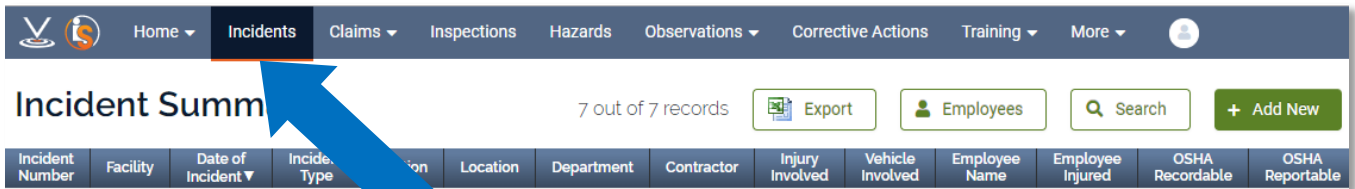


# IndustrySafe Corrective Action Reporting Guide

This guide describes the process for reporting claims using the IndustrySafe Safety Management Software.

## 1 Add a Corrective Action to an Incident Record

1.1 Click on the **Incidents** module.



1.2 Locate the incident in the summary screen and click on the **Incident Number** link.

Incident Summary 7 out of 7 records




Incident Number	Facility	Date of Incident	Incident Type	Section	Location	Department	Contractor	Injury Involved	Vehicle Involved	Employee Name	Employee Injured	OSHA Recordable	OSHA Reportable
<a href="#">FY19-00098</a>	Facility F-001	11/26/2019	Employee Injury	Section Eight	Location Nine	Administration		Yes	Yes	Anastasiya Krasikova	Yes	Yes	No
<a href="#">FY19-00097</a>	Facility F-174	11/15/2019	Employee Injury	Section Eight	East Falls	Department3	A wonderful serenity has taken possession of my entire soul, like these sweet morning	Yes	Yes	Elizabeth Moon	Yes	No	No
<a href="#">FY19-00096</a>	Facility F-072	11/13/2019	Employee Injury	Section Eight	Location Eight	Department2		Yes	Yes	Shamar Bruce	Yes	Yes	No
<a href="#">FY19-00094</a>	Facility F-072	11/12/2019	Employee Injury	Section Eight	Location Eight	Department1		No	Yes	Amaris Alexander	No	No	No
<a href="#">FY19-00091</a>	Facility F-014	11/11/2019	First Aid Only	Section Eight	Location Eight	Department5	Allen Tate Company213 c	No	No	Kamen Andersen	No	No	No
<a href="#">FY19-00092</a>	Facility F-178	11/11/2019	First Aid Only	Section Eight	Location Eight	Department1	NewName11	No	Yes	Taniyah Andrade	No	No	No
<a href="#">FY19-00093</a>	Facility F-178	11/11/2019	First Aid Only	Section Eight	Location Eight	Department1	NewName11	No	Yes	Taniyah Andrade	No	No	No


1.3 Click on the **Incident Investigation** link on the Incident Information Form page.

Incident: FY19-00097      11/15/2019      Employee Injury

**Involved Employee: Elizabeth Moon - Employee**

[Add](#) [Delete](#)

[Initial Incident Form](#)   
[Employee Form - Open](#)   
[Incident Investigation Form - Open](#) 



**Incident Status**

Occurred: 18 days ago at Facility F-174

Date Created: 11/15/2019 04:42 PM  
Date Last Modified: 11/19/2019 06:02 AM  
Last Modified By: Nirav Patel

There have been 1 incident at this location in the last 30 days.

**Corrective Actions**

[1860 - Open](#)  
[1840 - Open](#)

1.4 Scroll to the bottom of the form and click the **Add Corrective Action** button.

**Additional Features** Top

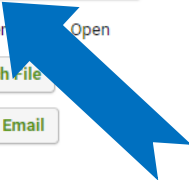
Claims [Add Claim](#)

Corrective Actions [Add Corrective Action](#)

[1840 Open](#) [Open](#)

Attachments [Attach File](#)

Emails [Send Email](#)



[Save](#) [Back](#) [Close](#) [Print](#)

The incident form will be saved and pertinent information will be copied to the corrective action form. See section four for the steps to complete the corrective action form.

## 2 Add a Corrective Action to other Modules

2.1 Click on any module, for example, the **Inspections** module

System ID	Facility	Date	Category	Checklist	Section	Location	Department	Investigator	Manager	Status	% Compliant	Corrective Actions
2541	Candice Test Facility	12/02/2019	Safety Inspections	Construction Site			(none)	CJ Lambert		Open	0	1 Identified - 0 Open
2521	Facility F-043	11/19/2019	Safety Inspections	General Safety			(none)	Dina D		Open	0	
2501		11/18/2019	Safety Inspections	Construction Site			(none)			Open	0	
2481	Facility F-195	11/13/2019	Safety Inspections	Another Name			Department2	Karolina Kiselyova		Open	0	1 Identified - 1 Open

2.2 Locate the inspection in the summary screen and click on the **System ID** link.

System ID	Facility	Date	Category	Checklist	Section	Location	Department	Investigator	Manager	Status	% Compliant	Corrective Actions
<a href="#">2541</a>	Candice Test Facility	12/02/2019	Safety Inspections	Construction Site			(none)	CJ Lambert		Open	0	1 Identified - 0 Open
<a href="#">2521</a>	Facility F-043	11/19/2019	Safety Inspections	General Safety			(none)	Dina D		Open	0	
<a href="#">2501</a>		11/18/2019	Safety Inspections	Construction Site			(none)			Open	0	
<a href="#">2481</a>	Facility F-195	11/13/2019	Safety Inspections	Another Name			Department2	Karolina Kiselyova		Open	0	1 Identified - 1 Open

2.3 Scroll to the section above the checklist and click the **Add Corrective Action** button.

**Additional Features**

- Hazards [Add Hazard](#)
- Corrective Actions [Add Corrective Action](#)
- 1900 Open [Add Corrective Action](#)
- Attachments [Attach File](#)
- Emails [Send Email](#)

For Ex. The inspection form will be saved and pertinent information will be copied to the corrective action form. See section seven for the steps to complete the corrective action form.

### 3 Add an Unlinked Corrective Action

#### 3.1 Click on the **Corrective Actions** module

The screenshot shows the 'Corrective Actions Summary' page. The top navigation bar includes 'Home', 'Incidents', 'Hazards', 'Observations', 'Corrective Actions', 'Training', 'Dashboard', and 'Reports'. The 'Corrective Actions' tab is highlighted. Below the navigation bar, the page title is 'Corrective Actions Summary' with '10 out of 10 records' and buttons for 'Export', 'Search', and '+ Add New'. A table lists corrective actions with columns: System ID, Facility, Originating System ID, Originating Type, Date Identified, Section, Location, Responsible Party, Investigator, Source, Estimated Completion Date, Status, Number of Days, and Closed. A blue arrow points to the 'Corrective Actions' tab in the navigation bar.

System ID	Facility	Originating System ID	Originating Type▲	Date Identified	Section	Location	Responsible Party	Investigator	Source	Estimated Completion Date	Status	Number of Days	Closed
1804	Facility F-101	1283	Hazard	11/05/2019			Kellen Brewer	Greg Ciafre		11/13/2019	Open	-21	Open
1880	Facility F-017	FY19-00088	Incident	11/19/2019			Greg Ciafre	Anastasiya (admin) Krasikova		11/30/2019	Complete		Open
1881	Facility F-072	FY19-00096	Incident	11/19/2019	Section Eight	Location Eight	Kellen Brewer	Nirav Patel		02/09/2020	Open	67	Open
1860	Facility F-174	FY19-00097	Incident	11/18/2019	Section Eight	East Falls		Bhagyashree Gondaliya			Open		Open
1840	Facility F-174	FY19-00097	Incident	11/15/2019	Section Eight	East Falls	User to check add to class	Elizabeth Munz	Internal Review	11/29/2019	Open	-5	Open

#### 3.2 Click the green **Add New** button on the top right-hand corner.

The screenshot shows the 'Corrective Actions Summary' page, identical to the previous one. A blue arrow points to the '+ Add New' button in the top right-hand corner of the page.

## 4 Complete the Corrective Action Form

### 4.1 Enter the Basic Information

Corrective Action Recording Form:

[Basic Information](#) | [Asset Information](#) | [Resolution & Responsibility](#) | [Additional Features](#) | [History Section](#)

**Basic Information**
Top

Originating Type	Unlinked
Division *	<input type="text"/>
Facility *	<input type="text"/>
Section	<input type="text"/>
Location	<input type="text"/>
Date Identified *	12/4/2019 <input type="text"/>
Department	<input type="text"/>
Source	<input type="text"/>
Severity <input type="text"/>	<input type="text"/>
Probability <input type="text"/>	<input type="text"/>
Risk Assessment <input type="text"/>	<input type="text"/>

**Note:** If you are adding a linked corrective action, data from the originating record will be copied over to the corrective action form. The originating record type and system ID will be identified at the top of the Basic Information section.

### 4.2 Assign a Responsible Party and enter a Due Date

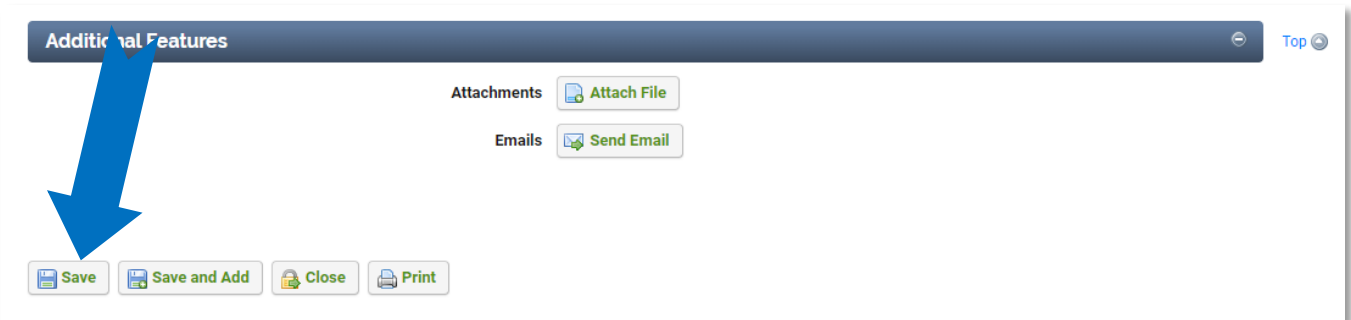
**Resolution & Responsibility**
Top

Responsible Party * <input type="text"/>	<input type="text"/>
Phone Number	<input type="text"/>
Second Level Responsible Party <small>For Overdue Notifications</small>	<input type="text"/>
Third Level Responsible Party <small>For Final Overdue Notification</small>	<input type="text"/>
Estimated Start Date *	mm/dd/yyyy <input type="text"/>
Estimated Completion Date *	mm/dd/yyyy <input type="text"/>
Status	Open

**Note:** The Responsible Party will receive an email alert letting them know that they have been assigned a Corrective Action, as well as before it comes due and

if it goes overdue. If you select a Second or Third Level Responsible Party, they will be alerted if the corrective action goes over due.

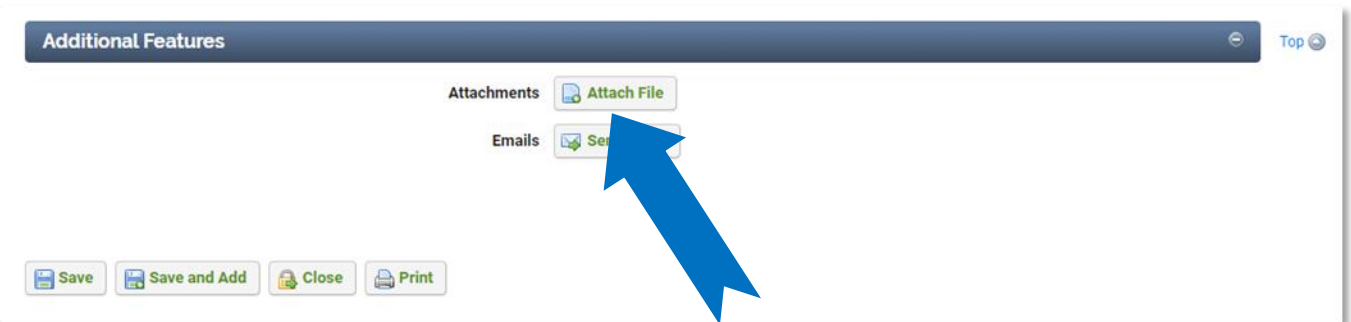
### 4.3 Save the Form



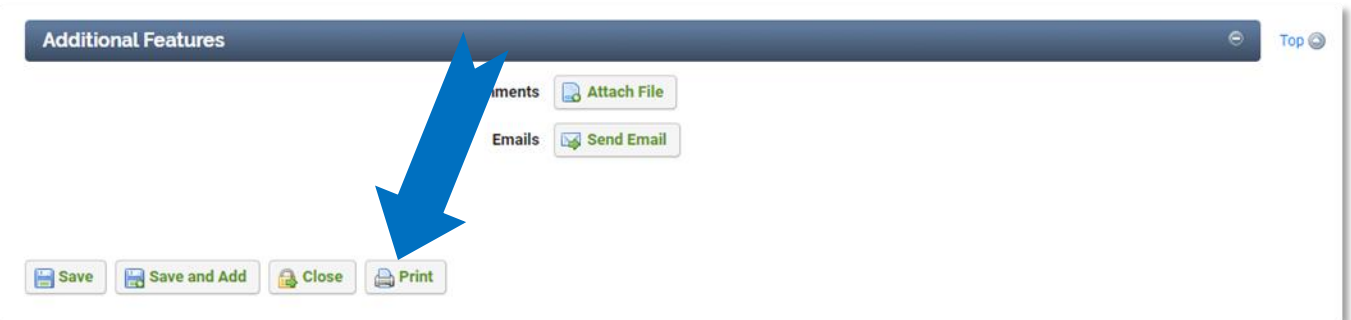
**Note:** To add an additional corrective action, click the **Save and Add** button. Doing this will save the current corrective action and copy the basic information to a new record.

## 5 Additional Features

5.1 To attach supporting documents (Photos, etc.), click the **Attach File** button.



5.2 To view a print-out of the incident, click the **Print** button.



## 6 General Notes about IndustrySafe

- Fields with a red \* are required.
- Ensure that your browser allows pop-ups from IndustrySafe. This is required for certain features such as printing reports and attaching supporting documents.
- You may save the form at any time to ensure that you do not lose your work (even if you have not completed all required fields).
- If you do not save or refresh the screen for 30 minutes you will be logged out due to inactivity. Upon automatic logout, any form that you may have open on the screen will be saved. A pop-up will alert you before this happens.
- Additional help may be obtained by clicking the Help icon within the navigation pane at the top of the screen.

