Health and Safety

Planon Software Suite

Version: L126

Planon
Building Connections

About this Document

Intended Audience

This document is intended for *Planon Software Suite* users.

Contacting us

If you have any comments or questions regarding this document, please send them to: support@planonsoftware.com.

Document Conventions

Bold
Names of menus, options, tabs, fields and buttons are displayed in bold type.

Italic text
Application names are displayed in italics.

CAPITALS
Names of keys are displayed in upper case.

Special symbols

	Text preceded by this symbol references additional information or a tip.
	Text preceded by this symbol is intended to alert users about consequences if they carry out a particular action in Planon.

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About the Health & Safety solution

Planon's **Health & Safety** solution is designed for health and safety (EHS) officers, who are responsible for analyzing and registering the risks that employees face in the workplace and for informing them adequately and timely about this. The Health & Safety solution can be configured in such a way that the various Planon client applications will give health and safety information at the right time, at the right place and to the right people.

The solution consists of various TSIs. See Health & Safety solution - TSIs for more details.

Concepts

The following topics describe the concepts that are key to understanding the functionality.

Hazard

A hazard is a potential source of harm or adverse health effect on a person or persons.

Workplace hazards can come from a wide range of sources. Generally, hazards refer to all substances, materials, processes, actions, etc. that can cause damage or adverse effects to a person or property. Workplace hazards also include practices or conditions that release uncontrolled energy like objects falling from heights, chemical reactions, released pressure, kinetic energy or electrical energy.

In Planon ProCenter, hazards can be registered in the Hazard registry.

Hazardous component

Hazardous components contain potentially harmful substances / items / materials. You can register harmful components in Supporting data > Hazardous components. See Hazardous components for the procedure.

Hazardous components are registered in the Hazard registry, where you can link them to hazard types, properties, spaces and assets.

Example: the *heat shield* (= hazardous component) in a *boiler* (= asset), which contains *asbestos* (= hazard type).

Hazard relevancy

Per work-related activity, it is possible to hide hazard information that is not relevant to the activity. As a result, this information will not be displayed to field engineers / tradespeople who are performing this activity.

In the **Health & safety** TSI, you can configure this by adding **Hazard relevancy** records for a work-related activity type. If a hazard is defined as being 'Not relevant' for an activity, it is not shown in the **Show hazards** pop-up in ProCenter, nor will it be displayed to app users (AppSuite or Planon app).

If you have not defined any hazard relevancy for the type of activity, all health & safety information linked to the job's location (related property, space, asset) or to the activity type, will be shown to the field engineer / tradesperson.

See Configuring hazard relevancy for an activity type.

Last minute risk assessment

The Last Minute Risk Assessment or LMRA is a brief generic questionnaire about the risks associated with the work to be performed. It is shown just before work starts and must be carried out there and then.

LMRA questionnaires can be configured in **Questionnaires**. They can be activated for the apps in:

- AppSuite EHS Order settings.
- Planon app > PMFS solution Health and safety settings.

In both apps, the LMRA questionnaire is displayed in **Health & safety wizard** if a health and safety check is configured for the job. See AppSuite > Health & safety wizard or Planon PMFS > app Accepting and starting a work assignment for more information.

In the back-office, the answers to the LMRA questionnaire are stored as order details. Therefore, it is recommended to configure the **Last minute risk assessment** selection step at **Order details** and the **Answer lines** at **Order subdetails** in **Work Orders** .

For more information on configuring LMRAs for Planon AppSuite, see AppSuite Configuration Guide > Configuring a 'Last minute risk assessment' and Questionnaire configuration (AppSuite). For more information on configuring LMRAs for Planon app > PMFS solution, see Configuring generic Health and Safety settings.

In the **Health & safety** TSI, you can also configure another type of risk assessment: 'dynamic' risk assessments. This type of risk assessment is only shown to engineers / tradespeople at the relevant time during the work, and only for relevant activities and locations.

Risk assessment

Method statement

A method statement is a type of health and safety document that people use for high-risk work.

A method statement describes the steps / precautions that workers must take to carry out a particular job safely. Primarily, they are for the benefit of those who will be physically carrying out the work.

In Planon's **Health and Safety** TSI, you can register and link the method statements that apply to work-related activities. Method statement documents are stored as communication logs.

In AppSuite or the Planon PMFS app, field engineers will be provided with relevant job-related method statements via the linked work-related activities.

Risk assessment

For people doing high-risk work, a risk assessment might be a legal requirement.

The risk assessment identifies potential hazards in the workplace. It is an analysis and evaluation of the likelihood that these hazards will occur, and who might potentially be harmed. A risk assessment also provides the measures to reduce or mitigate those hazards.

In Planon's **Health and Safety** TSI, you can configure the risk assessments that are relevant for your organization. Risk assessments are either *documents* (stored as communication logs) and/or *questionnaires*. They can be specific to a **work-related activity** (e.g. welding / working at heights) or be specific to a **hazard type** (e.g. asbestos / chemicals / high voltage).

For more details about risk assessments in the Planon app > PMFS solution, see Health and safety in the PMFS solution or in Planon AppSuite see Questionnaire configuration (AppSuite)).

In the apps, relevant risk assessments will be shown to the field engineer before or during work, based on the job's context (property, space, asset, activity type). Field engineers should read the risk assessment documents and/or fill in the questionnaires.

Last minute risk assessment

Work-related activity type

A work-related activity type is a predefined activity that is very likely to be performed during maintenance work or facility management tasks and that is also likely to be affected by one or more hazards from the **Hazard registry**.

Work-related activities play a crucial role in showing the appropriate health & safety information for an order. You start by adding all the work-related activity types that frequently occur in preventive / reactive maintenance or in Facilities Management. The next step in the configuration is linking these work-related activity types to:

- risk assessments
- method statements
- order 'context' (for example **Order group**, **Standard order**, **Activity definition**, **SLA**)

A comprehensive configuration ensures that the appropriate health & safety information is shown to field engineers on their app (Planon app or AppSuite), at the right moment in the workflow.

The list of pre-defined activity types can grow quite long. It can contain both *generic* and *specific* activity types.

Field engineers only need to be able to select the *generic* (most commonly used) activity types from the list when they create a job for themselves or a colleague on their mobile device. Examples of generic work-related activity types are:

- drilling
- welding
- cabling
- cleaning
- etc.

In the **Is common?** field, you can indicate if a work-related activity type is generic or specific. See Adding work-related activity types for more information.

Health & Safety solution - TSIs

This section lists the TSIs that can be configured for Planon's **Health & Safety** solution.

- The **Hazard catalog** TSI is where you classify and define the types of hazards that apply to your organization. See Hazard catalog for more information.

  *In Planon Accelerator, this TSI is available on the navigation panel under **Supporting data**.*

- The **Hazard risk matrix** TSI is a tool to assess the potential damage of a hazard, based on the likelihood and severity factors. The likelihood and severity scores are multiplied to obtain a score value. This score is looked up in the risk ranges to determine the risk level. See Hazard risk matrix and asbestos assessment for more information.

  *In Planon Accelerator, this TSI is available on the navigation panel under **Supporting data**.*

- The **Hazardous components** TSI is where you add all the items in your buildings, spaces and assets that are potentially hazardous. This might be because they are involved in high-risk processes, or because they contain harmful substances, like asbestos. Examples of hazardous components: Sprayed coatings, Insulation board or particular types of Flooring.

  *In Planon Accelerator, this TSI is available on the navigation panel under **Supporting data**.*

- In the **Health & Safety** TSI you create links between the hazards from the **Hazard registry** and the *work-related activity types* during which these hazards may occur.

  *In Planon Accelerator, this TSI is available on the navigation panel under **Supporting data**.*

  In addition, you can link appropriate risk assessments (+ LMRA questionnaire) and method statements to work-related activity types.

  End users will see the configured health & safety information in the following applications:

  - *Planon App (PMFS solution)* and *AppSuite* - tradespeople / engineers are informed in advance about any known hazards they may encounter in the workplace and - more specifically - during which type of work-related activities.
  - *Planon ProCenter Web Client* - **Orders** - the **Show hazards** action enables you to quickly check hazards related to an order and/or maintenance activity. Via *cross module links* you can view hazards related to properties, spaces and assets.

- The **Hazard registry** TSI contains important master data for your Health & Safety solution. You can use it to register, configure and

locate all relevant hazards. Registration is done per property, space, asset or activity type. In your configuration, the registry is the single source of information with respect to the hazards in the workplace and the hazards that will potentially affect maintenance staff.

*In Planon Accelerator, this TSI is available on the navigation panel under **Core TSIs**.*

A properly maintained hazard registry supports you in:

- complying with legislation.
- organizing risk management activities.
- providing objective evidence of the risk management process and assurance of the effective management of hazards.
- continuously updating data throughout the life cycle of properties, spaces and/or assets.
- adequately informing the maintenance staff (on their mobile device).

A hazard is considered to be 'closed' if the safety risks associated with the identified hazards have been reduced to a level that is acceptable to the system owner and will not harm the workforce.

- In the **Permits** TSI, H&S officers can categorize, define and validate permits to work. To support the back-office, they can also configure a context-based process for automatically generating permits and linking these permits to the applicable new work orders or PPM orders. See Permits in the Planon WebHelp for more information about this TSI and the configuration of the automated process.

  *In Planon Accelerator, this TSI is available on the navigation panel under **Core TSIs**.*

- In the **Asbestos scores** TSI you can configure asbestos scores that specific to the HSG264 calculation method. See Configuring an asbestos assessment for more information.

  *In Planon Accelerator, this TSI is available on the navigation panel under **Supporting data**.*

Hazard catalog

In the hazard catalog you can define the hazards that you want to manage. Depending on the organization, the types of hazards can vary. For example, a university with laboratories will probably have to deal with different types of hazards than one without these facilities. **Hazard catalog** enables you to manage hazards through hazard classifications and hazard types.

Adding a hazard classification

Use the following procedure to define a classification structure for hazards.

Procedure

1. Go to Hazard catalog > Hazard classifications.
2. On the action panel, click Add.
3. In the data panel, enter a Code and Description to uniquely identify the hazard classification.

Examples of categories in a classification: Chemical hazards, Physical hazards, Biological hazards, Ergonomics hazards.

4. Click Save.

You have now added a hazard classification.

You can create a hierarchical structure for hazard classifications using the **Add sub** action.

Adding hazard types

Use the following procedure to define the various types of hazard that apply to your organization.

Procedure

1. Go to Hazard catalog > Hazard classifications.
2. Select the classification to which you want to add a hazard type.
3. Go to Hazard types.
4. On the action panel, click Add.
5. In the data panel, enter a Code and Description to uniquely identify the hazard type.

Examples of hazard types: *Bacteria and viruses* (under Biological hazards), *Radiation* (under Physical hazards), *Asbestos* (under Chemical hazards), *Vibration* (under Ergonomic hazards).

6. In the Assessment method field, choose one of the following methods:
   - **Basic**
   - **Asbestos (HSG264)**
   - **Risk matrix**

If you choose **Risk matrix** as assessment method, you must also select the **Risk matrix** to be applied.

For more information on risk matrix, see Adding a risk matrix.

7. If applicable, in the Risk assessment field, link a hazard-specific risk assessment.

This risk assessment may include a LMRA questionnaire.

8. Optional: On the action panel, click Link hazardous components. In the pop-up, link potentially harmful materials to the hazard type.
9. Click Save.

Adding a risk range

You can define various risk ranges per hazard type. Risk ranges are used to convert risk score to risk level.

Procedure

1. Go to Hazard catalog > Risk range.
2. On the action panel, click Add.
3. In the data panel, enter a Max value, a Min value and select a Risk level for the risk range.

> You can configure **Risk levels** for the pick list. For more information, see Configuring risk levels.

4. Click Save.

You have added a risk range.

Hazard risk matrix and asbestos assessment

This section explains how to set up a hazard risk matrix or an asbestos assessment.

Configuring a risk matrix

The risk matrix is used to assess the potential damage of a hazard, based on the likelihood and severity factors. The likelihood and severity scores are multiplied to obtain a score value. This score is looked up in the risk ranges to determine the risk level. An example of a hazard risk matrix is given below:

Risk score	Risk level category	Likelihood				
1 to 4	Low					
5 to 10	Moderate					
11 to 18	High	Rare (1)	Unlikely (2)	Possible (3)	Likely (4)	Almost certain (5)
19 to 25	Critical					
Severity	Catstrophic (5)	Moderate	Moderate	High	Critical	Critical
	Major (4)	Low	Moderate	High	High	Critical
	Moderate (3)	Low	Moderate	Moderate	High	High
	Minor (2)	Low	Low	Moderate	Moderate	Moderate
	Insignificant (1)	Low	Low	Low	Low	Moderate

Example, if Likelihood = Possible (3) and Severity = Major (4), the risk level is determined by severity * likelihood, which is 3*4 = 12. The score 12 falls in 'High' risk range.

The risk ranges are defined per hazard type. For more information, see Adding a risk range.

Adding a risk matrix

Procedure

1. Go to Hazard risk matrix > Risk matrix.
2. On the action panel, click Add.
3. In the data panel, enter a Code and Description to uniquely identify the risk matrix.
4. Click Save.

You have created a new risk matrix.

Adding a severity and likelihood

Use the following procedure to define a severity and likelihood for the selected risk matrix.

Procedure

1. Go to Hazard risk matrix > Details > Severity / Likelihood.
2. On the action panel, click Add.
3. In the data panel, enter a Code, Description and a relevant Score to define the severity / likelihood factors.
4. Click Save.

You have added a new severity / likelihood.

Configuring risk levels

You can define the risk levels that are relevant to your organization in the pick lists. Examples of risk levels are: low, medium, high.

Procedure

1. Go to Pick lists.
2. Select the Hazard risk level pick list from the list.
3. Go to Supporting data > Picklists.
4. Select the RISKLEVEL picklist.
5. Go to Pick list items.
6. On the action panel, click Add.
7. In the data panel, enter a Code and Name to uniquely identify the risk level.

> In Planon AppSuite, the lists of risk levels is sorted by code, so it is recommended to use alphanumerical codes that reflect the order of importance. Your configuration determines the position of a risk level in the list on the app.

8. Click Save.

You have added a new risk level.

Configuring an asbestos assessment

Materials containing asbestos were widely used within the construction industry for new and refurbished buildings until 1999. In that year they were banned, due to health and safety regulations. Asbestos does not impose a risk when left undisturbed. However, if it is disturbed and inhaled it can cause serious lung diseases.

For asbestos assessments, the UK government provides the HSG264 form, with a set of factors, based on materials and priorities. The condition of the material containing asbestos is assessed via a score on these factors. The asbestos factors can be registered in the Hazard registry TSI on the Hazard logs selection step.

Asbestos assessments are used in cases where the assessment method of the **Hazard type** is set to **Asbestos (HSG264)**. The risk score is read-only and calculated based on the values in 13 fields.

The following calculation factors are available:

Material assessment

Four factors determine how dangerous the material is. The **Material assessment** score is the sum of the scores of these four factors with a maximum score of 12.

- **Product type** - the asbestos material type used. Examples: Asbestos reinforced composites, Asbestos insulating board, Thermal insulation.

- **Extent of damage/deterioration** - describes the degree of damage or aging of the asbestos containing material. Examples: Good condition, Low damage, Medium damage.
- **Surface type/treatment** - describes how the material is applied. Examples: Composite materials containing asbestos, Unsealed asbestos insulating board.
- **Asbestos type** - the chemical structure of the asbestos. Examples: White (Chrysotile), Brown (Amphibole asbestos excluding crocidolite), Blue (Crocidolite).

Priority assessment

Nine factors in four categories determine the risks to daily operations. The score of **Priority assessment** is the sum of the four average scores, with a maximum score of 12. The four categories are:

- **Normal occupant activity score**,
- **Likelihood of disturbance score**,
- **Human exposure potential**,
- **Maintenance activity score**.

The scores are calculated as follows:

Normal occupant activity score - total score of the **Activity** factor, with a maximum score of 3:

- **Activity** - describes the normal occupant activity (how often a space is used). Examples: Rare, Low, Periodic.

Likelihood of disturbance score - the average score of the following factors with a maximum score of 3:

- **Location** - the location where the asbestos is identified. Examples: Outdoor, Warehouse, confined area.
- **Accessibility** - how easy is it to disturb the asbestos. Examples: Routinely disturbed, Easily disturbed, Usually inaccessible.
- **Extent of range** - what is the amount or surface. Examples: Less than 10 sq metres, 10 to 50 sq metres area, More than 50 sq metres.

Human exposure potential - the average score of the following factors with a maximum score of 3:

- **Number of occupants** - the number of people usually accessing the location. Examples: 1 to 3, More than 10.
- **Frequency of use of area** - how often is the location used. Examples: Daily, Weekly, Infrequent.
- **Average time area is in use** - the average time of occupancy of the location. Examples: Less than 1 hour, 3 to less than 6 hours, More than 6 hours.

Maintenance activity score - the average score of the following factors with a maximum score of 3:

- **Maintenance type** - what is the disturbance when maintenances activities are performed. Examples: Minor disturbance, Medium disturbance, High level disturbance.
- **Maintenance frequency** - how often will a maintenance activity performed. Examples: Unlikely, Less than once a year, Less than once a month.

The **Total score** of the asbestos assessment is the *sum* of the following scores with a maximum score of 24:

- **Material assessment score**
- **Priority assessment score**

The following applies to all average scores: if an average score contains decimals, these will be *rounded*, according to the rounding method that is selected in the **Hazard logs** business object settings in **Field definer** . The default rounding method is **Round up**, but you can also select **Round down** or **Round to nearest**.

For information on various rounding methods in calculations of the Priority score, see *Field definer* > *Setting for the Hazard Logs - Asbestos assessments business object*.

Adding asbestos scores

Use the following procedure to add elements of the HSG264 calculation method for asbestos scores.

Procedure

1. Go to Asbestos scores.

Select a selection step representing an asbestos factor for which you want to add scores.

2. On the action panel, click Add.
3. In the data panel, enter a Code and Description to uniquely identify the score and provide a Score value.
4. Click Save.

You have now added a score to an asbestos factor.

Configuring hazard presence

You can configure a list that describes the presence of hazardous materials.

Presumed, *Strongly presumed*, and *Known* are examples of defining the presence of a hazard.

Procedure

1. Go to Pick lists.

2. Select the Hazard presence pick list.
3. Go to Pick list items.
4. On the action panel, click Add.
5. In the data panel, enter a Code and Name for the presence definition.
6. Click Save.

You have added a new presence definition.

Hazard registry

In **Hazard registry** you can register hazards in the context of an associated property, space and/or asset. This hazard registry can be consulted by engineers working on site before starting their work. For example, if a field engineer has to work on an airco unit for which hazards are registered, the field engineer can properly assess any risks in advance.

Hazardous situations may change over time. Any changes can be tracked in **Hazard logs**.

Adding hazards

Procedure

1. Go to **Hazard registry** > **Hazards**.
2. On the action panel, click Add.
3. Complete the fields on the data panel.

For information on these fields, see Hazard fields.

4. Click Save.

If you want to find existing hazards, start by navigating to the **Filters** selection level and select a relevant selection step, such as **Hazard types**, **Hazardous components**, **Hazard classifications**, **Floors**, **Assets**, **Spaces** or **Work-related activity types**. Proceed by navigating down to the **Hazards** selection level and you will only see hazards that belong to the selected filter.

Adding a hazard log

You can add a hazard log based on an assessment method. There are four types of assessments available:

- Asbestos assessment based on HSG264 (asbestos assessment)
- Risk assessment based on a risk matrix (risk assessment)
- Calculating the risk level based on a score (basic hazard log)

- Selecting a risk level manually (basic hazard log)

Procedure

1. Go to Hazard registry > Hazard logs.
2. On the action panel, click to add any one of the assessments given below:
   - Add asbestos assessment
   - Add risk assessment
   - Add basic hazard log
3. Complete the fields on the data panel.

For information on these fields, see Hazard log fields.

4. Click Save.

Modifying a hazard log

You can add a modification based on the previous hazard log. This starts a new assessment with all field values from the previous hazard log.

Procedure

1. Go to Hazard registry > Hazard log.
2. On the action panel, click Add modification.

   A pop-up is displayed.
3. In the Modification start date-time field, enter the start date-time for the new assessment.
4. Click OK.

   The basic hazard log pop-up is displayed.
5. You can modify the fields as required. For more information on the fields, see Hazard log fields.
6. Click OK.

   A new assessment is created and the previous assessment is ended.

You can only add a modification to the latest hazard log (active or closed).

You can only add a modification if the assessment method of the hazard type matches the hazard log.

Copying a hazard to another space

You can copy a hazard, including its hazard log information, from one space to another space. This function can be useful, for example, if you want a quick and simple copy of specific hazard information for another space. But it is also useful when an existing space is ended and split into two or more new spaces. In that case, you can transfer an existing hazard and its hazard log / communication log information to the newly created space(s). In the **Copy hazard to space** dialog, you can also optionally end the original hazard record.

Procedure

1. Go to **Hazard registry** > **Hazards**.
2. Select the hazard you want to copy.
3. On the action panel, click Copy hazard to space.
4. In the dialog, select a **Start date-time** for the hazard in the new space.
5. Select the **Space** to which the hazard must be copied.
6. In the **End original hazard** field, select **No** if you want to preserve the hazard record with the original space, or **Yes** if you want to end the hazard record for the original space. As a result, the current date time will be filled in as **End date-time** for the original hazard.
7. In the **Copy communication logs?** field, select **Yes** if you want to include the communication logs of the original hazard in your copy. By default, this field is set to **No**.
   - If you copy communication logs with a 'non-secure' document reference, the file will not be duplicated, because both communication logs refer to the same file. For secure documents, the file will be duplicated.
   - If you set the **End the original hazard** field to **Yes**, the original communication logs will be deleted after the copy is made.
8. Click **OK**.
9. Refresh the **Hazards** element list to see the new hazard record, for the new space.

You may also have to adjust the reference date to see the relevant information.

The associated hazard log information is copied to the Hazard logs level.

Hazardous components

Use the following procedure to add a hazardous component.

Procedure

1. Go to Supporting data > Hazardous components.
2. On the action panel, click Add.

3. On the data panel, enter a Code and Description to uniquely identify the hazardous component.
4. Click Save.

Health & Safety TSI

In the **Health & Safety** TSI you create a *library* for health & safety information. The main functionality of the TSI is to define work-related health & safety information such as **Risk assessments**, **Method statements** and hazard relevancy, based on work-related activity types.

For each work-related activity, you can configure whether or not it will (potentially) be affected by a hazard form the **Hazard registry**. This is done by defining hazard relevancy for the work to be carried out. If a hazard is not relevant, because it does not affect the related activity, no information will go out. If the activity is potentially affected, the engineer / tradesperson will be informed. If you have not defined any hazard relevancy for the type of activity, all hazards linked to a work order's location will be shown to the field engineer / tradesperson.

For more information see: Risk assessment, Method statement and Hazard relevancy.

Adding work-related activity types

In the **Health & Safety** TSI, you configure the work-related activity types that are likely to be performed during maintenance work or facility management jobs and also likely to be affected by one or more hazards from the **Hazard registry**. The configuration includes making the relevant links to risk assessments, method statements and the *order context* in which they will apply. Based on these links and order context, the system will determine which activity types are expected for an order (job). Based on the expected activity types, field engineers are informed via their app (Planon app / AppSuite) about relevant hazards, method statements and risk assessments.

Procedure

1. Go to the Health & Safety TSI.
2. On the Health & Safety level, select the Activity types step.
3. On the action panel, click Add.
4. On the data panel, enter a Code and Description to uniquely identify the work-related activity type.

Examples of work-related activity types: Drilling, Cleaning, Cabling.

5. In the Is common? field, select Yes if you want to make it generically possible for users (field engineers) to add this work-related activity type to an order. Select No if you want to prevent this, because the activity type is too specific for general use.

6. Optional: in the Method statement and Risk assessment fields, select a relevant method statement / risk assessment.

   This method statement / risk assessment will be displayed to field engineers.

7. Click Save.

Proceed by making links to an appropriate *order context*, such as Order group, Standard order, Activity definition, SLA service, Service agreement service. This will ensure the display of the right information at the right time during the work.

These links can also be configured from the opposite direction: on the action panels of **Order groups**, **Standard orders**, **Activity definitions** etc, you can configure links to **Work-related activity types**.

For more information on adding **Links** to action panels, see *Layout panel* in the *Layouts* user documentation.

8. On the action panel, select the link(s) that best fit(s) your organization's work flows.

Do not overcomplicate your configuration with too many different links.

On the Details level, each type of link is represented by its own separate selection step. Only configure the selection steps that are relevant to your work flows.

9. If you want to prevent that irrelevant hazards are displayed for an activity, link Hazard relevancy records to the activity at Details > Hazard relevancy See Configuring hazard relevancy for an activity type.

Configuring hazard relevancy for an activity type

In the **Health & safety** TSI, you can prevent hazard information from being displayed if it is irrelevant for an activity type. You do this by configuring **Hazard relevancy** records. If a hazard is defined as 'Not relevant' for a particular activity type, it is not shown in the **Show hazards** pop-up in ProCenter and not displayed in the Planon app / AppSuite.

Example: if asbestos has been identified in a wall and the correct data is registered in Planon, this data can be used to alert engineers / tradespeople who are going to drill into the wall. However, a person who is cleaning the room does not need to receive this particular hazard notification. In that case, you can exclude hazard notifications on asbestos from basic cleaning activities.

1. At Health & safety > Activity types, select the work-related activity type from which you want to exclude hazard notifications.
2. Go to Details > Hazard relevancy.
3. On the action panel, click Add.
4. On the data panel, enter data, such as Code, Description, Hazard type, Hazard relevancy and the Work-related activity type.

With the above example in mind, the following data could be entered: the Hazard type = *Asbestos*, the Hazard relevancy = *Not relevant* and the Work-related activity type = *Basic cleaning*.

5. Click Save.

   Hazard notifications on the selected hazard type (asbestos) are not displayed to end users who perform the selected work-related activity type (basic cleaning activities).

Adding method statements

In the **Health & Safety** TSI, you configure the method statements that are likely to apply during maintenance work or facility management jobs.

Procedure

1. Go to the Health & Safety TSI.
2. On the Health & Safety level, select the Method statements step.
3. On the action panel, click Add.
4. On the data panel, enter a Code and Description to uniquely identify the method statement.
5. Click Save.
6. Go to the Details > Communication logs selection level to link /upload the actual document(s).
7. On the action panel, click the Add communication log action.
8. On the data panel, enter a Code and Description to uniquely identify the communication log.
9. Complete the other fields on the data panel.
10. Depending on you organization's policy, upload the actual method statement document in the Document reference field or the Document (secure) field.
11. Click Save.

    The method statement can now be linked to a work-related activity.

Adding a risk assessment

In the **Health & Safety** TSI, you configure the risk assessments that are likely to apply during maintenance work or facility management jobs.

Procedure

1. Go to the Health & Safety TSI.
2. On the Health & Safety level, select the Risk assessments step.

3. On the action panel, click Add.
4. On the data panel, enter a Code and Description to uniquely identify the risk assessment.
5. If applicable, link an LMRA questionnaire to the risk assessment in the Questionnaire field.

   In Planon AppSuite, this LMRA questionnaire will be displayed for each selected work-related activity involved in the job that is also linked to this risk assessment. In such cases, field engineers must fill in the risk assessment questionnaire before they can start / continue their work.
6. Click Save.
7. Go to the Details > Communication logs selection level.
8. On the action panel, click the Add communication log action.
9. On the data panel, enter a Code and Description to uniquely identify the communication log.
10. Complete the other fields on the data panel.
11. Depending on you organization's policy, upload the actual risk assessment document in the Document reference field or the Document (secure) field.
12. Click Save.

    The risk assessment can now be linked to a work-related activity.

Field descriptions

Hazard fields

Field	Description
Assessment required?	Indicate if an assessment is required for a newly registered hazard or not. The default value is **Yes**. Health & safety officers can decide what actions to take for new hazards that must be assessed, for example determine a risk level or do a full assessment for dangerous components like asbestos.
Asset	If the hazard applies to an asset, select the asset from the list.
Description	Enter a relevant description of the hazard.
End date-time	The end date-time is populated automatically after the hazard ceased to exist.
External ID	Enter the hazardous element identification number received from an external survey company.
Follow-up action details	This read-only field displays the follow-up actions (if any) that are linked to the hazard.
Hazard type	Select a hazard type from the list.
Last assessment date	The date on which the hazard was last assessed is automatically populated here.
Location details	Enter detailed location information.
Next assessment date	If applicable, select a date on which the hazard must be re-evaluated.
Presence	The current status of the presence selected in the hazard log is displayed here.
Property	Select the property where the hazard is located.
Risk level	Based on the assessment in the hazard log, the current status of the risk level is displayed here.

Field	Description
Space	If the hazard applies to a space, select the space from the list.
Start date-time	Enter the start date-time of the hazard.

Hazard log fields

Field	Description
Basic hazard log fields	
Hazard	Select a hazard from the list.
Presence	Select the current status of the hazard.
	You can configure the content of this pick list. For more information, see Configuring hazard presence.
Start date-time	Specify the start date-time of the hazard log.
End date-time	Specify the date-time when the hazard is completely eliminated.
Score	Enter a score to calculate the risk level.
Risk level	Select a relevant risk level from the list.
Asbestos assessment fields	
Material	
Product type	Select an asbestos product type from the list.
Extent of damage	Select the type of damage (if any) to the asbestos containing material.
Surface type	Select a surface type from the list.
Asbestos type	Select an asbestos type from the list.
Priority	

Field	Description
Activity	Select the type of disturbance activity associated with the asbestos containing material.
Location	Select the type of location where the asbestos containing material is situated.
Accessibility	Select the accessibility of asbestos containing material from the list.
Extent range	Select the area in which the asbestos containing material is extended.
Number of occupants	Specify the approximate number of occupants in the selected area.
Frequency of use of area	Specify how often the area with the material containing asbestos is used by the occupants.
Average time area is in use	Select the average duration the area is occupied.
Maintenance type	Specify how likely it is that the material containing asbestos is disturbed during a maintenance activity.
Maintenance frequency	Specify how frequently the material containing asbestos needs to be accessed for maintenance.
Level	
Material score	Displays the score calculated on the basis of the factors and their respective scores selected in the 'Material' factors.
Priority score	Displays the score calculated on the basis of the factors and their respective scores selected in the 'Priority' factors.
Risk assessment fields	
Severity	Select the severity of the risk.
Likelihood	Select the likelihood of the risk.

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