

User Guidance

Guidance to support the reporting of incidents onto the *myHS* portal.

Supplied by



Introduction

This guidance provides managers and employees with information on how to report accidents and incidents on the Health and Safety Management Information System (*myHS* portal).

The guidance is split into the following sections:

Part 1: Step by Step Guide to Incident Reporting using an incident form: This section guides the user through selecting, completing and submitting a relevant incident report from the *myHS* portal .

Part 2: Useful Links): This section contains links to relevant guidance.

Reporting of Incidents

All incidents should be reported by employees as soon as is reasonably practicable to their line manager. Duty holders and line managers must ensure that the incident is then recorded on the *myHS* portal within **two working days** of the incident.

Part 1: Guidance to Incident Reporting Forms

Accessing the myHS Portal reporting forms

1. There are three ways to access the myHS portal and the incident reporting forms:

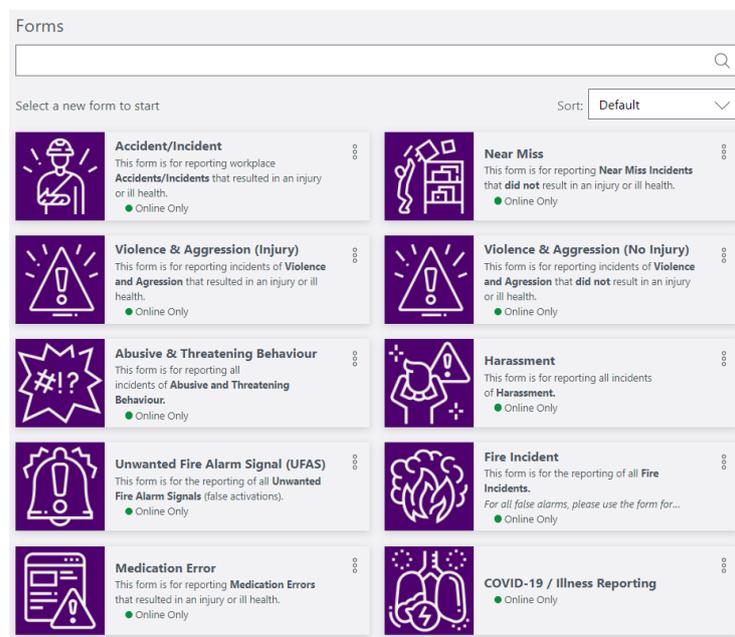
- From the myHS link on the Health and Safety Incident page on the [Orb](#).
- By scanning the QR code here, on the Orb or as displayed in the workplace.
- myHS license holders can access the incident forms from their myHS dashboard.



2. From the Orb, navigate to > **Health and Safety** > **Reporting an incident**. Click on the myHS link to access the main portal page.

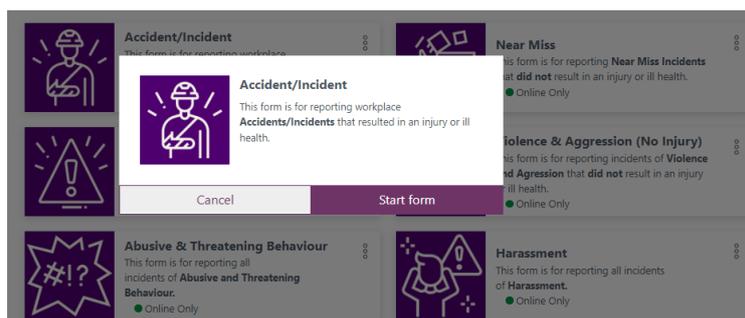
Form Selection

3. From the main portal page, you are able to report Health and Safety workplace incidents, as well as Fire Safety incidents.



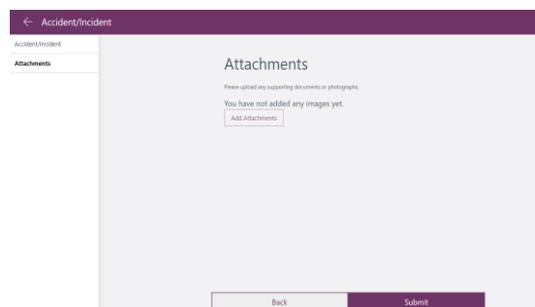
4. Click on the incident reporting form that is relevant to the incident you are reporting.

5. When the selected form launches, a pop-up message will appear with a short description of the form you have selected. If this is the correct form, select **'Start Form'**. If it is not the correct form, select **'Cancel'** to return to the form selection page. It is important to select the correct form as you are not able to change this once you have begun entering details.

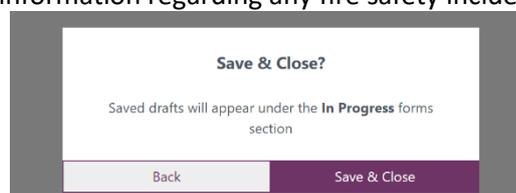


Quick Guide to Completing the Form

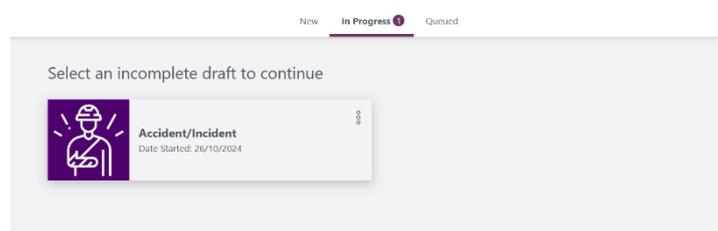
- The form is self-explanatory and should be straight-forward to complete. You should take your time reading the question and then complete the relevant field with the information requested. Highlighted below is some additional information on key areas to help you complete the form.
- It is important that you take your time completing the form as you must ensure dates, times and any other information is accurate. You can save in progress forms at any time (see point 14)
- Where a field in the form is marked with a red asterisk (*), then this question needs to be answered, otherwise you will not be able to submit the form once completed.
- To assist with accurate completion of the form, some questions have fixed information dialogue boxes above them, marked with 🏠 ⚠️. These questions have additional guidance which can be viewed by clicking on the [View Guidance](#) link and reading the pop-up dialogue box.
- Once you have completed the questions, select [NEXT](#) – this will take you to the **attachments and submission page**. Here you can attach relevant; photos, video clips and documents e.g. risk assessments, written statements, hand drawn diagrams or any other relevant files



- If you wish, you can select [BACK](#) to edit any part of the form. Once you are satisfied that the form is complete, you can select [SUBMIT](#).
- A copy of the report will also be sent to the relevant manager where you have input their email address for notification.
- Once you have submitted the form, it will be reviewed by the Council's Corporate Health and Safety team. A Health and Safety Adviser may contact you if further information about the incident is required. The Fire Safety team will contact you if they require further information regarding any fire safety incident report



- At any time while completing the form, you may save the current form, by clicking [CLOSE](#) – the form will then give you the option to save it.
- To re-open and complete any saved forms, simply go to the top of the forms page and select [IN PROGRESS](#), then select the form you wish to complete. The report will not be submitted until you have pressed submit.



Key Questions

Org Unit (start of the form)

16. To ensure accurate reporting, it is important you select the correct Organisational Unit (**Org Unit**) for the person affected/injured by the incident.
17. In this section of the form, it is important that the service area which the injured/affected employee works in is selected. **DO NOT SELECT** City of Edinburgh Council. For instance, if a janitor in a school has been involved in an incident you select the service they work for, rather than the school Org Unit.
18. For non-employees (service users, pupils etc.) it is the relevant care home, school etc that they are at.

Org Unit

Org Unit *
Organisational Unit Selection

⚠ For accurate reporting, please DO NOT select/use The City of Edinburgh Council

It is important that the relevant Organisational Unit is selected:

- For employees – This is the Organisational Unit they work for
- For non-employees (service users, pupils etc.) it is the relevant care home, school etc that they are at.

Step 1. Click on the search box
Step 2. In the pop-up search box, start typing the location e.g. City for City Art Centre
Step 3. From the list select the appropriate location
Step 4. Click OK

19. The quickest and simplest way to find an Org Unit is to search for it using its name in the search box. Click anywhere in the search box field, a pop-up window will appear, from here you can search for the required Org Unit by typing in to the search bar.
20. The example below shows how this would look if searching for “**Dalry Primary School**”.

Select Org Unit

Search Results

- The City of Edinburgh Council (DO NOT SELECT) > Children, Education and Justice Services > Education > Nurseries in Primary Schools > Dalry Nursery Class
Go
- The City of Edinburgh Council (DO NOT SELECT) > Children, Education and Justice Services > Education > Primary schools > Dalry Primary School
Go

Cancel OK

21. In the above example, 'Dalry' was typed, and the directory list automatically loaded the search result options. Dalry Primary School appeared in the directory list. Once you have selected the correct Org Unit click [OK](#).
22. You can also navigate through the organisational structure by clicking and opening the relevant organisational chain until you locate the applicable Org Unit.
23. This is the same process, for whatever *myHS* form you select to complete.

Was the incident work related?

24. You should only select **YES** if the incident arose out of or in connection with a 'work activity', this includes acts of non-consensual violence and aggression.

Was the incident work related *

 For example: in relation to a work activity, condition of the premises the way activity was carried out; equipment failure, etc...

Yes No

Guidance: The following points will assist in completing the 'work-related' section of the form:

- a) The fact that there is an incident at work premises does not necessarily mean that the incident is work-related – the work activity itself must contribute to the incident. An incident can be considered 'work-related' if any of the following play a significant role:
 - the way the work was carried out;
 - any machinery, plant, substances or equipment used for the work; or
 - the condition of the site or premises where the accident happened.
- b) If a pupil or service user was injured or involved in an incident where, for example, a lack of supervision, a defect with the premises, or a failure of work equipment is deemed to have contributed to the causation of the incident, then this would be classed as work-related incident.
- c) If you are travelling to an appointment, leaving work, or left the office to go to lunch and you have an accident, this is not classed as work-related incident, as you are NOT carrying out a working task.

Did the incident result in staff absence from work?

25. This only applies to employees or agency staff if they become absent from work as a result of the incident.
26. Staff are absent if they **leave their place of work** and **do not return** to complete their shift. Taking time out from their duties and then returning **on the same day** and completing their shift should **not be** recorded as an absence.

Did the Incident result in a staff absence from work? *

[View Guidance](#)

Yes No

Start of staff absence date

27. If a member of staff is absent, use this field to indicate the date their absence began.



The screenshot shows a form section titled "Did the Incident result in a staff absence from work? *". Below the title is a "View Guidance" link. There are two radio buttons: "Yes" (unselected) and "No" (selected). Below this is another section titled "Start of staff absence date" with a "View Guidance" link. It contains three input fields for "Day" (DD), "Month" (MM), and "Year" (YYYY), followed by a "Today" button.

28. This field is important as if a member of staff is absent from work for more than 7 days, excluding the day of the incident, due to a work-related incident then this may require a RIDDOR report to be sent to the HSE (these are only reported by the Corporate Health and Safety team).

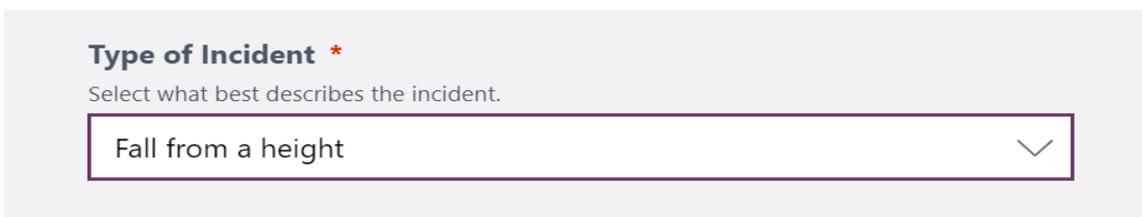
29. If a member of staff subsequently goes absent from work due to an incident after the incident form has been submitted. please notify healthandsafety@edinburgh.gov.uk so that the record can be updated.

Type of Incident

30. The main incident type is predetermined by the type of form you have selected to complete e.g. Accident/Incident, Near Miss, Harassment, Medication Error etc.

31. To select the type of incident you are reporting, open the drop-down picklist by pressing anywhere on the **'type of incident'** search box. Processed to scroll down the picklist selecting the 'incident type' that best matches the incident you are reporting – once selected it will appear in the field.

Note: The form is for recording accidents and incidents. There may be other local arrangements for recording certain incident types, such as SEEMiS for recording pupil to pupil behavioral incidents.



The screenshot shows a dropdown menu titled "Type of Incident *". Below the title is the instruction "Select what best describes the incident." The dropdown box contains the text "Fall from a height" and a downward-pointing chevron icon.

Details of the incident

32. Please ensure the information recorded is as descriptive as possible. It is important that there is a clear description of how the incident occurred and how injury (if applicable) was caused.

Details of the incident *

 Provide a clear description of how the incident occurred and the injury, with as much detail as possible.

 Use initials when describing service users or pupils

Text Length: between 0 and 100000 characters

Guidance: When completing this section, consider whether the person reviewing the form and reading the description will be able to have a clear understanding of the incident. Also consider including the following information if relevant:

- What was the work activity being undertaken at the time of the incident?
- What happened in the lead up to the incident?
- What were the environmental conditions at the time of the incident (weather temperature, lighting, floor/ground condition etc.)?
- What was the name and type of machinery/equipment/substances involved in the incident?
- Any other relevant information that describes in full what happened.

Guidance: It is good practice **NOT** to use full names in the details of incident section. Standard procedure is to use **IP** to describe the **injured person** and the initials of anyone else involved.

Guidance: Use the attachment section of the form to include photographs, risk assessments, witness statements, inspections or other relevant information you think would support the incident investigation. You can then refer to these documents in your description.

Incident reported by

33. Enter **the full name** of the person who initially reported the incident to line management. This could be different to the person injured/affected.

34. A common mistake with the form is to record the individuals' job title, rather than their name.

Incident reported by *

 Enter the name of the person who initially reported the incident.

Text Length: between 0 and 60 characters

Incident Portal Form Completed by

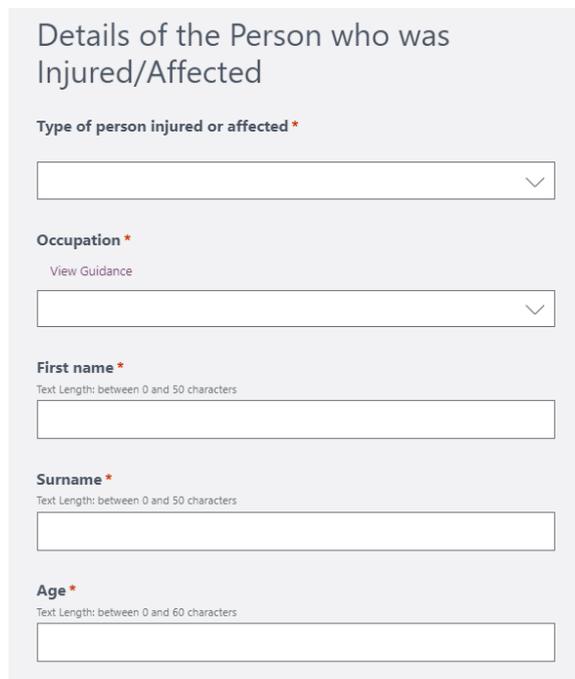
35. The person recording the incident on *myHS* needs to complete this section with their full name. This is important as it provides an initial contact point should any follow-up be required by the Corporate Health and Safety Team or Fire Safety Team.
36. A common mistake with the form is to record the individuals' job title, rather than their name.



The screenshot shows a form field titled "Incident Portal Form Completed by (full name) *". Below the title is a link for "View Guidance". Underneath, it specifies "Text Length: between 0 and 30 characters" and features a single-line text input box.

Details of the Person who was Injured/Affected

37. This section is all about the **injured/affected person** and their details.



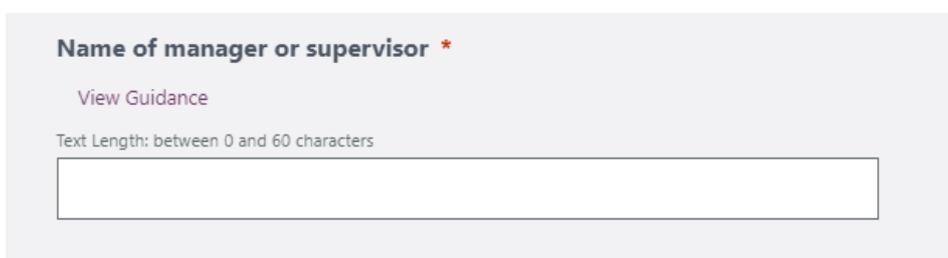
The screenshot displays the "Details of the Person who was Injured/Affected" section. It includes several fields: "Type of person injured or affected *" (a dropdown menu), "Occupation *" (a dropdown menu with a "View Guidance" link above it), "First name *" (a text input box with "Text Length: between 0 and 50 characters" above it), "Surname *" (a text input box with "Text Length: between 0 and 50 characters" above it), and "Age *" (a text input box with "Text Length: between 0 and 60 characters" above it).

Guidance: Where there has been a violent incident to a member of staff, it is important you **do not put the assailant's details into this section**, as this is requested later within the form where assailant and witness details are requested.

Name of manager or supervisor

38. This part of the form requires the name of the injured/affected persons manager or supervisor to be added.

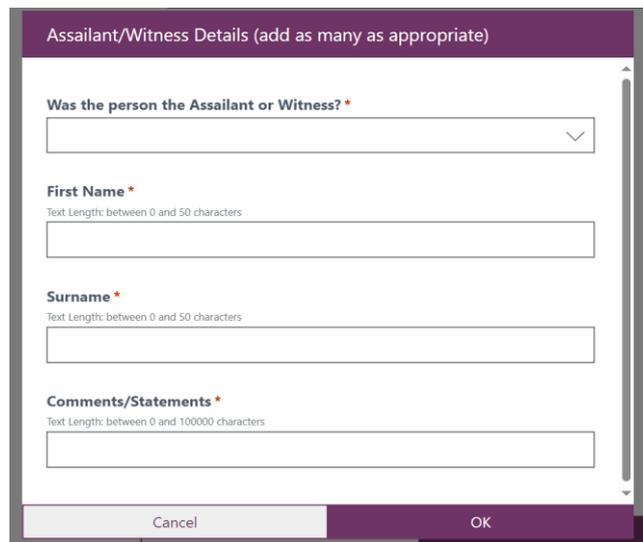
Guidance: If the affected person is a pupil, service user or contractor, then the details of the relevant manager for the service should be recorded.



The screenshot shows a form field titled "Name of manager or supervisor *". Below the title is a link for "View Guidance". Underneath, it specifies "Text Length: between 0 and 60 characters" and features a single-line text input box.

Assailant/Witness Details

39. Where details of any assailant/witness are to be included, click on the link [Add Assailant/Witness Details](#) and then complete the pop-up form (you can add as many as required)
40. Include the full name of any Assailant/Witness in this section, rather than initials.
41. Witness statements can either be typed into the comment/statement field or uploaded as an attachment. If you choose to upload, please still record the details of the witnesses in this section.



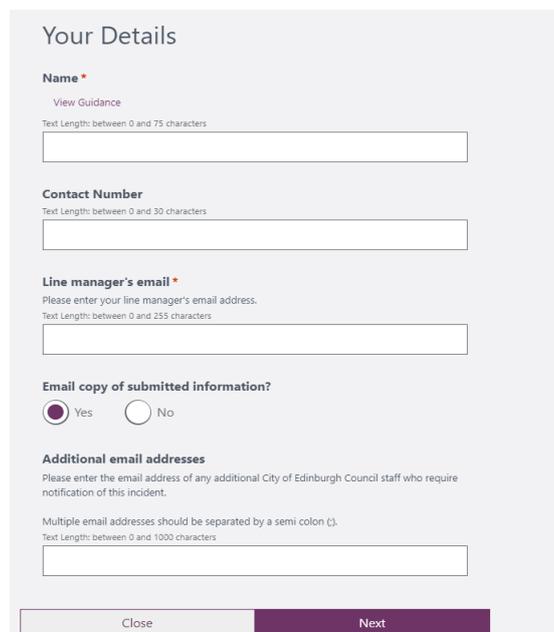
The screenshot shows a purple-themed pop-up form titled "Assailant/Witness Details (add as many as appropriate)". It contains the following fields:

- A dropdown menu labeled "Was the person the Assailant or Witness? *".
- A text input field labeled "First Name *" with a sub-label "Text Length: between 0 and 50 characters".
- A text input field labeled "Surname *" with a sub-label "Text Length: between 0 and 50 characters".
- A text input field labeled "Comments/Statements *" with a sub-label "Text Length: between 0 and 100000 characters".

At the bottom of the form are two buttons: "Cancel" and "OK".

Your Details

42. At the end of the form, it will ask for details about the person recording and submitting the *myHS* report form.



The screenshot shows a light grey form titled "Your Details". It contains the following fields and options:

- A text input field labeled "Name *" with a sub-label "View Guidance" and "Text Length: between 0 and 75 characters".
- A text input field labeled "Contact Number" with a sub-label "Text Length: between 0 and 30 characters".
- A text input field labeled "Line manager's email *" with a sub-label "Please enter your line manager's email address." and "Text Length: between 0 and 255 characters".
- Radio buttons for "Email copy of submitted information?" with "Yes" selected and "No" unselected.
- A text input field labeled "Additional email addresses" with a sub-label "Please enter the email address of any additional City of Edinburgh Council staff who require notification of this incident." and "Multiple email addresses should be separated by a semi colon (;). Text Length: between 0 and 1000 characters".

At the bottom of the form are two buttons: "Close" and "Next".

43. You must also include the email addresses of managers that require a copy of the report. Where numerous managers/supervisors email addresses are added then these should be separated by a semi-colon (;). Ensure that the email address is entered accurately for the relevant line manager. This will create an auto-notification to the line manager that a report has been submitted.

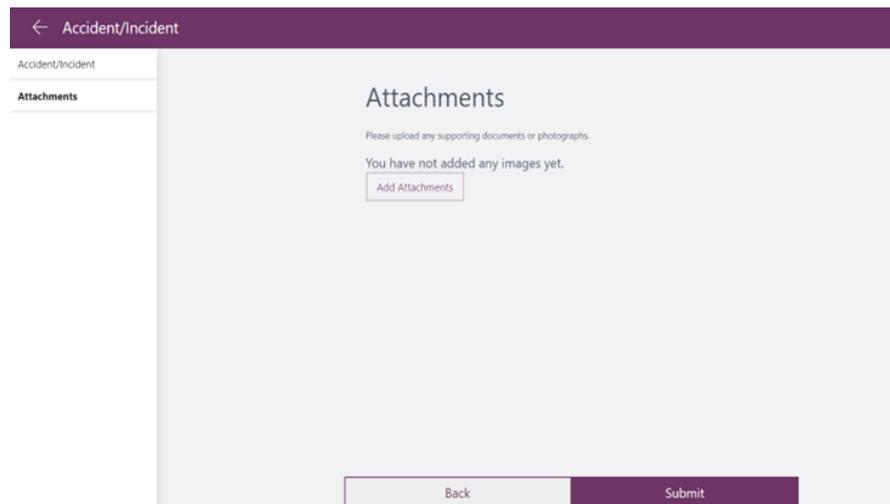
44. Under the heading “email copy of submitted information”, select **YES** to ensure copies are sent to the email addresses entered into the form.

Guidance: This is an important section of the form as the notifications will support the relevant manager or supervisor in carrying out an investigation. If there is anyone else who should see this report, then add their email in the ‘Additional Email Addresses’ box. Please note only Council work emails should be recorded and not personal email accounts.

45. It is recommended that you read over the form and make any changes, before clicking **NEXT**

Attachments

46. In this final section of the form, it will prompt you to attach any documents or evidence. These can be Jpeg photographs, short MP4 video clips, word or PDF Documents e.g. risk assessments, witness statements etc.



Submitting the Form

47. At this stage, you can press **BACK** and either review the completed form to check all the information is accurate, or make changes to any information within the form.

48. Once you are satisfied that the form has been accurately completed you may **SUBMIT** the form.

Note: The form will not submit if you have not completed all mandatory fields, you must therefore review the form and ensure that all mandatory fields are completed, before submitting the form.

Guidance: If the form will not submit and all mandatory fields have been completed, you should contact the Corporate Health and Safety team at: healthandsafety@edinburgh.gov.uk for support.

Note: Once submitted, any selected email addresses will receive a copy of the submission and the incident report will be sent to the main incident portal where it will be reviewed and approved by a member of the Corporate Health and Safety team.

49. If any further information is required, the person submitting the form may be contacted by either the Corporate Health and Safety Team, the Fire Safety Team or by a relevant Manager/Supervisor who needs to follow up or investigate.

Additional Information

50. Managers must ensure that all work-related incidents are entered onto the *myHS* Portal. They may do this themselves or delegate this to another person (e.g. a Business Manager or Business Support colleague). Regardless of the local arrangements in place, all incidents must be entered onto the *myHS* Portal within two working days.
51. Managers are responsible for ensuring that incidents are recorded and investigated, as well as providing support and feedback to the employee on any action that has been, or will be, taken.
52. Ensure you collate as much information as possible, including taking photographs of the incident area, obtain statements and reviewing risk assessments.
53. Depending on the nature of the incident, Corporate Health and Safety Team may opt to investigate and produce a report outlining findings and recommendations.
54. You are reminded that when Health and Safety request information you are legally required to cooperate with any incident investigation.

Part 2: Useful Links

Please see below some further documents which you may find useful in relation to accidents and incidents.

There is guidance about incident reporting and system user guidance available on the [Incident Reporting](#) Orb page.

There is guidance available to assist License Holders with logging-in to the system and navigating Incident Records:

- [Download the Short guide to log-in and authentication](#)
- [Download the Short guide to navigating Incident Records](#)

It is also recommended that Managers and Supervisors in service areas are familiar with the CEC [Health and Safety Incident Investigation Guidelines](#).

If there are any issues accessing or using the myHS Portal please contact healthandsafety@edinburgh.gov.uk.