



Incident Reporter™

Risk / Quality Management & Cost Tracking Program



Product Information

Version 2

12.20.09

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Incident Reporter v2

Risk / Quality Management & Cost Tracking Program

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Incident Reporter v2

Risk / Quality Management & Cost Tracking Program

1. IR OVERVIEW

A. FUNCTIONAL REQUIREMENTS

Incident Reporter™ is a powerful and affordable hosted SMS software application that streamlines and simplifies your aviation risk and quality management processes. Now in its third year of development, IR version 2 is in use by more than sixty worldwide airports, air carriers, charter operators, EMS providers and corporate flight departments.



Incident Reporter v2 has been developed in accordance with aviation SMS risk management principles contained in:

- ➔ ICAO Document 9859: Safety Management Manual
- ➔ IATA's Safety Management Systems; The Senior Airline Manager's Implementation Guide
- ➔ FAA's SMS Framework, SMS Assurance Guide (revs. 2 dated 07.15.09), AC 120-92, and AC 150/5200-37
- ➔ Canadian Aviation Regulations Part 1, Subpart 7: Safety Management System Requirements
- ➔ Transport Canada Advisory Circular AC-107-001: Guidance on Safety Management Systems Development

IRv2 meets all ICAO, Transport Canada, FAA and JAA / EASA functional requirements for risk assessment, accountability, documentation and controls.

B. POWERFUL RISK / QUALITY MANAGEMENT AND COST TRACKING TOOLS

Incident Reporter has been designed from the ground up to be intuitive and user-friendly. IRv2 is utilized in conjunction with Omni Air Group's SMS Manual, supporting programs, and Online SMS Training for a complete SMS solution, or may easily be integrated into existing Safety Management Systems. It's important to note that Incident Reporter IS NOT a Safety Management System in and of itself; the program will however become the "heart" of any SMS into which it is integrated, and is a highly effective risk and quality management tool.

Data is collected from Safety Assurance processes such as system / task analysis and employee reports. Hazards, near-accidents and other events are investigated, root causes are determined, and risk analysis is performed. Corrective Action Plans (CAPs) are developed and tasks assigned to appropriate managers, with target dates for the completion of each risk control or corrective action. Monitoring the implementation of these risk controls and corrective actions helps to ensure their effectiveness, and follow-up audits confirm satisfactory results.

Lessons learned from managing each event are then communicated to personnel and industry, further enhancing organizational safety.

All of these activities are documented and tracked in the IR database. Upon completion of the process, records are closed and “locked” to preserve their integrity. Controls built into the program prevent the closing of a record until all associated tasks have been accomplished and follow-up audit results are satisfactory.

2. INCIDENT REPORTER LICENSING AND ACCESS

Incident Reporter is licensed for use on a subscription basis by aviation enterprises as end-users. It is a “hybrid system”, in that it is accessible from supported web browsers, as well as a secure client-server application, [FileMaker Pro](#).

Online reporting is accessible to your employees through supported web browsers, from anywhere in the world. These reports populate the database and generate auto-email notifications to managers of reports received. Links within these emails permit managers to immediately access these reports via web browser (from an iPhone, BlackBerry, or other PDA if desired) and assign investigation responsibilities to appropriate department or base managers.

Managers also use their **FileMaker Pro** client-server applications to assign login names, edit Value Lists, perform data entry, and command IR's powerful data mining, trend reporting and data export capabilities, including full integration with Microsoft Office. For more information, see the document: [How to Integrate FileMaker Pro with Microsoft Office](#)

A. DATABASE HOSTING

OAG employs the same state-of-the-art co-location facilities used by financial institutions to ensure your sensitive safety data is secure and delivered at 99.96% uptime reliability. Housed in a climate and humidity controlled, fingerprint secure “cleanroom” with multiple internet pipelines and backup generators, our servers have redundant power supplies, multiple redundant drives, firewalled with intrusion detection / protection and access logs at the user level. All communications with your IR database (both via web browser and the FM Pro client application) use SSL (Secure Socket Layer) protocol to ensure the highest level of security. Databases are backed up every 3 hours, and full system backups are performed each night and retained for six months. Advantages include high levels of physical security, intrusion detection/protection, automated backups, on-site support, and lifetime software upgrades.

B. CLIENT LICENSES

The FileMaker Pro client-server license permits department managers and administrators to access the full functionality of IR (including printing reports and data import/export), over a secure SSL internet connection. The FM Pro application is recommended for each manager who will be managing risk and quality issues within IR, and may be purchased from OAG for \$150.00 USD per license. Managers may also access the IR database via supported web browser for data entry and task assignment via email, from anywhere an internet connection is available. This includes access via BlackBerry, iPhone or other PDAs.

3. FEATURES AND EASE OF USE

Using Incident Reporter (IR) is easy. Here are just a few of IR's many features:

- ➔ Incident Reporter generates automatic emails when a report is received. From your iPhone or other PDA, you can receive the email, link back to IR and login with the touch of a button, and assign one of your people to investigate, in seconds!
- ➔ Menu choices are user-customizable, so you can define the types of events you want to capture, equipment utilized, stations served and other data that is unique to your operation.
- ➔ IR easily imports up to six photos or reference files / source documents per record.
- ➔ Tooltips direct users to **reference tutorials**, where written guidance and examples help users through various risk management processes, such as how to develop an effective Corrective Action Plan.

Familiarize yourself with Incident Reporter by viewing a 30-minute [demonstration video](#).

A. ONLINE REPORTING

The screenshot shows a web browser window displaying the 'ONLINE REPORTING FORM'. The form is titled 'ONLINE REPORTING FORM' and includes a timestamp 'Record Created: Jun 02 2008 @ 11:42:18 AM'. It features a 'CANCEL' button and a 'SUBMIT FORM' button. The form fields include: DATE OF OCCURRENCE, TIME (24h), TYPE OF EVENT, STATION, EQUIPMENT INVOLVED (LIMIT: 4 ITEMS) with a table for TAIL #, MANUFACTURER, MODEL, EQUIPMENT TYPE, SERIAL #, and ATA CODE, EVENT OR HAZARD SUMMARY, DETAILED DESCRIPTION OF EVENT AND HAZARD, WAS IMMEDIATE ACTION TAKEN TO MITIGATE RISK? (Yes/No/N/A), DESCRIBE IMMEDIATE ACTION(S) TAKEN, SUGGESTION(S) FOR CORRECTION, and YOUR CONTACT INFORMATION (OPTIONAL) including NAME, POSITION, DEPARTMENT (OR COMPANY), PHONE NUMBER, TYPE, and E-MAIL. A 'SUBMIT' button is at the bottom right. A note at the bottom left says: 'If you want a copy of this report for your records, print it now—using your Web browser's Print command—before you click on the SUBMIT button at right.'

Incident Reporter supports *Instant Web Publishing*. This feature allows you to set up your IR database for Online Reporting. In addition to online reporting, managers and users may also perform data entry while in the field. Access to your IR database via the internet, whether for reporting purposes or for data entry, requires a supported web browser.

Windows web users need Microsoft Internet Explorer version 6.x or Firefox 1.x on Windows.

On the Mac OS, web users need Safari 1.2.x (Mac OS X 10.3), Safari 2.0.x (Mac OS X 10.4) or Firefox 1.x only. On both platforms, some earlier versions of Microsoft Internet Explorer and Safari are blocked.

Other Mozilla family browsers are not blocked but are unsupported, and users will receive a dialog encouraging them to upgrade to a supported browser. *JavaScript must be enabled in the web browser.*

4. EMAIL NOTIFICATIONS

IR supports automatic and manual email notifications for various risk management processes throughout the program. For example, when an online report is received, an acknowledgement of receipt is sent to the reporter, *provided the reporter includes a valid email address in the report*. In addition, receipt-of-report notification may also be sent to up to six user-specified managers. This ensures timely notification to key managers that a report has been received.

Email notifications may also be manually sent, or set by administrators to automatically alert users of approaching due dates for various risk management processes, such as when:

- ➔ A manager is assigned to investigate an event or other safety issue
- ➔ Results of an investigation are due
- ➔ The development of a Corrective Action Plan (CAP) is due
- ➔ Implementation of a Risk Control (RC) or Corrective Action (CA) is due
- ➔ A follow-up audit is due
- ➔ A communication of Lessons Learned is due

The screenshot shows the 'E-MAIL PREFERENCES' window in FileMaker Pro. The window has a blue header with a 'MAIN' button and several navigation buttons: PERSONNEL, EQUIPMENT, MANAGERS, ADMIN ONLY, IR DATA ENTRY, RECORD STATUS, COST DATA, COST REPORTS, DATA MINING, LOGIN NAMES AND PASSWORDS, E-MAIL PREFERENCES (selected), VALUE LISTS, and ACCESS LOG. Below these are tabs for different notification types: Due Date Settings, Acknowledgement, Manager Assigned, Investigation Due, CAP Due, RC/CA Due, Follow-up Due, and Lessons Learned Comm Due. The 'Acknowledgement' tab is active, showing settings for 'ENABLE E-MAILS?' (Yes/No), 'FROM ADDRESS', 'REPLY TO', 'SUBJECT', and 'BODY'. The 'BODY' field contains a template for an acknowledgement email. There are also fields for 'BCC' and a 'MESSAGE BODY' field with a template for a report received notification. The window also includes buttons for 'Name', 'Date', and 'Record #'.

For all of the above events (except report acknowledgement and when assigning a manager to investigate a report) you can set the number of days in advance of the due date that an automatic e-mail will be sent.

Note:

For more information regarding online reporting with Incident Reporter, see the document titled: *Online Reporting with IR*.

5. VALUE LISTS

To facilitate data entry into IR, most fields contain pop-up or drop-down menus. Users with **admin** authority may customize and add to the selections available in these drop-down menus by going to VALUE LISTS at any time. The types of events you wish to capture, airports served, types of missions, and other information unique to your operation is entered here. For maintenance and equipment reliability tracking, ATA codes are offered.

FileMaker Pro - [IR_Operators_Demo (OAGHOST)]

VALUE LISTS DATA ENTRY

NEW **FIND** **MAIN**

PERSONNEL **EQUIPMENT** **MANAGERS** **ADMIN ONLY**

IR DATA ENTRY **RECORD STATUS** **COST DATA** **COST REPORTS** **DATA MINING**

LOGIN NAMES AND PASSWORDS **E-MAIL PREFERENCES** **VALUE LISTS** **ACCESS LOG**

TYPE OF EVENT Audit, External ☐

CLASS OF EVENT Audit, Internal (Dept.) ☐

AIRPORT Continuous Monitoring ☐

LOCATION ERS - Hazard Report ☐

MISSION ERS - Irregularity Report ☐

FLIGHT NUMBER ERS - Online Report ☐

FLIGHT RULES ERS - Report Name ☐

FLIGHT PHASE Evaluation, External ☐

WEATHER Evaluation, Internal ☐

VISIBILITY Event Investigation ☐

REPORTING SOURCE Management Review ☐

REPORTED VIA N/A ☐

OPERATIONAL PROCESS System / Task Analysis ☐

ATA CODE

LESSONS LEARNED COMM RECIPIENT

COST TYPE

COST CATEGORY

To view a value list:

1. Click on the appropriate button in the left-hand list.

To add a new value:

1. Select a field name from the MENU list.
2. If there are no entries already entered in the VALUE list, double-click on the first line and enter a value.

If at least one entry already exists in the VALUE list, click the **NEW** button at the top of the screen then enter a new entry in the top row of the VALUE list.

3. Click your mouse anywhere in the light blue area of the screen to set the addition; the list will automatically re-sort alphabetically.

To edit an existing value:

1. Double-click on the existing value and proceed to edit it.
2. Click your mouse anywhere in the light blue area of the screen to set the change.

To delete an entry from a value list:

1. Click the red square to the right of the value you want to delete.

Irregularities, hazards, errors, quality escapes and other events may be tracked, measured, and reported under classes such as Safety, Security, Environmental Protection, Occupational Health, Customer Service, and other user-defined headings. Under these classes, events may be further defined within the TYPE OF EVENT category.

Changes or additions to value list entries automatically change the options available for selection on drop-down menus. One-time entries may also be made by clicking in a field. These features make data entry fast and easy, while reducing data entry errors.

NOTE:

Value List entries under the **REPORTED VIA** category permit sources of data from Safety Assurance activities to be tracked throughout the course of all Safety Risk Management processes.

Associating each Risk Management Record (RMR) with an **OPERATIONAL PROCESS** permits managers to rapidly locate all risk controls associated with a process for performance of Internal Audits and Internal Evaluations.

6. IR DATA ENTRY

A. INCIDENT TAB

IR's Main Screen presents when the program launches. The main screen is customized with your organization's logo and graphics. Clicking on *IR Data Entry* reveals the Incident Tab:

The screenshot shows the 'IR DATA ENTRY' form in FileMaker Pro. The form is organized into several sections:

- Navigation Buttons:** FIND, MAIN, SRM REPORT, PERSONNEL, EQUIPMENT, MANAGERS, ADMIN ONLY, IR DATA ENTRY, RECORD STATUS, COST DATA, COST REPORTS, DATA MINING.
- Tabs:** Incident, Details, Investigation / Root Causes, Risk Analysis, Corrective Action Plan, RC/CAs, Follow-ups, Lessons Learned, Images.
- Event Details:** TYPE OF EVENT (Flight Interruption), CLASS OF EVENT (Quality), DATE OF EVENT (Oct-01-2009), TIME (24H) (7:30 UTC), RECORD (RMR000363), OPENED (Oct-03-2009).
- Personnel:** AIRPORT (BFI), LOCATION (Taxiway), WEATHER (Icing Conditions), VISIBILITY (1 Mile), PIC (Turcanik, Clint), SIC (Wright, James), F/A (Yip, Karen), ACM (N/A), MISSION (Charter), FLIGHT # (6335), PAX (32), FLIGHT RULES (IFR), FLIGHT PHASE (Cruise).
- Reporting:** REPORTING SOURCE (Employee), via (ERS - Online Report), ACKNOWLEDGMENT (Yes on Oct-03-2009), OPERATIONAL PROCESS (Maintenance QC).
- Equipment Table:**

EQUIPMENT TYPE	TAIL #	REG # or FLEET #	MANUFACTURER	MODEL	SERIAL #	ATA CODE
Aircraft	23	N908FX	ATR	42	02341007	3230 Landing Gear

EVENT OR HAZARD SUMMARY

Departed R33 YKM taking N908FX to GEG. Upon retracting the gear, the gear unsafe light illuminated. Tried recycling the gear - same problem and returned to YKM for maintenance to check. Landed without occurrence. Contacted dispatch and was released to take N368FX to GEG.

PSALERNO HAS LOGGED ON

This is the first of nine “tabs”, intuitively arranged from left to right in the order of data entry for IR’s various risk management processes. These nine tabs are used to record and track hazards, errors, safety concerns, incidents and other events. By clicking on a tab itself, users easily move from tab to tab, and blue navigation buttons near the top allow users to quickly navigate between screens. The record above is OPEN as indicated in red.

Users may enter data manually or import data with the *Import Records* command from an XML Data Source (such as a reporting form on your company website), from an Excel File (.xls), or from tab-separated or comma-delineated .txt files derived from electronic reporting forms created in MS WORD or in .pdf format. Data from IR may also be exported to these same formats.

NOTE:

An XML Data Source is XML code that is embedded into an HTML page. It requires the use of Microsoft’s XML Data Source Object (DSO), which is a Microsoft ActiveX control built into Internet Explorer 4 and higher. Using this object, it is possible to extract content from a web-based form and import the data into IR.

B. RECORD STATUS SUMMARY SCREEN

RECORD #	DATE OF EVENT	TYPE OF EVENT	CLASS OF EVENT	INVESTIGATION COMPLETED	CAP ACCEPTED BY	CAP ACCEPTED	RECORD CLOSED
RMR000014	Jun-18-2008	Cust. Service Concern	Quality	Jun-20-2008	Joyce Kohler	Jun-12-2008	Sep-09-2008
RMR000015	Jun-17-2008	Cust. Service Concern	Quality	Jun-23-2008	Don Condor	Jun-23-2008	Sep-09-2008
RMR000016	Jun-22-2008	Incident	Safety	Jul-22-2008	Wayne McCloskey	Aug-01-2008	Aug-01-2008
RMR000017	Jun-23-2008	Scheduling or Communication	Quality				
RMR000018	Jun-23-2008	Flight Delay	Quality	Jun-26-2008	Bob Leeland	Jun-26-2008	Jul-28-2008
RMR000019	Jun-26-2008	Hazard	Safety	Jul-16-2008	Jared Poser	Jul-16-2008	Jul-16-2008
RMR000020	Jun-26-2008	Accident (near)	Safety	Jun-26-2008	Wayne McCloskey	Jul-02-2008	
RMR000021	Jun-25-2008	Flight Delay	Quality	Jul-02-2008			
RMR000022	May-22-2008	Operational Process Deficiency	Safety	Jul-09-2008			

In the **Record Status Summary** Screen, administrators can quickly view the status of each record in the database. Closed records are displayed in green, and open records (those requiring action) are displayed in red. Records displayed in yellow tell database administrators that all risk controls have been completed, and that the record is ready to be closed. Clicking on a record number takes you directly to that record.

C. DETAILS TAB

On the **Details Tab**, a description of the event may be entered or imported from the original reporting source document. This screen also documents whether any immediate actions were taken, and if so, a description of those actions.

IR DATA ENTRY

Navigation buttons: PERSONNEL, EQUIPMENT, MANAGERS, ADMIN ONLY, IR DATA ENTRY, RECORD STATUS, COST DATA, COST REPORTS, DATA MINING.

Tabs: Incident, Details, Investigation / Root Causes, Risk Analysis, Corrective Action Plan, RC/CAs, Follow-ups, Lessons Learned, Images.

DETAILED DESCRIPTION OF EVENT AND HAZARD

New Maintenance shift tasked with rectifying some in progress snags. To troubleshoot snags engine runs were required. Aircraft was all closed up. Aircraft brought outside and engine starts carried out. Post engine run AME departed aircraft he could hear fuel pouring out of the RH Nacelle. There was a huge puddle of fuel on ground. Maintenance brought aircraft in hanger and opened RH engine cowling. RH engine fuel delivery line found loose with a piece of flagging tape attached. There was no information recorded anywhere to inform anyone of the loose line except if one might notice the flagging tape (only if cowling were opened). Task determined to be the cause of the loosened line " check RH aux fuel tank for possible leak" JC1103 NP. There was a hand written note on the bottom of task - " Needs to be leak checked". No mention of the loosened line found.

WAS IMMEDIATE ACTION TAKEN TO MITIGATE RISK? ☒ Yes ☐ No ☐ N/A

IS FURTHER ACTION REQUIRED TO MITIGATE RISK OR PRECLUDE A SIMILAR FUTURE OCCURRENCE? ☐ Yes ☐ No

Callout Box: Certain incidents or events (such as severe weather phenomena) may be beyond the control of your company to prevent a recurrence. In such cases the event may be recorded in IR, a "NO" answer provided to the question here, and the record closed. No further action is required.

D. INVESTIGATION TAB

On the *Investigation Tab*, assigned investigators record investigation notes and root causes. When due dates for the completion of tasks are not met, days remaining (displayed in black) become **days past due** and are displayed in red. Program controls prohibit closing of records for which all required tasks have not been accomplished. Open records always display in red.

Throughout IRv2, **reference tutorials** provide written guidance to users for proper accomplishment of the various risk management processes.

Here, users are assisted in their determination of root causes with a reference tutorial that explains the process and provides a basic example.

These reference tutorials greatly speed learning and result in higher quality process outputs from all users.

E. RISK ANALYSIS TAB

The **Risk Analysis** tab permits entering of risk statements and assessments of exposure, likelihood and severity, in order to determine **Relative Calculated Risk**. By assessing exposure, as well as likelihood and severity of the risk, more accurate risk assessments can be made than if likelihood and severity alone are used.

FileMaker Pro - [IR_Operators_Demo (OAGHOST)]

File Edit View Insert Format Records Window Scripts Help

IR DATA ENTRY

FIND MAIN SRM REPORT

PERSONNEL EQUIPMENT MANAGERS ADMIN ONLY

IR DATA ENTRY RECORD STATUS COST DATA COST REPORTS DATA MINING

Incident Details Investigation / Root Causes **Risk Analysis** Corrective Action Plan RC/CAs Follow-ups Lessons Learned Images

RISK STATEMENT(S) RMR000222

In flight mechanical problems/failures could lead to various emergency situations

RISK ASSESSMENT

EXPOSURE ☐ Continuously ☐ Very Often ☒ Often ☐ Hardly Ever ☐ Never

LIKELIHOOD ☐ Certain ☐ Extremely Likely ☐ Likely ☒ Unlikely ☐ Remote

SEVERITY ☐ Catastrophic ☒ Critical ☐ Major ☐ Minor ☐ Negligible

RELATIVE CALCULATED RISK: 39 (MODERATE)
MAY BE ACCEPTABLE, BUT ONLY WITH RISK-MITIGATING STRATEGIES; REQUIRES RISK CONTROLS AND/OR CORRECTIVE ACTIONS TO MITIGATE RISK.

ADD TO SAFETY-RISK PROFILE? ☒ Yes ☐ No **PROFILE REPORT**

RISK PRIORITY 2

ACTIVITY In-flight mechanical failure

OBJECTIVE reduce in flight mechanical problems/failures

GOAL improve aircraft and component reliability

MEASUREMENT fewer pilot reports per 100 hrs

File Edit View Insert Format Records Scripts Window Upgrade Help!

EXPLANATION OF RISK STATEMENTS Press the Enter key to

RISK STATEMENT DEVELOPMENT

When developing risk statements, examine the potential consequences associated with each identified hazard and develop a risk statement. Potential consequences should address all possible situational factors (such as weather, lighting, equipment, knowledge and experience) as well as the human errors, equipment failures or process breakdowns that could occur if the hazard is left unaddressed.

NOTE: Consequences should be considered in their worst credible state; e.g., "What's the worst possible outcome that could realistically occur?"

RISK ASSESSMENT AND RISK FACTORS

After risk statements have been developed (which include identified hazards and worst potential consequences), they are then analyzed and likelihood. When performing this risk analysis, levels of exposure, severity and likelihood may be affected by various contributing factors.

As an example, if a hazard is identified as forecast high winds and flight training is being conducted, the likelihood of an incident occurring could be high. Contributing factors might include wind gusts, runway closures, the experience of the instructor / student and the number of landings conducted (exposure). In another example, if a maintenance department hazard is identified as Suspected Unapproved Parts, contributing factors could include use of a new supplier, high turnover of contract maintenance personnel, or inadequate receipt inspection procedures.

Identification of contributing factors aids in risk assessment and provides specific targets for corrective action. Contributing factors are by a new employee, a non-standard operation, etc.) or deficiencies in systems, process design or performance (e.g., missing procedures or compliance with). Effective risk controls and corrective actions should address risk factors by eliminating them or by reducing their impact. Contributing factors may affect exposure to the hazard, the severity of potential consequences, and the likelihood of the consequence occurring.

This reference tutorial explains how to develop risk statements.

Here, users are instructed to consider **contributing risk factors** when performing risk assessment.

Identification of contributing factors aids in accurate risk assessment and provides specific targets for corrective action.

F. CORRECTIVE ACTION PLAN TAB

Responsibility for development of a Corrective Action Plan, or CAP (with assignment of due date), is recorded here. Appropriate managers may work individually or jointly on CAP development. The program permits multi-targeted CAPs for several departments, or for a global risk control or corrective action to be applied to all stations your company serves. In addition:

- ➔ Any substitute risks introduced by the CAP are recorded;
- ➔ Risk controls to mitigate substitute risks are developed and documented;
- ➔ An assessment of residual risk after CAP implementation is made;
- ➔ The CAP and residual risk are accepted by the appropriate risk-decision authority.

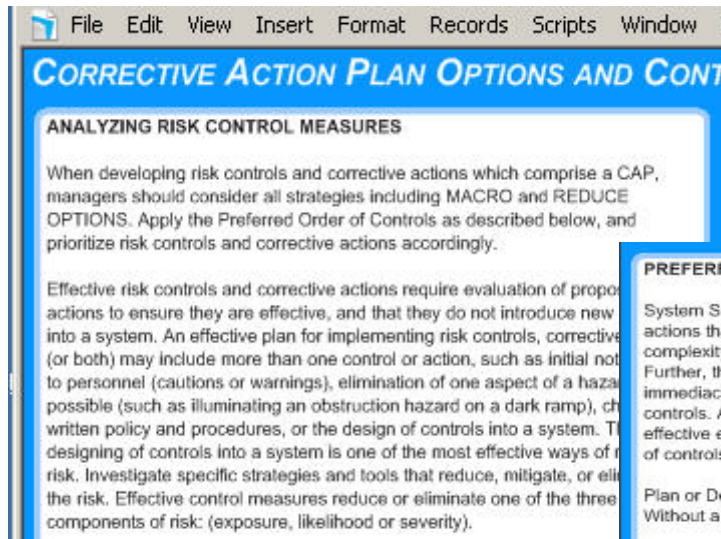
The screenshot displays the 'IR DATA ENTRY' window for the 'Corrective Action Plan' tab. The interface is divided into several sections:

- Navigation and Tools:** Includes a menu bar (File, Edit, View, Insert, Format, Records, Window, Scripts, Help) and a toolbar with buttons for FIND, MAIN, SRM REPORT, PERSONNEL, EQUIPMENT, MANAGERS, ADMIN ONLY, IR DATA ENTRY, RECORD STATUS, COST DATA, COST REPORTS, and DATA MINING.
- Tabs:** The 'Corrective Action Plan' tab is selected, with other tabs including Incident, Details, Investigation / Root Causes, Risk Analysis, RC/CAs, Follow-ups, Lessons Learned, and Images.
- CORRECTIVE ACTION PLAN (CAP):**
 - Incident Details:** Two text boxes with red 'X' icons. The first contains 'Lloyd Epstein to advise Airport Authority and ask about gate access for couriers.' The second contains 'Wayne McCloskey to implement ramp marshalling procedures with his staff to monitor the vehicle corridor prior to aircraft movement.'
 - PERSON RESPONSIBLE FOR CAP DEVELOPMENT:** A dropdown menu showing 'Wayne McCloskey' and a 'NOTIFY' button.
 - TITLE, DEPARTMENT:** A text box showing 'CP 703/704, Flight Operations'.
 - DATE BY WHICH CAP MUST BE DEVELOPED:** A date picker set to 'Jun-30-2008'.
 - DAYS LEFT/PAST DUE:** A text box.
 - CAP DEVELOPED:** A date picker set to 'Jul-02-2008'.
 - SUBSTITUTE RISKS INTRODUCED BY THE CAP:** A text box containing 'consider safety of ramp staff working in confined area when developing plan.'
- Overall Residual Risk Level After CAP Has Been Implemented:**
 - EXPOSURE:** Radio buttons for Continuously, Very Often, Often, **Hardly Ever** (selected), and Never.
 - LIKELIHOOD:** Radio buttons for Certain, Extremely Likely, Likely, **Unlikely** (selected), and Remote.
 - SEVERITY:** Radio buttons for Catastrophic, Critical, **Major** (selected), Minor, and Negligible.
 - Relative Calculated Risk of 22 (LOW):** A green box indicating the risk level.
 - MAY BE ACCEPTABLE WITHOUT FURTHER ACTION:** A green box indicating the risk level.
- Acceptance of CAP & Residual Risk by Appropriate Risk-Decision Authority:**
 - NAME:** A dropdown menu showing 'Lloyd Epstein'.
 - TITLE:** A text box showing 'Director of Flight Operations, Flight'.
 - ACCEPTED ON:** A date picker set to 'Jul-02-2008'.
 - CAP STATUS:** A green button labeled 'LOCKED'.

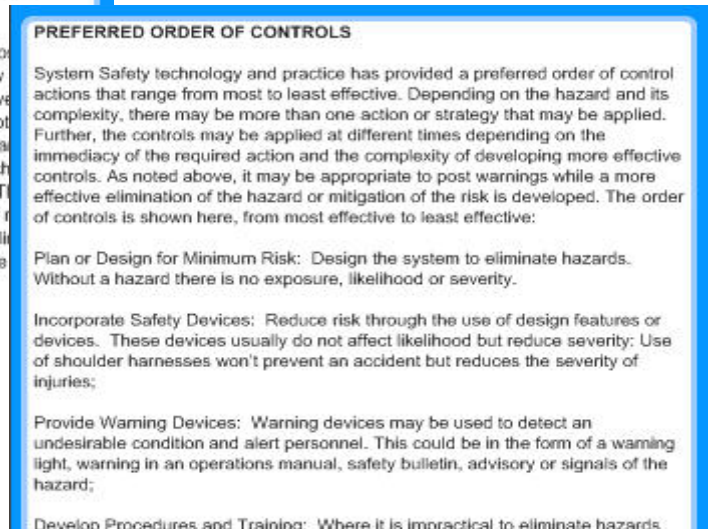
Program controls prohibit administrators from "locking" a cap until all investigation, risk analysis and Corrective Action Plan data is entered. Residual risk must also be assessed and the name and title of the person accepting the CAP must be entered. CAP LOCK further serves as its own control:

- ➔ To preserve the integrity of all data recorded as a result of investigation, risk assessment and Corrective Action Plan development processes;
- ➔ To assure the person accepting the CAP (such as a senior accountable executive or regulator) that the plan will be followed as presented.

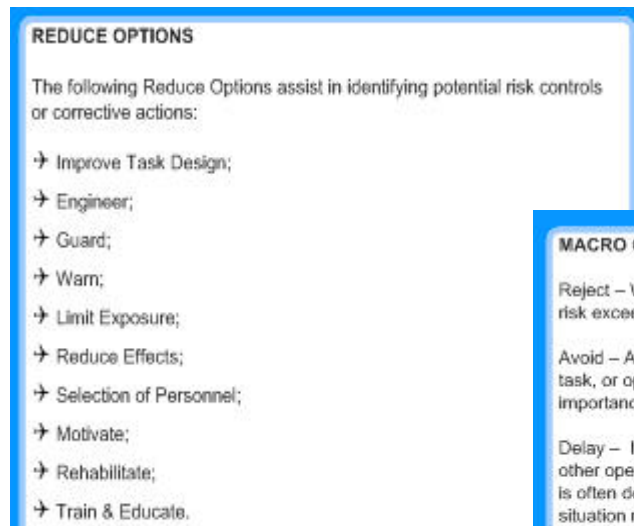
Corrective Action Plan development, assessment of substitute risks, assessment of residual risk, and CAP acceptance by the appropriate risk-decision authority are not complex processes, but unless managers receive adequate training and have ready access to written guidance, process outputs may lack quality.



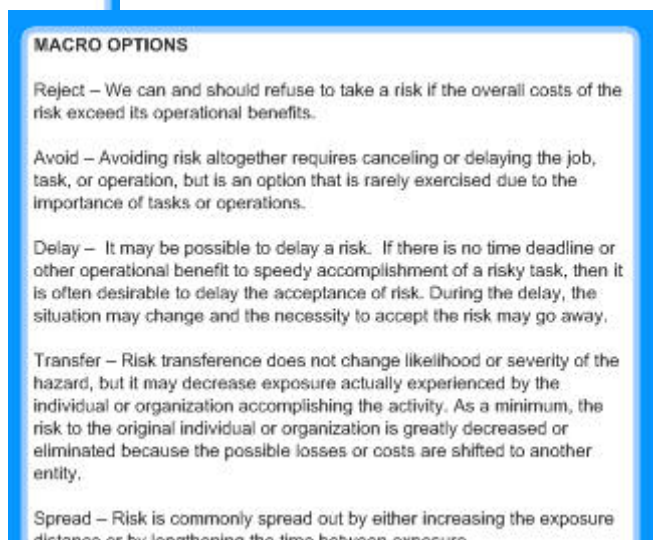
Again, users are assisted in their development of a quality Corrective Action Plan with the help of reference tutorials such as the one at left for analyzing risk control measures.

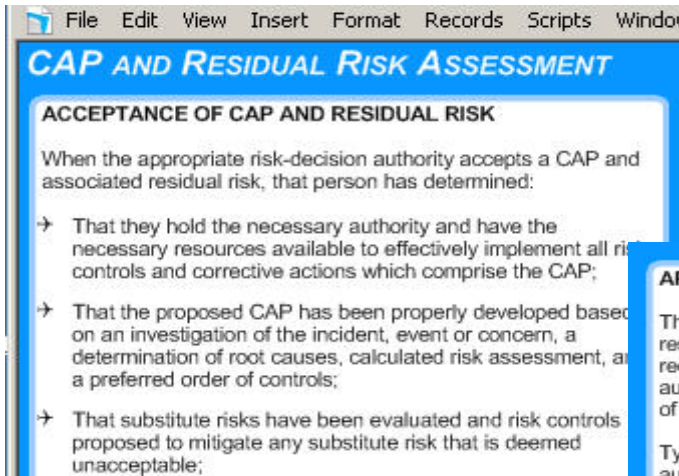


This reference tutorial explains how to use a **preferred order of controls** when developing individual risk controls and/or corrective actions that comprise the CAP.

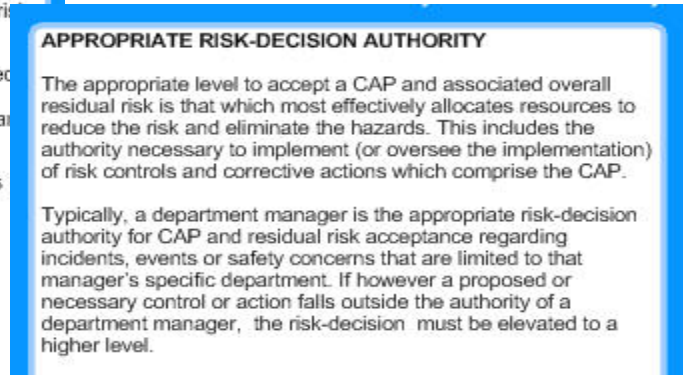


Macro options and reduce options are also provided to assist users in their development of effective risk controls and corrective actions.





For a Corrective Action Plan to be effective, it should be accepted by the **appropriate risk-decision authority**. These reference tutorials explain to all users how this essential risk management process works, when they may accept a CAP, and when it should be elevated to a higher level of authority.



G. RISK CONTROLS / CORRECTIVE ACTIONS TAB

Risk controls and corrective actions are automatically broken out of the CAP and populate the RC/CAs Tab as separate controls or actions (shown in blue text). Additional details are then added to each control or action and assignments made to appropriate managers (or vendor points-of-contact) for implementation.

IR DATA ENTRY

FileMaker Pro - [IR Operators Demo (OAGH05T)]

File Edit View Insert Format Records Window Scripts Help

IR DATA ENTRY **RECORD STATUS** **COST DATA** **COST REPORTS** **DATA MINING**

Incident Details Investigation / Root Causes Risk Analysis Corrective Action Plan RC/CAs Follow-ups Lessons Learned Images

RISK CONTROLS / CORRECTIVE ACTIONS RMR000247

DESCRIPTION OF RC/CA AND PRIORITY 2

Inform pilots to remind passengers to be aware of the spar step.

RC/CA DETAILS

Crew in question sent an e-mail.
J-31 crews notified by Ascent memo.

THIS RC/CA ASSIGNED TO

Robert McCauley **NOTIFY**

TITLE, DEPT. / VENDOR

Standards Officer, Safety

DUE DATE Jan-16-2009 **DAYS LEFT / PAST DUE** 268

COMPLETED ON

DESCRIPTION OF RC/CA AND PRIORITY 2

Maintenance Job card created to inspect and correct any visibility issues with the spar cover.

RC/CA DETAILS

Maintenance repaired spar cover, painted and refinished spar cover with high visibility tape.

THIS RC/CA ASSIGNED TO

Brent Fenster **NOTIFY**

TITLE, DEPT. / VENDOR

Maint Planning, Maintenance

DUE DATE Jan-16-2009 **DAYS LEFT / PAST DUE**

COMPLETED ON Jan-20-2009

100 Browse

H. FOLLOW-UPS TAB

On this tab, responsibilities for monitoring of risk controls are assigned. IRv2 permits users to record as many risk controls and corrective actions as are necessary to effectively mitigate risk. All RC/CAs (in blue text) and associated details are again mirrored here for monitoring and follow-up.

Vendors and sub-contractors may also be assigned risk controls or corrective actions, as is necessary when a vendor audit produces unsatisfactory results. Provisions are made in IRv2 for recording the vendor's company name and Point-of-Contact, who is often the appropriate person to monitor a risk control that has been assigned to that vendor.

Follow-up audits are performed by the Director of Safety or trained company auditors to ensure that each risk control or corrective action conforms to specified standards, and is effective. Audit results and notes are recorded here. Audit Finding Reports (AFRs) may also be referenced and attached to an individual record on the **Images Tab**.

Note:

IRv2 contains built-in controls that prohibit closing of a record unless all tasks have been completed and all follow-up audit results have been recorded as satisfactory.

I. LESSONS LEARNED TAB

On this tab, responsibilities for communication of lessons learned are assigned, including communication methods, recipients and due dates.

Communication of lessons learned may be part of a Corrective Action Plan to control risk, or to share lessons learned with personnel or industry. Through this sharing of information, your company's risk management efforts may help others in their development of effective risk controls, and in preventing an accident.

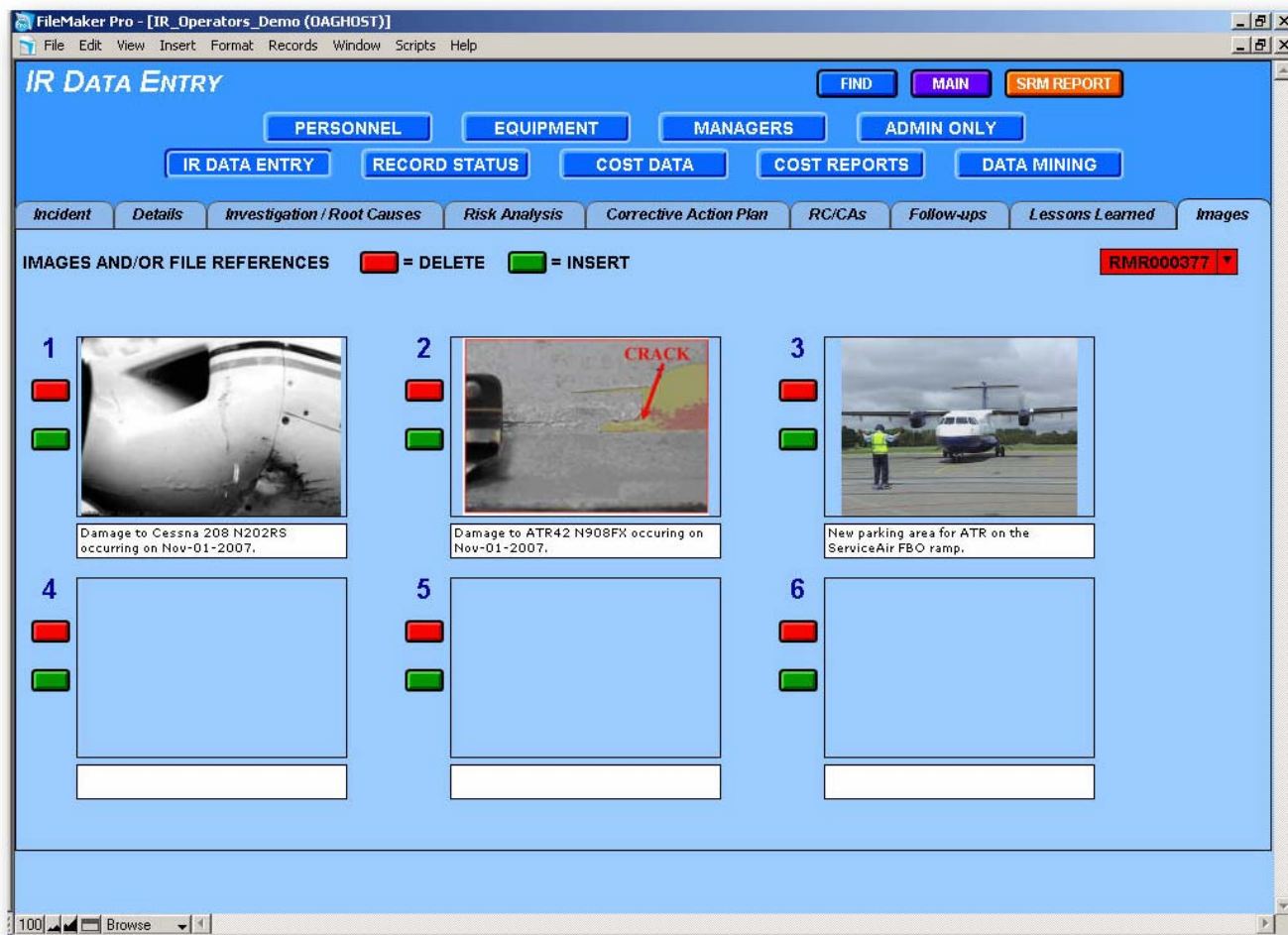
Submission of injury reports to OHS/OSHA, completion of voluntary disclosures to regulators and submission of comprehensive fixes, reports of suspected unapproved parts, and operational difficulty or mechanical reliability / interruption summary reports are but a few examples of communications that may be assigned and tracked in the IR database.

Operators may also choose to share lessons learned with industry trade associations or other operators of like equipment, to enhance safety not only within the company, but throughout the industry.

Communication of lessons learned also serves to promote the company's Safety Management System by demonstrating to all personnel that the system is working and producing positive results.

J. IMAGES TAB

Up to six images and/or file references may be added or linked to each record.



Examples of reference files that may be attached include:

- ➔ Original source documents such as reporting forms;
- ➔ OHS / OHSA reports;
- ➔ Audit Finding Reports;
- ➔ NASA ASRS reporting forms;
- ➔ Voluntary Disclosures;
- ➔ Mechanical Reliability / Mechanical Interruption Summary reports
- ➔ Flight Data Monitoring / Flight Operations Quality Assurance reports
- ➔ Continuing Analysis and Surveillance reports
- ➔ Cost estimates or bids;
- ➔ Invoices for work performed;
- ➔ Insurance claim forms.

7. REPORTS

A. SRM PROCESS REPORT

The Safety Risk Management Process Report captures the status of a record at any time during the life of the record, through all applied SRM processes, and produces a report in .pdf format which may be printed and taken to meetings, used for internal audit purposes, or emailed as an attachment. All information pertaining to the associated record is captured by the report. The SRM Report automatically updates as information is added to the record.

Record Number: RMR000368	
SRM PROCESS REPORT	
EVENT	
Date of Event: Oct-01-2009, 7:30 UTC	Record Opened: Oct-03-2009
Type: Flight Interruption	Reporting Source: Employee
Class: Quality	
Airport: BFI	Reported Via: ERS - Online Report
Location: Taxiway	Acknowledgement Sent to Originator: Oct-03-2009
Mission: Charter	PIC: Turcanik, Clint
Flight Rules: IFR	SIC: Wright, James
Flight Phase: Cruise	
Flight #: 6335 PAX: 32	F/A: Yip, Karen
Weather: Icing Conditions Visibility: 1 Mile	ACM: N/A
OPERATIONAL PROCESS: Maintenance QC	
EQUIPMENT INVOLVED	
Tail # — Registration # — Equipment Type — Manufacturer — Model # — Serial # — ATA Code	
23 — N908FX — Aircraft — ATR — 42 — 02341007 — 3230 Landing Gear Retract/Ext. System	
EVENT OR HAZARD SUMMARY	
Unsafe gear indication resulted in air turnback.	
DETAILED DESCRIPTION OF EVENT / HAZARD	
Departed R33 YKM taking N908FX to GEG. Upon retracting the gear, the gear unsafe light illuminated. Tried recycling the gear - same problem and returned to YKM for maintenance to check. Landed without occurrence. Contacted dispatch and was released to take N368FX to GEG.	
WAS IMMEDIATE ACTION TAKEN TO MITIGATE RISK? Yes	
IMMEDIATE ACTION(S) TAKEN	
Recycled gear; returned for landing.	
IS FURTHER ACTION REQUIRED TO MITIGATE RISK?	
INVESTIGATOR(S) (TITLE / CO.)	
Brent Fenster, (Maint Planning, Maintenance)	
RECORD IS STILL OPEN	
Printed: 11-Oct-2009	RMR000368
Page 1 of 1	

B. SAFETY RISK PROFILE REPORT

The Safety Risk Profile Report may be accessed from any record in the IR database, and produces a report in .pdf format which may be printed and taken to meetings, or emailed as an attachment. This report lists the ten or twelve highest-risk activities in which the company engages, and includes responsibilities for risk controls to mitigate risk.

SAFETY RISK PROFILE	
(Significant Safety Issue List)	
Record Number: RMR000222	Priority: 2
ACTIVITY: In-flight mechanical failure	
RISK ASSESSMENT: Calculated Risk: Likelihood = Unlikely / Severity = Critical / Exposure = Often—Relative Calculated Risk: 39 (Moderate)	
RISK CONTROLS:	
<i>Monitoring of maintenance related Cadors [Priority Level: 3]</i>	
Assigned to: Brent Fenster	Due: Completed:
Details: Maint. Planning will monitor and distribute applicable CADORS info.	
Monitoring Assigned to: Brent Fenster	Title, Dept. or Vendor: Maint Planning, Maintenance
Monitoring Description: CADORS to be reviewed weekly and pertinent info. disseminated to all concerned maint. personnel	
<i>Reliability analysis program adherence by QA [Priority Level: 3]</i>	
Assigned to: Jared Poser	Due: Completed:
Details: QA will follow weekly requirement for reliability analysis	
Monitoring Assigned to:	Title, Dept. or Vendor:
Monitoring Description:	
<i>Training program review and implemented in next budget year</i>	
<i>Duties and responsibilities of floor supervisors clarified and implemented - training and oversight [Priority Level: 2]</i>	
Assigned to: Dennis Golf	Due: Completed:
Details: TBD	
Monitoring Assigned to:	Title, Dept. or Vendor:
Monitoring Description:	
<i>Maint management - responsibilities and reporting structure changed [Priority Level: 3]</i>	
Assigned to: Jared Poser	Due: Completed:
Details: Under development	
Monitoring Assigned to:	Title, Dept. or Vendor:
Monitoring Description:	
OBJECTIVE: reduce in flight mechanical problems/failures	
GOAL: improve aircraft and component reliability	
MEASUREMENT: fewer pilot reports per 100 hrs	
<hr/>	
Printed: Oct-11-2009	Page 3 of 8

C. CLL REPORT

The Communication of Lessons Learned Report may be accessed from any record in the IR database, and produces a printable report using select data from the record being viewed. This includes the event summary and details, investigation notes, root causes, and risk controls to prevent reoccurrence. The CLL Report may be printed and posted, attached to an email, or embedded in a company memo.

Record Number: RMR000020

COMMUNICATION OF LESSONS LEARNED

EVENT

Date of Event: Jun-26-2008, 19:22 LCL
Type: Accident (near)
Class: Safety

OPERATIONAL PROCESS: Ground Handling

EVENT OR HAZARD SUMMARY

Near collision between Purolator van and ATR.

DETAILED DESCRIPTION OF EVENT / HAZARD

N3422Y was departing when a unmarked UPS cub van cut in front of him causing him to slam on his brakes. The van also tried to stop but realized that if he did he would definitely be hit by the ATR. He then continued past.

IMMEDIATE ACTION(S) TAKEN

I drove over to Purolator and stopped the driver making sure he realized how close he was to causing a very major accident. I explained that if the beacon lights are on and both props are moving the a/c has the right of way.

INVESTIGATION NOTES

Discussed this with David Helander. Walked out to the ramp to get a better picture of layout. ATR's were parked with their noses facing North. ATR involved was furthest to the east with at least one on it's left side. Engine start completed and "thumbs up " given by ramp staff who then moved to area behind aircraft as there is not room to safely marshall the aircraft forward.

Pilots view to the west likely blocked by the other aircraft and a clear view not available until moving forward. Likewise the view of the van driver would be of the other aircraft not yet running.

Ramp congestion in the morning is compounded by the roadway at the north end of the ramp.

ROOT CAUSE(S)

Ramp congestion on the north ramp compounded by the roadway which must be left clear for access vehicles. Requests have been made to have courier traffic access Purolator via ground side vs. air side. Airport Authority to establish access has not been completed.

INDIVIDUAL RISK CONTROLS / CORRECTIVE ACTIONS (RC/CAs)

Wayne McCloskey to implement ramp marshalling procedures with his staff to monitor the vehicle corridor prior to aircraft movement. [Priority Level: 1]

Details: Make sure staff are aware of new procedures to ensure road traffic is clear prior to aircraft departures

Lloyd Epstein to advise Airport Authority and ask about gate access for couriers. [Priority Level: 2]

Printed: Nov-12-2009

RMR000020

Page 1 of 2

8. TREND ANALYSIS AND COST REPORTS

Clicking on **Data Mining** from the main screen takes users to the Data Mining screen:

DATA MINING

ALL CLOSED ALL OPEN SHOW ALL FIND CONSTRAIN

PERSONNEL EQUIPMENT MANAGERS ADMIN ONLY

IR DATA ENTRY RECORD STATUS COST DATA COST REPORTS DATA MINING

EVENT DATA

TYPE OF EVENT: safety - workplace / facilities
 DATE OF EVENT: Sep-26-2008
 TIME (12H): 8:30 LCL / UTC LCL
 RECORD #: RMR000163 CLOSED
 DATE RMR OPENED: Sep-26-2008
 DATE RMR CLOSED: Jan-23-2009
 REPORTING SOURCE: AME apprentice
 REPORTED VIA: Online Report
 ACKNOWLEDGMENT: Yes
 ACK SENT DATE: Sep-26-2008
 MISSION:
 FLIGHT #: PAX #
 FLIGHT RULES:
 AIRPORT:
 LOCATION:
 WEATHER:
 VISIBILITY:
 EVENT SUMMARY: Northeast Fire extinguisher in
 EVENT DESCRIPTION:
 IMMEDIATE ACTION:
 ACTION TAKEN: Ramp was informed
 OPERATIONAL PROCESS:
EQUIPMENT INVOLVED
 REGISTRATION #: TAIL #
 MANUFACTURER:
 EQUIPMENT TYPE:
RISK ANALYSIS
 RISK STATEMENTS: Lack of access could impact timely
 EXPOSURE: Hardly Ever
 LIKELIHOOD: Unlikely
 SEVERITY: Minor
 RA CALC: Relative Calculated Risk: 9 (Low)
SAFETY RISK PROFILE
 RISK PRIORITY:
 ACTIVITY:
 OBJECTIVE:
 GOAL:
 MEASUREMENT:
CORRECTIVE ACTION PLAN
 CAP TEXT: Ramp staff responsible to assist in
 PRSN RESPONSIBLE: David Whiten
 TITLE, DEPT.:
 DUE DATE: Dec-09-2008
 DEVELOPED: Dec-02-2008
 SUBSTITUTE RISK: none
 EXPOSURE: Often
 LIKELIHOOD: Unlikely
 SEVERITY: Major
 RR CALC: Relative Calculated Risk of 28 (Low)
 CAP ACCEPT NAME: Greg Knowlton
 CAP ACCEPT TITLE:
 CAP ACCEPT DATE: Dec-02-2008
RISK CONTROLS / ACTIONS
 RC/CA PRIORITY:
 RC/CA DETAILS: David, please issue a memo or speak
 ASSIGNED TO: David Whiten
 TITLE, DEPT.:
 DUE DATE: Dec-09-2008
 COMPLETED ON: Dec-16-2008
FOLLOW-UP AUDITS
 MONITORING ASSIGNED TO: David Whiten
 TITLE, DEPT.:
 MONITORING DESCRIPTION:
 FOLLOW-UP AUDIT BY: David Whiten
 TITLE, DEPT.:
 AUDIT DESCRIPTION: Ramp staff have been informed of
 AUDIT DUE DATE: Dec-25-2008
 AUDIT PERFORMED ON: Dec-16-2008
 AUDIT SATISFACTORY: Yes
 FOLLOW-UP AUDIT NOTES:
LESSONS LEARNED
 ASSIGNED TO: Jim Whales
 TITLE, DEPT.:
 RECIPIENT: Chris Goldfinger
 METHOD / MESSAGE: Jim, please review this RMR with
 DUE DATE: Dec-28-2008
 COMPLETED DATE: Jan-20-2009

A. TREND ANALYSIS

One of the most powerful features of Incident Reporter v2 is the program's ability to identify trends by any parameter, such as:

- ➔ Airport / Location
- ➔ Equipment type / Manufacturer / Model number / Tail number
- ➔ Aircraft System / ATA code
- ➔ Type of event / Class of event
- ➔ Mission / Operational Process
- ➔ Department / Vendor

Search for a manager's name, title, or department to identify records in the database that pertain to a specific manager, title, or department. These finds are used during Safety Assurance processes of internal audits and evaluations, to identify all risk controls that pertain to a specific department.

B. GRAPHS , PIE AND BAR CHARTS

Use IR's powerful find commands (including multiple constrained finds) in the Data Mining screen, or in any field throughout the program, to drill down and find exactly the data you're looking for. Then export selected fields to Excel for creation of pie / bar charts and other graphical representations of data.

C. STATISTICAL CONTROL CHARTS

After finding specific data within IR over various time frames, selected fields may be exported to Excel. Using an inexpensive add-on program such as [SPC for Excel Software](#), a variety of statistical tools can be utilized for data analysis, including:

- ➔ Pareto diagrams
- ➔ Histograms
- ➔ Attribute Control Charts
- ➔ Variable Control Charts

...and many more. Visit **BPI Consulting, LLC** online for more information and training regarding the use of Statistical Control Charts.

D. COST REPORTS

Clicking on *Cost Reports* takes users to the Cost Reports Switchboard. Here, Cost Reports may be sorted by cost type or record number within a specific date range.

The screenshot shows the Incident Reporter v2.0 interface. The 'COST REPORTS SWITCHBOARD' window has tabs for 'IR DATA ENTRY', 'SUMMARY REPORTS', 'COST DATA ENTRY', 'COST REPORTS', and 'VALUE LISTS'. The 'COST REPORTS' tab is active, showing a 'COST REPORT BY...' section with radio buttons for 'ALL' and 'ONE', and dropdown menus for 'COST CATEGORY', 'COST TYPE', 'DATE RANGE', and 'RECORD NUMBER'. Below this is a printed report titled 'COSTS BY COST TYPE'.

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COSTS BY COST TYPE

COST DATE	RECORD #	COST AMOUNT	NOTES
Aircraft Repair Outsourcing (2)			
Sep-17-2009	RMR000001	350.00	Re: Invoice #28959 for avionics shop to perform <i>in situ</i> tests.
Aug-04-2009	RMR000003	320.00	Re: Invoice #AR007314 from AMS for C-208 wing repair
		\$ 670.00	
GRAND TOTAL		\$ 670.00	

E. COST DATA ENTRY

Costs associated with a safety-related event are entered in the Cost Data Entry screen. Management may assign user access to one or more persons in accounting, in order to enter cost data associated with incidents or other events.

Cost *types* are tailored to each company's accounting system with the same user-customized value lists provided for IR Data entry (see value lists below).

Costs may be categorized further as *direct* or *indirect*. indirect costs are non-quantifiable, and may be related to the company in general, a specific department, station or an individual employee. Management may want to record such information to get a better picture of the true impact of an incident or other irregularity. Examples of indirect costs might include the loss of a customer due to a failure to meet minimum performance standards, or lost productivity or wages by personnel.

	COST TYPE / NOTES	COST CATEGORY	RECORD #	DATE	AMOUNT
1 of 3	Productivity of Employees Lost Loss of our lead avionics tech. for 2 weeks; Two weeks' accrued sick leave lost by the avionics tech. who broke his wrist.	Indirect	IR00002	01-Jul-2007	
2 of 3	Aircraft Repair Labor Overtime required for two shifts due to scheduling difficulties with contracted avionics shop to perform <i>in situ</i> avionics inspections.	Direct	IR00002	01-Nov-2007	\$ 456.00
3 of 3	Aircraft Repair Outsourcing Re: Invoice #289959 for avionics shop to perform <i>in situ</i> tests.	Other	IR00002	05-Aug-2007	\$ 350.00

9. ADDITIONAL RESOURCES

The following white papers and resources contain additional information regarding Incident Reporter:

- ➔ OAG Quality SMS
- ➔ Online Reporting with IR
- ➔ Incident Reporter Demonstration Video

Contact Susan Tolle at 1+206.949.1470 for copies of these white papers,
or visit Omni Air Group online at www.omniairgroup.com

10. FREQUENTLY ASKED QUESTIONS

“Why should I choose Incident Reporter as my SMS risk management software?”

Because Incident Reporter:

- ➔ Is powerful, fast, and easy to learn;
- ➔ Can be accessed via web browser from anywhere in the world;
- ➔ Requires no IT resources and can be set up in less than a week;
- ➔ Serves as an Employee Reporting System and risk / quality management database;
- ➔ Has built-in controls to ensure the completion and recording of all risk management activities;
- ➔ Contains **reference tutorials** to ensure consistent quality of risk management processes;
- ➔ Has powerful data mining and export functions for trend analysis and pie / bar charts and graphs;
- ➔ Allows you to attach documents and images to records, and track costs;
- ➔ Constantly saves your data so even if your system shuts down, your records are safe and intact;

“Is there a trial version of IRv2 available?”

Yes! A free 30-day trial version of IR is available, hosted on OAG's secure servers. The trial version is fully functional with online reporting and email notifications, so you can see how IR can streamline your reporting, communication and responsibility assignment processes.

“How much does Incident Reporter™ cost?”

Incident Reporter is offered as part of the OAG Quality SMS for only \$500.00 per month. Call Susan Tolle at 1+206.949.1470 for more information regarding Incident Reporter.

“How is the support;...what else is included?”

- ➔ IRv2 connects to a full-color online User Manual (also available for download from omniairgroup.com);
- ➔ Lifetime support and upgrades are included at no additional cost;
- ➔ Online training (included) teaches your people fast and effective use of the program;
- ➔ Continued telephone and email support is offered for the life of all IR products.

Omni Air Group also offers professionally developed SMS Manuals and online SMS training for personnel and managers. Call us to find out how we can help you ensure the success of your SMS.

“What about tech support?”

We're responsive. If you send an e-mail you'll receive a response back within a day; call and you'll either receive an answer on the spot or if an answer isn't readily available, we'll get one to you as soon as possible (usually within one business day). We're available by phone from 8:00 am to 4:30 pm pacific time, here on the west coast of the United States.

“What's your contact info?”

Susan Tolle, Director Sales and Marketing Tel. 1+206.949.1470 Susan.Tolle@omniairgroup.com

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