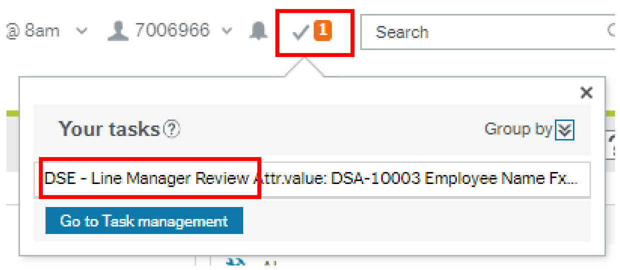
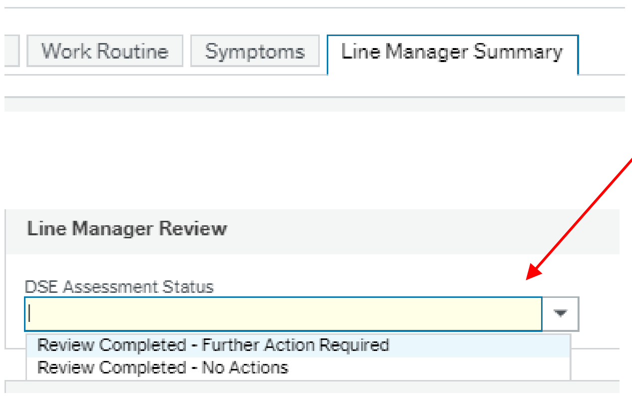
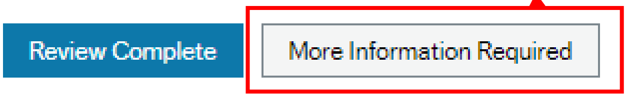
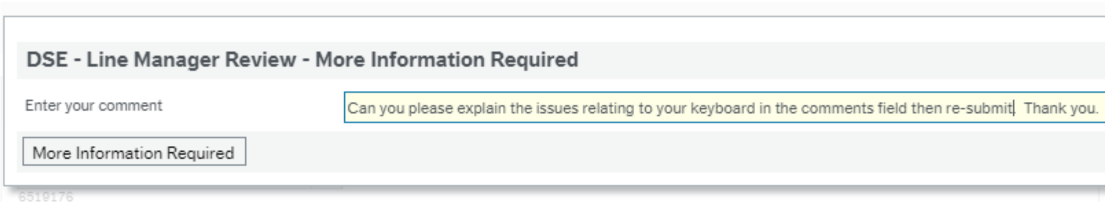
Completing a Display Screen Equipment (DSE) Self-Assessment Form – Line Manager Quick Card

This guidance will allow a line manager to review a DSE Assessment submitted by their employee. There is a hints and tips section on pages 5 to 6 of this document, that will aid you in navigating through the form.

Line Manager – Checking the Employee's Form & Completing any Action Required		
1		Click on your **orange task box** to access any Display Screen Self-Assessment forms that have workflowed to you. **Click on a form** to open it.
2		Read the employees form to identify any issues and consider what action could be taken to resolve the issues and discuss with the employee. Go to the **Line Manager's Summary Tab**. In the **DSE Assessment Status Field** select the appropriate answer to confirm if action is required or not. It is essential that this field is complete, otherwise the form will not be available to update on any actions taken.

Once you have reviewed the form you have 4 options to action the form appropriately.	
3	**If you need more information from the employee first**, then click on the **More Information Required** button. A pop-up message will appear to let you enter some comments for the employee then press More Information Required again– see example in the row below. The form will go back to the employee to amend and re-submit.





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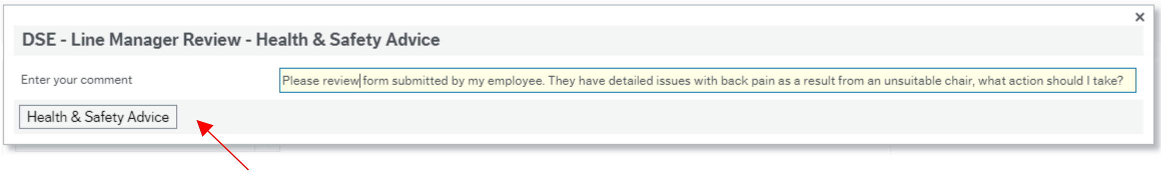
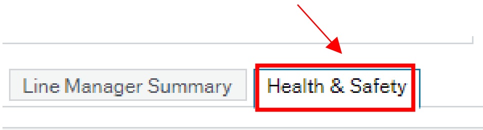
If you require some **advice from the Health & Safety Team**, you can forward the form to them to review and respond back to you as appropriate.

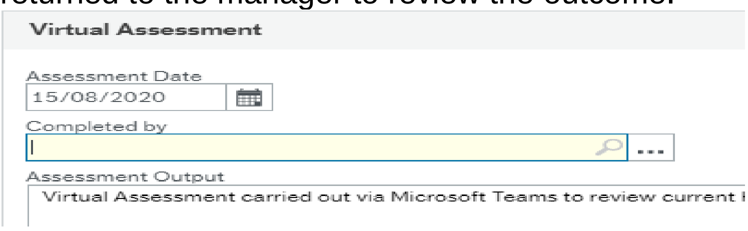
To do this, select the **Health and Safety Advice** button at the bottom of the form. A pop-up screen will appear for you to input your query for the Health & Safety Team. Please be as detailed as possible to ensure the team can assist.



Now click **Health and Safety Advice** button. Once the team has reviewed the form, they will add comments to the "**Health and Safety**" tab and pass it back to you to review and action in Business World.



The Health and Safety Team may decide that there is a requirement for a Virtual Assessment to be carried out. A Virtual Assessment is where a member of the H&S Team will conduct an online meeting with the employee using Microsoft Teams to ask some additional questions relating to their assessment/issues. In some cases, the H&S Team may ask someone in our Occupational Health Service to conduct the Virtual Assessment on their behalf. The Health and Safety Team will action and update the Virtual Assessment fields within the Health and Safety tab. These fields should not be updated by the line manager, however, following the assessment, the form will be returned to the manager to review the outcome.



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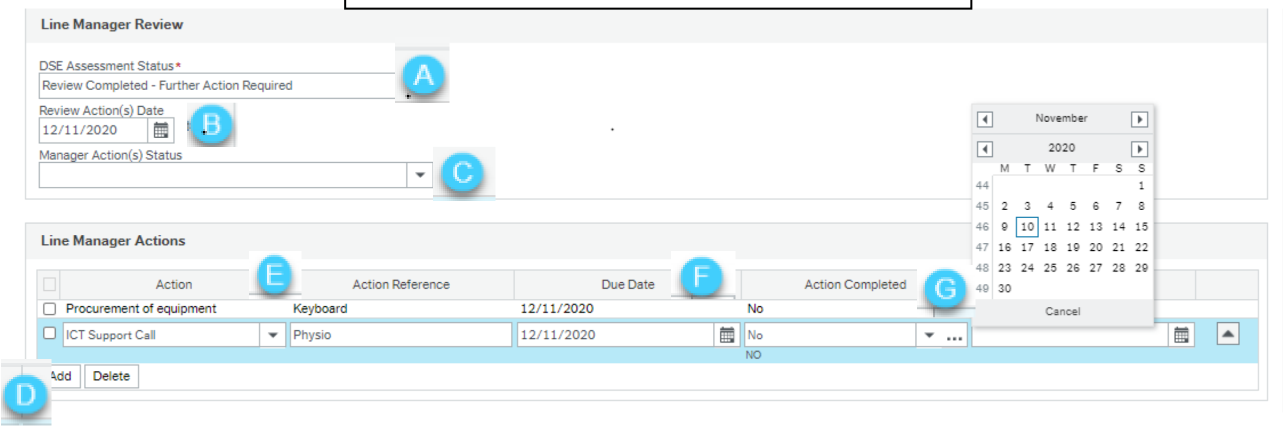
If further action is required, you should detail this in the **Line Manager Actions Table.** –See example below.

A **DSE Assessment Status –** should action be required, use the pick list to select "**Review Completed – Further Action Required**". Alternatively, select "**No Actions".**	B **Review Action(s) Date** –this is the date you are going to review the actions entered in the line manager actions table. You should click the "**Review Complete**" button even if you have not completed the actions. This will send you an alert one day prior to this date review actiondate, as a reminder to review. You can continue to change this date until actions are completed and the form is submitted.	C Managers Action(s) status – when all actions are complete use picklist to select "**Actions Complete**".



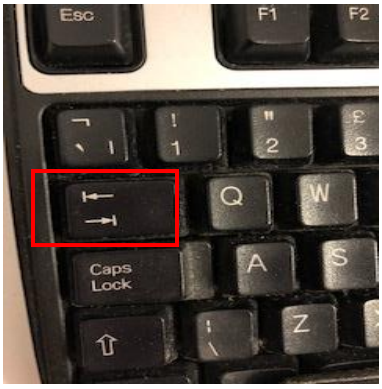
D To enter a new row on the **Line Manager Actions** table, click "Add".	E **Action and Action Reference –** use the picklist to select the type of action to be taken. You can use **Action Reference** field to provide further information on the actions.	F **Due Date –** this date should match the date entered in "**Review Action(s) Date".**	G **Action Completed and Completion Date-** once you have completed the action listed, use the pick list to select "**Yes**" then enter the date you completed the action in the "**Completion Date**" field.

When you have completed all actions select the **Actions Complete** button at the bottom of the form. Your employee will receive the form to review and will need to accept or decline the actions with comments.

Completing a Business World Form – Hints & Tips

Navigating through the form

1



When you complete any field on the form, always use the **tab key** on your keyboard to get to the next question.

This prevent fields from being missed and will pre-populate information on your behalf.

Mandatory Fields

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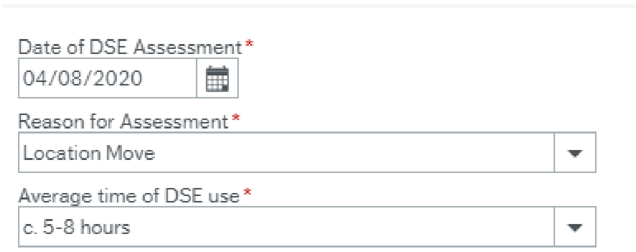
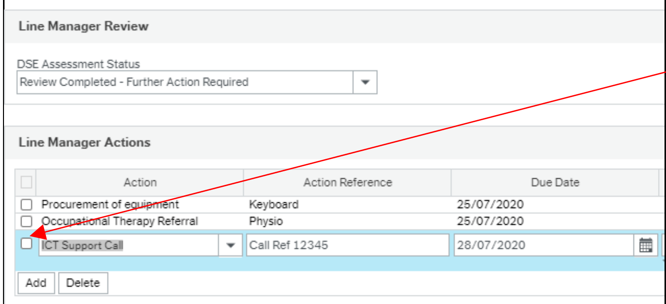


Please note – **mandatory questions** are marked with a **red asterisk** * **-** if you do not answer these questions you will be unable to submit your form at the end.

Deleting Information

3



To delete any lines within a table, click on the small box at the left-hand side of the row you want to delete then click the 'delete' button.

Using Date Fields & Picklists

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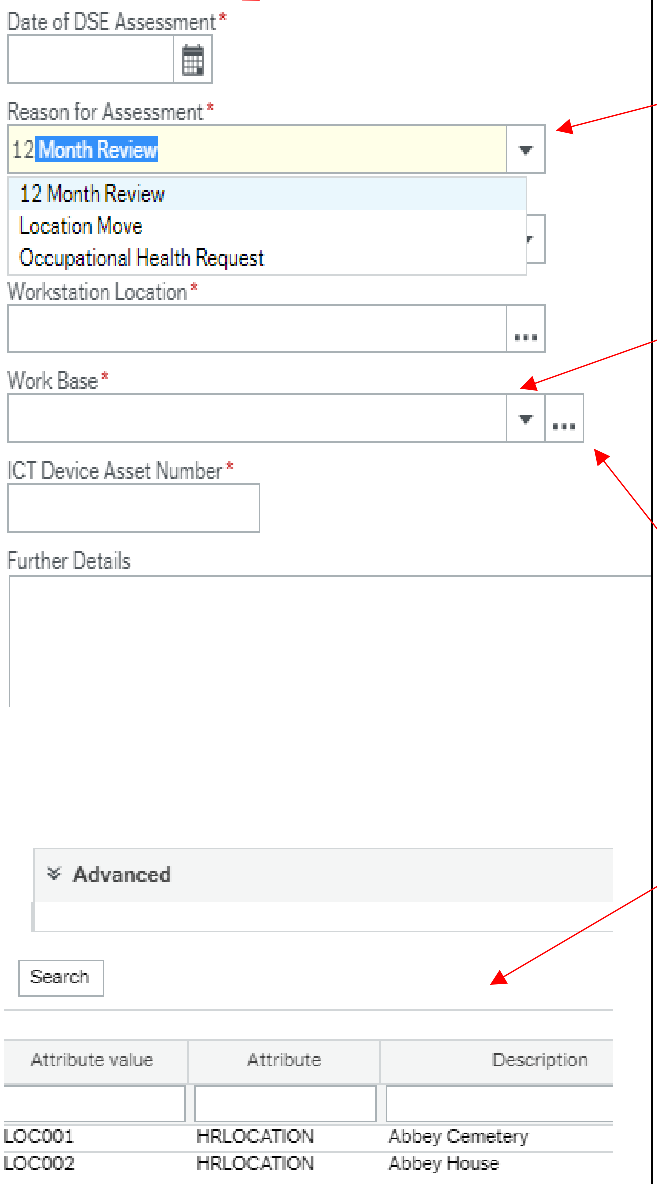

Date Fields – Either type 0 (zero) then press your tab key for today's date **or** click on the calendar icon and select today's date **or** type the date in this format DDMMYY.

Pick Lists

- **Type ahead** – start typing what you want to put in the field, and it will appear if it is an option. Select from the list and then tab. This works best when you know what options you have.
- **Review List** – hit your spacebar or the black arrow to the side of the field and scroll through the list to select the relevant option. This works best if you are unsure what the list contains. If the list is long, then you will need to use the larger view via the three dots.
- **Three dots for larger list** - Click on the **3 dots**. Then click on **Search** to see a full list. Click on the word 'description' to put list into alphabetical order (A to Z). Click the word description again if you want to see the list in reverse order (Z to A). Once you find relevant selection, just click on it and it will take you back to the form and the field will now be populated. If the field does not have these options, it means it is a free text field and you can just type your answer directly into the field.