

Guide for Managers



December 19, 2021

Guide for Managers

Welcome to Compatica!

Compatica helps your organization minimize workplace risk, injuries and illnesses, and significantly reduce worker's compensation expenses.

We record all workplace safety incidents, whether or not they result in injury or illness. We provide a framework that ensures that “no-injury” incidents—Safety and Damage Incidents--are resolved quickly, and that incidents that result in injury or illness are handled correctly and efficiently with minimal lag.

Let's take a quick run through the home page.

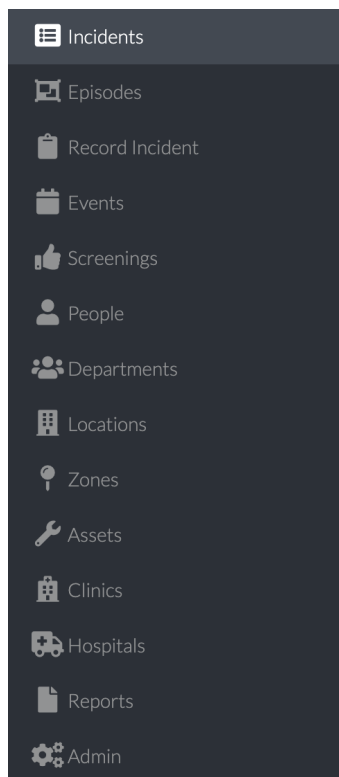
First logon at: <https://live.compatica.net>

Now enter your email and password.

Compatica Home Page

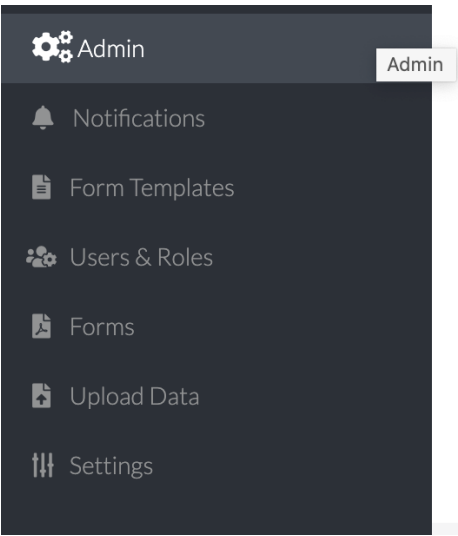
The default home page is the Incident Dashboard.

On the left, you'll see the Compatica navigation panel. You can minimize and maximize that panel by clicking this:  For now, maximize so that you can read the Navigation option:



Our first step is to complete the set up. Select “Admin - Settings”.

Admin-Settings



Organization Profile

The first tab is the Organization Profile. We will return to this page later. However, it is essential that this page is completed as it includes all of the non-incident specific data that Compatica can include in incident reports—including FROIs, OSHA Reports, and any custom reports that you may generate.

Please check you User Permissions – they should all be enabled, as in the following image:

Records

Asset:	Read/Write/Delete ▼
Clinic:	Read/Write/Delete ▼
Department:	Read/Write/Delete ▼
Episode:	Read/Write/Delete ▼
Events:	Read/Write/Delete ▼
Follow-Ups:	Read/Write/Delete ▼
Form:	Read/Write/Delete ▼
Hospital:	Read/Write/Delete ▼
Incident:	Read/Write/Delete ▼
Location:	Read/Write/Delete ▼
Notifications:	Read/Write/Delete ▼
Organization Profile:	Read/Write/Delete ▼
Person:	Read/Write/Delete ▼
User:	Read/Write/Delete ▼
Zone:	Read/Write/Delete ▼

Functions

Download Documents:	Yes ▼
Email Documents:	Yes ▼
Upload Documents:	Yes ▼
Generate Forms:	Yes ▼
Edit Form Templates:	Yes ▼
Bulk Upload Data:	Yes ▼
Change Organization Preferences:	Yes ▼
Access Screenings:	Yes ▼

Update

Upload Data

Let's select the "Upload Data" tab on the right-hand side.

Bulk Add Employees

Instructions

Create multiple employees in one action, by uploading a CSV file of the desired employees

Make sure the table includes *at least* the following information:

- First Name
- Last Name
- Sex
- Date of Birth
- Employee ID

It is okay if other information is in the CSV file. You will have a chance to tell us what each field represents or if you want to even include it at all

Our system can also handle:

- SSN
- Marital Status
- Date of Hire
- Date of Current Job
- Pay Rate
- Street Address
- City
- State/Province
- Zip/Postal Code
- Phone Number
- Email
- Job Title
- Job Description

File:

no file selected

Person Upload uploads your Persons from a CSV file.

Use it now—this is a very quick and efficient way of getting the Person database up and running.

You can refresh the database as new Persons are recruited by your Organization or as certain information about Persons change. For example, a new upload of the Persons will recognize that someone has changed his or her last name (such as when he or she gets married), or if the Person has a new job title and/or job description.

The uploader requires that your CSV file includes (at least) Person's:

- first name
- last name

- sex
- date of birth
- Person ID.

Provided the last three do not change in any Person update, the update will be completed automatically. If a Person's sex, date of birth, or Person ID changes (perhaps because a mistake was made in the original data), the change needs to be made manually for that record.

If you wish to create Users from the uploaded Persons' record, please make sure to include their email address in the uploaded data, as their email address is their login identifier.

To Upload a Person File:

Choose the File to Upload, and then click: "Upload".

The uploading process takes a few seconds.

Required Fields ▾

☒ First Name

☒ Last Name

☐ Sex

☒ Date of Birth

☐ Employee ID

Submit

Show 10 ▾ entries

Previous

1

2

3

4

5

...

50

☒	--Ignore this Column-- ▾	First Name ▾	Last Name ▾	Middle Initial ▾	SSN ▾	Marital Status ▾	Date of Birth ▾
☒	id	first_name	last_name	Middle Initial	ssn	marital_status	date_of_birth
☐		Sylvia	Yang	E	223-45-9876	m	3/27/1955
☐		Cynthia	Chin		210-33-9844	s	1/27/1990
☐		Margaret	Tulley	H	017-55-3588	s	4/22/1959
☐		Seema	Sharma	J	331-43-2891	s	7/14/1974
☐		Christina	Yee		019-44-3790	m	4/5/1976

In the example, there is a header. If your data also has a header, leave the default option of ignoring the first line. If it does not, uncheck the first line, so that the first Person is included.

Now map the field name in the drop down to the field in the column. As you do so, you will see that the "Required Fields" turn from Red to Green. Once they are all green you have the essential columns selected to enable the importing of the data.

Select "Submit". Note the importer imports data that is included in the dropdowns. Any data that you want to add to a Person's record that is not imported by the Importer must be added manually.

Having imported the Persons, you can select the Person icon on the left side. You will see the imported Persons:

Show 10 entries

Search:

ID	First Name	Last Name	Status	SSN	Marital Status	Date of Birth	Date of Hire	Job Title
78955431	Sylvia	Yang	Active	9876	Married	Mar 27 1955	Sep 23 1990	Packager - Manual
78955432	Cynthia	Chin	Active	9876	Married	Jan 27 1990	Jan 7 2013	Finishing and Shipping Specialist
78955433	Margaret	Tulley	Active	9876	Married	Apr 22 1959	May 2 1986	Quality Control Specialist
78955434	Seema	Sharma	Active	9876	Single	Jul 14 1974	Sep 8 2011	Painter - Industrial
78955435	Christina	Yee	Active	9876	Single	Apr 5 1976	Aug 11 2008	Quality Control Manager
78955436	Albert	Yu	Active	9876	Single	Mar 4 2067	Sep 10 1979	Painter - Industrial

To inspect a Person's record, click on the Person ID and the Person record will be displayed. To see the Person record on a single page, select "Update".

You will see all the Person data currently stored in the database.

Update Person

Email:
Add User Credentials
Delete User Credentials

Person Type:
Employee

First Name:
Peter

Middle Name/Initial:
Z

Last Name:
Yang

Sex:
Male

ID:
7989334

SSN:
016-88-7893

Marital Status:
Single

Date of Birth:
03/27/1955

Date of Joining Organization:
09/23/1990

Date of Current Position:
08/23/1992

Supervisor:

Position Title:
Packager - Manual

At this point you can verify that all the information in the Person record is correct, complete any data that is missing. Some of this data is specific to Compatica—for example, there are multiple Person "types".

Users & Roles

User Credentials are comprised of the Person's email address, and a password of their own selection.

Some Persons have special privileges and roles within Compatica. You will have a number of Users (or "Recorders") whose access to Compatica is through the Incident Recorders. In addition, you will have a smaller number of Managers. These are the individuals with access privileges to both the Incident Recorder and the Incident Manager.

While a Supervisor is unlikely to have any access privileges to the Incident Manager, they will still need to be given credentials to log into the Incident Recorder.

In addition, all the Managers, those with access privileges to both the Incident Recorder and Incident Manager, will require credentials, as well as some level of access control to data and forms in the system.

Starting with “Roles”

Roles describe the default set of privileges for a class of user. These users could include Systems Administrator, HR Manager, Safety Manager, Supervisor, etc.

Name		Permissions
☐	Admin	Permissions ↗
☐	HR Manager	Permissions ↗

In this example, we have listed two roles: and Admin and an HR Manager. If we want to add a new Role, simply click “Add”:

Add Permission Template

Name

Safety Director

Close

Submit

So, we’re going to add a “Safety Director”. Now click “Submit” and when you see the panel click “Permissions”

You can now define the privileges that are appropriate in your Organization as the Role Permissions for a Supervisor. Under each section under Records, select whether a Supervisor should have No Privileges, “-“, meaning that he can’t see the entries at all; “Read Only” access; Read and Write privileges; or whether he can Read, Write, and Delete.

Role Permissions: Supervisor

Records

Asset:	Read/Write
Clinic:	Read/Write
Department:	-
Episode:	-
Events:	Read/Write
Follow-Ups:	Read/Write
Form:	Read/Write
Hospital:	Read/Write
Incident:	Read/Write
Location:	Read/Write
Notifications:	Read/Write
Organization Profile:	Read
Person:	Read/Write
User:	Read
Zone:	Read/Write/Delete

Functions

Download Documents:	No
Email Documents:	Yes
Upload Documents:	No
Generate Forms:	Yes
Edit Form Templates:	No
Bulk Upload Data:	No
Change Organization Preferences:	No
Access Screenings:	No

Update

Note, as you will see below in “Users”, these are simply the default privileges for that Role; you can make any changes you see fit for any individual with that Role.

Once you are satisfied with you list, click “Update” to save that profile, and you will be returned to the Settings page.

Name	Permissions
☐ Admin	Permissions
☐ CEO	Permissions
☐ Foreman	Permissions
☐ HR Director	Permissions
☐ Nurse	Permissions
☐ Safety Director	Permissions
☐ Supervisor	Permissions

Add

Delete

Users

Users are Persons with credentials—meaning whether they are users of Compatica Incident Recorder and have specific privileges to the Incident Manager. To Add a User, select Add User

×

Add User

Person

Banks, Jason (17989353)
 ▼

Role

-
 ▼

Close
Submit

Select the Person from the scrolling list and choose a Permission Template—these are the default permissions that you have granted for a specific role. Every Person with that Role has, by default, the same Permissions. Only Persons who have an email address defined in their Person Record **and** who are not already a credentialed User will display on the list.

Users & Roles

Users
Roles

ID	Name	Username/Email	Role		
☐ 15957	Lamont Ballard	LBallard	Admin	Reset Password	Permissions
☐ 15936	Cynthia Chin	CChin	Supervisor 2	Reset Password	Permissions
☐ 21957	Amenadav Feinstein	adee.feinstein@gmail.com	None	Reset Password	Permissions
☐ 21986	Amenadav Feinstein	adee@secondgearsales.com	None	Reset Password	Permissions
☐ 15959	Conrad Smith	ConradSmith	Custom	Reset Password	Permissions
☐ 15940	Albert Yu	ContractYu	Custom	Reset Password	Permissions

Add User
Delete User(s)

Once a User is added, the system will automatically send them an email with an invitation to create a password, download the Incident Recording app, and access the system. Please note: The user will need to verify their Employee ID, and Date of Birth, as well as entering a valid password.

You may also, upon request, reset a User's password directly from this screen. Click the "Reset Password" button and the system will automatically email the User a Password Reset form.

You may also create User Credentials directly from the Person Master:

Update Person

Email:

Add User Credentials
Delete User Credentials

Person Type:
▼

Simply click the “Add user Credentials” next to the (required) email address field, and the email with the invitation will be sent automatically. You may also remove a User’s access credentials on this screen by clicking the “Delete User Credentials” button.

If you’d like to create many Users simultaneously (as opposed to one at a time), you may do so via the “People” data grid: From the Main Menu, navigate to “People”, then click the “Select” button. Choose (via checkmark) those Persons for whom you wish to generate credentials for, click “Actions”, and then “Create User Credentials”. Invitation emails will be created and sent automatically to all selected.

 **People**

Add New

0 rows selected

Show 10 entries

Select Actions Deselect All Rows

Search:

☐	ID	First Name	Status	SSN	Marital Status	Date of Birth	Date of Joining Organization	Position Title	Email	User Creds
☐	17989356	Lamont	Active		Single	Oct 2 1971	Mar 4 2004	Construction Specialist		Yes
☐	17989353	Jason	Active		Single	Feb 22 1985	Sep 1 2009	Construction Specialist		
☐	34577542	Bill	Active		Single			Lumberjack		
☐	17989349	Cheryl	Active	9876	Single	Apr 22 1964	Jan 10 2000	Construction Specialist		
☐	None	Jake	Active	None	Single			None		
☐	17989335	Cynthia	Active		Single	Jan 26 1990	Jan 6 2013	Construction Worker		Yes
☐	2789	Cynthia	Active	None	Single	Jan 26 1990		None		
☐	7989335	Sylvia	Active	022-34-5677	Single	Jan 27 1990	Jan 7 2013	Finishing and Shipping Specialist		
☐	5758	Marvin	Active		Single			Site Accountant		
☐	17989340	Alicia	Active	9876	Single	Feb 18 1982	Aug 8 2010	Equipment Specialist		

Showing 1 to 10 of 61 entries

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Next

Now, let's change the Permissions for Katherine Harless who is a Safety Manager:

User Permissions: Katherine Harless

Role Safety Manager Update

Note: This will update the current user's permissions to the selected role's permissions

Records

Clinic:

Read/Write

Company Profile:

Read

Employee:

Read/Write

Equipment:

Read/Write/Delete

Events:

Read/Write

Follow-Ups:

Read/Write

Hospital:

Read

Incident:

Read/Write

Location:

Read/Write

Notifications:

Read

User:

Read/Write

Zone:

Read/Write

Functions

Generate Forms:

Yes

Email Documents:

Yes

Upload Documents:

Yes

Download Documents:

Yes

Update

Initially, Katherine inherited the default privileges of a Safety Manager, as we defined above. However, in the example above, we changed Katherine's Privileges so that she can now "Read" Notifications. Making this change does not change the default privileges for Safety Managers. As you can see, Katherine's Role is now listed as "Custom".

	ID	Name	Username	Role	
☐	41	Cheryl Butner	CherylButner	Supervisor	Permissions
☐	44	Katherine Harless	KatherineHarless	Custom	Permissions
☐	43	Matthew Lowery	MatthewLowery	Supervisor	Permissions
☐	50	Robert Smith	BobSmith	HR Manager	Permissions

Add User Delete User(s)

Organization Profile

This information is required to complete your official reports, such as the First Report of Injury. It is essential that this is filled out completely otherwise critical information within these reports will be missing.

Most of these entries are self-explanatory. The last entry, “Generated File Prefix”, is the prefix that will be appended to the documents associated with any incident—for example the Required Documents such as Person Release Forms or the First Report of Injury. We suggest you use a two or three letter prefix.

Preferences

This is where you can find additional incident types such as “Utility Strike” and “Screening”. Additionally, if you wish to have outbound emails marked with your Organization’s Outbound Email Address, you may enter it here.

Form Templates

These are the templates for the “Required Documents” in the Compatica Incident Recorder. There are some example forms that you use, customize, or replace.

Follow Ups

These are the rules that you may want to preload into the system to ensure that any injured or ill Person is taken care of for the moment the incident occurs through until he or she returns to work.

Notifications

These are the rules that ensure that the people who need to be aware of an incident are informed immediately—whether by email, text message, or both. Note that you are not restricted to notifying Persons—you may choose to include your contact at your insurance broker or at a third-party administrator.

To Add a new Notification Contact, select “Add Contact”. Contacts may be notified by email, text, or both. Include the methods by which you would want them to be alerted.

Add Notification Contact

Name

Barney Rubble

Mobile Phone

336-669-9922

Email

barney@slaterock.com

Cancel

Create Contact

By default, the selected contact will be informed about all incidents, using the contact method or methods selected. However, if the contact need only be notified about incidents at specific locations, select the “Set Locations” and choose the locations that are relevant.

Select Work Locations to Be Notified About ×

☐ All ☒ Select Locations

Cancel

Confirm

Check All

Uncheck All

- ☐ Fire Station 1
- ☐ Fire Station 2
- ☐ Fire Station 3
- ☐ Fire Station 4
- ☐ Fire Station 5
- ☐ Safety Hill Town Hall
- ☐ Bailey Park
- ☐ Bishop Park
- ☐ Gower's Grove Park
- ☐ Mary Hatch Greenway
- ☐ Police Station 1
- ☐ Police Station 2
- ☐ Maintenance Shop
- ☐ Carpenter Village home
- ☐ Electric Power Substation

Cancel

Confirm

Similarly, if the contact need only be contacted about certain incident types, select “Set Types” and choose the relevant incident types:

Select Incident Types to Be Notified About ×

☐ All ☒ Select Types

Cancel

Confirm

Check All

Uncheck All

- ☐ For Record Only
- ☐ First Aid Only
- ☐ Beyond First Aid
- ☐ Near Miss
- ☐ Observation
- ☐ Vehicular
- ☐ Property Damage
- ☐ Third Party Liability
- ☐ Environmental
- ☐ Utility Strike
- ☐ Employee Screening

Cancel

Confirm

Forms and Form Library

Compatica provides a framework to create forms using a combination of data that has been collected from the incident, Organization data, and any additional data that needs to be added to complete the form.

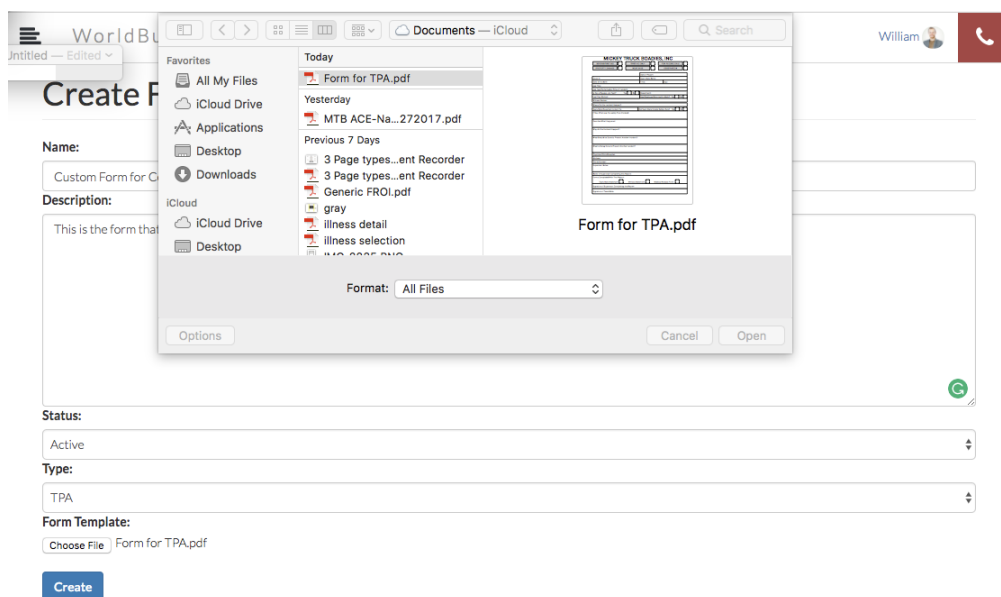
Forms may include, for example, the First Report of Injury for the relevant jurisdiction, internal Organization Reports, custom reports for your Third-Party Administrator--just about any kind of custom report that you want!

Forms are fillable PDFs.

To Add a new PDF, first you need to create the PDF--typically using Adobe Acrobat PRO. Forms can be scanned in or created within the Acrobat. Acrobat “senses” the fillable fields, but you may have to add the fields that Acrobat misses. Make sure that you label the fields with a name that makes it obvious what data is needed to be filled.

Compatica can automatically fill the data fields--such as Person name, employer address, insurance policy number, etc.; and select the appropriate button in a radio set or whether a checkbox requires a tick or not!

Once you have completed the form in Acrobat, save it and then, from within the “Forms” page, select “Add”.



Select the file and Compatica will import fillable PDF.

Basic Form Information

[Download Draft](#) [Cancel](#)

Name:	Standard FROI
Description:	Generic First Report of Injury or Illness
Incident types:	All
Author Organization:	-- Convert to Public Library Form --

Field Data Point Mapping

[Save](#) [Save & Exit](#) [Cancel](#)

EMPLOYER NAME ADDRESS INCL
ZIP (TextField)

Notes (optional, does not affect output)

Data Point

Organization - Name + Address (Newline Separated)

Capitalization

CARRIERADMINISTRATOR CLAIM
NUMBER (TextField)

Notes (optional, does not affect output)

Data Point

Capitalization

OSHA LOG NUMBER (TextField)

Notes (optional, does not affect output)

Data Point

Capitalization

Give the new Form a Name. By default, it will be “Active”. For convenience, describe the type (or purpose) of the form--whether it is an FROI, specific to your TPA, an internal document, etc.

Now, map the fields from the imported PDF to the data that is captured within Compatica.

Then “Save”

Please note, Compatica fills fields for data that it has collected--from both the incident report and the corporate data. In many cases, the form that you have imported will include data that Compatica does not collect. Typically, Compatica automatically fills the majority of the data. Then, since this is an editable PDF, you have full access to the form to complete the missing fields.

You now have a form that is ready to be added to the Incident Manager dashboard. From the Form Library you will see all available Forms-- FROIs for different jurisdictions, Internal Forms, and perhaps Custom Forms for your insurance broker or TPA. Select which of these you want to make available for the dashboard. Then “Save”.

Locations, Zones, Asset

Locations

Every business is different. Some businesses have large campuses, some have a head office in the owner’s house. Some have all their Persons working at permanent locations, others have work locations that are short term—job sites that exist for hours or days. Compatica works for all business models but for this example we are going to describe a business that has three offices—a main office and two regional offices.

Select “Locations” from menu on the left. Then “Add New”

Give the Office a Name: Say: “HQ”

And a Description: “Our Organization’s main headquarters in Lynchburg, VA”

A Location may contain Zones. In a manufacturing business, a zone may be a Loading Dock, a painting area, an assembly area, parking lot 3, kitchen, etc.—any convenient way of describing an area where a workplace incident may occur.

If this sounds like your business, add a few zones that would make sense.

Now add two more locations—maybe your regional office in Raleigh NC, and your office in Charlotte, NC.

Assets can range from large capital Assets to smaller Asset such as pneumatic drills.

For manufacturing businesses, much of the Asset that is identified is likely to be permanent to that location—for example the drills within the drill station, the conveyor belt running through the product line, or loading Asset in the Loading Bay. However, some Assets, such as a Forklift truck may move between zones.

We will work with you to pre-load the Asset that you already know you want to track. If an Incident Reporter is recording an incident that involves an Asset that is not yet in the database, or was associated with a different location or zone, he or she can quickly and easily add it or include it in the incident.

For construction companies, Assets are likely to be on site for short periods of time; indeed, the same Asset may be used in dozens of locations. Often the list of Assets is quite long!

When setting up Compatica, you pre-load Assets from your Asset database into Compatica. When there is an incident, the Incident Reporter will Search for and find that Asset when recording an incident. If the incident involves an Asset that is not yet in the database, the Reporter adds that Asset in real time as the incident is being recorded.

Clinics

The clinics to load are your preferred locations for Persons to be sent in the event of a workplace injury or illness. Compatica will automatically display the clinic that is closest to the location of the injury or illness. It is important that the current information about the clinic is maintained—such as the telephone number, operating hours, and current address.

Hospitals

Compatica maintains a list of ER facilities. This is useful if, when using the Incident Recorder, the Reporter elects to take the Person to ER. Similarly, if this is an emergency and a first responder takes the Person to an ER facility, we can normally simply select that facility from the list.

Person Location Assignment

In the section above, we had a first look on Persons. We ensured that Persons had been imported correctly.

However, in some Organizations you may prefer that, rather than displaying every Person in the Organization, the Incident Recorder displays only those Persons that are relevant to that supervisor or recorder.

Supervisor and Person Location

Compatica includes the ability to assign Persons to specific locations, and to assign specific location responsibilities to a supervisor or recorder.

For example, perhaps your Organization has 400 Persons, 8 supervisors and 4 locations each with 100 Persons. If “Supervisor 1” has responsibility for Persons at both (but only) “Location 1” and “Location 2”, she will only see Persons at Locations 1 and 2. If Supervisor 2 has responsibility for only Location 3, he will only see Persons that are based out of Location 3. And so on.

This model also works if your business is regionalized—for example, Supervisor 1 is responsible for all Persons working out of North Carolina and South Carolina, Supervisor 2 is responsible for Persons working out of Florida, Supervisor 3 is only responsible for Persons working out of the Organization’s manufacturing plant in Tennessee.

Supervised Locations only available if Type is set to Location Supervisor

Until you specify that Persons should be supervised by Location Supervisors, Compatica assumes that all Persons may be viewed by all supervisors on all Incident Recorders. This is the default set up. As such, when you first see a Person record you will see that the Supervised locations option is not available.

Type:	Employee
Phone:	9193320717
Status:	Active
Assigned locations:	
Supervised locations:	Supervised Locations only available if Type is set to Location Supervisor

The Person can be assigned specific locations, “Assigned locations”, but they will still be visible to all Incident Recorders.

To ensure that the Incident Recorder only displays the Persons that are the responsibility of a Location Supervisor, you will need to make the Supervisor a “Location Supervisor”.

Location Supervisor

Note, this feature is only available to you if you have already created multiple locations. If you have, you are ready to organize Persons and supervisors within those locations.

Supervised Locations

Go to “Supervised locations” and select the drop down. You will see a list of all of the locations that you have currently identified. Select all the locations that the Supervisor is responsible for, all the locations where they may be recording incidents. This means that when the Supervisor is recording an incident, they will only see Persons that have been assigned to the location (we will look at Assigned locations, below), and the list of locations she will see will be (her) list of Supervised locations.

Type:	Location Supervisor
Phone:	9192334554
Status:	Active
Assigned locations:	BUILDING 1: Warehousing, BUILDING 3: Finishing, Packaging & Shipping
Supervised locations:	BUILDING 1: Warehousing, BUILDING 3: Finishing, Packaging & Shipping
Address:	201 N Main St

Assigned Locations

Persons may be working out of Assigned Locations. Persons working out of an Assigned Location will appear (by default) on the Incident Recorder of the Supervisor with responsibility for that location. If a Person works out of more than one location, you should select each of the locations that the Person may work out of.

For example, the Person shown below has been assigned to both Building 1 and Building 2. He will appear on Silvia’s list of Persons as she is supervising Building 1, and he will also appear as Person on the Incident Recorder for Brian Jones who is supervising Persons at Building 2.

Type:	Employee
Phone:	9193320717
Status:	Active
Assigned locations:	BUILDING 1: Warehousing, BUILDING 2 : Generator Assembly

Bulk Management of Persons

Compatica includes the option to make bulk changes to the Persons' status—whether “Active” or “Inactive”, or to the Locations to which the Persons are assigned. This occurs, for example:

- Where Persons are seasonal and may shift from being “Active” during the working seasons, to being “Inactive” in the non-working seasons. Note, in this case the work location may continue to “Active” throughout the year but with a smaller headcount in the “quiet” season
- Where Persons have been hired to meet specific geographic and skills needs that are required for as long as the job (work location) is “Active”.
- Where a new job starts (or picks up) and some Persons are now re-“Assigned” to the new work location. In some situations the Person will be “Unassigned” from the previous work location, in others the Person the new location will be in addition to his or her currently assigned location(s)—until such time as the currently assigned locations are fully complete.

 **People** Add New

0 rows selected

Show: 10 entries Select Actions Deselect All Rows Search:

☐	ID	First Name	Status	SSN	Marital Status	Date of Birth	Date of Joining Organization	Position Title	Email	User Creds
☐	17989356	Lamont	Active		Single	Oct 2 1971	Mar 4 2004	Construction Specialist		Yes
☐	17989353	Jason	Active		Single	Feb 22 1985	Sep 1 2009	Construction Specialist		
☐	34577542	Bill	Active		Single			Lumberjack		
☐	17989349	Cheryl	Active	9876	Single	Apr 22 1964	Jan 10 2000	Construction Specialist		
☐	None	Jake	Active	None	Single			None		
☐	17989335	Cynthia	Active		Single	Jan 26 1990	Jan 6 2013	Construction Worker		Yes
☐	2789	Cynthia	Active	None	Single	Jan 26 1990		None		
☐	7989335	Sylvia	Active	022-34-5677	Single	Jan 27 1990	Jan 7 2013	Finishing and Shipping Specialist		
☐	5758	Marvin	Active		Single			Site Accountant		
☐	17989340	Alicia	Active	9876	Single	Feb 18 1982	Aug 8 2010	Equipment Specialist		

Showing 1 to 10 of 61 entries

Previous 1 2 3 4 5 6 7 Next

Open the “Persons” page and then “Select”. You can now choose:

- Any Persons that are currently “Active” that are no longer employed by the Organization, and are now “Inactive”
- Any Persons that are currently “Inactive” that have been re-employed by the Organization, and are now “Active”
- Any Persons that are no longer working at a location in which they are currently assigned (“Unassign from Locations”)—most obviously when the job is complete are the requirement for that Person’s special skills are no longer required
- Any Persons that is being adding to a work location (“Assign to Location”)—most obviously when a new job is being started or for an existing job when that Person’s skills are now required.

Cancel Assign Selected Employees to these Locations

Note that all Persons that you have selected will be assigned to all of the locations that you have selected.

MANAGING AN INCIDENT

Compatica manages many kinds of incidents. These incidents include:

- Injury:
 - First-Aid Only
 - Beyond-First Aid
 - For Record Only (FRO)
- Damage:
 - Vehicular
 - Third-Party Liability
 - Property Damage
 - Environmental Damage
 - Utility Strike
- Safety:
 - Observations
 - Near-Miss

 Incidents Add New

Show 10 entries Select

Search:



ID	Company	Type	Date	Work Location	Employee	Equipment	Reporter	Status
750	WorldContract		Apr 18 2021	NC23-Wegman's Cary-Morrisville Site	n/a	Excavator 210G	Conrad Smith	Active
749	WorldContract		Apr 18 2021	NC23-Wegman's Cary-Morrisville Site	n/a	Grader	Conrad Smith	Active
748	WorldContract		Apr 18 2021	NC23-Wegman's Cary-Morrisville Site	Lamont Ballard	Commercial Pick Up Truck	Conrad Smith	Active
747	WorldContract		Apr 18 2021	NC23-Wegman's Cary-Morrisville Site	n/a	n/a	Conrad Smith	Active
746	WorldContract		Apr 18 2021	NC23-Wegman's Cary-Morrisville Site	n/a	n/a	Conrad Smith	Active
745	WorldContract		Apr 16 2021	NC23-Wegman's Cary-Morrisville Site	Juan Gonzalez	Compactor	Conrad Smith	Active
744	WorldContract		Apr 16 2021	NC23-Wegman's Cary-Morrisville Site	Juan Gonzalez	Compactor	Conrad Smith	Active
743	WorldContract		Apr 16 2021	NC23-Wegman's Cary-Morrisville Site	Juan Gonzalez	Compactor	Conrad Smith	Active
742	WorldContract		Apr 16 2021	I40 Extension	William Elkins	Commercial Pick Up Truck	Conrad Smith	Active
741	WorldContract		Apr 16 2021	NC23-Wegman's Cary-Morrisville Site	William Elkins	Compactor	Conrad Smith	Active

Showing 1 to 10 of 215 entries (filtered from 651 total entries)

Previous

1

2

3

4

5

...

22

Next

By selecting the “Incidents” option in the menu, you will see all incidents in Compatica. By default, Compatica displays the “Active” incidents--meaning those incidents that are not yet complete or closed. Click on the arrow pointing at the incident record to reveal more details about the incident.

The third column shows each incident with its “Incident Type”. If you need help understanding the meaning of icon, move your cursor over the icon and it will display the incident type.

If you want to see the completed incidents, click on the menu selection at the bottom of the “Status” column--currently displaying “Active”, and select “Completed”. To see both “Active” and Completed” select the blank option. Experiment and you will see that each of the columns behaves in a similar way.

The example below shows a sorted list of “Completed” incidents.

Incidents

Add New

Show 10 entries Select

Search:

ID	Company	Type	Date	Work Location	Employee	Equipment	Reporter	Status
737	WorldContract		Apr 13 2021	NC23-Wegman's Cary-Morrisville Site	n/a	Excavator 210G	Conrad Smith	Completed
731	WorldContract		Apr 6 2021	NC23-Wegman's Cary-Morrisville Site	n/a	Excavator 210G	Conrad Smith	Completed
702	WorldContract		Feb 26 2021	NC23-Wegman's Cary-Morrisville Site	n/a	Excavator 210G	Conrad Smith	Completed
522	WorldContract		Jun 29 2020	A1-Headquarters, Cary	n/a	n/a	Conrad Smith	Completed
510	WorldContract		Jun 5 2020	A1-Headquarters, Cary	Lamont Ballard	n/a	Conrad Smith	Completed
509	WorldContract		Jun 4 2020	PD34-Pipe Laying I-77	Jason Banks	n/a	Conrad Smith	Completed
508	WorldContract		May 28 2020	NC23-Wegman's Cary-Morrisville Site	Lamont Ballard	n/a	Conrad Smith	Completed
507	WorldContract		Jun 5 2020	NC23-Wegman's Cary-Morrisville Site	Lamont Ballard	n/a	Conrad Smith	Completed
505	WorldContract		Jun 5 2020	NC23-Wegman's Cary-Morrisville Site	n/a	Excavator 210G	Conrad Smith	Completed
504	WorldContract		Jun 5 2020	I40 Extension	n/a	Excavator 50G	Conrad Smith	Completed

Showing 1 to 10 of 436 entries (filtered from 651 total entries)

Previous 1 2 3 4 5 ... 44 Next

Incident Header

Beyond First Aid: Gonzalez, Juan (17989355)

Incident ID: 745

Time Occurred: April 16, 2021, 12:04 p.m. (US/Eastern)

Record Created: April 16, 2021, 12:23 p.m. (US/Eastern)

[Close](#)
[Delete](#)
[Email](#)
[Report](#)
[Edit](#)

INJURY/ILLNESS DETAILS

Left Leg - Left Ankle (Bruise)

Employee injured left ankle using compactor.

LOCATION

Worksite Location NC23-Wegman's Cary-Morrisville Site

Zone Wegman's Foundation

Equipment Compactor

Incident Location 35.7971, -78.8541

Map
 Satellite

Map data ©2021 Terms of Use Report a map error

RESPONSE

First Aid Given:

Description: Ice and bandage

Given By: Matt Lowery

Sent to Clinic

Clinic: Duke Primary Care Time: Apr 16, 2021, 12:13 p.m. (US/Eastern) Escort: Lowery, Matthew (17989351)

The header of incident describes the essential information about the incident—who, what, where, when, and response. The example above is “Beyond First Aid: William Smith” incident--meaning that the William required medical attention.

To the right, to see more details about the injury/illness, location, and response, simply click on the associated icon. The section expands (as shown in the example above). If you to find out more about, say, the Location, or how many Persons that the Organization has sent to a specific clinic select that link and you will go straight to the relevant page.

To the left you will see the Incident Number, the injured or ill Person, and the timestamp details.

Close: This is where you can “Close” an incident. An incident is closed when it is complete and is no longer being managed within Compatica. Although closed, the incident record is still accessible (as described above). Incidents may be reopened as needed.

Delete: All incidents are considered “Active” until they are “Closed” or, in the rare circumstances, “Deleted”. Very few users will have the option, or even see the “Delete” option. This is one of the permissions set up in “Role Permissions” above. However, please note that even “Deleted” incidents are not removed entirely and may be retrieved, upon request.

Email: The “Email” option provides the ability to email some or all of the documents associated with the incident—including some or all of the Required Documents; the First Report of Injury; or Text, Photo, or Audio statements.

 Email Incident Documents ✕

Recipients

nigel@compatica.com

Subject

Documents from Cheryl's incident

Message

Here's the set! 

Select Statements

Statement Type	Created By	Role	Submitted On
☒ Acknowledgement of Injuries and Illness		William Smith	10/28/2017
☒ Acceptance of Physician Panel		William Smith	10/28/2017
☒ Authorization for Release of Medical Information		William Smith	10/28/2017
☒  Image	Cheryl Butner	Employee	10/28/2017
☒  Image	Cheryl Butner	Employee	10/28/2017

Send

Compatica maintains a log of all emails that have been sent, so that you ensure that each of the targeted recipients has all the relevant documents.

Edit: For some incidents, details that were provided by the Incident Recorder may need correction--perhaps the incident was recorded as a “First Aid Only” but the Person then needed medical attention, there was an unrecorded injury, or the recorder selected the wrong zone. Errors, omissions, or changes to the incident can be made through the “Edit” option

Edit Incident
×

Type

Beyond First Aid

Incident Time

04/03/2019 07:26 pm

Location

SITE 1: I-40/421

Zone

ZONE 2: Overpass

Equipment

Rough Terrain Crane

Injuries

Left Leg

Upper Left Leg

Burn (Heat)

Add

Illnesses

Add

Clinic

Novant Health Urgent Care

Hospital

Select Hospital

Save

For other incidents, the information that is required includes information that could not have been collected in the Incident Recorder and some of that information is required for incident forms and reports.

For Utility Strikes, Compatica has included the ability to capture additional information about the incident within the Incident Manager. The data collected, when aggregated with the data collected from the Incident Recorder and other saved information (including Organization Profile information) may be used for a wide variety of forms—including industry-specific “Damage Information Reporting Tool” or “DIRT”.

Edit Incident
✕

Type	Utility Strike	
Incident Time	08:24 am	
Location	NC23-Wegman's Cary-Morrisville Site	
Zone	Wegman's Foundation	
Equipment	Pick Axe Small	
Event Type	Damage	
Utility Struck	Natural Gas	
Utility Marked Correctly?	Yes	
Utility Within Tolerance Zone?	Yes	
Non-DIRT Incident		
Horizontal Distance from Mark	24	in
Depth of Strike	66	in
Work Area Whitelined?	Yes	
811 Locate Ticket #	AR226912	
811 Locate Ticket Date Issued	09/18/2019	
811 Locate Ticket Current?	Yes	
811 Notified of Damage?	Yes	
Time and Date 811 Notified	09/25/2019 10:30 am	
811 Damage Ticket #	DMG226256	
Utility Notified of Damage?	Yes	
Utility Name	Dominion Gas	
Time and Date Utility Notified	09/25/2019 10:20 am	
Utility Damage Ticket #		
Called 911?	Yes	
Equipment Used	Hand Tool	
Excavator Downtime?	Yes	
Downtime Hours?	1.5 hours	0 minutes
Whose Right of Way?	Private Land Owner	
Crew Size Affected by Workstop	4	
Costs incurred by excavator downtime	\$25001 to \$50000	
Party submitting information	Excavator	
Type of facility		
Is facility part of joint trench	No	
Does incident involve a cross bore	No	
Is facility owner a One Call member	Yes	
Is facility owner One Call exempt	No	
What work was being carried out	Road Work	
Third Party Locator Name	USPIC	
Who is the locator	Contract Locator	
Time Work Resumed		
Did the damage cause an interruption in service	Yes	
Duration of interruption	6 - 12 hours	
How many customers affected	Unknown	
Cost of damage, repair, restoration	Unknown	
What caused utility strike	Facility marked inaccurately - Locator error	

Cancel
Save

Beneath the Incident Summary, you will see the tabbed area with the Incident Details.

Events
Documents
Triage

ListCalendar

Documents Timeline

Name	Due Date	Completion Date	Alerts
 First Report of Injury: Generic	May 12, 2016, 12:19 p.m.	Jun 26, 2016, 6:38 p.m.	Completed
 Acknowledgement of Injuries and Illness (No Signature)	—	May 12, 2016, 12:22 p.m.	Completed

Appointments

Type	Date	Location	Description	Alerts
Hospital Appointment	May 12, 2016, 12:19 p.m.			Missed

Communications

Type	Date	Title	Description	Alerts
Scheduled Call	May 12, 2016, 12:19 p.m.	Phone Call Follow-Up		Missed

“Events” map out the incident timeline, starting with the dates of the initial documents, appointments that have been made, and the communications schedule.

The default view is the “List” view.

To look at the incident calendar, or to add new events within the calendar, simply select the “List” view to the “Calendar” view. Entries in the calendar are either generated automatically (based on your Organization’s rules for incident management), or manually.

To review an existing entry, simply click on the event in the calendar—where you can review the required action and ensure that it is completed on the targeted date.

To add a new appointment, simply click on the date and describe the nature of the appointment. All appointments related to the incident are tracked. You can see the schedule of appointments—they are all either pending, completed, or missed—clearly a missed appointment might suggest that there is an issue! An appointment is marked as “missed” if the file has not been updated. To update the appointment, simply click on the event and complete the form.

Documents

Documents are organized as “Required Documents”, such as the First Report of Injury (FROI), Statements, and Additional Documents (such as medical reports, or any other documents that the Incident Manager may consider relevant).

Required Documents

The first set of documents that are accessible from with Required Documents are:

- Acknowledgement of Injuries and Illness
- Acceptance of Physician Panel
- Authorization for Release of Medical Information

In incidents that involve an injury or illness, and when the circumstances allowed it, the recorder will have gotten these forms signed:

WorldBuild
2017 Old US Highway 70 Clayton, NC, 27520
919-550-5000

Acknowledgement of Injuries and Illness

To Whom it May Concern

Patient: Cheryl Butner
Incident Date: 10/28/2017
Address:

Injuries: Right Arm - Lower Right Arm, Laceration

I, Cheryl Butner, agree that the injuries and illness identified in this report are the only injuries or illnesses that I am aware of that resulted from today's incident.

Signature:



Date: 10/28/2017 7:53 PM

Signature attested to by: William Smith

If it was not practical to have had these forms signed at the time of the incident, they can be added now.

The other forms that can be added include the forms that have been added to the Forms Library (discussed above). This is likely to include:

- First Report of Injury (FROI) for the relevant municipality/state
- Custom forms that may be requested by your TPA or insurance broker/carrier
- Internal incident/safety reports

Each of the forms that you have included in the Form Library and have made "Active" will be available for selection. By selecting that Form, Compatica will automatically generate and populate the form complete with the Organization and incident information. Since these are fillable PDFs, this is an opportunity to add any information that was not included.

Statements

The statements captured by the Reporter in the Compatica Incident Recorder are already in the Statements folder. To add a new statement, click: "Add".

Click "Download" to create a Zip file of the Statements and click "Email" to mail these documents.

Additional Documents

You can add new documents, such as the results from the Drug and Alcohol tests, bills received, and any other correspondence by clicking “Add” and dropping the files into the Document Uploader. These documents are now available to anyone with access privileges to the Incident Manager.

Incident Team

The screenshot shows two panels. The 'Contacts (2)' panel on the left lists two contacts: Ashley Alexander (Injured Employee) and Bonnie Yancey (Submitting Employee). Each contact has a red 'X' icon for removal. The 'Comments' panel on the right has a text input field and an 'Add' button.

To add to the incident team, click: “Add”. This will add access to the Incident Record to the named personnel—perhaps at your insurance broker or Third Party Administrator, or the additional personnel in your Organization. To remove a person, simply click “X” in the Contact panel.

The “Comments” panel enables any of the participants in the Compatica Incident Manager to collaborate on the incident.

Bulk Completion

Click “Select” in the Incident grid. Each Incident row will display a checkbox which may be selected. Once all selections have been made click “Action”, followed by either “Mark Active” or “Mark Completed”, as per your intent. The desired action will be performed and the screen shall revert to the original Incident Grid.

0 rows selected									
Show	10	entries	Select	Actions	Deselect All Rows	Search:			
	ID	Type	Date	Work Location	Employee	Equipment	Reporter	Status	
☐	259		Jun 11 2020	Clayton Highschool	Jason Banks	Excavator	Peter Smith	Active	
☐	237		Jun 9 2020	Offsite	n/a	None	Peter Smith	Active	
☐	221		Jun 8 2020	Offsite	Richard Harrell	None	Peter Smith	Active	

SCREENINGS

Screenings

Add New

Showing 1 to 10 of 39 entries

Show	10	entries	Select	Search:				
ID	Date	Work Location	Employee	Reporter	Fit for Work	Status		
260	Jun 11 2020	Clayton Lanes Bowling	Jason Banks	Peter Smith	Yes	Active		
258	Jun 11 2020	Clayton Highschool	Jason Banks	Peter Smith	No	Active		
257	Jun 7 2020	Headquarters	Gloria Sanchez	William Elkins	Yes	Active		
256	Jun 7 2020	Headquarters	Gloria Sanchez	William Elkins	Yes	Active		
255	Jun 7 2020	Headquarters	Gloria Sanchez	William Elkins	Yes	Active		
254	Jun 11 2020	Clayton Lanes Bowling	Gloria Sanchez	William Elkins	n/a	Active		
253	Jun 11 2020	Clayton Highschool	Richard Harrell	Peter Smith	No	Active		
252	Jun 11 2020	Clayton Highschool	William Elkins	Peter Smith	No	Active		
251	Jun 11 2020	Clayton Lanes Bowling	Katherine Harless	Peter Smith	n/a	Active		
249	Jun 11 2020	Clayton Lanes Bowling	Cheryl Butner	Peter Smith	n/a	Active		

Previous1234Next

Person “Fit-for-Work” Screenings which were added via the app are displayed here. Click the left green arrow to expand the Screening row and display additional screening data,

260

Jun 11 2020

Clayton Lanes Bowling

Description:

Incident Location: 35.7943567 / -78.8483725

Temperature: 200.0 °F

Impaired: Yes

Provider Advice: Do Not Work

Symptoms: Allergies

Protective Gear: Yes

or click the Screening row in the grid to open the Screening Detail View:

Employee Screening: Banks, Jason (1976) : Clayton Highschool

Screening ID: 258

Fit for Work: No

Time Occurred: June 11, 2020, 8:18 a.m. (US/Eastern)

Record Created: June 11, 2020, 8:27 a.m. (US/Eastern)

Close

Delete

Email

Report

Edit

DESCRIPTION

Screening: Thursday AM

LOCATION

Worksite Location Clayton Highschool

Incident Location 35.7966961 / -78.8540343

SCREENING

Fit For Work: No

Temperature: 101.0 F

Impaired: No

Medical Advice: Do Not Work

Symptoms: Tiredness

Physical Issues:

Protective Gear: Yes

Click the “Edit” button to display the Screening Editing view, where you may update or modify information collected in the Screening:

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Screening Time	06/11/2020 08:18 am	US/Eastern
Location	Clayton Highschool	
Fit for work	No	
Temperature	101	Fahrenheit
Impaired	No	
Provider Advice	Do Not Work	
Protective Apparel and Gear	Yes	
COVID-19 Exposure?	No	
Symptoms Present	Tiredness	
Physical Issues	-----	

Cancel

Save

When done editing click “Save”.

REPORTS

Incidents

Add New

Show 10 entries

Search:

ID	Type	Date	Work Location	Employee	Equipment	Reporter	Status
107		Sep 4 2019	Wegman's Cary-Morrisville Site	Laura Mendez	Pick Axe Small	Conrad Smith	Active
101		Sep 3 2019	Headquarters	Alicia Davis	None	Conrad Smith	Active
98		Sep 2 2019	Wegman's Cary-Morrisville Site	Lamont Ballard	None	Conrad Smith	Active
97		Sep 2 2019	Wegman's Cary-Morrisville Site	n/a	Excavator 50G	Conrad Smith	Active

As discussed above, the Incident Dashboard provides a list of all incidents (both Active and Complete) as well as being a quick and effective tool to view and report on incidents--by any of a wide variety of criteria. Incidents can be arranged using the right-hand icon and sorted (using the arrows on the headers) by Incident Type, Person, the Injury or Illness, where the incident occurred, Date, and Days Away from Work.

Summary reports can be copied (to be pasted into custom reports), saved as CSV files, Excel files, or PDFs. For example, if you want a report of all Beyond First Aid injuries in Site 2: Fayetteville Job, this can be accomplished with just a couple of clicks:

Incident Report

[Add New](#)

Status

- ☒ Active
☐ Completed
 Active

Incident Type

- ☒ Beyond First Aid
☐ First Aid Only
☐ For Record Only
☐ Near-Miss
☐ Observation
☒ Utility Strike
 Utility Strike, Beyond First Aid

Date Range

From:
 To:

Employee
 Injury Type Sub Body Part
 Specific Injury
 Location Equipment
 Specific Location
 First Aid

Advanced Search ^

ID	Severity	Employee	Reporter	Injury/Illness	First Aid	Specific Location	Hospital/Clinic	Date	Status
2531	Beyond First Aid	Thompson, Christopher	Smith, Conrad	Laceration - Left Leg - Left Ankle	No	NC23-Wegman's Cary-Morrisville Site - Wegman's Foundation	C. Preston Medical Associates	09/09/2019	Active
2530	Utility Strike	Roberts, Jeannette	Smith, Conrad	None	No	NC 567 Wegman's Cary Site	None	09/08/2019	Active

Column Visibility

Downloading an Incident Report

To the right of the search field, you will see several icons. These provide you with the ability to select which fields you want to see in the Incident Manager display (the right side icon), as well as the ability to download this key Incident Report to your PC—as a CSV, Excel, or PDF.

Select the relevant icon and the report will automatically download to your device.

EPISODES

On occasion we find that multiple Incidents originated from the same event. For example: a vehicular collision which may have an Injury, Property Damage, and Vehicle Damage, all at the same time. We refer to such multi-incident events as “Episodes”, and we track them by creating a unique Episode and selecting into it the related incidents:

Episode 8

Created: Aug 17, 2021, 6:46 p.m.
 Last Updated: Aug 17, 2021, 6:46 p.m.
 Created by: Smith, Conrad (17989358)
 Location(s): NC23-Wegman's Cary-Morrisville Site, I40 Extension,
 Zone(s): Wegman's Foundation, I-40 Extension, Steam, I-40 Extension,
 Asset: Compactor, Bucket Truck, Steamshovel, Bucket Truck, Excavator 210G
 Description: Crash
 Status: Active

[Update](#)
[Delete](#)

Incidents

Show 10 entries

ID	Type	Date	Work Location	Person	Asset	Reporter	Status
783	Excavator	Aug 3 2021	I40 Extension	Lamont Ballard	Excavator 210G	Amenadav Feinstein	Active
779	Bucket truck	Jul 19 2021	I40 Extension	Conrad Smith	Bucket truck	Conrad Smith	Active
778	Steamshovel	Jul 15 2021	I40 Extension	Conrad Smith	Steamshovel	Conrad Smith	Active
775	Bucket truck	Jul 9 2021	I40 Extension	Cynthia Chin	Bucket truck	Conrad Smith	Active
774	Compactor	Jun 30 2021	NC23-Wegman's Cary-Morrisville Site	Jason Banks	Compactor	Conrad Smith	Active

Showing 1 to 5 of 5 entries

[Previous](#)
[Next](#)

Personnel (4)

Banks, Jason (17989353)
 Role: Construction Specialist
 Title: Construction Specialist

Chin, Cynthia (17989335)
 Role: Construction Worker
 Title: Construction Worker

None
 Role: Title

Ballard, Lamont (17989356)
 Role: Construction Specialist
 Title: Construction Specialist

The system will agglomerate all involved personnel and included assets.

Questions

If you have any questions, please call [888-802-4084](tel:888-802-4084)

Or Submit a Helpdesk request at:

<https://compatica.zendesk.com/hc/en-us/requests/new>