

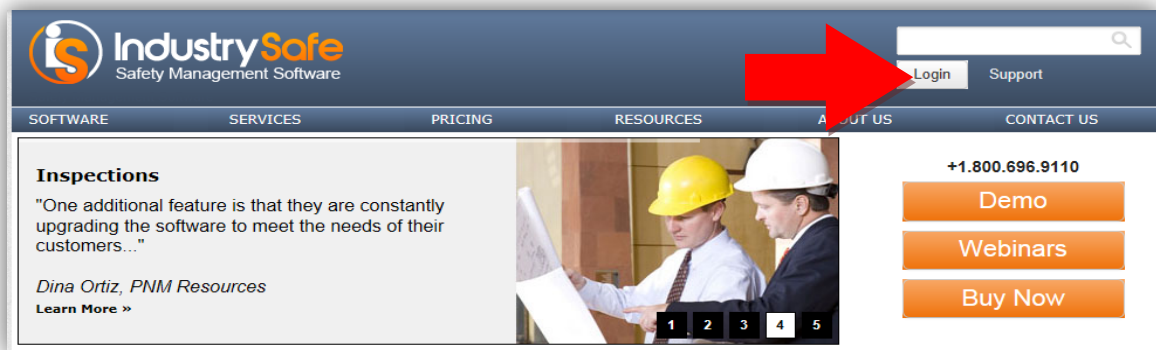
# IndustrySafe Claims Reporting Guide

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

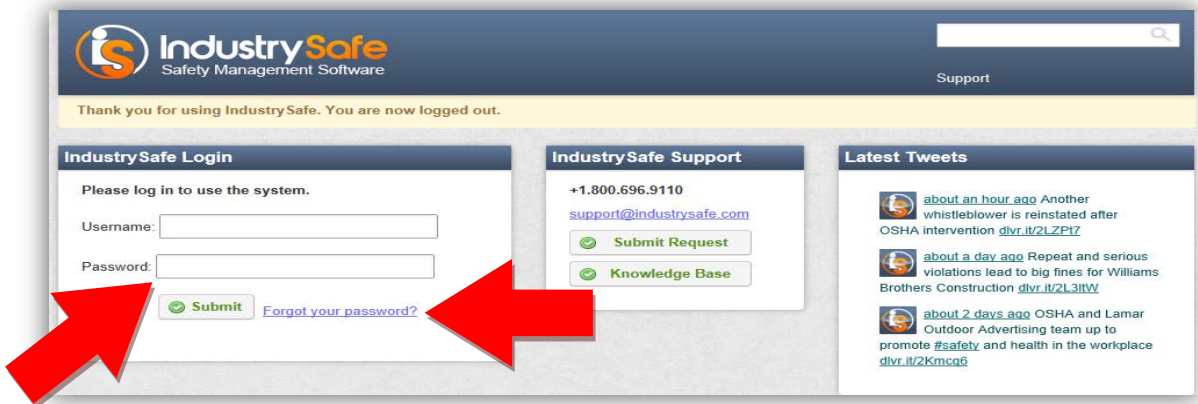
## 1 Log in to IndustrySafe

1.1 Using your preferred browser, go to <http://www.industrysafe.com>

1.2 Click on the **Login** button at the top right corner of the page.



1.3 Enter your username and password and click the **Submit** button.



**Note:** If you forget your username or password, click the **Forgot your password?** button to have your username and a new password emailed to you. The next time you log in you will be asked to change your password.

## 2 Add a Claim through the Incidents Module

Follow the steps below to add a claim directly from the Incident Investigation from in the Incidents module. An incident record must exist before you can add a claim.

### 2.1 Click on the **Incidents** tab

Home	Dashboard	Incidents	Claims	Inspections	Hazards	Observations	Corrective Actions	Training
	Reports & Analysis	Regulatory Reports	Employees	Facility1 Profile				
Incident Summary 12 out of 12 records								
Incident Number	Facility1	Date of Incident	Incident Type	Subcontractor	Location			
<a href="#">FY13-0028</a>	Racine-WI	09/28/2012	Hazardous Material Spill	Computer				
<a href="#">FY13-0027</a>	Racine-WI	09/19/2012	Operational Malfunction					
<a href="#">FY13-0025</a>	George-MS	09/13/2012	Environmental Incident					
<a href="#">FY13-0026</a>	Lauderdale-AL	09/13/2012	Hazardous Material Spill					
<a href="#">FY13-0022</a>	Washington Marketing Facility	09/13/2012	Employee Injury					
<a href="#">FY13-0024</a>	Washington Marketing Facility	09/13/2012	Employee Injury					

### 2.2 Locate the incident in the summary screen that you wish to add a claim to and click on the **Incident Number** link.

Home	Dashboard	Incidents	Claims	Inspections	Hazards	Observations	Corrective Actions	Training
	Reports & Analysis	Regulatory Reports	Employees	Facility1 Profile				
Incident Summary 12 out of 12 records								
Incident Number	Facility1	Date of Incident	Incident Type	Subcontractor	Location			
<a href="#">FY13-0028</a>	Racine-WI	09/28/2012	Hazardous Material Spill	Computer				
<a href="#">FY13-0027</a>	Racine-WI	09/19/2012	Operational Malfunction					
<a href="#">FY13-0025</a>	George-MS	09/13/2012	Environmental Incident					
<a href="#">FY13-0026</a>	Lauderdale-AL	09/13/2012	Hazardous Material Spill					
<a href="#">FY13-0022</a>	Washington Marketing Facility	09/13/2012	Employee Injury					
<a href="#">FY13-0024</a>	Washington Marketing Facility	09/13/2012	Employee Injury					

2.3 Click on the **Incident Investigation** link on the Incident Information page.

Home Dashboard **Incidents** Claims Inspections Hazards Observations Corrective Actions Training

+ Reports & Analysis ▾ Regulatory Reports ▾ Employees Facility1 Profile

**Incident: FY13-0027** **9/19/2012** **Operational Malfunction**

**Involved Employee: Scott Kaminski - Shop Foreman**

+ Add ▾ - Delete

[New Incident Form](#)

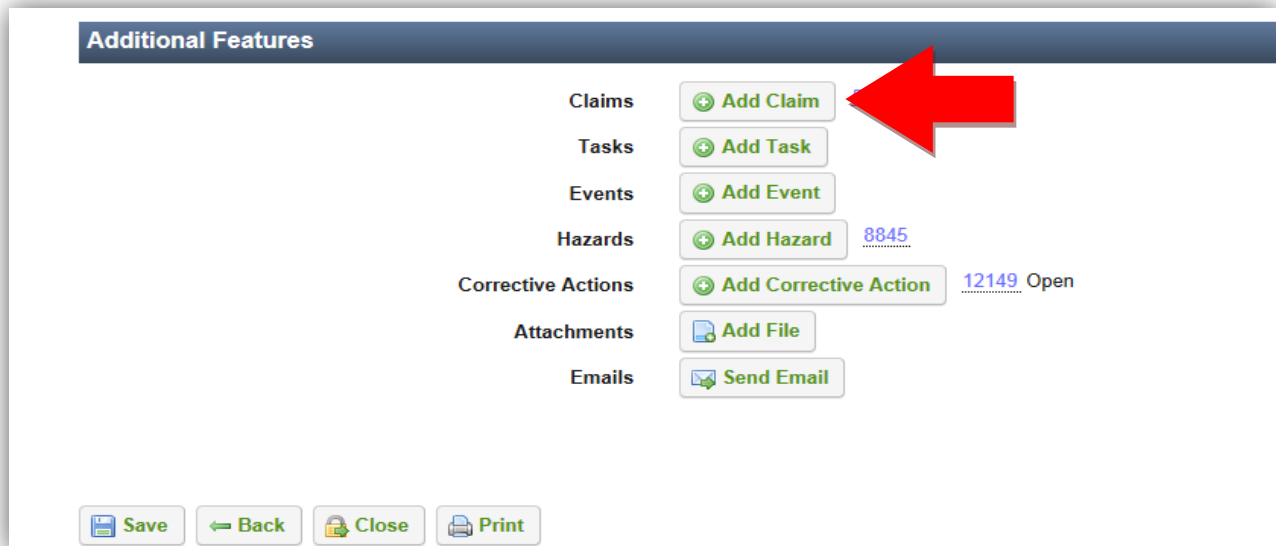
[Incident Investigation - Open](#)

**Corrective Actions** **Claims** **Hazards**

[12149 - Open](#) [5660 - Open](#) [8845 - Open](#)

**Note:** If you do not see the **Incident Investigation** link click on the **New Incident Form** and check off the box for **Incident Investigation**.

2.4 Scroll to the bottom of the form and click the **Add Claim** button.



**Additional Features**

- Claims: [Add Claim](#)
- Tasks: [Add Task](#)
- Events: [Add Event](#)
- Hazards: [Add Hazard](#) 8845
- Corrective Actions: [Add Corrective Action](#) 12149 Open
- Attachments: [Add File](#)
- Emails: [Send Email](#)

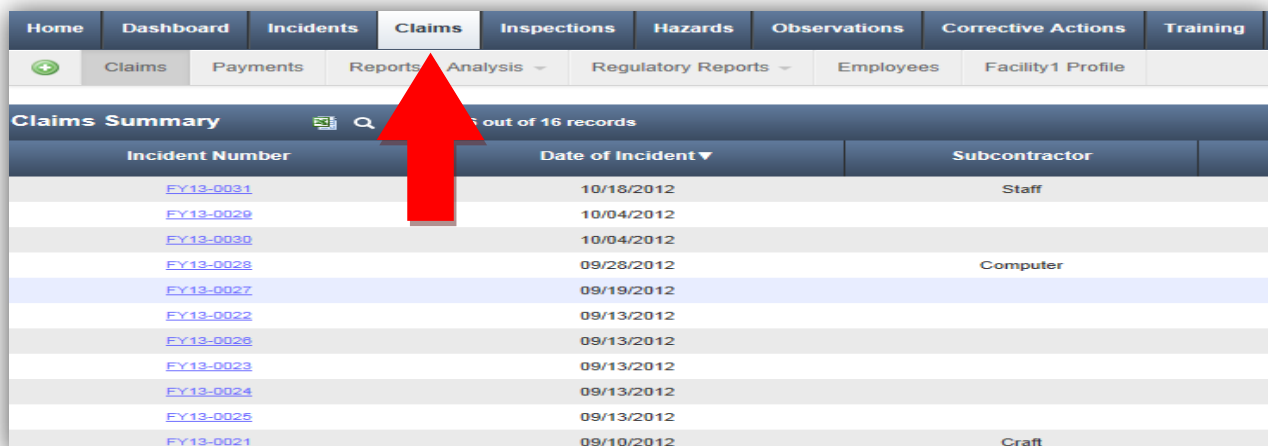
Save Back Close Print

The incident form will be saved and the Select Type of Claim screen will open. See section four for the steps to complete the claim form.

### 3 Add a Claim through the Claims Module

Claims may also be added directly in the Claims module. An incident record must be created in the incidents module before a claim may be added in the claims module.

3.1 Click on the **Claims** module



Home	Dashboard	Incidents	Claims	Inspections	Hazards	Observations	Corrective Actions	Training
<a href="#">Claims</a>	<a href="#">Payments</a>	<a href="#">Reports</a>	<a href="#">Analysis</a>	<a href="#">Regulatory Reports</a>	<a href="#">Employees</a>	<a href="#">Facility1 Profile</a>		
<b>Claims Summary</b> <a href="#">Q</a> 1 out of 16 records								
Incident Number	Date of Incident	Subcontractor						
<a href="#">FY13-0031</a>	10/18/2012	Staff						
<a href="#">FY13-0029</a>	10/04/2012							
<a href="#">FY13-0030</a>	10/04/2012							
<a href="#">FY13-0028</a>	09/28/2012	Computer						
<a href="#">FY13-0027</a>	09/19/2012							
<a href="#">FY13-0022</a>	09/13/2012							
<a href="#">FY13-0026</a>	09/13/2012							
<a href="#">FY13-0023</a>	09/13/2012							
<a href="#">FY13-0024</a>	09/13/2012							
<a href="#">FY13-0025</a>	09/13/2012							
<a href="#">FY13-0021</a>	09/10/2012	Craft						

3.2 Locate the incident in the summary screen that you wish to add a claim to and click on the **Incident Number** link.

Home	Dashboard	Incidents	Claims	Inspections	Hazards	Observations	Corrective Actions	Training
	Claims	Payments	Reports & Analysis	Regulatory Reports	Employees	Facility1 Profile		
<b>Claims Summary</b> 16 out of 16 records								
Incident Number	Date of Incident ▼	Subcontractor						
<a href="#">FY13-0031</a>	10/18/2012	Staff						
<a href="#">FY13-0029</a>	10/04/2012							
<a href="#">FY13-0030</a>	10/04/2012							
<a href="#">FY13-0028</a>	09/28/2012	Computer						
<a href="#">FY13-0027</a>	09/19/2012							
<a href="#">FY13-0022</a>	09/13/2012							
<a href="#">FY13-0026</a>	09/13/2012							
<a href="#">FY13-0023</a>	09/13/2012							
<a href="#">FY13-0024</a>	09/13/2012							
<a href="#">FY13-0025</a>	09/13/2012							
<a href="#">FY13-0021</a>	09/10/2012	Craft						

3.3 Click on the green and white addition sign icon, and then click **Add Claim**.

Home
Dashboard
Incidents
Claims
Inspections
Hazards
Observations
Corrective Actions
Training
Industrial Hygiene
Security

+
Claims
Payments
Reports & Analysis
Regulatory Reports
Employees
Facility1 Profile

Add Claim
Add Payment

Incident - Incident Number: FY13-0028
View Incident Forms
2 out of 2 records

Claim Number	Date Claim Initiated	Type of Claim	Claimant
<a href="#">5680</a>		Worker's Comp	New Person
<a href="#">5700</a>	10/01/2012	Auto Claim	teybe 3 6 56yryh

### Claims Statistics

Number of Claims:	2
Total Reserves:	\$0.00
Total Paid:	\$0.00
Total Outstanding:	\$0.00

## 4 Complete the Claim Form

4.1 Select the Type of Claim and click the **Continue** button.

The screenshot shows the 'Claims' section of the IndustrySafe application. The 'Type of Claim' dropdown menu is open, displaying three options: 'Auto Claim', 'General Claim', and 'Worker's Comp'. A red arrow labeled '1' points to this dropdown menu. Another red arrow labeled '2' points to the 'Continue' button, which is located above the dropdown menu.


4.2 Review the information copied from the incident form and complete the additional fields.

When the claim form opens, as much information as possible will be copied from the incident form to the claim form. The more complete the Incident Investigation form is when the claim is added, the less you will have to complete on the claims form.

Most fields in the sections below are populated with information from the Incident Investigation form or the employee's profile.

- Basic Information
- Injury/Incident Location
- Employee Injury (Worker's Comp Claims Only)
- Witness Information
- Lost Time and Wage Information (Worker's Comp Claims Only)
- Employee Medical / Medical Provider Information
- Vehicle Information (Auto Claims Only)

#### 4.3 Complete the Employee/Employment Information section (Worker's Comp Claims Only).

Employee/Employment Information	
Employment Status Code *	<input type="text"/>
State of Hire *	<input type="text"/>
Payroll State *	<input type="text"/>
Date Employee Started in Current Position	<input type="text" value="mm/dd/yyyy"/> 
Was Employee doing his Regular Job? *	<input type="text"/>
Days Worked per Week *	<input type="checkbox"/> Sunday <input type="checkbox"/> Monday <input type="checkbox"/> Tuesday <input type="checkbox"/> Wednesday <input type="checkbox"/> Thursday <input type="checkbox"/> Friday <input type="checkbox"/> Saturday
Number of Hours Worked per Day *	<input type="text"/>
Time Work Began? *	<input type="text" value="HHMM"/>
Number of Dependents	<input type="text"/>

**Note:** Some of the fields in this section will automatically be filled in if they are saved with the employee's profile. Review all information in this section and complete the remaining fields.

#### 4.4 Complete the Claimant Information section (General and Auto Claims Only).

Claimant Information	
Claimant's Name *	<input type="text"/>
Claimant's Address	<input type="text"/>
Claimant's City	<input type="text"/>
Claimant's State	<input type="text" value="▼"/>
Claimant's Zip	<input type="text"/>
Claimant's Home Phone	<input type="text"/>
Claimant's Work Phone	<input type="text"/>
Nature of Claim	<input type="text"/>
Insurance Company	<input type="text"/>
Phone Number	<input type="text"/>
Name of Policy Holder	<input type="text"/>

#### 4.5 Complete the Property Damage Detail section (General and Auto Claims Only).

Property Damage Detail	
Number of Items	<input type="text" value="1"/>
	Item 1
Age of Item	<input type="text"/>
Repair Cost	<input type="text"/>
Replacement Cost	<input type="text"/>

**Note:** Enter the number of damaged items in the first field and then complete the Damaged Item sub-form for each item.



#### 4.6 Complete the Claim Inquiry Loss section.

Claims Inquiry Loss

Claim Diary

Claim Diary

Number of Diary Entries

	Total Reserves	Total Paid	Total Outstanding
Medical	\$ 0	\$	\$ 0
Non-Medical	\$ 0	\$ 0	\$ 0
Expenses	\$ 0	\$ 0	\$ 0
Other	\$ 0	\$ 0	\$ 0
Total cost of claims	\$ 0	\$ 0	\$ 0

**Note:** Click the **Claim Diary** button to review and add diary entries. The fields shaded in grey will automatically be filled in when payments are linked to the claim.

#### 4.7 Complete the Administration and Claim Notes section.

Administration & Claim Notes

Claim Notes

Contact Employee ID

101

Contact Name

Gabriel Tompkins

Contact Title

Project Manager

Contact Phone Number \*

215-546-9110

Date Form Last Updated

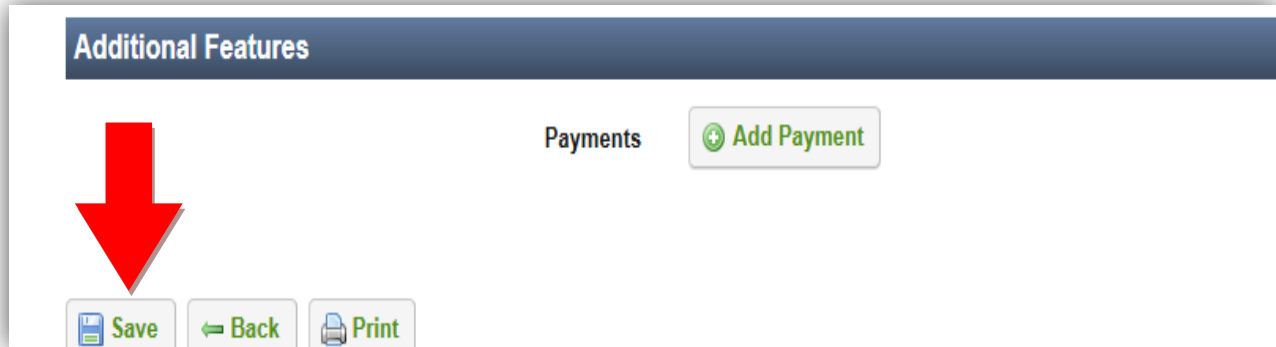
Claim Status \*

Open

**Note:** The contact information will be populated with the ID, Name, and Title of the user completing the form. To change this information, delete the name and start typing a new one to search for the correct person.

The Date Form Last Updated will automatically be populated with the current date when the form is saved.

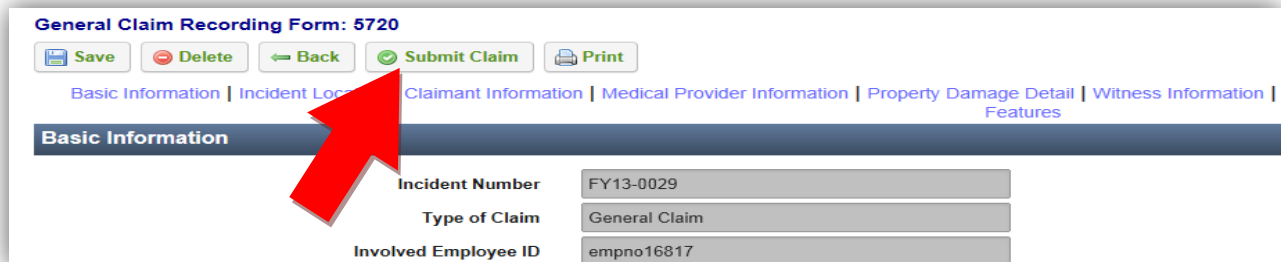
#### 4.8 Save the form.



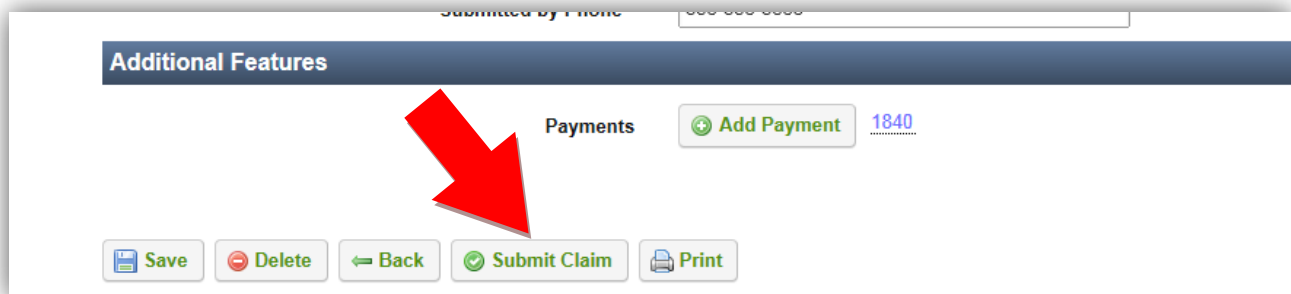
The screenshot shows the 'Additional Features' section of a web form. At the top, there is a dark blue header with the text 'Additional Features'. Below this, on the left, is a large red arrow pointing downwards towards the 'Save' button. To the right of the arrow, there is a 'Payments' section with an 'Add Payment' button. At the bottom of the section, there are three buttons: 'Save', 'Back', and 'Print'.

#### 4.9 Submit the Claim.

When all the information for the claim has been entered, enter the phone number of the person submitting the claim and click the **Submit Claim** button at the top or bottom of the form.



The screenshot shows the 'General Claim Recording Form: 5720'. At the top, there is a dark blue header with the text 'General Claim Recording Form: 5720'. Below this, there are several buttons: 'Save', 'Delete', 'Back', 'Submit Claim', and 'Print'. A red arrow points to the 'Submit Claim' button. Below the buttons, there are several tabs: 'Basic Information', 'Incident Location', 'Claimant Information', 'Medical Provider Information', 'Property Damage Detail', 'Witness Information', and 'Features'. The 'Basic Information' tab is selected. Below the tabs, there are three input fields: 'Incident Number' (FY13-0029), 'Type of Claim' (General Claim), and 'Involved Employee ID' (empno16817).

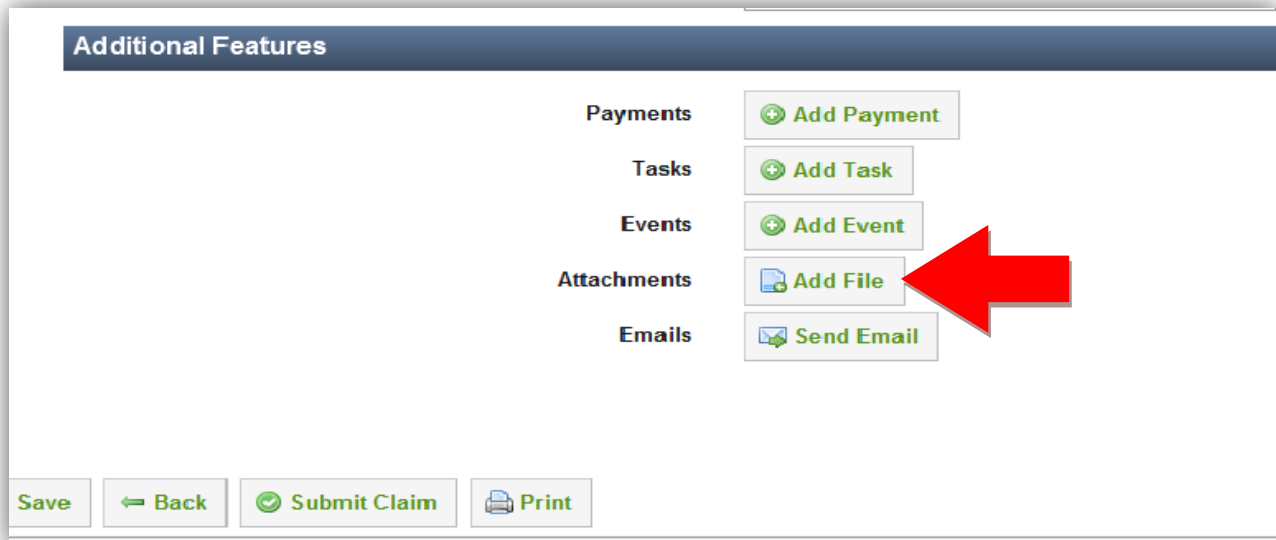


The screenshot shows the 'Additional Features' section of a web form. At the top, there is a dark blue header with the text 'Additional Features'. Below this, on the left, is a large red arrow pointing downwards towards the 'Submit Claim' button. To the right of the arrow, there is a 'Payments' section with an 'Add Payment' button and a phone number '1840'. At the bottom of the section, there are five buttons: 'Save', 'Delete', 'Back', 'Submit Claim', and 'Print'.

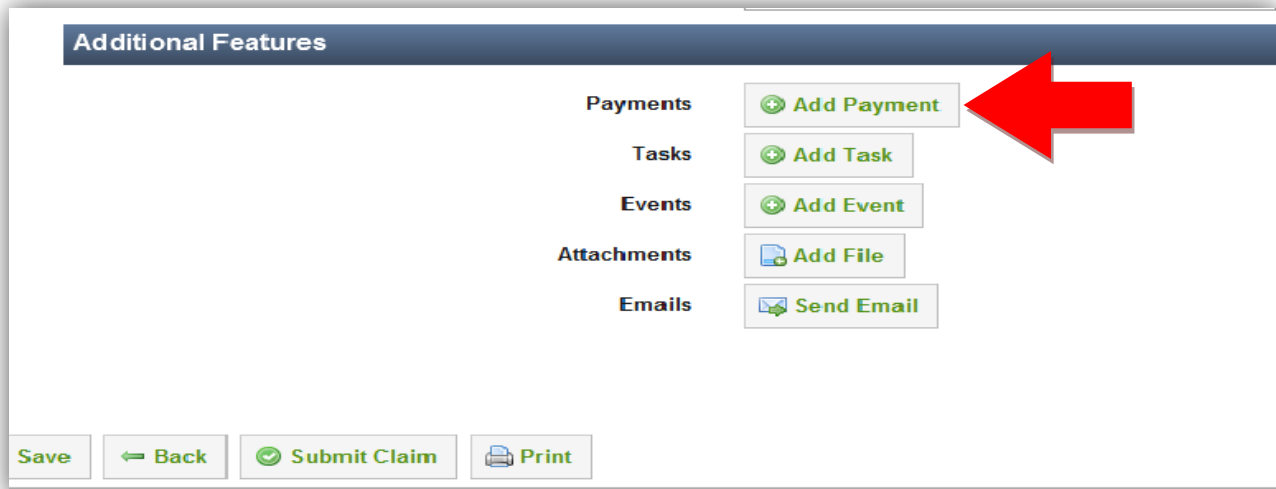
**Note:** Once a claim has been submitted, it will be read only and changes cannot be made unless an Administrator reopens the claim. If an integration with an insurance carrier or third-party administrator has been setup, the information for the claim will be sent to them after you click the **Yes** button on the Submit Claim confirmation screen.

## 5 Additional Features

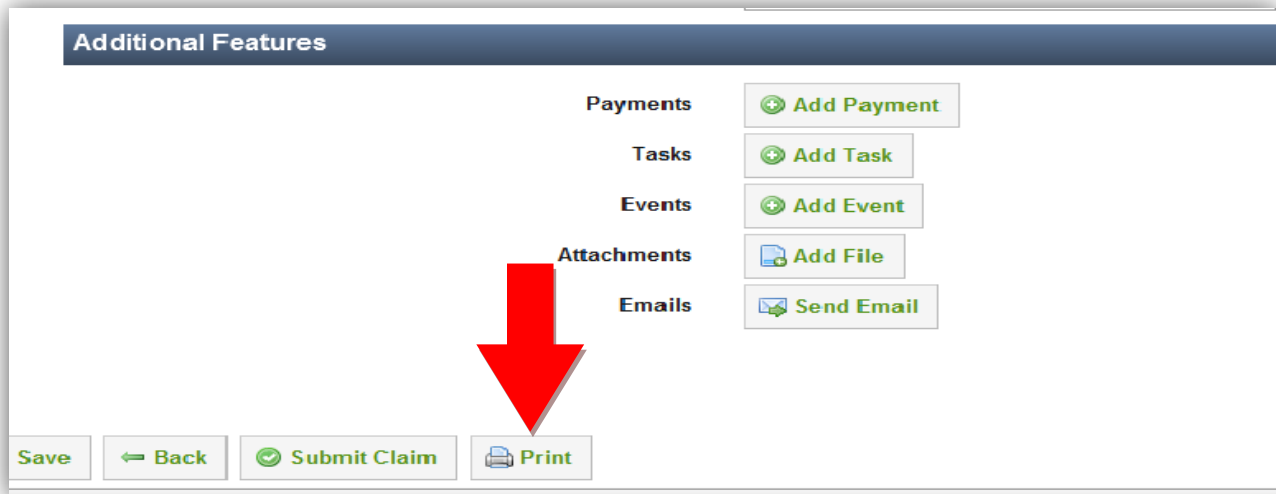
5.1 To attach supporting documents (Photos, etc.), click the **Add File** button.



5.2 To add payments, click the **Add Payment** button.

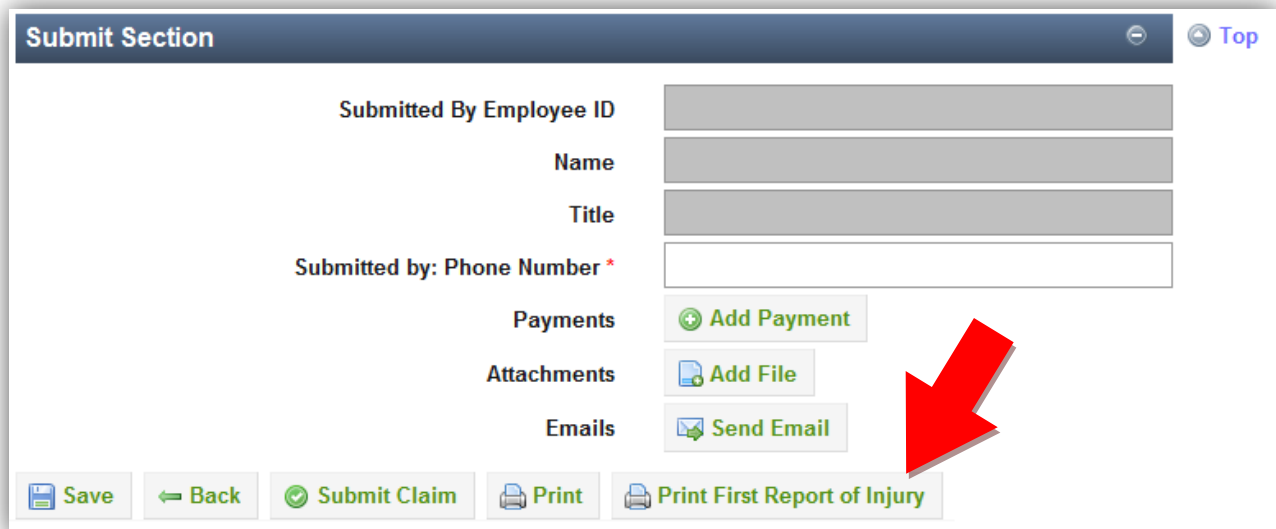


5.3 To view a generic print-out of the claim, click the **Print** button.



The screenshot shows a section titled "Additional Features" with a dark blue header. Below the header, there are five categories: Payments, Tasks, Events, Attachments, and Emails. Each category has a corresponding "Add" button: "Add Payment", "Add Task", "Add Event", "Add File", and "Send Email". At the bottom of the section, there are four buttons: "Save", "Back", "Submit Claim", and "Print". A large red arrow points to the "Print" button.

5.1 To view the state-specific First Report of Injury, click the **Print First Report of Injury** button.



The screenshot shows a section titled "Submit Section" with a dark blue header. Below the header, there are several input fields: "Submitted By Employee ID", "Name", "Title", and "Submitted by: Phone Number \*". To the right of these fields are three buttons: "Add Payment", "Add File", and "Send Email". At the bottom of the section, there are five buttons: "Save", "Back", "Submit Claim", "Print", and "Print First Report of Injury". A large red arrow points to the "Print First Report of Injury" 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.

