Safety 101 User Guide

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1. **101 Safety 101 Features**

Employees
1. Keep complete record of employee safety and training history in one place
2. Load employees individually or en masse via CSV importer

Mobile Inspection App
3. Build your own custom checklists (walk-around inspections, toolbox talks, hazard analysis, confined space entry permits, etc.)
4. Copy and modify checklists from template library
5. Schedule and track inspections --- daily, weekly, monthly and annual
6. Pause and restart inspections
7. Variety of question response types available with pencil whipping control
8. Document findings with notes and pictures
9. Identify problem areas by viewing list of failed questions across all checklists in worst to best order
10. Failed audit findings can be resolved or elevated to near miss or observed hazard for root cause analysis and corrective action
11. Share inspection results and resolve findings
12. Operate in off-line mode (no cell service)
13. Perform inspections on your mobile devices and your computer
14. Receive notification when a scheduled inspection is due, overdue or completed
15. Receive notification of only inspections which had one or more failed results
16. Track and analyze your inspections with 13 inspection reports
17. Mobile inspection app available for Apple and Android devices

Training Tracker
18. Generate training plan
19. Schedule courses, sign-up attendees, record attendance
20. Track employee experience level for each job qualification
21. Dashboard lists upcoming courses and team members with training that has expired or is set to set expire
22. Store all employees training history in one place and track source – on-the-job experience, classroom, LMS, etc.
23. Integrate with you LMS
24. Receive notification whenever a course is scheduled
25. Sign-up for weekly training summary
26. Group employees into work groups with associated job qualifications for easier training planning
27. Import employee job qualifications with start dates via CSV importer

Document Handler
28. Store all your documents in one place
29. Schedule periodic document reviews
30. Track document revision history
31. Share documents with employees via Employee Portal
32. Use document tags for easy document searching
Employee Portal
33. Provide you team with an easy way to share ideas and report hazards
34. Categorize employee submittals into groups (input types) you create
35. Mark employee input as resolved or elevate input to observed hazard or near miss
36. Facilitate a "good-catch" reward and recognition program
37. Access upcoming training course schedule
38. Supports OSHA guidelines for employee involvement
39. Available in Spanish and English
40. Receive e-mail notification when new employee safety input is submitted

Safety Manager
41. Capture observed hazards, near misses and injuries for all locations in one place
42. Track other incident types such as property damage, vehicle accident, chemical spill, etc. --- available Q4 2021
43. Promote consistent approach to incident investigations, root cause analysis and corrective action implementation
44. Perform root cause analysis (How did it happen? Why did it happen? What needs to be corrected? Root Cause?)
45. Capture witness report
46. Document corrective action (s)
47. Perform periodic audits to ensure once a corrective action is put in place, it stays in place
48. Require sign-off by designated corrective action auditor before a corrective action may be considered implemented
49. Receive e-mail notification when new incident is recorded, a corrective action is implemented or audit recorded
50. Sign-up for weekly safety activity summary
51. View work restrictions by supervisor with follow-up reminders
52. Record non-work injuries

OSHA
53. Generate OSHA 300 forms
54. "Incomplete" watermark / banner printed on incomplete 300 form printouts
55. Create 300A CSV that can be submitted to OSHA electronically
56. Import historic 301 incidents and 300 logs

Alerts & Reminders
57. Keep “safety things” from falling through the cracks with follow-up reminders and to-do lists
58. Sign-up for only those alerts & reminders you wish to receive
59. Manage your safety program with system generated organizational and individual user To-Do lists

Notifications
60. New incident recorded
61. Corrective action implemented
62. New audit recorded
63. New non-work injury recorded
64. New work restriction recorded
65. Work restriction follow-up recorded
66. Work restriction ended
67. New safety input submitted through employee portal
68. Summary of current to-do-list and overview of recent safety activity
69. Weekly training summary
70. Whenever a course is scheduled
71. Completed inspections for all inspections or only those with failed responses
72. Overdue inspections

Reports & Analytics
73. Safety activity reports
74. Lagging indicators
75. Leading indicators
76. Training reports
77. Inspection reports
78. OSHA 300 forms
79. Document handler reports
80. Add your logo to reports

Establishments and Establishment Groups
81. Establishments and establishment groups to group employees who work in a department, work location, state, region, business unit or any organizational grouping of employees you wish
82. Use establishments and groups to filter searches, control / limit user access
83. Target e-mail notifications users received

User Access
84. Control user access by setting their role within each feature --- training, checklist, safety manager, documents
85. Further define user authorization by selecting establishment or establishment groups a user may access

Filters and Tags
86. Sort and search records via a variety of filters such as establishment, work group, work shift, employee type, etc.
87. Use safety incident tags to group and search incidents by department, job title or any category you would like.

Your Data
88. Download your employee records, safety incidents, job qualification history and course attendance history anytime you wish

Security
89. Data stored on AWS servers located in the United States
90. Nightly backup of your data by AWS
91. Data is encrypted in transit using HTTPS
92. User passwords are encrypted and salted making them unknown to AWS and Safety 101
93. Optional logon security includes automatic logout due to user inactivity and account lockout after too many failed attempts

Pricing
94. $75 per month for 20 system users
95. Unlimited employees
96. Unlimited locations
97. Unlimited employee portal-only users
98. Includes all features
99. Web-based (no software to download or install)
100. Modern web browser support (Chrome, Microsoft Edge, Firefox, Safari)
101. 10 GB of data storage per account
2. Training

Identifies team members with training that has expired or is set to expire. Schedule courses, sign-up attendees, record attendance. Integrate with your LMS.

- **Connecting Employees, Work Groups, Job Qualifications, and Courses**
  A key part of the Safety 101 training feature involves the connection of employees to work groups, work groups to job qualifications (skills) and job qualifications to courses.

  These connections create relationships used by Safety 101 to determine which training courses each employee needs and when.

  Said another way, these connections enable Safety 101 to determine that this employee needs this skill and this course teaches this skill, therefore this employee needs this course.

- **Dashboard**
  The training dashboard lists team members with unmet job qualifications and job qualifications set to expire. The dashboard also provides a list of upcoming course sessions.

- **Employees**
  Here you can *add employees individually*, *assign employees to work groups* and *grant job qualifications* to an employee.

  The Show Detail feature provides a list of employees:
  - Required Job Qualifications
  - Up-To-Date Training
  - Expired Training
  - Work Groups the employee has been assigned to and
  - Course Sessions the employee has attended

  This feature also provides a printable report of the above employee information.

- **Work Groups**
  A work group is a group of employees with the same required job qualifications (skills).

  The purpose of a work group is to make it faster to assign job qualifications to an employees. When an employee is assigned to a work group, all job qualifications connected to that work group are automatically assigned to the employee.

  A work group is added by providing:
  - Work group name and description
  - Job qualifications required for the work group and

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1 To add employees en masse, see CSV Employee Import in Settings section of this guide.
• Employees belonging to the work group

The Show Details feature lists job qualifications required by a work group along with courses teaching each qualification and employees in that work group.

• **Job Qualifications**
  A job qualification is a skill, capability or certification required to perform a task.

Job qualifications may be external regulatory requirements such as forklift driver’s license or skills specific to your organization such as contract pricing.

A job qualification is added by providing:
  • Job Qualification Name
  • Months until job qualification expires or an indication that it never expires
  • Job qualification description
  • Employee experience level (see Track Employee Experience Level below)
  • Work groups that require this job qualification

**Track Employee Experience Level**

The Track Employee Experience Level option enables you to track proficiency differences among team members.

For example, one team member may be qualified to perform a specific task with supervision while another team member may be qualified to teach how to perform that task.

If track employee experience level is selected, you will have the option when granting a job qualification to an employee to also track the employee’s proficiency level.

There are four levels of proficiency:
  • Employee may perform task with supervision
  • Employee may perform task alone if a more experienced employee has prepared the workspace
  • Employee may set up and perform the task alone
  • Employee may train others in the performance of this task

• **Schedule a Course**

To schedule a course:
  • Select the course from the course catalogue list
  • Limit users allowed to view or update course session by selecting establishment (optional)
  • Specify start and end date and time of each classroom session (from / to)
  • Enter location where course will be held
  • Invite attendees from employee list or invite all employees from a work group, establishment, establishment group, employee type and/or work shift

The list of suggested attendees includes employees who have job qualification requirements taught by the course that are expired or about to expire.
• **Upcoming Courses**
  Upcoming Courses provides a list of all scheduled courses.

  The Show Details feature provides a summary of the selected course session along with an option to print an *attendance sign-up sheet*. Document course attendance by attaching the completed *attendance sign-up sheet* to the course session (see Record Attendance below).

• **Record Attendance**
  Recording attendance provides a training audit trail for each employee.

  Attendance may be recorded one person at a time or in bulk. To record in bulk, click “Select All Employees” and then un-invite any employee who did not attend.

  You can also grant attendees *job qualification(s)* taught by the course\(^2\). You can also record job experience / testing level\(^3\) when granting job qualifications\(^4\).

  Typically course session attendees will earn the same job qualification experience / proficiency level. However, to assign a different job qualification level to each attendee, simply record attendance one person at a time --- do not use the bulk attendance option.

• **Course History**
  Course history provides a list of all course sessions completed, when they were completed along with invitee and attendee counts.

  The Show Details feature provides a similar summary for the selected course session along with a list of those employees who were invited and those who attended. This is a great place to *attach the signed attendee sign-up sheet*.

  **Note:** To print an attendee list for a course session, go to Upcoming courses, click on Show Details for the course of interest (the print button is at bottom of page).

• **Course Catalogue**
  A course is added by providing:
  - Course name and description
  - Number of hours required to teach course
  - Job qualification provided by the course

  The Show Details feature provides history of when the course was taught along with a list of employees who were invited to the course and those who attended.

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\(^2\) Completion of a course does not necessarily mean an employee has met a job qualification. You may grant job qualifications taught by the course to employee(s) when recording attendance or at a later date from the Training Employees menu.

\(^3\) This feature only applies when the Track Employee Experience Level option was selected when the job qualification was created.

\(^4\) Select “Track Employee Experience Level” when adding or editing a Job Qualification.
• **Courses Needed**
  Review list of courses needed in next 90 days for employees with job qualifications that have expired or are set to expire along with a suggested attendee list.
3. Checklist

The Safety 101 mobile checklist / inspection app allows you to build custom checklists for:
- walk-around inspections,
- hazard assessments,
- toolbox talks,
- confined space entry permits,
- hot work permits,
- equipment checklists,
- preventative maintenance checklists,
- pre-tow inspections
- and more.

With the Safety 101 mobile inspection app, you can schedule inspections, document findings with pictures and notes, capture signatures of inspectors and toolbox talk attendees with date and time stamp and analyze results with a complete package of inspection reports.

Several e-mail notifications are available including notification upon completion of an inspection that includes a list of failed questions.

The app works in off-line mode when internet service is not available.

Audit Findings
Failed audit findings can either be marked as resolved or elevated to an observed hazard or near-miss for root cause analysis and correction action assignment.

Question Response Types
- **Pass / Fail Response Types:**
  - Pass / Fail
  - Whole number
  - Decimal number
  - Text
  - Date and time
  - Yes / No
  - No / Yes (see pencil whipping below)
  - Safe / Unsafe
  - OK / Needs attention
  - Compliant / Non-compliant

- **Non- Pass / Fail Response Types:**
  - Text
  - Date /time
  - Signature
  - Multiple select
Pencil Whipping
For the No/Yes label, a "No" response will count as passing and a "Yes" response will count as failing. However, these will appear on the checklist in the same order with "Yes" appearing first and "No" appearing second. The pencil whipping response type (No / Yes) helps ensure inspectors read each question carefully before responding.

- **Creating Checklist**

To create a checklist:
- Go to Checklist on homepage menu
- Select Checklists from side menu
- Click Add Checklist button

Data used to create checklist includes:
- Name of checklist (required)
- Description of checklist
- Instructions
- Default Pass / Fail labels (optional):
  - Pass / Fail
  - Yes / No
  - No / Yes
  - Safe / Unsafe
  - OK / Needs Attention
  - Compliant / Non-complaint

To build a checklist:
- Add Sections
- Add questions to each section

For each question, select one of the following response types:
- Pass / Fail
- Whole Number
- Decimal Number
- Text
- Date and time
- Signature
- Multiple select

- **Scheduling an Inspection**

With the Inspection Scheduler you can:
- Assign inspector(s)
- Select frequency of inspection (daily / weekly, monthly, yearly, no-repeat)
- Set date of first inspection
- Set timeframe inspection must be completed to be on time.
- Received notification when inspection is due, overdue and complete.
• Reports

Safety 101 provides the following reports for tracking and analyzing your inspections:

- Unresolved Findings
- Resolved Findings
- Failed Findings - One Inspection
- Failed Findings - Range of Inspections
- Print a checklist
- Inspections by Establishment - Number of Inspections Performed
- Inspections by Establishment - Pass/Fail Rate
- Inspections by Establishment - Resolution Time in Days
- Inspections by Inspector - Number of Inspections Performed
- Inspections by Inspector - Pass/Fail Rate
- Inspections by Inspector - Resolution Time in Days
- Questions for Review - Unanswered Questions
- Questions for Review - Failed Questions

• Downloading Mobile Inspection App:

From an iPad or iPhone:

- Go to [www.safety101.com](http://www.safety101.com)
- Click on Mobile Inspection App
- Click on App Store badge

Alternatively, go the App Store and search for “Inspector by Safety 101”

From an Android tablet or phone (Samsung, Google, LG, Motorola etc...):

- Go to [www.safety101.com](http://www.safety101.com)
- Click on Mobile Inspection App
- Click on App Store badge

Alternatively, go the Google Play Store and search for “Inspector by Safety 101”
4. Portal

Any employee can share safety ideas or report hazards through the Safety 101 Employee portal --- anonymously if desired. In either Spanish or English.

- **Unresolved Employee Input**
  After reviewing an employee input submitted through the portal, you can:
  - Mark input as resolved
  - Promote input to observed hazard
  - Promote input to near miss

- **Resolved Employee Input**
  With this feature you can review all “resolved” employee input.

  You can also change a “resolved” employee submittal back to an “unresolved” status or delete the employee portal submittal.

- **Settings**
  The system administrator can activate the employee portal with their username and password.

  Once activated, the system generates a direct log-in link that can be saved to an organizations intranet or web-browser allowing employees to log into the portal without a username or password.

  The portal can also be accessed via [https://kiosk.safety101.com](https://kiosk.safety101.com). Username and password are required.

  Within settings you will also be able to download a CSV of all employee portal input. This CSV provides support documentation for an employee incentive program.
5. Safety Manager

Promotes consistent approach to incident investigation, root cause analysis and corrective action implementation.

- **Add Safety Incident**

Four types of safety incidents can be captured:

- **Observed Hazard**
  A hazard that has been identified but has not yet caused injury.

- **Near Miss (No Injury)**
  An accident that did not result in serious injury, illness, or damage – but had the potential to do so. No one was hurt and first-aid was not administered.

- **Minor Injury**
  An accident where a person was hurt and first-aid may have been administered. Injury or illness was not serious enough to be logged as an OSHA recordable.

- **Serious Injury (OSHA Recordable)**
  A serious injury or illness that normally requires medical attention beyond first-aid. May have resulted in employee’s loss of consciousness, days away from work, restricted work, or transfer to another job.

- **View / Update All Incidents**

Here you can review and update all recorded incidents.

*Filters* are provided for selecting incidents for a specific establishment, establishment group and / or incident type (ex., observed hazards for main plant).

You can also create custom safety incident filters or “tags” (ex., job title, department, work shift). To create these “tags”, go to Safety Incident Tags on your Settings Menu (system admin user access level required).

View / Update All Incidents provides a *standardized process* for investigating an incident.

The 5 steps of this incident investigation process are:

1. Investigate root cause(s)
2. Record witness report(s)
3. Record corrective action(s)
4. Implement corrective action(s)
5. Audit corrective action(s)
• **Record Audit Findings**
  When a corrective action is implemented (see View / Update All Incidents) you have an option to have the corrective action periodically audited to ensure the correction action is effective. The results of these audits are recorded here.

• **Approve / Deny Corrective Action Implementation**
  This optional feature allows you to designate a third party “auditor” to approve corrective action implementations. This feature is for organizations wanting to separate the person (user) who implements the corrective action from the person (user) who approves the implementation.

  To activate this feature go to SETTINGS > ACCOUNT SETTINGS > CORRECTIVE ACTION SIGN OFF

• **Work Restrictions**
  A work restriction is added by providing:
  - Employee name
  - Restriction start date
  - Next follow-up date
  - Restriction description

  This feature allows you to filter work restrictions by supervisor and download a *daily supervisors work restriction report*.

  This feature also allows you to schedule a *follow-up review* by entering the date of the follow-up along with the findings. Here you have an option to:
  1) end the work restriction,
  2) specify a new / next follow-up date or
  3) leave the work restriction open with no follow-up date.

• **Non-Work Injuries**
  A non-work injury is added by providing:
  - Employee name
  - Date non-work injury occurred
  - Date non-work injury was reported
  - Who the non-work injury was reported to
  - Description of the non-work injury

• **Other Incident Type** (future add)
  - Property Damage
  - General Liability
  - Vehicle Accident
  - Chemical Spill

**Special Notes Regarding Employee Safety History Report**
An **employee safety history report** is provided in both Reports and Settings. These reports include all incidents, work restrictions and non-work injuries recorded.
6. OSHA 300 Forms (defaults to inactive)

- With Safety 101, you can create a **pdf of the following OSHA forms:**
  - OSHA Recordable Incidents – Form 301
  - Log Form 300
  - Summary Form 300A

- You can also create a **300A CSV** that can be **submitted to OSHA electronically.**

- Users interested in loading **historical OSHA data** may add:
  - Historic OSHA 301 Incident records
  - Historic OSHA 300 Log Line Item records
  - Historic OSHA 301 Incident Privacy Concern Case records

**Note:**
- This OSHA 300 Forms feature **defaults to inactivate** ---
- This feature will not appear on your homepage until your system administrator activates it.
- Your system administrator can activate this feature by going to the **Accounts Settings** menu item in **Settings.**

Creating and Printing OSHA Form 300A

With the new year comes the task of creating OSHA Form 300A and posting it from February 1 to April 30. Here are the steps for creating and printing this form in Safety 101.

The first step is for a user with ADMIN level authorization to enter the **average number of employees** and **total number of hours worked** in the previous for each of your establishments as follows:

1. Select **Settings** in the upper right hand corner of the Safety101 homepage.
2. Click **Establishments** from the side menu bar.
3. Select the establishment you want and click **Edit.**
4. Scroll down to **ANNUAL ESTABLISHMENT INFORMATION** and enter:
   - Average Number of Employees (for the year) (for the establishment)
   - Total Hours worked (for the establishment)
   - Organization size (from drop-down selection menu / NOTE: organization size is only required for CSV creation discussed below)
5. Repeat steps 1-4 for each of your establishments.
To print a copy of Form 300A in Safety 101:

1. Select OSHA 300 FORMS on the Safety 101 homepage.
2. Click Summary Form 300A from the side menu bar.
3. Verify the correct year is highlighted in BLACK below the screen title: “SUMMARY FORM 300A”.
4. Select the establishment you want and click Download 300A.
5. Review the report to confirm the word INCOMPLETE is not printed in large letters:
   - If the word "INCOMPLETE" appears, there is one (or more) pieces of missing information.
   - All data must be provided for each OSHA INCIDENT record, and the complete establishment information (i.e. establishment complete address, NAICS code, industry description), must be provided.
   - To help identify the missing information, go to the system TO DO which includes a section -- "Incomplete OSHA Recordable Incidents".
   - When Reviewing the OSHA Recordable Incident detail screen, the required fields are highlighted in yellow. Any missing information must be provided prior to printing a complete Incident 301 form, 300 Log form or 300 Summary Report.
6. Complete the Sign Here section in the lower right corner of the form after printing and before posting.

CREATING 300A CSV ELECTRONIC SUBMITTAL

To create a CSV for electronic submittal of your 300A to OSHA, you first need to verify that you have specified (in Safety 101) if your organization is a public sector entity (required for electronic submittal).

Here is how to do this in Safety 101:

1. Select Settings in the upper right hand corner of the Safety 101 homepage.
2. Click Account Settings from the side menu bar.
3. Enter one of the three possible responses to the question: "ARE YOU A PUBLIC SECTOR ENTITY?"
4. Click UPDATE ACCOUNT SETTINGS at the bottom of the screen.

Before attempting to create a CSV file, a 300A SUMMARY report should be created to confirm that the INCOMPLETE error message does not appear. There are not edits to check if data is missing before the file is created.

To create your 300A CSV:

1. Select OSHA 300 FORMS on the Safety 101 homepage.
2. Click OSHA Online Reporting 300A CSV from the side menu bar.
3. Verify the correct year is highlighted in BLACK Below the screen title: "DOWNLOAD 300A CSV FILE FOR OSHA INJURY TRACKING APPLICATION"
4. Select the establishment you want and click Download 300A CSV FILE
   A. If this is the first time you are submitting the CSV file click: "The first time you will submit the CSV"
   B. If this is an updated version of the file that you previously submitted click: "An updated version of a CSV file already submitted".

Please note that if you specify you are submitting an updated version of the CSV file OSHA will require you to give a reason for the revised CSV submission prior to clicking the green "Download 300A CSV File" button.
7. Reports

The Safety 101 report package includes over 40 reports with option to add your organizations logo to each. Filters such as establishment, date range, job qualification, etc. enable you to customize each report. Printable PDF and downloadable CSV are available for most reports.

Activity
- Incident Summary
- Activity Summary – Date Range
- Activity Summary – YTD
- To-Do List
- Employee Safety History

Lagging Indicators
- Annual Incident Rate and DART By Establishment
- Injury Rates By Establishment
- Injury Rate By Tag
- Incident Classification Breakdown
- Long-Term Trends By Establishment

Leading Indicators
- Worker Participation
- Management Leadership
- Hazard Identification & Assessment
- Hazard Prevention & Control
- Safety Program Evaluation
- Education & Training
- Observed Hazards Recorded
- Near Misses Recorded
- Corrective Actions Implemented

Training
- Job Qualification Matrix
- Course Attendance Matrix
- Training Grant Matrix
- Expired Training Report
- Training Hours By Employee

Inspection
- Inspection Activity
- Unresolved Findings
- Resolved Findings
- Failed Findings - One Inspection
- Failed Findings - Range of Inspections
- Print a checklist
- Inspections by Establishment - Number of Inspections Performed
- Inspections by Establishment - Pass/Fail Rate
- Inspections by Establishment - Resolution Time in Days
- Inspections by Inspector - Number of Inspections Performed
- Inspections by Inspector - Pass/Fail Rate
- Inspections by Inspector - Resolution Time in Days
- Questions for Review - Unanswered Questions
- Questions for Review - Failed Questions
In addition to reports listed above, the following reports are available within Safety 101:

- **Course session attendee list** (Training-Upcoming Courses-Show Details-Print Attendance List)
- **Incident Summary** (Safety Manager-View/Update All Incidents-Review/Update Detail-Download Summary)
- **Supervisor work restriction report** (Safety Manager-Work Restrictions-Download Report)
- **OSHA 300 Forms**
8. Document Handler (available July 2021)
9. To-Do Lists

The Safety 101 homepage To-Do feature provides both organizational and personal To-Do lists.

Items covered are:

**Organizational**

- Uncorrected Safety Incidents
- Unimplemented Corrective Actions
- Corrective Action Audits
- Incomplete OSHA Recordable Incidents
- Active Work Restrictions
- Work Restrictions Needing Follow-Up
- Unresolved Employee Input

**My To-Do List**

- Corrective Action Implementations Assigned To Me
- Corrective Action Audits Assigned To Me
- Pending Corrective Action Implementation Review
10. Resources

The Resources page, located on the top menu bar, is where you can go for helpful tools and tips.

1. Users Guide
2. Getting Started
3. 101 Features of Safety 101
4. FAQ
5. Data Security
6. Leading Indicator Video
11. Settings

(*) indicates system administrator user access level required

- **My Settings**
  With My Settings you can define your personal Safety 101 profile (e-mail address, password, name, and action item e-mail notifications).

- **Users (*)**
  Here is where system users are added and deactivated. It is also where individual user authorization levels are managed.

- **Employees (*)**
  This is where employees are added and deactivated. An employees record includes name, id #, address, supervisors name, employees job title, department, employee type, employee shift, birthdate, hire date, gender (for OSHA), phone # and direct reports (if any).

  Employees may be added to Safety 101 individually or in mass via the CSV Employee Importer discussed below.

- **Establishments and Establishment Groups (*)**
  Establishments and Establishment Groups can be used to group employees who work in a department, work location, state, region, business unit or any organizational grouping of employees you wish.

  • Establishments and Establishment Groups allow you to:
    1) Filter searches,
    2) Control / limit user access,
    3) Target e-mail notifications users receive.

  • An employee may belong to one or more Establishments or Establishment Groups.

- **Medical Facilities (*)**
  Medical facilities input is required for OSHA Form 301 and includes name and address of hospital, medical center, etc. used by your organization in the event of an emergency.

- **Safety Incident Tag (*)**
  These tags enable you to filter a subset of safety incident records from your complete list of safety incidents.

  This is useful, for example, if you want to view safety incidents or corrective action audits by department, job title or any other category you would like.
Your system administrator creates tags specifically for your organization. For example, a manufacturer may wish to create a tag to filter safety incidents by production equipment type such as brake, mill, saw, etc.

To do this, your system administrator would:
1. Add a Tag Label of “Equipment Type” then
2. Add Equipment Type Values of “Brake”, “Mill”, “Saw”, etc.

**CSV Employee Import (*)**

Employees can be added to Safety 101 individually or en masse by uploading a CSV file.

To upload a CSV file, export **selected fields (listed below)** from your employee database as a CSV, copy that data into a CSV formatted properly for Safety 101, and then upload the file.

You will need to make sure the column headers and formatting of the CSV you import match those in the example spreadsheet provided at the top of the CSV Employee Import page.

**Selected Fields required for OSHA Forms 301 and 300:**

1. First name (required for CSV)
2. Middle initial
3. Last name (required for CSV)
4. Employee ID (required for CSV)
5. Job title
6. Street address
7. City
8. State (upper case 2 character abbreviation – “MI” for Michigan)
9. Zip code
10. Birth date (mm/dd/yyyy)
11. Hire date (mm/dd/yyyy)
12. Phone number
13. Gender (“male” or “female”)

Note: *Only employee first name, last name and employee ID are required for Employee CSV Import.* The other data field can be added individually within the Safety 101 application.

**Account Settings (*)**

In Account Settings you are asked to provide:
- Your organizations name
- Your time zone
- If you would like to activate Safety 101’s OSHA Reporting feature
- If corrective action sign-off is required to record corrective action as implemented
- Enable inactivity logout
- Lock account after specified number of failed login attempts
- Display your organizations logo on Safety 101 reports
12. User Access Level

Safety 101 provides a hierarchy of access levels for each feature:

**System Administrator**

*Can read and update everything in the system:*

- Training
- Checklist
- Portal
- Safety Manager
- OSHA 300 Forms
- Reports
- Settings
- Privacy Concern Cases

*The System Administrator is the only user who may:*

- Invite new users
- Change existing user's authorization level
- Add establishments and establishment groups
- Create safety incident tags
- Update account settings

**Access Scoping (Limits a User To an Establishment Or Establishment Group)**

*Scoping is for all user levels below the Administrator user level*

**Safety Management And Portal**

*Full Access to All Incident Types*

*Can read and update everything related to safety incidents:*

- Safety Manager
  - Add / update incidents
  - Implement and audit corrective actions
  - Manage work restrictions and non-work related injuries
- Portal (review / resolve employee submissions)
- OSHA 300 Forms
- Reports

*Full Access to Minor Incident Types*

*Can read and update all incident types except serious injury (OSHA Recordable).*

Minor incident types include:
• Observed hazard
• Near miss
• Minor injury
• Other incident type

This user does not have access to:

• Employee Portal submittals
• OSHA forms
• Reports
• Privacy concern cases

Read Only Access to All Incident Types
Can read all incident data except:

• Employee portal submittals
• OSHA forms
• Privacy concern cases

Receives e-mail notifications to:

• Implement corrective action and record as implemented.
• Perform corrective action audit and document findings.

Implement Corrective Actions and Perform Audits
Receives e-mail notifications to:

• Implement corrective action and record as implemented.
• Perform corrective action audit and document findings.

This user does not have access to:

• Employee names
• Employee safety history
• OSHA reporting
• Non-work injuries
• Work restrictions
• Privacy concern cases

None
This user has no access to Safety Manager.

Training

Full Access to Training
This user has full access to Training Tracker. User may create, update and remove all training records.

- Add / update work groups and job qualifications
- Schedule course sessions
- Invite attendees
- Record attendance and grant job qualifications for course sessions
- Edit course session history

**Limited Access to Training**

*This user may:*

- Schedule course sessions and invite attendees
- Edit course sessions they schedule
- Record attendance for course sessions they schedule and for course sessions scheduled by others
- Grant job qualifications for any employee
- Read all training records

*This user may not:*

- Create or edit a course (Course Catalog)
- Configure work groups and job qualifications
- Remove job qualifications they did not grant

**Read Only Access to Training**

*This user has read-only access to Training. They can see all of your organization's training information but may not modify any training data.*

**None**

*This user has no access to Training.*

---

**Checklist**

**Full Access to Checklist**
This user may:

- Import checklists from the template library
- Create, update, and remove checklists
- Schedule and assign inspections
- View the results of all inspections
- Perform inspections using the Inspector 101 mobile app
- Resolve inspection findings
- Record new observed hazard or near miss based on inspection finding

Limited Access to Checklist

This user may:

- Schedule and assign inspections
- View the results of inspections
- Perform inspections using the Inspector 101 mobile app

Inspector

This user may:

Perform inspections using the Inspector 101 mobile app

None

This user has no access to Checklist.

Corrective Action Auditor

Auditor

This user will see all corrective action implementations that have been submitted for approval. They update such corrective actions to confirm that they have been implemented.

None

This user will not be allowed to mark a corrective action as implemented. They may submit a corrective action implementation for approval by an auditor, but they cannot confirm an implementation on their own.

13. Accounts

The Accounts page allows users with multiple Safety 101 accounts to switch from one account to another with a single click.
14. Safety 101 Data Security

What is the Safety 101 e-mail sending IP Address?
- The email sending IP address for Safety 101 is 167.89.77.152.
- To ensure e-mail notification deliverability from Safety 101 we recommend you “whitelist” this IP address.

**Do I access Safety 101 via the internet?**
Yes. Safety 101 runs under the “Software as a Service” model (i.e., SaaS)

**Data Storage**
The Safety 101 physical infrastructure is hosted and managed within Amazon’s secure data centers and utilizes Amazon Web Service (AWS) technology.

**Where is my data physically stored?**
Your data is stored on AWS servers located in the United States.

**How often is my data backed up?**
Nightly.

**How does Safety 101 back-up my data?**
Safety 101 uses Heroku’s standard backup solution that provides rollbacks to any point in time during the previous week.

**Is my data encrypted?**
- Your data is encrypted in transit using HTTPS
- Your user passwords are also encrypted and salted making them unknown to AWS and Safety 101.

**Which Internet Ports are required to access Safety 101?**
Ports 80 and 443

**Is the user login and password the only security, or is there a MFA or other system in place?**
User login and password is the only security, no MFA or other systems.

All user passwords are encrypted and salted.

**Does Safety 101 use single sign-on (SSO)?**
No.

**Who at Safety 101 has access to my data?**
- David Groulx, Safety 101’s CTO, is the only person at Safety 101 with access to your data. David is a founder and owner of Safety 101. He can be reached via e-mail at david@safety101.com or by phone at 616-403-8767.
- All Safety 101 employees are U.S. citizens.

**How do I get my data out of Safety 101?**
Safety 101 has a data export feature that allows you to download your safety incident data at anytime (see Other under REPORTS on the homepage menu bar).

**Does Safety 101 have API's?**
No.

**Is Safety 101 ITAR compliant (International Traffic in Arms Regulations)?**
Access to customer data is limited to U.S. citizens.

**What are logon security features?**
1. Lock login ability after X failed attempts (optional)
   - The number of failed login attempts will be displayed after each failed attempt.
   - Once the user reaches the number of failed attempts, set by the system administrator, the user will be required to wait for a period of time specified by system administrator before being able to attempt another login.
   - Example: after 6 failed login attempts user must wait 30 minutes to attempt another login.

2. Automatic logout due to inactivity (optional)
User is automatically logged out after specified period of time of inactivity has elapsed (inactivity time period set by system admin).

**15. Corrective Action Sign-Off**

Some organizations allow only authorized “corrective action auditors” to record a corrective action as implemented.
Safety 101 has the following optional feature to support “corrective action sign-off”:

**GETTING STARTED**

Step 1: Account Settings (Corrective Action Sign-Off Required?)

System administrator goes to Accounts Settings within Settings and sets “Corrective Action Sign-off Required?” to YES.

Note: The system defaults to a value of NO.

Step 2: Users (Corrective Action Auditor)

System administrator goes to Users within Settings and grants “Corrective Action Auditor” access level to new or existing system users who have been designated as the only individuals with the authority and responsibility to provide “corrective action sign-off”.

**PROCESS ---- When “Corrective Action Sign-off Required” is set to YES:**

**When corrective action has been implemented:**
1. User assigned to implement corrective action goes to their personal to-do list and marks corrective action as Ready for Implementation Audit.
2. System notifies all users with user access level of “Corrective Action Auditor” that corrective action is ready for audit. Notification is given via e-mail and personal to-do list.
3. Once satisfied that corrective action has been properly implemented, the corrective action auditor goes to their personal to-do list and marks the corrective action as implemented.

Note:
The process describe above is also followed in the event that a corrective action that was recorded as “implemented” is subsequently recorded as “non implemented”.

In this case, the user who created the corrective action, the person who implemented the corrective action and the “corrective action auditor” who signed-off on the corrective action all receive an e-mail notifying them that the status of the corrective action has been reversed and by whom.

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16. Getting Started

**System Set-Up**

**Step 1: Users**

- System Administrator adds Users and sets their access authorization
Step 2: My Account Settings
- Each user sets personal profile and selects e-mail notifications they would like to receive

Step 3: Establishments and Establishment Groups
- Aggregate employees around departments, work locations, regions, territories, subsidiaries, etc.
- Filter records, control user access, select e-mail notifications each user receives

Step 4: Employees
- Add individually
- Add en masse via CSV Import

Feature Set-Up

Step 5: Training Tracker
- Add Job Qualifications
- Add Work Groups and connect to Job Qualifications and Employees
- Add Courses and connect to Job Qualifications
- Add Training History individually or en masse via CSV import

Step 6: Safety Manager
- Select Account Settings
- Add Establishments
- Add Medical Facilities
- Add Safety Incident Tags

Step 7: Employee Portal
- Activate (system administrator only)
- Select employee access methods:
  - Company wide user name and password
  - Direct login link (no user name or password required)
  - QR Code

Step 8: Mobile Inspection App
- Create checklist(s)
- Download mobile inspection app from App store (“Inspector by Safety 101”)

Step 9: OSHA Forms
- Activate Optional OSHA 300 Forms Feature

1. Users
   (Settings > Users > Add User)

Add New User - only system administrators are authorized to add or update a user.

Data needed to add a user:
- E-mail address of new user
- Authorization level – select from the following options:

**System Administrator**

*Can read and update everything in the system:*

- Training
- Checklist
- Portal
- Safety Manager
- OSHA 300 Forms
- Reports
- Settings
- Privacy Concern Cases

*The System Administrator is the only user who may:*

- Invite new users
- Change existing user’s authorization level
- Add establishments and establishment groups
- Create safety incident tags
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**Access Scoping (Limits a User To an Establishment Or Establishment Group)**

*Scoping is for all user levels below the Administrator user level*

---

**Safety Management And Portal**

*Full Access to All Incident Types*

*Can read and update everything related to safety incidents:*

- Safety Manager
  - Add / update incidents
  - Implement and audit corrective actions
Manage work restrictions and non-work related injuries
  • Portal (review / resolve employee submissions)
  • OSHA 300 Forms
  • Reports

Full Access to Minor Incident Types
Can read and update all incident types except serious injury (OSHA Recordable).

Minor incident types include:
  • Observed hazard
  • Near miss
  • Minor injury
  • Other incident type

This user does not have access to:
  • Employee Portal submittals
  • OSHA forms
  • Reports
  • Privacy concern cases

Read Only Access to All Incident Types
Can read all incident data except:

  • Employee portal submittals
  • OSHA forms
  • Privacy concern cases

Receipts e-mail notifications to:
  • Implement corrective action and record as implemented.
  • Perform corrective action audit and document findings.

Implement Corrective Actions and Perform Audits
Receipts e-mail notifications to:
  • Implement corrective action and record as implemented.
  • Perform corrective action audit and document findings.

This user does not have access to:
  • Employee names
  • Employee safety history
- OSHA reporting
- Non-work injuries
- Work restrictions
- Privacy concern cases

None
This user has no access to Safety Manager.

Training
Full Access to Training
This user has full access to Training Tracker. User may create, update and remove all training records.

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- Grant job qualifications for any employee
- Read all training records

This user may not:

- Create or edit a course (Course Catalog)
- Configure work groups and job qualifications
- Remove job qualifications they did not grant

Read Only Access to Training
This user has read-only access to Training. They can see all of your organization's training information but may not modify any training data.

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This user may:

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- Perform inspections using the Inspector 101 mobile app
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• Record new observed hazard or near miss based on inspection finding

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*This user may:*

• Schedule and assign inspections
• View the results of inspections
• Perform inspections using the Inspector 101 mobile app

**Inspector**

*This user may:*

Perform inspections using the Inspector 101 mobile app

None

*This user has no access to Checklist.*

**Corrective Action Auditor**

**Auditor**

This user will see all corrective action implementations that have been submitted for approval. They update such corrective actions to confirm that they have been implemented.

None

This user will not be allowed to mark a corrective action as implemented. They may submit a corrective action implementation for approval by an auditor, but they cannot confirm an implementation on their own.

---

**2. My Account Settings**

*(Settings > My Settings)*

Once a user is added the next step is for that user to update their personal profile (click on Settings in upper right hand corner of home page).

Here they can:

• Change their e-mail address
• Create / change their password
• Add the name they would like to be referred to in system
• Select (subscribe) to one or more of the following system generated e-mail notifications based on users access level:
System Administrator:
- Incidents
- Non-Work Injuries
- Work Restriction
- Portal
- Safety Summary Reminder
- Training Notifications

Safety Leader:
- Incidents
- Non-Work Injuries
- Work Restriction
- Portal
- Safety Summary Reminder

Safety Team Member:
- Incidents
- Non-Work Injuries
- Work Restriction
- Portal
- Safety Summary Reminder

Safety Support:
- No e-mail notifications

Training Leader:
- Training Notifications

Training Team Member:
- Training Notifications

Corrective Action Auditor:
- No e-mail notifications

Inspection Leader:
- Inspection completion notification

Inspection Team Member:
- Inspection completion notification

Inspector:
- No e-mail notification

3. Establishments & Establishment Groups
(Settings > Establishments / Establishment Group)

Establishments and Establishment Groups can be used to group employees who work in a department, work location, state, region, business unit or any organizational grouping of employees you wish.

Establishments and Establishment Groups allow you to:
1) Filter searches,
2) Control / limit user access,
3) Target e-mail notifications users receive.

Use establishments and establishment groups:
• Group physical work locations for printing OSHA 300 forms (Step 1)
• Filter reports, safety incidents, inspections, employee portal submittals by job site, region, etc. (Step 1)
• Schedule training by department, work location, etc. (Steps 1 & 2)
• Control user access and the e-mail notifications they receive (Steps 1, 2 and 3)

Data needed to add an Establishment:
• Establishment name
• Address (street, city, state, zip code)
• NAICS code
• Your industry description
• Employees belonging to this establishment
• Electronic 300A Submittal Setting
  • If your organization is in the public sector (required for OSHA reporting)
  • Employer Identification Number (EIN)

An Establishment Group is a collection of establishments.

Data needed to add an Establishment Group:
• Establishment Group name
• Establishment Group description
• Establishments in the Establishment Group

(Note: An employee may belong to one or more establishments or establishment groups).

3. Establishments & Establishment Groups (continued)

Step 1: Add Establishments and Establishment Groups
• Select Establishments from Settings Menu
  • Add establishments (work locations, departments, etc.)

• Select Establishment Groups from Settings Menu
  • Add establishment groups by selecting establishments belonging to each group (region, subsidiary, etc.)

Completion of Step 1 allows you to:
1) group physical work locations for printing OSHA 300 forms &
2) filter reports, safety incidents, inspections, employee portal submittals by department, region, etc.

Step 2. Connect Employees to Establishments (group employees)
• Assign employees to establishments when:
  • Adding an establishment (Step 1 above) or
• Adding a new employee (Settings > Employees > Add Employee) or
• Updating existing employee (Settings > Employees > Show / Edit)

Completion of Steps 1 and 2 allow you to group employees for scheduling training and inviting course attendees.

Step 3. Connect Users to Establishments (control user access and e-mail notifications)

• Go to Settings and select User then Manage Access
• Select (assign) either an Establishment or an Establishment Group

  o A user can be assigned to one establishment or one establishment group (not both and not more than one)

  o To assign a user access to multiple establishments, create an establishment group made up of establishments you want the user to access, then assign that establishment group to the user.

  o A user **assigned** to an establishment or establishment group (My Organization):
    ▪ Will only receive e-mail notifications linked to that establishment or establishment group.
    ▪ Will have access to records linked to that establishment or establishment group.
    ▪ Will have access to records not linked to any establishment or establishment group.
    ▪ Will **not** have access to records linked to other establishments or establishment groups.

  o A user **not assigned** to any establishment or establishment group will have access to all establishments and groups and all employees (Entire Organization)

  o When **scheduling a course**, a user assigned to an establishment or establishment group may invite employees assigned to the same establishment or group as the user. The user may also invite employees who have not been assigned to any establishment (a.k.a., un-assigned).

  o A user may **view** work restrictions for **all** employees reporting to a supervisor if the supervisor is assigned to the same establishment as the user --- even if some employees are not assigned to that establishment. However, a user may **edit** work restrictions for only those employees scoped to them.

  o Establishment user access control does not apply to:
    ➢ System Administrators--- admins can access everything.
    ➢ Corrective action implementation --- implementation of a corrective action can be assigned to any user authorized to implement corrective actions.

Completion of Steps 1, 2 & 3 allows you to limit the employees a user can access and the e-mail notifications they receive.

Step 4. Employees
(Settings > Employees)

Employees can be added individually or en masse via CSV import.

Adding Employees Individually

Data needed to add an individual employee:

- First name (**required**)
- Middle Name
- Last Name (**required**)
- Employee ID Number
- Address (street, city, state, zip)
- Supervisor name (select from drop down menu)
- Job Title
- Department
- Employee Type
- Employee Shift
- Birth Date
- Hire Date
- Gender
- Phone Number
- Email address
- Establishment (work location)
- Attachments

Adding Employees en masse via CSV import
(SETTINGS > CSV IMPORT > EMPLOYEES)

Employees can also be added (and updated) en masse via a CSV import. Instructions for this approach can be found by clicking SETTINGS located in the upper right hand corner of the main menu then selecting the CSV Import menu item and the blue Employees link.

Step 5: Training Tracker

1. Add Job Qualifications
   (TRAINING > JOB QUALIFICATIONS > ADD JOB QUALIFICATION)

   - A job qualification is a skill, capability or certification required to perform a task.
   - Job qualifications may be external regulatory requirements such as a forklift driver’s license or skills specific to your organization such as contract pricing.
   - A job qualification can be assigned to one or more work groups.

Data needed to add a job qualification:
- Job qualification name (required)
- Months until job qualification expires or click box to indicate job qualification never expires (required)
- Description of job qualification (optional)
Click box to track employee job qualification experience level (optional).
Experience level options include:
1. Employee may perform task with supervision
2. Employee may perform task alone if a more experience employee has prepared the workspace
3. Employee may set up and perform task alone
4. Employee may train others in the performance of this task

Tracking an employee’s experience level helps an organization find and select team members with the right skills for the job.

Work groups that require this job qualification
*** This connection cannot be made until work groups are added. Which is the next step below.

2. Add Work Groups and Connect to Job Qualifications and Employees
   (TRAINING > WORK GROUPS > ADD WORK GROUP)

A work group is a collection of employees with the same job qualifications (ex., mechanics).

An employee can be assigned to one or more work groups.

When an employee is assigned to a work group, all job qualifications assigned to that work group are automatically assigned to the employee.

Data needed to add a work group:
1. Work group name (required)
2. Description of work group (optional)
3. Job qualifications required for this work group --- connect work group to job qualifications (required)
4. Employees belonging to this work group --- connect work group to employees (required)

Note: Steps 3 and 4 indirectly connects job qualifications to employees.

Step 5: Training Tracker (continued)

3. Add Courses and Connect to Job Qualifications
   (TRAINING > COURSE CATALOG > ADD COURSE)

Data needed to add a course:
• Course name (required)
• Course length in hours and minutes (required)
• Course Description (optional)
• Job qualifications taught by this course --- connect course to job qualifications (optional)

Safety 101 creates a training plan for the organization and for each employee by matching job qualifications needed by each employee to the job qualifications taught by each course.
4. Add Training History

Training history for an employee can be added individually or en masse via CSV import.

**Individually**
*(TRAINING > EMPLOYEES > GRANT QUALIFICATION)*

To add training history for an individual employee, click on the EMPLOYEES menu item in TRAINING. There you will find a list of employees. Once you identify the employee to be updated, click on the blue **Grant Qualification** link located to the right of the person's name.

Data needed to add training history:
- Job qualification to be granted (select from menu of job qualifications previously loaded) (required)
- Date person became qualified (START DATE) (required)
- Select source of job qualification from one of these values (optional):
  - Classroom
  - Computer Based Training
  - On-The-Job
  - Test or Exam
  - Performance Evaluation
  - Previous Employer
  - Required Retraining
  - Other
- Notes (optional)
- Attachments such as a certificate or evaluation (optional)

**En masse via CSV import**
*(SETTINGS > CSV IMPORT > TRAINING RECORD)*

Training history can be loaded (and updated) en masse via a CSV import. Instructions for this approach can be found by clicking SETTINGS located in the upper right hand corner of the main menu then selecting the CSV Import menu item and the blue **Job Qualification Start Dates** link.

**Step 6: Safety Manager**

To set-up Safety Manager, click Settings located in the upper right hand corner of main menu. Here you will add information via the following menu items:
- Account Settings
- Establishments
- Medical Facility
- Safety Incident Tags

**Account Settings**
Data needed for account settings:
- Organization / company name (required)
- Time Zone
- Activate OSHA Reporting
- Activate Corrective Action Sign Off
Establishments
Data needed to add establishments:
  • Establishment name (required)
  • Address (street, city, state, zip)
  • NAICS Code
  • Industry description (required for OSHA reporting)
  • Are You a Public Sector Entity (required for OSHA reporting)
  • Employer ID Number (required for OSHA reporting)

Medical Facilities
Data needed to add medical facilities:
  • Medical facility name (required)
  • Address (street, city, state, zip)

Safety Incident Tags
Tags allow you to select only the records you would like to see. For example, use tags to select corrective action audits for a given department or serious injuries by job title. A manufacturer may want to use tags to track safety incidents by equipment type.

Data needed to add safety incident tags:
  • Tag label
  • Tag value

Step 7: Employee Portal
(Portal > Portal Settings)

The employee portal can be accessed via a:
  • Login link, (requires an organization wide username and password)
  • Direct link (this is a token link that does not require organization wide username and password)
  • QR code

To get started:
  • Click on Portal Settings from the PORTAL side menu
  • Enter organization-wide username and password
  • Click on “Start Using Portal” button

This will activate the portal and take you to the Portal Settings page with Set-Up options and directions.
  • Settings
The system administrator can activate the employee portal with their username and password.

Once activated, the system generates a direct log-in link that can be saved to an organization's intranet or web-browser allowing employees to log into the portal without a username or password.

The portal can also be accessed via https://portalsafety101.com. Username and password are required.

Within settings you will also be able to download a CSV of all employee portal input. This CSV provides support documentation for an employee incentive program.

Step 8: Mobile Inspection App

The Safety 101 mobile inspection app allows you to build custom checklists for:

- walk-around inspections,
- hazard assessments,
- toolbox talks,
- confined space entry permits,
- hot work permits,
- equipment checklists,
- preventative maintenance checklists,
- pre-tow inspections
- and more.

The app works in off-line mode when internet service is not available. With the Safety 101 mobile inspection app, users can document findings with pictures and notes, capture signatures of
inspectors and toolbox talk attendees with date and time stamp. E-mail notifications are provided upon completion of an inspection that includes a list of failed questions.

**Audit Findings**
Failed audit findings can either be marked as resolved or elevated to an observed hazard or near miss for root cause analysis and correction action assignment.

**Question Response Types**
The following question response types will be recorded as pass or fail
- Pass / Fail
- Whole number
- Decimal number

While the following response types are not recorded as pass or fail:
- Text
- Date /time
- Signature
- Multiple select

**Pencil Whipping**
For the No/Yes label, a "No" response will count as passing and a "Yes" response will count as failing. However, these will appear on the checklist in the same order with "Yes" appearing first and "No" appearing second. The intent of this type of label is to allow the checklist designer to catch inspectors "pencil whipping" to fill out inspections without paying attention.

**Create checklist(s)**

To create a checklist:
- Go to **Checklist** on homepage menu
- Select **Checklists** from side menu
- Click **Add Checklist** button

Data used to create checklist includes:
- Name of checklist (required)
- Description of checklist
- Instructions
- Default Pass / Fail labels (optional):
  - Pass / Fail
  - Yes / No
  - No / Yes
  - Safe / Unsafe
  - OK / Needs Attention
• Compliant / Non-compliant

To build a checklist:
• Add Sections
• Add questions to each section

For each question, select one of the following response types:
• Pass / Fail
• Whole Number
• Decimal Number
• Text
• Date and time
• Signature
• Multiple select

• Download mobile inspection app from Apple App Store

From an iPad or iPhone:
• Go to www.safety101.com
• Click on Mobile Inspection App
• Click on App Store badge

• Inspection Reports

Safety 101 provides the following reports to allow you to track and analyze your inspections:
• Unresolved Findings
• Resolved Findings
• Failed Findings - One Inspection
• Failed Findings - Range of Inspections
• Print a checklist
• Inspections by Establishment - Number of Inspections Performed
• Inspections by Establishment - Pass/Fail Rate
• Inspections by Establishment - Resolution Time in Days
• Inspections by Inspector - Number of Inspections Performed
• Inspections by Inspector - Pass/Fail Rate
• Inspections by Inspector - Resolution Time in Days
• Questions for Review - Unanswered Questions
• Questions for Review - Failed Questions
Step 9: OSHA 300 Forms

- The Safety 101 OSHA 300 Forms feature defaults to inactivate --- it will not appear on your homepage until your system administrator activates it.

- Activate this feature by going to the Accounts Settings menu item in Settings.

  - With Safety 101, you can create a pdf of the following OSHA 300 forms:
    - OSHA Recordable Incidents – Form 301
    - Log Form 300
    - Summary Form 300A

  - You can also create a 300A CSV that can be submitted to OSHA electronically.

  - Users interested in loading historical OSHA data may add:
    - Historic OSHA 301 Incident records
• Historic OSHA 300 Log Line Item records
• Historic OSHA 301 Incident Privacy Concern Case records