

Employee & Line Manager Guidance – Completing an Incident/Accident Form in Business World ERP

This guidance will assist you in completing an Incident/Accident Report Form.

Incident/Accident Forms must be completed as soon as possible to allow the Health and Safety Executive be notified if required. Please note, the more information you provide when you are initially completing the form, the quicker the H&S Team can take any required action, without returning the form to you for further details.

Use the links below to navigate to the relevant section guidance –

- 1) [Who can complete Incident/Accident Form?](#)
- 2) [Workflow of Incident/Accident Form in BW ERP](#)
- 3) [Accessing the Form](#)
- 4) [Save Form as Draft](#)
- 5) [Attach Supporting Documentation to the Form](#)
- 6) [Submitting a Form](#)
- 7) [Line Manager - Reviewing an Incident/Accident Form Submitted by Employee](#)

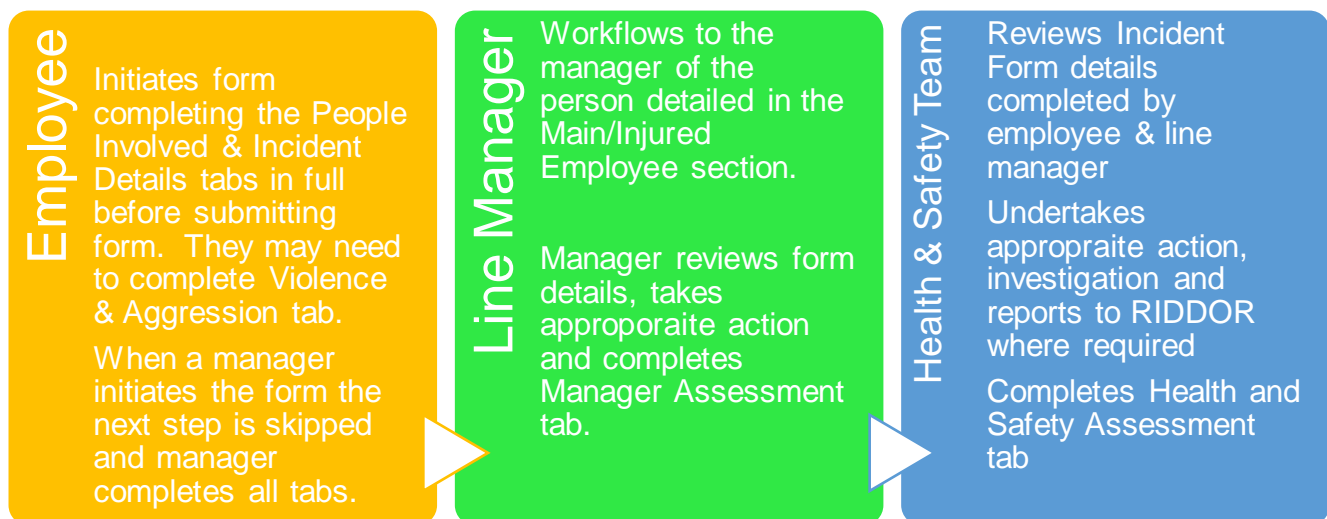
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Who can complete an Incident/Accident Form

- An employee can complete a form to report an incident or accident they were involved in if they were the main/injured person.
- An employee can complete a form on behalf of a colleague or non-employee who was the main/injured person involved in an incident or accident.
- A line manager can complete a form on behalf of an employee they manage and who was the main/injured person involved in the incident or accident.
- If multiple people were involved in the Incident/Accident but no one was injured, only one form needs to be completed. However, if anyone was injured then a separate form must be completed for each injured person.

Workflow of Incident/Accident Form

Workflow

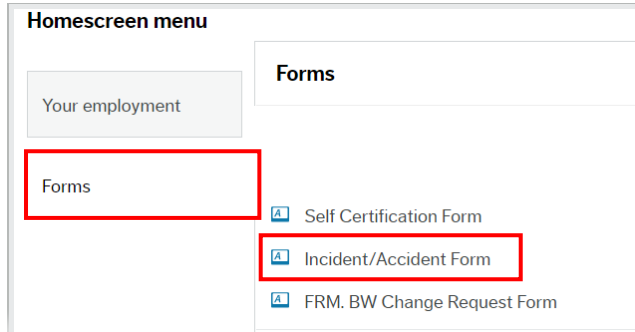


If the form is not completed in full, with accurate information it can be returned in workflow to the previous step.

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Accessing the Incident/Accident Form

1



To create a new form, navigate to your **Homescreen Menu** and select **Forms**.

Select the **Incident/Accident Form** from the list.

2

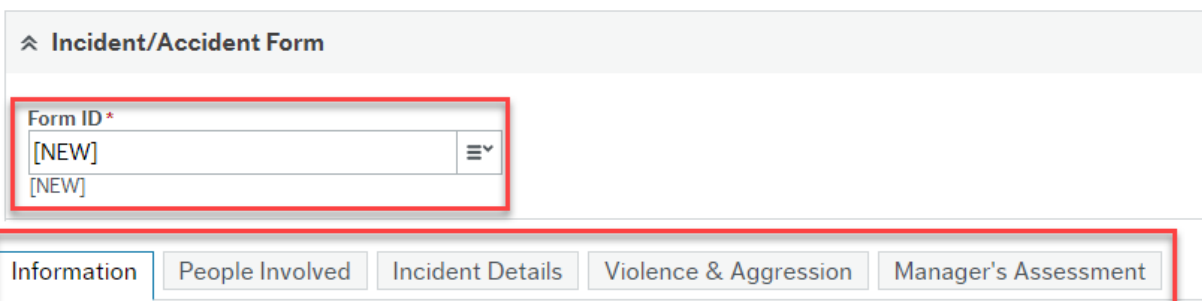
When the form opens-up, the **Form ID** will auto-populate as **NEW**, this should not be changed. Once you complete and submit the form BW ERP will give the form a unique ID Number.

The form contains several tabs which should be completed in full. Employees will have access to the **Information**, **People Involved** and **Incident Details** Tab. Throughout completion of the form if you state that the incident was considered violent or aggressive, the **Violence and Aggression** tab will also appear.

Managers also have access to the **Manager's Assessment** tab which they must complete. Managers should not complete this tab if they are completing the form for themselves as their own manager will do this for them.

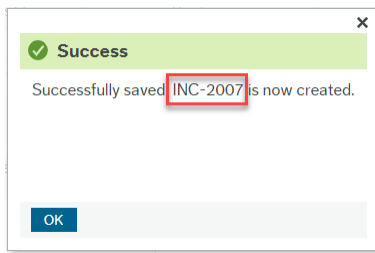
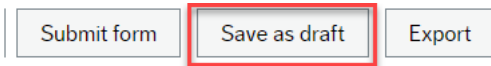
The **Information** tab tells you what this form should be used for and includes basic guidance that you should read and follow.

Incident/Accident Form



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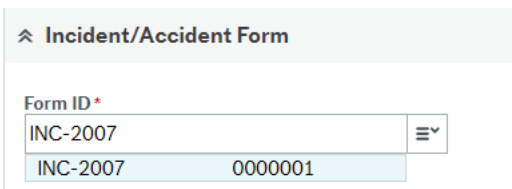
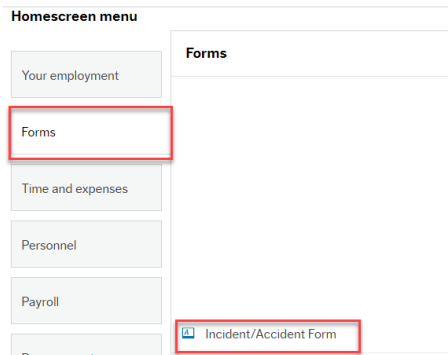
Save Form as Draft



If you need to save the form as a draft, you must first ensure you have completed all mandatory fields, or you will be unable to save the form.

Click on the **Save as Draft** button at the bottom of the form, ensuring you receive a success message. It may be useful to take a note of the **Form ID** to make it easier to find the form later. You can now continue to fill in the form or close the form, until you are ready to continue.

3



To find a saved form again, navigate to **Forms** in your **Homescreen** and select **Incident/Accident Form**.

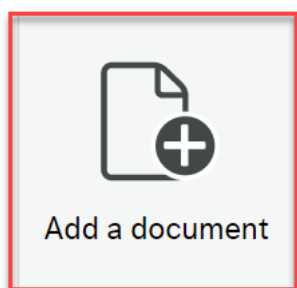
In the **Form ID** field, delete **[NEW]** and click your spacebar. All available Incident Form IDs will appear, and you can select the correct form. Click your tab key and all the details you previously completed will populate.

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Attach Supporting Documentation to the Form

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You must ensure that you have fully completed all fields of the form in detail and only attach documents if you run out of space or if they include further information not asked for in the form.



If you have images, statements, or further information you wish to attach to the form you must firstly Save as Draft.

Scan and save your document as a PDF on your computer drives. Name your document in the following format: **YYYYMMDD, Incident Report, Employee's Name** e.g. **20190225, Incident Report, Bill Smith**.

Now click on the paperclip button at the top-right of your screen when in the form. A pop-up box will appear. Click on **Add a document** button and another pop-up will appear.

5

Document type – select **Incident/Accident Form Documents** from the picklist.

Click on the **Upload** button. This will take you to your drives. Double click on the document you have saved, and it will upload.

You can add a **Document Description** stating what the document is, for example statements, photo's etc.

Click on the **Save** button.

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Submitting an Incident/Accident Form

Prior to submitting your form, please ensure that you have *completed all fields and tabs, provided as much information as possible and that it is accurate*. Managers should also ensure they have completed the **Manager's Assessment** tab, but only if they are not the main/injured person. Getting this right, will prevent your form being sent back to you for further information and allow the Health and Safety Team to take appropriate action as quickly as possible.

Click on the **Submit form** button at the bottom of the form.

Clear

Print preview

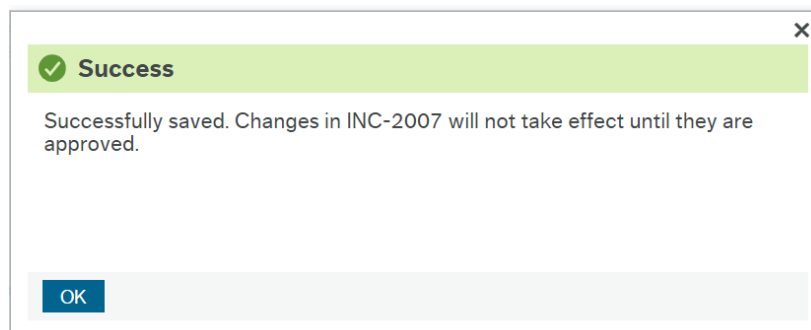
Submit form

Save as draft

Export

6

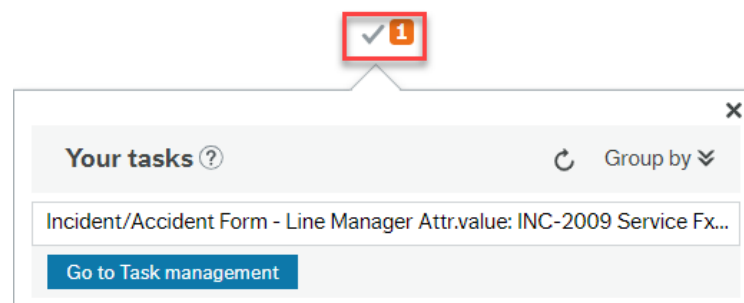
Ensure you receive a **Success** message.



Line Manager - Reviewing an Incident/Accident Form

When an employee submits a form for themselves, a colleague, or a non-employee you will receive the form as a **task** in Business World. Open the task and review the information completed by the employee. Ensuring that the information is accurate and provides enough detail.

7



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8

Should information be inaccurate or limited then you should contact the employee directly to discuss. Where possible you should update this information yourself but if, once you have spoken with the employee, they require to update the form themselves, click the **Decline** button at the bottom of the screen. A pop up will appear and you should detail what updates are required as per discussion with employee. Click **Decline** again.

Approve

Decline

Save draft

Incident/Accident Form - Line Manager - Decline

Enter your comment

Please attach photo's you have taken of injury and return as soon as possible.

Decline

It is good practice to ensure employees return the form to you in a timely manner to avoid delays in it reaching the Health & Safety Team. Should the form not be returned within a few days, please contact the employee and ask them to action as soon as possible.

9

After you have reviewed the form and are happy it is fully complete you should navigate to the **Manager's Assessment** tab and complete in full. Once you are happy you have provided accurate and detailed information, send your form to the Health and Safety Team for review by clicking the **Approve** button at the bottom of the screen and ensure you receive a **Success** message.

Manager's Assessment

Approve

Decline

Save draft



Success

The item is successfully processed. There are no more items to process.

OK

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