



# INCIDENTS, INVESTIGATIONS & ANALYTICS

Training Guide



# Incident Reporting & Investigations System

Safety Evolution provides you with a guided and easy-to-use investigation system that starts by collecting event data from the field, notifying the team, and providing you with the tools to complete your industry-leading investigation.



Worker View

# Objectives

» By the end of this training guide, you will have an understanding of:

1

## The Initial Report

Workers can report incidents and near misses 24/7

2

## Assessment & Investigation

Review, Assign and Update the Investigation

3

## Use Analytics To Guide Your Safety Initiatives

Data is collected and uploaded into your Microsoft PowerBI Dashboard for Analysis



# The Initial Report

1

The Initial Report

» Workers can report incidents and near misses 24/7.

The image shows three smartphones displaying the incident reporting app interface. The leftmost phone shows the initial form with fields for Site (Main Office), Location (1099 MacDonald Road), Date & Time (2022-10-24 09:09 AM), and several yes/no questions about injuries, damages, and witnesses. The middle phone shows a 'Finalize' button and sections for 'Potential Injuries', 'Damages', 'Environmental Damage', and 'First Hand Account'. The rightmost phone shows the 'First Hand Account' section with questions like 'What were you doing at the time?', 'Were you directly involved in the event?', 'Where did this happen?', 'How many people were present?', 'What happened first?', 'When did this happen?', and 'What was involved? (Equipment, Weather, etc)'. The interface is clean and user-friendly, with clear labels and input fields.

- Workers are guided as they complete their event report by interview-style questions.
- As they toggle on answers to questions such as "were there any witnesses?" more in-depth questions are asked to ensure a full report.
- Incident Reporters can capture **date, time, location, witness statements, property damage, environmental damage, weather factors, work permits, scene changes**, and more.
- **Link Injuries** to the body part(s) and **upload** relevant **photos** and **documents**.

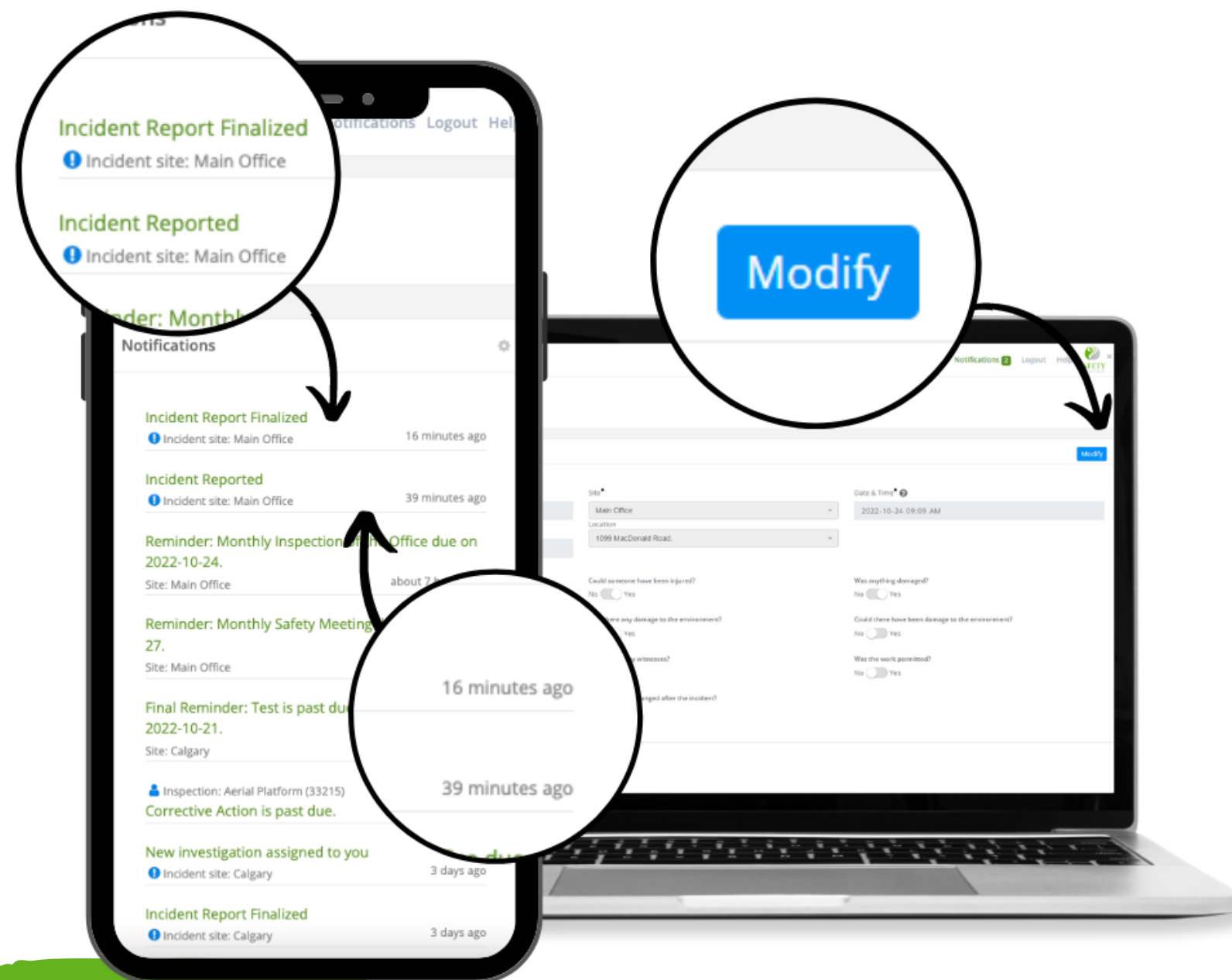


# The Initial Report

1

The Initial Report

» Instant incident notification to HSE Managers.



- From the moment an Incident Report is started, an **Early Incident Notification** goes out to the Manager(s) of whom you want to be notified.
- Managers can **view the report in real-time** as it is being filled out and Modify it for more details after.
- Eliminate Witness statements that are incomplete and require hours of follow-up and interviews



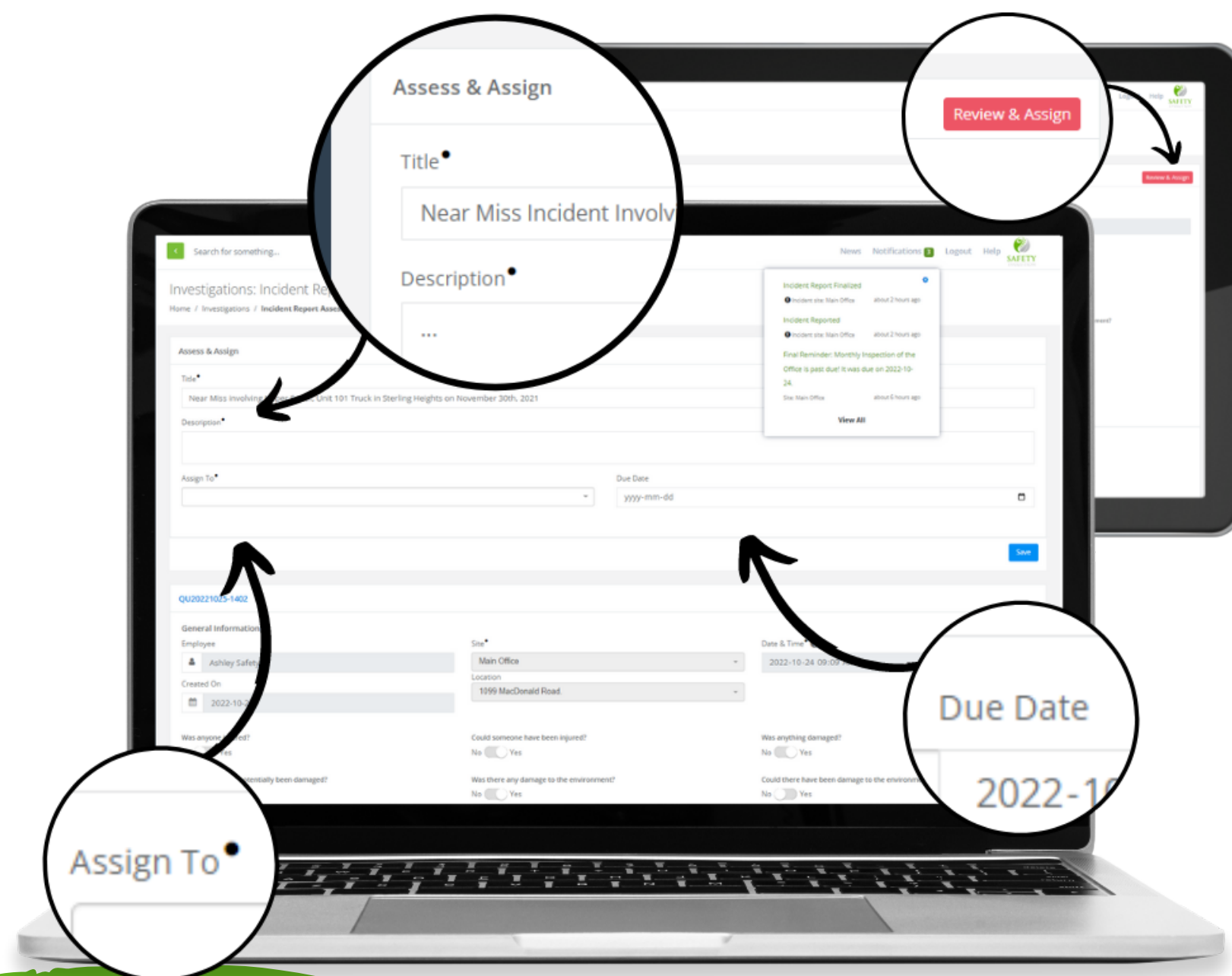
# Assessment & Investigation

2

Assessment & Investigation

» Instantly review Incident Reports and assign Investigations to management.

- Incident Reports are handed in with all critical information from the field.
- Managers can **review** the incident report and **assign** it to an investigator with **due dates**, a **title**, and a **description** for searchability down the road.
- From this moment on, everything for the investigation is gathered in one place and updates are tracked in the **change log**.

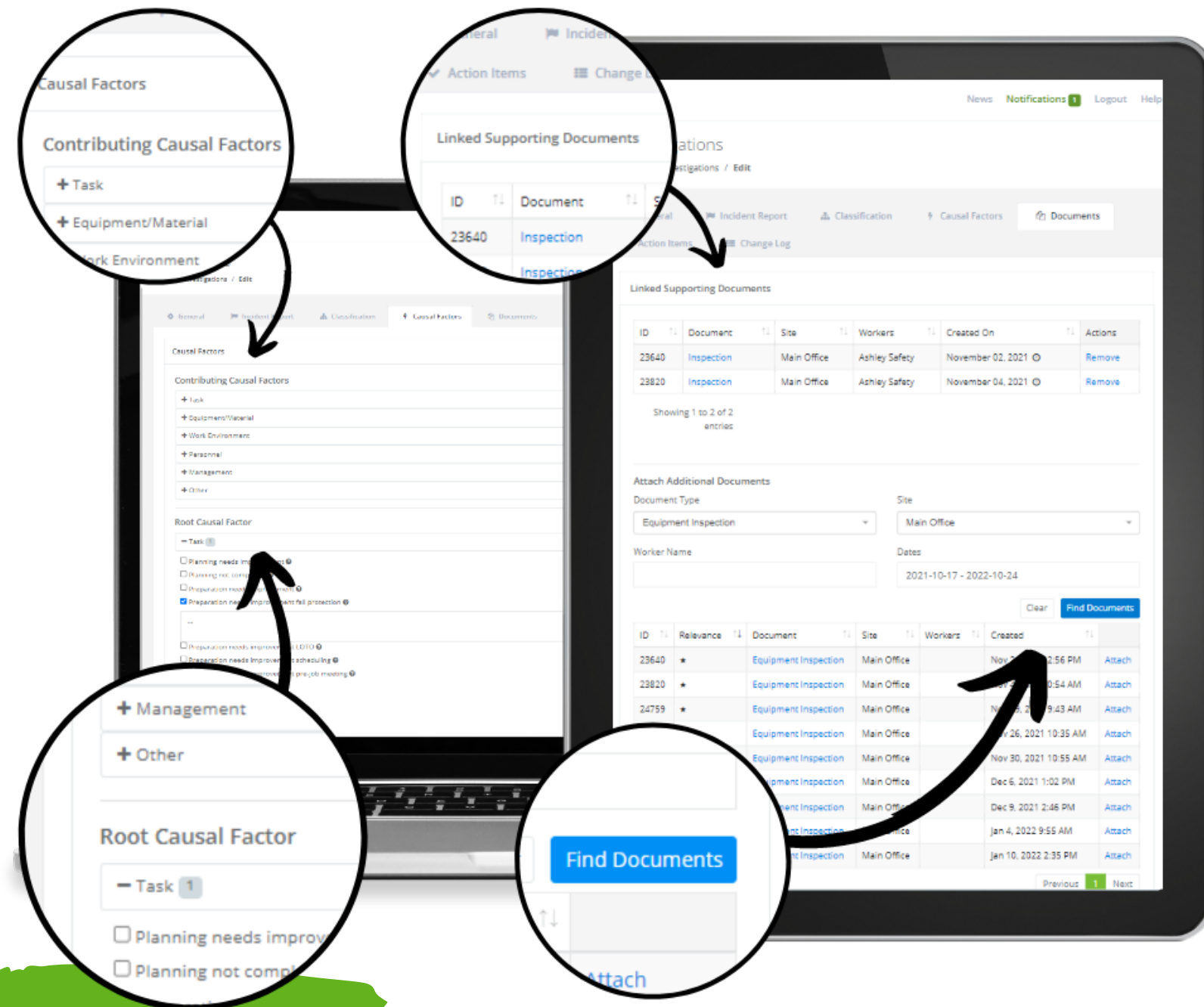


# Assessment & Investigation

2

Assessment & Investigation

» Drill down to the Root Cause through the Investigation Tool.

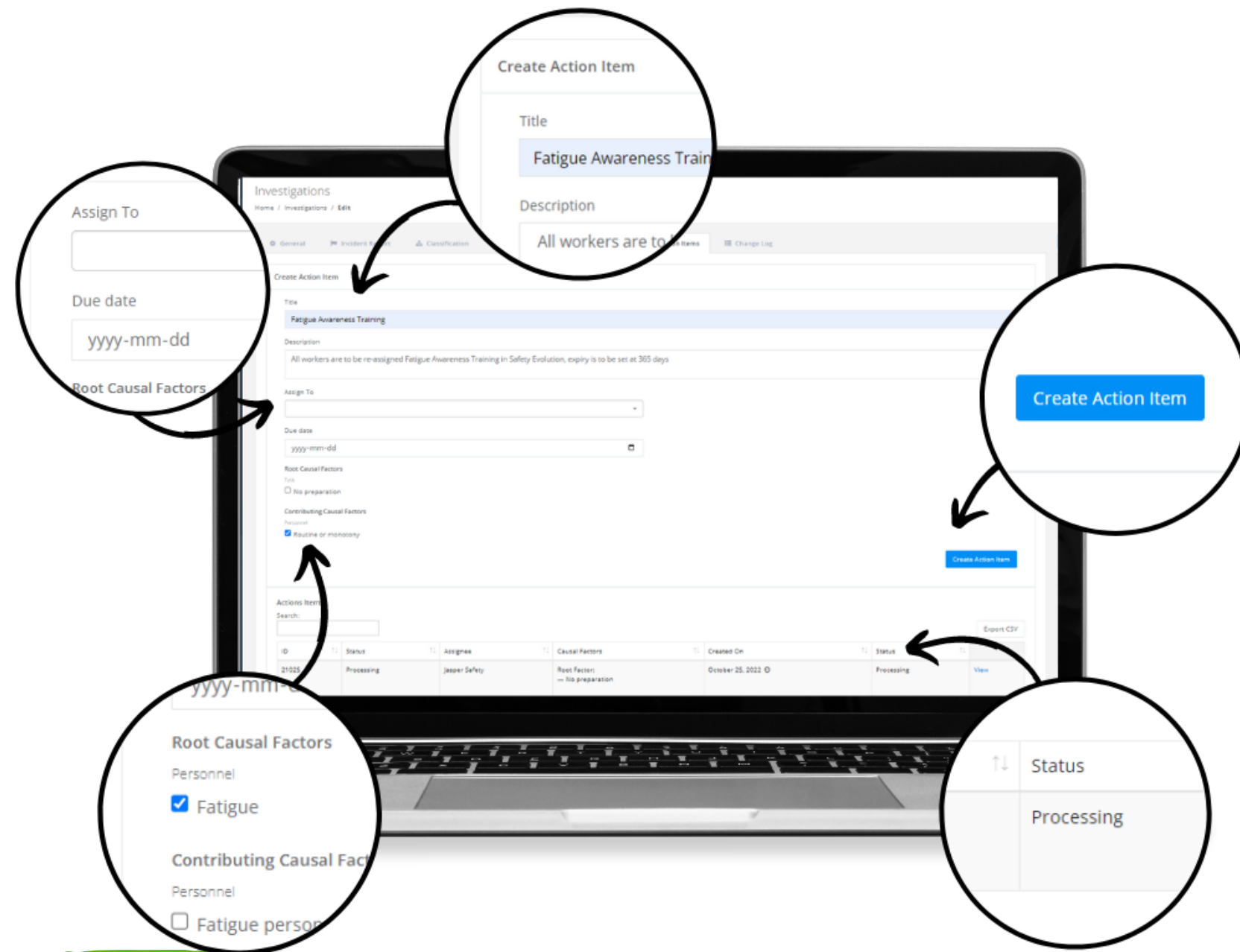


- The Investigator can start their investigation by narrowing down the **contact type** and measuring the **potential and actual risk**.
- Add **primary and secondary classification** types and document event details.
- Drill down with our checklist of 100+ **contributing and root causal factors**.
- Best of all, **link supporting documents** from the system that are associated with the incident or **upload** more information that becomes available (witness statements, doctor's reports, OSHA correspondence).



# Assessment & Investigation

» Create, track and assign Action Items in minutes.



- Take your Causal Factors and turn them into **Action Items** for your team.
- Create **titles, descriptions, and due dates** for each action item and **assign** them for completion.
- Easily **track progress** from within the Investigation tool as updates happen.
- For those long-term Action Items, never lose sight of these with **Notifications** of past due





# Use Analytics To Guide Your Safety Initiatives

3

Use Analytics To Guide Your Safety Initiatives

» Your incident and investigation data produces Microsoft Power BI Analytics.



- Time for the best part...your incident & investigation data is automatically compiled into **Analytics** that is collected in your **Microsoft PowerBi**-driven dashboard.
- Giving your company the power to drill down to understand the trends and get ahead of the next event.
- Microsoft PowerBi Dashboards include **Incident Overview**, **Injury Details**, **Incident Details**, **Causal Factors**, **Event Trending**, and **Incident KPI Report**.



# Use Analytics To Guide Your Safety Initiatives

3

Use Analytics To Guide Your Safety Initiatives

» Your TRIF/TRIR & LTIF are calculated and updated daily.

- By using the Investigation tool, your company's **total recordable incident frequency / total recordable incident rate** and **lost time injury frequency rate** will always be available.
- Drill down on appropriate rolling averages to evaluate performance after the launch of a safety initiative, leadership change, etc.

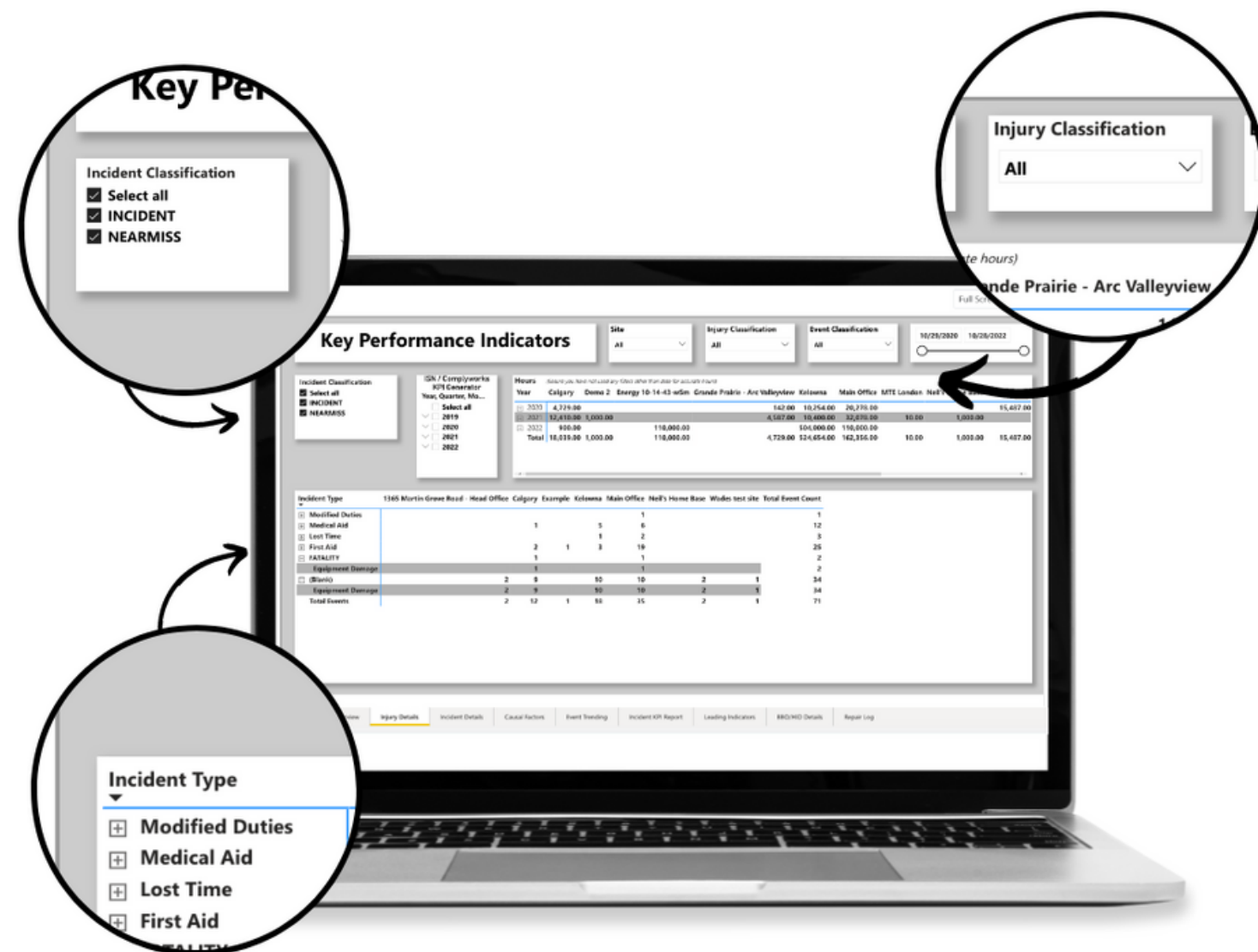


# Use Analytics To Guide Your Safety Initiatives

3

Use Analytics To Guide Your Safety Initiatives

➤ Safety KPIs are compiled and available in your Microsoft PowerBI Dashboard.



- Contractor management **KPIs** are always up to date and ready to be entered into your contractor management portals.
- **Filter** by year, quarter, client, incident type, and event classification. No matter what key performance indicator they require, you have the data.



# Training Checklist

» 15 Powerful Features To Assist Your Incidents & Investigations.



- Access & Reporting
- Early Incident Notification
- Title & Description for Searchability
- Assign Investigator
- Change Log
- Contact Type
- Classification
- Causal Factors
- Link Support Documents
- Action Items
- Live Summary Report
- Microsoft PowerBi Analytics
- TRIF
- LTIF
- ISN / ComplyWorks / Avetta KPIs



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[support@safetyevolution.com](mailto:support@safetyevolution.com)