Keller Soft® Workplace Accident Investigator

User Manual

Home

Use the buttons on this window to access the areas of the program:

Reference - Click this button to view general information on accident investigations.

Plan - Click this button to create an accident investigation plan, and to access information on how to create one.

Train - Click this button to view, edit, and add information on accident investigation training for employees.

Notify - Click this button to view, edit, and add information on accident investigation notification.

Manage - Click this button to view, added, or delete accident investigations that you have recorded in this program.

Investigate accident - Click this button to access the main area of this program and begin recording an accident investigation.

Reports - Click this button to generate a variety of reports, including an accident cost report, a cause and corrective action report, an accident summary report, and an injuries report,

Company and Locations - Click this button to add, edit, or delete information regarding your company and its location(s).

Employee Information - Click this button to add, edit, or delete information regarding employees. Note that you can import a list of employees by selecting the 'Important employees' function from the 'File' menu.

Reference, planning, training

Reference window

This window contains a menu of links to general information regarding accident investigation procedures. Click on the links to view and/or print the information.

Plan window

This window contains links to create/customize your accident investigation plan, as well as accident reporting and investigation reference material.

Click 'Accident investigation plan' to go to the Create accident investigation plan window. Click the other links below this to view/print the reference material.

This window also contains links to an accident call record and contact form:

Instructions for downloading and using these forms

Before you begin, you must have Adobe® Acrobat Reader® installed on your computer to view these files. You may download the reader at no charge at: http://www.adobe.com/products/acrobat/. To view the form fields easier, you may want to set your field highlight option. To do this, open the Reader, click Edit, Preferences, and then General. Once in the Preference menu, click on Forms and click on your Highlight Form Fields options. To edit/complete forms, tab from field to field to enter your form information. Use the spacebar to toggle check boxes on or off. Once complete, you may print the form by clicking the printer icon or using the File > Print command. **Note:** Without the appropriate Acrobat® software, completed forms cannot be saved*, but fields will remain in the form until you close your internet browser window. To download blank files to your pc, right mouse click on the form link and click Save Target as… (Internet Explorer) or Save Link as… (Netscape), select a location to save the file to on your PC and click Save.

*Requirements for Saving Completed Forms

You must have Adobe Acrobat® or Adobe Approval 5® to save the edited forms to your PC using the File > Save commands. Note: If planning to keep several versions of the completed form, be sure to save each form file under a different filename.

Create an accident investigation plan window

Use this window to edit, delete, and rename accident investigation plans. The program provides a plan template, 'Accident Investigation Plan', which displays at the top of the list. Note that you cannot edit this plan; you must make a copy of it. Select the template, and click the 'Copy' button at the bottom of the list. You will be prompted to give the copy a name, and you will be taken to the Accident investigation plan customization window

All plans that you create will appear in the list. Select the plan from the list by clicking on it and use the buttons at the bottom of the window to perform the action you want:

Accident investigation plan customization window

This window provides you with a variety of ways to set up your plan:

'Fill-in-the-blank' tab: You are able to edit information anywhere there are blue underlined links. Click on the link, type in the appropriate information, and it will be added to the plan.

'Question' tab: You provide the answers to a series of questions regarding your plan.

'Summary' tab: Use this tab to create a plan summary.

'Create full edit' button: Click this button if you want to edit the plan in Microsoft® Word®. Use the 'Print' button at the top of this window to print the plan.

Accident investigation plan full edit window

Use this window if you want to edit the text of plan in Microsoft® Word®. Click the 'Return' button when you have finished editing it.

Train window

This window contains a variety of documents pertaining to accident investigation training.
You cannot edit documents provided by the program. If you want to edit one, you must make a copy of the item: click the 'Copy' button and type in an appropriate name. The document will appear in the list. You can now open and edit the document by clicking the 'Edit' button. Click the 'Add' button if you want to add your own document.

View, or delete a document, select a document and click the appropriate button at the bottom of the list. Note that you cannot delete documents provided by the program.

This window also contains links two certificates of training for employers and employees:

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Before you begin, you must have Adobe® Acrobat Reader® installed on your computer to view these files. You may download the reader at no charge at: http://www.adobe.com/products/acrobat/. To view the form fields easier, you may want to set your field highlight option. To do this, open the Reader, click Edit, Preferences, and then General. Once in the Preference menu, click on Forms and click on your Highlight Form Fields options. To edit/complete forms, tab from field to field to enter your form information. Use the spacebar to toggle check boxes on or off. Once complete, you may print the form by clicking the printer icon or using the File > Print command. **Note:** Without the appropriate Acrobat® software, completed forms cannot be saved*, but fields will remain in the form until you close your internet browser window. To download blank files to your pc, right mouse click on the form link and click Save Target as… (Internet Explorer) or Save Link as… (Netscape), select a location to save the file to on your PC and click Save.

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Notify window

This window contains a variety of documents pertaining to accident investigation notification.
You cannot edit documents provided by the program. If you want to edit one, you must make a copy of it: click the 'Copy' button and type in an appropriate name. The document will appear in the list. You can now open and edit the document by clicking the 'Edit' button. Click the 'Add' button if you want to add your own document.

To view or delete a document, select a document and click the appropriate button at the bottom of the list. Note that you cannot delete documents provided by the program.

Investigate accident

Accident window

This window is the start of your accident investigations. All fields except 'Work area:' are required to be filled out.

'Completed by:' Enter the name of the person who completed the investigation in this field. The drop down list displays the employees that have been entered through the Employee information window or through the employee import function, which is accessed through 'Import Employees' under the 'File' menu. Select 'Add new' from the top of the drop down list to add an additional employee.

'Date:' Select the date of the accident investigation from the drop down calendar.

'Status:' Select the appropriate status of the accident investigation from the drop down list.

'Brief description:' Type a brief description of the accident in this text field

'Date of accident:' Select the date of the accident from the drop down calendar.

'Time:' Set the time of the accident by using the up and down arrows.

'Accident location:' Select the location where the accident occurred. The list is populated with locations that you entered in the Company and locations window. Select 'Add new' from the top of the drop down list to add another location.

'Work area:' Select the work area where the accident occurred. Select 'Add new' from the top of the drop down list to add work areas. Click the 'Edit list' Link to add, edit, or delete items from the list.

'Accident\Near miss' Click the appropriate radio button. If you choose 'Accident', you will be required to enter information about injuries and property damage. If you choose 'Near miss', you will not enter that information.

'Injury to record?' Click the 'Yes' radio button to record injury information. Click 'No' if you have no injury information to record.

'Property damage to record?' Click the 'Yes' radio button to record property damage information. Click 'No' if you have no property damage information to record.

If you have the Keller-Soft® OSHA 300 Recordkeeper or the Keller-Soft® Workers' Compensation Manager plus OSHA 300 Recordkeeper installed on your computer, click the 'Import data' link at the bottom of the window to import injury information.

Click the 'Next' button to proceed to the next window.

Import data dialog box

If you have the Keller-Soft® OSHA 300 Recordkeeper or the Keller-Soft® Workers' Compensation Manager plus OSHA 300 Recordkeeper installed on your computer, you can import injury information from the cases you have recorded in these applications.

Click on any of the column headers to sort the list. Select a record from the list and click the 'OK' button to import the case information.

Injuries window

Use this window to record injuries associated with the accident investigation. You can record multiple injuries in this window by clicking 'Record another injury' in the lower left-hand corner. If you want to remove an injury that you have recorded, click the 'Remove' button next to the right of the injury. Note that if you have only one injury recorded, you cannot remove it.

'Name:' - Select the name of the employee who sustained the injury from the drop down list.

'ID:' - This field will be populated from your selection in the 'Name:' field.

'Case #:' - Tie the appropriate case number in this field.

'Injury or illness:', 'Body part affected', 'Source of injury:', 'Event or sequence:' - Select the appropriate item from the lists in these fields. Click 'Add new' if you need to add items to these lists. Click the 'Edit list' links next to these fields to add, edit, or delete list items. Note that you cannot edit or delete list items that were provided by the program.

Click the question mark icons next to the fields in this window for further information.

Click the 'Next' link to move to the next window.

List property damages window

Use this window to record property damage associated with the accident investigation. You can record multiple incidences of property damage in this window by clicking 'Record additional damages' in the lower left-hand corner. If you want to remove a property damage incident that you have recorded, click the 'Remove' button next to the right of the injury. Note that if you have only one incident recorded, you cannot remove it.

Type a description of the property damage in the text field. Click the 'Yes' radio button if you had to replace or repair the property. Type in the amount of money the property damage cost in the 'Associated costs:' field. A total of the costs will display at the bottom of this window.

Click the 'Next' link to move to the next window.

Accident description window

This window provides a standard word processing interface for you to describe the accident. Click the 'Writing a detailed description' link for guidance.

To include additional material such as photos, videos, forms, or interviews, click on 'Enter accident data' link at the bottom left-h and corner of this window.

Click the 'Next' link to move to the next window.

Accident information window

Click the links under 'Documents and forms:' to access an evidence collection checklist, information on how to collect evidence and information on identifying evidence and contributing factors.

Click the links under 'Additional information' to edit information and to include additional data elements in your accident investigation:

Accident - Click this link to edit information in the Accident window.

Accident description - Click this link to edit information in the Accident description window.

Corrective actions - Click this link to edit information in the Corrective actions window.

Costs - Click this link to record costs associated with the accident.

Employee interview - Click this link to access a template you can use to record an employee interview.

Equipment involved - Click this link to record information on equipment that was involved in the accident.

Event sequence - Click this link to include a step-by step account of the events leading to the accident.

Injuries - Click this link to edit information in the Injuries window.

Photos, videos, and sound files - Clip this link to attach electronic media to the accident investigation.

Personal Protective Equipment - Click this link to record information on personal protective equipment.

Property damages - to edit information in the List property damages window.

Root causes - to edit information in the Root causes window.

Witness forms- Click this link to access a template you can use to record a witness statement.

Event sequence window

Use this window to record an accident as a series of steps. Type the first step in the text field provided. Click the 'Add' button to add additional fields to record the steps. Click the 'Remove' button to the right of a text field if you want to delete it.

Photos, videos, and sound files window

Use this window to add or delete photos, video, and sound files. Click the two links at the top of the window for reference information on photographing or sketching the accident scene.

Click the 'Add' button to add a file. Browse to the location on your computer or network where the file exists, select it, and click 'Open'. You be prompted to provide a description for the file. Type in an appropriate description and click 'OK'. A copy of the file will be made, and its name will appear in the list.

To renew or delete a file, use the appropriate buttons at the bottom of this window.

Manage witness forms window

Use the template in this window to record witness statements. You cannot edit or delete the template - you must make a copy of it. Select it and click the 'Copy' button. You will be prompted to give the copy a name. The copy will then open for you to edit. Click 'OK' when you are done, and it will appear in the list with the name you assigned to it.

If you want to copy, edit, view, or delete, copies of the template you made, click the appropriate button at the bottom of the list.

Costs window

Type a description of the cost in the text field. List the actual cost in the 'Associated costs:' field. To record multiple costs, use the 'Record additional costs' link at the bottom left-hand corner of the window. As you add costs, the cost total will display at the bottom center of the window.

If you want to remove a cost, click the 'Remove' button next to the cost you want to remove. Note that if you only have one cost, you cannot remove it

Manage employee interviews window

Use the template in this window to employee interviews. You cannot edit or delete the template - you must make a copy of it. Select it and click the 'Copy' button. You will be prompted to give the copy a name. The copy will then open for you to edit. Click 'OK' when you are done, and it will appear in the list with the name you assigned to it.

If you want to copy, edit, view, or delete, copies of the template you made, click the appropriate button at the bottom of the list.

Manage personal protective equipment window

Use this window to record information on personal protective equipment. Click the 'Add' button to open the Additional information dialog box, where you can enter information on the equipment. To edit the information to delete it from the list, click the appropriate button at the bottom of the window.

Personal protective equipment - Additional information dialog box

Use the fields in this dialog box to fill out as much information as you want on the equipment. Click 'OK' button when you are done. If you want to edit the information, you can do so from the Manage personal protective equipment window.

Manage equipment information window

Use this window to record information on equipment involved in the accident. Click the 'Add' button to open the Additional information dialog box, where you can enter information on the equipment. To edit the information to delete it from the list, click the appropriate button at the bottom of the window.

Equipment - Additional information dialog box

Use the fields in this dialog box to fill out as much information as you want on the equipment. Click 'OK' button when you are done. If you want to edit the information, you can do so from the Manage equipment information window.

Root causes window

Use this window to assign causes to an accident investigation. That 'Major cause' column has general categories, while the 'Root cause' column contains specific examples. Click the checkbox next to a root cause to assign it. If you want to add a cause, click the 'Add root cause' links.

Click the 'Next' link to move to the next window.

Corrective actions window

This window displays causes of the accident that you identified in the Root causes window and corrective actions to take. To assign a corrective action, click the checkbox next to it. Click the 'Add corrective action' link to add one.

Click 'Next' to go to the next window.

Manage corrective actions window

This window displays a list of all corrective actions that you have assigned to an investigation. Click on the 'Corrective actions' or 'Completion date' column to sort the list by name or completion date.

You can change aspects of the corrective actions in these columns:

'Completion date' column: Click in the cell of a corrective action under this column to pick a completion date from the calendar or type a date in. If you don't want to assign a completion date, click the checkbox to the left of the date so that there is no check mark displaying.

'Status' column: Click in the cell of a corrective action under this column and choose either 'Closed', 'In progress', or 'Pending'.

'Assigned to' column: Click in the cell of a corrective action under this column to assign an employee to the corrective action.

Managing, reporting

Manage window

This window displays a list of all accident investigations you have entered.

You can edit or delete an accident investigation by selecting it and clicking the appropriate button at the bottom left-hand corner of the window. You can sort the list chronologically or by name by clicking on the 'Date' or 'Brief Description' column.

If you assigned corrective actions to an investigation, they will display in the 'Corrective actions' column. Click the 'Manage corrective actions' in this column to go to the Manage corrective actions window, where you can change the completion date or status of a corrective action, or assign the corrective action.

Reports window

This window contains a menu of links to a variety of reports.

Costs report: Click this link to generate a report that displays costs associated with one or more accidents. The report is based on costs for accidents that you entered in the List property damages window.

Root cause and corrective action report: Click this link to generate a report that displays accident causes and corrective actions that have been taken. This report is based on information that you entered in the Root causes window and Corrective actions window.

Accident summary report: Click this link to generate a report that displays a summary of accidents.

Injuries: Click this link to generate a report that displays a summary of injuries.

Report

All accidents that you have recorded in the program display in this list. You can sort the list by accident name or date by clicking on the appropriate column header. Use the 'Select all' checkbox at the bottom of the list to generate the report from all accidents. If you want to generate the report from certain reports, click the check boxes next to the reports to select them.

Administrative

Employee information window

Use this window to work with your employee records. Three drop-down list boxes at the top of the window allow you to filter which employees to look at by location, job title, and active\inactive status. You can also sort the employees by employee name or ID by clicking on the respective column headings at the top of the employee list.

To quickly assign, remove, or edit locations or job titles for an employee, or to change the active/inactive status, select an employee from the list, then click in either the All 'Locations', 'All Job Titles', or Active + Inactive drop down boxes.

Use the appropriate buttons at the bottom of the window to add, edit or delete an employee.

Adding or editing an employee

Click ‘Add’ in the Employee Information window if you wish to add a new employee to the list, or click the 'Edit' button if you wish to change information on an existing employee. The ‘Employee Information’ dialog box appears. Most fields are optional (except Employee ID, First Name and Last Name), so that you can add as much or as little information about the employee as you wish or have available. Note: There are two tabs at the top of this dialog box: 'Personal Information' and 'Employment Information'. Click on either tab to enter the respective information.

Click ‘OK’ after you have finished adding or editing the employee information.

Click ‘Cancel’ to close the ‘Employee Information’ dialog box without making any changes.

Deleting an employee

Click ‘Delete’ in the Employee List window with an employee selected if you want to remove the information on that employee. A confirming dialog box appears asking if you are sure. Click ‘Yes’ and one of two things will happen:

The employee information will be deleted, or you will receive a message that the employee has training (or other) information attached to them so you must remove all those "connections" before you can remove the main employee listing.

Company information/Location information

Use the two tabs in the upper left corner of this screen to enter company or location information.

Company information tab

A default entry of ‘Your Company’ appears in the 'Company Name’ field when you first access it. You may change it tofo match your company’s identity. Fill in the rest of the fields with appropriate information. Click the 'OK' button if you do not want to add location information and are done entering company information.

Locations tab

Your location information is displayed here. Click the 'Add' button at the bottom left of the window to add a new location. If you want to edit or delete an existing location, select it from the list and click the 'Edit' or 'Delete' button.

