Consultation Rules

Legal requirements for Consultation Rules

Most health and safety legislation requires employers to engage in a consultative manner with employees. This has the benefit of including employees in the process and gaining their support in adopting solutions. It is helpful if the consultation process is formalised under a set of agreed rules

Procedure for creating Consultation Rules

It is *recommended* you develop an agreed process for employee consultation. The process should be agreed by all parties and the agreed process or rules should be available to all parties

How to create Consultation Rules

Open a **Consultation Rules** file under the **Safety Meetings** heading. SafetyBase prompts you to develop basic rules about the constitution of the consultation process

If you have advanced versions of SafetyBase, they prompt you to record more detailed conditions in the constitution

Using Tasks while creating Consultation Rules

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 Consultation Rules

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

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