Annual Plans

Legal Requirements for Annual Plans

Managing health and safety requires deliberate actions and planning activities. Whereas some activities, such as accident reporting are, by nature reactive, others, such as training, hazard management and emergency response, require reviews or regular monitoring to maintain currency and relevance

Procedure for Annual Plans

Use the templates under the **Safety Plans** heading. This is a template for planning all the critical reviews and events that are necessary to keep your health and safety system in top shape. These include **Annual Plans, Self Audits, Safety Reviews, Safety Objectives and Critical Event Reviews**

How to create Annual Plans

The **Annual Plans** template prompts you to consider structuring all your upcoming safety activities, from Safety Meetings to Training Reviews and annual Self Audit. It is *suggested* that **Annual Plans** should be completed following group discussion, such as a management committee including employee representatives. This is to ensure the planning process is logical in terms of timing and sequence. *For example, should reviews be annual or more frequent? Should they coincide with other events, such as the self audit? Are some reviews pre-requisites for others?*

Open a Safety Plan and follow the prompts. If you have advanced versions of SafetyBase, they prompt more detailed planning

Using Tasks while creating Safety Plans

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 creating Safety Plans

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