Hazard Based Risk Assessment Module

User Guide - V12

April 22, 2024

PARKLANE SYSTEMS

Table of Contents

Options

Hazard Based

There are six sections within the hazard-based risk assessment module that require completion in order for the module to effectively function. These sections are:

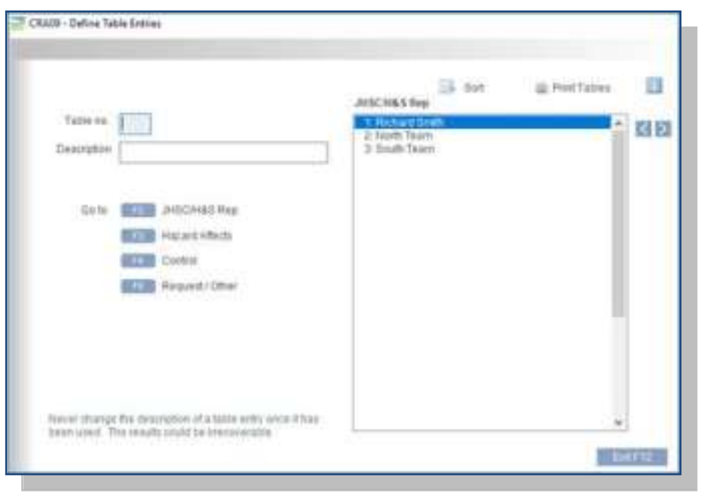
- Table definitions:
    a) JHSC/H&S Rep
    b) Hazard Affects
    c) Control
    d) Request/Other
- Risk Priority Table
- Location Table
- Hazard Type Table
- Link Location to Administrator (Optional)
- Email Message Template

The above sections are explained below and can be accessed by selecting the following Risk Assessment menu items: **Options > Hazard Based**

Table Definitions

JHSC / H&S

This table provides you with an area to record your Health and Safety representative(s), or teams, who were involved in the assessment. To populate this table:



1. Enter "1" in the **No.** field
2. Tab to the **Description** field
3. Enter name/team
4. Press tab - this will take you back to the **No.** field
5. Enter "2" and continue with the above steps until all desired persons are in the table

This table allows you to replace names as they change without affecting prior records.

Hazard Affects

Navigate to this table by selecting the **Hazard Affects** button. This section is to record who the hazard affects, i.e. staff, visitors, staff and visitors, etc. Populate this table as above.

Control

Navigate to this table by choosing **Control** button. This section is meant for your controls and recommendations. Like the hazard table, It is recommended that these are kept as general as possible. Standard controls in hierarchal order are:

- Elimination
- Substitution
- Engineering
- Administration
- Personal Protective Equipment

The above controls are recommended for this table as a free-text field is available on the assessment to detail the controls you are recommending.

Note: due to its hierarchal order, this is the only table that does not appear alphabetized on screen.

Request/Other

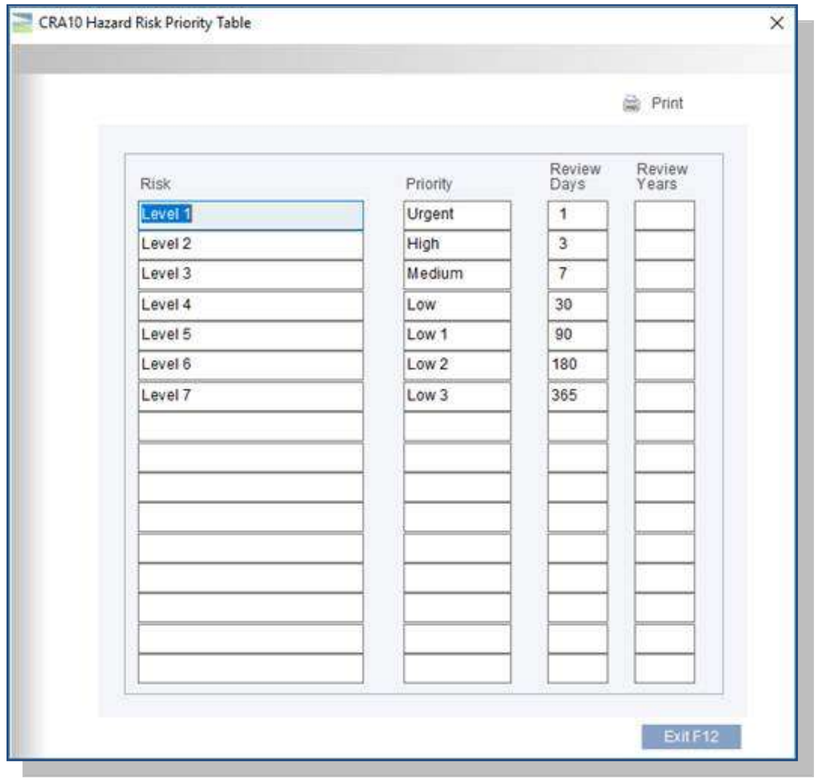
Parklane provides tracking of three different hard coded types of hazard based risk assessments. They are:

- Workplace Inspections
- Incident Related (i.e. post incident investigations)
- Government Inspection

The **Request/Other** table, however, gives you the freedom to track any additional types of assessments that may be relevant in your business, i.e. New Construction Safety Assessment, Manager requested assessment, etc. Using the same method as the previous tables, populate what kind of additional assessments you wish to categorize and track.

Risk Priority Table

This table is used to populate your risk matrix details, i.e. numbers/letters, corresponding priority and how many days/years given to address the hazard. This table will allow the system to automate the due dates and follow up dates on the assessment. This also permits you to pull reports by Risk and Priority.



- Click into the **Risk** field and enter desired risk letter/number
- Press tab and enter corresponding **Priority**
- Press tab and enter number of days, or years, allotted for successful control of the risk.
- Click **Exit** when completed

Location table

The Location table enables you to narrow down and report on the location of the risk to employees in your organization. There are three reportable fields and one free text field. Therefore, you can identify and report on three different location identifiers. i.e. ***Location 1***: Building A, ***Location 2***: Second floor, ***Location 3***: Room 209.

The example above allows you to pull a location report on Building A, floor, or room number. **Location 3** will be ultimately used to identify the specific location of the hazard identified in the assessment.

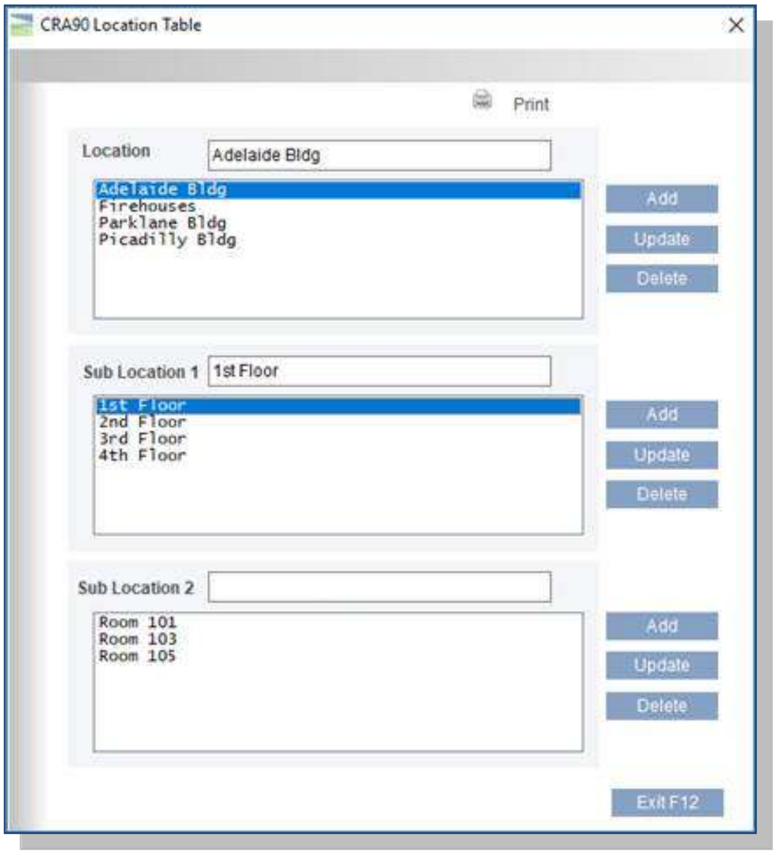
Note: The Location table described above is also available in the Task based section.

Adding:

Follow these steps to add to your location table:

1. Place cursor in first **Location** field and type description, i.e. *Building A*
2. Click **Add** or press **Enter** – this adds what was typed to the location table
3. Continue adding **Location** descriptions

4. When completed, highlight one of the locations you added in the first column and in the **Sublocation 1** field, type a location which falls within the highlighted 1st location, i.e. *Second floor*
5. Continue adding location descriptions which correspond with highlighted location in first location.
6. When completed, highlight one of your locations you added in Sublocation 2 and in the **Sublocation 2**, type a location which falls within the highlighted location, i.e. *Room 209*
7. Continue to add to this table as necessary.



Deleting/Updating:

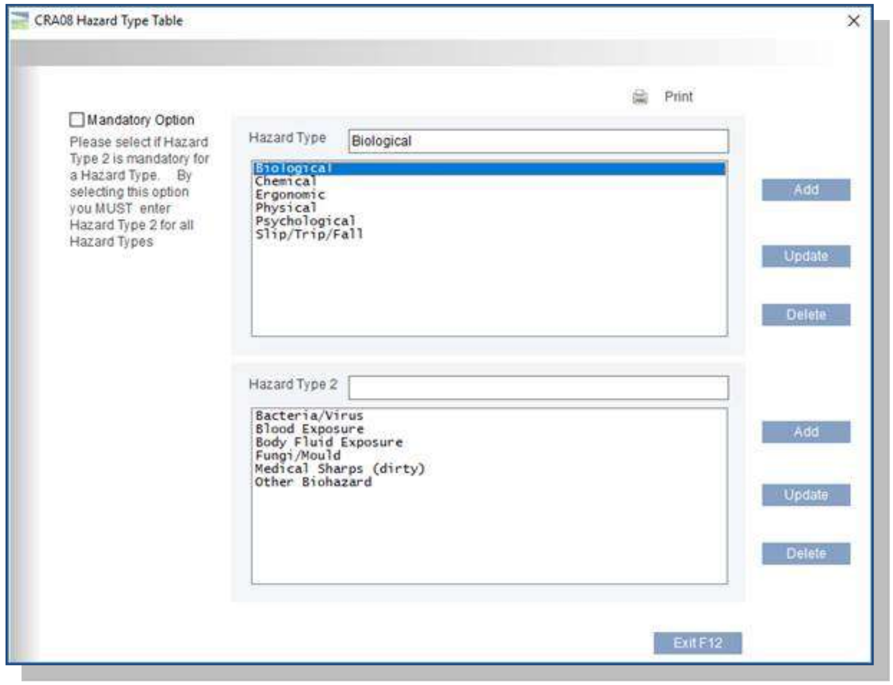
Should you need to delete a location, simply highlight the location and click **Delete**. Should you need to change the name of the location (i.e. spelling mistake), highlight the location and in the description field above type over or amend the description. Once finished, click **Update**.

Note: Any changes to locations will affect previously entered assessments.

Hazard Type Table

This table is where you may record the types of hazards found in your organization. It is recommended the hazards be as general as possible as the detailed specifics of the hazard can be recorded on the assessment itself in a free-text field.

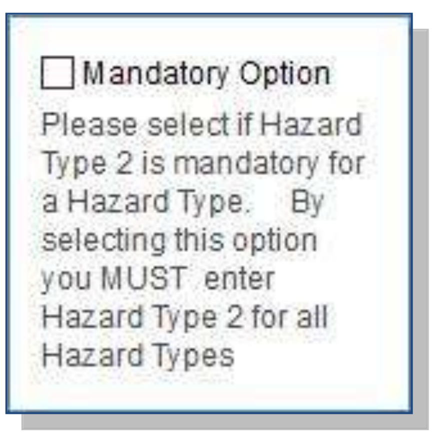
This table is two tiered, therefore allowing you to categorize your hazards. This table allows you to pull reports on these hazards in the future, therefore great care in determining the best approach for your organization prior to populating is recommended.



- Place cursor in **Hazard Type** field
- Type in hazard category and press **Enter** or click **Add**
- Highlight the category and place cursor in **Hazard Type 2** field
- Type in hazard and press **Enter** or click **Add**

Mandatory Type 2

You can make the selection of the Hazard Type 2 mandatory for all users by checking the **Mandatory Option** box.



Hiding Hazards and Locations

You can hide items in both the Location and Hazard Type Table. This functionality is useful, for example, if a location is no longer being used and you wish to hide this selection from the drop down when *adding an assessment*.

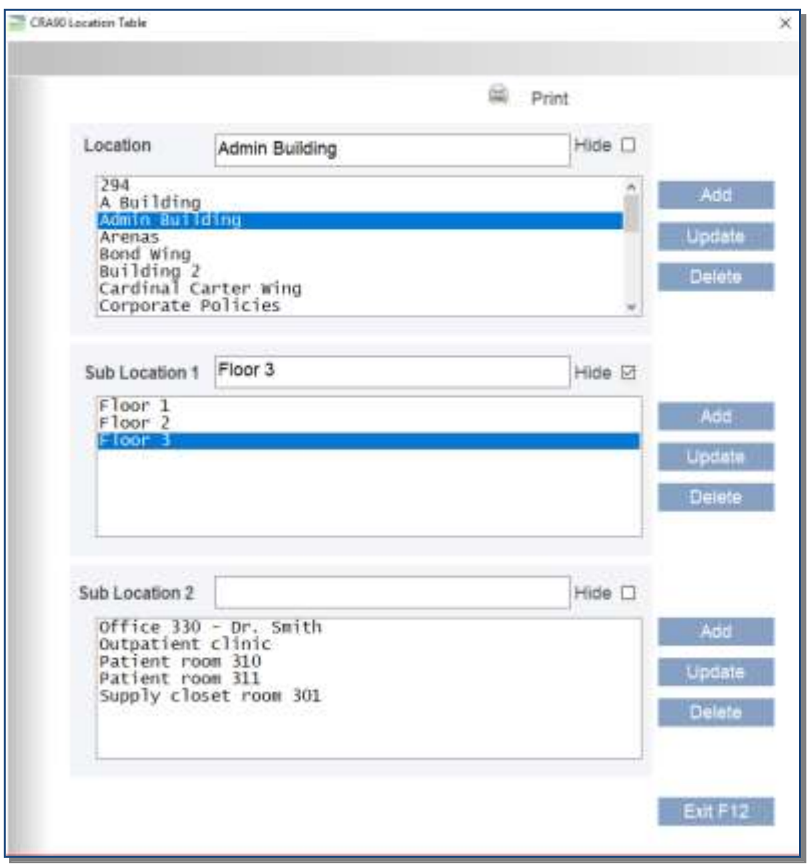
To hide a location:

1. Click on the Location, or Sublocation, you wish to hide
2. Check the **Hide** checkbox on the right
3. In the example image below, Floor 3 will no longer appear in the Sublocation 1 drop down when adding an assessment going forward. In addition, all Sublocation 2 will no longer appear in the drop downs either.

However, these hidden selections will still appear when pulling reports where a location can be chosen, so that you can still access the historical data. They will also appear in the Review/Follow Up section if looking for a control related to that location.

To hide a hazard:

1. This functionality operates in the same manner as hiding a location above.



Hazard Based Risk – Escalation

Risk Assessment has the ability to send automated reminder emails sent out regarding coming due or overdue controls. Every Monday, an email will be issued to the persons responsible fitting either of the following criteria:

- A control is coming due in the next 7 days
- A control is overdue

This email will notify the person responsible that they have a control coming due OR that they have an overdue control they have yet to respond to. The email will contain a PDF with the controls listed, as well as the hyperlink needed to respond.

You can turn this functionality on or off. There are no modifications available to the email or persons receiving.

To activate this option:

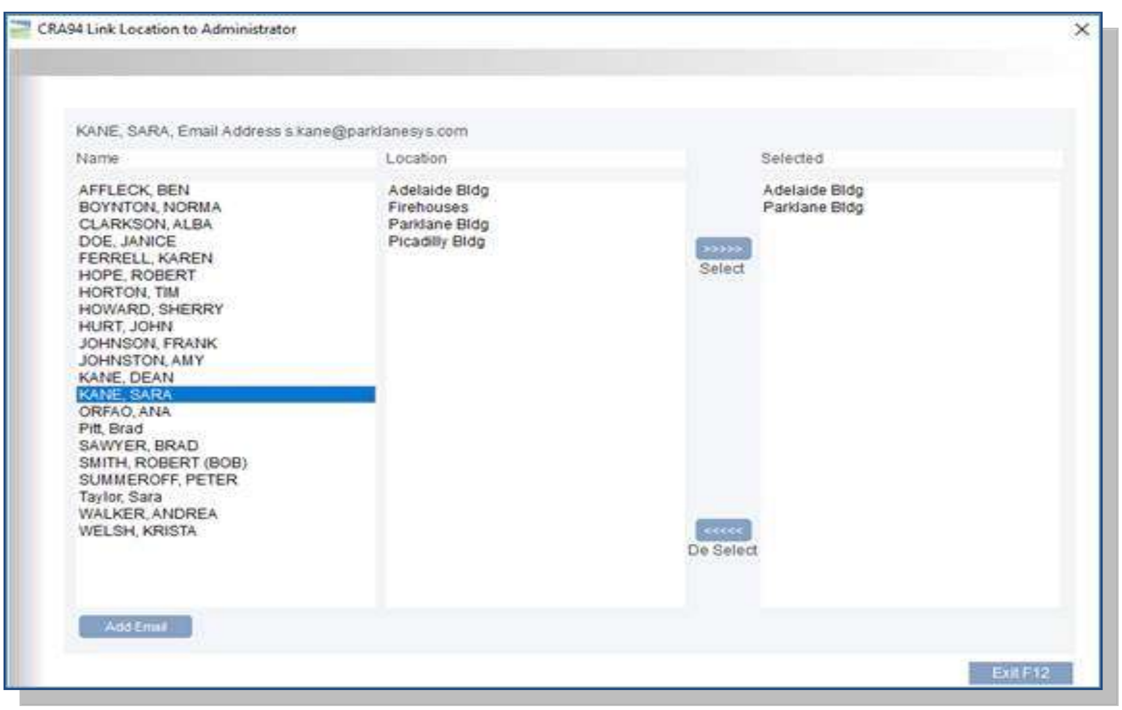
1. On your Parklane Login screen, type: /HAZESC in the password field and press enter.
2. Login as normal

To deactivate this option:

1. On your Parklane Login screen, type: /HAZESCOFF in the password field and press enter.
2. Login as normal

Link Location to Administrator

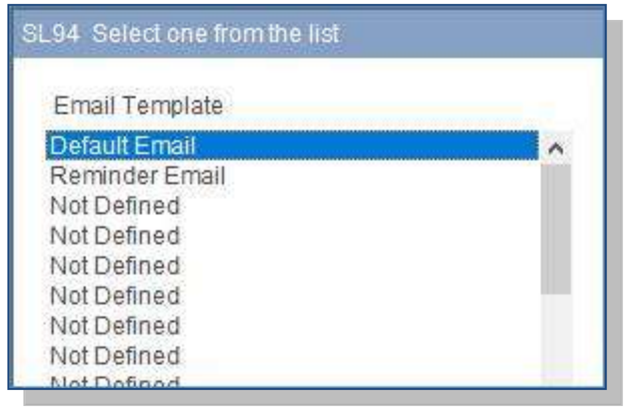
If a Parklane User wishes to be notified when the escalation emails are sent out and to whom they are sent, you can assign *who* gets notified based on Location. In other words, if there are two administrators, each responsible for the follow up of certain locations, you can assign which administrator gets notified based on the location they are assigned.



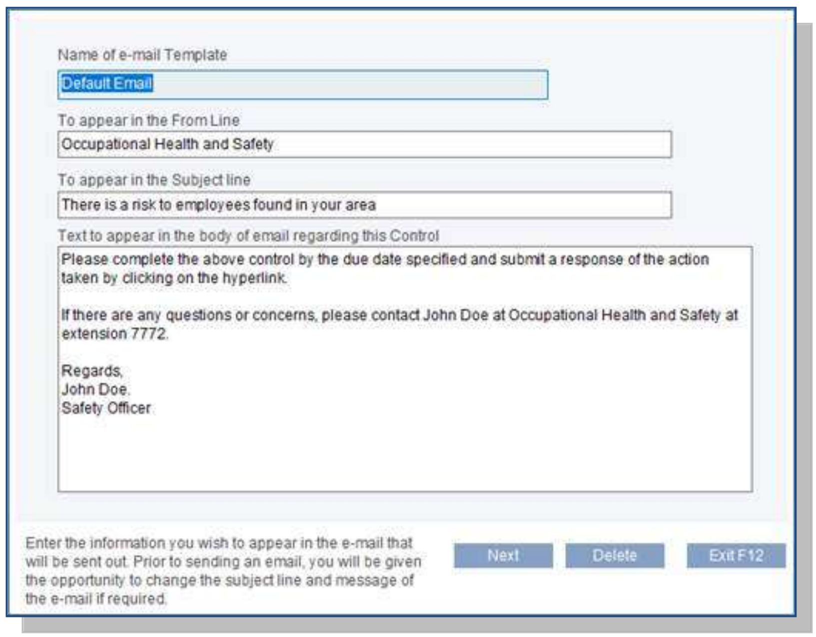
Email Template

The Email Template allows you to customize the header and footer of the email message sent from the system.

You may populate multiple email templates to use during an assessment which can be customized based on: i.e. who is sending the email, or the type of message you are sending, etc. The first template will be the default template



1. Select first template.
2. In the **Name of Email Template**, provide a name for the template.
3. In the **From line** – Enter desired text of where the email is from, i.e. H&S Department
4. **Subject line** – Enter subject of email, i.e. A risk was found in your area
5. **Footer section** – This section is for your complimentary close and contact information
6. To create another template, click **Next** and select the next undefined template.



Note: Parklane automatically completes the body of the email.

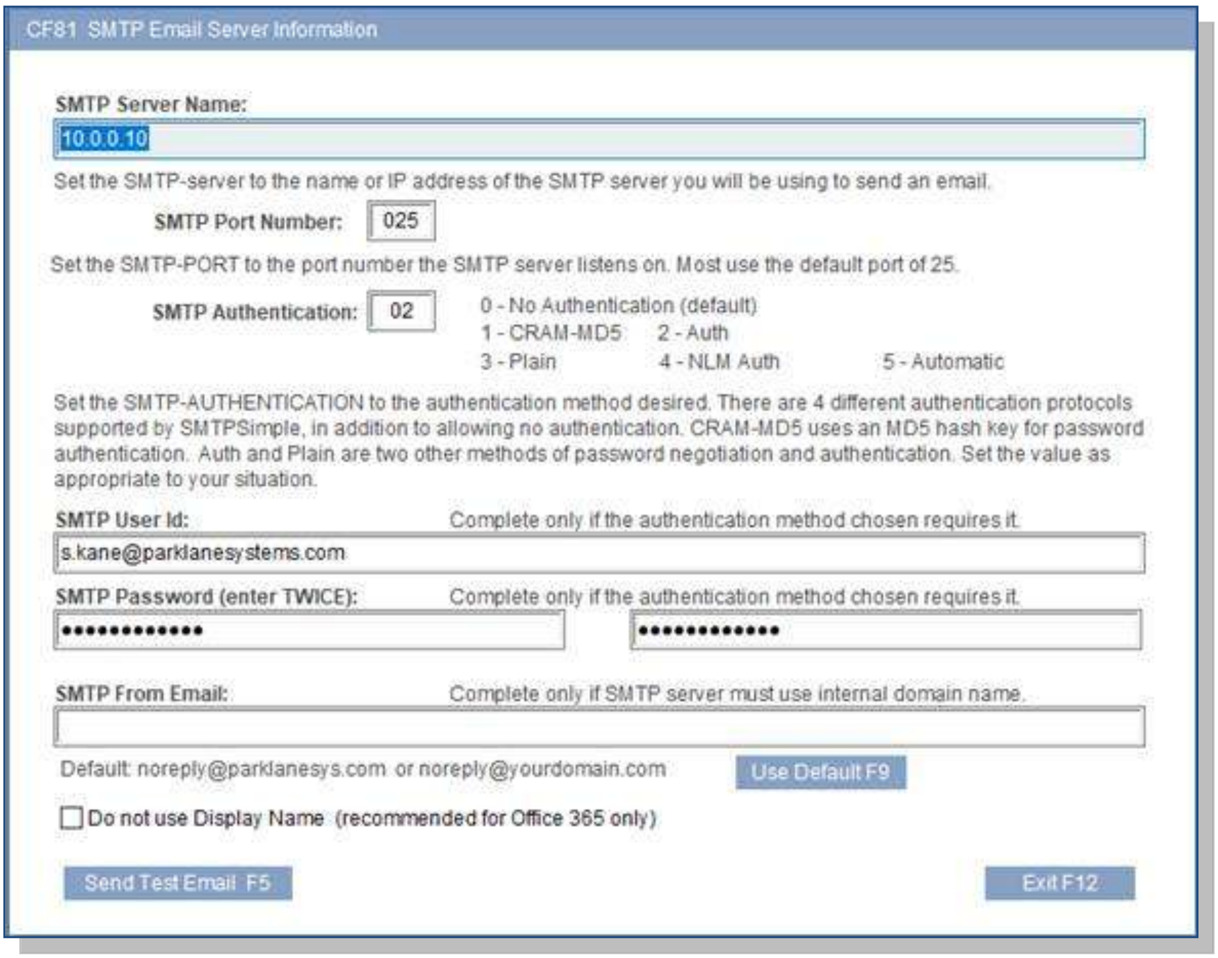
Editing the Email Template

The template may be changed at any time should there be a need for a change in content. i.e. phone number change, etc. Alternatively, you may edit the email “on the fly”. When sending the email from the system the email template will appear, it is at this point if you wish to add any further instructions, you may do so prior to sending. This will not affect the original template.

Email Technical Setup

The Email Technical Setup must be completed in order for emails to be sent from the Parklane system.

1. From the main menu, go to **Maintenance**
2. From the menu list choose **System Maintenance**
3. Click **Email Technical Setup**
4. Fill out the technical form and send test email. Assistance from your I.T. group may be necessary.



Online Form Setup

Two webforms are available with the Hazard Based Risk Module

1. **Online Risk Assessment**
   Conduct hazard-based risk assessments on location on a mobile device (i.e. tablet) or laptop. Internet connection is required.

2. **Risk Response Form**
   Webform to provide a response to emailed controls online. This is a non-configurable form.

Technical

As part of this module, Parklane provides the ability to be mobile in creating your Hazard-based Assessments. Also included is a webform that is used by others in response to your emailed controls. If the latter is enabled, the email sent will include a hyperlink for those responsible to simply click on, and will take them to a webform, where they may indicate the action taken to your controls. The response they provide will be populated automatically in the module for your review.

To access the setup from the main menu, follow these menu items:

GoTo > **Maintenance** > **System Maintenance** > **Web Server URL**

Enter the full address to your internal web server directory for the Parklane Webforms.

Example: **http://mycompany/intranet/parklane**

Online Risk Assessment

A section is provided for you to customize an introduction that will appear on the **Online Risk Assessment** webform for your users (i.e. inspectors). To access from the main menu:

Options > **Introduction Online Risk Assessment**

Fill in field provided.

Introduction Online Risk Assessment

Enter text to introduce users to the Risk Assessment web form and provide any instructions necessary to complete the form.

Passcodes and Email Recipients

Passcodes are used to provide users access to a Parklane Webform. This identifier allows for multiple users of the forms without providing direct access to the Parklane system itself (ie: JHSC users).

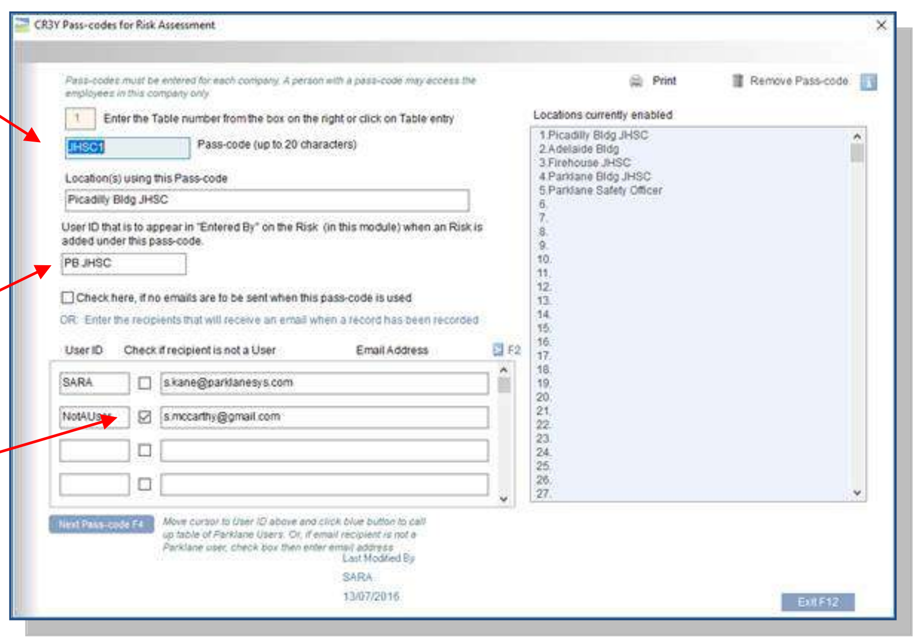
Using Passcodes will also differentiate between who and/or which location the submitted webform has originated from. In the Passcode set up section, you may also determine custom notification based on which passcode was used. To access from main menu:

Options > **Passcodes and Email Recipients**

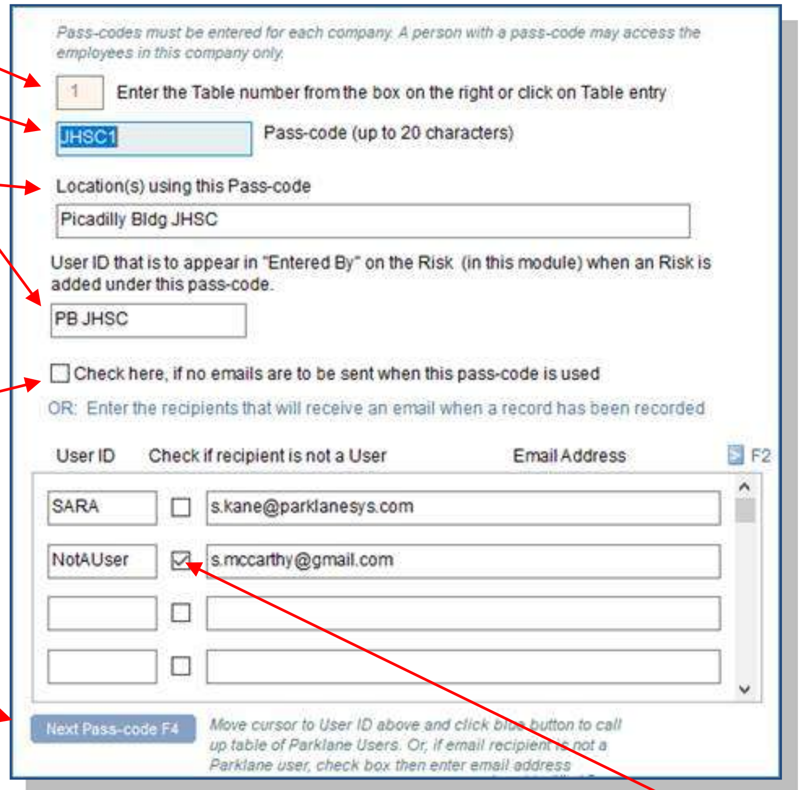
In the example below, there are five locations. In order for persons from Picadilly to access the webform, they must enter the passcode JHSC1. This will open the webform for them to begin their assessment.

Once they have submitted the webform, the assessment will be entered into the module. The assessment created will indicate that this assessment was created by PB JHSC.

This example also indicates that one Parklane user and one external person be given notification that an assessment was created in the system.



To complete this section:



1. Enter “1” in the first field.
2. Indicate the **Passcode** that will be used by person(s) at a given location.
3. Enter **Location** of the person(s) using the above passcode.
4. Indicate how you want the **UserID** of that person/location to appear when an assessment is submitted to the module.
5. If you do not wish for notifications to be sent each time an assessment is submitted, click the **Checkbox** and then **Next Passcode**. If you wish notifications to be sent, leave unchecked and continue to next step.
6. If one of the notification recipients of this passcode is a Parklane User, click **Get** and choose the user who will receive notification. Enter their email address in the field provided.
7. If one of the notification recipients of this passcode is not a Parklane User, indicate by clicking **Checkbox** and enter their email address in the field provided.
8. Click **Next Passcode** and repeat above steps

Action Emails

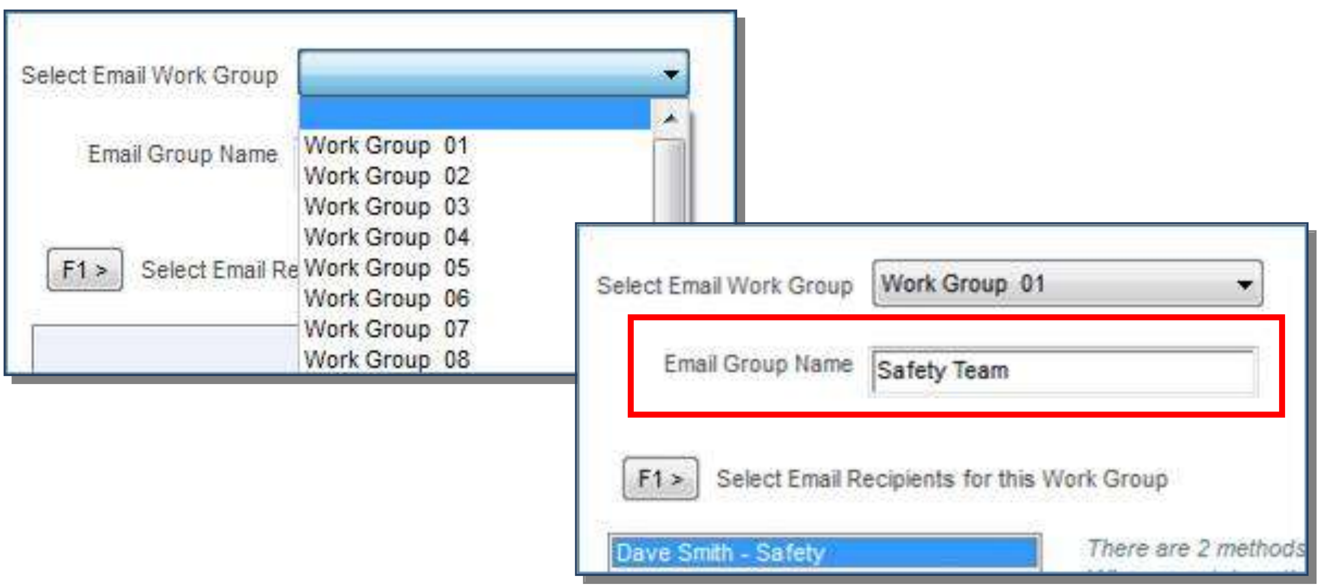
The **Action Emails** option allows the setup of email notifications to be sent to various personnel when a user performs one of the actions shown. Ensure that the email protocol has been set up under the Maintenance panel by clicking **Email Technical Setup**. This may require consultation with your I.T. Support Team. (See page 12)

Note: Before using this feature, all users and recipients must be setup in **Security**.

There are two options for sending Action Emails. An email will be sent to everyone that is in the email list for the specific **Action**, or an email will be sent to those who are in the same **Work Group** as the User.

Work Groups must be pre-defined when choosing the second option. Click on **Options/Action Emails/Email Recipients by Work Group**.

Click on the drop down for **Select Email Work Group** and click on a work group heading to rename.

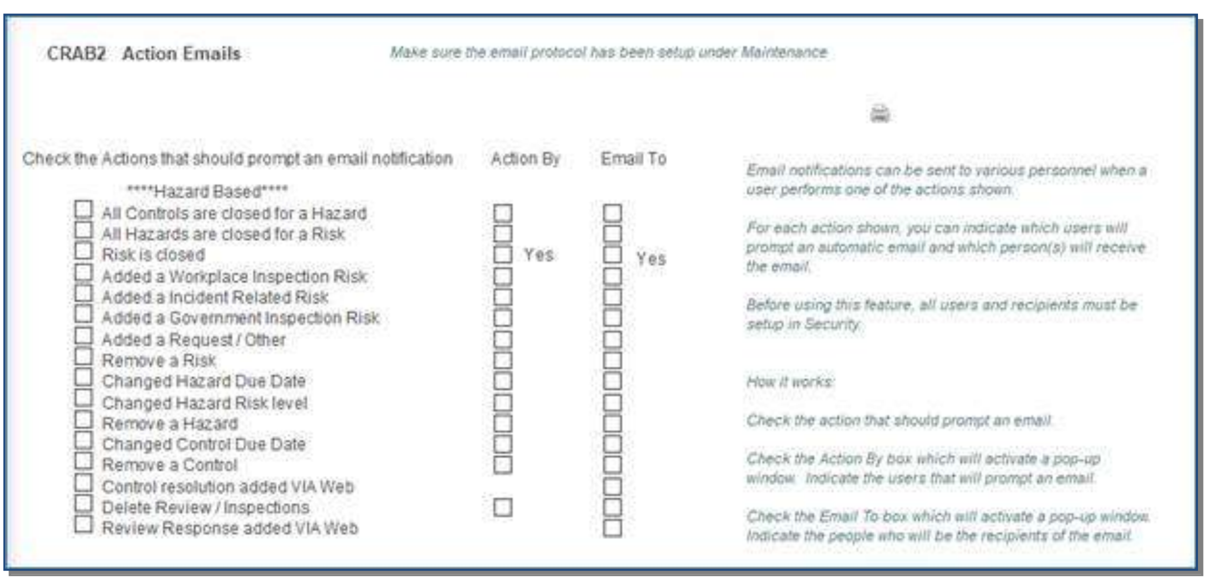


Click on **F1>** and begin to select the email recipients for this Work Group. Enter the next available line number and click **Get-F1** to select the email recipient from the list provided. Up to 200 email recipients may be selected per Work Group.

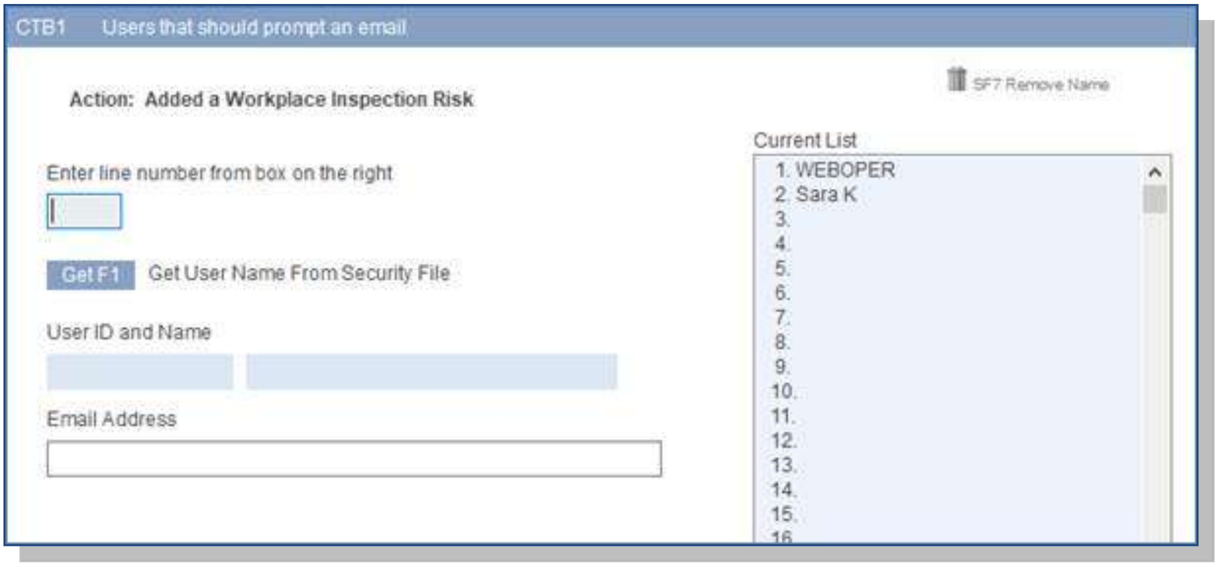
When an **Action** occurs, the system will determine what **Work Group(s)** the User is located in and will send an email to all other recipients within the Work Group(s).

To setup the **Action Emails** click on **Options/Action Emails/Action to Prompt Emails** and select the action(s) that should prompt an email notification.

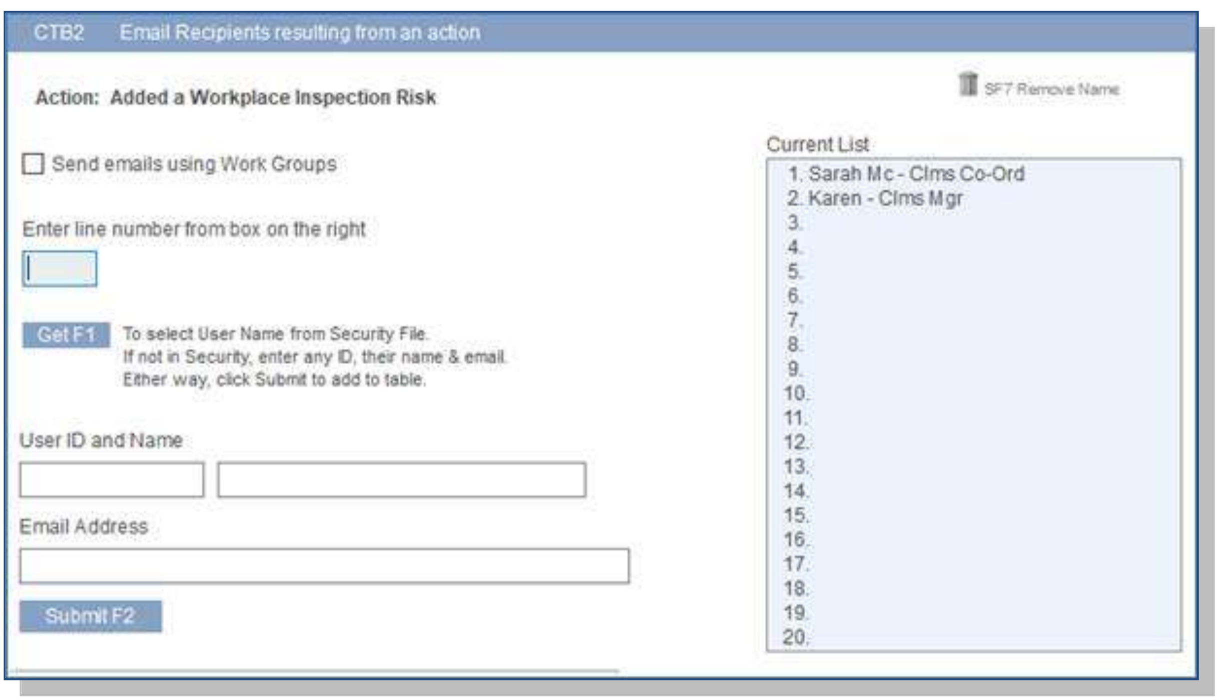
For each Action shown, you can indicate which users will prompt an automatic email and which person(s) or workgroups will receive the email. Check the Action that should prompt an email.



Click the **Action By** box which will activate a pop-up window. On this window indicate the users that will prompt an email to be sent. Up to 120 users can be identified.

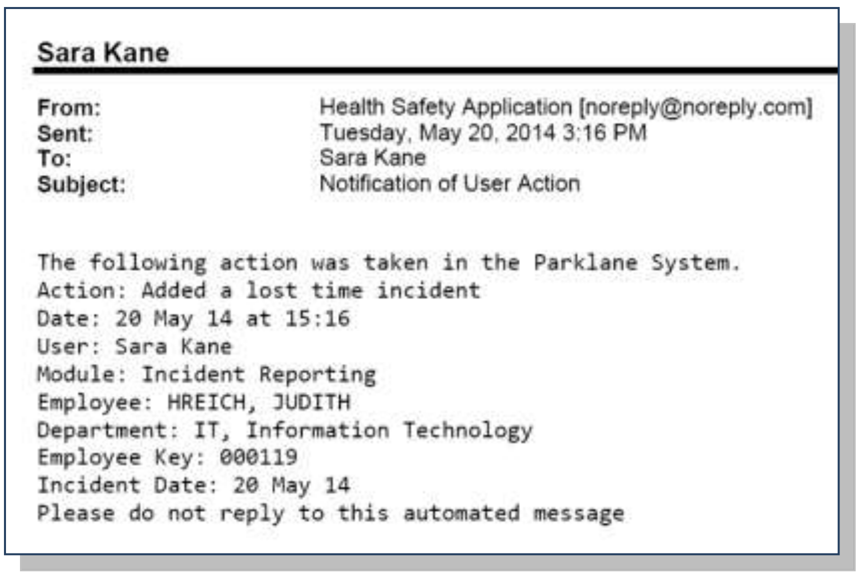


Next, click the **Email To** box which will activate another pop-up window. On this window indicate the people who will be the recipients of the email. Up to 20 recipients can be identified.



Alternatively, click on the check box to **Send emails using Work Groups**. Once checked, all other fields will be grayed out. As previously described, when an **Action** occurs, the system will determine what **Work Group(s)** the User is located in and will send an email to all other recipients within the Work Group(s).

Each time an Action is executed by a listed User, the Recipient will receive an email advising that the Action occurred.



Sara Kane

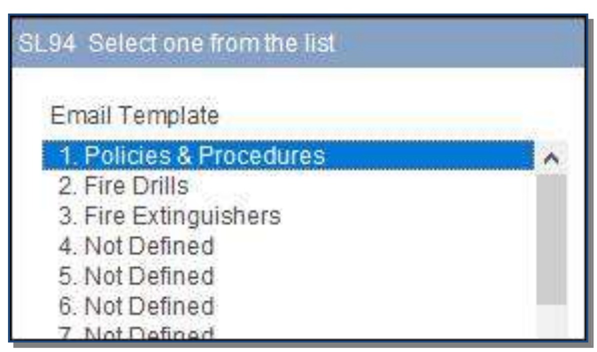
From: Health Safety Application [noreply@noreply.com]
Sent: Tuesday, May 20, 2014 3:16 PM
To: Sara Kane
Subject: Notification of User Action

```
The following action was taken in the Parklane System.
Action: Added a lost time incident
Date: 20 May 14 at 15:16
User: Sara Kane
Module: Incident Reporting
Employee: HREICH, JUDITH
Department: IT, Information Technology
Employee Key: 000119
Incident Date: 20 May 14
Please do not reply to this automated message
```

Review Email Template

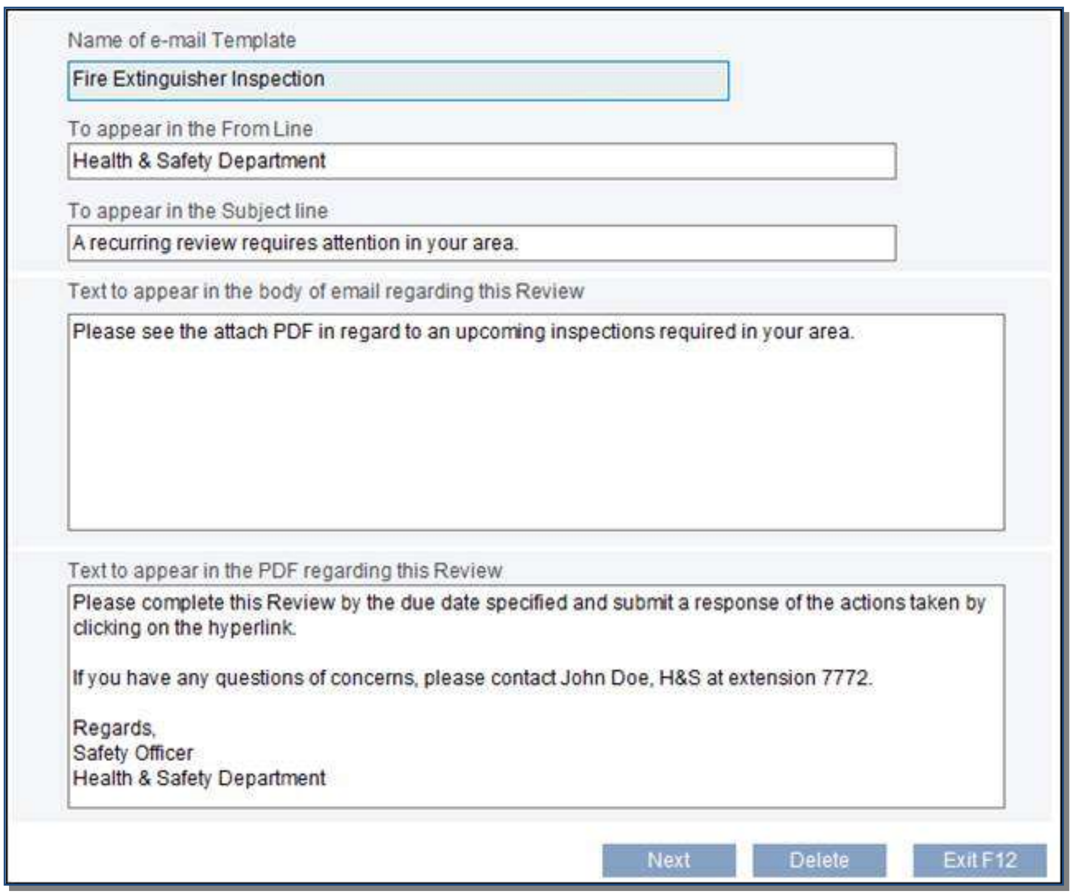
The Review Email Template allows you to customize the text of the Review email notification sent from the system.

You may create multiple email templates which can be customized for each category of Review.



1. Select first template
2. In the **Name of email Template**, provide a name for the template
3. In the **From Line** – Enter desired text of where the email is from, i.e. H&S Department or John Smith, Safety Specialist
4. **Subject line** – Enter subject of email, i.e. Your policy is due for review/revision
5. **Body of email** – Enter the text that will appear in the body of the email sent by the system.
6. **PDF** – Enter the text that will appear on the email PDF attachment regarding the Review. Eg. step by step instructions
7. To create another template, click **Next** and select the next undefined template.

The template may be edited at any time should there be a need for a change in content, i.e. extension number change.



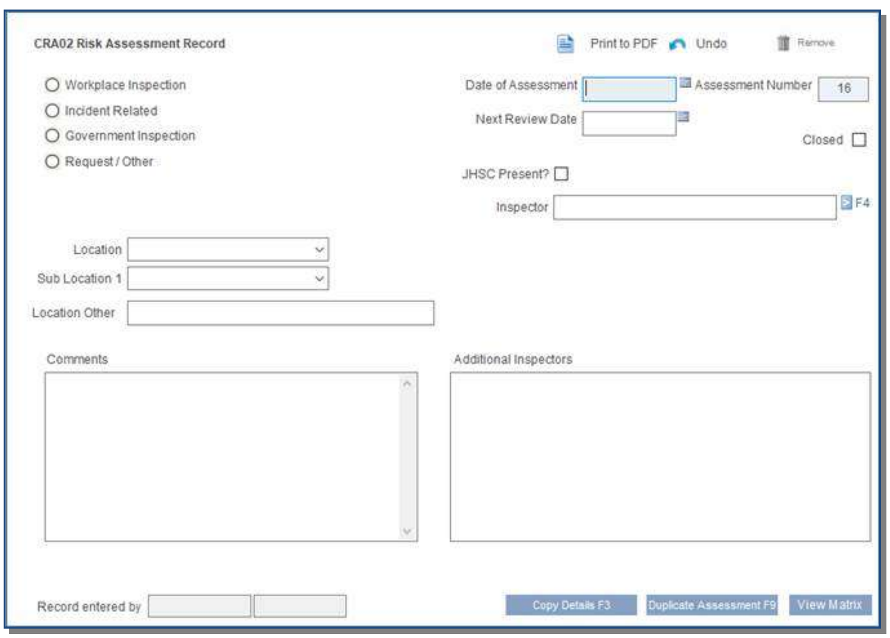
The Email Technical Setup must be completed in order for emails to be sent from the Parklane System. Please refer to **Email Technical Setup** in this guide for those instructions.

Using the Hazard Based Risk Assessment Module

Parklane's Hazard-Based Risk Assessment Module is designed to assist you in keeping track and on top of all your assessments and help to ensure the controls and recommendations have been addressed. Regular monitoring and appropriate use of this module may contribute substantially to the reduction of incidents in your workplace.

Add New Hazard Assessment

On the left hand side of the main menu are your selections in the Hazard Based Risk Assessment Module. These selections can also be found at the top on the menu bar. To begin creating a hazard based assessment:



1. From the panel on the left (or menu above) choose **Add New Hazard Assessment**
2. On the Risk Assessment Record panel, enter the date the assessment was conducted.
3. Using the **Location** drop downs, select the location where the assessment was conducted.
4. Select **Type of Assessment** from the radio buttons
5. Indicate whether a JHSC member/team or H&S Rep is present by clicking the check box and then selecting from drop down menu which will then appear.
6. Select the **Inspector** or who conducted the assessment.
7. Add any additional inspectors or comments

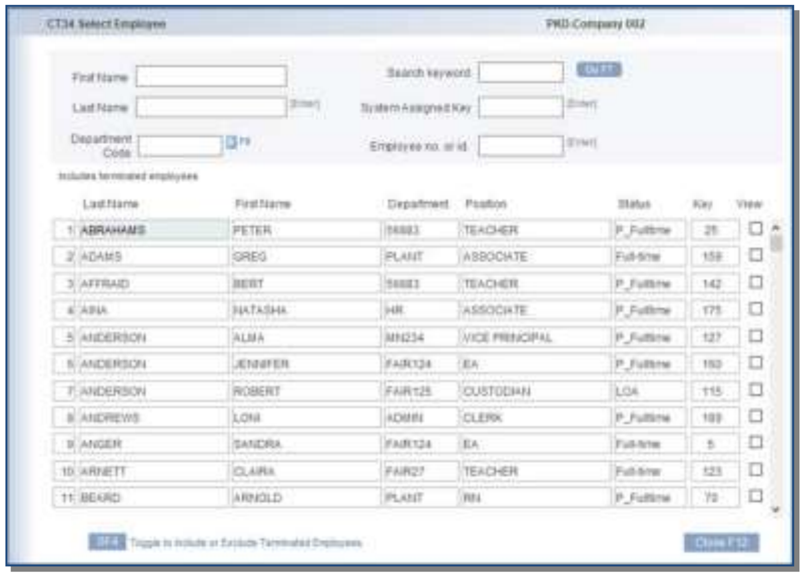
Assessment Types

Assessment types enable the user to narrow down the assessments they wish to view when opening the assessments, review/follow up of assessments, and pulling of reports.

Workplace Inspection

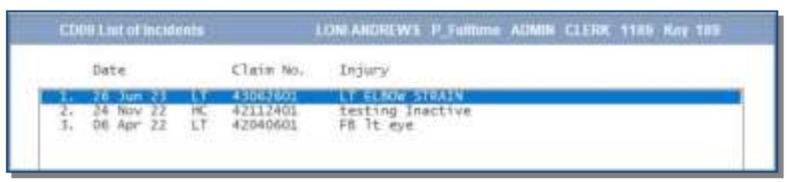
Indicates the assessment conducted was a general workplace inspection.

Incident Related



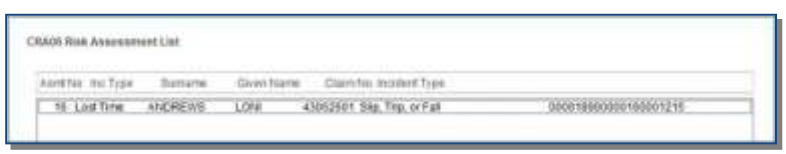
Choosing Incident Related assessment type indicates this assessment was initiated because of an incident(s) at the workplace. Should an incident investigation be necessary, select Incident Related radio button and two buttons appear: **Link-Employee/Incident** and **List-Employee/ Incident**. The Link Employee Incident button allows the user to link this assessment to a particular incident, or multiple incidents.

Linking incidents:



1. Click **Link-Employee/Incident F6**
2. Search and choose an employee by clicking on the name.
3. Click on incident related to the hazard assessment.
4. Incident is now linked. Should another need to be added, simply begin again at step 1.

List incidents:



1. Click **List-Employee/Incident F2**
2. A list of incidents linked to the assessment will pop up.
3. Double clicking on any of the listed incidents will open that incident.

The list of incidents includes the classification, incident type and name of person(s) involved in the incident. If a user does not have access to Incident Reporting, they will not be able to access the incident from Hazard Based Risk Assessment.

Note: The linking feature to incidents will not function without Parklane's Incident Reporting Module.

Government Inspection

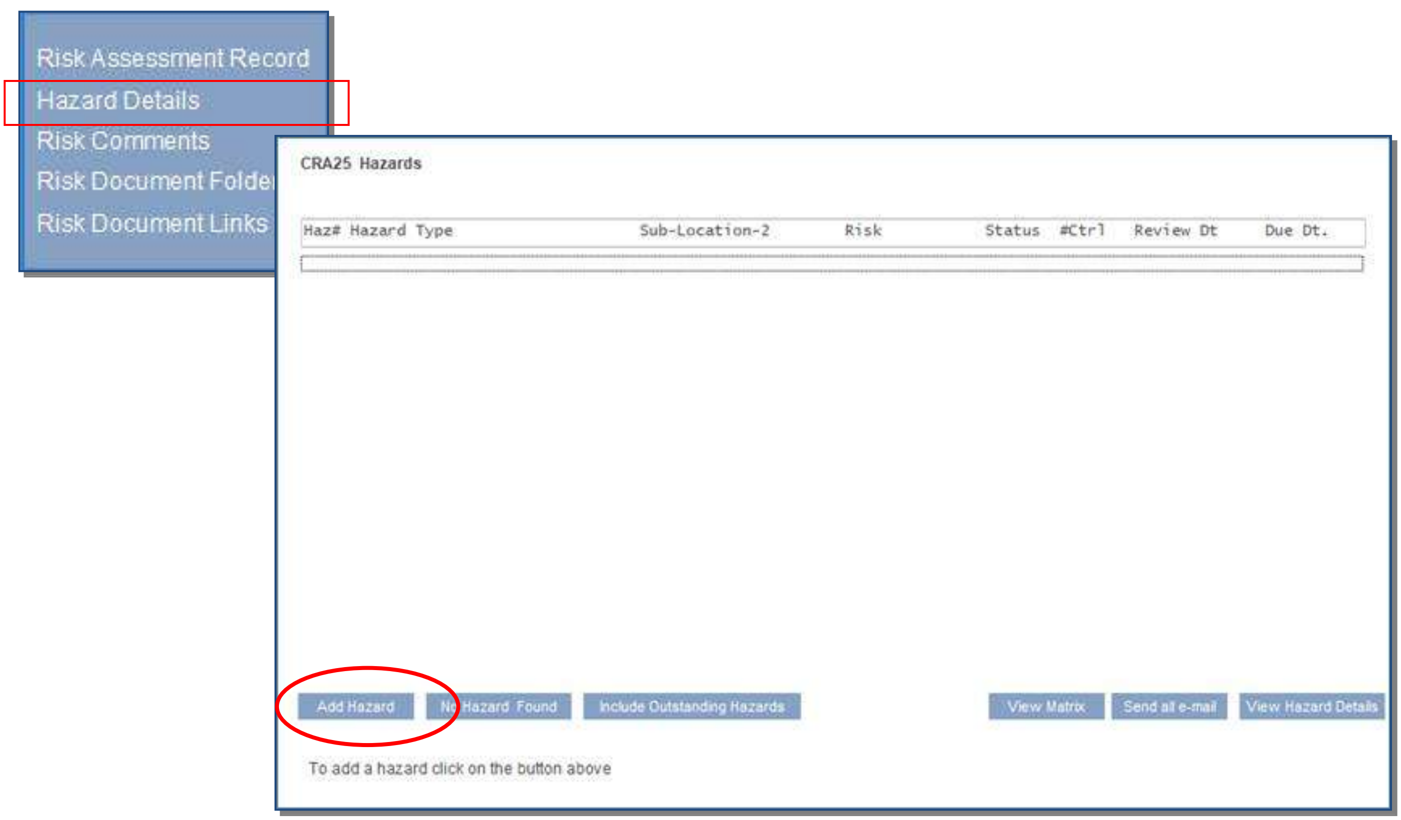
was conducted either by a government official or that one was present. A field will appear on the main page in which you can indicate the name of the government official. This category, for example, can be used to record audits and track any resulting orders.

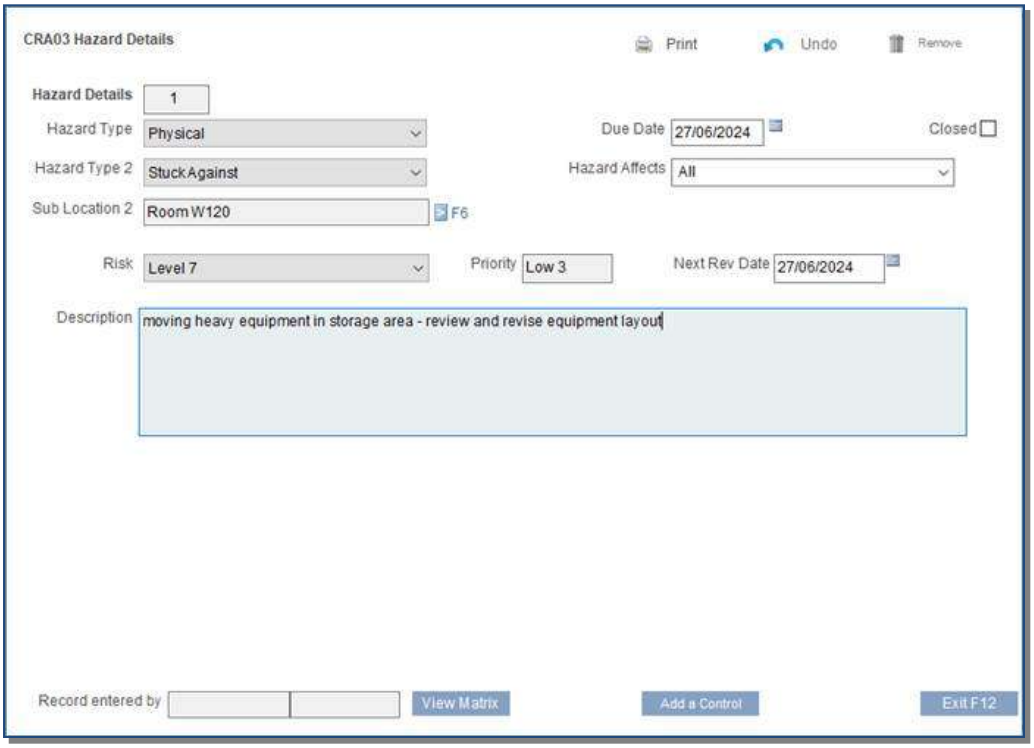
Request/Other

Choosing the Request/Other selection allows you to choose from a custom list of assessment types. When this radio button is selected, a drop down field will appear to select from.

Adding Hazards

Once the Risk Assessment Record panel is complete, the hazards identified during the assessment can be recorded using the following steps:





1. From the side bar click on **Hazard Details**.
2. Your hazard list window will appear. Choose **Add Hazard** on bottom left of the screen. The Hazard Detail panel will appear.
3. Choose **Hazard Type** and **Hazard Type 2** from drop downs.
4. Choose from **Sub-location 2** drop down, indicating where the hazard is specifically located.
5. Describe hazard in further detail in the **Description** section
6. Choose from the **Hazard Affects** drop down. (not mandatory)
7. Choose the appropriate **Risk** level you wish to assign this hazard (click View Matrix for custom guide).
8. After choosing risk, the **Priority** field and **Due date** field will populate automatically according to how your Risk Priority Table was set up.

Once the above steps are completed, the hazard details section is complete and controls, or recommendations, can be added. Alternatively, click **Close** and the hazard will be saved and another hazard can be added by simply repeating the steps above.

Reporting No Hazard Found

Risk Assessment will also allow you to indicate when no hazard was found. From the main Hazards panel.

1. Select **No Hazard Found**
2. Select from the drop down which location there were no hazards found
3. Any comments you wish to associate with this location can be entered in **Comments**

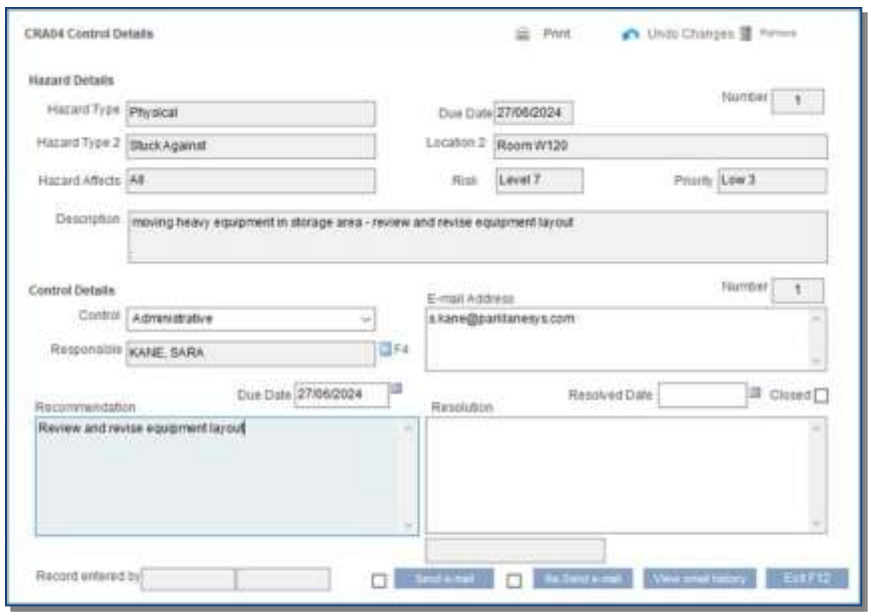
Including Outstanding Hazards

Should you wish to include any hazards still outstanding in Sub Location 1, simply select **Include Outstanding Hazards** from the main Hazards panel (Figure 23). Parklane will search the database for outstanding hazards (not closed) that match exactly the Location and Sub Location 1 indicated on the main details page.

***Note**:* Once the hazard is finally closed on the most current assessment, Parklane will simultaneously close all the original hazards found at that location.

Adding Controls

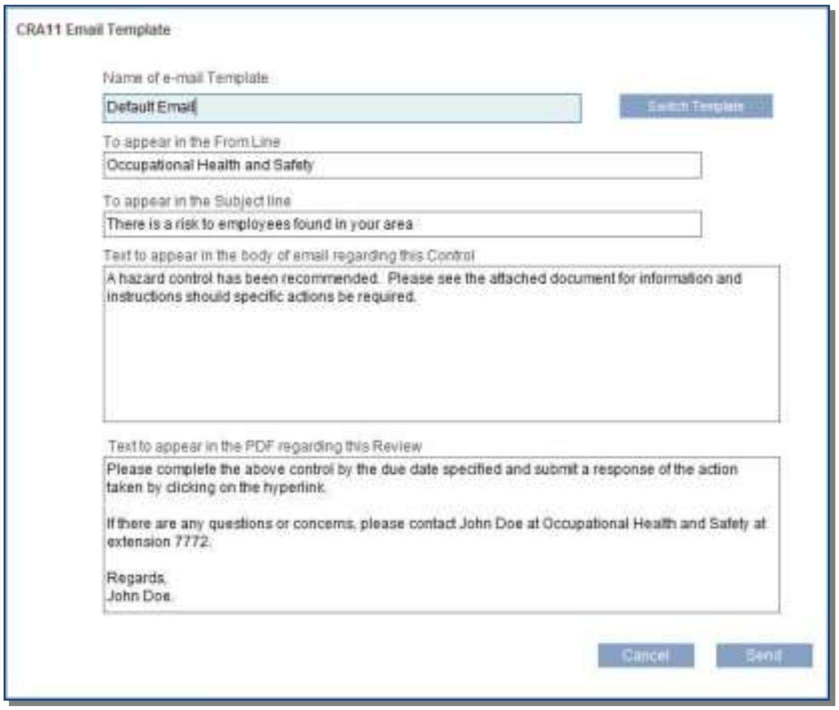
Once the details of your hazard are complete, you may add your controls.



1. Click **Add a Control** at bottom of Hazard Details panel.
2. The Control Details panel will appear.
3. Select type of control from **Control** drop down.
4. **Due date** auto-populated from your Hazard Details – *should you wish to extend date (based on complexity of control) you may alter this*.
5. In the **Recommendation** field, describe in detail the control to be implemented.
6. Search for a primary person you wish to assign responsibility, based on location, or control, etc., by clicking on the search field under **Responsible**.
7. Search and select name – should the email address be populated on the Personal Demographic record, it will then appear in **Email Address** field. If this is not the case, you may add manually in **Email Address** field or update the personal data record itself.
8. To add more than one email, press **enter** to add another.
9. Once complete, click **Send Email** to send control/recommendation and click **Close**. Alternatively select "Send all Emails" on Hazard Description Panel when complete.
10. Repeat above steps to add multiple controls for the hazard

Sending an Email

Email controls are at the bottom of the **Control Details** panel. A check mark to the left of the button will indicate whether an email has been sent or re-sent.



CRA11 Email Template

Name of e-mail Template
Default Email
Switch Template

To appear in the From Line
Occupational Health and Safety

To appear in the Subject line
There is a risk to employees found in your area

Text to appear in the body of email regarding this Control
A hazard control has been recommended. Please see the attached document for information and instructions should specific actions be required.

Text to appear in the PDF regarding this Review
Please complete the above control by the due date specified and submit a response of the action taken by clicking on the hyperlink.

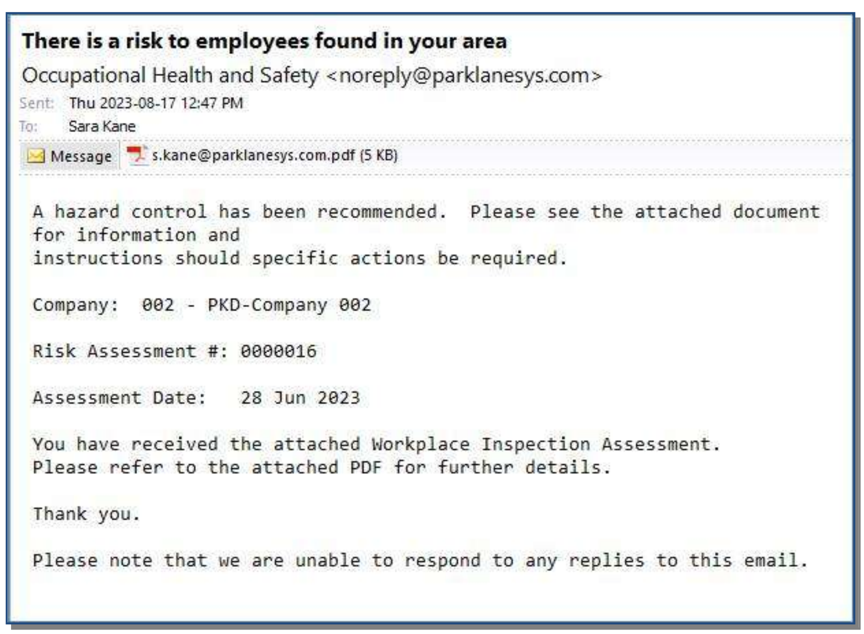
If there are any questions or concerns, please contact John Doe at Occupational Health and Safety at extension 7772.

Regards,
John Doe

Cancel Send

When the control is entered and the email address is entered, perform the following steps:

1. Click **Send Email**
2. Your email template will appear, giving you an opportunity to adjust content prior to sending. Alternatively, select **Switch Template** to use a different email template.
3. Click **Send**.



There is a risk to employees found in your area

Occupational Health and Safety <noreply@parklanesys.com>

Sent: Thu 2023-08-17 12:47 PM

To: Sara Kane

Message s.kane@parklanesys.com.pdf (5 KB)

A hazard control has been recommended. Please see the attached document for information and instructions should specific actions be required.

Company: 002 - PKD-Company 002

Risk Assessment #: 0000016

Assessment Date: 28 Jun 2023

You have received the attached Workplace Inspection Assessment. Please refer to the attached PDF for further details.

Thank you.

Please note that we are unable to respond to any replies to this email.

Parklane will collect the details of your control and hazard and creates a PDF document which is attached to the email. The following fields auto-populate PDF attachment:

- A response link
- Date of assessment
- Location
- Hazard type
- Hazard description
- Priority
- Who it affects
- Control
- Recommendation
- Due dates

Resend Email

The Re-Send button can be used:

- should there be no response to your original email regarding the control and you wish to resend. Again, your email template will appear and perhaps the subject line can be changed to indicate this is the second notice. Or, create an email template which reflects the email is a second notice.
- if additional details of the control have changed and you wish to send an amendment.

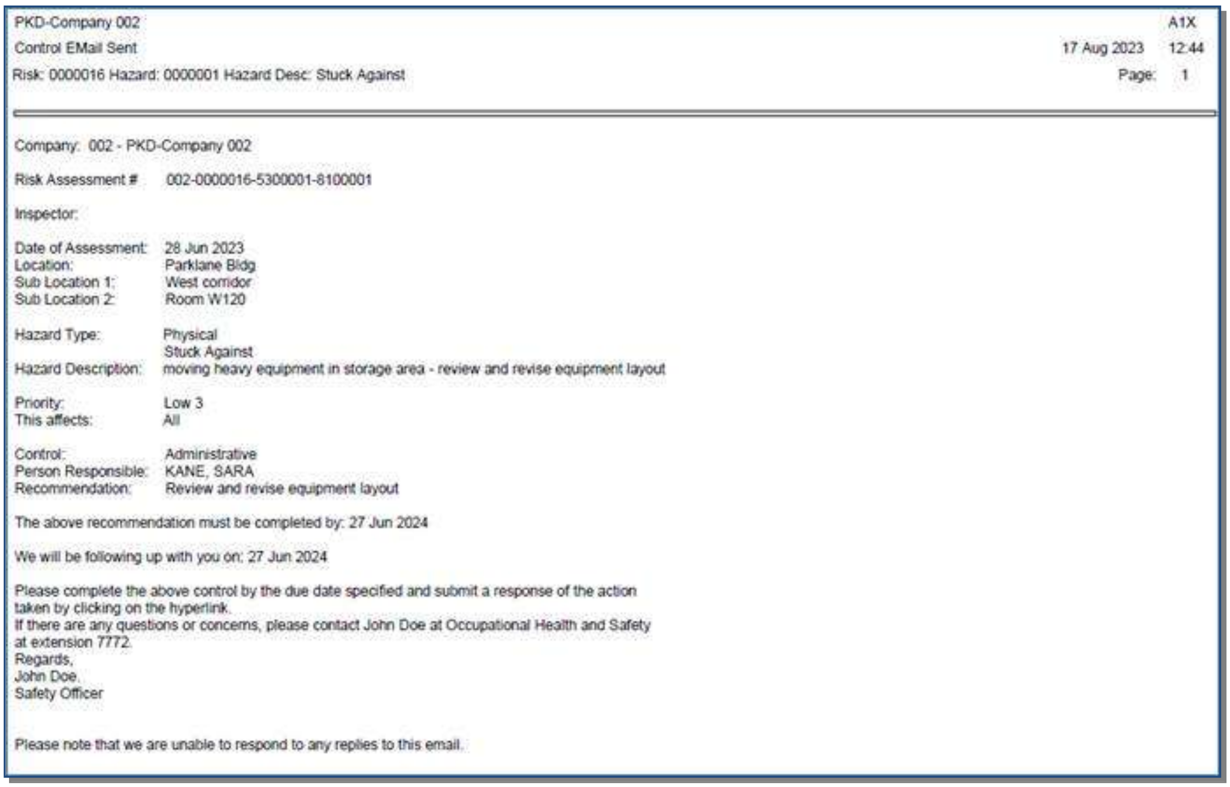
View Email History

Click the **View Email History** button to see a list of the emails sent regarding that particular control. This lists the date sent, the time, and the recipient. Double click on any of these to view the content which was sent. Should the control have been amended, for instance, it keeps a history of the change and the original sent.

Send All Emails

Should you wish to send all of your controls via email at once (they must all use same email template), you can do this on your hazard details panel. Simply click **Send all E-Mails** button and the system will create a PDF, attach it to an email and send to the person(s) responsible for those controls.

The PDF will contain all of the necessary informations, including hyperlinks to respond to each control.



PKD-Company 002 A1X
Control EMail Sent 17 Aug 2023 12:44
Risk: 0000016 Hazard: 0000001 Hazard Desc: Stuck Against Page: 1

Company: 002 - PKD-Company 002

Risk Assessment # 002-0000016-5300001-8100001

Inspector:

Date of Assessment: 28 Jun 2023
Location: Parklane Bldg
Sub Location 1: West corridor
Sub Location 2: Room W120

Hazard Type: Physical
Stuck Against
Hazard Description: moving heavy equipment in storage area - review and revise equipment layout

Priority: Low 3
This affects: All

Control: Administrative
Person Responsible: KANE, SARA
Recommendation: Review and revise equipment layout

The above recommendation must be completed by: 27 Jun 2024

We will be following up with you on: 27 Jun 2024

Please complete the above control by the due date specified and submit a response of the action taken by clicking on the hyperlink.
If there are any questions or concerns, please contact John Doe at Occupational Health and Safety at extension 7772.
Regards,
John Doe,
Safety Officer

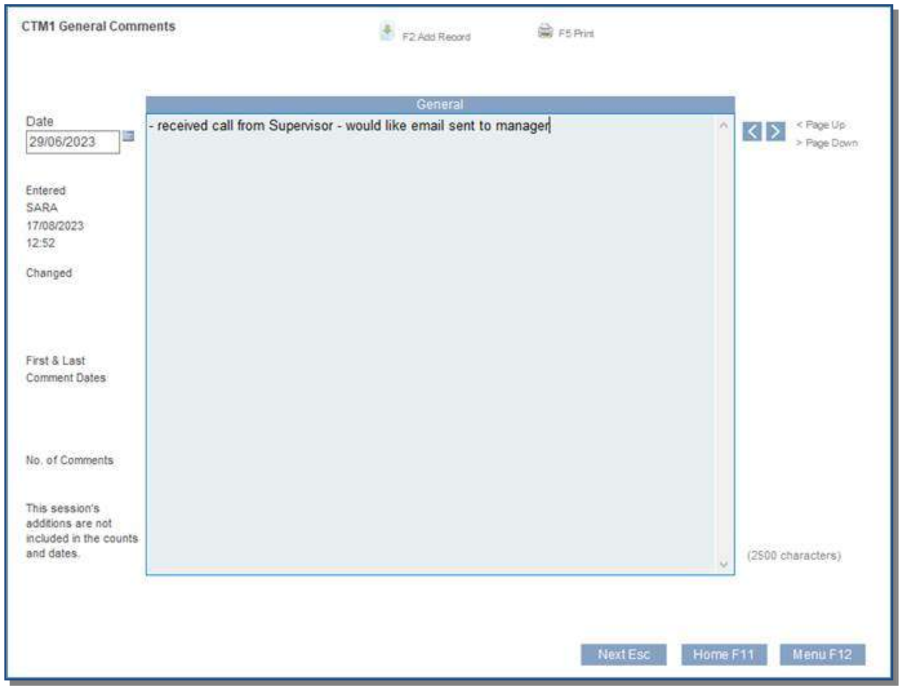
Please note that we are unable to respond to any replies to this email.

Hazard Comments

Like other Parklane modules, the Hazard Based Risk Assessment module gives the user opportunity to add comments to risk assessments.

1. While in an assessment, on left side bar click **Hazard Comments**.
2. Date auto-populates, however, can be changed.
3. Enter comments.
4. Exit by choosing another tab on left sidebar.

Comments will automatically populate the user, the date and time the comments were entered. This appears once the user exits and returns to comments.

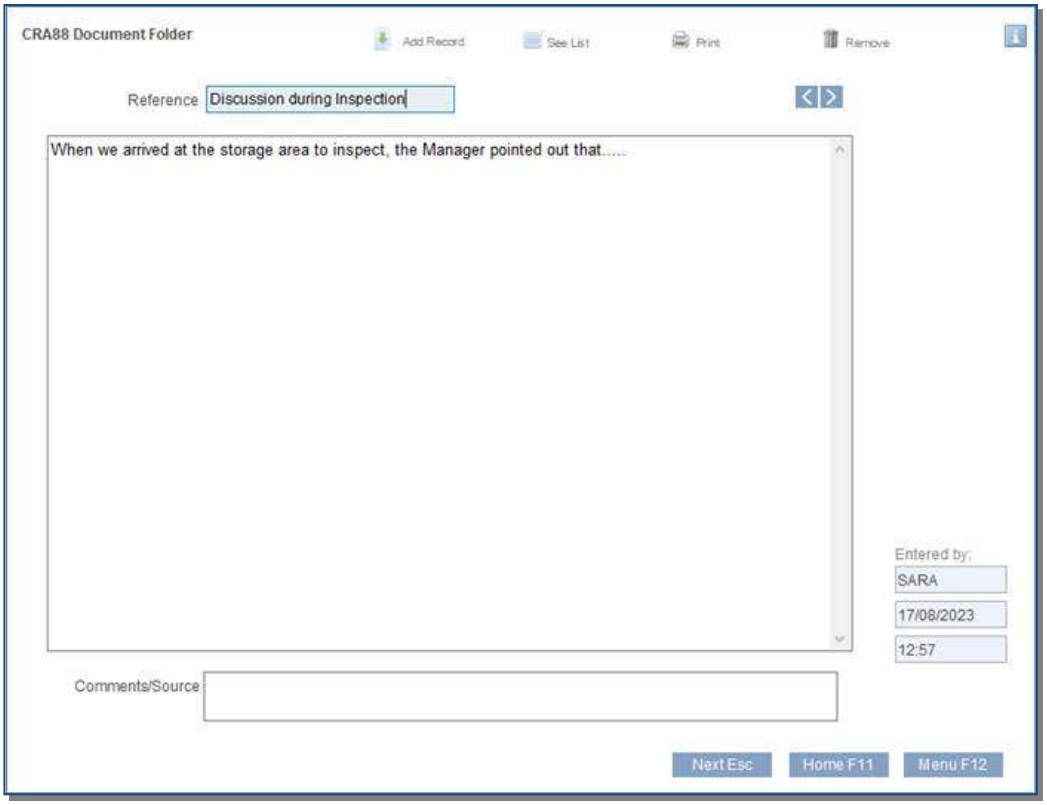


Hazard Document Folder

Document folder allows the user to keep a record of any text documents related to the assessment record.

Adding a Document Folder:

1. While in an assessment record, click **Hazard Document Folder** tab on the left sidebar.
2. Document Folder screen will appear. Type name of document in **Reference** field.
3. In field below, type or paste text to save up to 8000 characters .
4. Exit by choosing another tab from the left sidebar.



The user, date and time are populated automatically once exiting Document Folder.

Viewing a Document Folder Entry

1. In Document Folder click **See List** from the menu bar at the top of Hazard Document Folder window.
2. A window will appear with a list of the Document Folder entries to view.
3. Double click on the one you wish to view.

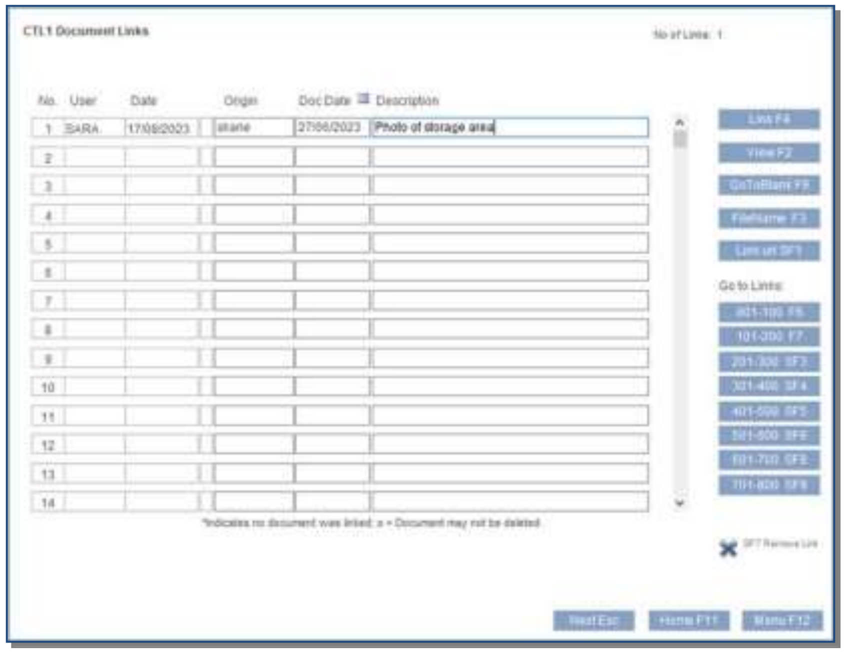
Deleting a Document Folder Entry

1. Open a Document Folder entry (see above).
2. Click the **Remove** button on top right of entry.
3. A note will appear asking to Delete this record. Should you click **Yes**, the folder and any record of it will delete.

Hazard Document Links

Document Links allow the user to attach any electronic document to the assessment, i.e. jpegs, emails, spreadsheets, etc.

Adding a link:



1. While in an assessment, on the left sidebar click tab called **Hazard Document Links**
2. The cursor will appear under **Origin**. Type name or organization of origin of document
3. Enter the date of the document
4. Under **Description**, enter description of document you are adding, i.e. Photo of area
5. On the right is a side bar with links. Click **Link F4**
6. A browser window will pop up. Location file, select file, then click **Open**
7. When document is linked, user will receive message that **Document was linked successfully**
8. Exit by choosing another tab on the left sidebar

Document links will automatically populate the user and the date the links were made.

Viewing a link

1. In Document Links place cursor on description of link you wish to view.
2. Click **View F2** from right sidebar.
3. Document will open.
4. Simply close document when finished viewing.

Deleting a link:

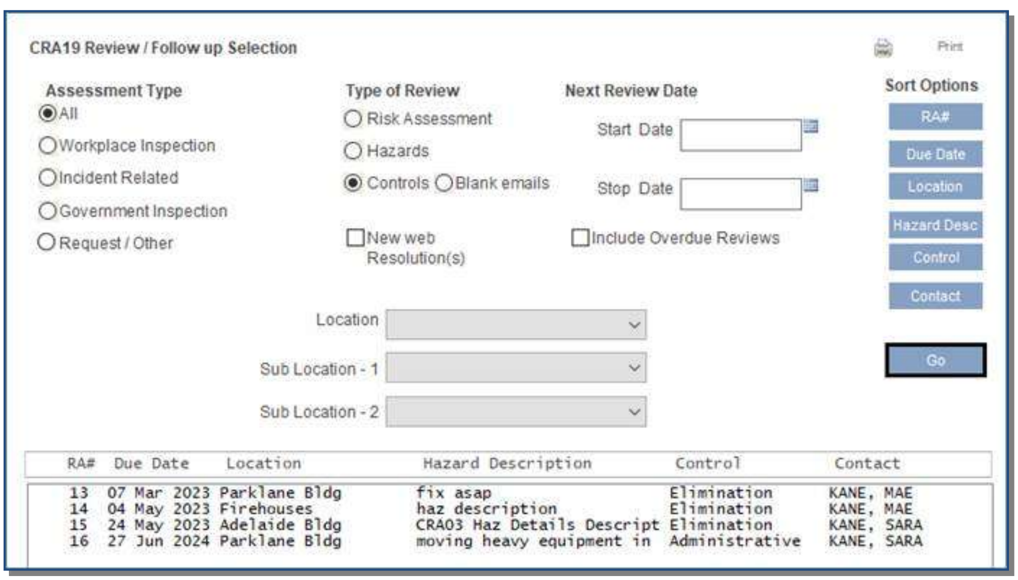
1. In Document Links place cursor on description of link you wish to delete.
2. Click **X SF7 Remove Link** at bottom right of panel.
3. A note will appear asking if you are sure. Should you click **Yes**, the document and record of it will delete.

Review and Follow up Hazard

This unique section assists you in keeping track and on top of any outstanding controls/recommendations. Only those assessments, hazards and controls that are NOT closed (still outstanding) will appear here.

Review/Follow Up Selection

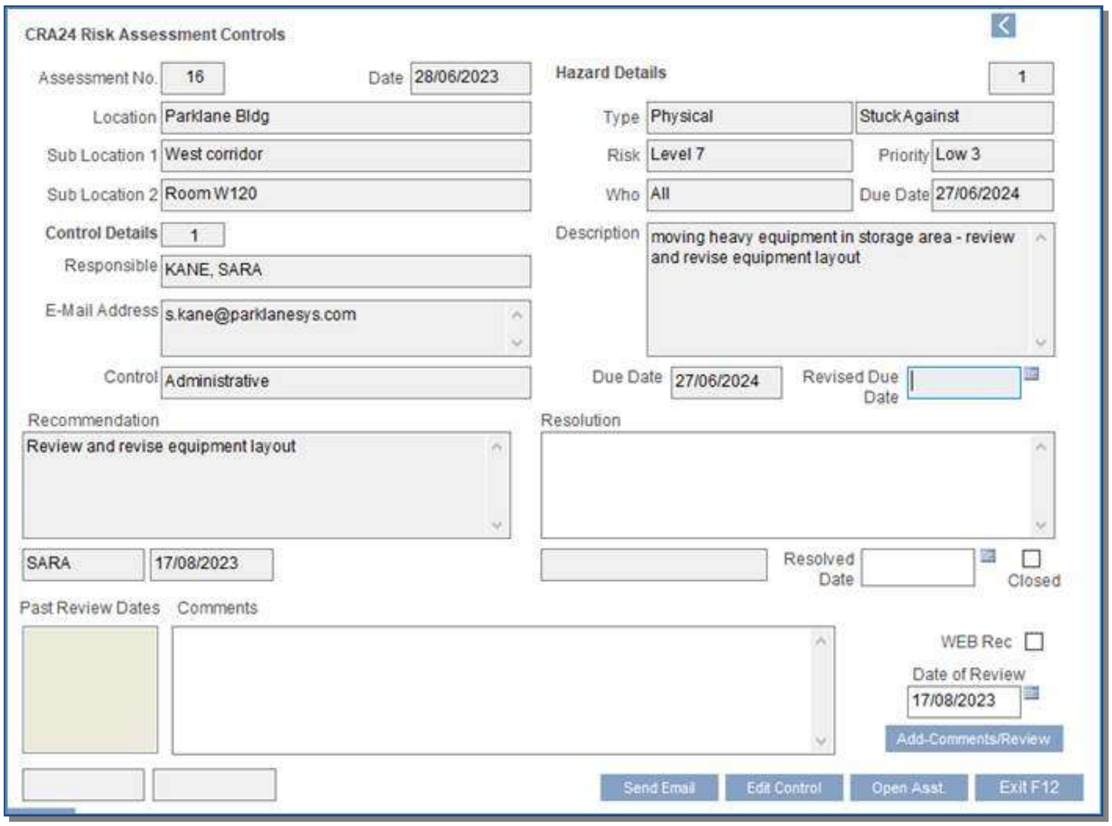
1. From the main menu of the Hazard Based Risk Assessment module, click **Review and Follow up Haz** tab on left sidebar.
2. The Review/Follow Up Selection panel will appear (Figure 34). Choose **Assessment Type** you wish to view.
3. Choose **Type of Review** you are making, i.e. controls, hazards.
4. Date options:
    a. Should you wish to see those records that are ***due between*** certain dates, fill out dates under **Next Review Date**.
    b. Clicking **Include Overdue Reviews** will bring in any outstanding reviews that are ***overdue*** outside the date range indicated.
    c. Leaving dates blank and clicking **Go** will return all open records regardless of due date
5. Should you wish to additionally filter by location, select the desired locations.
6. Once **Go** is selected, a list will appear below.



7. From the list, click on the record you wish to view
8. Another panel will open which contains details of the risk assessment
9. To advance to the next assessment on the selected list, click the direction arrow on the top right of the panel

Using the Review/Follow up

Once in an assessment, you may record your findings, close off any completed controls or hazards, or adjust due dates. The **Past Review Dates** comments keep a summary of all comments made about this record. This is used as follows:



Review comments:

1. Place cursor in **Comments** section.
2. **Date of Review** defaults to current date – you may change this date if necessary.
3. Write any comments regarding your review, i.e. call made to those responsible for status update.
4. If revised due date is necessary, you may change it at this point by entering new date in **Revised Due Date**.
5. Multiple comments can be made as Parklane will track each date under **Past Review Dates**. Read the comments by clicking on the comment date, which will bring up the comments the user made on that day.
6. Click **Exit F12** to return to the list or the directional arrow to advance to next review on selected list.

Closing Records

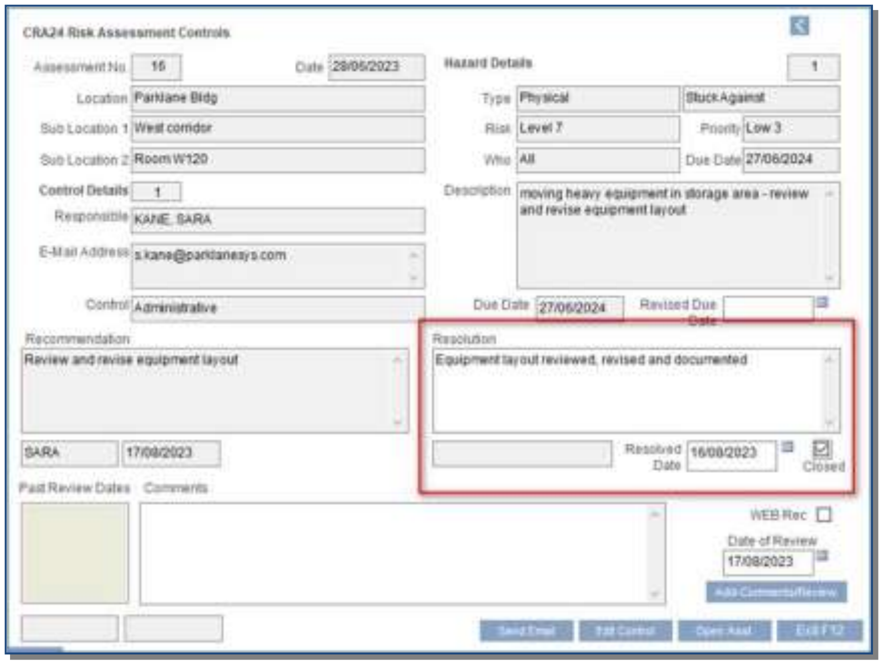
Closing a Control from Review/Follow Up

Note: Before a risk assessment record can be closed, all hazards and controls must be closed. Before a hazard can be closed, all of that hazard's controls must be closed. To close a control, you must have the resolution field completed and a resolved date.

1. Once the control has been resolved, the action that was taken will appear in the **Resolution** field, the resolved date will be populated and the name of the person who submitted the resolution will be present.

2. If you are satisfied with the action taken, click the **Closed** check box.

3. When refreshing your Review/Follow up list, this control will no longer appear on the list.



Should the control require attention, or there simply is no resolution provided by the due date, there are additional options available.

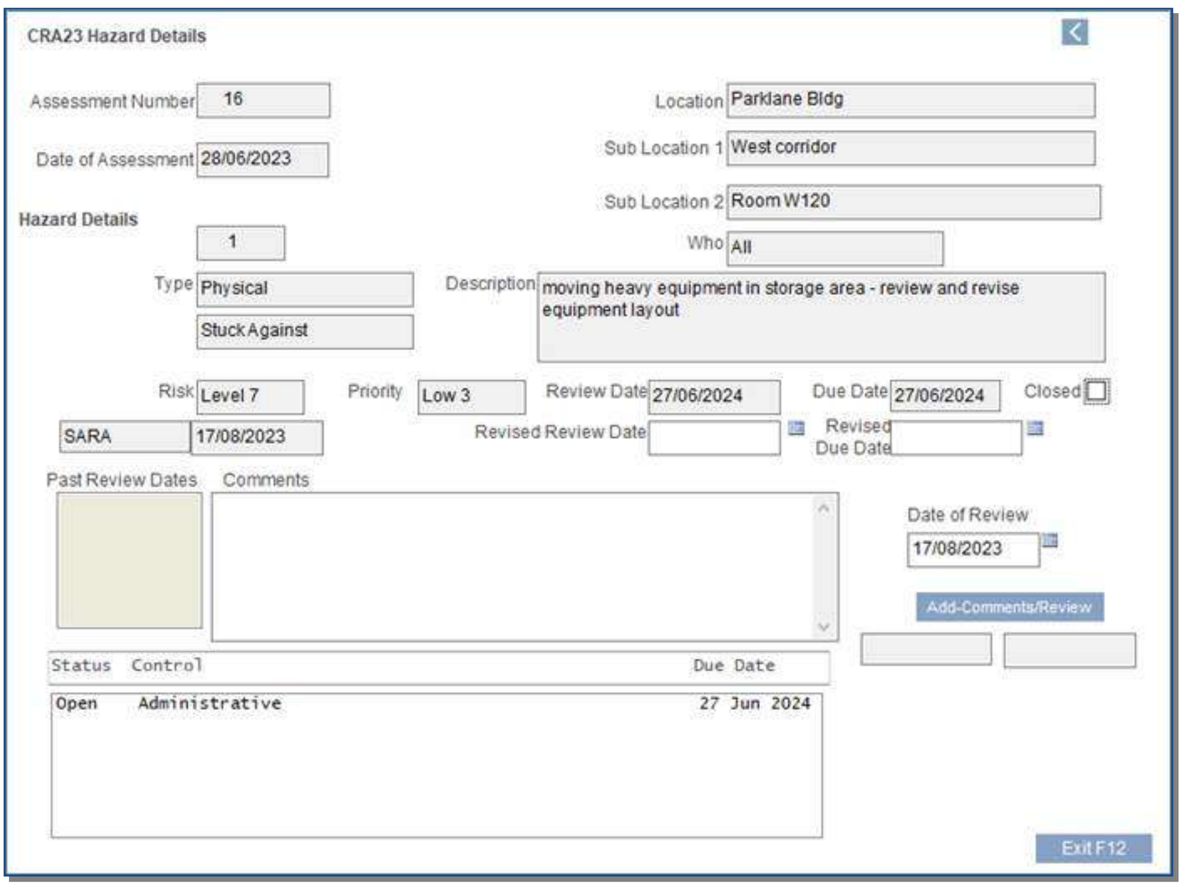
- **Send Email** – this will let you send off a reminder email to the person responsible indicating the resolution has not been received. This email will include the original hyperlink and details.
- **Revised Due Date** – should you wish to give the personal responsible additional time to complete the control, enter the new due date in the Revised Due Date field.
- **Edit Control** – Should you need edit this control, this button opens the record to allow you to edit the control and resend the email.
- **Open Asst**. – This function will bring you directly to the actual assessment. View all hazards, controls, inspectors, etc. Once complete, clicking closed will bring you back to the Review/Follow up page.

Closing a Hazard from Review/Follow Up

1. Follow steps outlined in Review/Follow Selection, choosing **Hazard** as the Type of Review.
2. Should all controls be closed, click **Closed** check box.
3. Exit, or advance to next hazard.

Closing a Risk Assessment from Review/Follow Up

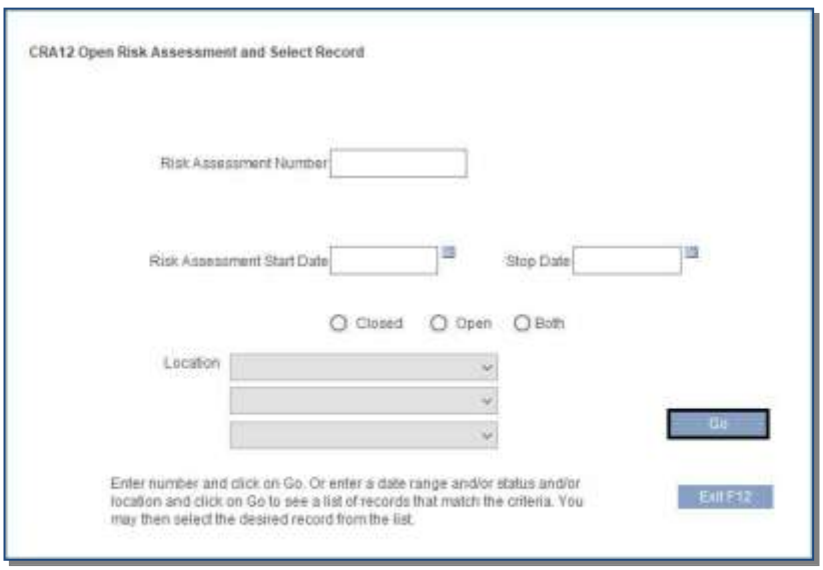
1. Follow steps outlined in Review/Follow Selection, choosing **Risk Assessment** as the Type of Review.
2. Should all hazards be closed, click **Closed** check box.
3. Exit, or advance to next risk assessment.



Searching for a Risk Assessment Record

Should a user wish to search for a record, a few options are available as search fields.

1. **Risk Assessment number**: Should the you be aware of the risk assessment number, type it in the **Risk Assessment Number** field and click **Go**.
2. **Risk Assessment Date**: If the date is known, or you wish to pull assessments that occurred between two dates, fill in the date fields as indicated and click **Go**.
3. **Status**: You may also narrow down the search further by indicating whether they wish to see *Closed assessments*, *Open assessments* or *Both*.
4. **Location**: If you wish to only see assessments that occurred in specific locations, you can narrow down your search by general location, or right down to the room number or specific location based on your location table.
5. **Go**: Simply click **Go** and a list of every risk assessment will be presented.

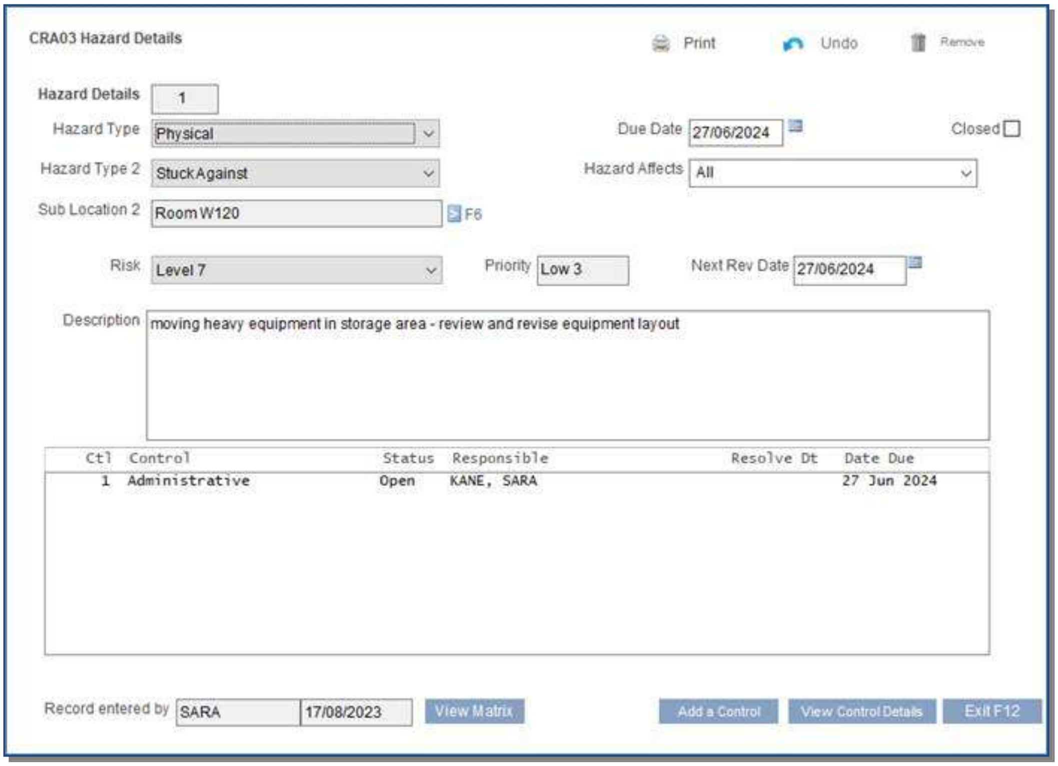


Closing Risk Assessments (Manual Method)

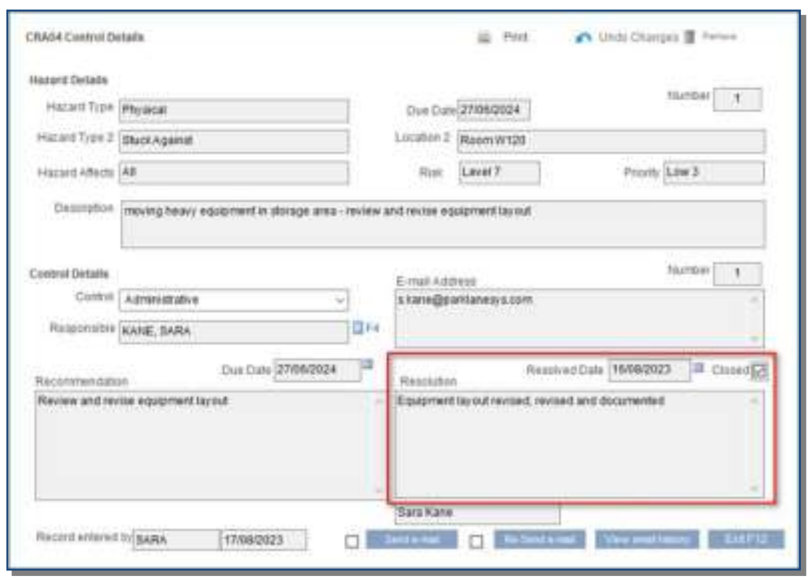
As controls are implemented and hazards eliminated, the user must keep the risk assessment record up to date. In addition to updating the record from the Review/Follow Up section, you can also update it by opening up the original record itself.

1. On the left sidebar, click **Open Hazard Assessment**
2. Search for the assessment and double click to open
3. Click on **Hazard Details** from the left side bar to bring up your hazard list
4. Choose the control you wish to close and double click

Note: To close a control, you must complete a resolution/action and the date it was resolved.



5. Enter resolution in the **Resolution** field.
6. Enter date in **Resolution Date** field.
7. Click on **Closed** checkbox to close.
8. Exit the control by clicking **Exit** button.
9. This will take you back to the hazard details and the status of the control in the window will say **Closed**. ***Note***: This control will no longer appear in the Review/Follow Up section.
10. Once all controls are completed, click **Closed** checkbox on the hazard details screen.
11. Once all hazards are closed, return to the risk assessment main page and click the **Closed** checkbox, unless annual or semiannual review is necessary.



12. Should this risk assessment need to be reviewed in a year or two, simply leave the Closed checkbox on the risk assessment main page *unchecked* and indicate desired follow up date in Next Review Date field.

Webforms

The Risk Assessment module also includes two webforms.

1. **Online Risk Assessment**
   Conduct hazard- based risk assessments on location on a mobile device (i.e. tablet) or laptop. Internet connection is required.

2. **Risk Response Form**
   Webform to provide response to emailed controls online.

The **Online Risk Assessment** operates similarly to the database, however, is limited. You may create an entire risk assessment and send your control emails, however, Review/Follow up, Comments, etc., are not available online.

When a control is emailed to someone for completion, the email contains a unique link that will bring them to the **Risk Response Form** online.

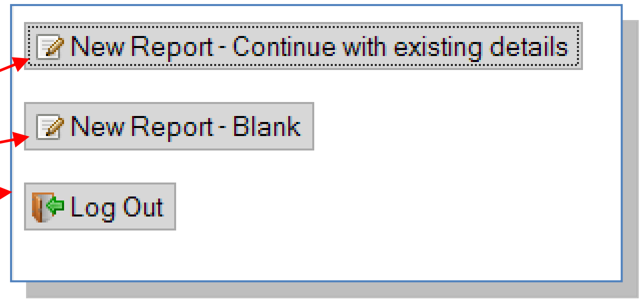
Online Risk Assessment

Using a tablet, laptop, or desktop, open the Online Risk Assessment (ORA) webpage and enter a passcode (see Passcodes and Email Recipients (page 14))

1. Fill in assessment details as described in **Add New Hazard Assessment**.
2. Indicate first what location (Sublocation 2) you are assessing by clicking: **Add a Location**. Once selected and confirmed ORA will default to say "There are no hazards associated with this location".
3. Should a hazard be found in this location, select **Add a Hazard** and complete details.
4. Add your control(s) and send your emails.
5. Continue assessment until next location is reached and then add your next location (step 2).
6. Once assessment is complete, click **Submit**.

Upon submission, three choices will appear.

- *Will create a new record but will fill in the same date, assessment type, inspector, and JHSC details for you.*
- *Will create a new blank record.*
- *Logs out of the online form.*

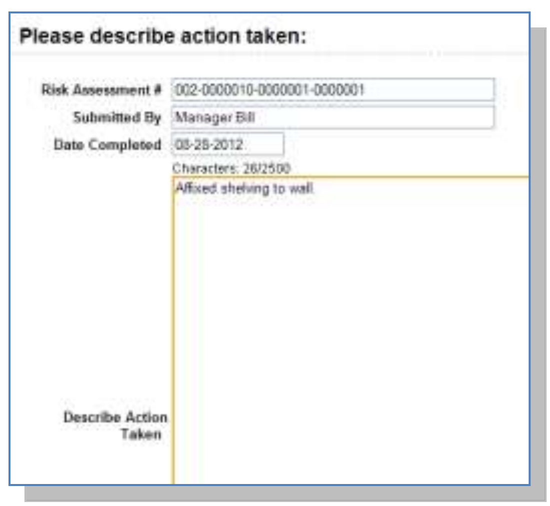


Another great feature of the ORA (making data entry on a tablet easier) is when searching for a name in the Parklane database. Once a name, or names, are chosen, the next time you search for a name, click **Past Selections**. This will bring up a list to choose from of the people you have searched for during this session.

Action Emails

The Hazard Based Risk Assessment module automatically will send an email when a specific Action is executed by an identified user. Because the user may not necessarily be a Parklane user, the user name will become "WEBOPER". If Action Emails are used, the user name "WEBOPER" must be added as a Parklane user in Security (see page 16).

Risk Response Form



Once those responsible have implemented your control, they must click on the link provided in the control email. They will be brought to the webform to fill only three fields:

1. Their name
2. Date the control was implemented
3. The action they took to control the hazard

Clicking **Submit** will submit this information directly to the Hazard Based Risk Assessment Module.

Parklane will take this information and populate the **Resolution** field with the contents of action taken, will include the submitter's name, and populate the **Date Resolved** field with the date it was implemented.

Viewing Webform Submitted Responses

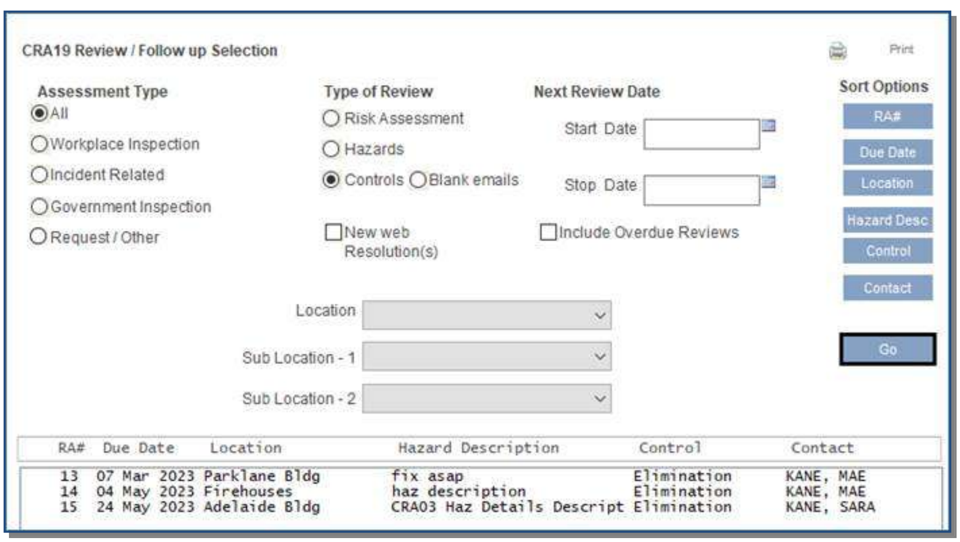
To review controls submitted using the Webform:

1. From main menu, click **Review/Follow Up.**
2. Click **All** radio button under Assessment Type.
3. Under Type of Review, check **New WEB.**
4. Click **Go.**
5. A list of all responses to controls will appear in window below.
6. Click on first to view the details.
7. Should you be satisfied with the submitted details, close the control and advance to next..

Viewing Blank Email Fields

Should you be unaware of the name or email address of the person responsible of the area at the time of submitting a Risk Assessment record on the webform, you can easily return to each control and update the field.

1. From main menu, click **Review/Follow Up**.
2. Click **All** radio button under Assessment Type and **Controls** under Type of Review.
3. An additional checkbox will appear called **Blank Emails**. Check this box.
4. Click **Go.**
5. A list of controls with no email assigned will appear.
6. Access each control, update information and send email if desired.



Time Saving Features

Copy Details

While in an assessment, the **Copy Details** button will initiate another assessment using the same details on that panel. Therefore, it will copy over the date, location, assessment type, inspector name, JHSC/Gov Inspector names(s) and any additional inspectors. This feature is especially useful when recording multiple assessments and eliminating the need to re-enter all of the same details

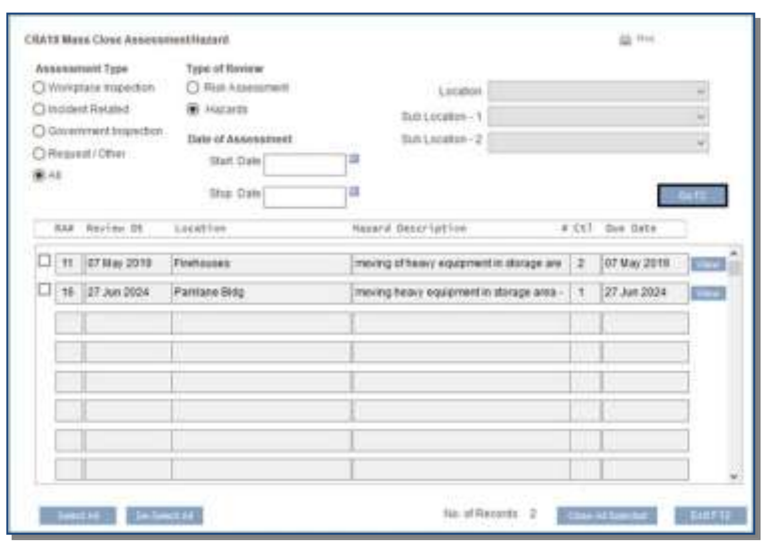
Duplicate Assessment

While in an assessment, the **Duplicate Assessment** button will initiate another assessment and duplicate the entire record. This includes everything included in Copy Details, but also includes the associated hazards and controls.

Mass Close Assessment and Hazards

This feature, located on the side bar, will display a panel in which you may filter out all hazards that have all closed controls and/or all risk assessments that have closed all hazards. This essentially is a time saving feature which helps you keep your database clean by ensuring all hazards and risk assessments that are open and need to be closed, can be closed quickly.

1. Choose **Assessment Type** and **Type of Review** (min).
2. Select any additional filters required.
3. Click **Go**.
4. Click **View** to open and view the record if desired.
5. Check off hazards or risk assessments you wish to close.
6. Click **Close All Selected**.



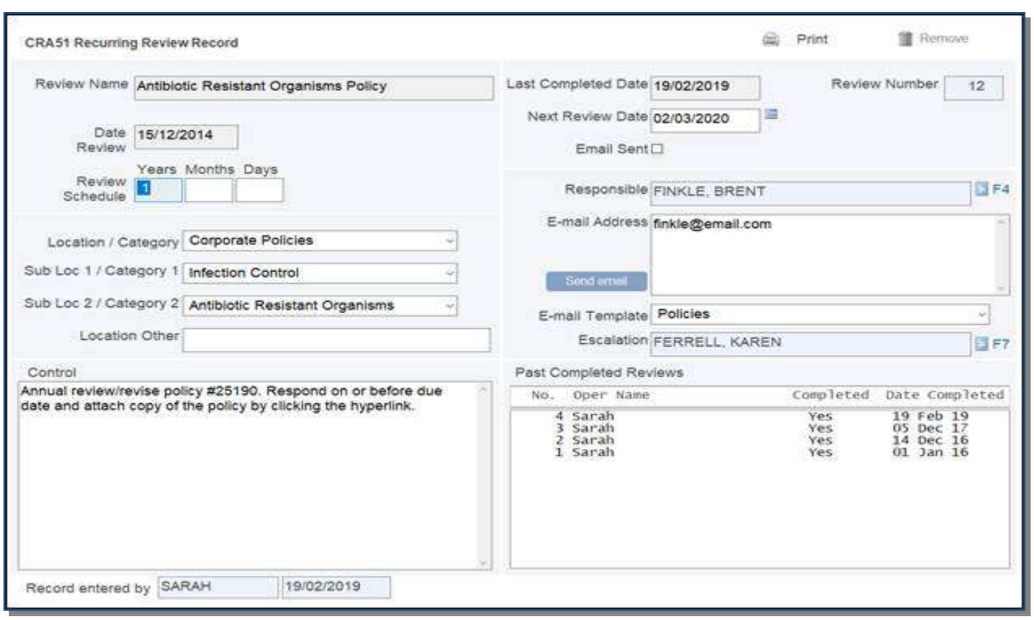
Using Recurring Review

Risk Assessment's Recurring Review section was designed to assist your organization in remaining compliant in reviewing and revising your corporate health and safety policies, standard operating procedures, etc. To this, you may also wish to track other tasks that aide in the prevention of illness or injury to your workers – ie. Eye wash inspections and Fire Drills.

Recurring Review Record

Adding a record:

1. Select **Add Record**.
2. Enter the Policy name or other recurring review name – eg. Cleaning and Disinfection Policy.
3. Under **Date Review**, enter the date the policy was last reviewed.
4. Enter the number of years, months or days the system is to calculate the next review .
5. Select 3 **Locations** or **Categories** in which the review belongs – eg. Adelaide Building, Policies, Infection Control.
6. In the **Control** section, enter the specific instructions for completing this review.
7. Select the **F4** button to select the person **Responsible** for ensuring the review is completed – if email addresses are included on employee files in Personal Data, the address will automatically populate the email section.
8. To add multiple email recipients, enter a semi-colon after each email entry.
9. Select the **F7** button to select a person to **Escalate** any overdue reviews – once a review becomes overdue, the person selected will receive an email indicating the review is past due.
10. When complete, exit the panel.



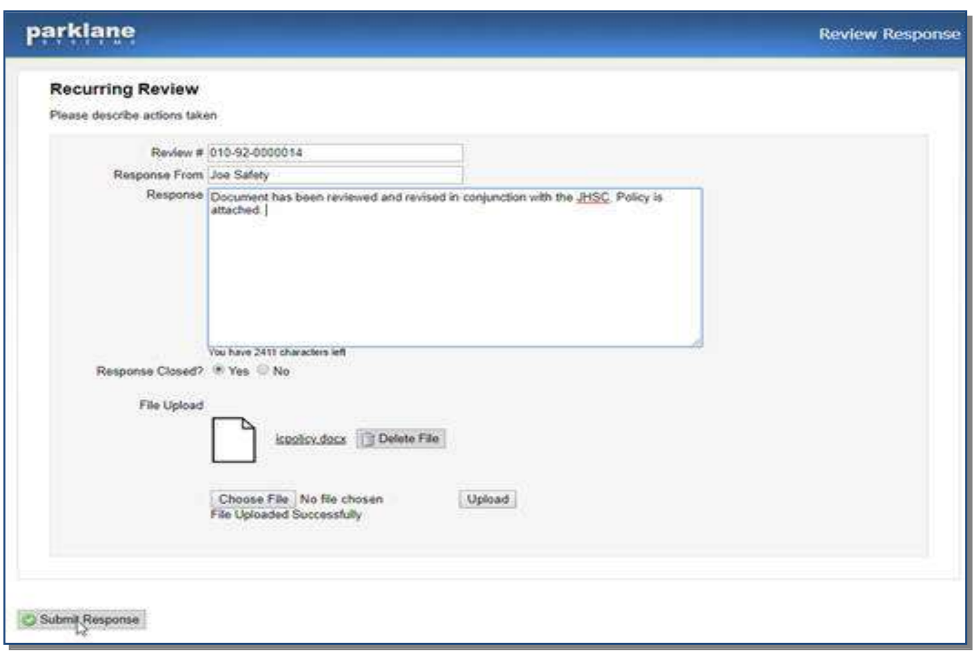
Entering Review Response

Fifteen days prior to a review coming due, the system will email the person responsible, notifying them of the upcoming review. The email notification contains a system-generated hyperlink which will open a web form where the recipient can respond to the notification. Responses can also be entered within the system itself.

Responding Online

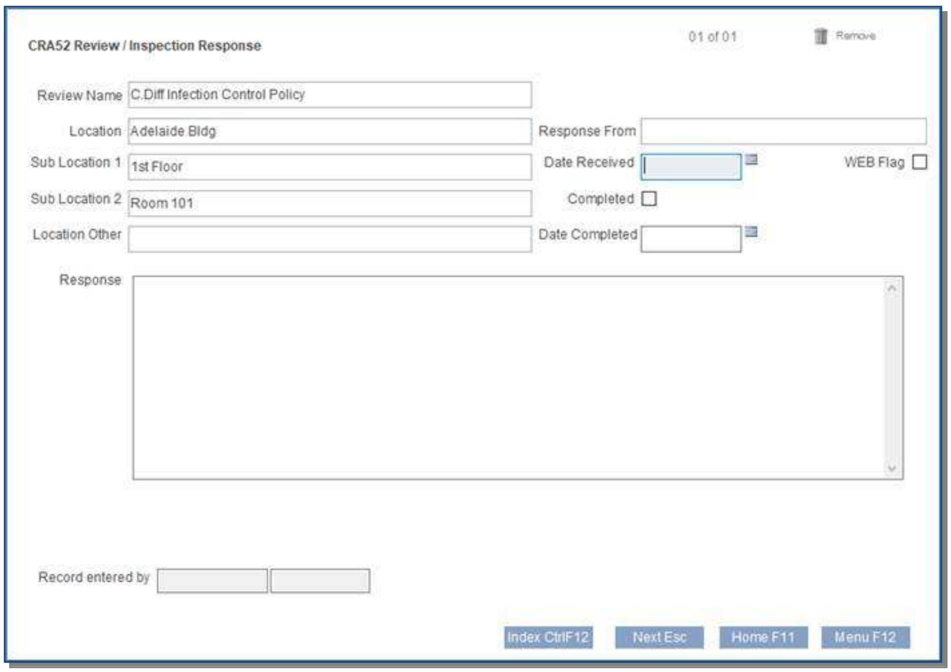
1. On receipt of the notification email, read detailed instructions.
2. Click on the hyperlink included in the attached PDF.
3. Enter name of person providing the response.
4. In the **Response** section, enter any details you wish documented in the system with the review.
5. Indicate the status of the review.
6. Selecting **Yes** indicates the review is complete and tells the system to calculate the next review date.
7. Selecting **No** indicates the review is not complete and simply records a response on the review record.
8. If there is an attachment to submit (eg. revised policy), select **Choose File**, search for document, then select **Upload**.
9. When complete, click **Submit Response**.

Note: the system will attach the document with today's' date and file name in Document Links on that record.



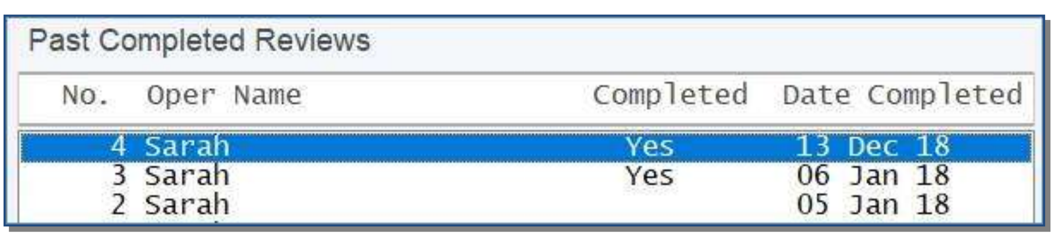
Responding In Parklane

1. From the sidebar, choose **Open Review**, then search for and double click on desired review
2. Select **Enter Review Response** from the sidebar
3. Enter the date the response was issued
4. If review is complete, select **Completed** checkbox and indicate the date of completion
5. Enter the response received by the person responsible in the **Response** field



Past Reviews

Risk Assessment will keep track of all past reviews. In a recurring review record, there is a window on the bottom right of the panel. This panel will list all response submissions and indicate those responses in which the person responsible indicated the review was completed. To access any of these responses, double click on the one you wish to view.

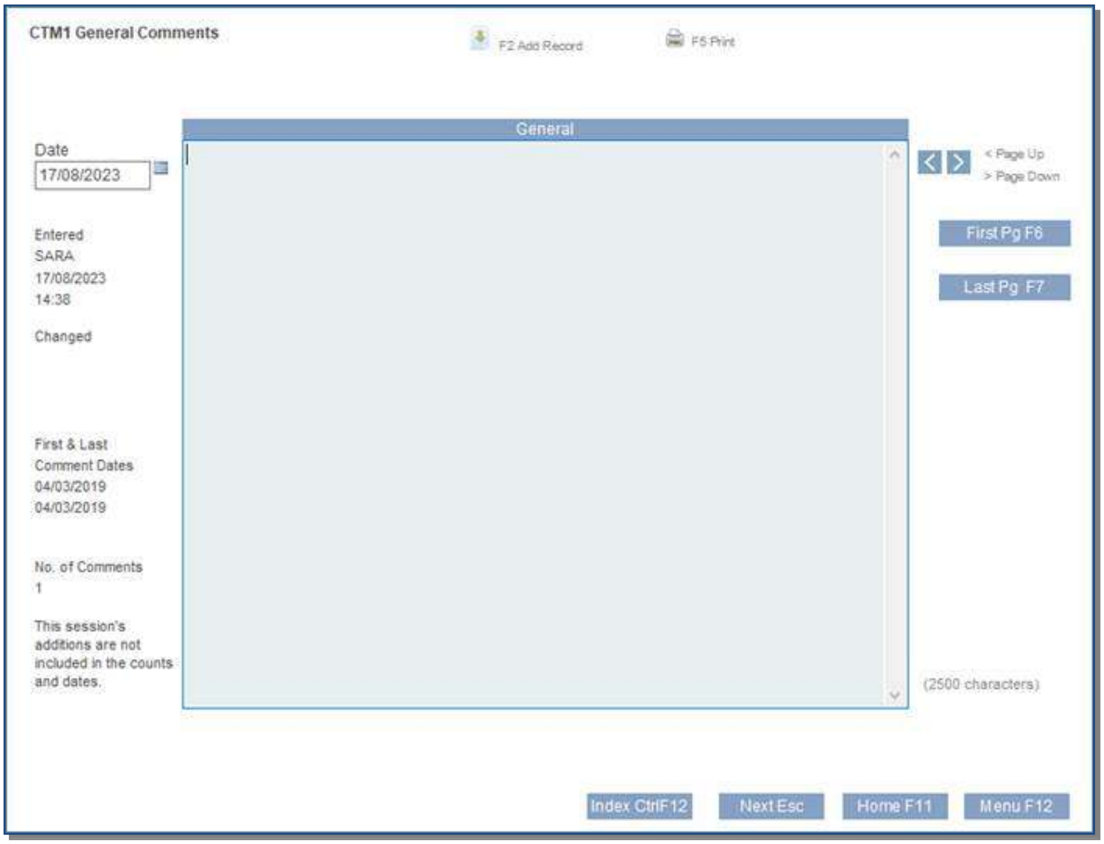


Past Completed Reviews

No.	Oper Name	Completed	Date Completed
4	Sarah	Yes	13 Dec 18
3	Sarah	Yes	06 Jan 18
2	Sarah		05 Jan 18

Review Comments

Referring to the Sidebar menu select the next panel **General Comments**. Comments may be documented on this panel. Today's date will auto-fill the Date field upon accessing this panel. The date may be changed if necessary. This is the ideal location in a program record to do your detailed documentation. This panel will assist in the elimination of a paper program file.



Review Document Folders

The **Document Folder** feature allows the user to paste text documents or type notes for future review. (Text only, no pictures or images.) The maximum number of characters is 8,000 (equivalent to approximately two pages of a MS Word document). The format of the document may vary slightly from the original document. Once a document is entered, changes may be made until midnight and only by the original author. The **See List** feature lists all documents in the Document Folders.

Access to the **Remove** function is controlled by Security.

Review Document Links

Automatic Document Links

When a document is received via online response page, the document is automatically attached to the document links section in the applicable recurring review record. The document date is provided by the system at the time of submission. The document description is populated with the name of the attached document.

Manual Document Links

The **Documents Links** feature allows the user to link and view electronic documents that are related to the employee's program.

Documents that can be linked include, but are not limited to:

- Documents (.doc, .pdf)
- Images (.jpg, .gif)
- Spreadsheets (.xls)
- Emails (.msg, .html)

In Work Accommodation, documents are linked directly to the employee. Move the cursor to the **Origin** column of the first blank line. Enter an **Origin** and **Description** of the document. The system will auto-fill the user and date entered. Click on **Link**. The Windows dialogue box will open and allow the selection of the document to be linked. A note will appear confirming the document was linked successfully.

To see a document, highlight the appropriate line and click **View**. The system will call up that document. Up to 800 documents may be linked to one employee.

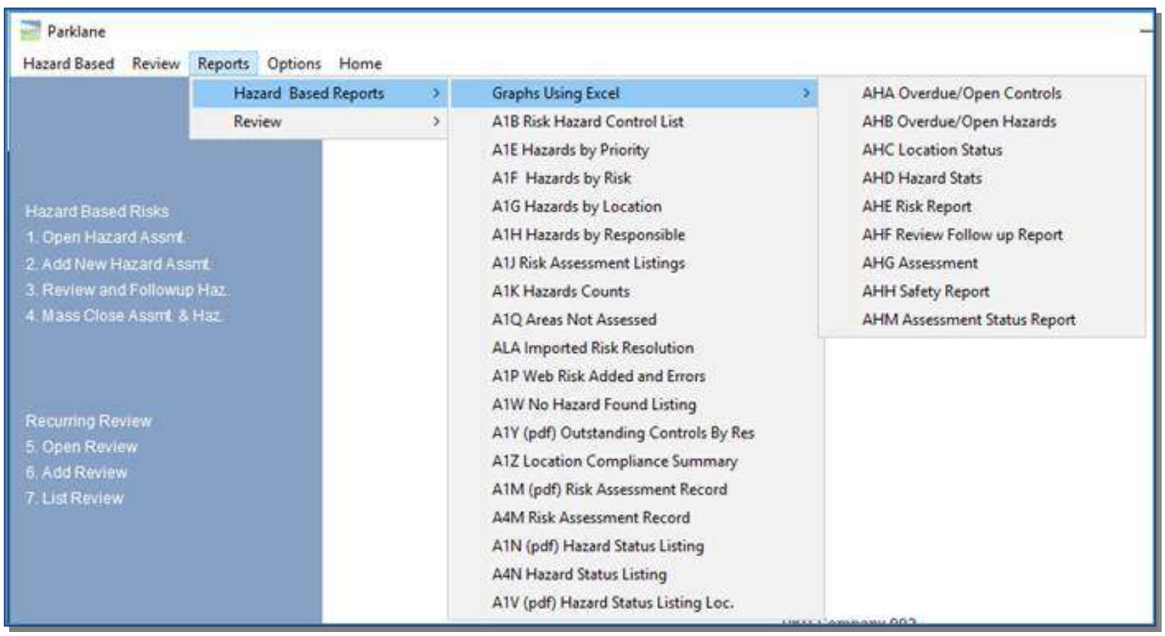
Access to the **Remove** function is controlled by Security. Click **Remove** to delete link.

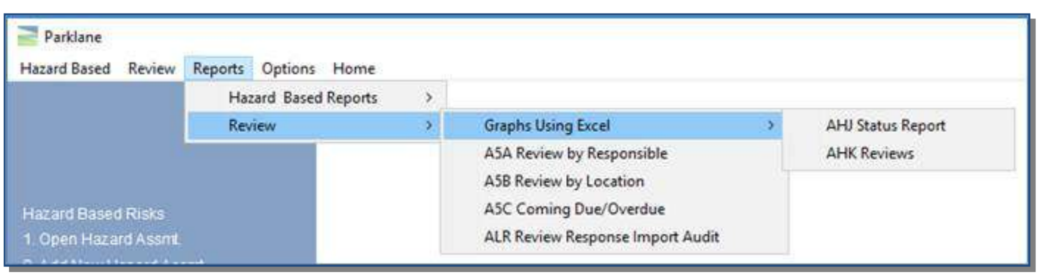
For details on Document Types, Scanning Documents, Location of Original Document, and other considerations, please refer to Parklane Support of the Special Features User Guide.

Reports

Parklane reports are found along the top menu bar. Simply make your selection and follow the queries to produce the desired report. These reports can be printed to PDF and emailed.

- Graphs Using Excel are designed, formatted, print-ready and customizable.
- Most reports within Hazard Based Risk Assessment can also be exported to txt file or directly to Excel for further analysis.
- Some of the reports in Hazard Based Risk Assessment are specifically designed to go directly to PDF. If you do not have a PDF writer on your workstation, Parklane provides one for their clients on the Parklane Forum.
- Should you not find the report you are looking for, call Parklane Support for assistance!





Index

N

O

R

S

T

V

W

PARKLANE SYSTEMS

10-521 Nottinghill Road

London, ON N6K 4L4

Canada

519.657.3386

ContactUs@parklanesys.com

Access the Parklane web site for more details about Parklane products

www.parklanesys.com