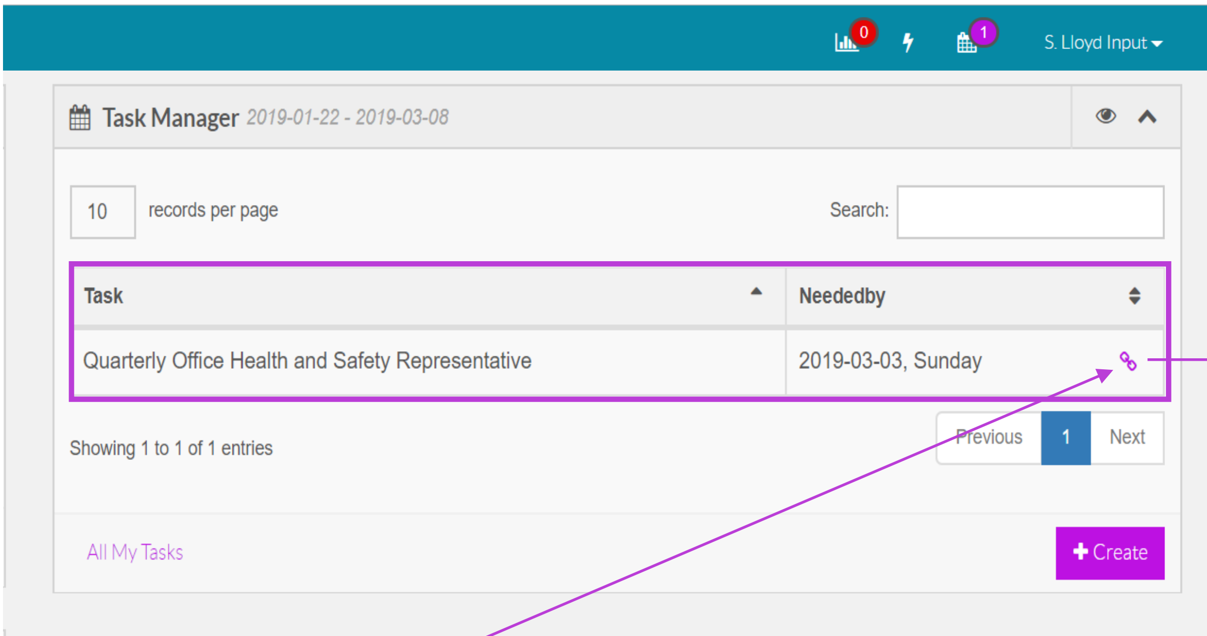
The assigned person will now get this notification in 4 ways



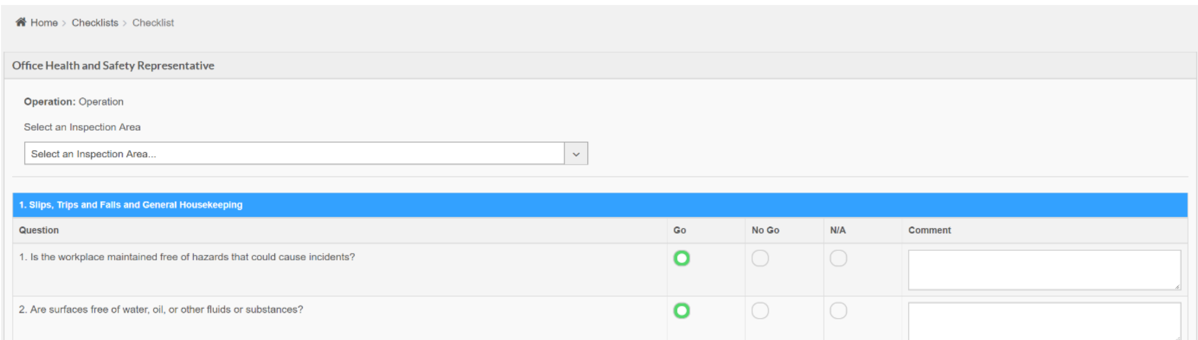
They can ***CLICK*** on 'Go →' and it will take them straight into the checklist, as seen below.

Or they can come back later and ***CLICK*** into the 'Task Manager' symbol, which will take them straight to the relevant task. You can see the numeral 1 indicting this person has 1 incomplete task waiting for them.

They will also see their Dashboard Task Manager area that shows what they need to complete.

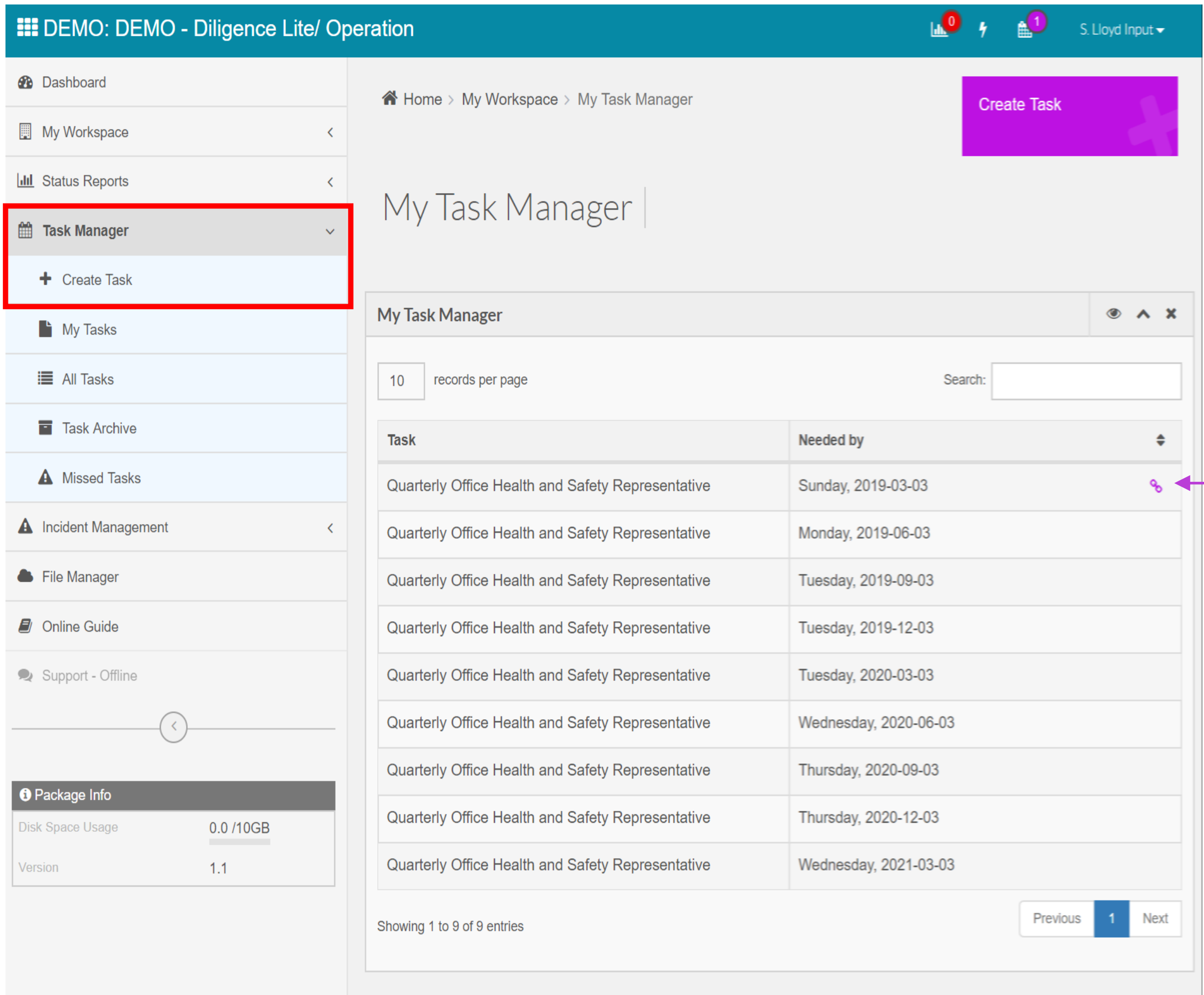


By ***CLICKING*** on the 'Chain Icon', they will be taken straight to the relevant checklist for completion.

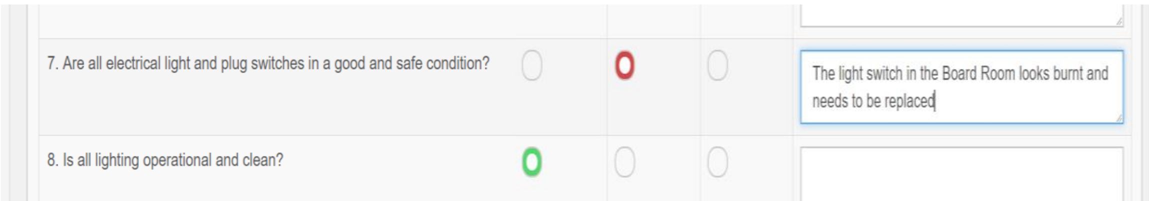


They can also go the Side Bar and ***CLICK*** on 'Task Manager' and 'My Tasks' which will show the below screen.

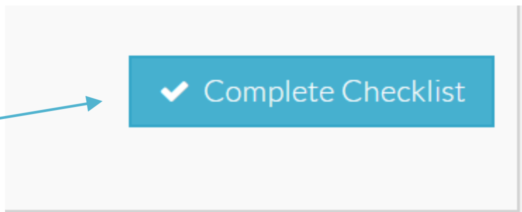
The same 'Chain Icon' can be seen indicating what is due now. If they ***CLICK*** on this 'Chain Icon', it will take them directly into the relevant checklist.



The assigned user now completes the checklist. While doing this they notice this issue;

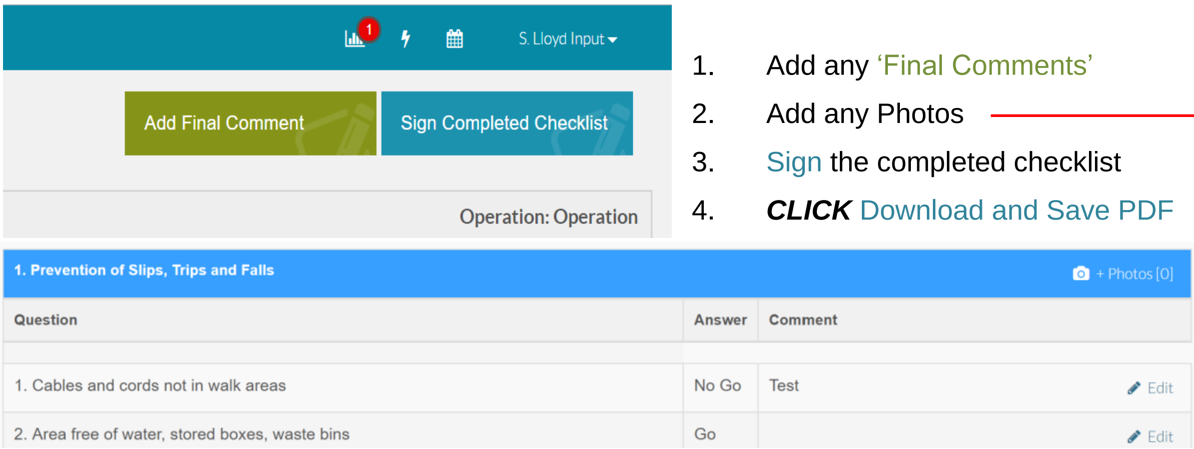


When they get to the end of the checklist, they ***CLICK*** the 'Complete Checklist Button'.



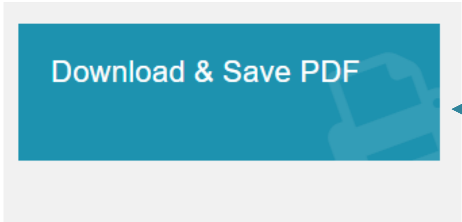
Recovery Partners

They then need to do 4 more things to complete their actions on the checklist which is done near the Top Bar.

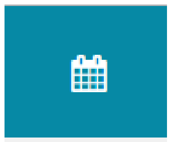


1. Add any 'Final Comments'
2. Add any Photos
3. Sign the completed checklist
4. ***CLICK*** Download and Save PDF

The downloaded document can be saved locally but it will auto save into the File Manager.



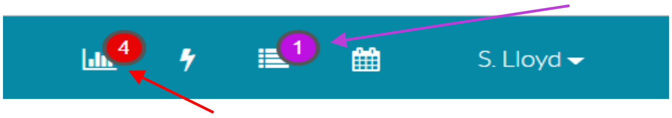
The user is finished and can now see they have no more items to complete as their task manager icon in the Top Bar now shows no numbers.



CONFIRMING THE TASK IS COMPLETE

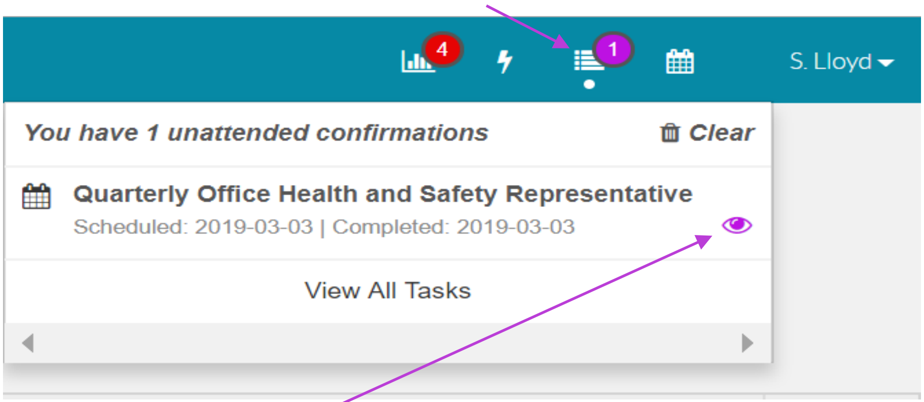
(Control and Standard Users)

The person that issued the task is now notified in the Top Bar that the task is complete in the Confirmation of Tasks icon. Note the numeral #1.

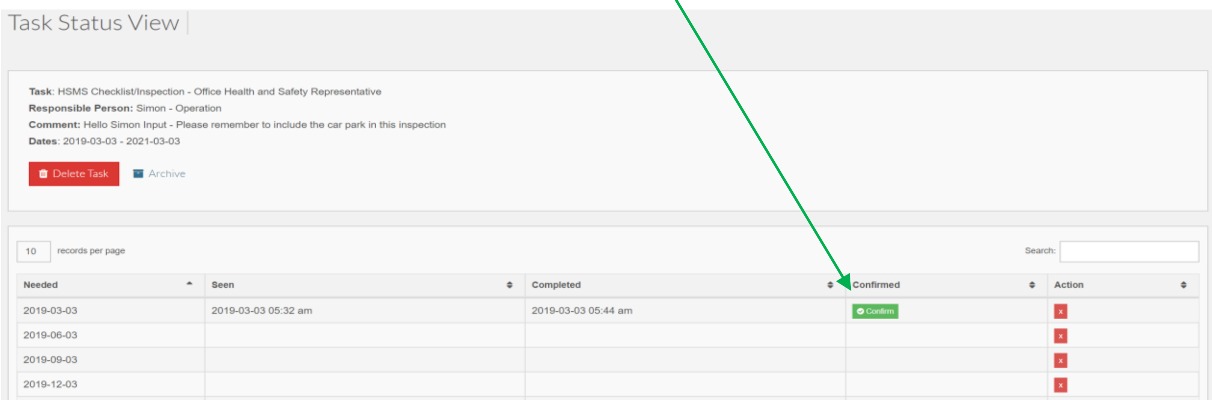


Also note the Status Report Icon has grown from 3 to 4. This is because the issue found in the checklist needs to be actioned from here.

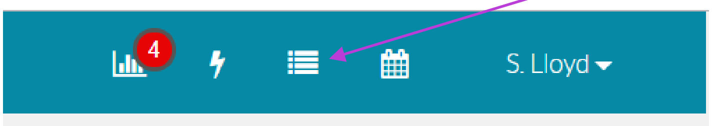
By ***CLICKING*** on the 'Confirmation of Tasks Icon' the following window opens.



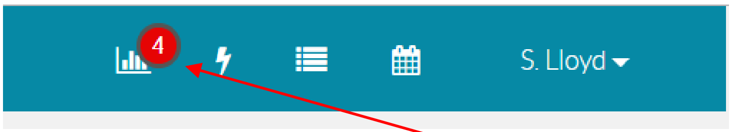
CLICK on the 'Eye' icon and get taken to your Task Status View. This tells you when the task was seen and when it was completed. Now ***CLICK*** 'Confirm' to close this task out. The system now knows that you have seen it is completed.



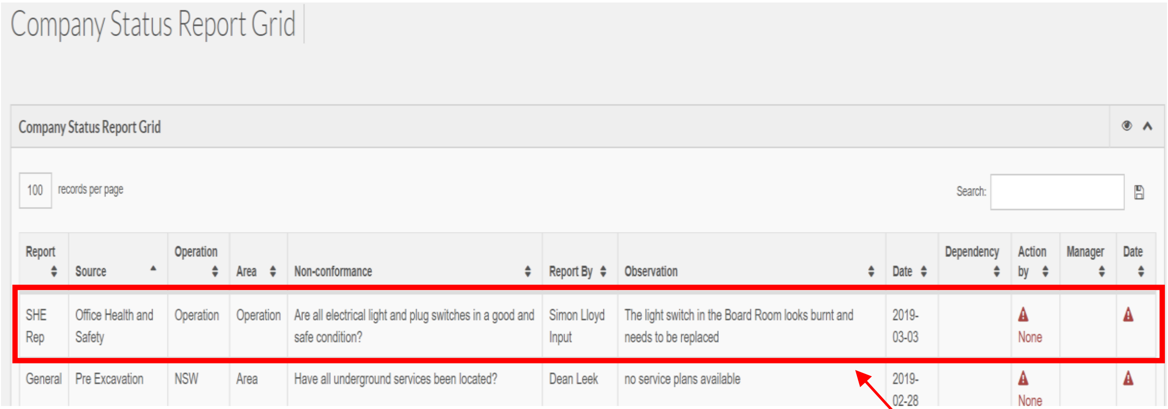
Your Top Bar will now show there are no more items to confirm.



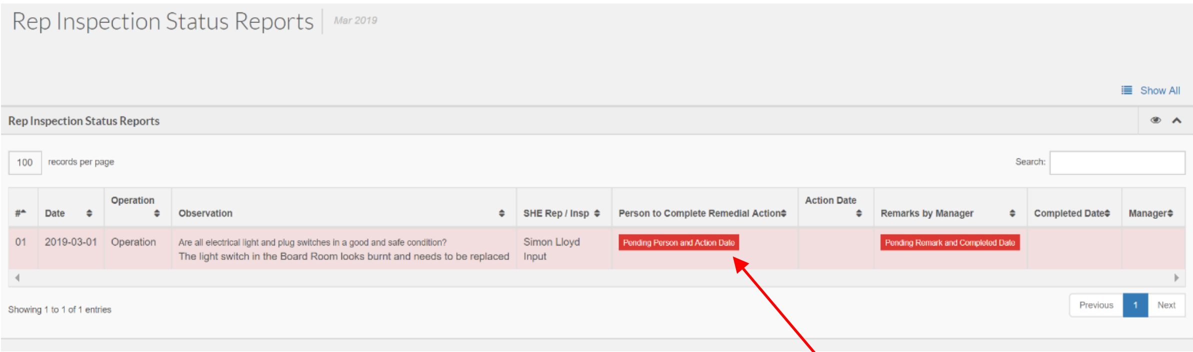
ACTIONING ISSUES FOUND DURING CHECKLISTS



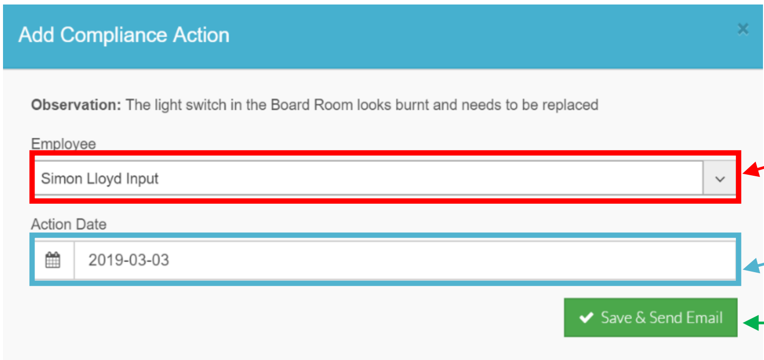
The ‘Status Report Icon’ now shows there are **4 items** outstanding. Let’s action the one found in the above example. ***CLICK*** the ‘Status Reports Icon’ which will take you into the ‘Status Report Grid’ (see below). This is your Corrective Action Register. Note the issue found above is logged at the bottom.



You can now assign who needs to go and implement the relevant control by ***CLICKING*** the ‘Action Box’. This will open a box allowing you to choose who will implement the control.



The chosen person and due by date can be added in the window by ***CLICKING*** ‘Pending Person and Action Date’.



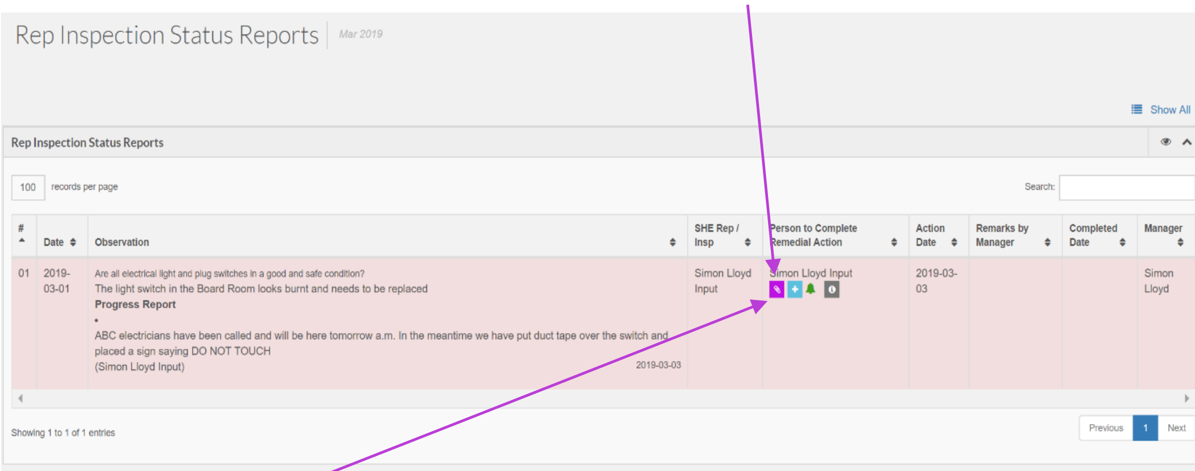
SELECT employee to action, then

SELECT action date, then

CLICK 'Save & Send Email'

They will now receive an email telling them to action this item. The person emailed will also get an alert in their Top Bar against their 'My Actions Icon'.

By clicking into the item requiring action, a window will open enabling the person who needs to action this item to enter relevant information. The 'Paper Clip Icon' allows for progress reports.

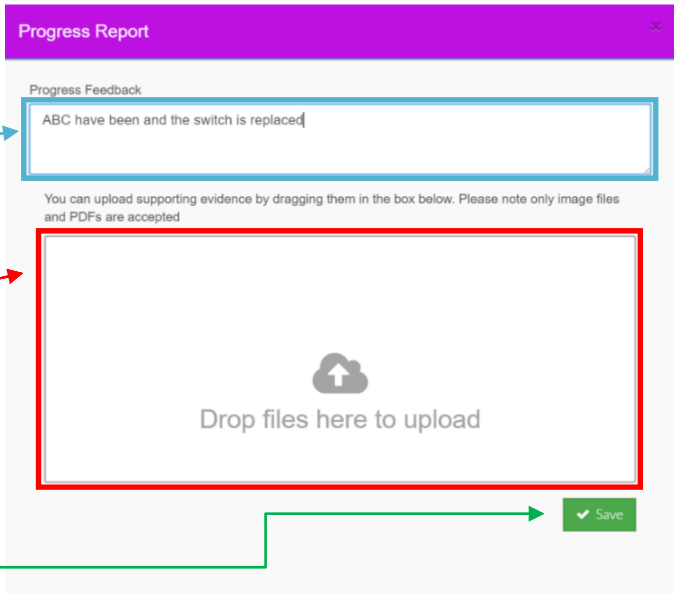


CLICK the 'Paper Clip Icon' to open the Progress Report window.

TYPE any comments re. the progress of the item requiring action.

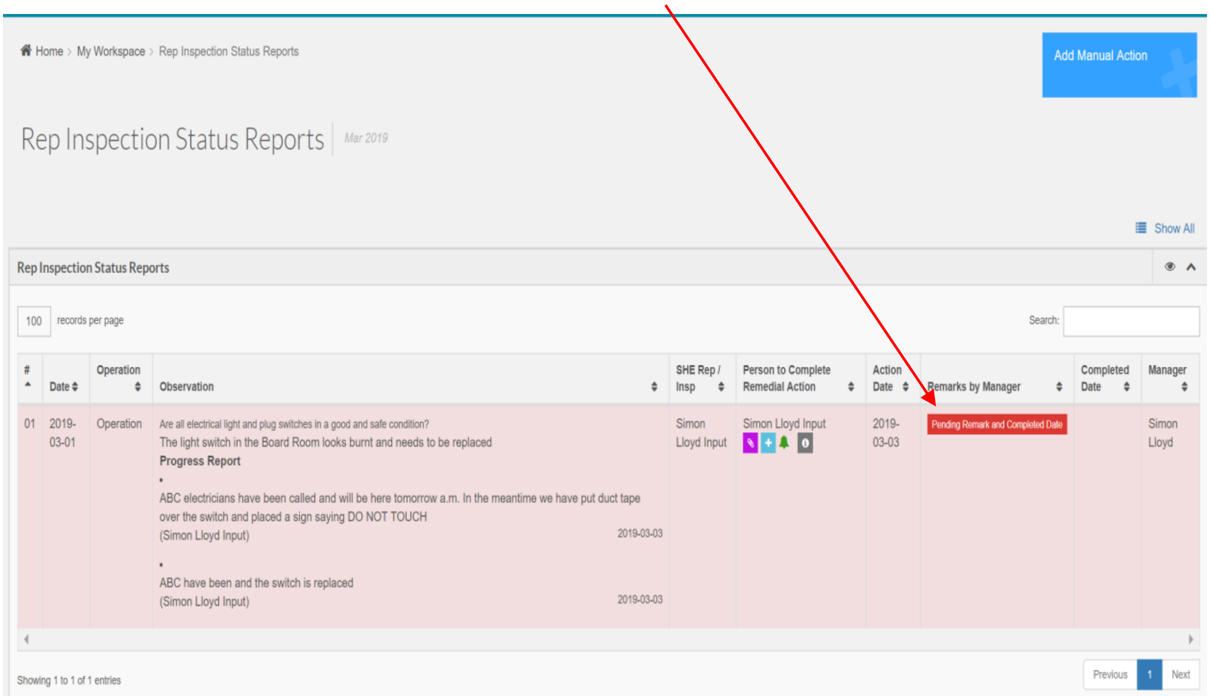
If required, ***ADD PHOTOS or PDFs*** by dragging and dropping or clicking on the window and locating images within the users computer/phone.

CLICK 'Save' to add the progress report.

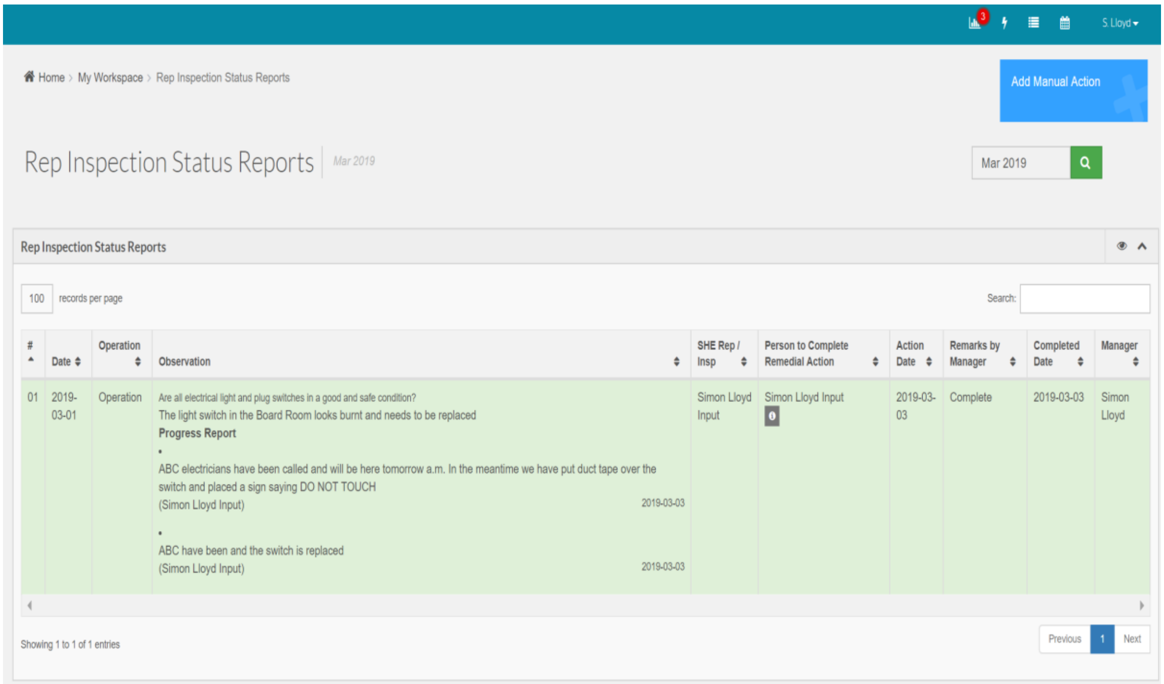


CLOSING THE ISSUE OUT

The manager of the relevant area can now verify the action is complete and close out the issue with any comments by ***CLICKING*** 'Pending Remark and Completion Date'.



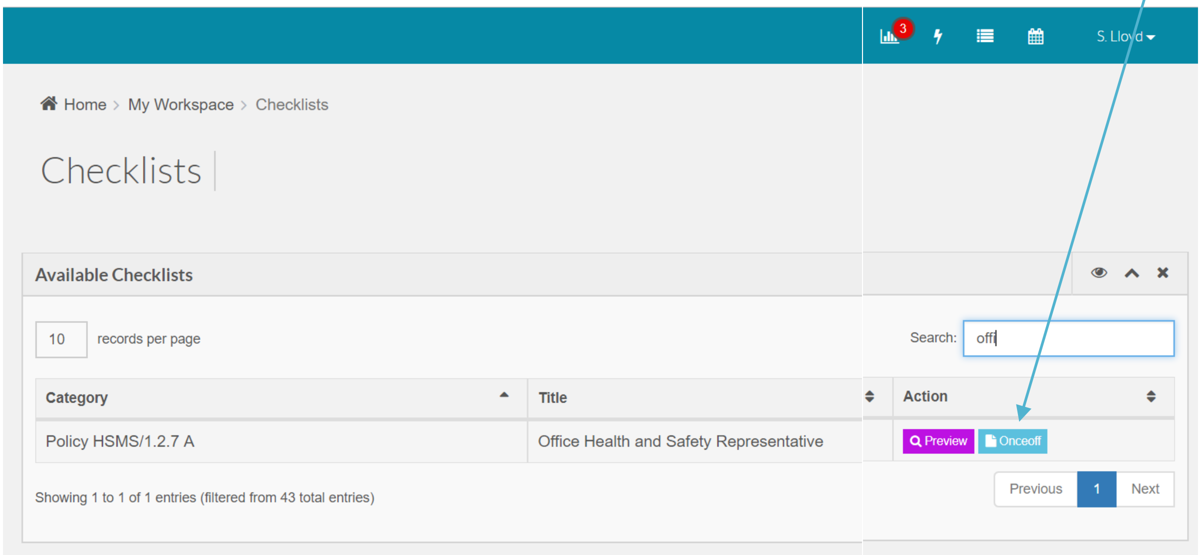
The item now changes to green in color indicating it has been closed out and the Top Bar will show the Corrective Actions icon reduce from 4 back to 3.



ONCE OFF (RANDOM) CHECKLIST COMPLETION

There will be occasions where you don't want to 'task' someone to complete a checklist and want to complete it yourself. For that matter anyone can do this if they are concerned or simply being diligent.

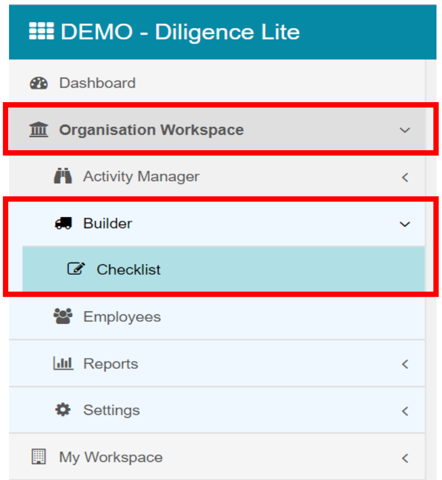
Follow the instructions on page 14 and 15 to locate your checklist, and simply ***CLICK*** the 'Once Off' button to begin the checklist.



BUILD YOUR OWN CHECKLIST

(Control Users Only)

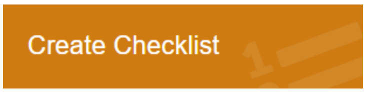
You can build your own checklists for any purpose easily. It will instantly integrate with the system and behave exactly like the examples all shown previously in this guide. Only Control Users can build checklists as we want any process used by your business to be tightly controlled.



CLICK into 'Organisational Workspace', then

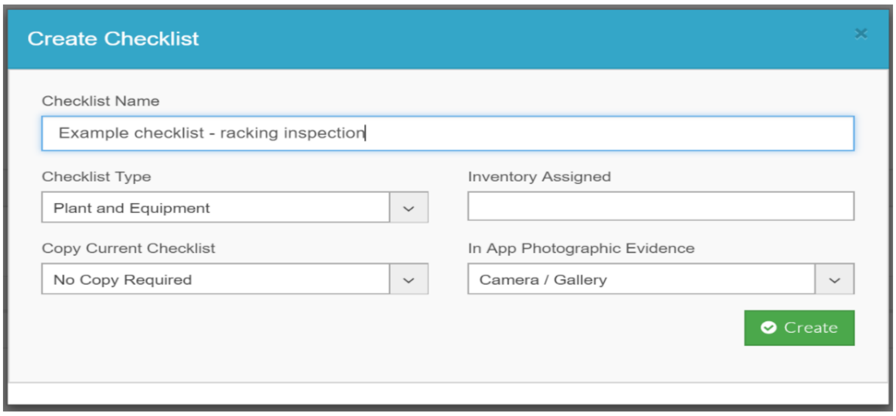
CLICK into 'Builder', then

CLICK 'Checklist'.



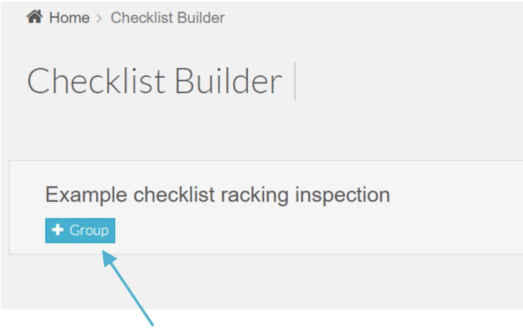
CLICK 'Create Checklist' orange button located in top right.

This window will now appear;



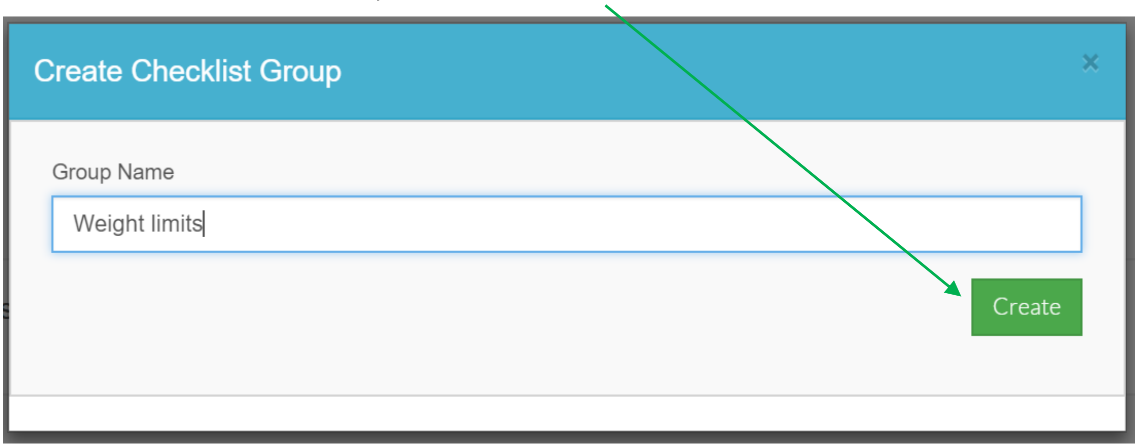
1. ***ENTER*** the title of your checklist
2. ***SELECT*** checklist type - what part of the system is most relevant to this checklist?
3. Inventory (leave this until later)
4. Copy current checklist – you will only do this if you are creating a checklist that is very similar to an existing checklist – let's assume here that you don't so leave as No Copy required
5. In App Evidence – leave as Camera/gallery – this allows you to add photos to the inspection
6. ***CLICK*** the 'Create' button.

This will take you to the Build area, where you can start adding Groups and Questions.

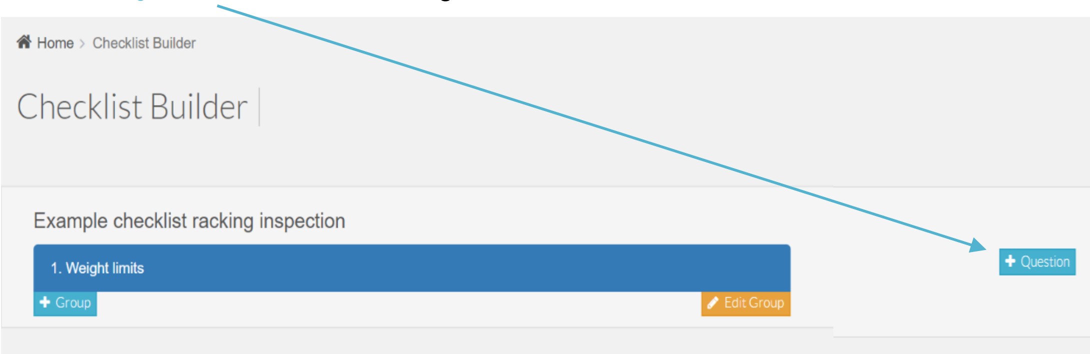


CLICK '+ Group' button and a popup window will appear, seen below

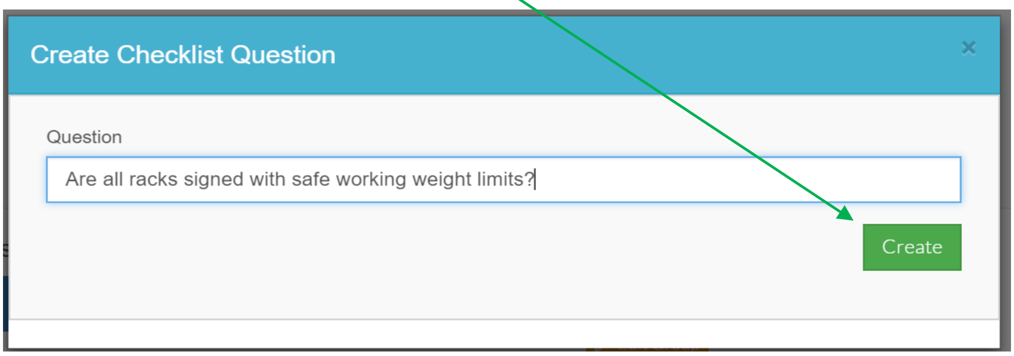
ENTER the Name of the Group and ***CLICK*** 'Create'



CLICK '+ Question' button on the right-hand side of screen

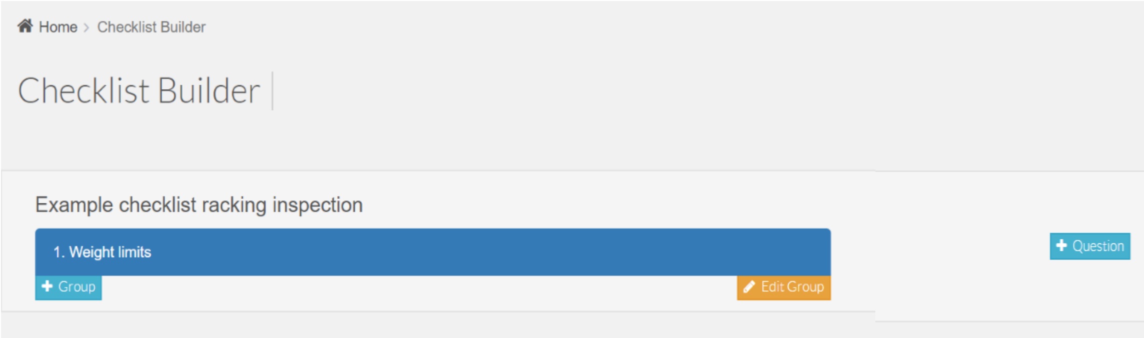


TYPE your first question and ***CLICK*** 'Create'

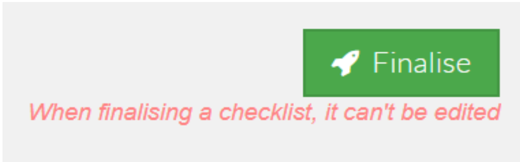


Keep adding questions the same way that relate to that Group.

When you get to the next group ***CLICK*** the '+ Group' button again, then the '+ Question' button and repeat until you have completed the checklist build.

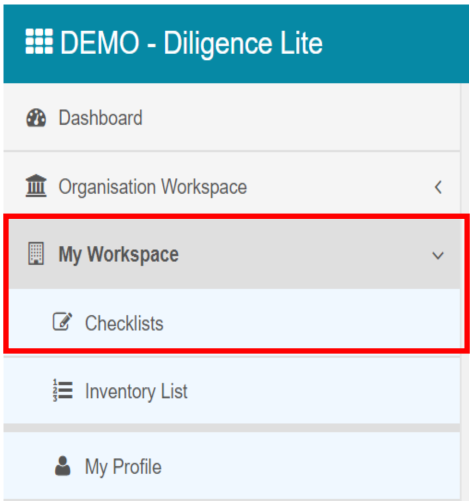


Finalise the Checklist by ***CLICKING*** the green 'Finalise' checklist button.



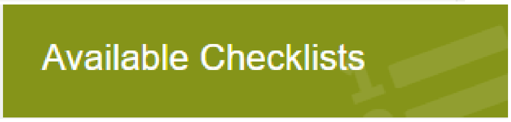
Nice – your first checklist created! This will be saved with all the other checklists in the system.

You can locate it like we showed you on page 14 and 15.

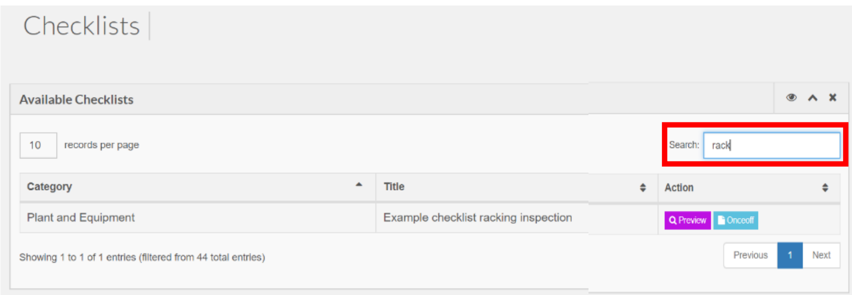


CLICK into 'My Workspace, then

CLICK 'Checklists



CLICK the green 'Available Checklists' button located in in top right of page.



Use the search function to find checklist and then treat like any other checklist activity shown previously in this guide.

USING THE APP

(In the future)

Checklists can easily be done using your mobile phone or other supporting device. You will need to download the APP from the iTunes or Android store dependent on what type of device you have.

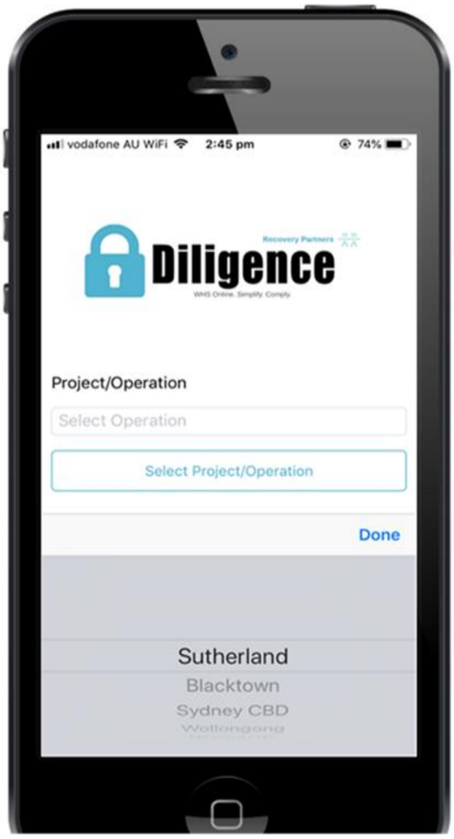
At this stage we just want you to know there is an APP. We will get you access to this once you understand how the system works. This will make it easy to understand what happens to the information captured by the mobile devices…

Completing Checklists

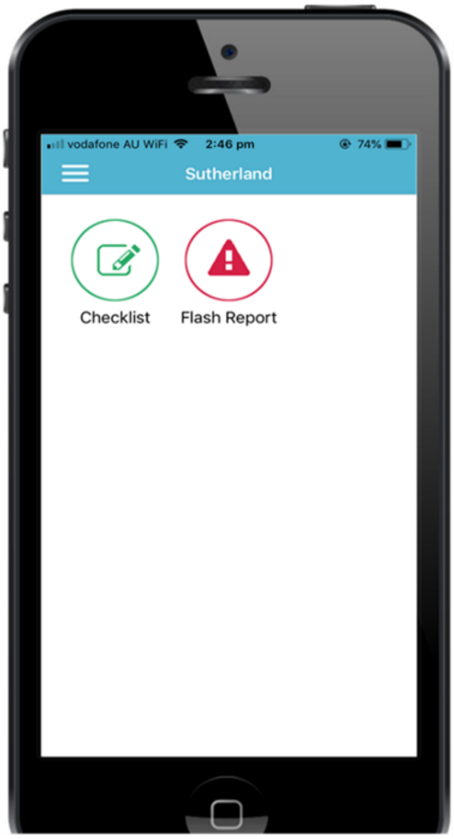
Steps:

1. ***OPEN*** the App and Login.

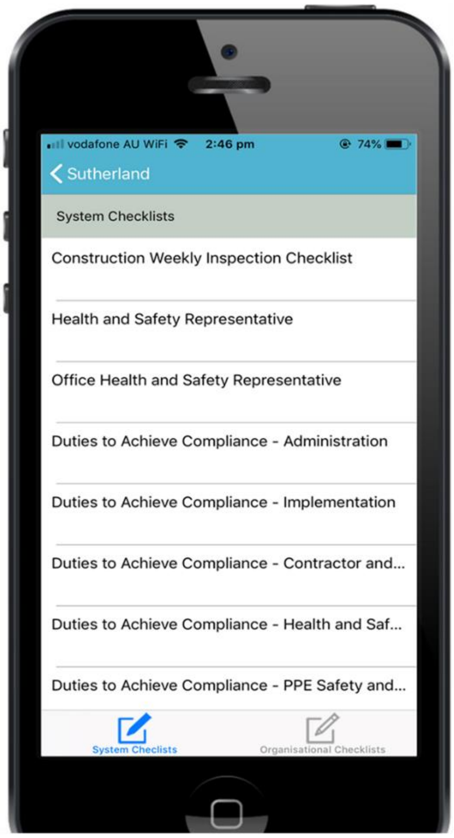
2. ***SELECT*** an ‘Operation’.



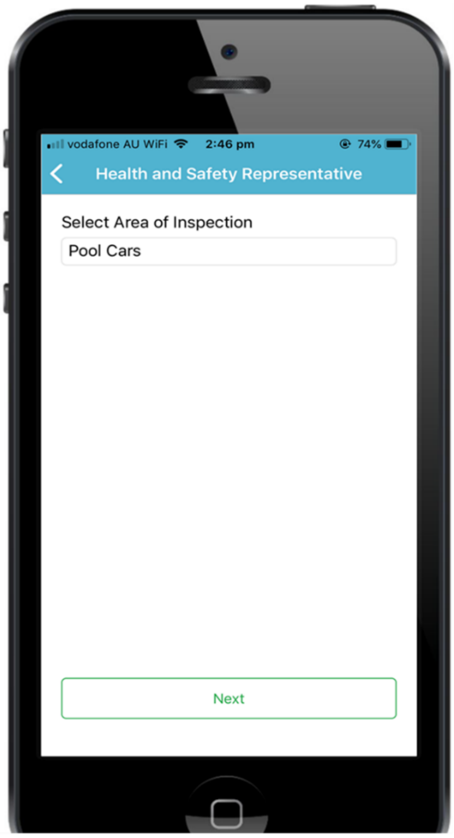
3. ***TAP*** 'Checklist Icon'.



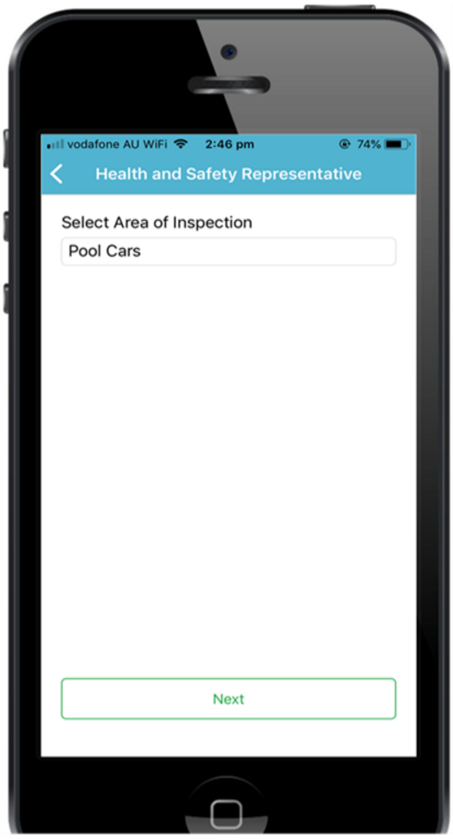
4. ***FIND*** and ***SELECT*** the checklist.



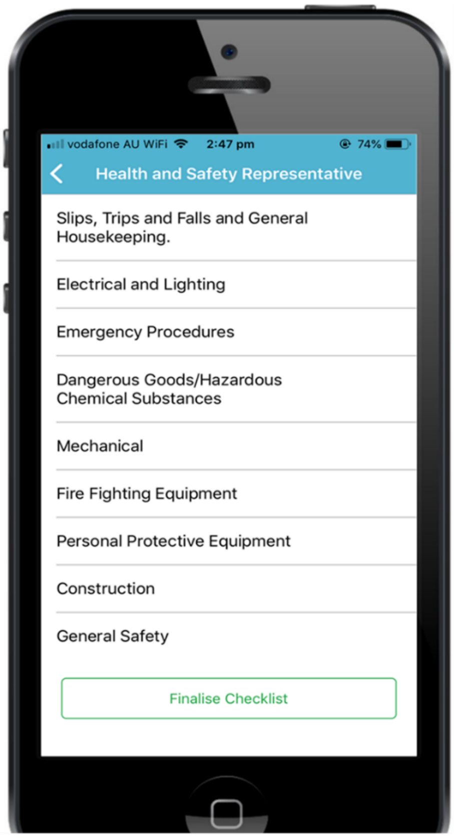
5. ***SELECT*** 'Area' of Inspection.



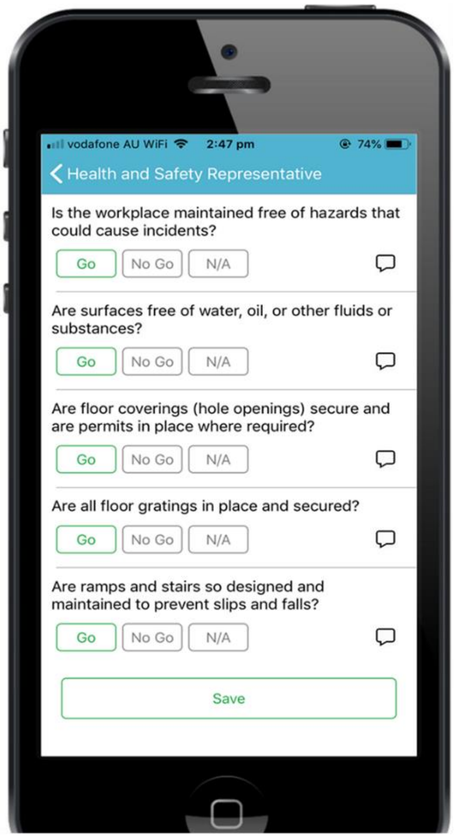
6. ***TAP*** 'Next' to commence checklist.



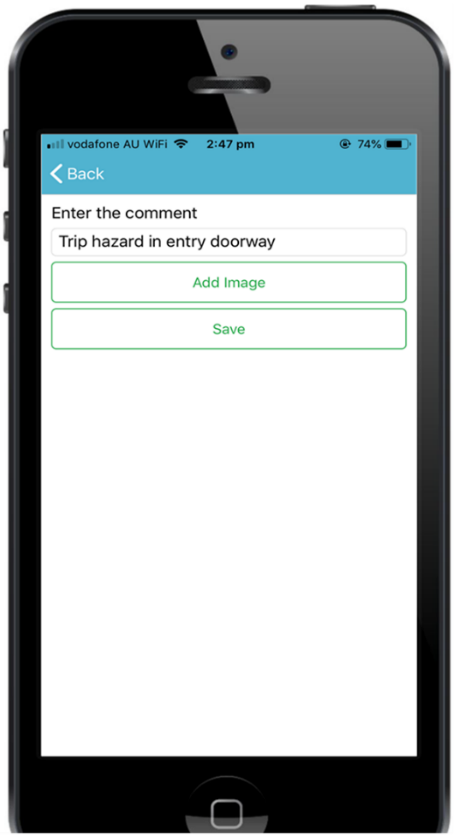
7. ***TAP*** on an inspection ‘Group’.



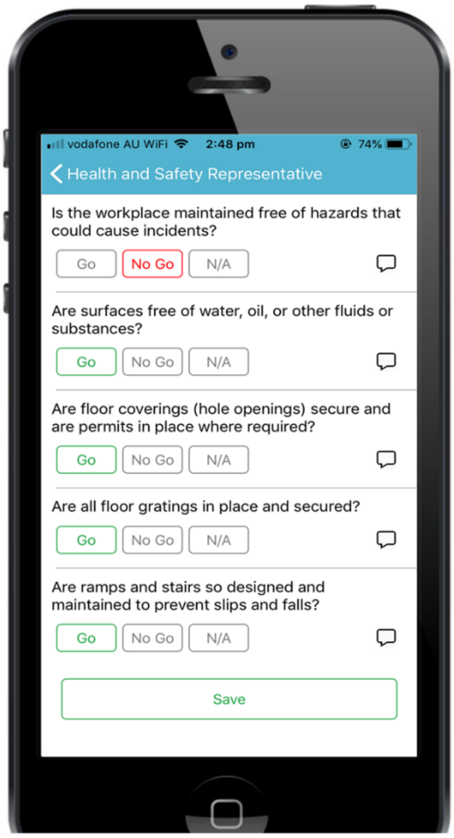
8. ***SELECT*** **‘Go’**, **‘No Go’** or **‘N/A’**.



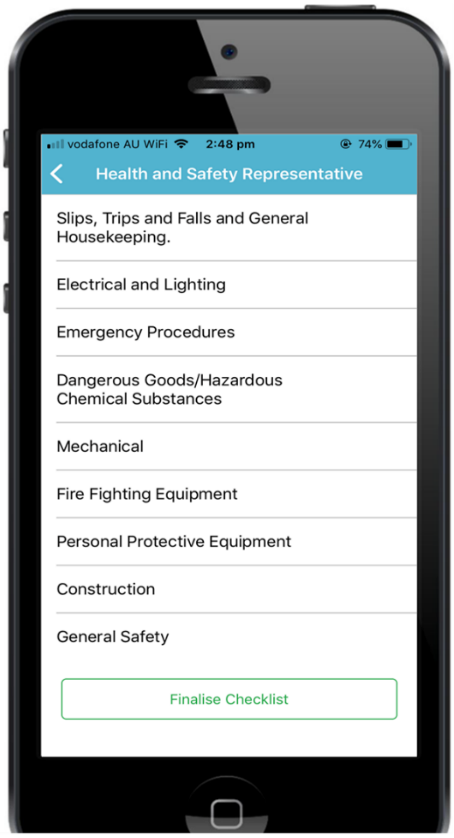
9. If **‘No Go’** is selected, ***WRITE*** a comment, ***ADD*** any images and ***TAP*** ‘Save’.



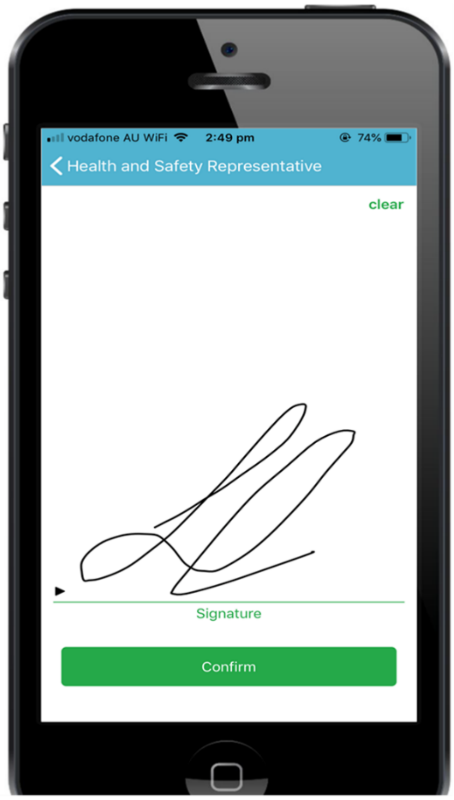
10. Continue process for each item in the group, then ***TAP*** ‘Save’.



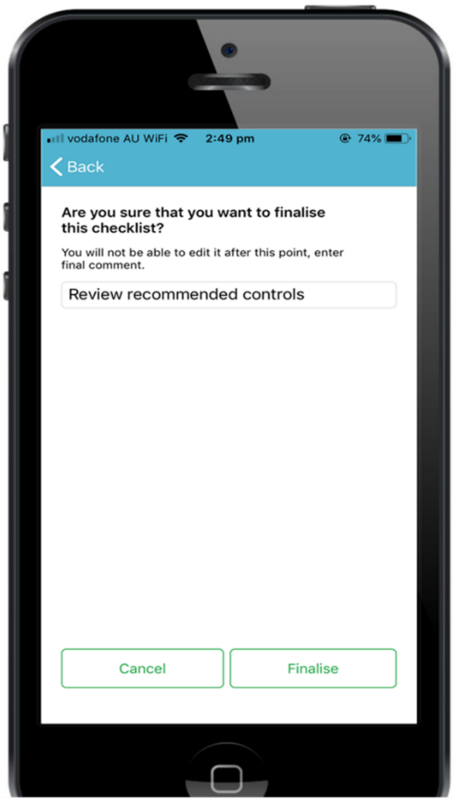
11. Continue process for each inspection ‘Group’, then ***TAP*** ‘Finalise Checklist’.



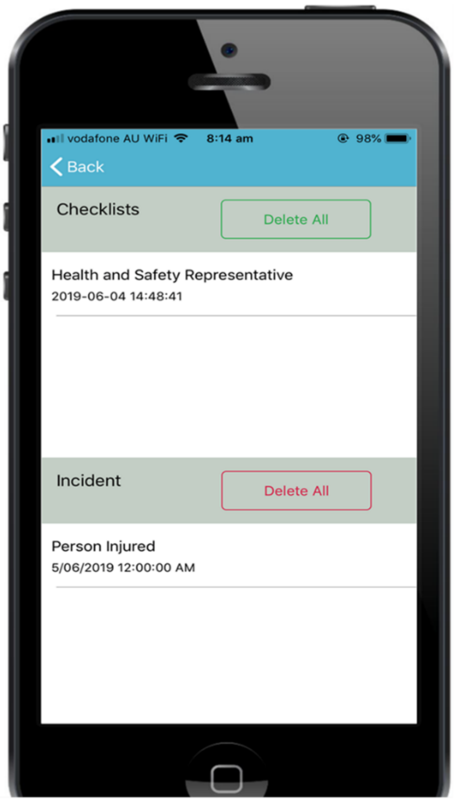
12. ***SIGN*** completed checklist by drawing with your finger, then ***TAP*** ‘Confirm’.



13. ***WRITE*** any comments and then ***TAP*** the green ‘Finalise’ button.



14. ***TAP*** on the checklist, then ***TAP*** ‘Upload’ on the pop-up that appears. Done!

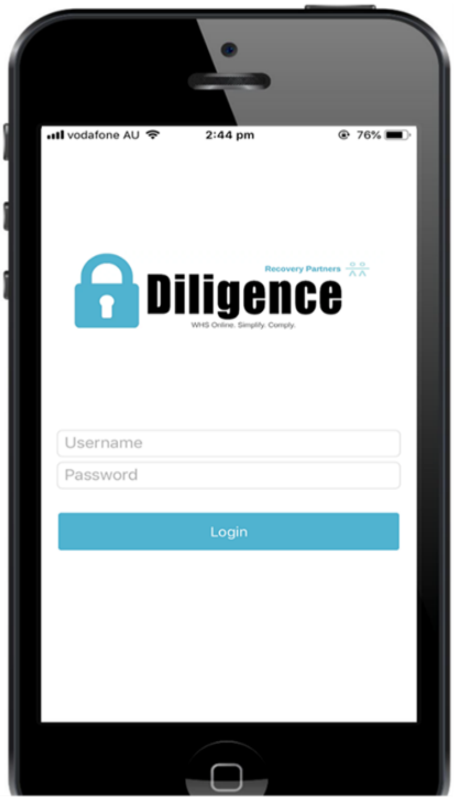


This step uploads the checklist and results to the web-based Diligence platform.

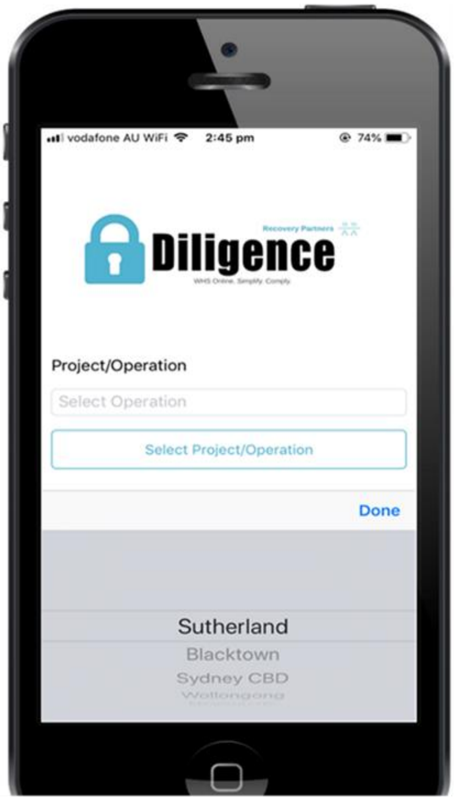
Incident Reporting – Flash Report

Steps:

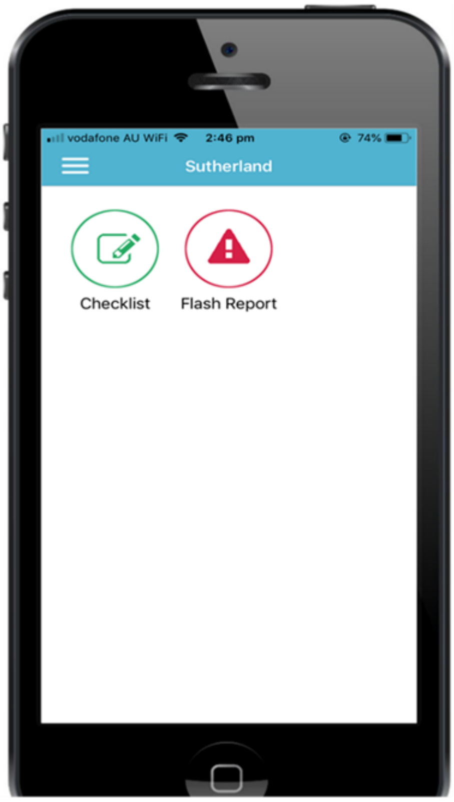
1. ***OPEN*** the App and Login.



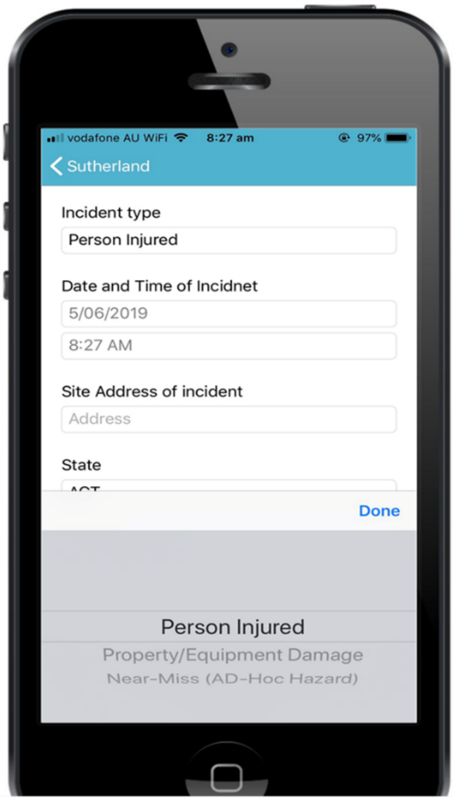
2. ***SELECT*** an 'Operation'.



3. ***TAP*** 'Flash Report Icon'.



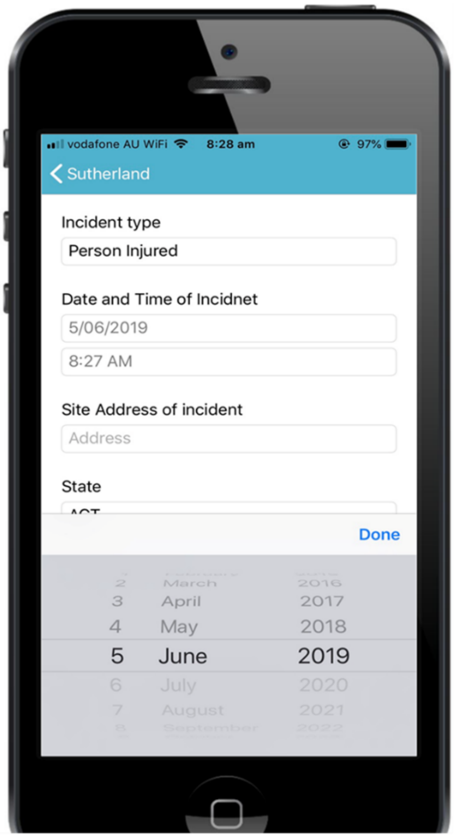
4. ***SELECT*** 'Incident Type'.



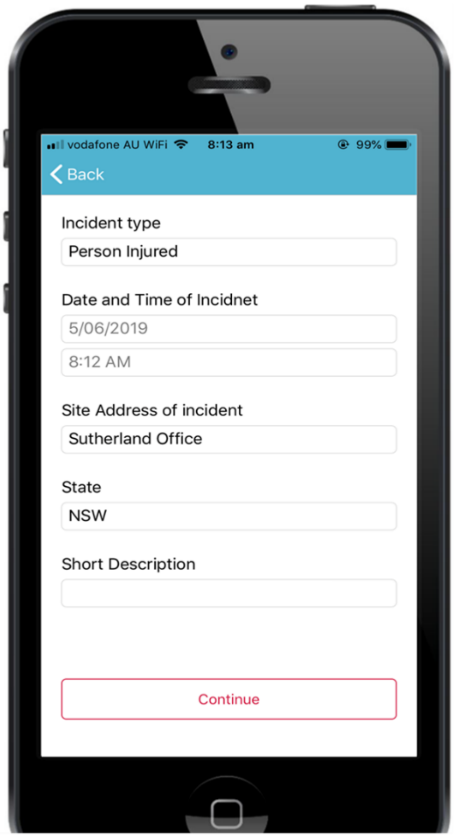
Note other report types:

- *Person Injured (Incident)*
- *Property Damage (Accident)*
- *Near Miss (Ad Hoc Hazard)*

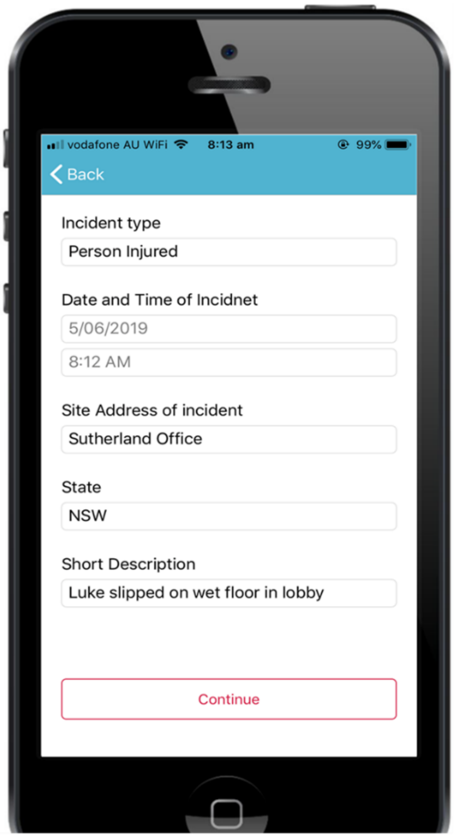
5. ***SELECT*** 'Date & Time' of incident.



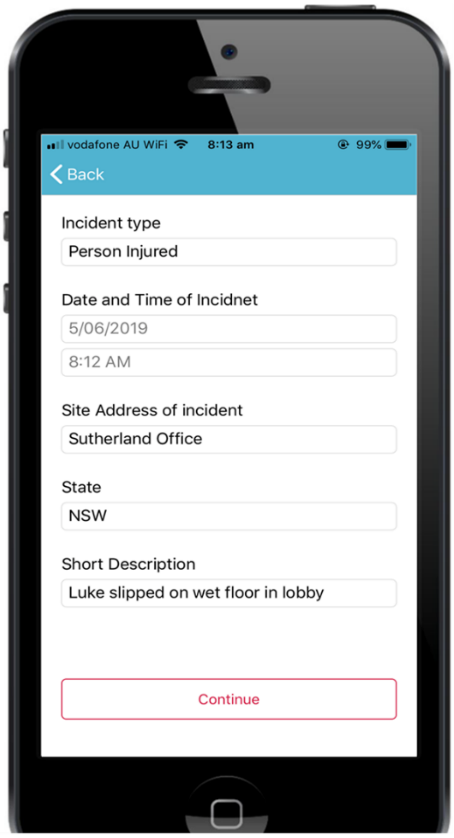
6. ***ENTER*** 'Site Address' & 'State' of incident.



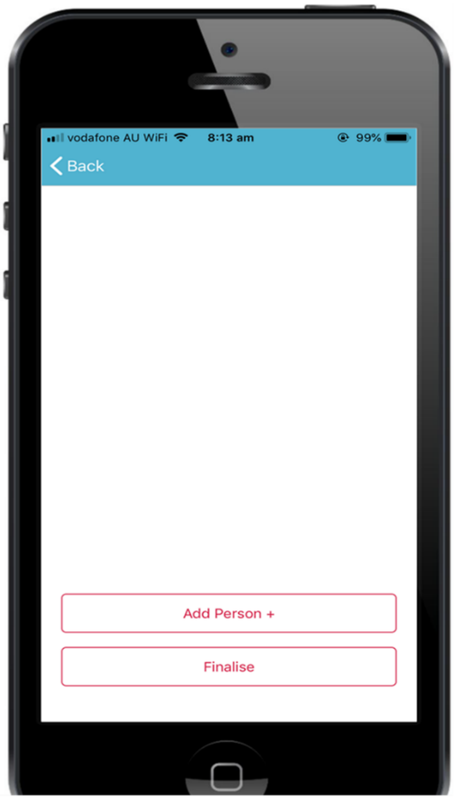
7. ***WRITE*** a 'Short Description'.



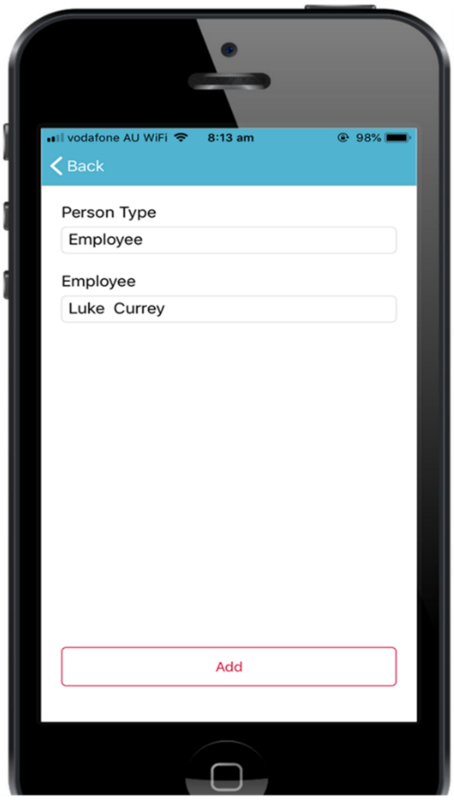
8. ***TAP*** the 'Continue' button.



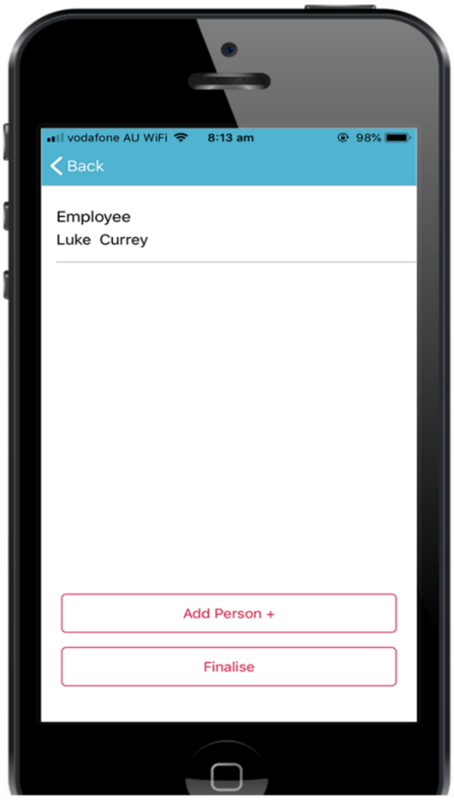
9. ***TAP*** 'Add Person +' to add involved parties or witnesses.



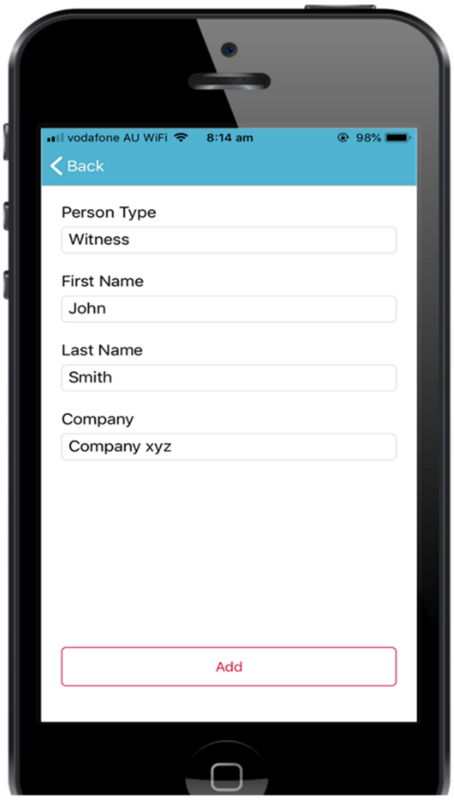
10. ***TAP*** 'Person Type', ***SELECT*** 'Employee', ***SELECT*** name of person and ***TAP*** 'Add'.



11. ***TAP*** 'Add Person +' to add more involved parties or witnesses.

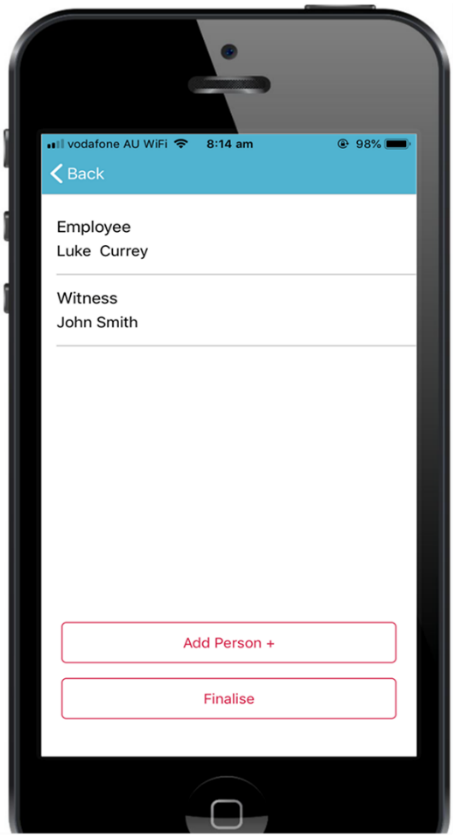


12. ***TAP*** 'Person Type', ***SELECT*** 'Witness', ***TYPE*** name of person and ***TAP*** 'Add'.

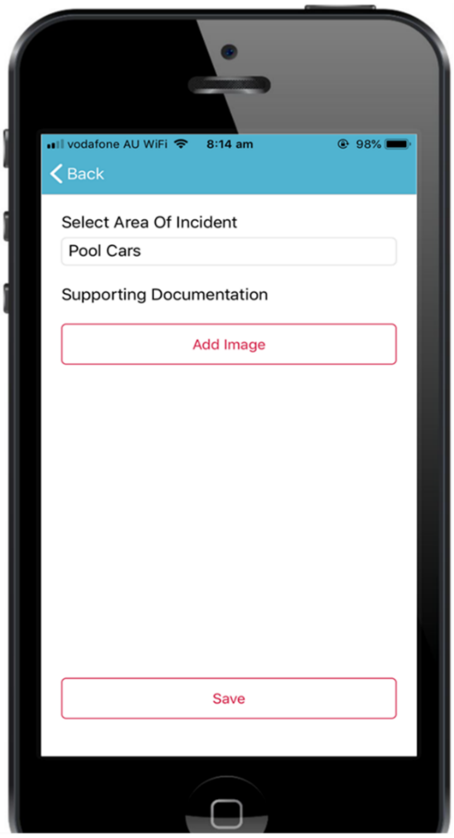


13. Continue to add involved parties, once complete, ***TAP*** the 'Finalise' button.

We can now see both involved parties have been added to report.

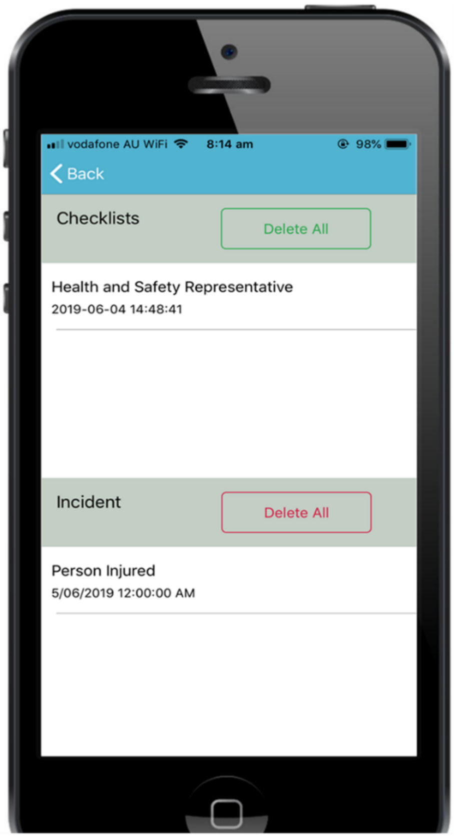


14. ***SELECT*** 'Area of Incident', add images by ***TAPPING*** 'Add Image', then ***TAP*** 'Save'.

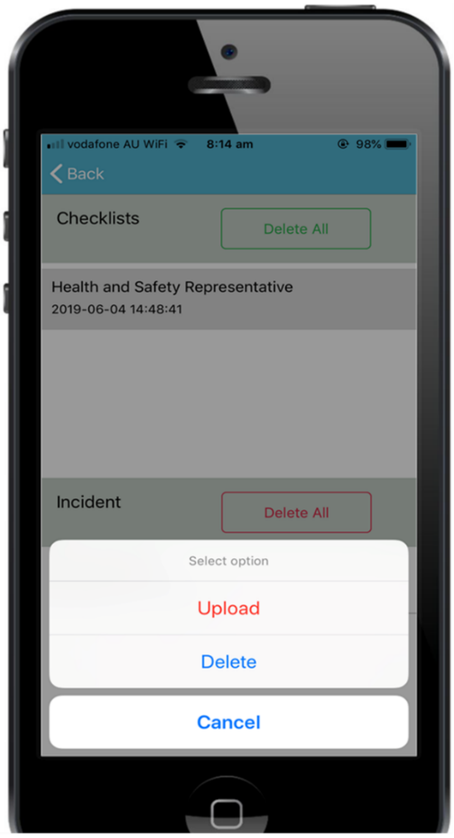


15. ***TAP*** on 'Person Injured'.

The report is now completed but only saved on our phone.



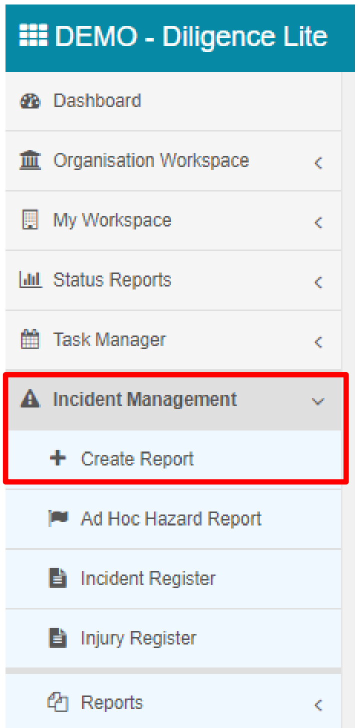
16. ***TAP*** 'Upload' and the Report is Done!



This step uploads the incident to the web-based Diligence platform.

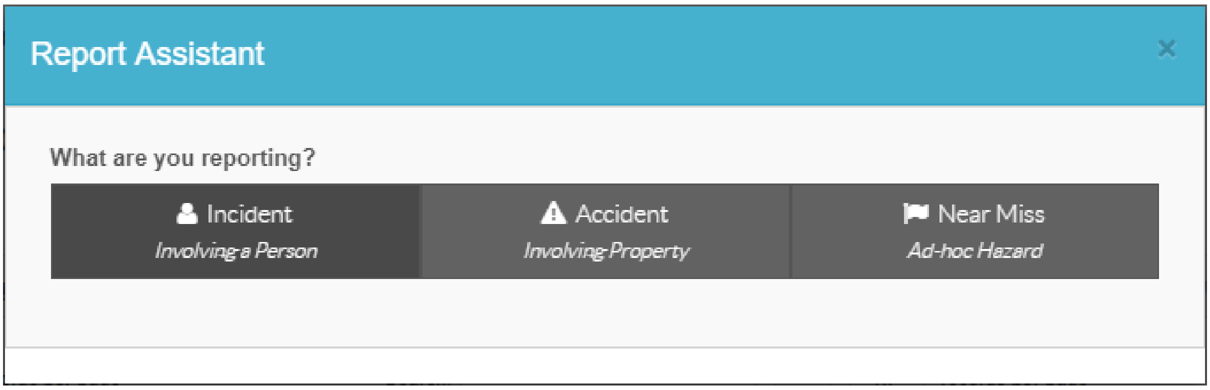
INCIDENT MANAGEMENT

Incidents can be stressful for all involved. Diligence makes the reporting process a lot easier. If an incident occurs in your workplace, follow this process:



CLICK into ‘Incident Management’ (side Bar), then ***CLICK*** on ‘Create Report’.

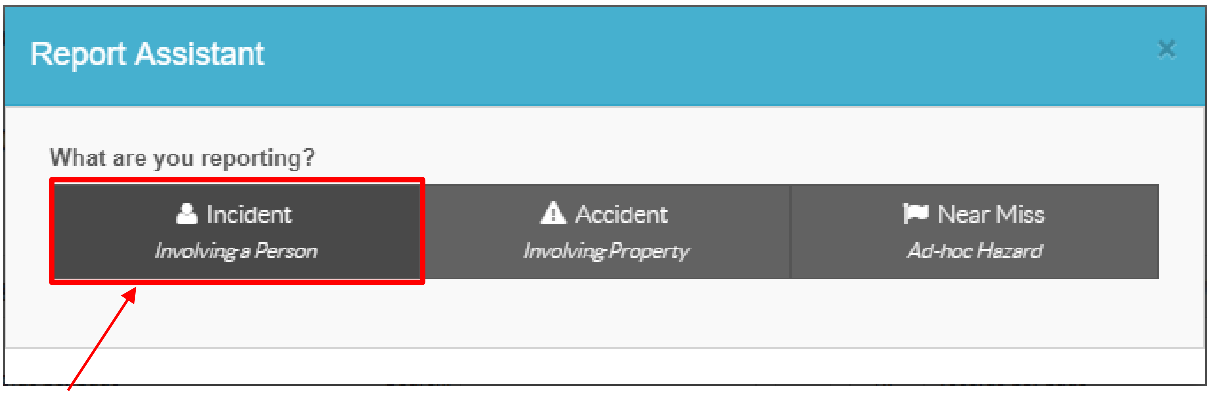
This will open a pop-up window.



Decide on type of incident:

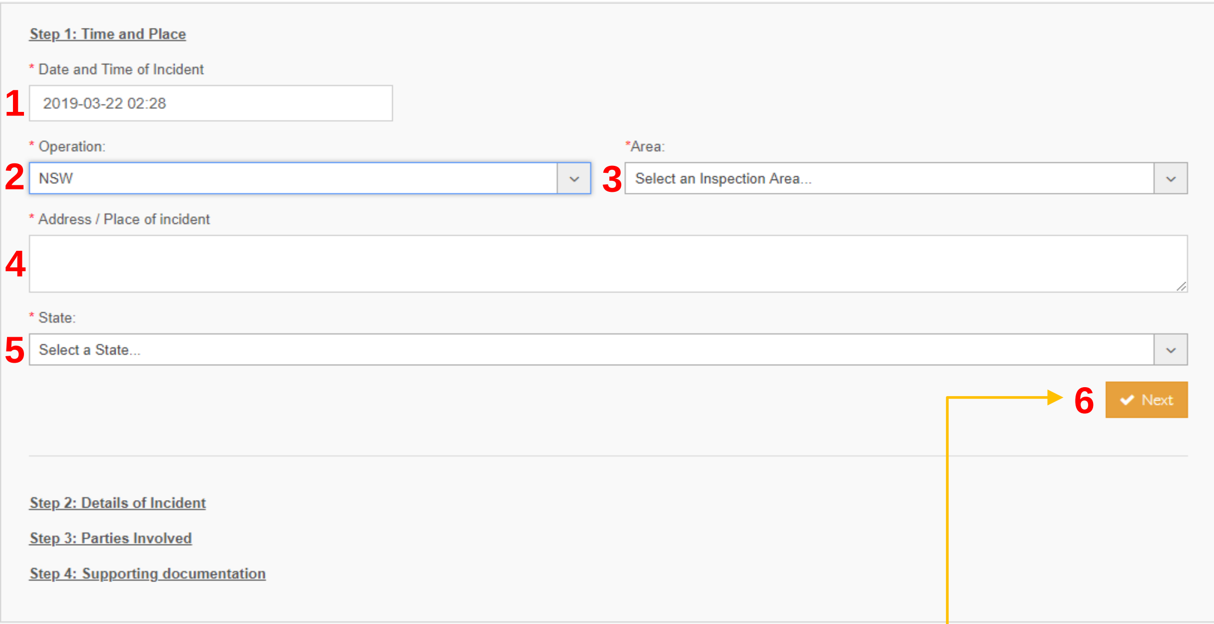
1. **Incident:** Involving a person
2. **Accident:** Involving Property
3. **Near Miss:** Ad-hoc hazard which could of resulted in an accident or incident, but didn’t.

For the purpose of this part of the user manual we are going to select Incident.



CLICK on ‘Incident’.

Upon ***CLICKING*** ‘Incident’, a new page will appear (as seen below)

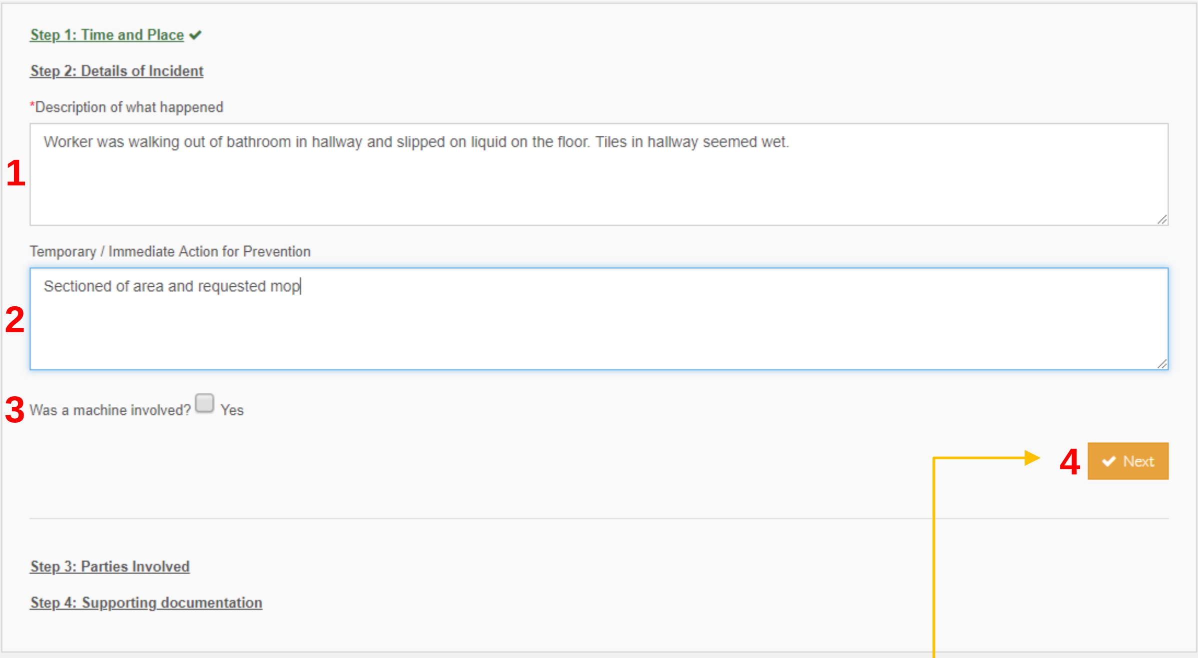


Step 1: Time and Place

INPUT the details requested;

1. Time and date of incident
2. Operation
3. Area
4. Type address into Address/place of incident
5. State
6. ***CLICK*** on the orange ‘Next’ button (bottom right of page)

Upon ***CLICKING*** 'Next', a new page will appear (as seen below)

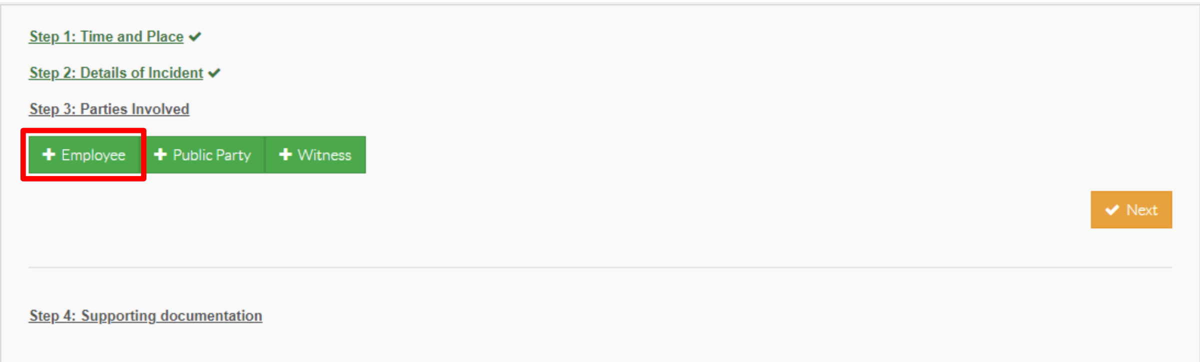


Step 2: Details of Incident

Same as before, ***INPUT*** the details requested;

1. Description of what happened
2. Temporary / Immediate action for Prevention
3. Decide if machinery was involved, if so, click the checkbox
4. ***CLICK*** on the orange 'Next' button (bottom right of page)

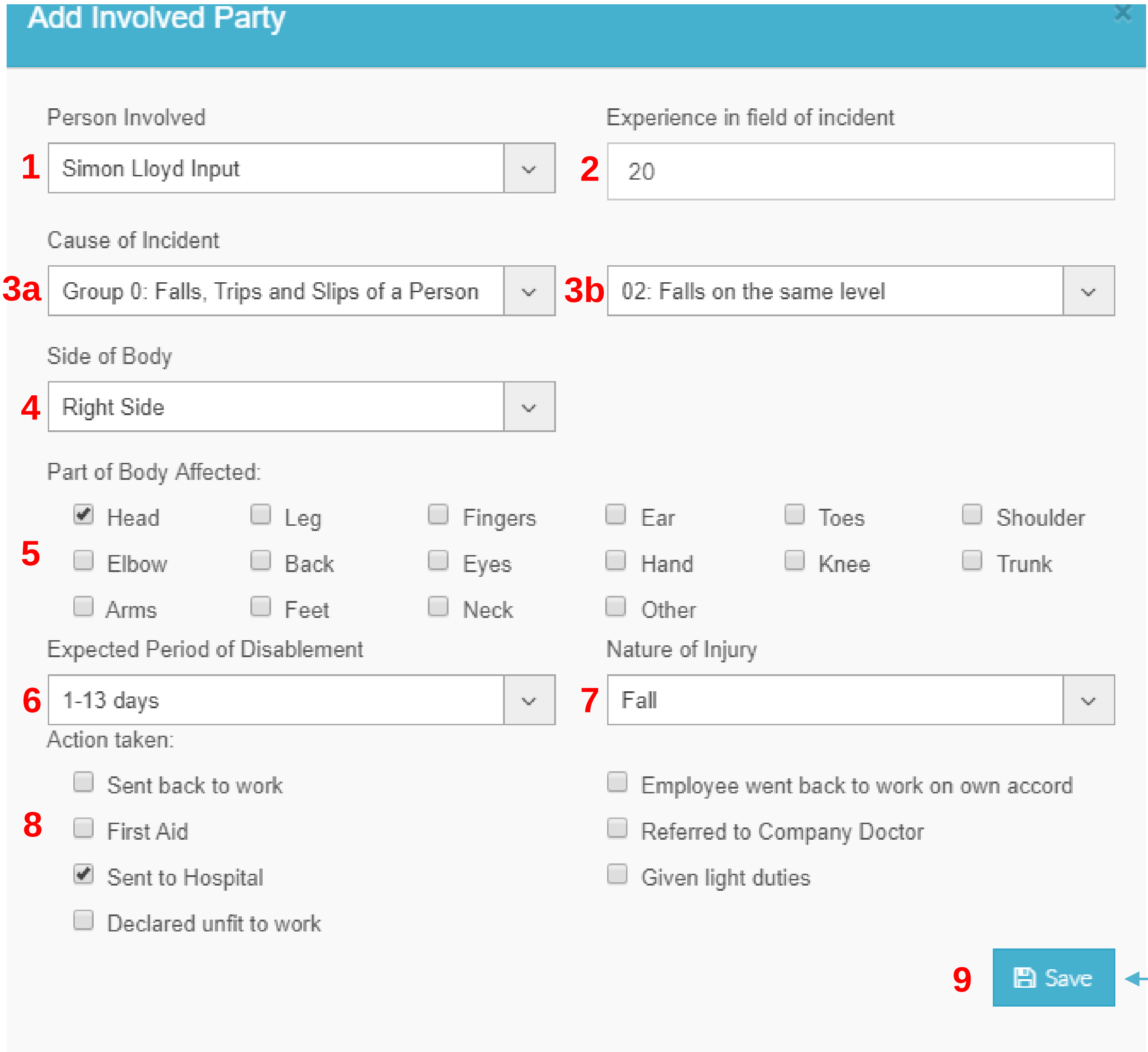
Upon ***CLICKING*** 'Next', a new page will appear (as seen below)



Step 3: Parties Involved

Step 3 involves gathering details about the individual involved in the incident (injured worker), any members of public if involved in the incident or any witnesses to the incident. For the purpose of this user guide, we will click Employee, enter injury details, and then later click witness, and enter any witness details we have gathered.

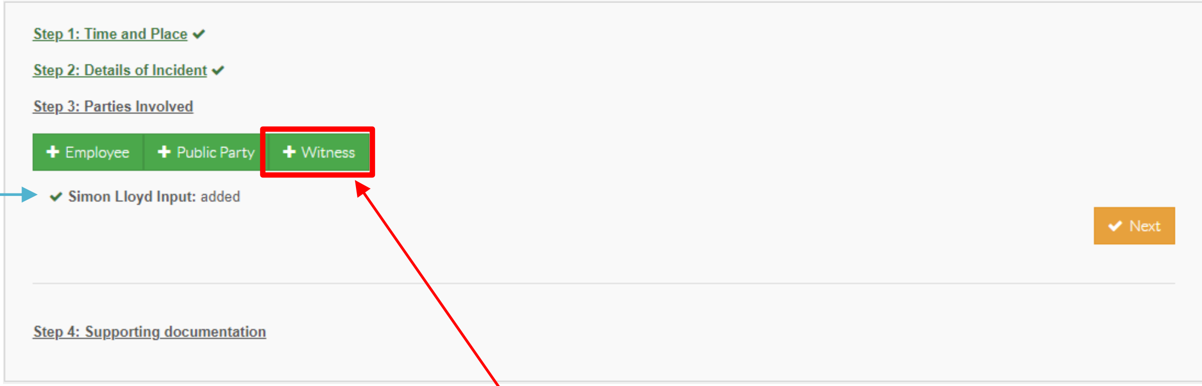
Upon ***CLICKING*** 'Employee', a pop-up will appear (as seen below)



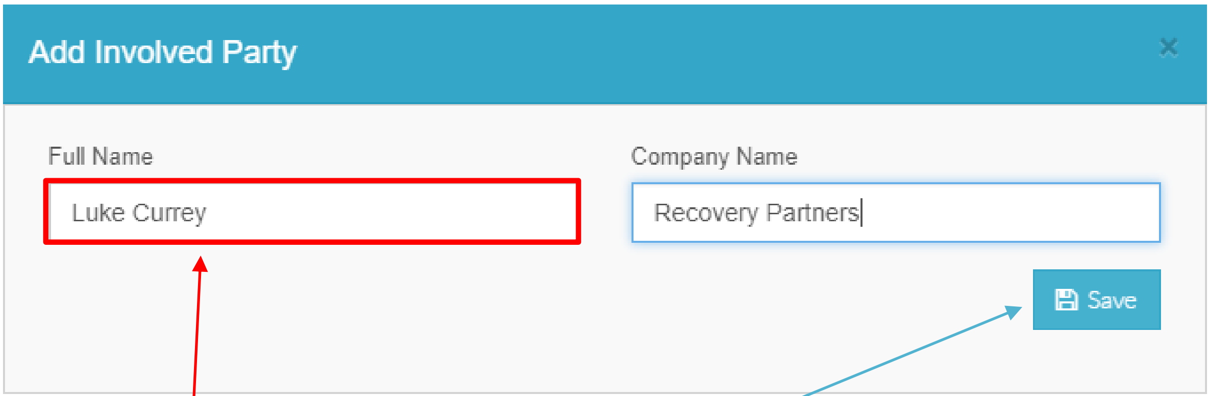
Same as before, ***INPUT*** the details requested;

1. Person involved
2. How many years' experience does this employee have
3. Cause of incident
    a. After entering a cause, a second drop down selection will appear
    b. Select an option within that drop down
4. Side of body affected
5. Part of body affected
6. Expected period of disablement
7. Nature of injury i.e. laceration, bruising sprains etc.
8. Action taken
9. ***CLICK*** on the blue 'Save' button (bottom right of page)

Upon ***CLICKING*** 'Save', it will return to the previous screen, and you should be able to now see the 'Employee' has been added (as seen below).

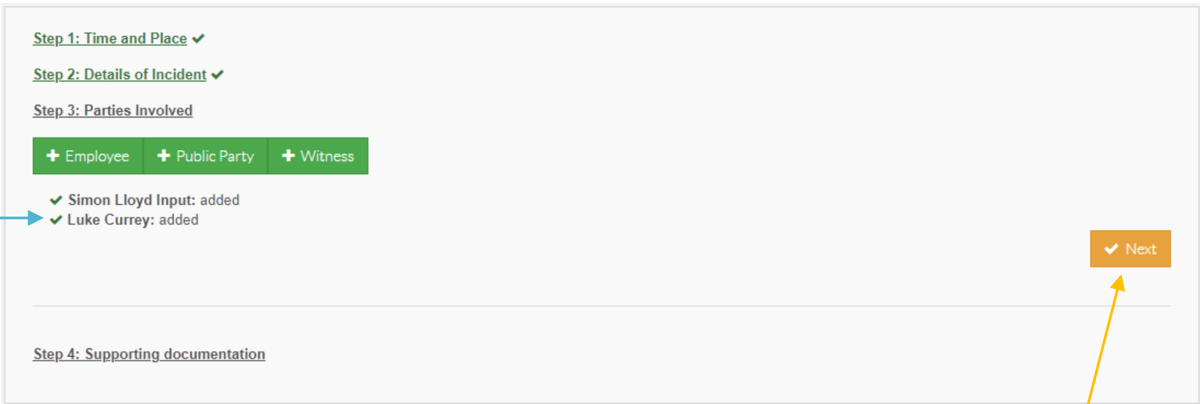


Now let's add any witnesses, ***CLICK*** on 'Witness'. After ***CLICKING*** 'Witness', a pop-up will appear (as seen below).



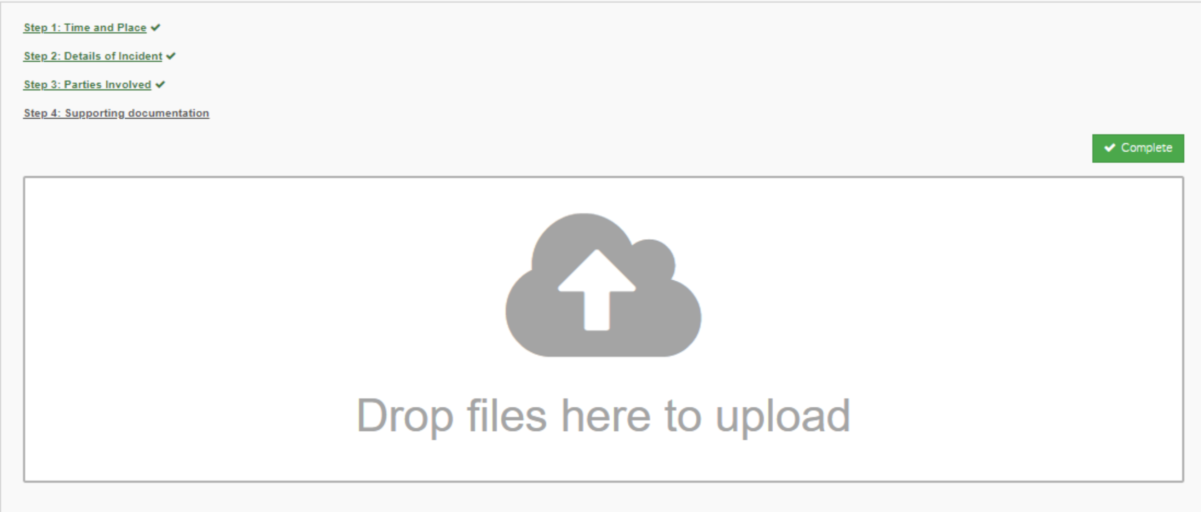
ENTER the details of the witness and ***CLICK*** the 'Save' button.

After ***CLICKING*** 'Save', it will return to the previous screen, and you should now be able to see the 'Witness' has been added (as seen below).



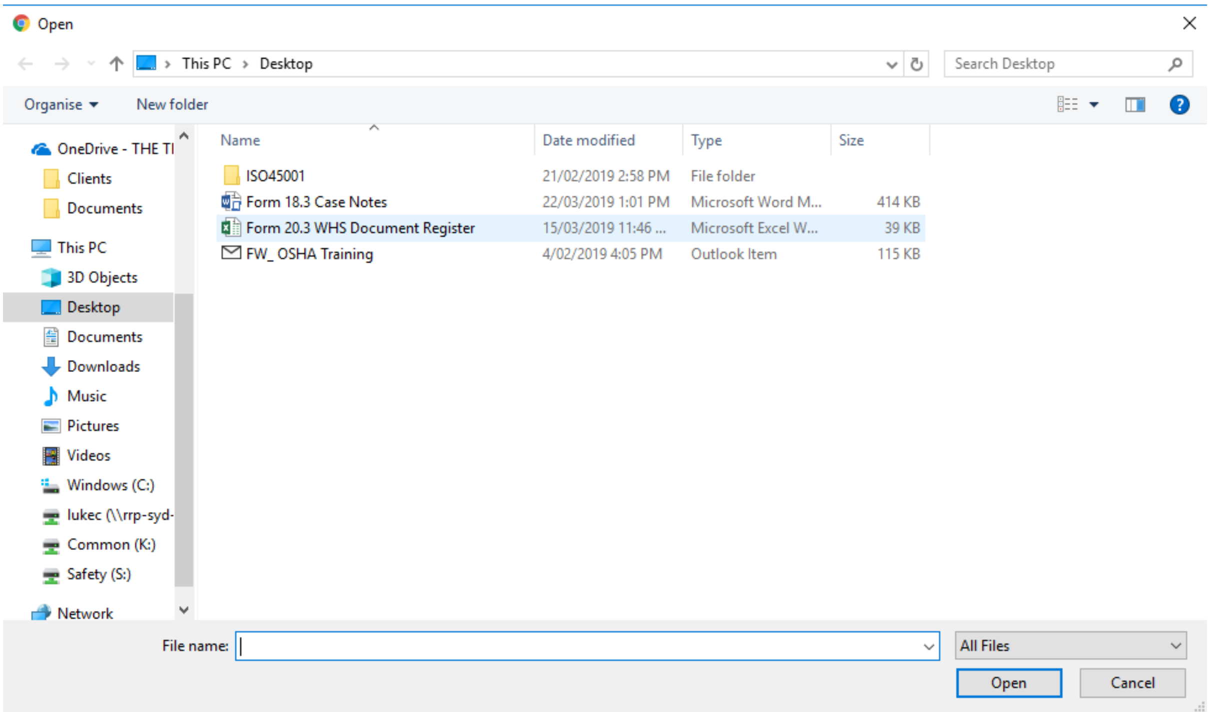
Continue this process until all witnesses have been added. Following this, ***CLICK*** 'Next' and we will move onto the next step.

Upon ***CLICKING*** 'Next', a new page will appear (as seen below)



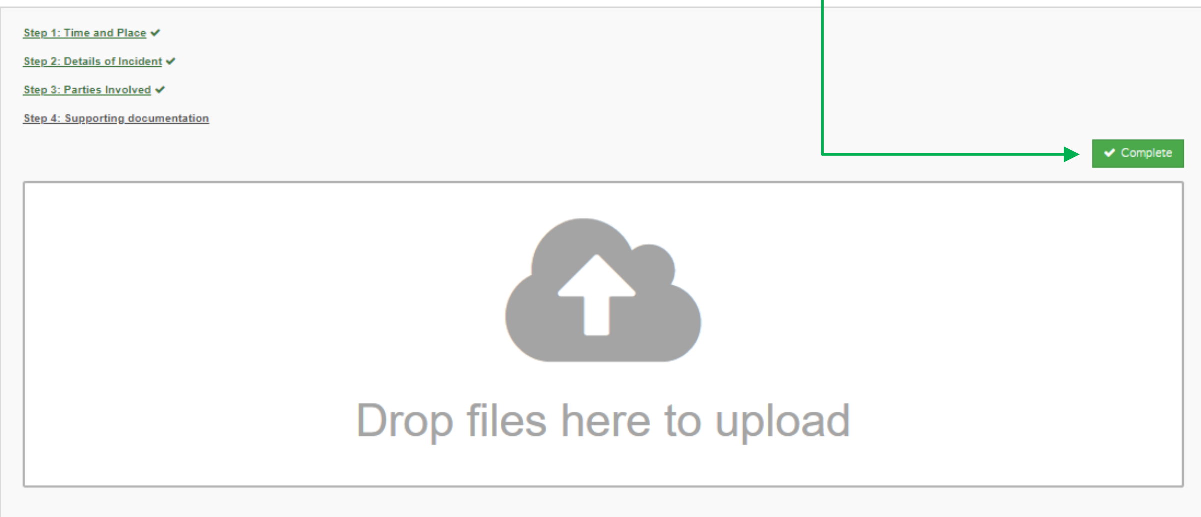
Step 4: Supporting Documentation

This step is where we can add in any photos or incident report forms we have filled out by pen. You can either drag and drop files into the box seen above, or, click on it and it will open the window seen below.



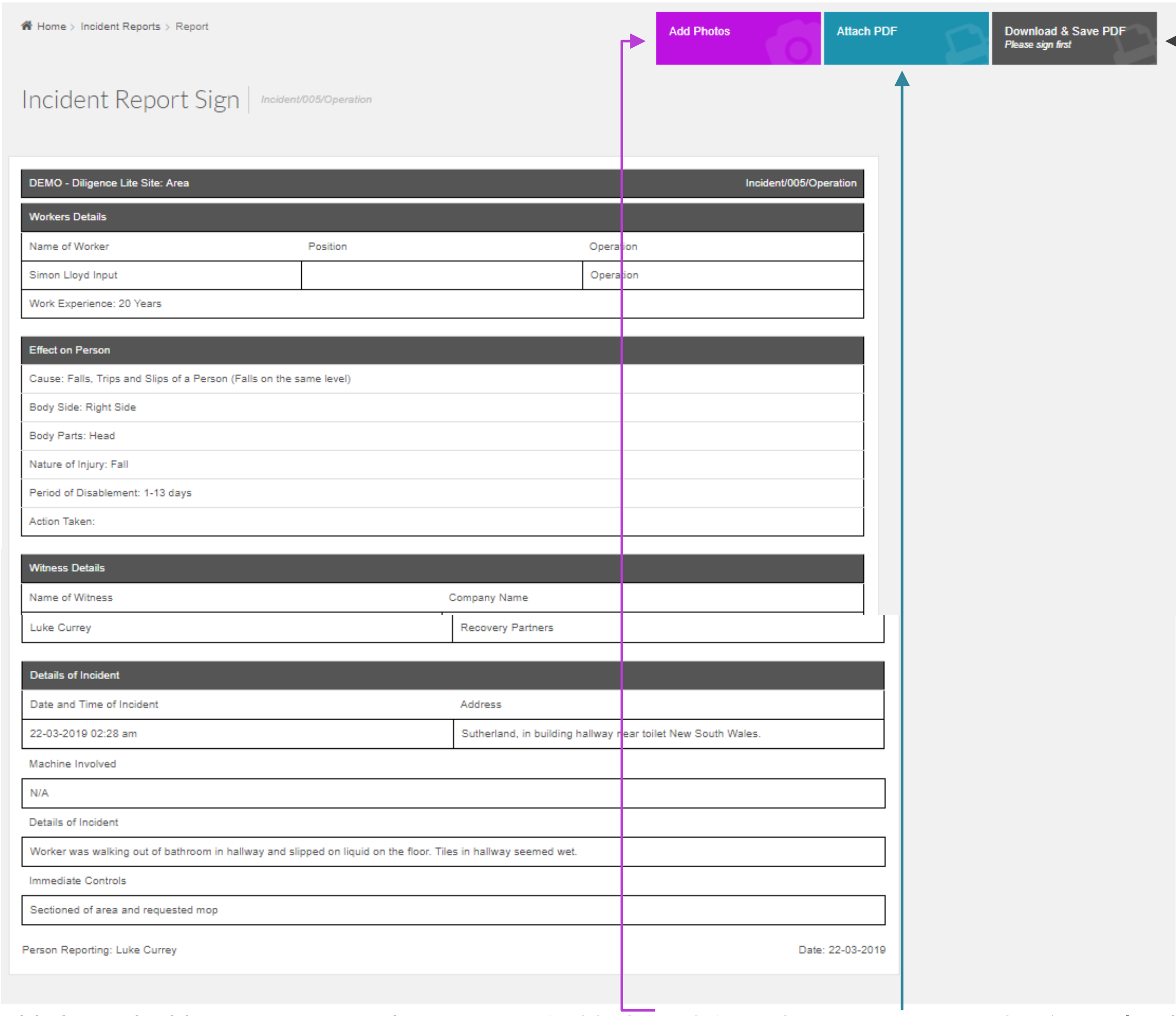
NAVIGATE to any images or supporting documents you wish to attach to this incident, ***SELECT*** them and ***CLICK*** 'Open' to attach them as supporting documentation.

Following this step, we will ***CLICK*** 'Complete'.



The incident has now been entered into the system.

After ***CLICKING*** 'Complete', a new window will appear (as seen below).

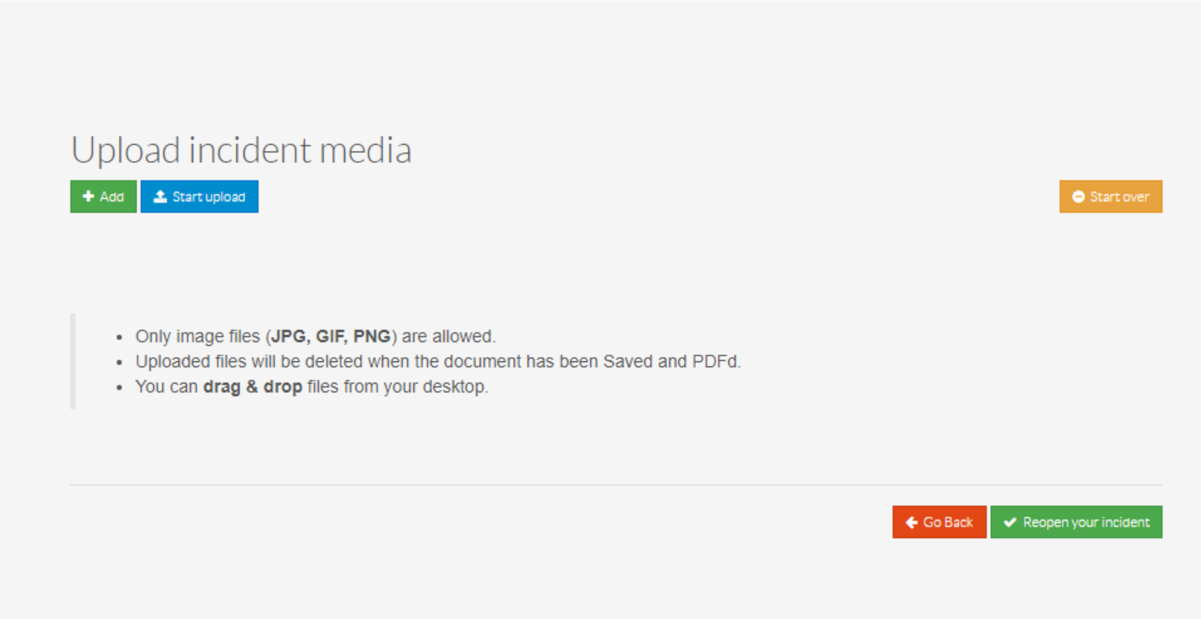


DEMO - Diligence Lite Site: Area		Incident/005/Operation
Workers Details		
Name of Worker	Position	Operation
Simon Lloyd Input		Operation
Work Experience: 20 Years		
Effect on Person		
Cause: Falls, Trips and Slips of a Person (Falls on the same level)		
Body Side: Right Side		
Body Parts: Head		
Nature of Injury: Fall		
Period of Disablement: 1-13 days		
Action Taken:		
Witness Details		
Name of Witness	Company Name	
Luke Currey	Recovery Partners	
Details of Incident		
Date and Time of Incident	Address	
22-03-2019 02:28 am	Sutherland, in building hallway near toilet New South Wales.	
Machine Involved		
N/A		
Details of Incident		
Worker was walking out of bathroom in hallway and slipped on liquid on the floor. Tiles in hallway seemed wet.		
Immediate Controls		
Sectioned of area and requested mop		

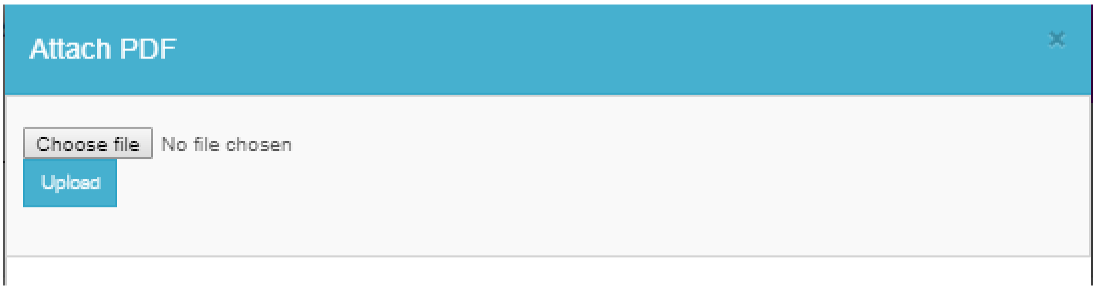
Person Reporting: Luke Currey — Date: 22-03-2019

This is our incident report. From here we can 'Add Photos', 'Attach PDF Documents' or 'Download and Save PDF' (but we must sign the report before clicking download and save pdf).

If we wish to add photos, ***CLICK*** the 'Add Photos' button and a new page will appear.

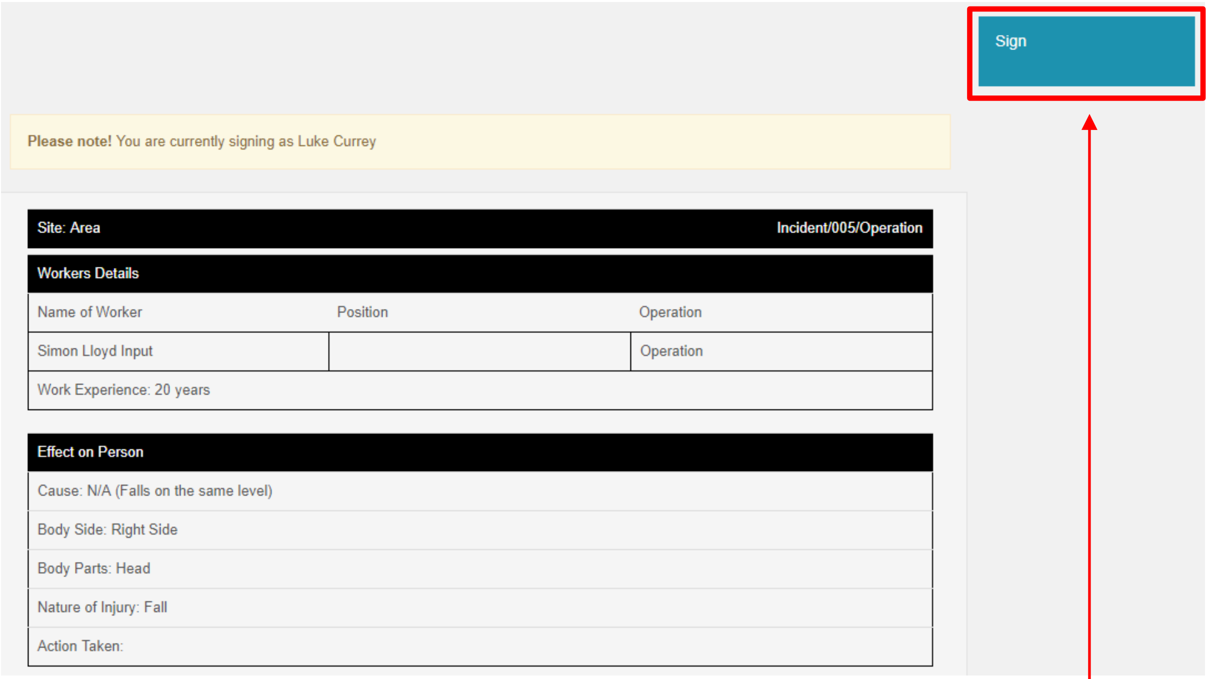


If we wish to add PDF documents, click the 'Attach PDF' button and a pop-up will appear.



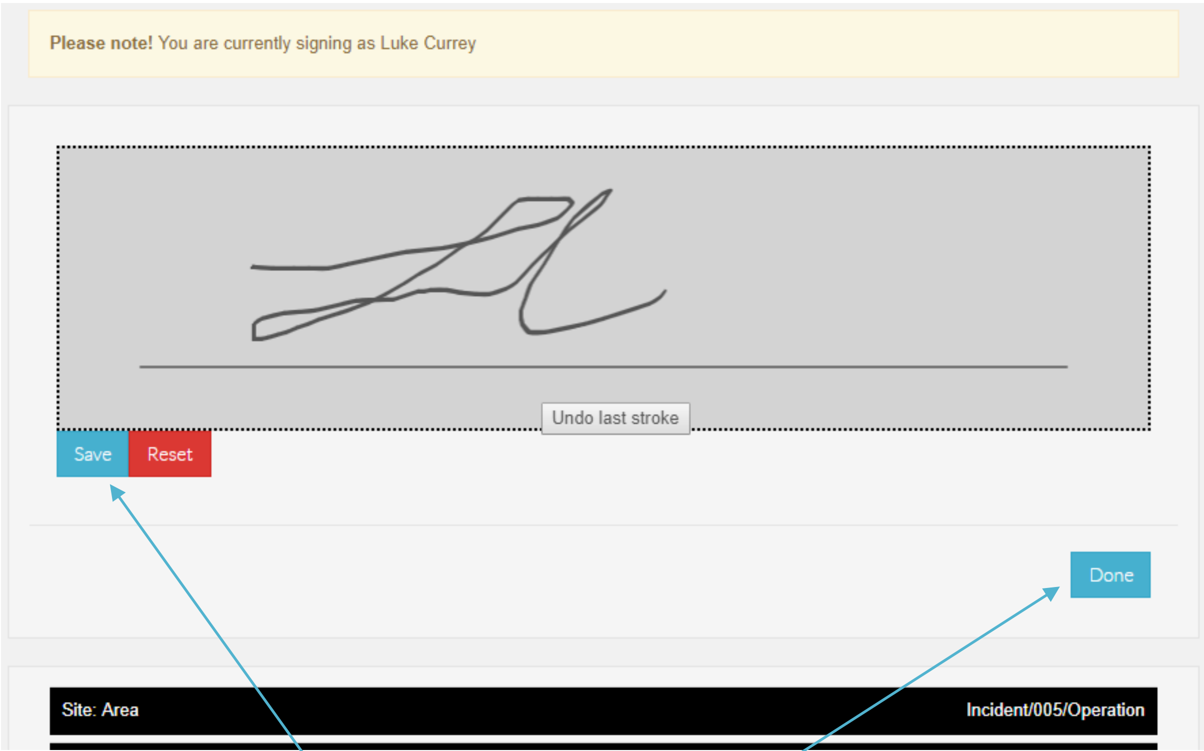
After we have added any photos or documents and before we finalise anything, we must sign the incident report by ***CLICKING*** the 'Sign Online' button at the bottom of the page (as seen below)

Once we ***CLICK*** the 'Sign Online' link, a new page will appear.



CLICK the 'Sign' button at the top right of the new page.

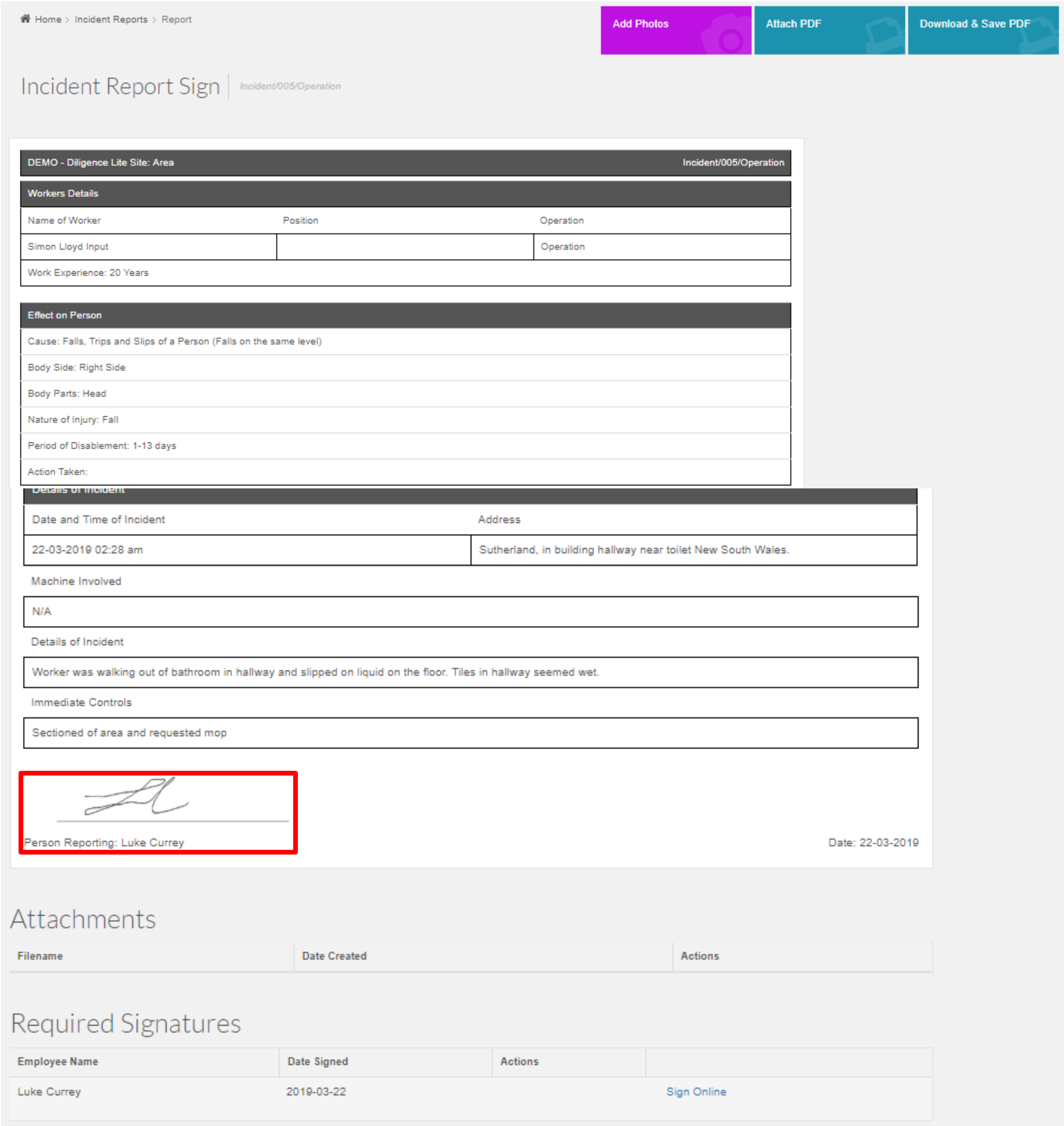
Upon ***CLICKING*** the button, a new box will appear where you can sign. If you are using a tablet you can sign with your finger, if using a laptop or pc you can use the mouse or trackpad to sign.

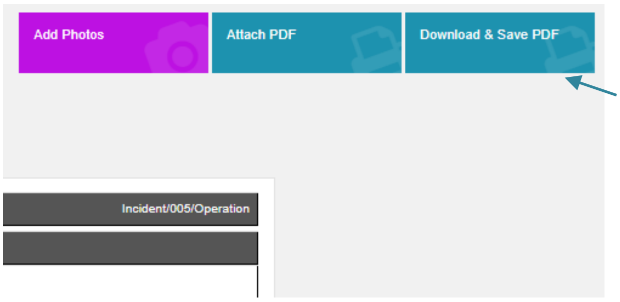


Once signed, ***CLICK*** the 'Save' button, and then ***CLICK*** the 'Done' button.

Following this, you will now be returned to the previous page.

However, you will notice two changes, the ‘Download & Save PDF’ button will have changed colours (from black to blue) and down the bottom of the page you will now see a signature.

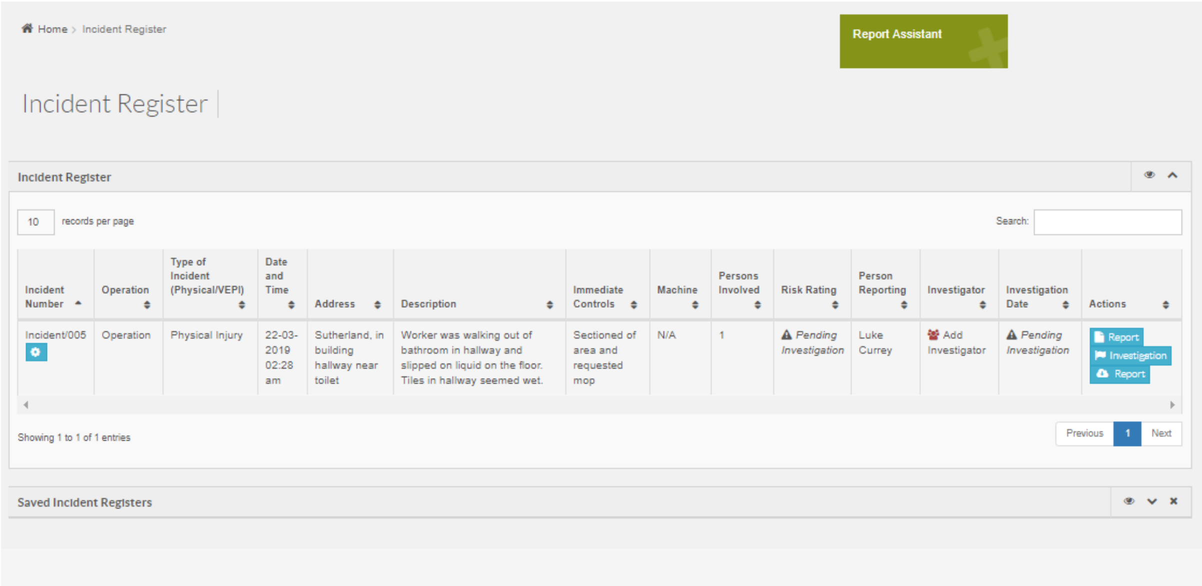




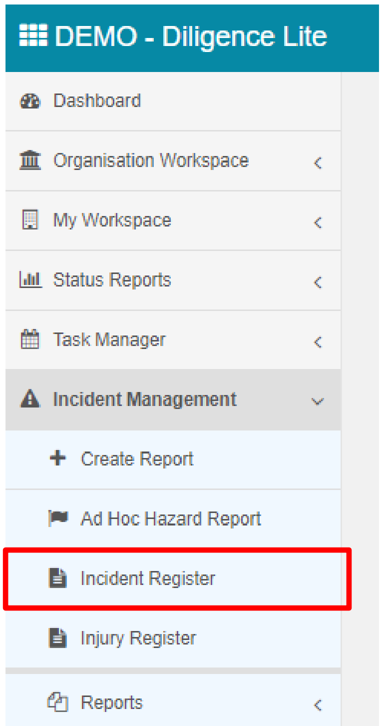
Your report is now complete, you can now ***CLICK*** the ‘Download & Save PDF’ button at the top right of page.

Upon ***CLICKING*** this, your document will download in PDF format.

Once you have completed all the above steps, a new page will appear (as seen below).



This is your incident register. From this page you can do numerous things within Diligence.



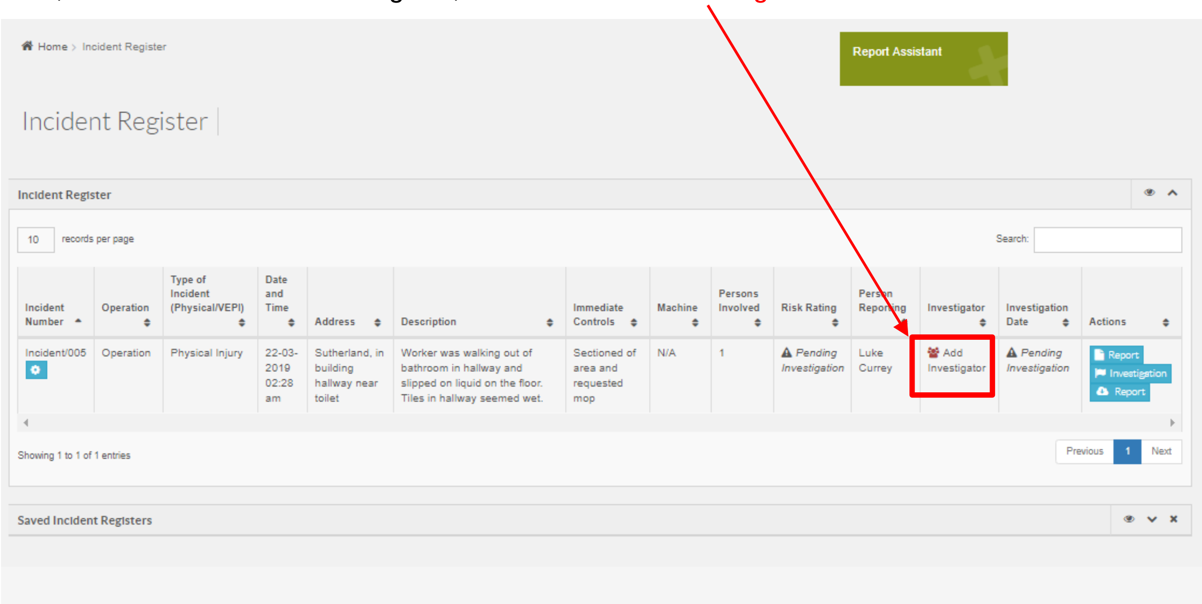
If you ever wish to navigate back to your 'Incident Register', it can be found here.

This incident, if resulting in an injury, will also appear in your injury register where the RTW process can occur, but we will go through that later.

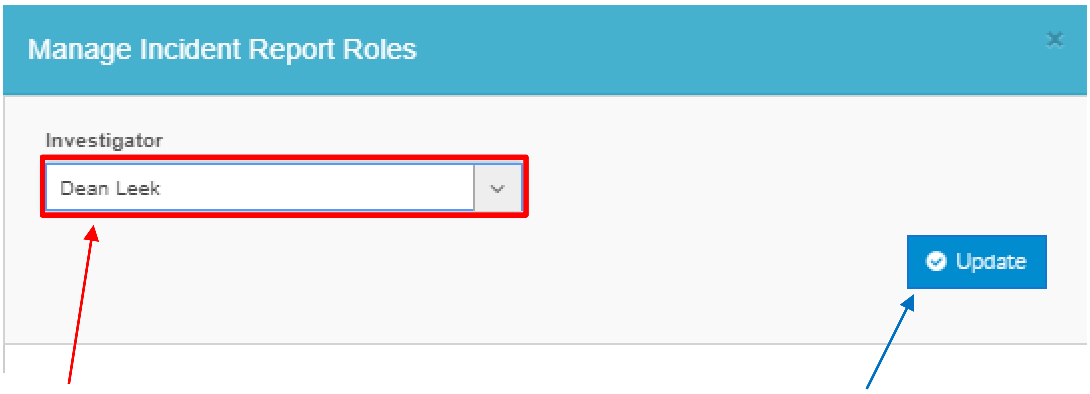
Now lets begin an investigation into the incident!

INCIDENT INVESTIGATION

First, we need to add an investigator, ***CLICK*** the 'Add Investigator' icon.

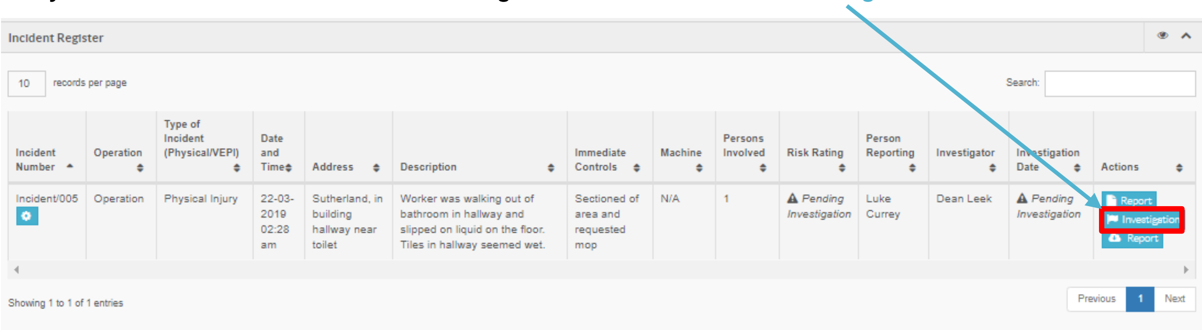


When you ***CLICK*** the icon, a pop-up will appear (as seen below)



SELECT who you want to investigate the incident and ***CLICK*** the 'Update' button. You will now be returned to the previous page.

Now an investigator has been added, they will receive a notification and can begin investigation. They will ***NAVIGATE*** to the 'Incident Register' and ***CLICK*** the 'Investigation' button.



This will open a new page, and we can conduct an investigation into the incident (as seen on next page).

Recovery Partners

Home › Incident Register › Incident Investigation

Add Photos | Attach PDF

Incident Investigation

Incident/005/Operation

DEMO - Diligence Lite Site: Area		Incident/005/Operation
Workers Details		
Name of Worker	Position	Operation
Simon Lloyd Input		Operation
Work Experience: 20 Years		

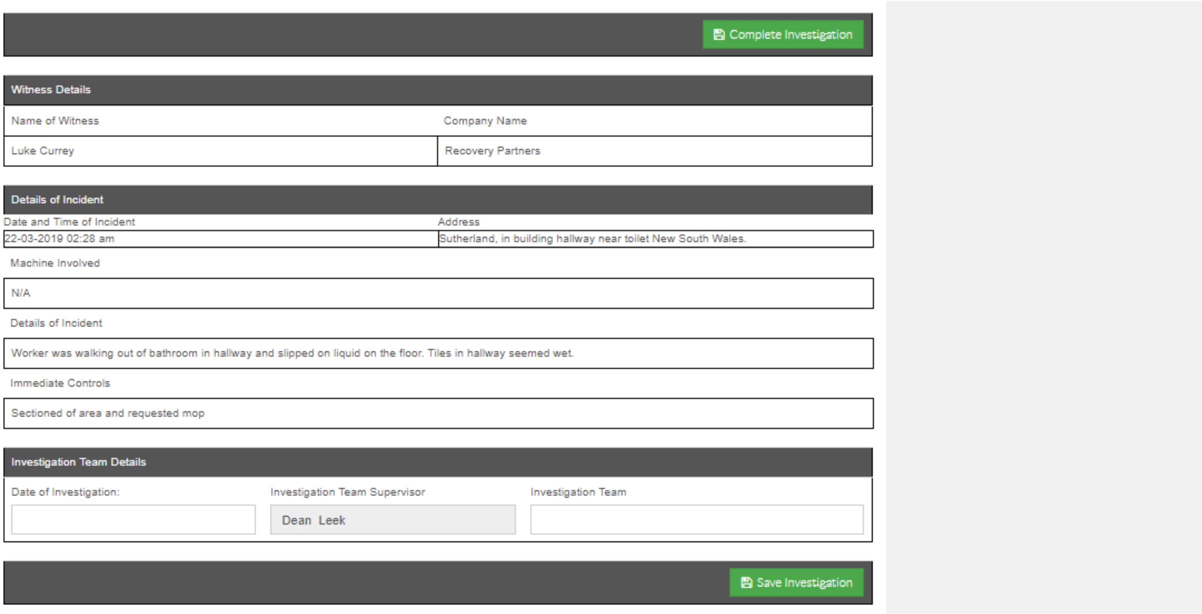
Effect on Person
Cause: Falls, Trips and Slips of a Person (Falls on the same level)
Body Side: Right Side
Body Parts: Head
Nature of Injury: Fall
Period of Disablement: 1-13 days
Action Taken:

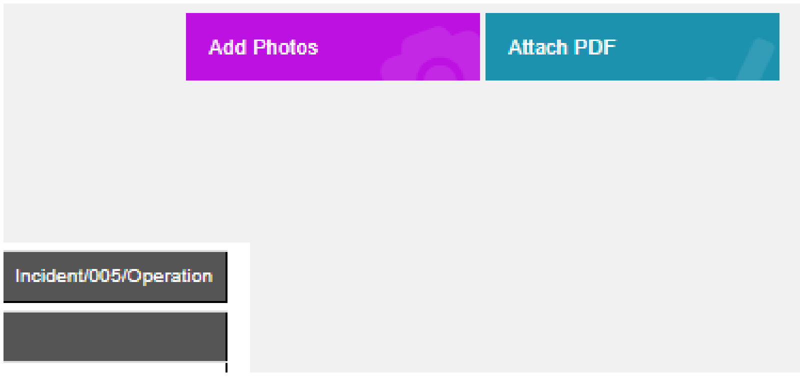
Details of Treatment
☐ Received First Aid?
☐ See a doctor?
☐ Cease Work?
☐ Go to hospital?

Contributng Factors to Consider			
Person		**Environment**	
Aware of the hazard	Yes	Weather Conditions	Yes
Suitable for the task	Yes	Adequate lighting	Yes
Experienced at the task	Yes	Adequate working space	Yes
Familiar with the work area	Yes	Clear floor and walkways	Yes
Inducted to the site / task	Yes	Adequate housekeeping	Yes
Using appropriate PPE	Yes	Safe noise level	Yes
Job/Task		**Equipment**	
Was training provided	Yes	Correct equipment used	Yes
Supervision provided	Yes	Equipment in correct location	Yes
SWMS performed	Yes	Equipment guarded	Yes
Work procedures available	Yes	Preventative maintenance complete	Yes
Task not modified / changed	Yes	Equipment working properly	Yes
PPE Provided	Yes	Equipment had not been modified	Yes

Investigation Outcomes
Was the employee doing a routine activity? ○ Yes ○ No
Was company policy breached? ○ Yes ○ No
Was the employee disciplined? ○ Yes ○ No
Any other contributing factors? ○ Yes ○ No

Continued on next page.

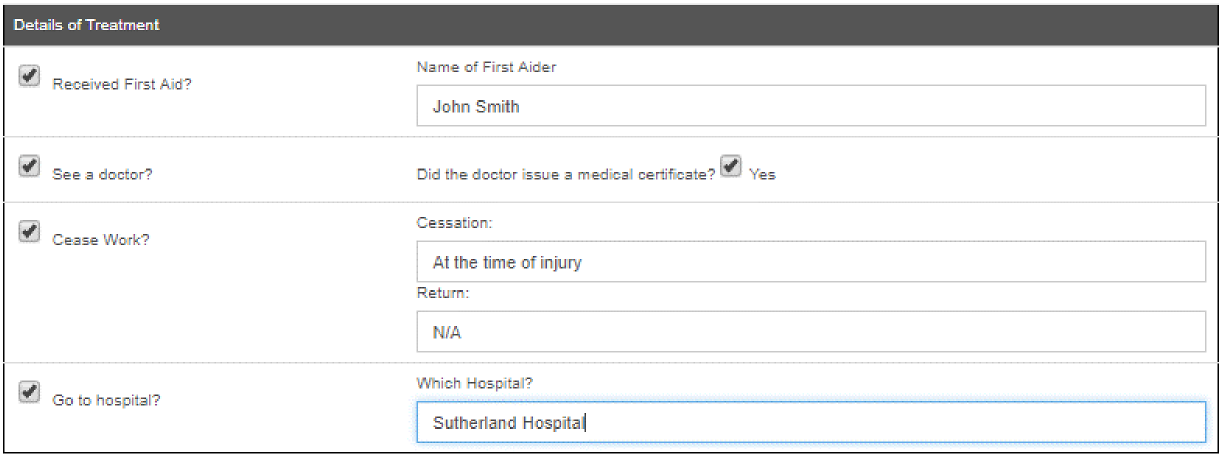




In the incident investigation we can ‘Add Images’ or ‘Attach PDF’s’ by clicking these two buttons.

But let’s start investigating.

First let’s ***INPUT*** details of the incident by ***CLICKING*** the appropriate check boxes and inputting the requested information.



Now we will add any contributing factors that contributed to the incident occurring. We do this by selecting the appropriate answers in the drop-down boxes (as can be seen below).

Contributng Factors to Consider			
Person		**Environment**	
Aware of the hazard	No	Weather Conditions	Yes
Suitable for the task	Yes	Adequate lighting	Yes
Experienced at the task	Yes	Adequate working space	Yes
Familiar with the work area	Yes	Clear floor and walkways	No
Inducted to the site / task	Yes	Adequate housekeeping	No
Using appropriate PPE	Yes	Safe noise level	Yes
Job/Task		**Equipment**	
Was training provided	Yes	Correct equipment used	Yes
Supervision provided	Yes	Equipment in correct location	Yes
SWMS performed	Yes	Equipment guarded	Yes
Work procedures available	Yes	Preventative maintenance complete	Yes
Task not modified / changed	Yes	Equipment working properly	Yes
PPE Provided	Yes	Equipment had not been modified	Yes

Now we will enter the investigation outcomes (as seen below)

Investigation Outcomes	
Was the employee doing a routine activity? (●) Yes ( ) No	Going to toilet
Was company policy breached? ( ) Yes (●) No	
Was the employee disciplined? ( ) Yes (●) No	
Any other contributing factors? (●) Yes ( ) No	Contractors did not clean up toilet after conducting works on toilet

Now let's complete the investigation by ***CLICKING*** the 'Complete Investigation' button.

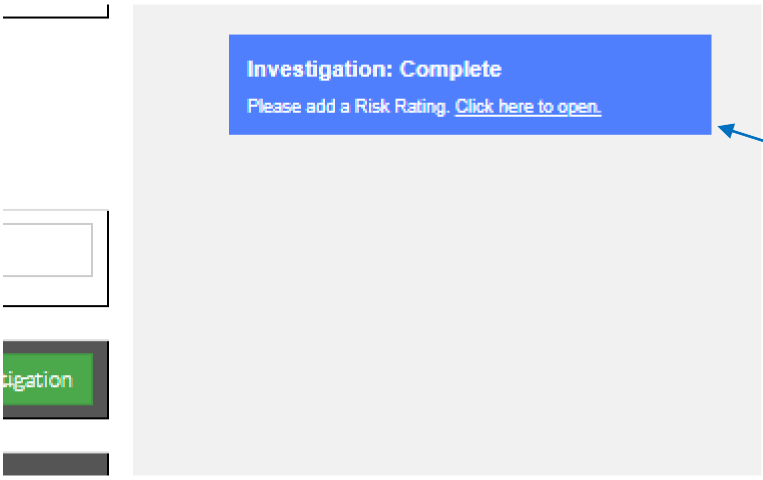
(●) Yes ( ) No Contractors did not clean up toilet after conducting works on toilet

Complete Investigation

Following this, we need to ***INPUT*** 'Date' and Investigation Team', then ***CLICK*** 'Save'.

Investigation Team Details		
Date of Investigation:	Investigation Team Supervisor	Investigation Team
	Dean Leek	

Save Investigation



A pop-up will appear in top right corner. This is where we can add a risk rating.

CLICK the 'Blue Box' to proceed.

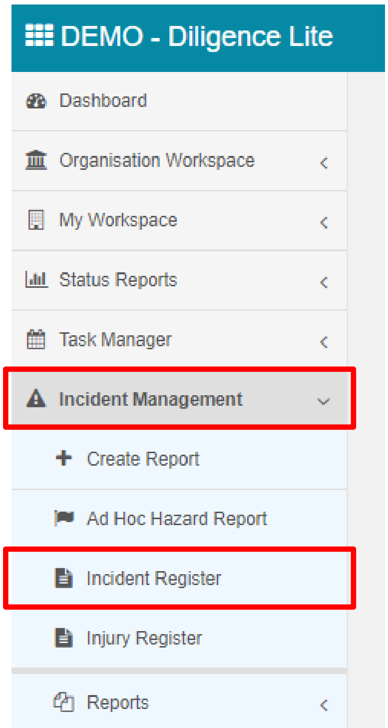
Once we have added a risk rating, lets complete the investigation and print the report. We do this by ***CLICKING*** 'Complete and Print' button. Following this the report will automatically download.

Congratulations, Incident Investigation complete!

Now on to managing our workers RTW.

INJURY MANAGEMENT

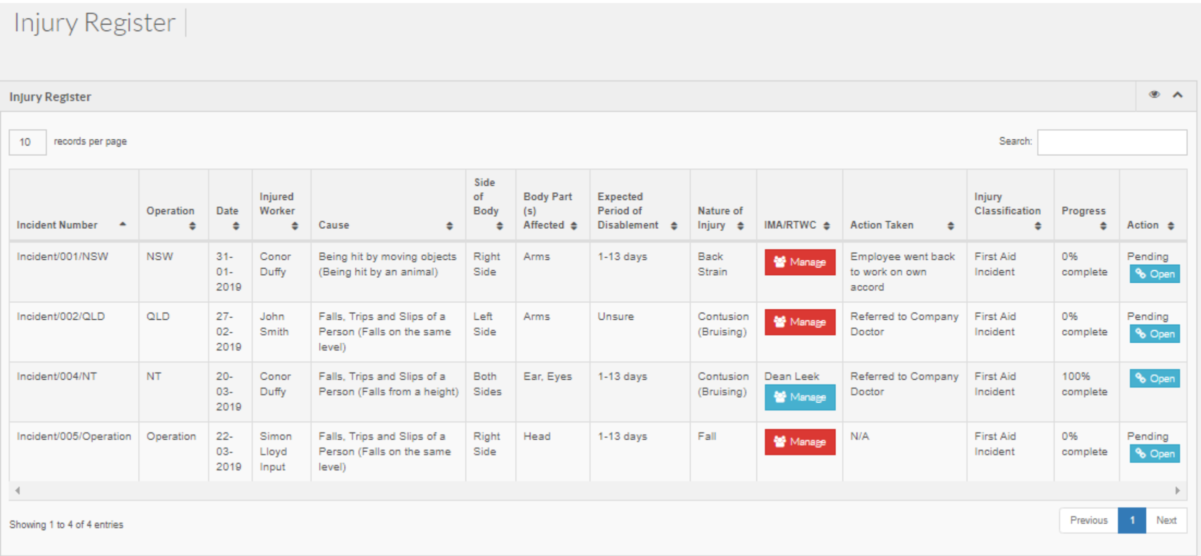
We have now investigated the incident, but our worker received serious injuries in that slip. Diligence gives you the ability to handle all you RTW needs within the system. Lets see how.



First ***CLICK*** on the 'Incident Management' drop down.

Then ***CLICK*** on 'Injury Register'.

A new page will open (as seen below)



Injury Register

Injury Register

10 records per page

Search:

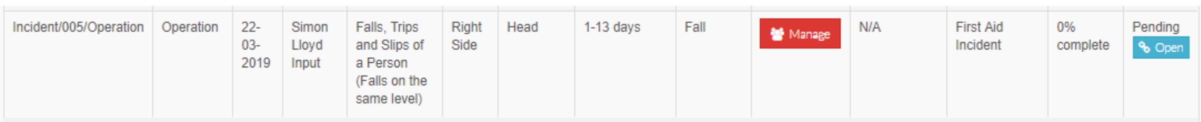
Incident Number	Operation	Date	Injured Worker	Cause	Side of Body	Body Part (s) Affected	Expected Period of Disablement	Nature of Injury	IMA/RTWC	Action Taken	Injury Classification	Progress	Action
Incident/001/NSW	NSW	31-01-2019	Conor Duffy	Being hit by moving objects (Being hit by an animal)	Right Side	Arms	1-13 days	Back Strain	Manage	Employee went back to work on own accord	First Aid Incident	0% complete	Pending Open
Incident/002/QLD	QLD	27-02-2019	John Smith	Falls, Trips and Slips of a Person (Falls on the same level)	Left Side	Arms	Unsure	Contusion (Bruising)	Manage	Referred to Company Doctor	First Aid Incident	0% complete	Pending Open
Incident/004/NT	NT	20-03-2019	Conor Duffy	Falls, Trips and Slips of a Person (Falls from a height)	Both Sides	Ear, Eyes	1-13 days	Contusion (Bruising)	Dean Leek Manage	Referred to Company Doctor	First Aid Incident	100% complete	Open
Incident/005/Operation	Operation	22-03-2019	Simon Lloyd Input	Falls, Trips and Slips of a Person (Falls on the same level)	Right Side	Head	1-13 days	Fall	Manage	N/A	First Aid Incident	0% complete	Pending Open

Showing 1 to 4 of 4 entries

Previous 1 Next

This is our injury register, any incident which results in an injury will appear here.

Remember our worker who slipped and fell? Well here is his injury and incident number.

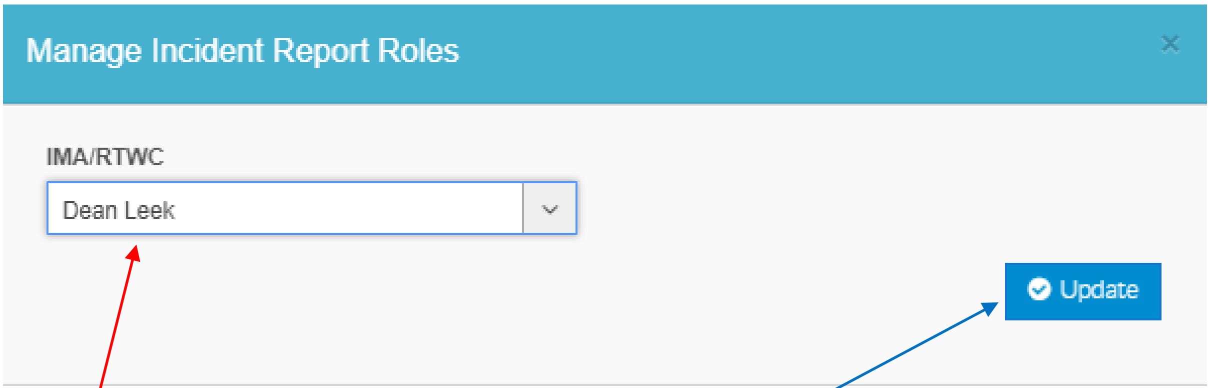


Incident/005/Operation	Operation	22-03-2019	Simon Lloyd Input	Falls, Trips and Slips of a Person (Falls on the same level)	Right Side	Head	1-13 days	Fall	Manage	N/A	First Aid Incident	0% complete	Pending Open

We need to select somebody to manage his injury/case, our Return to Work Coordinator (RTWC). We do this by ***CLICKING*** on the 'Manage' button.

Incident/005/Operation	Operation	22-03-2019	Simon Lloyd Input	Falls, Trips and Slips of a Person (Falls on the same level)	Right Side	Head	1-13 days	Fall	Manage	N/A	First Aid Incident	0% complete	Pending Open

A pop-up will appear (as seen below)

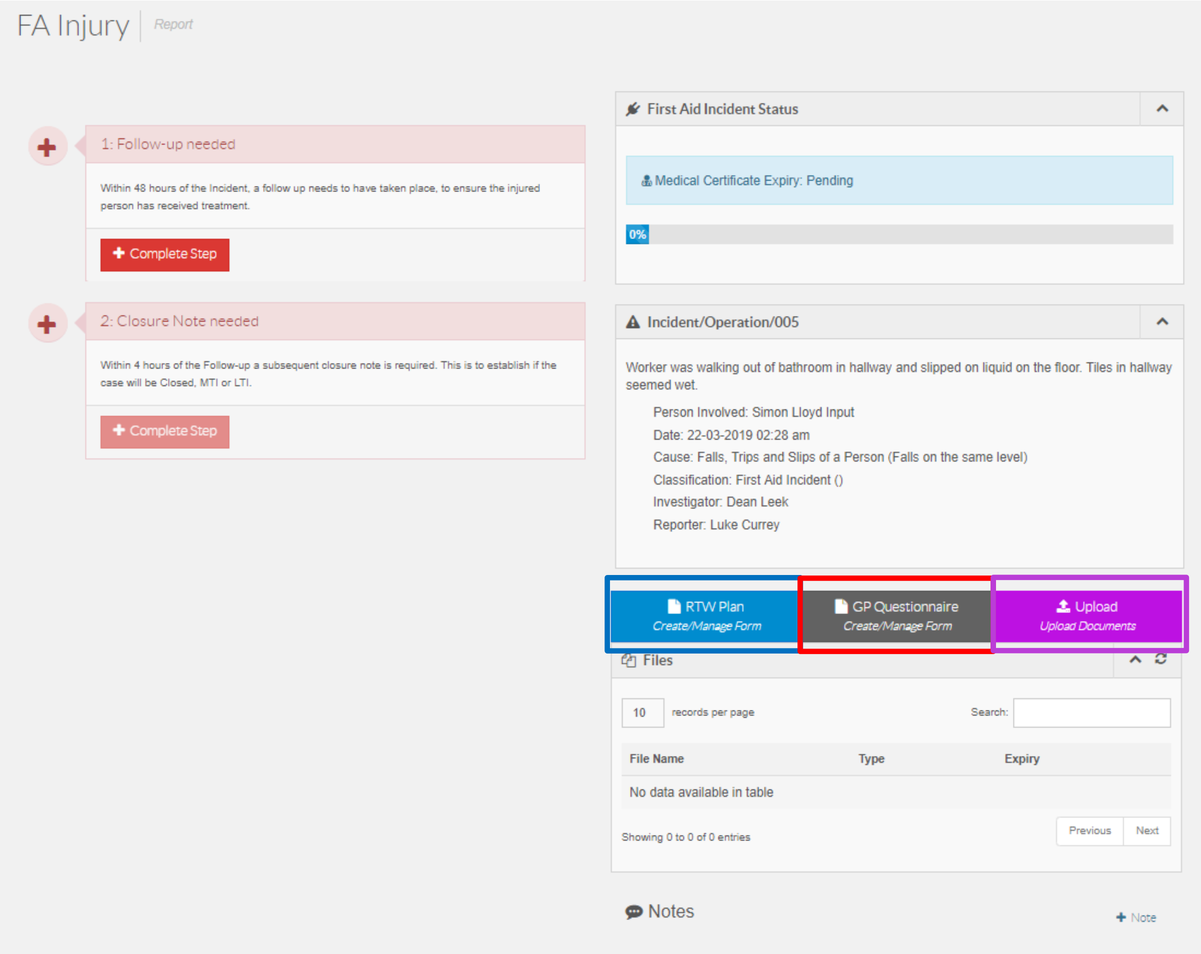


SELECT the RTWC from the drop-down box and ***CLICK*** 'Next'.

The RTWC will now get a notification in his Diligence app. Next, we will ***CLICK*** 'Open' to manage the injury.

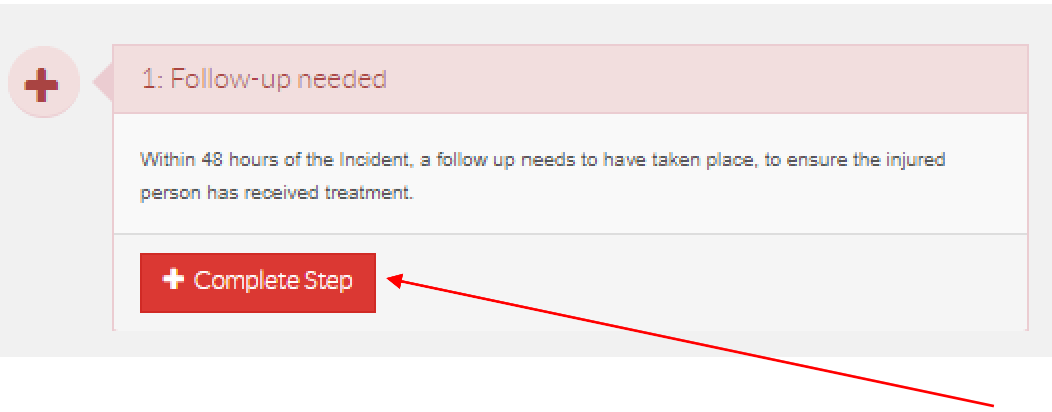
Incident Number	Operation	Date	Injured Worker	Cause	Side of Body	Body Part (s) Affected	Expected Period of Disablement	Nature of Injury	IMA/RTWC	Action Taken	Injury Classification	Progress	Action
Incident/005/Operation	Operation	22-03-2019	Simon Lloyd Input	Falls, Trips and Slips of a Person (Falls on the same level)	Right Side	Head	1-13 days	Fall	Dean Leek Manage	N/A	First Aid Incident	0% complete	Pending Open

This will take you to a new page (as seen below)

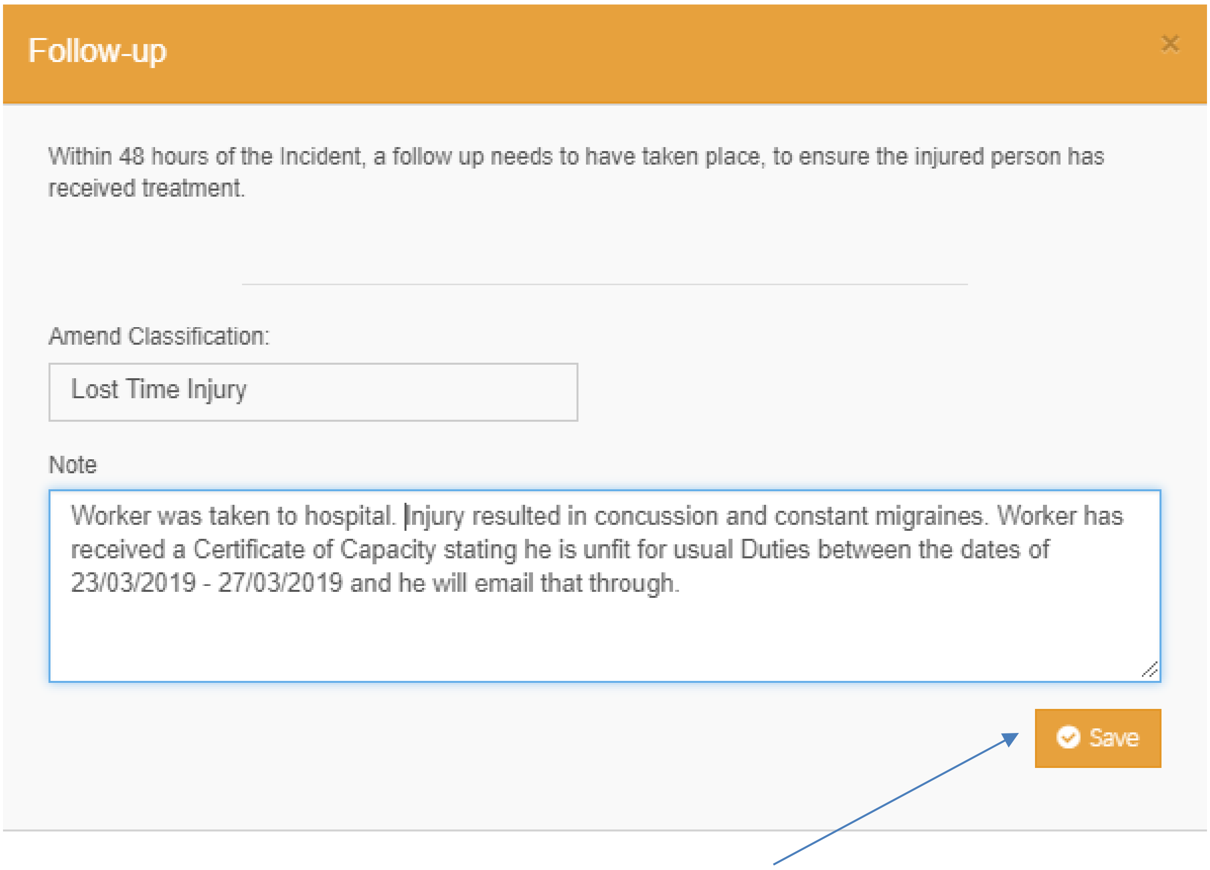


From this page we can download a blank Return to Work Plan (RTWP) template by ***CLICKING*** the 'RTW Plan' button (to be filled out in the RTW phase). We can also download a GP questionnaire to be emailed or faxed to the treating medical Dr to gain a better understanding of the injured workers prognosis. We do this by ***CLICKING*** the 'GP Questionnaire' button. Lastly, any documentation related to the injured worker or this claim, can be Uploaded to this file by ***CLICKING*** the 'Upload' button and following the steps.

Step 1: Follow Up Injury

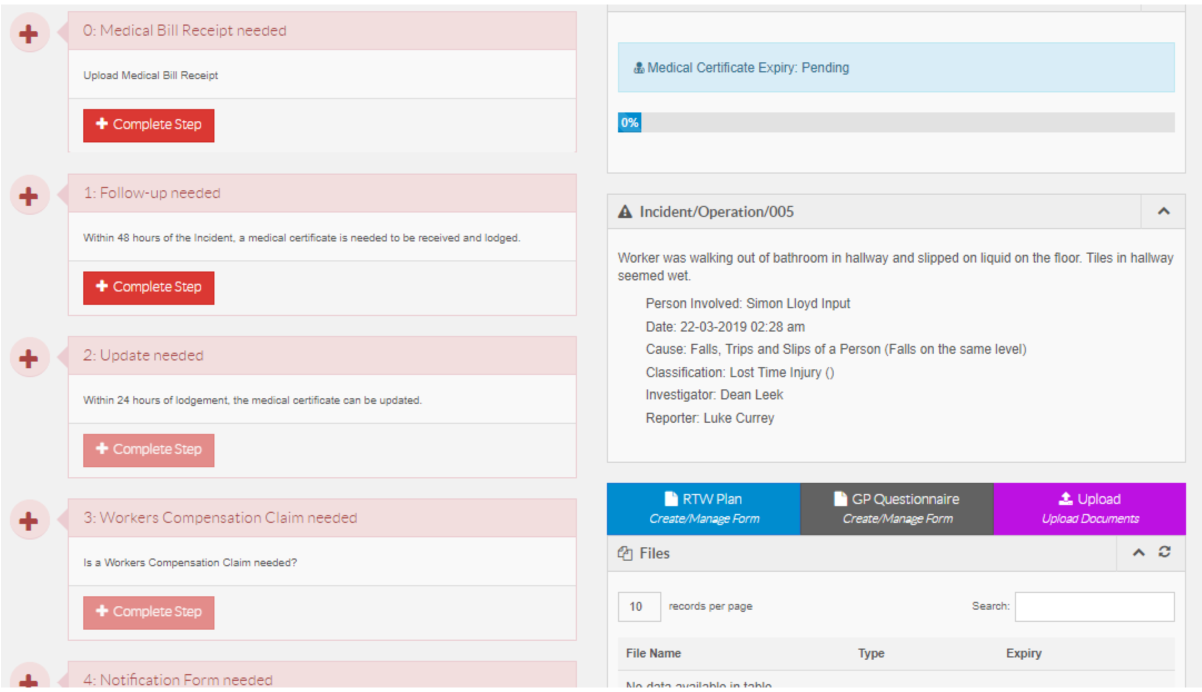


Ensure within 48 hrs a follow up call with the worker is made. We then ***CLICK*** 'Complete Step' and a pop-up will appear.



Fill out the required information in the pop-up window and ***CLICK*** 'Save'. Input as much info as possible.

Following this, you will be returned to the previous page. However, depending on your choice of injury classification (FAI, MTI or LTI) the page will change (as seen below).

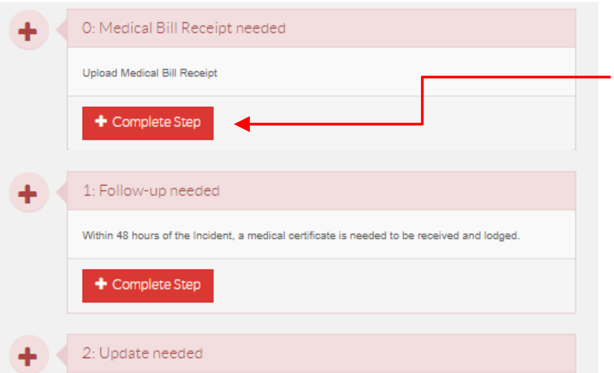


We now have 13 sections/steps that have appeared due to selecting LTI.

0. Medical Bill Receipt needed
1. Follow-Up Needed
2. Update Needed
3. Workers Compensation Claim needed
4. Notification Form needed
5. Claim Number needed
6. RTW Prognosis Questionnaire needed
7. RTW Plan (Suitable Duties Plan) needed
8. RTW Upload needed
9. RTW Communication needed
10. Medical Certificate needed
11. RTW Final Clearance needed
12. RTW Finalisation needed
13. RTW Closure needed

Lets go through these steps one-by-one.

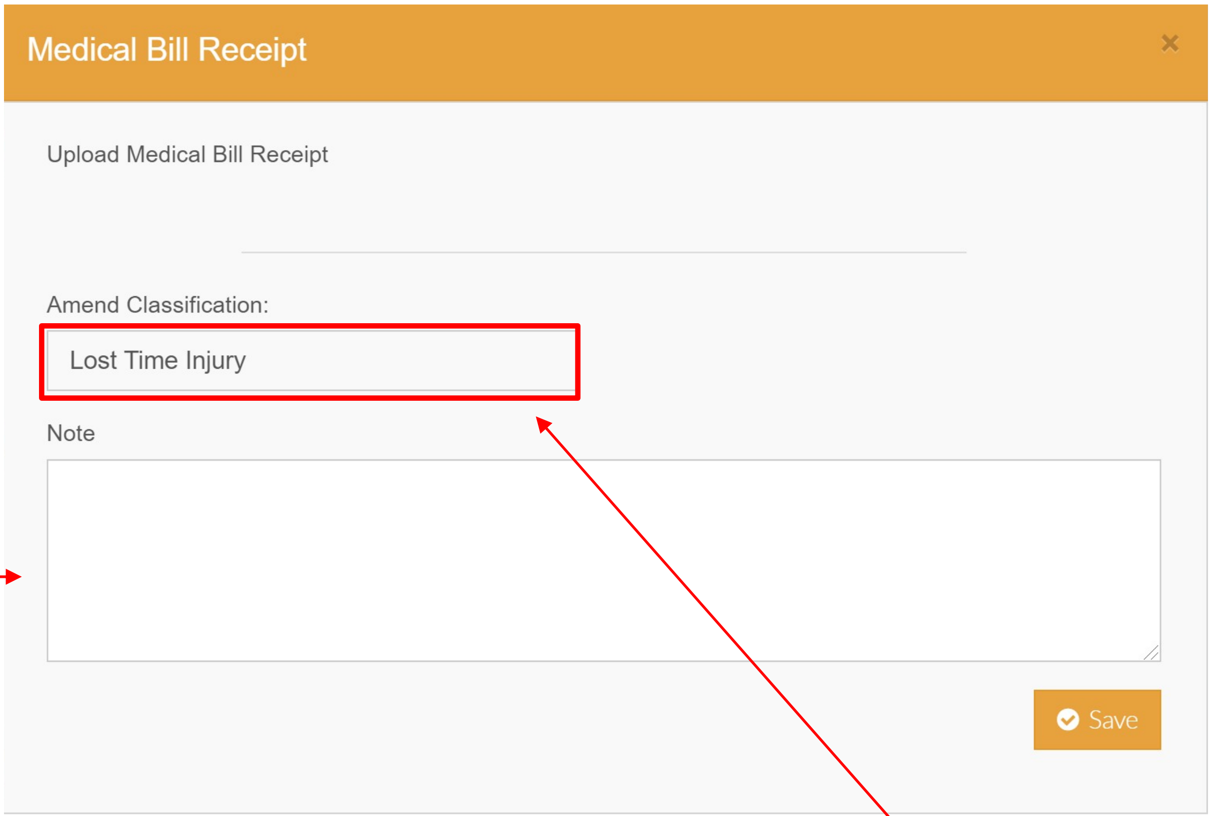
0. Upload Medical Bill Receipt



CLICK the 'Complete Step' button under '0. Medical Bill Receipt Needed'. *(This step is meant to be a reminder to request and receive the medical bill.)*

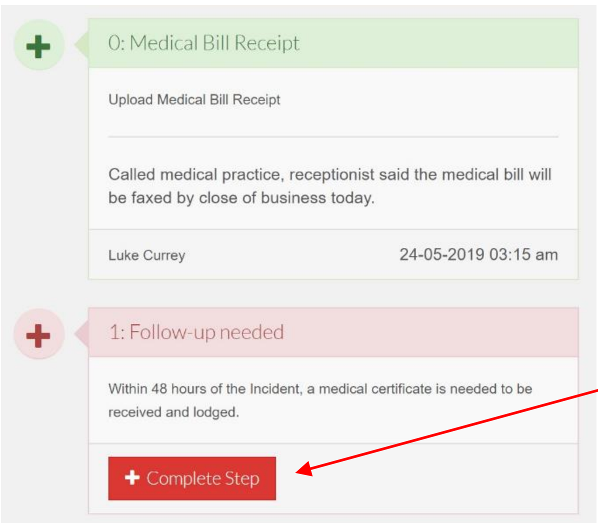
Please see next page to continue process.

A pop-up will appear (as seen below)



From this screen we can amend the injury classification by ***CLICKING*** 'Lost Time Injury' and select 'First Aid Injury' or 'Medical Treatment Injury' if required.

Otherwise, we can ***ENTER*** any notes e.g. *'Called medical practice, receptionist said the medical bill will be faxed by close of business today'*. Once notes have been entered, ***CLICK*** 'Save'.

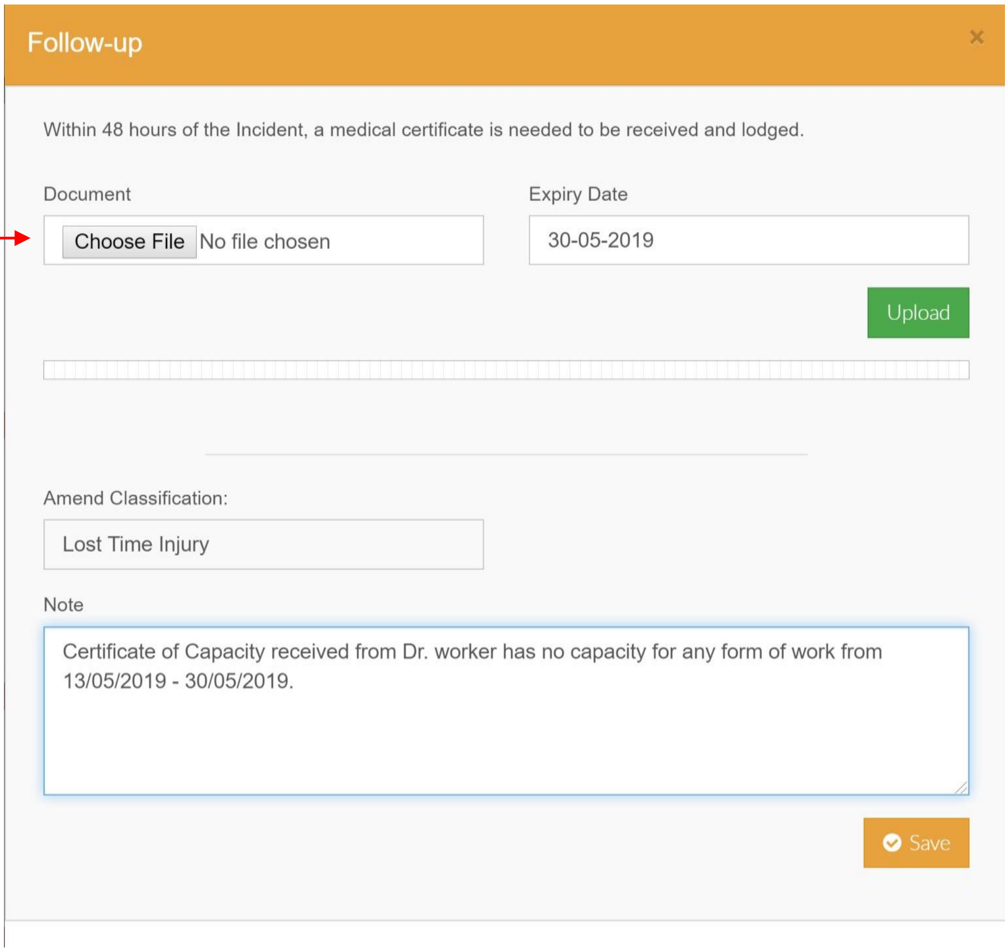


The pop-up will disappear and '0. Medical Bill Receipt Needed' will turn green.

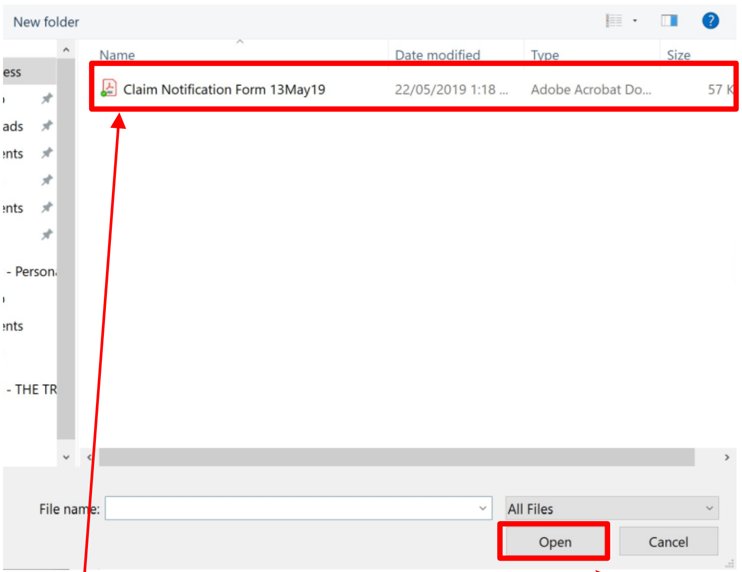
Now onto **Step 1**.

To continue, ***CLICK*** the 'Complete Step' button under '1. Follow-up Needed'. A pop-up will appear.

1. Follow-up Needed

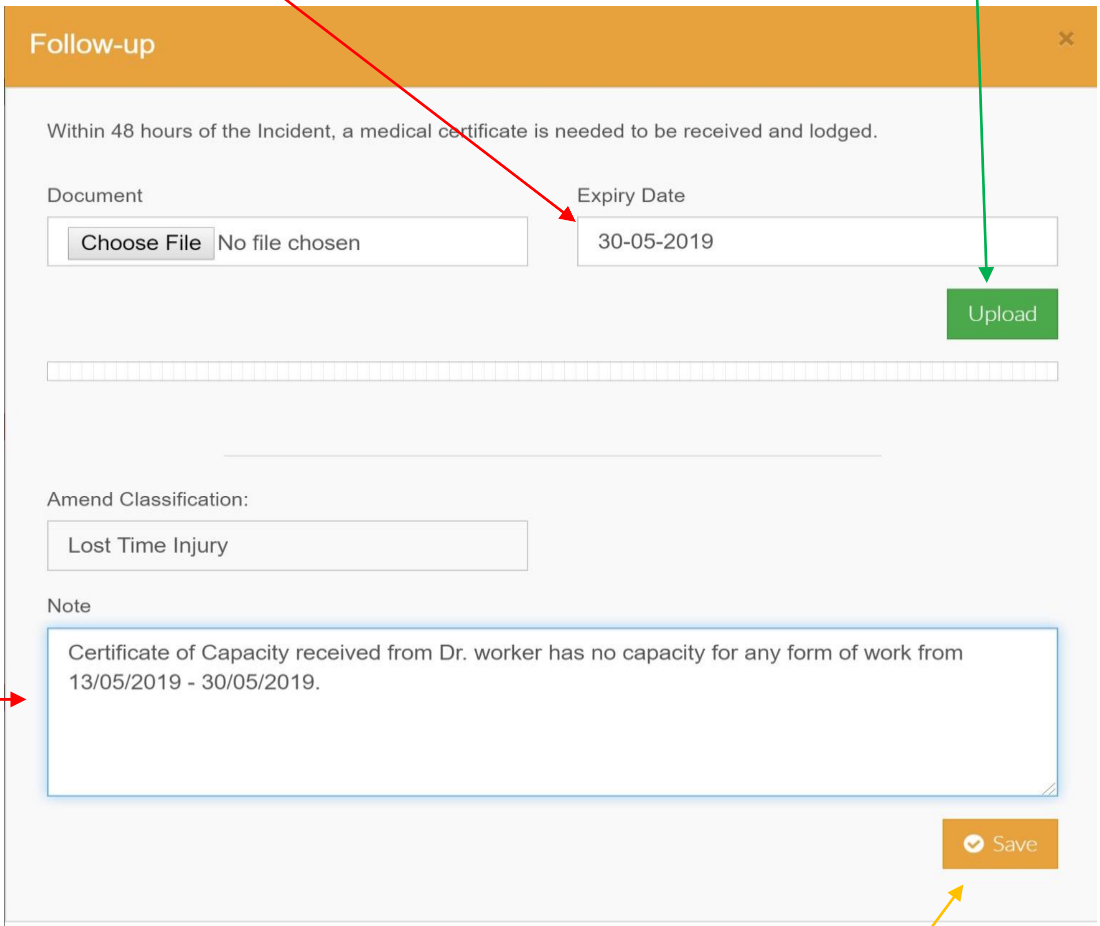


CLICK the ‘Choose File’ button.

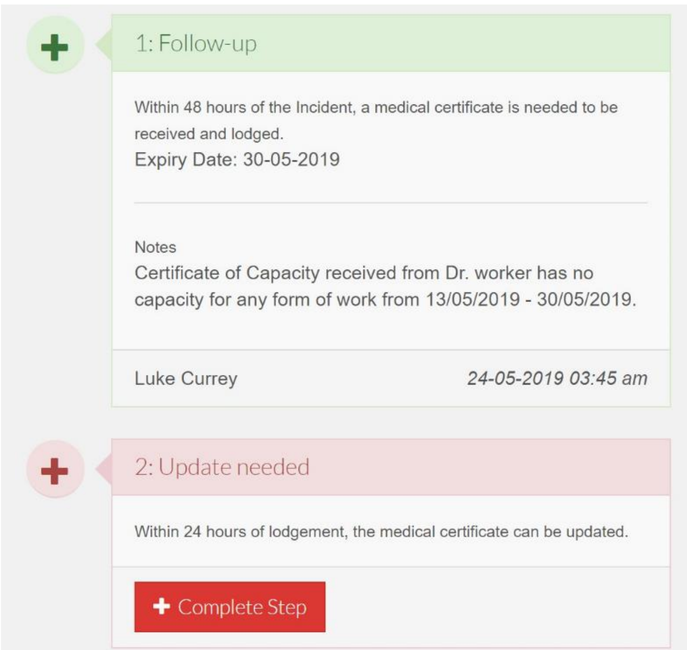


SELECT the correct file saved on computer and ***CLICK*** the ‘Open’ button.

Following this, ***ENTER*** the ‘Expiry Date’ of the certificate and ***CLICK*** the ‘Upload’ button’.



ENTER any specific notes relate to the medical certificate and ***CLICK*** ‘Save’.



Once completed, ‘1. Follow-up Needed’ will change colour to green.

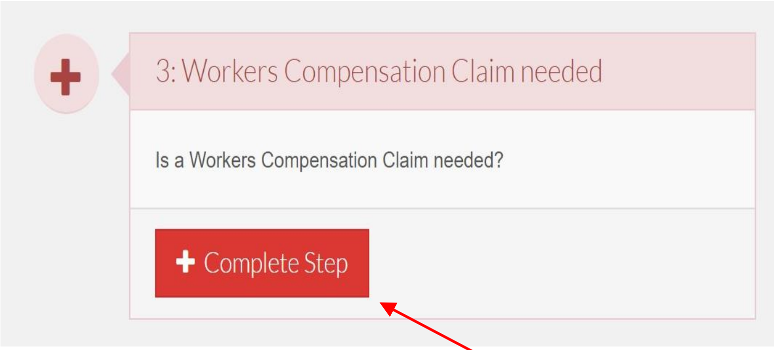
In the next step we can update the medical certificate if required.

2. Update Needed

We do this by ***CLICKING*** the ‘Complete Step’ button underneath ‘2. Update Needed’ and follow the same process as the previous step.

If there is no change required, ***CLICK*** ‘Complete Step’, write a note in the pop-up and click ‘Save’.

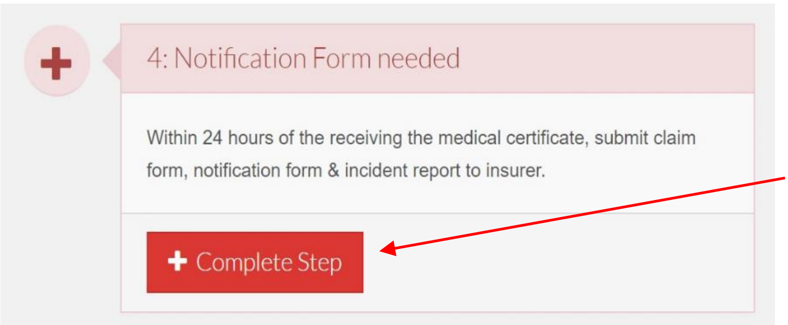
3. Workers Compensation Claim Needed



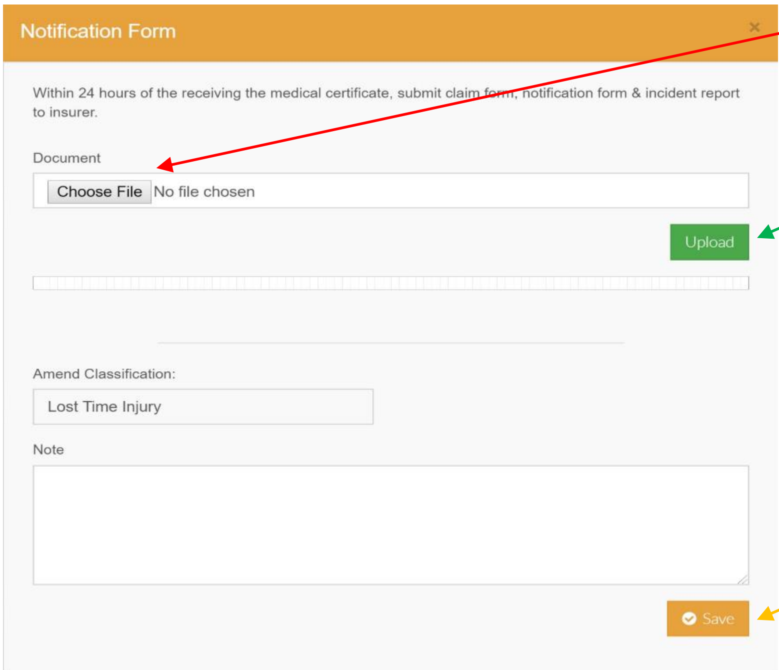
This step is where the decision of liability has been made and is meant as a reminder to request a Claim number.

To complete this step, we ***CLICK*** the ‘Complete Step’ button underneath ‘3. Workers Compensation Clam Needed’ and ***SELECT*** ‘Yes’ or ‘No’ under ‘Is a Workers Compensation Claim Needed?’, following this step ***ENTER*** any relevant notes in the notes section and ***CLICK*** ‘Save’.

4. Notification Form Needed



After we have notified the insurer of an injury, they will send out a ‘Notification Form’, we upload it to by ***CLICKING*** the ‘Complete Step’ button underneath ‘4. Notification Form Needed’.



CLICK the ‘Choose File’ button.

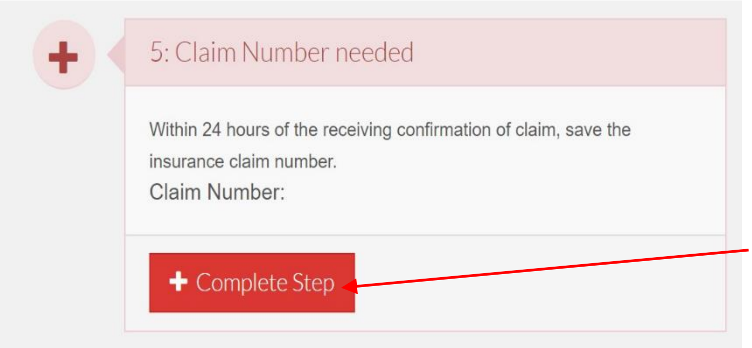
SELECT the file on your computer.

CLICK the ‘Upload’ button.

ENTER any relevant notes.

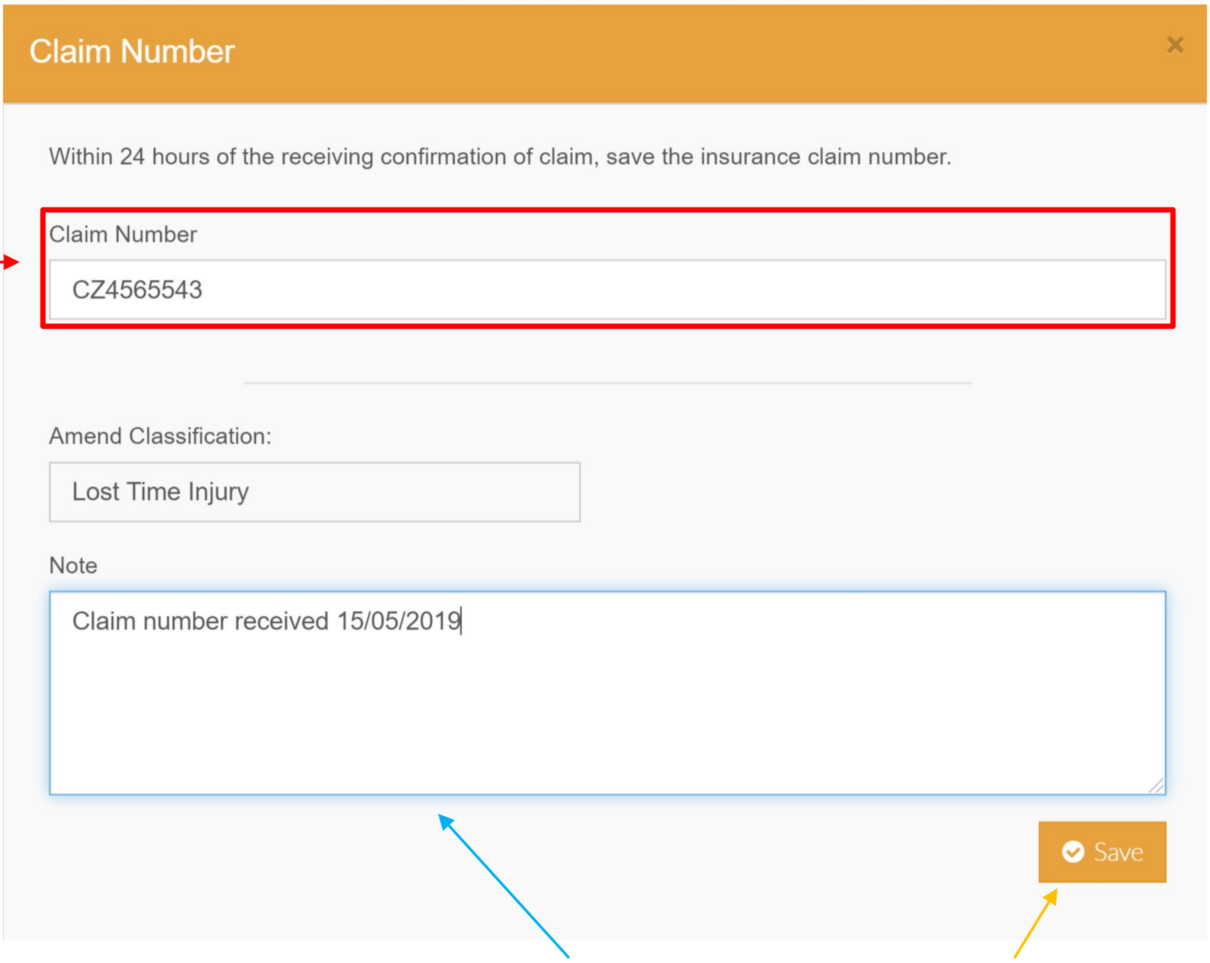
And ***CLICK*** the ‘Save’ button.

5. Claim Number Needed



After we have received the 'Notification Form' we should receive a 'Claim Number'.

To assign that number to this file we ***CLICK*** the 'Complete Step' button underneath '5. Claim Number Needed'.



ENTER the 'Claim Number' and ***ENTER*** any relevant notes. Following this, ***CLICK*** 'Save'.

The next step, can be completed in 2 ways:

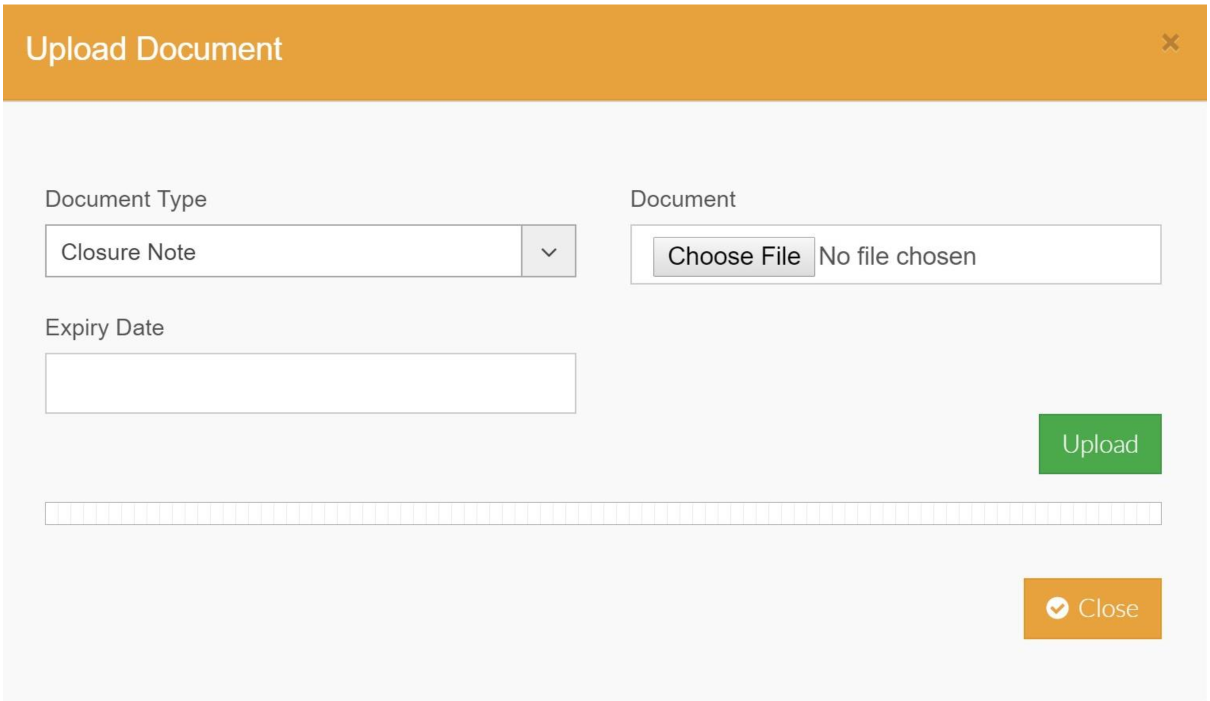
1. By faxing or emailing the 'GP Questionnaire' to the treating Dr immediately, or
2. By attending the next medical appointment with the injured worker (case conference) and requesting the Dr fill out the Questionnaire.

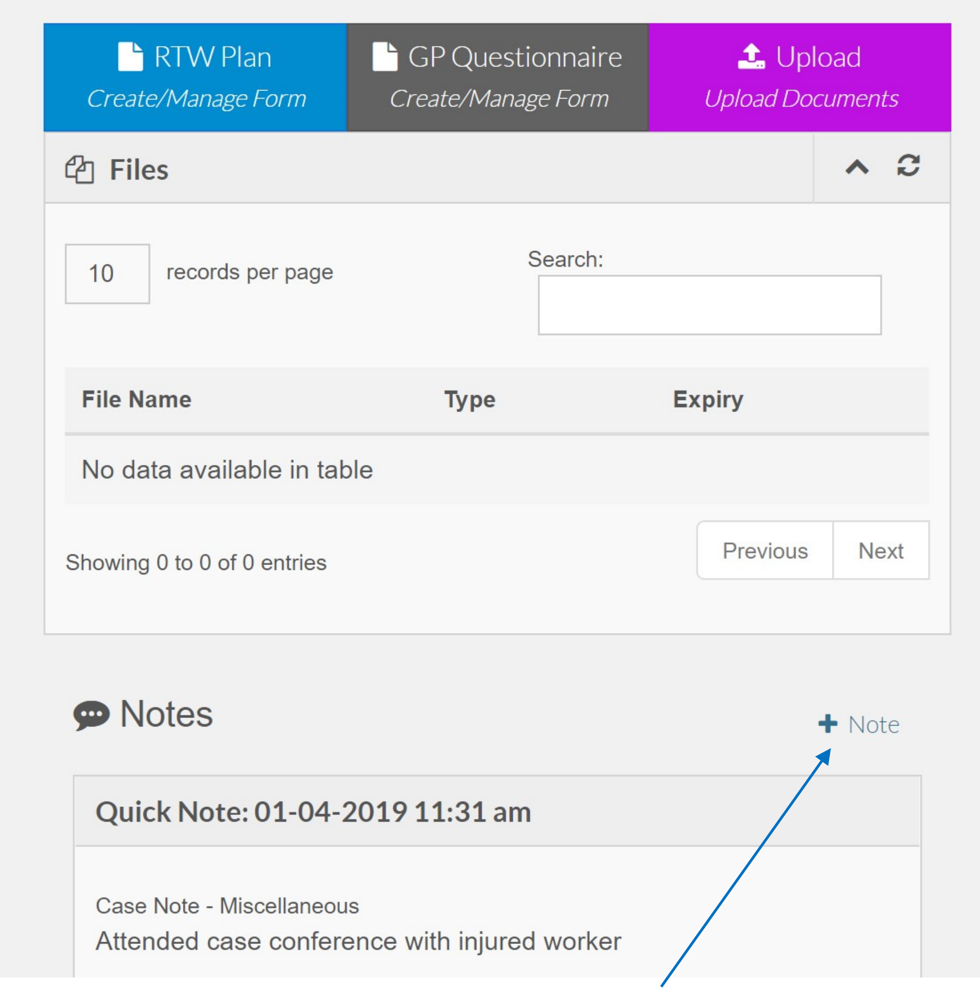
6. RTW Prognosis Questionnaire Needed

Once the questionnaire has been completed, follow the same process as previous steps by ***CLICKING*** 'Complete Step' under '6. RTW Prognosis Questionnaire Needed', enter any relevant notes and ***CLICK*** 'Save'.

To upload a PDF copy of the 'GP Questionnaire', ***CLICK*** the 'Upload' button on the right side of screen, ***SELECT*** 'Document Type', ***CLICK*** the 'Choose File' button and ***SELECT*** appropriate file on your computer.

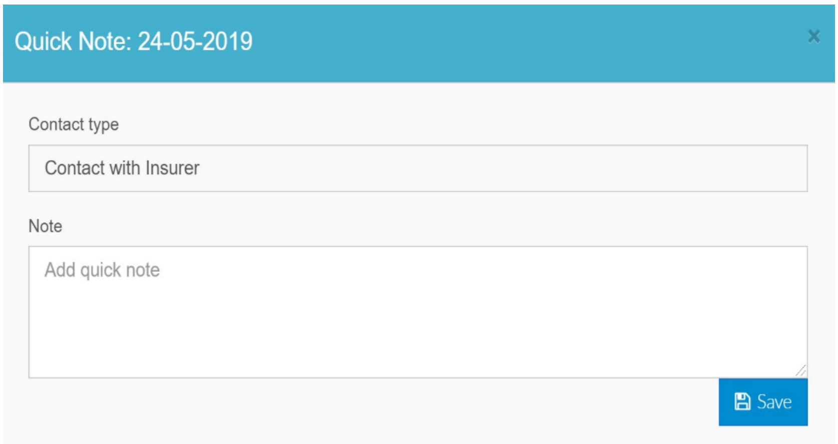
Following this, ***CLICK*** the 'Upload' button.





Also important to note (mind the pun), any phone calls, case conferences or anything requiring a note to be attached to this file can be done by ***CLICKING*** '+ Note'. This is incredibly useful to maintain the case file and keep all related notes stored in one place.

After ***CLICKING*** '+ Note', a pop-up will appear (as seen below).

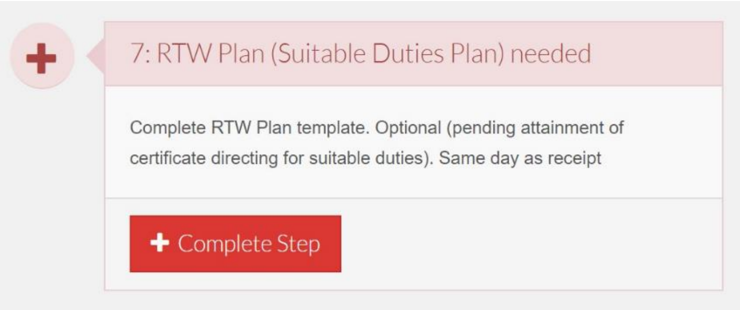


SELECT 'Contact Type'

ENTER any relevant notes or information related to this file.

CLICK 'Save'.

7. RTW Plan (Suitable Duties Plan) Needed

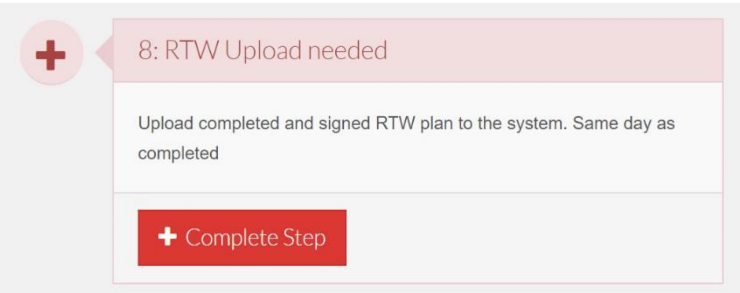


Once the worker is back to work in some sort of capacity, we need to develop RTW Plan(s) which include suitable duties that align with the restrictions on the Certificate of Capacity.

Using the 'RTW Plan' template we downloaded before, enter the appropriate information into the template. Included suitable duties and restrictions and get all relevant parties to sign off on the plan. Following this use the 'Upload' button to upload the RTW Plan to the file for records.

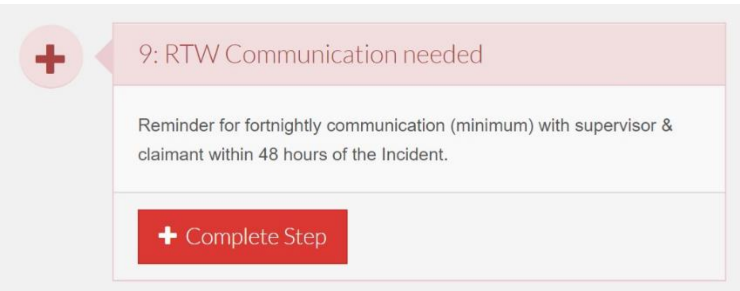
To complete this step, ***CLICK*** the 'Complete Step' button under '7. RTW Plan (Suitable Duties Plan) Needed', ***ENTER*** any relevant notes and ***CLICK*** 'Save'.

8. RTW Upload Needed



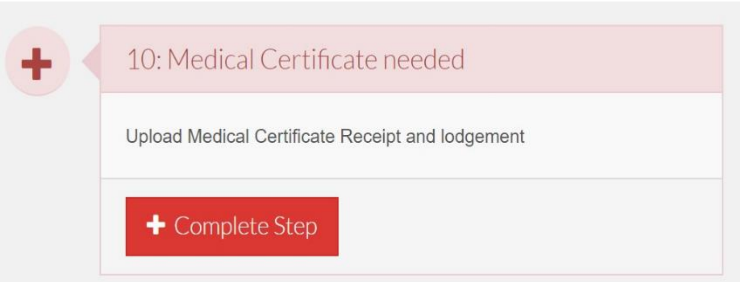
Another method to upload the RTW Plan is by completing this step. To complete this step, follow the same process as previous steps. But ***UPLOAD*** the RTWP via the upload section.

9. RTW Communication Needed



This step is to remind you to maintain communication with the worker and their supervisor during the RTW process. To complete this step, follow the same process as previous steps.

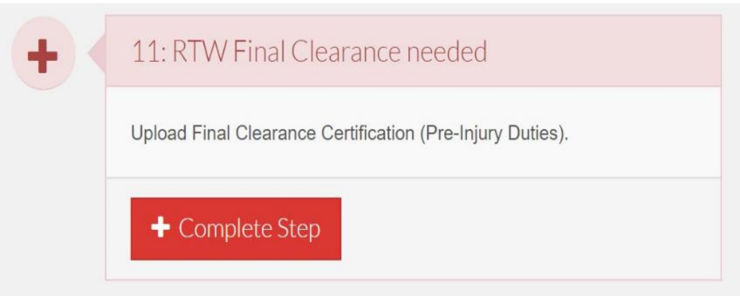
10. Medical Certificate Needed



At this stage of the process our worker is almost back to work completing 'Pre-Injury Duties' but hold your horses as we need to go through the correct process. We must upload the medical certificate.

This medical certificate will likely be Pre-Injury hours and minimal restrictions on the worker, but the doctor hasn't ticked the 'Is Fit for Pre-Injury Duties' option on the Certificate of Capacity. Nevertheless, we follow the same process as prior steps. ***UPLOAD*** the medical certificate using the upload section and ***ENTER*** any comments relevant to the claim.

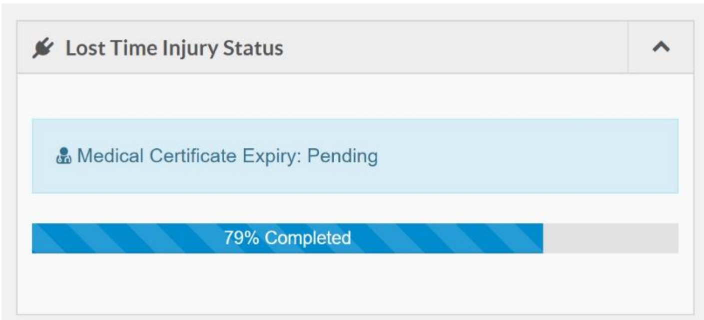
11. RTW Final Clearance Needed



At last, our worker is back to Pre-Injury capacity. This step requires us to upload the 'Final Certificate of Capacity' with the 'Pre-Injury Duties' option ticked from the workers treating doctor.

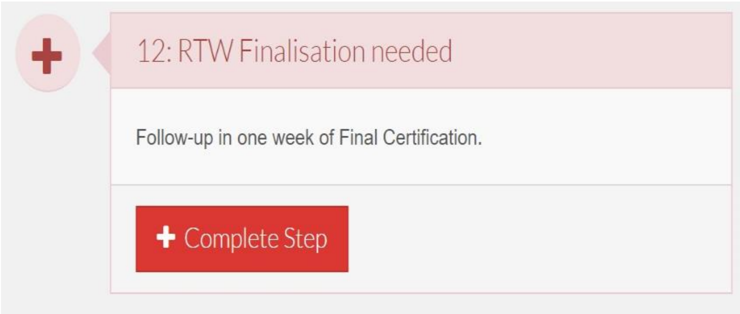
This certificate will have Pre-Injury hours and Duties listed and Nil restrictions on the worker. Same process as before, ***UPLOAD*** the Final Clearance Certificate using the upload section and ***ENTER*** any comments relevant to the claim.

We are not quite there yet, a few more steps to go to ensure our worker is back to optimum health and working efficiently. You may of noticed that during this whole process our progress bar in the top right of the page has been steadily increasing.



This is a handy little indicator of how far along the RTW process is for this claim. Especially handy if you have come into the process of managing this claim mid-way through. A quick glance over the page will give you a good overview of where the claim is currently up too. Each step we complete increases our progress bar and it continues to increase to completion.

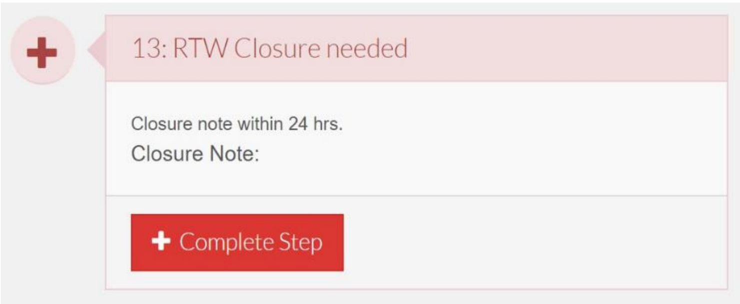
12. RTW Finalisation Needed



This step is to remind you to follow up with all involved parties one (1) week post final certificate. This is required for numerous reasons i.e. to ensure the worker is handling their duties and is not at further risk of injury etc.

We will contact the worker, their supervisor or manager, their treating doctor and the insurer to ensure all parties involved are on the same page. Once we have contacted and spoken to all parties, we can complete this step by ***CLICKING*** 'Complete Step' and ***ENTERING*** any relevant information discussed with all parties, then ***CLICK*** 'Save'.

13. RTW Closure Needed



The final step, closure of the RTW claim. Once we have completed the previous step, and all is progressing as planned, we will contact the insurer and request the claim file to be closed.

Following this request, we will receive a 'Notice of Closure' letter from the insurer (which we can upload to this claim file by utilizing the purple 'Upload' button discussed earlier), we will then ***CLICK*** 'Complete Step' and ***ENTER*** any relevant information detailed within the 'Closure Letter', and finally, ***CLICK*** 'Save'.

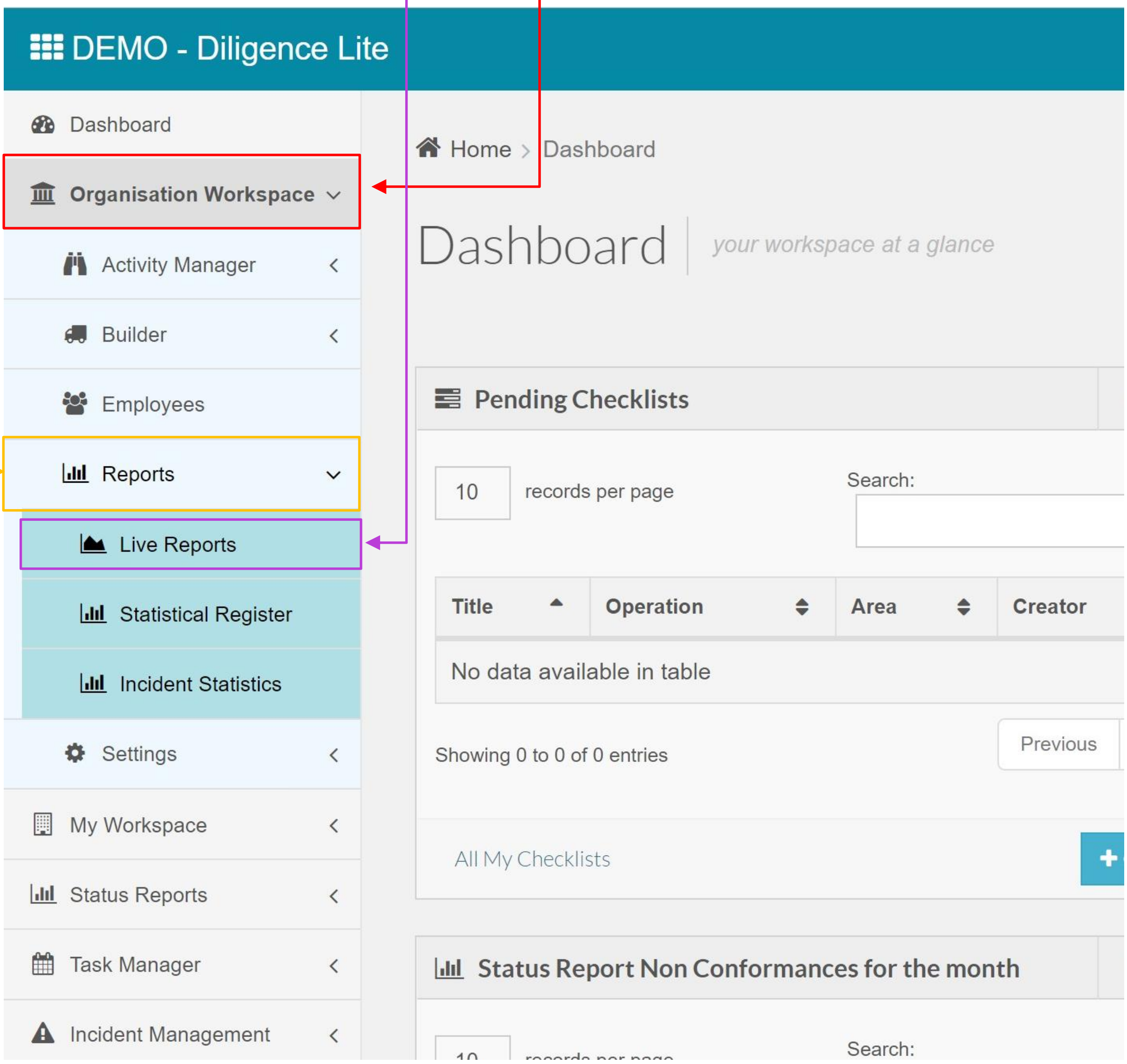
Congratulations, you have assisted your first injured worker from injury back to activity utilising the Diligence platform! You will now notice in the injury register, that the claim has been 'Closed'. We can still access and review the file by ***CLICKING*** the 'Open' link, just in case in requires any further review.

REPORTING

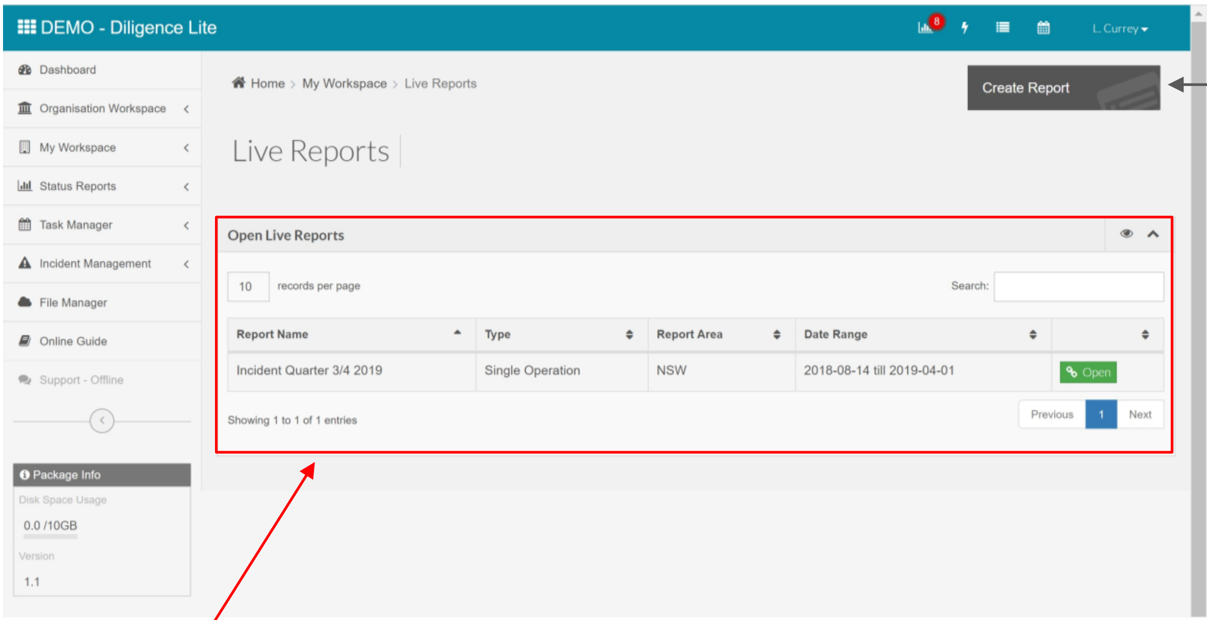
The reporting features within Diligence are numerous and constantly being improved. So, stay tuned for better, more use friendly and most importantly, prettier reporting features!

Reporting can be customized and tuned to your company's specific needs. As stated before, there are numerous reporting features in Diligence, this guide will teach you how to build a custom report to suit your needs (to access this side of reporting you will need to be set up as a Control user).

Reports can be found inside 'Organisation Workspace', ***CLICK*** 'Organisation Workspace', then ***CLICK*** 'Reports' and ***CLICK*** 'Live Reports'.



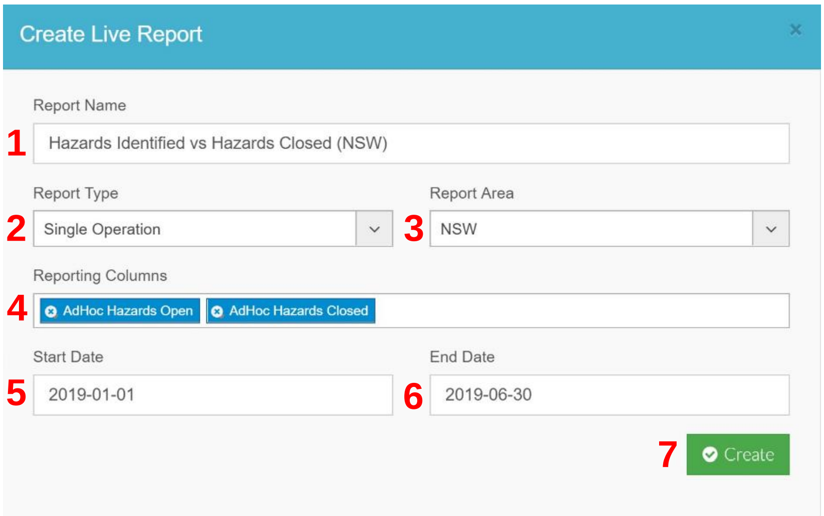
You will be taken to the ‘Live Reports’ screen (as seen below).



Any ‘Live Reports’ (aka. custom reports) you have created will be found here. If you wish to open a ‘Live Report’, ***CLICK*** the green ‘Open’ button.

But, lets dig in a create our own custom report by ***CLICKING*** the ‘Create Report’ button.

The below pop-up will appear. From here, we can name the report, select the report type (how many operations will be included), the report area, the reporting columns and the date range.



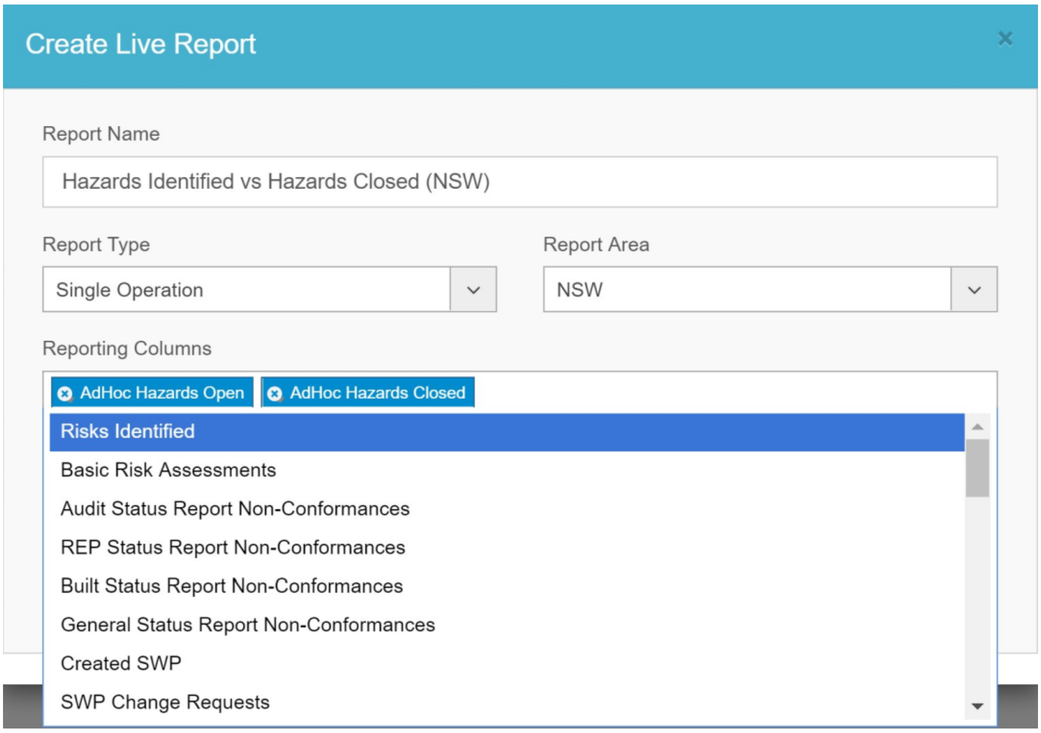
Live Report Steps:

1. ***ENTER*** the Report Name
2. ***SELECT*** Report Type
3. ***SLECT*** Report Area
4. ***SELECT*** what Columns will appear in your table / report*
5. ***SELECT*** a Start Date
6. ***SELECT*** an End Date
7. ***CLICK*** ‘Create’

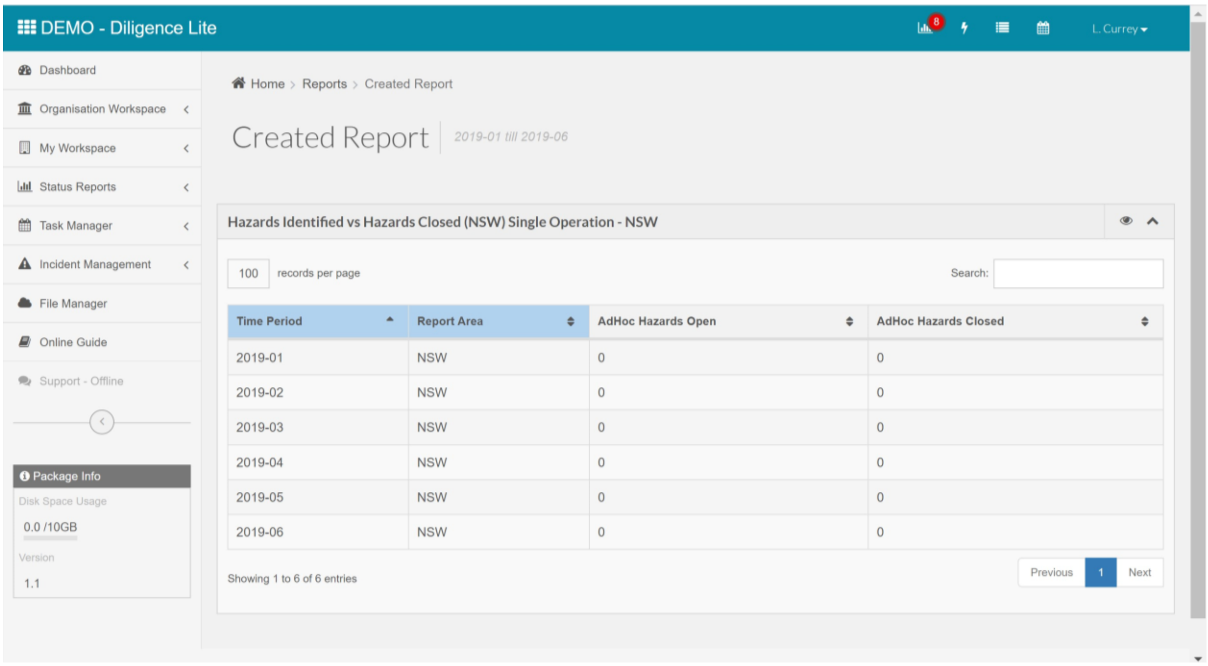
**See next page for a better idea of reporting columns.*

Done! You report has been created.

The below image will give you an understanding of some of the reporting options that can be selected for your custom report. But it's recommended you have an explore to see what options will suit your companies specific reporting needs.



After ***CLICKING*** 'Create' in Step 7, you will be taken to the 'Created Report' page (as seen below).



Now remember, the reporting features are constantly being reviewed and improved upon, so stay tuned for more!

APPENDIX I: DILIGENCE PREMIUM

Why Upgrade?

You get **MORE FEATURES**! Diligence Lite was just an appetizer, Diligence Premium has access to many more powerful and useful features to assist you in compliance…

How Do I Upgrade?

Get in contact with your Recovery Partners consultant today to discuss unlocking the full Diligence suite of features and take safety in you company to the next level.

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Recovery Partners