

## 1.1. Introduction

This guide is to assist users to generate Incident and Hazard reports for their area/ business unit that they are responsible for through CHARM

## 1.2. Privacy of Information

Reports generated from CHARM contain personal information and care should be taken when distributing reports.

In accordance with the University's Values and Signature Behaviours, members of the University community are responsible for respecting an individual's right to privacy.

## 1.3. Generating Reports

Managers/Supervisors are able to generate reports via their own log-in and dashboard. This allows users to have 24/7 access to generate reports for their areas, which can be referred to in Health & Safety Sub Committees, Safety meetings and general department/area meetings. Health and Safety will continue to provide executive performance reports and ad-hoc reporting requests.

An extensive number of reports are available to analyse area/department data. There are many criteria within each report that can be selected to customize your report.

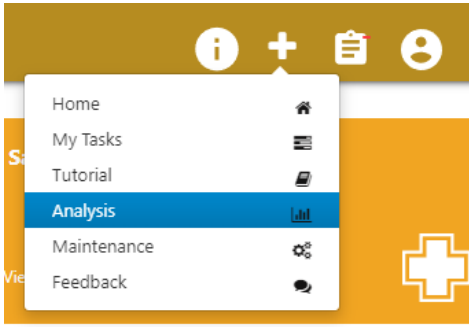
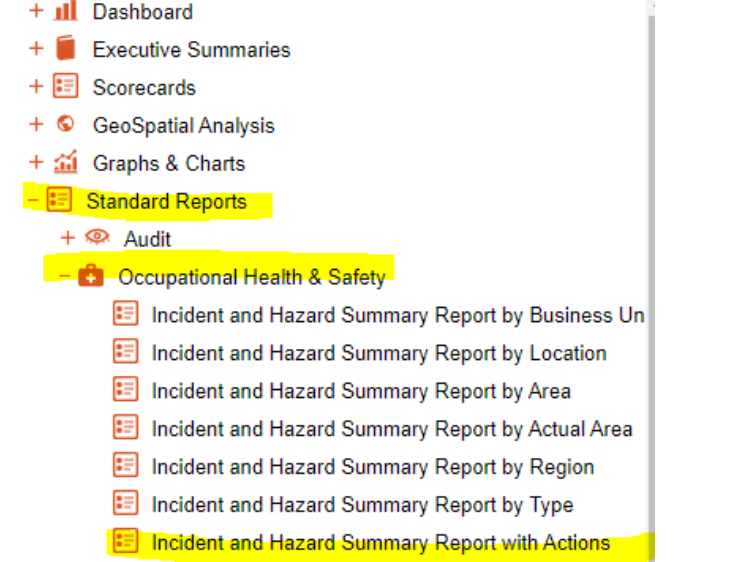
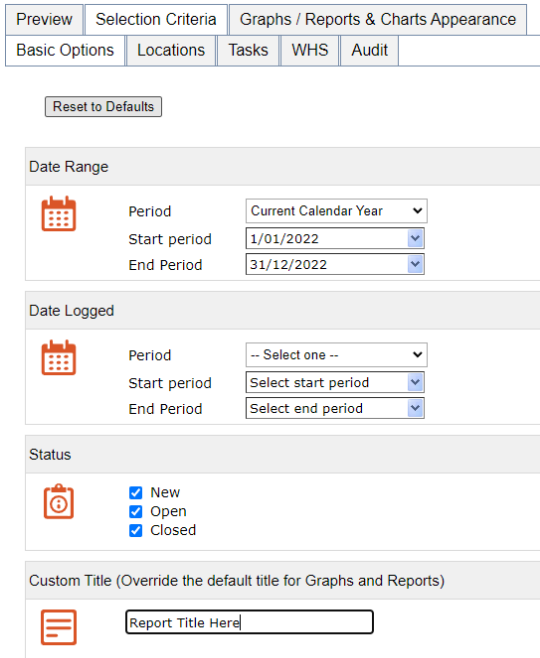
The following list contains recommended reports that can be generated through CHARM

- 1. Incident and Hazard Summary report with Actions**
- 2. Injury Summary by Mechanism of Injury**
- 3. Tasks Reports**

## 1. Incident and Hazard Summary report with Actions


The Incident and Hazard Summary report with Actions generates a pdf report with the incident/hazard description and corrective actions which have been identified in the action plan.

This report can be generated for monthly reports, as this report contains **both incident/hazard and action information**. The action information can assist users to see if actions are completed, incomplete or overdue their expected completion date.

<p><b>To generate an Incident and Hazard Summary report:</b></p> <ol style="list-style-type: none"> <li>From any page on CHARM, click on the + button on the top right corner of the screen and click <b>Analysis</b></li> </ol>	
<ol style="list-style-type: none"> <li>Expand the <b>Standard Reports</b> drop down list</li> <li>Expand the <b>Occupational Health &amp; Safety</b> drop down list</li> <li>Click on <b>Incident and Hazard Summary Report with Actions</b></li> </ol>	
<ol style="list-style-type: none"> <li>Click on the <b>Selection Criteria</b> tab</li> <li>Select your <b>Date Range</b> using the calendar drop down lists</li> <li>Under "<b>Status</b>" tick the <b>New and Open and Closed</b> checkboxes. To view incidents/hazards with a status of New, Open and Closed.</li> <li>Enter a title for the report in the <b>Custom Title</b> free text box section.</li> </ol>	

9. Click on the “**preview**” tab
  
10. **Business Unit Level:** select which business unit level you would like the report results to group as.  
  
 E.g. Level 1 – Results will group as “Curtin University”.  
 Level 2 – Results will group as “Office of the Provosr”
  
11. Click on the **Submit** button

**Prepare Report By**




Report by person responsible

▼

---

**Business Unit Level**



Faculty/Area


▼

Submit

12. The report results will appear in a pdf viewer in the **Preview** tab available for download.
  
13. Depending on your browser, hover over the top middle or right section of the report where a task bar and save/download icon will appear.
  
14. Click on the save/download or print icons to download or print the pdf report.



Figure 1. Example: Incident/Hazard Summary Report with Actions

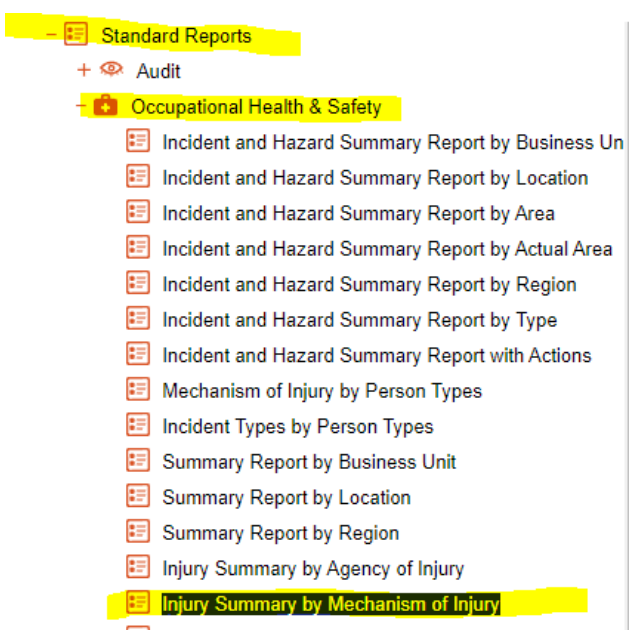
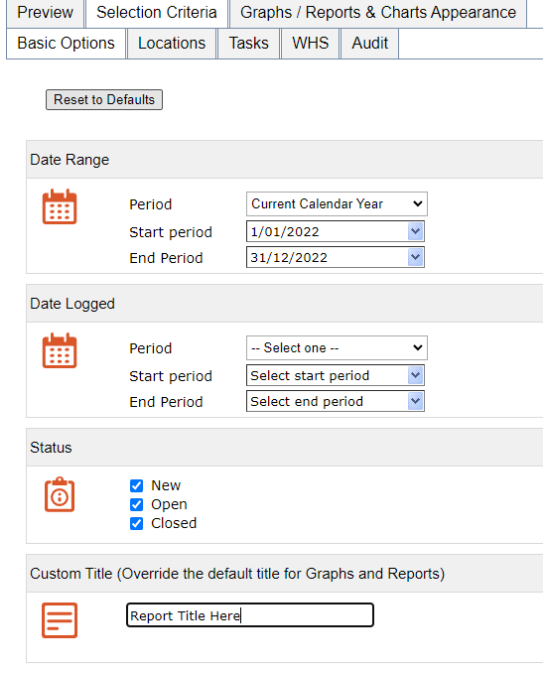
Ref.	Date Occurred	Status	Actual Location	Person Responsible	Inherent Level	Residual Level
<div style="display: flex; justify-content: space-between; align-items: center;">  <div style="text-align: center;"> <h3>Incident and Hazard Summary Report with Actions</h3> <p>Date of Report: Wednesday, 30 November 2016</p> </div> </div>						
<b>Faculty of Health Sciences - 3 Incident(s) 0 Hazard(s)</b>						
67	18-10-2016 10:10 AM	New	306 Pharmacy	OHS TEST		
<i>Staff member was walking into room 101 when she tripped on the carpet</i>						
69	18-10-2016 10:09 AM	Open	111 Curtin Stadium	OHS TEST	Low	Low
<i>The person went to jump for the ball and was bumped by another player. She then landed awkwardly and rolled her ankle</i>						
<b>Control Method:</b>				<b>Person Responsible:</b>	OHS TEST	
<b>Expected Completion Date:</b>		18-10-2016		<b>Actual Completion Date:</b>	02-11-2016	
<b>Description:</b>		Risk is low - therefore actions not required.				
<b>Control Method:</b>		5 - Administration		<b>Person Responsible:</b>	OHS TEST	
<b>Expected Completion Date:</b>		28-10-2016		<b>Actual Completion Date:</b>	Incomplete	
<b>Description:</b>		Staff member to place an scc request to have the ceiling tile fixed				
<b>Control Method:</b>		5 - Administration		<b>Person Responsible:</b>	OHS TEST	
<b>Expected Completion Date:</b>		30-10-2016		<b>Actual Completion Date:</b>	Incomplete	
<b>Description:</b>		Staff member to place an scc request to have the ceiling tile fixed				
<b>Control Method:</b>		4 - Engineering		<b>Person Responsible:</b>	OHS TEST	
<b>Expected Completion Date:</b>		30-11-2016		<b>Actual Completion Date:</b>	Incomplete	
<b>Description:</b>		Place barrier around the area				
<b>Control Method:</b>		4 - Engineering		<b>Person Responsible:</b>	OHS TEST	
<b>Expected Completion Date:</b>		24-10-2016		<b>Actual Completion Date:</b>	Incomplete	
<b>Description:</b>		Place barrier around the area				
83	24-10-2016 09:11 AM	Open	308 Biomedical Sciences	OHS TEST	Medium	Low

## 2. Injury Summary by Mechanism of Injury

The Injury Summary by Mechanism of Injury report produces a pdf report with a colourful pie graph of the mechanisms of injury and a description of the incidents/hazards broken down into mechanism categories.

This report is useful to identify the leading mechanisms of incidents/hazards occurring in your area.

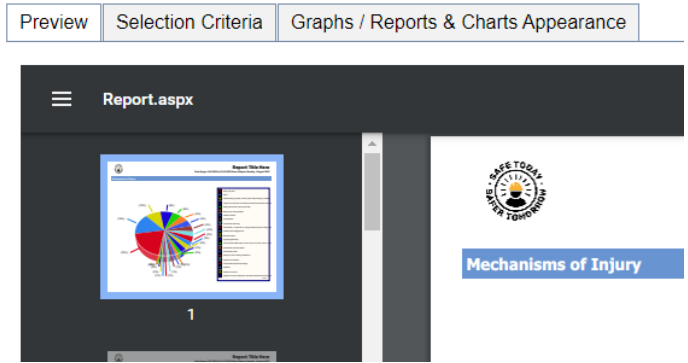
For example in *Figure 3.2* you can see 3 of the 6 incidents are related to slips, trips and falls. This information can assist to identify that further actions that may need to be put in place to prevent slip, trips and falls.

<p><b>To generate an Injury Summary by Mechanism of Injury report:</b></p> <ol style="list-style-type: none"> <li>1. Go to the <b>Analysis</b> tab</li> <li>2. Expand the <b>Standard Reports</b> drop down list</li> <li>3. Expand the <b>Occupational Health &amp; Safety</b> drop down list</li> <li>4. Click on Injury Summary by Mechanism of Injury</li> </ol>	 <p>The screenshot shows a navigation menu with the following items:</p> <ul style="list-style-type: none"> <li>Standard Reports             <ul style="list-style-type: none"> <li>Audit</li> <li>Occupational Health &amp; Safety                     <ul style="list-style-type: none"> <li>Incident and Hazard Summary Report by Business Un</li> <li>Incident and Hazard Summary Report by Location</li> <li>Incident and Hazard Summary Report by Area</li> <li>Incident and Hazard Summary Report by Actual Area</li> <li>Incident and Hazard Summary Report by Region</li> <li>Incident and Hazard Summary Report by Type</li> <li>Incident and Hazard Summary Report with Actions</li> <li>Mechanism of Injury by Person Types</li> <li>Incident Types by Person Types</li> <li>Summary Report by Business Unit</li> <li>Summary Report by Location</li> <li>Summary Report by Region</li> <li>Injury Summary by Agency of Injury</li> <li><b>Injury Summary by Mechanism of Injury</b></li> </ul> </li> </ul> </li> </ul>
<ol style="list-style-type: none"> <li>5. Click on the <b>Selection Criteria</b> tab</li> <li>6. Select your <b>Date Range</b> using the calendar drop down lists</li> <li>7. Under “<b>Status</b>” tick the <b>New</b> and <b>Open</b> and <b>Closed</b> checkboxes.</li> <li>8. Enter a title for the report in the <b>Custom Title</b> free text box section.</li> </ol>	 <p>The screenshot shows the configuration interface for the report with the following sections:</p> <ul style="list-style-type: none"> <li>Navigation tabs: Preview, Selection Criteria (selected), Graphs / Reports &amp; Charts Appearance</li> <li>Basic Options: Locations, Tasks, WHS, Audit</li> <li>Reset to Defaults button</li> <li>Date Range section:             <ul style="list-style-type: none"> <li>Period: Current Calendar Year</li> <li>Start period: 1/01/2022</li> <li>End Period: 31/12/2022</li> </ul> </li> <li>Date Logged section:             <ul style="list-style-type: none"> <li>Period: -- Select one --</li> <li>Start period: Select start period</li> <li>End Period: Select end period</li> </ul> </li> <li>Status section:             <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> New</li> <li><input checked="" type="checkbox"/> Open</li> <li><input checked="" type="checkbox"/> Closed</li> </ul> </li> <li>Custom Title (Override the default title for Graphs and Reports):             <ul style="list-style-type: none"> <li>Report Title Here</li> </ul> </li> </ul>

9. Click on the “**preview**” tab

10. **Business Unit Level:** select **Level 3** from the drop down list

11. Click on the **Submit** button



12. The screen will go to the **Preview** tab and the report will appear in a pdf format in the pdf viewer to download.

13. Hover over the top right section of the report where a task bar will appear.

14. Click on the download icon to download the pdf report.

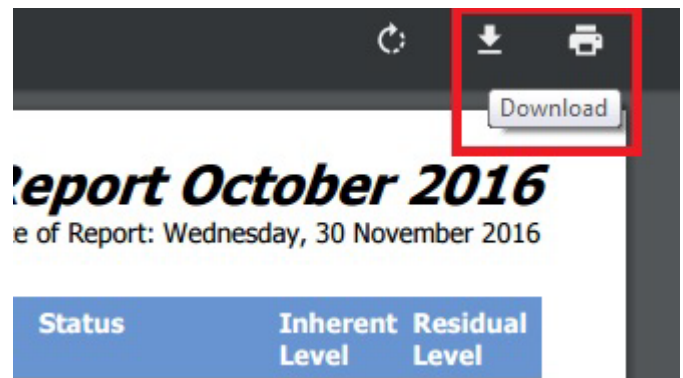


Figure 3.1 Example: Injury Summary by Mechanism of Injury

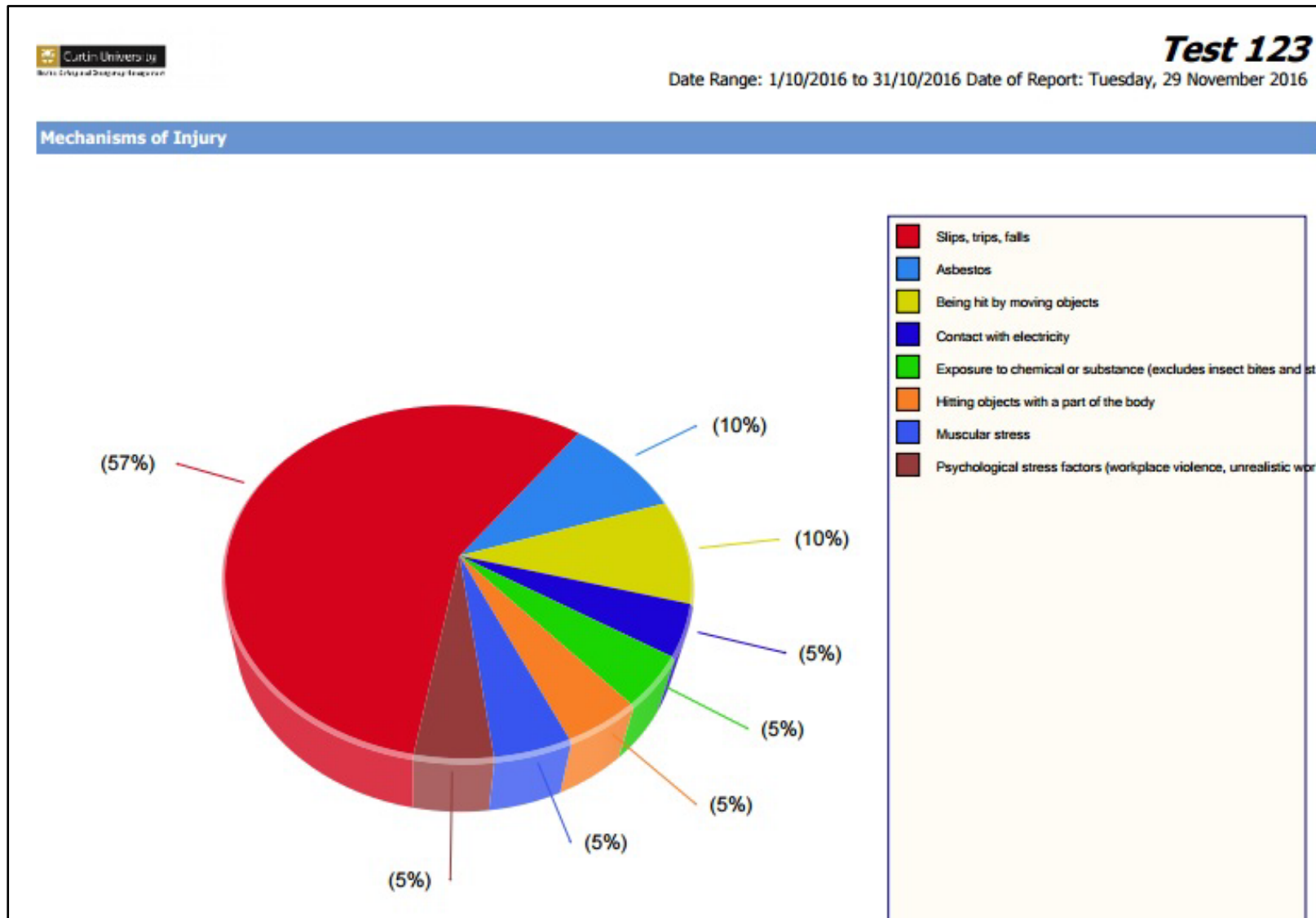





Figure 3.2 Example: Injury Summary by Mechanism of Injury


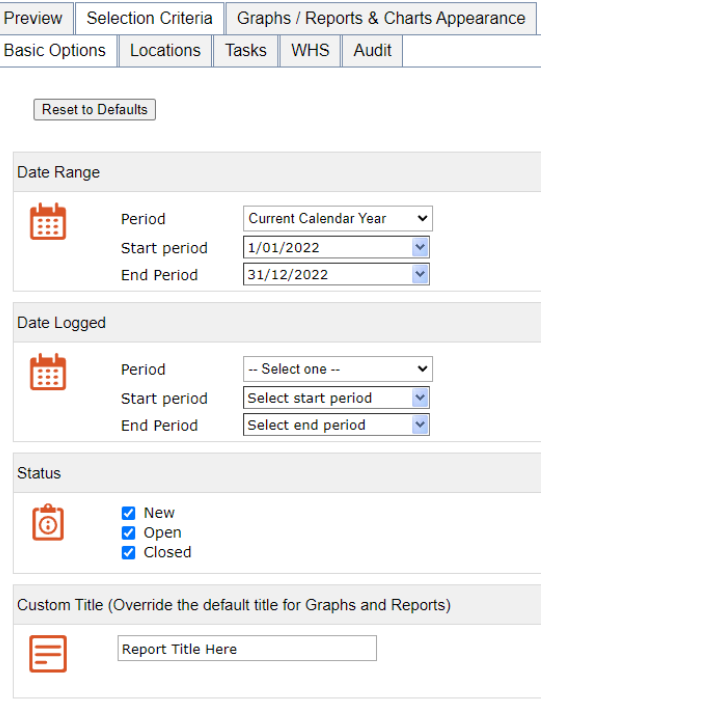
Ref.	Date Occurred	Person Responsible	Actual Location	Agency of Injury	Mechanism of Injury	Nature of Injury	Bodily Location	Status
<div style="display: flex; justify-content: space-between; align-items: center;">  <div style="text-align: right;"> <b>test1234</b>                      Date Range: 1/10/2016 to 31/10/2016 Date of Report: Tuesday, 29 November 2016                 </div> </div>								
<b>Contact with hot objects - 1 Incident(s) 0 Hazard(s)</b>								
85	24-10-2016 10:11 AM	Test employee	306 Pharmacy	Live animals	Contact with hot objects	Burns	Feet and toes	Closed
<i>(staff) was preparing his coffee and spelt some of the hot water on himself while handling the teaspoon.</i>								
<b>Muscular stress - 2 Incident(s) 0 Hazard(s)</b>								
59	14-10-2016 08:26 AM	Test employee	601 FSE Lab	Machinery and fixed plant	Muscular stress	Sprain or strain	Hands and fingers	Closed
<i>RSI using computer mouse</i>								
63	14-10-2016 08:53 AM	Test employee	402 Curtin Business School 1	Other materials, substances or objects	Muscular stress	Disorders of muscle, tendons and other soft tissues	Back	Closed
<i>Bent over to lift archive boxes when I felt a sharp pain in my back</i>								
<b>Slips, trips, falls - 3 Incident(s) 0 Hazard(s)</b>								
67	18-10-2016 10:10 AM	Test employee	306 Pharmacy	Indoor environment	Slips, trips, falls	Sprain or strain	Face	New
<i>Staff member was walking into room 101 when she tripped on the carpet</i>								
69	18-10-2016 10:09 AM	Test employee	111 Curtin Stadium	Indoor environment	Slips, trips, falls	Sprain or strain	Hips and legs	Open
<i>The person went to jump for the ball and was bumped by another player. She then landed awkwardly and rolled her ankle</i>								
83	24-10-2016 09:11 AM	Test employee	308 Biomedical Sciences	Indoor environment	Slips, trips, falls	Other	Hands and fingers	Open
<i>The person was walking into Room 238 and she tripped over a curling piece of flooring. She banged her hand on the corner of the desk, and sustained a cut which required first aid (bandaid) but was otherwise unhurt.</i>								
<b>Total - 6 Incident(s) 0 Hazard(s)</b>								



## 3. Tasks Report

A Tasks report produces a pdf report to show the corrective actions/ tasks that have been identified across all CHARM modules. This report is useful to identify what corrective actions/ tasks are currently open or overdue.

An overdue tasks report generates a pdf report which flags any tasks that have not been completed prior to their assigned due date.

<p><b>To generate a tasks report</b></p> <ol style="list-style-type: none"> <li>1. Click on <b>Analysis</b> (top right menu bar)</li> <li>2. Expand the <b>Standard Reports</b> drop down list</li> <li>3. Expand the <b>Task Management</b> drop down list</li> <li>4. Click on <b>Tasks - by Business Unit</b></li> </ol>	 <ul style="list-style-type: none"> <li>+ Dashboard</li> <li>+ Executive Summaries</li> <li>+ Scorecards</li> <li>+ GeoSpatial Analysis</li> <li>+ Graphs &amp; Charts</li> <li>- <b>Standard Reports</b> <ul style="list-style-type: none"> <li>+ Audit</li> <li>+ Occupational Health &amp; Safety</li> <li>+ Positive Safety Observations</li> </ul> </li> <li>- <b>Task Management</b> <ul style="list-style-type: none"> <li>Tasks - Business Unit Scorecard</li> <li>Tasks - Location Scorecard</li> <li>- <b>Tasks - by Business Unit</b></li> <li>Tasks - by Location</li> </ul> </li> <li>+ Custom Reports</li> <li>+ Ad Hoc Reporting</li> </ul>
<ol style="list-style-type: none"> <li>5. Click on the <b>Selection Criteria</b> tab</li> <li>6. Select your <b>Date Range</b> using the calendar drop down lists</li> <li>7. Under "<b>Status</b>" tick the <b>New</b> and <b>Open</b> checkboxes to view tasks for new and open checklists.</li> </ol> <p><i>Note: The Closed checkbox is not required to be ticked as these actions will already be completed unless you wish to include closed tasks into your report.</i></p>	 <p>Preview   Selection Criteria   Graphs / Reports &amp; Charts Appearance</p> <p>Basic Options   Locations   Tasks   WHS   Audit</p> <p>Reset to Defaults</p> <p><b>Date Range</b></p> <p>Period: Current Calendar Year</p> <p>Start period: 1/01/2022</p> <p>End Period: 31/12/2022</p> <p><b>Date Logged</b></p> <p>Period: -- Select one --</p> <p>Start period: Select start period</p> <p>End Period: Select end period</p> <p><b>Status</b></p> <p><input checked="" type="checkbox"/> New</p> <p><input checked="" type="checkbox"/> Open</p> <p><input type="checkbox"/> Closed</p> <p>Custom Title (Override the default title for Graphs and Reports)</p> <p>Report Title Here</p>

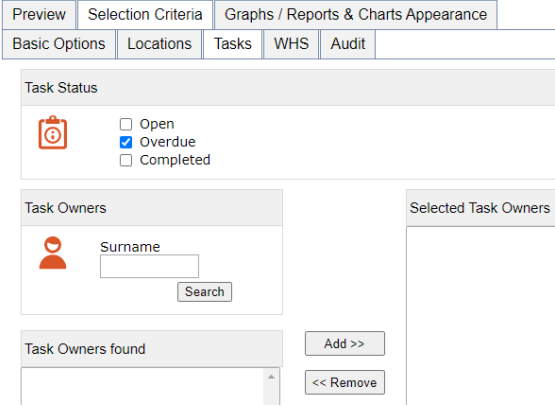
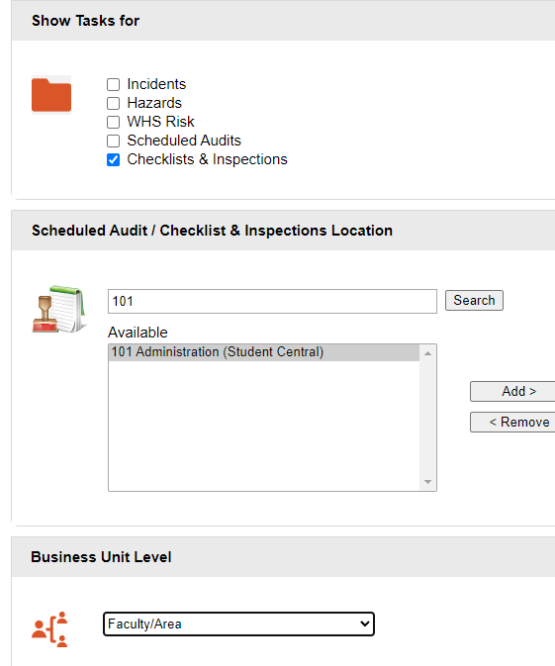
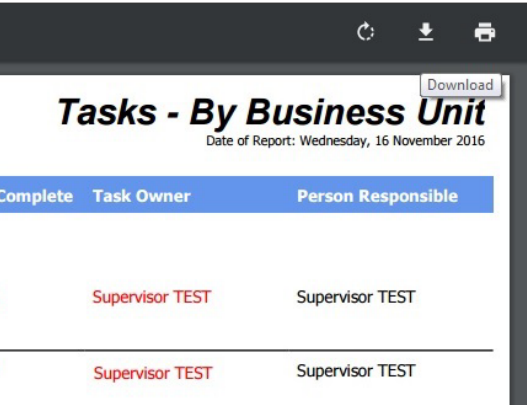
<p>8. Click on the <b>Tasks</b> tab</p> <p>9. Tick the “Open” and “Overdue” check boxes</p> <p><i>Optional</i></p> <p><b>10. Task Owners</b> To generate a report to see tasks assigned to a specific person/s, type the surname in the surname box to generate a search. The search results will appear in the Task Owners found box. Click <b>Add&gt;&gt;</b> to add the user to the Selected Task Owners section.</p>	
<p>11. Click on the “<b>preview</b>” tab</p> <p>12. <b>Under “Show Tasks for”</b> Click the checkboxes to view tasks for the relevant modules.</p> <p>13. <b>Business Unit Level:</b> select <b>Level 3</b> from the drop down list for results to be sorted by Faculty, or <b>level 4</b> for results to be sorted by School</p> <p>14. Click on the <b>Submit</b> button</p>	
<p>15. The screen will go to the <b>Preview</b> tab and the report will appear in a pdf format in the pdf viewer to download.</p> <p>16. Hover over the top right section of the report where a task bar will appear.</p> <p>17. Click on the download icon to download the pdf report.</p>	

Figure 5. Example: Overdue Tasks report

Curtin University		<b>Tasks - By Business Unit</b>				
Health and Safety		Date of Report: Tuesday, 25 February 2020				
Ref.	Type	Task Description	Due Date	% Complete	Task Owner	Person Responsible
<b>Health and Safety</b>						
69	Incident	Place barrier around the area	24/10/2016	15%	Dean Probert	David Russell
58	Incident	Training for parks and gardens staff to ensure they know which areas are higher risk and ensure that they are checking o them regularly	10/11/2016	100%	Natasha Downs	Natasha Downs
58	Incident	Area to be cleared regularly as determined by PFD	11/11/2016	80%	Natasha Downs	Natasha Downs
87	Incident	test 123	21/01/2017	100%	Chloe Hessel	Quinn Glasson
37	Incident	Update local policy	3/08/2017	100%	Chloe Hessel	Test Person
37	Incident	Update local policy	24/08/2017	100%	Chloe Hessel	Test Person
28	Audit	Warden to undergo warden training	30/03/2018	0%	David Croghan	Chloe Hessel
28	Audit	Warden to undergo warden training	31/03/2018	0%	Anne-Marie Bosch	Chloe Hessel
28	Audit	test action item	31/03/2018	0%	David Croghan	Chloe Hessel
33	Audit	AMB to buy trolley (test)	31/05/2018	0%	Anne-Marie Bosch	Chloe Hessel
35	Audit	Place request to have fire equipment tested and tagged.	31/05/2018	0%	Anne-Marie Bosch	Chloe Hessel
36	Audit	Properties to fix	31/05/2018	0%	Anne-Marie Bosch	Supervisor TEST