



Finance and Corporate Resources
Occupational Health and Safety Management System

Online Safety Event Reporting Tool (OSERT)

User's guide

Version 1.0 – March 2025

Online Safety Event Reporting Tool (OSERT)

OSERT is the Council's system for reporting a range of adverse safety events including accidents, near miss events and violence. This guide will help you to report any adverse safety event.

The quickest way to report an adverse event makes use of your employee number and the email address you have registered for use within FUSION. If you have not yet registered an email address for use with FUSION contact the relevant personnel team for help registering one.

If you do not have an operational email address within FUSION It is still possible to make a report using the "I am submitting a record on behalf of someone else" option.

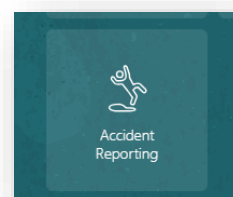
This guide offers guidance on the following:

1. [Getting access.](#)
2. [Setting a report path.](#)
3. [Form completion.](#)
4. [What happens next.](#)
5. [Manager investigation.](#)

Information and assistance on using the system will always be available from your Service Health and Safety Officer.

1) Getting access

Access to the system can be obtained via the "Me" tab on FUSION. If you do not have access to FUSION then contact HRHelpdesk@southlanarkshire.gov.uk to arrange access. Alternatively, someone else from your Service or your line manager can complete a record on your behalf



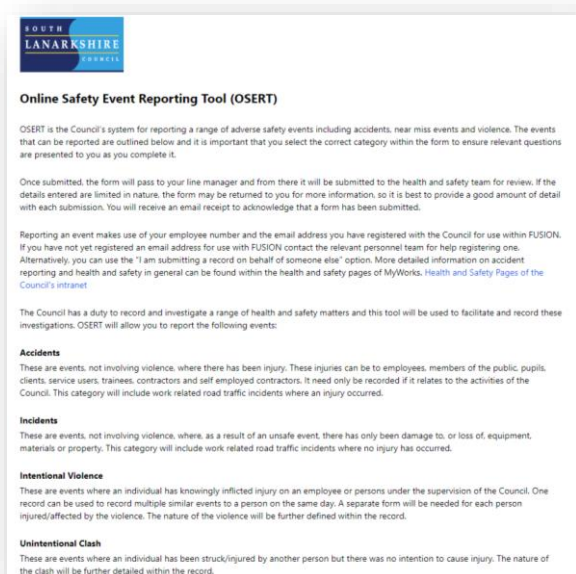
Alternatively access to the reporting system can be obtained from within the health and safety pages of MyWorks.

From the main MyWorks home page choose health and safety from the list of links on the right hand side of the page.

Clicking there will take you to the main health and safety page from which there are a few routes to the accident reporting page. The most direct route is clicking the "Incident Reporting and Audits/Inspections" link on the right hand side.



Landing page



Access to the reporting system is via the applications landing page. This page offers a short guide to the system and the categories of incident that can be reported via the system.

Over time these definitions may well change, or others may be added. It is important that the page is reviewed on each occasion you access it.

After reviewing the details click on the “report a safety event” button to start the reporting process.

Report a Safety Event

2) Setting a report path

As the system aims to help you report a range of event types, the early choices made on the form will influence the questions asked later in the form, and the options contained in a number of the drop down lists that will be presented to you. Care should be taken to select the correct category.

When reporting an event involving themselves, employees that have access to an email account that has been registered within FUSION will need to complete fewer fields than others using the system.

So, with that in mind, it is important to establish who is making the report. The system allows for the following people to report an event.

- Reporting on behalf of someone else (this can be anyone within the same Service as the affected/involved employee).
- The person affected by, or witnessing, the event.
- The manager of the affected/involved employee.

Use the drop down list to allow the system to present you with the necessary identification details page.

The screenshot shows the 'About You' step (Step 1 of 7) of the reporting process. It features a progress bar at the top right showing 14% completion. The main question is 'Who is Entering the Details on this form?'. Below this is a dropdown menu with the text 'Select who is entering the details'. Three options are visible in the dropdown: 'I am submitting the record on behalf of someone else' (highlighted in light green), 'I am the employee affected by/witnessing the event', and 'I am the manager submitting a record on behalf of a team member'. A blue 'Next' button is located at the bottom right.

Verification

If you are an employee reporting an event involving yourself then you will be asked to enter your employee number (pressing send once entered), the system will then send an email message with a verification code to your registered email address. Once that code is entered on screen you will be presented with a reduced number of identification pages. If you have more than one role with the council you will be asked to select from a drop down list the particular post to which the record relates.

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STEP 1 OF 7

About You 14%

Who is Entering the Details on this form?

I am the employee affected by/witnessing the event

Employee Number

12345678

Send Code

Next

Some fields are compulsory, and you will not be able to move past the page until appropriate data has been entered, these will flag up with red text.

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STEP 1 OF 7

About You 14%

Who is Entering the Details on this form?

I am the employee affected by/witnessing the event

Employee Number

12345678

Send Code

Verification Code

Enter code sent via email

Verify Code

Next

Note

It is important to note that the many of the pages will be presented in a slightly different format to the ones shown within this document. There are many combinations of pages and layouts linked to choices made for certain key fields, however the principal processes are the same on all pages presented.

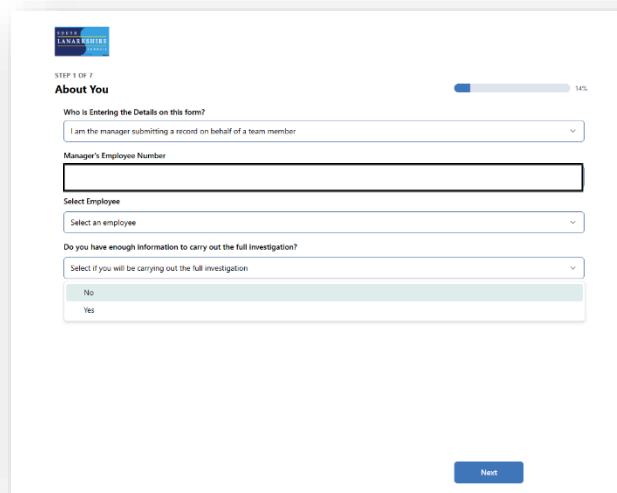
Employee reporting on behalf of the affected/involved person

If you are not the employee affected/involved, or their manager, then the verification step will be skipped and you will progress to the next page where you will be asked to complete a number of fields that will help gather the information needed to collate, review and investigate the circumstances of an event.

Manager reporting on behalf of the affected/involved person

The system will allow you to take the notification forward in one of two ways. If you are in possession of all the information needed to offer a summary of your investigation, then you can complete the whole form.

Select “no” if you are simply creating a notification and are not yet ready to complete the part 2 investigation pages. Select “yes” if you are in a position to complete the whole investigation.

The screenshot shows a web form titled 'About You' with a progress bar at the top right indicating '14%'. The form is divided into sections: 'Who is Entering the Details on this form?' with a dropdown menu showing 'I am the manager submitting a record on behalf of a team member'; 'Manager's Employee Number' with a text input field; 'Select Employee' with a dropdown menu showing 'Select an employee'; and 'Do you have enough information to carry out the full investigation?' with a dropdown menu showing 'Select if you will be carrying out the full investigation'. Below this dropdown are two radio button options: 'No' and 'Yes'. A 'Next' button is located at the bottom right of the form.

3) Completing the form

Having selected the most appropriate user option, and completed the verification processes needed for that option, you can now complete the form.

Resource/Workbase information

Once you have pressed the next button the system will look to gather information related to the workplace of the affected/involved employee. This will start with the collation of:

- **Resource**
Use the drop down menu to tell us which Resource/Organisation you work for.
- **Service**
Please tell us which Service area you work for.
- **Associated section**
Using the drop down please tell us which section the injured/involved person works for.
- **Workbase**
Please tell us the workbase from which the injured/involved person works. This may well be an administrative centre where their line manager works. This field has an auto-search function, typing in “3rd” will bring up all workbases that have “3rd” in their description and a workbase can be selected from that short list. If your workbase is not there, it may have another name e.g. “High Patrick Street” is also known as “Regent House”. If a search for alternative names does not identify your workbase then you should pause your reporting and contact your Service Health and Safety Officer for further advice.

- **Exact location**

This is an important element that helps identify trends within a building, or other geographical areas. It should contain enough detail to allow someone to easily find the place again.

- **Map Location**

If the location is outside and away from an easily identified location/property then use the map function to locate the place the event took place (this is useful for mobile work locations, school trips or visits to other authority locations). Once found on the map, click on the location and the exact location will be noted.

The image shows two overlapping screenshots of a web form titled 'Resource Information' from South Lanarkshire Council. The form is at 'STEP 2 OF 7' and has a progress bar at 28%. The top screenshot shows the 'Exact Location' field with a text input. The bottom screenshot shows the 'Map Location' field with a text input and a 'Select on Map' button. The form also includes fields for 'Resource', 'Service', and 'Workbase'.

Resource Information

The information you provide on this form will be processed by South Lanarkshire Council

Resource

Select a resource

Service

Select a service

Workbase

Select a workbase

Exact Location

In your own words, please enter your exact lo

Previous

Exact Location

In your own words, please enter your exact location. Be as precise as possible.

Map Location

Enter map location

Select on Map Clear Location

Previous Next

The final part of this page is looking for the name of the person making the report together with a contact telephone number. Those that used the verification process at the start should see their details in the form already.

The image shows a screenshot of the 'Resource Information' form from South Lanarkshire Council. The form is at 'STEP 2 OF 7' and has a progress bar at 28%. It includes fields for 'Name', 'Designation', and 'Phone Number'. There are also 'Select on Map' and 'Clear Location' buttons. The form has 'Previous' and 'Next' navigation buttons at the bottom.

Resource Information

Name

Enter name

Designation

Enter designation

Phone Number

Enter phone number

Select on Map Clear Location

Previous Next

Name of affected person

Depending on the inputter method chosen there will be a need to confirm who the affected person is. This is the person that has been injured, was involved in the incident, or witnessed the near miss.

Selecting the type of person affected will determine the page that is then presented. Some information may well be “auto-filled” whilst other fields will require to be completed manually. A manager will be able to pick the name off a hierarchy list.

STEP 4 OF 7
Section 2 - Person Affected
Category: Incident
Employee Number: 4000115
57%

Please select if the person affected is an employee or non-employee.
Employee

Employee Number
[Text Input Field]

Occupation/Job Title
608404 Health and Safety Advisor

Status of Person Involved
Status of Person Involved

Previous Next

Where an employee has more than one role, a drop down list will be used to ensure the correct job title is being allocated to the event.

When selecting a non-employee a few additional fields presented. For non-employees under the age of 18 an approximate age is needed to help define an appropriate data retention period for each record.

Event details

The next step in the process looks to gather information about the event that has led to the need to report it. The following is needed for each report being made:

- **Date of the event**
This date reflects the date on which the event started/took place.
- **Time of the event**
This reflects the time that the circumstances started or were first observed.
- **Date reported**
That will be the day the circumstances were made known to a line manager, not necessarily the same as the date the form is being filled in.
- **Category**
The selection of the correct category is key to being able to report an event quickly and efficiently. The table below helps with the selection process and is reflective of the details already provided on the landing page and the health and safety pages of MyWorks. Appendix 1 offers more detail.

Was there an injury? (Select one of the following)	Did the event result in no injury? (Select one of the following)
Accident	Incident
Intentional Violence	Safety Concern, no injury
Unintentional Clash	Verbal Abuse/Harassment

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STEP 3 OF 7

Section 1 - Event Details 42%

Pick a date

Time of Incident

Date Reported

Category

Select a category

Previous Next

Selecting incident, safety concern no injury or verbal abuse/harassment will bypass a few fields such as injury details or first aid.

If you are reporting the event on behalf of someone else, you will be asked to provide details of who they are over the next couple of pages

Description of the event

The event type must now be selected using the drop down list provided. If a relevant event type is not on the list consider if you have chosen the correct category on an earlier page, you can return to previous pages using the “previous” button at the bottom of each page.

If an appropriate event type is still not present, then you can seek advice from your Service Health and Safety Officer.

A description of the event should be given. If there is not enough detail given a request form will be sent to you for additional information. Please avoid using names in the description, instead use initials of any relevant persons.

If you have any drawings or photographs relating to the event then these can be attached at this point in time.

Please note that the description cannot be amended by anyone other than the original writer.

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STEP 5 OF 13

Section 3 - Description of Event 38%

Event Type
Select event type

Incident Description
Provide a detailed description of the incident/disease and any medical treatment provided.

Attachment 1 No file selected Select

Attachment 2 No file selected Select

Attachment 3 No file selected Select

Attachment 4 No file selected Select

Attach Files or Photos using the Select button

Previous Next

Witnesses

The system allows for the recording of 2 witnesses. Clicking the yes box will bring up a page that can be used to record the witness's name(s) and a place to attach any statements that might be available at that time. Managers will be able to attach further statements as their investigation proceeds.

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STEP 6 OF 13

Section 4 - Witnesses 40%

☐ Witness Present - Yes

☒ Witness Present - No

Previous Next

Job Done!

That concludes the initial report form, although if you selected the “manager completing the full form” option at the start then the system will take you forward on to the manager investigation sections (see the next part of the guidance document for information on that).

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STEP 7 OF 7

Confirmation 100%

Accident Reported

Thank you for reporting your Accident form to South Lanarkshire Council. You will receive a confirmation email shortly that will detail the next steps regarding your claim. If you have any questions, please email hsaccident_reporting@southlanarkshire.gov.uk

Submit another form

4) What happens next?

Once the form has been submitted OSERT will do a number of things, summarised as follows:

- It will send you a “receipt” email to let you know that your submission has been successfully made. If you are using a personal email address as part of the employee contact details, you may need to check your junk folder for this.
- It will send a copy of your form to the health and safety officer and the health and safety accident email inbox.
- It will send an email to the relevant line manager to advise them that they have an event record to review/investigate.
- Some anonymised details from the form will be sent the trade unions (this allows the council to comply with the statutory requirement to give them early knowledge of accidents).
- On a regular basis some basic details will be added to a table of submissions that will be shared with relevant managers to ensure the record is being properly and timeously investigated/processed.

Note on recording of violence

When a record is being made for violence in a school environment there will be a need to record the school year to which the instigator belongs. That will be chosen from the drop down list that will be available on that particular page.

5) Manager investigation

Managers can arrive at this section in a number of ways.

Continue from input

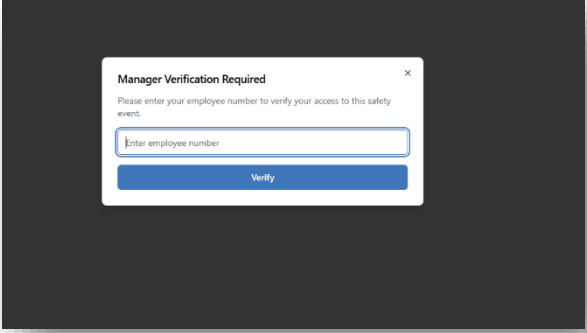
If the manager has chosen to complete the full form then they are able to continue on and complete the rest of the form (explained earlier).

Using a token

In circumstances where a full form cannot yet be completed then the manager will receive an email “token”. This link will take the manager to start of the form and gives them a chance to review the form before adding in their comments/ evidence. The token is valid for 5 days. If the token expires then you will need to contact your Service Health and Safety Officer for a new token to be issued.

Part 2

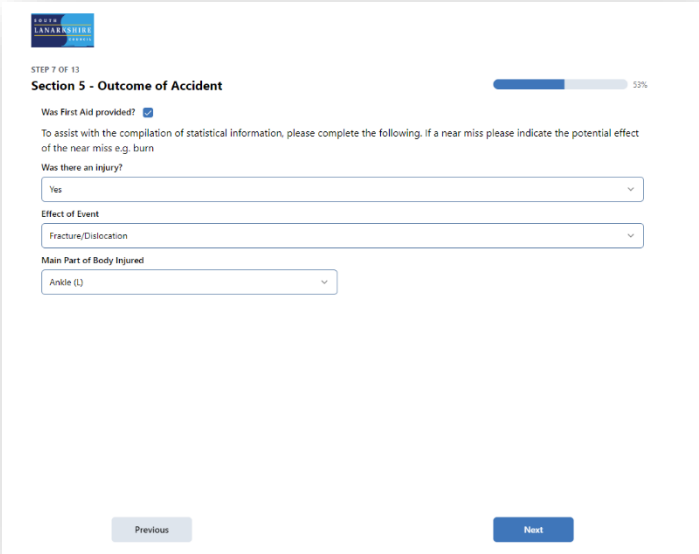
If the manager had opted to undertake the investigation later then an email will have been sent to them giving them a link to update the form at a later date. This link will only allow the manager to access the record if they verify their employee number. This process is intended to ensure that should the incorrect manager email be entered at any stage that those receiving the email in error cannot access the record.

A dark grey dialog box with a white title bar that says "Manager Verification Required" and a close button (X). The text inside says "Please enter your employee number to verify your access to this safety event." Below this is a text input field with the placeholder "Enter employee number" and a blue "Verify" button.

If you enter the employee number incorrectly, then re-use the link provided in the email to try again.

Outcome of event

The outcome (or potential outcome(s)) also needs to be recorded. Where an injury related category has been selected then information will be sought around that. If a no injury category has been selected there may be some questions around what might have happened.

A screenshot of a web form titled "Section 5 - Outcome of Accident" with a progress bar showing 53% completion. The form includes the following fields: "Was First Aid provided?" with a checked checkbox; "To assist with the compilation of statistical information, please complete the following, if a near miss please indicate the potential effect of the near miss e.g. burn"; "Was there an injury?" with a dropdown menu showing "Yes"; "Effect of Event" with a dropdown menu showing "Fracture/Dislocation"; and "Main Part of Body Injured" with a dropdown menu showing "Ankle (L)". At the bottom are "Previous" and "Next" buttons.

Reporting to the Health and Safety Executive (HSE)

Certain workplace accidents or events may be reportable to the Health and Safety Executive. This process can take place in one of two ways.

1. If the event has been a fatality, then telephone notification is required.
2. If the event is a defined dangerous occurrence or a specified type of injury, then an online notification will be sufficient.

Reporting to the HSE must only take place if a Health and Safety Officer has agreed that it needs to be reported. The criteria for reporting can sometimes be complicated and so a discussion must be had prior to a report being made.

In order to understand, and record, why the circumstances of a submission have led to a report being made (or not being made) to the HSE, this section will gather that information. If it has been agreed that it is reportable to the HSE then tick the box, select the reason from the drop down list and indicate how contact was made. Record the date they were contacted and the HSE reference number provided by the HSE call handler or the email received from them for any online reporting made.

The image displays two overlapping screenshots of a web form titled "Section 6 - Incident Reported to HSE".

Top Screenshot:

- Header: "STEP 8 OF 13" and "Section 6 - Incident Reported to HSE" with a progress bar at 61%.
- Instruction: "The decision to report an incident to the Health and Safety Executive can only be made after discussion with the Health and Safety team."
- Form Field: "Reportable to HSE?" with an unticked checkbox.
- Text: "Please enter the reason why the event was not reportable".
- Dropdown: "Select reason" with a downward arrow.
- Footnote: "Please note no events should be reported to the HSE without first discussing the circumstances with the Health and Safety team. The incident should also be notified to the Council Risk Management Section on 01698 455847".
- Button: "Previous".

Bottom Screenshot:

- Header: "STEP 8 OF 13" and "Section 6 - Incident Reported to HSE" with a progress bar at 61%.
- Instruction: "The decision to report an incident to the Health and Safety Executive can only be made after discussion with the Health and Safety team."
- Form Field: "Reportable to HSE?" with a ticked checkbox.
- Text: "Please enter the reason why the event was reportable".
- Dropdown: "Select reason" with a downward arrow.
- Form Fields: "Was HSE contacted by phone (fatalities) 0845 300 9923?" and "Was HSE contacted via www.hse.gov.uk (over 7-day absence, specified injuries, dangerous occurrences and occupational diseases)".
- Form Fields: "Date HSE Contacted" with a calendar icon and "HSE Incident Number" with a text input field.
- Text: "Please note no events should be reported to the HSE without first discussing the circumstances with the Health and Safety team. The incident should also be notified to the Council Risk Management Section on 01698 455847".
- Buttons: "Previous" and "Next".

If it is evident that the circumstances do not reach the threshold of reporting to the HSE then leaving the “reportable to HSE” box unticked will present a drop down list of reasons for it not being reportable. Managers do not need to consult a Health and Safety Officer to make these decisions and if there is dubiety around the need to report and event then the Service Health and Safety Officer will flag this up.

Absence

The Reporting of Injuries, Diseases and Dangerous Occurrences Regulations (RIDDOR) require the council to be able to record the number of accidents that caused absences of over 3 days, and report to them any accident that involves an employee being unable to undertake their normal duties for more than 7 days. It is also helpful to be able to determine the average amount of time off being experienced as a result of accidents in the workplace.

For these reasons this page of the system looks for an indication of the number of days someone is absent from the workplace as a result of an injury sustained at work. The drop down list should be used to record a relevant number of days (this may well be zero).

The screenshot shows a web form titled 'Section 7 - Absence' at 'STEP 9 OF 13'. A progress bar indicates 60% completion. The instruction reads: 'Please indicate the number of days an employee was off work (not including the date of the accident). If the answer is zero, select 0'. Below this is a dropdown menu labeled 'Select days absent'. At the bottom are 'Previous' and 'Next' buttons.

Manager comments

This section offers the manager an opportunity to offer their own thoughts. The investigation summary is collected in the next text box, however this box can be used to record contradictory opinions or values of damaged property etc. Documents relating to the manager's investigation work can be attached here too e.g. a more detailed report, technical reports, further medical information, photographs witness statements etc.

The screenshot shows a web form titled 'Section 8 - Manager Comments/Additional Information' at 'STEP 10 OF 13'. A progress bar indicates 70% completion. The instruction reads: 'Please indicate any additional damage, e.g. to equipment, associated with incident or any First Aid given.' Below this is a large text area. Further down are four attachment slots, each with a 'Select' button. The slots are labeled 'Attachment 1', 'Attachment 2', 'Attachment 3', and 'Attachment 4'. At the bottom are 'Previous' and 'Next' buttons. A small note at the bottom right says 'Attach Files or Photos using the Select button'.

Submitting manager

There may be occasions where the manager completing this form is different to the manager/supervisor that undertook the investigation work. The next couple of sections look to gather that information.

Some elements may be completed already and the manager need only fill in the gaps.

The screenshot shows a web form titled "Section 9 - Submitting Manager" which is "STEP 11 OF 13". A progress bar at the top right indicates 64% completion. The form contains four input fields arranged in a 2x2 grid:

- Manager Name:** A text input field with the placeholder "Enter manager name".
- Designation:** A text input field with the placeholder "Enter designation".
- Email:** A text input field with the placeholder "Enter email address".
- Completion Date:** A date picker field with the placeholder "Pick a date" and a calendar icon.

At the bottom of the form, there are two buttons: "Previous" on the left and "Next" on the right.

Investigation and corrective action details

Here the summary of the investigation is recorded along with the corrective actions taken/recommended. The text box and drop down lists should be used to reflect the manager's views and recommendations.

The corrective action(s) recommended will be transferred to the council's corrective action management system and completion monitored.

STEP 11 OF 12

Section 10 - Investigation Summary and Corrective Actions

Form Reference: OS/0461
 Category: Accident
 Employee Number: 8718924
 Employee Name: Hamilton Stuart
 Job Title: 604256:Health and Safety Manager

91%

Person responsible for taking corrective action forward

☐ Tick if you carried out the investigation

Carried Out By: Designation:

Contact Phone No: Date of Investigation:

Root Cause:

Investigation Summary:

Corrective Action:

[Previous](#) [Submit](#)

Escalation

Reporting and investigation are key to meeting statutory obligations placed on the council. Where defined timescales are not being met, details of the relevant records, will be included in an escalation process.

Anything that is reported to a manager must be uploaded and investigated within 10 days. Regular reports will be made to Resource Health and Safety Co-ordinators and where extended non-compliance is noted Heads of Service.

Quarterly reports are made to the CMT and all RMTs about the event records that are not being progressed in a timeous manner.

Help/support

The system has been built to be as intuitive as possible. It is also recognised that as a new system it will need to develop and mature to meet the needs of each Resource and Service area. Feedback is key to the system's long term success and comments and suggestions are welcome as these will help in its development.

The Health and Safety team have the capacity to adjust some of the drop down lists, whilst other suggestions/adjustments may need to be collated and passed to the software provider for consideration at the next appropriate time.

More detailed information on accident reporting and health and safety in general can be found within the health and safety pages of MyWorks. [Health and Safety Pages of the Council's intranet](#)

Appendix 1

The Council has a duty to record and investigate a range of health and safety matters and this tool will be used to facilitate and record these investigations. OSERT will allow you to report the following events:

Accidents

This category is used when there has been an injury. It is used to record work related accidents (including road traffic accidents) involving employees, the public, clients or contractors. It is not used to record events involving violence of any sort.

Incidents

This category is used when there has been no injury. It is used to record damage or loss of equipment, materials or property due to a work related unsafe event (including non-injury road traffic incidents). It is not used to record events involving violence of any sort.

Intentional violence

This category is used when there has been an injury. It is used when a council employee, or someone under council supervision, is injured as a result of a deliberate act of physical violence. If a person suffers multiple similar events in one day, all events can be reported together in a single report. However, separate reports are required for each affected person.

Unintentional clash

This category is used when there has been an injury. It is used to record events where a council employee, or someone under council supervision, has been injured by another, but there has been no intent to cause harm.

Verbal abuse/harassment

This category is used when there has been no injury. It is used to record events where a council employee, or someone under council supervision, has been subject to threatening, intimidating or aggressive behaviour by another. If a person suffers multiple similar events in one day, all events can be reported together in a single report. However, separate reports are required for each affected person.

Safety concerns (no injury)

This category is used when there has been no injury. It is used to record any situation with the potential to cause harm or loss, also known as a “near miss”.