Safety Documents

Sample OHS Policy Statement

Legal Requirements for Safety Documents

In carrying out health and safety obligations, an employer must be able to ensure **consistency** of processes and record keeping, so that there is a reasonable level of system predictability and repeatability

It is also difficult to defend enforcement enquiries and prosecutions in the absence of documented procedures and records

Health and safety documents can be procedures, templates, codes of practice, directives, plans and a range of similar instructions or records

SafetyBase is, in itself, a documented health and safety system with a database, generic health and safety procedures (the ones you are now reading) and prompts in terms of both data entry fields and the generation of suggested tasks, including "how to" explanations for completing the task

SafetyBase also permits you to create your own procedures using template files, for example, Local Reporting Rules, Hazard Analysis and others

Procedure for adding Safety Documents

The first and most fundamental documents in the health and safety system are:

Health and Safety Manual

Health and Safety Policy Statement

The **Manual** is effectively represented by this electronic information, which is available within SafetyBase

A Policy Statement is *recommended*, typically as a one page display that is dated and signed by a senior manager. (Sample wording for a Health and Safety Policy Statement can be found under Help/Health and Safety Procedures Manual/Documents). It's the blue link at the top of the page

The Policy should state clearly the general intent in terms of *consultation with employees, management responsibilities, employee responsibilities, compliance with relevant legislation and standards (including statutory reporting), provision of rehabilitation opportunities, ongoing programme development and education of all personnel*

The **Policy Statement** and **Manual** (or equivalent) must be readily available to all employees

Other health and safety related documents may include external paper documents. In those cases, you should ensure those external documents are controlled, to ensure the most current document is used in conjunction with your health and safety management system. The following steps are recommended:

The senior person to whom the main health & safety coordinator reports shall be the Document Controller, unless an existing procedure applies (such as a quality system)

Amendments or proposed amendments to both online health & safety documents and external documents should be drafted as a paper document and authorised with signature and date by the Document Controller

Updated documents will be made available, either as soft copies or hard copies, to all users

Copies of external documents will be uploaded to a Document file in SafetyBase, with a current date on both the document itself and in the file description in SafetyBase.

Previous versions of external documents stored in SafetyBase will have their Status changed to "Withdrawn" and the file archived to prevent its use as a current document

How to add Safety Documents

Open a **Safety Documents** file under the **Documents** heading. SafetyBase prompts you to identify the document

If you have advanced versions of SafetyBase, they prompt further identification, authorisation and control of the document

Using Tasks while adding Safety Documents

Tasks can be notifications, instructions, alerts or corrective actions associated with a particular file. You can add Tasks as you go during data entry, using the inline **New Task** button in your screen. You can also use the Toolbar at the bottom of your screen during data input, or the **Tasks** tab after you submit the file

As you create a file, SafetyBase may automatically set suggested Tasks, depending on some of your droplist selections. Watch for inline informational messages, which are there to alert you if a droplist might create an automatic Task

Please note that although these automatic Tasks may be created as helpful prompts, they do have generic wording, so you have the choice of creating Tasks yourself. This is advisable if you prefer the wording to be specific or personal. If appropriate, you can select the **"Recurring"** button, which lets you create a repeating schedule, (say, an inspection, review or check-up interval)

When any Task is set in the system, it will display in the form you created, a summary tab in the file and in the Task List of the person it is allocated to (Recurring Tasks don't show until they are due). Tasks are also e-mailed to the allocated person on the required number of days prior to the Due Date

A small number of tasks have been set as mandatory (example, reporting serious injuries to the statutory authority). *These cannot be deleted*

SafetyBase Tips and Tricks for adding Safety Documents

If the file status is left as **"Under review"**, the file will show on the Dashboard Open Files list. This is important, as a means of ensuring visibility to all affected parties

Consider associating an electronic document (example, an existing image, pdf, spreadsheet, document, video etc), using the **"Attach Documents"** tab, or inline toolbar at the bottom of your screen while entering data. Record the document's details by completing the appropriate data fields, then click Attach Document. The document will upload and be available for viewing. Many file types will display as a thumbnail

You can associate a SafetyBase file using the **"Link Files"** inline button on the toolbar at the bottom of the screen while entering data, or afterwards, using the Tasks tab (example, Hazard, Fault Report, Accident Investigation or similar file that has direct relevance): Record the file's details by completing the appropriate data fields, then click ADD. Use the progressive filtering of the drop lists and ADD the file you want. The file will be linked. If you follow the link, the linked file will automatically have a link back to the file you came from

Remember to link People with this file type, using the **"Associate People"** inline button on the toolbar at the bottom of the screen while entering data, or afterwards, using the Associate People tab. Doing this will build an automatic safety history for each person, which you can view by clicking on the person's name anywhere in the account

Check file history in the **"Status Log"** tab. This automatically records status changes to the file. If you would like to monitor the file, click the **"Watch"** button at the top of the file summary. This will place the file on your Watchlist and e-mail you whenever the file status changes