



# PACE ESSENTIALS MANUAL HEALTHY WORKING

VERSION 1.3



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## 1.0 PACE Basics

### 1.1 Logging In



The screenshot shows the PACE Login page. At the top, there is a dark blue header with the PACE logo on the left and a 'Login' link on the right. Below the header is a light green horizontal bar. The main content area is white and contains a central login form. The form has a title 'Login' and two input fields: 'User ID' and 'Password'. Below the 'Password' field is a link that says 'Set new password'. At the bottom right of the form is a green 'Login' button with a right-pointing arrow. At the very bottom of the page, there is a small copyright notice: '© Cardinus Risk Management'.

Your Cardinus contact will be able to provide you with a link to your PACE system. They should also provide you with your User ID. The first time that you log in you will need to use the **Set new password** link to set your password.



The screenshot shows the PACE Set new password page. At the top, there is a dark blue header with the PACE logo on the left and a 'Login' link on the right. Below the header is a light green horizontal bar. The main content area is white and contains a central form titled 'Set new password'. The form has two input fields: 'User ID' and 'Email address'. At the bottom right of the form is a green 'Submit' button with a right-pointing arrow. At the very bottom of the page, there is a small copyright notice: '© Cardinus Risk Management'.

Click **Set new password** and enter your **User ID** and **Email address**. Click **Submit**. You will be sent an email, use the link it contains to create your password. Once your password has been created you will be able to log on to the system.

## 1.2 Navigation and Dashboards



Once you have created your new password, you will be able to access PACE proper. Your PACE home page may not look exactly like the one pictured above but the general features will be present:

- The PACE logo in the top left-hand corner acts as a link back to the home page from anywhere in PACE.
- The browser back button will take you back one level in any menu.
- Along the top of the screen are icons that link to the major PACE functions:
  - Training
  - Risk Manager
  - Case Manager
  - Users
  - Reporting
  - Email
  - Programmes
  - Administration

Clicking the icon will either take you directly to the function, or, where that area of PACE has more than one section, produce a drop-down menu of those different sections.

**NOTE - It is possible that you may not see all of the above options; the full list assumes that you have access to all areas of PACE.**

- The **Notifications** box on the right-hand side of the screen is used to alert you to anything that requires your attention. There will, in all likelihood, be no Notifications when you log in for the first time, but as you use PACE over time you may start to see:
  - **Task notifications** – Here you will see the number of outstanding Tasks (Tasks which have not yet been marked as completed) and overdue Tasks (Tasks which are not yet marked as complete and the **'Required by'** date of which has passed). Clicking the notification will take you to the Case Manager.
  - **Training records** – it shows you training records that have been created in the last 7 and 14 days.
  - **Risk Assessment records** – it depicts risk assessment records created in the last 7 and 14 days.
  - **Assessor led assessments** – if you have created or been allocated any ergonomic desk assessments as a system administrator you will be able to see them by clicking on the appropriate link.
  - **Schedule notifications** – these alert you when there are email schedules that require authorisation. Clicking on this link will take you to a list of the emails requiring approval.



The final part of the home page is the dashboard. Again, yours may look a little different to that pictured as this reflects data from a system that has been running for some time. Dashboards offer an at-a-glance overview of the status of your programmes.

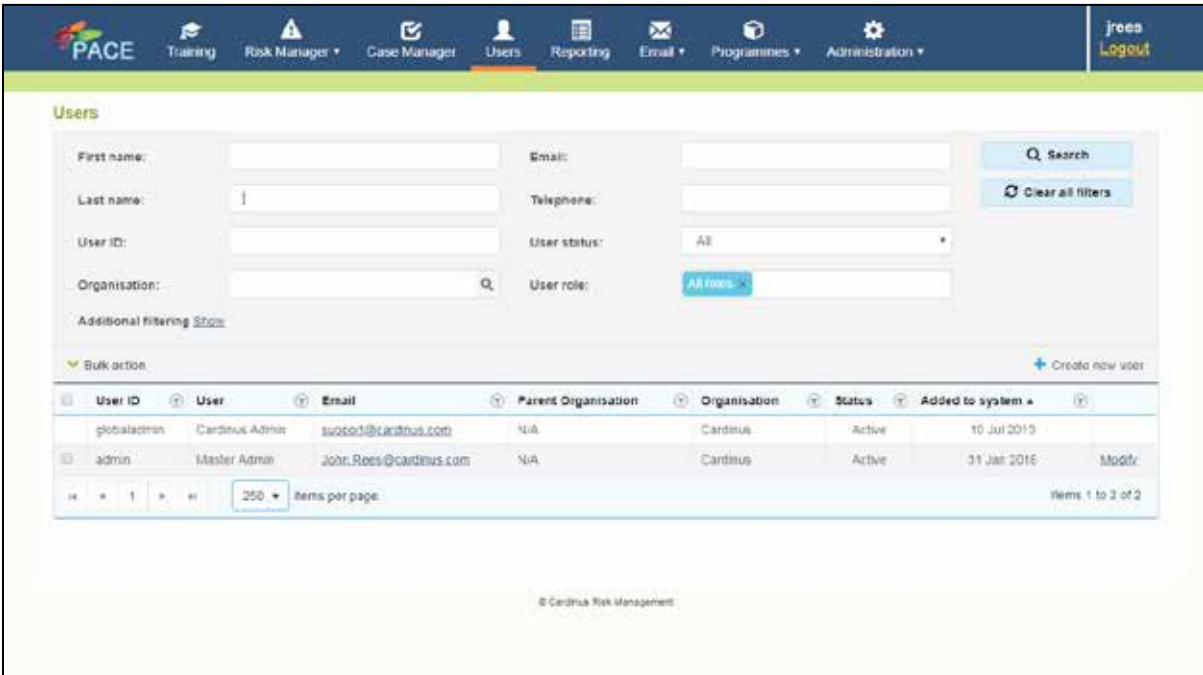
**NOTE - Your dashboards are updated several times during the day, but they are not “real-time”. You will see in the top left-hand corner a statement as to the date that they were last updated.**

- The **Risk Assessment Status** dashboard displays a simple pie chart telling you the proportion of users who have completed at least one Risk Assessment. The green area represents users who have completed an assessment; grey represents those who have not.

- The same applies to the **Training Status** dashboard, although this one refers to how many users completed their elearning. As risk assessments tend to be completed after training it is not unusual for the **Training Status** dashboard to show a slightly higher level of compliance than you see on **Risk Assessment Status**.
- **Compliance Trend** shows you how the percentage of users who are considered “compliant” has changed over time.
- **Original Risk Status** charts the proportion of High, Medium Low and No (None) risk recorded on your risk assessments.
- **Current Risk Status** charts the proportion of High, Medium Low and No (None) risk in your risk assessments once any remedial actions have been taken into account.
- **Risk Trend** charts the proportion of high medium and low risk over a period of time.

## 2.0 Users Menu

### 2.1 User search



**Users**

First name:  Email:

Last name:  Telephone:

User ID:  User status:

Organisation:  User role:

Additional filtering [Show](#)

Bulk action: [Create new user](#)

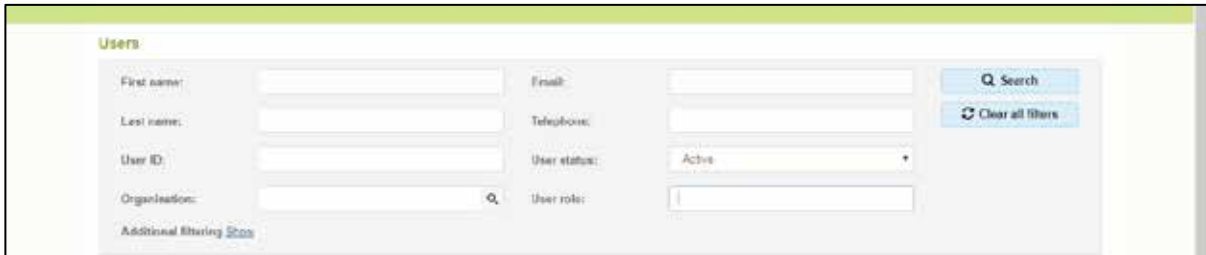
User ID	User	Email	Parent Organisation	Organisation	Status	Added to system
globaladmin	Cardinus Admin	swocod@cardinus.com	N/A	Cardinus	Active	10 Jul 2013
admin	Master Admin	john.roes@cardinus.com	N/A	Cardinus	Active	31 Jan 2016

1 250 Items per page. Items 1 to 2 of 2

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Clicking on the Users icon takes you to the Users List screen. From here you can search for specific Users (or groups of Users), amend User details and create new Users.

Unless you are looking to create a new User you will generally start with a User search.



Most searches are based on the User's **First name**, **Last name**, **User ID**, **Organisation**, **User Status** or **User Role** (course user, master administrator, sub administrator etc)

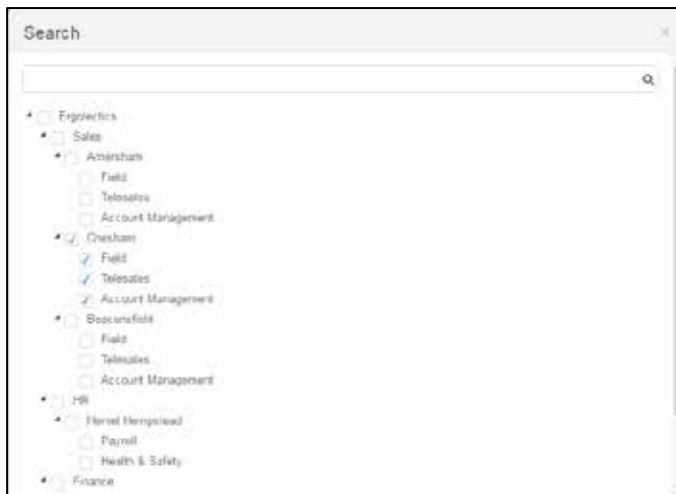
When searching by First name, Last name or User ID the search setting is a “contains” search. That means that all records where the field you are searching contains the characters you entered in that order. So if you search on “hris” in **First name**, it would return every user called “Chris”, “Christopher”, “Christian” or “Christine” but not a user called “Kris”.

The search option, **Organisation**, is a little different. This is a “lookup” search, as indicated by the magnifying glass icon at the end  of the field.

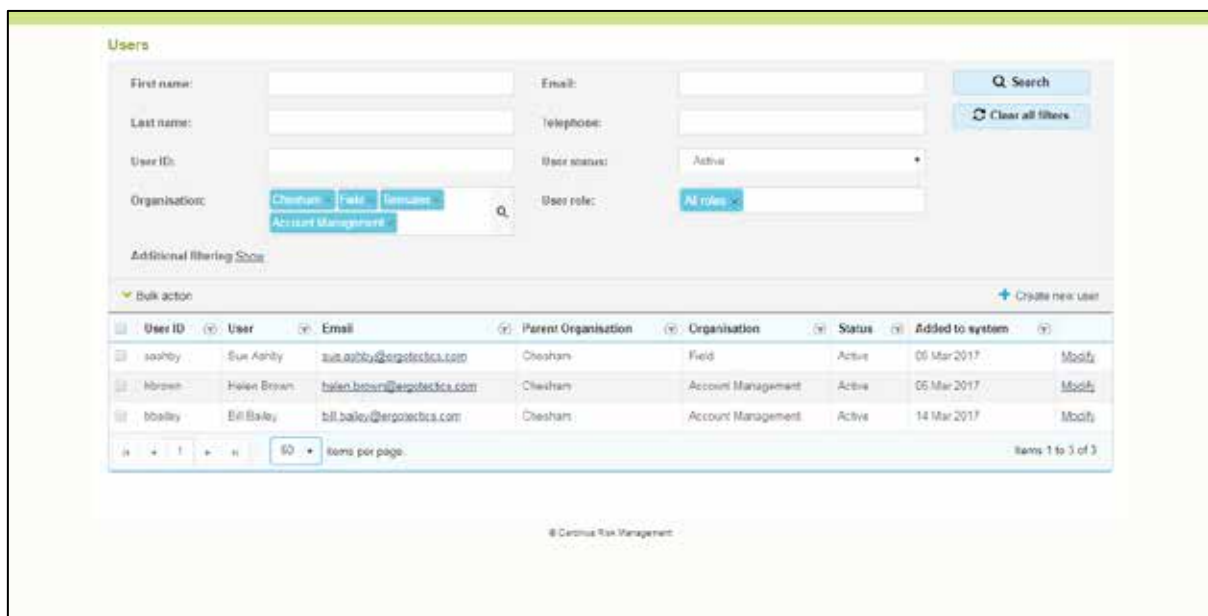


Click that icon to open the Organisations lookup window. This displays a list of all Organisations in your system. To select a specific part of the organisation click on the box next to the name of that part of the organisation. To select any sub organisations click the box twice. In the example below the sub organisations for Chesham have been selected by clicking on the box for Chesham twice.





Click on OK and the parts of the organisation selected will be displayed in the User search screen. Clicking on Search will then bring up the names associated with those.



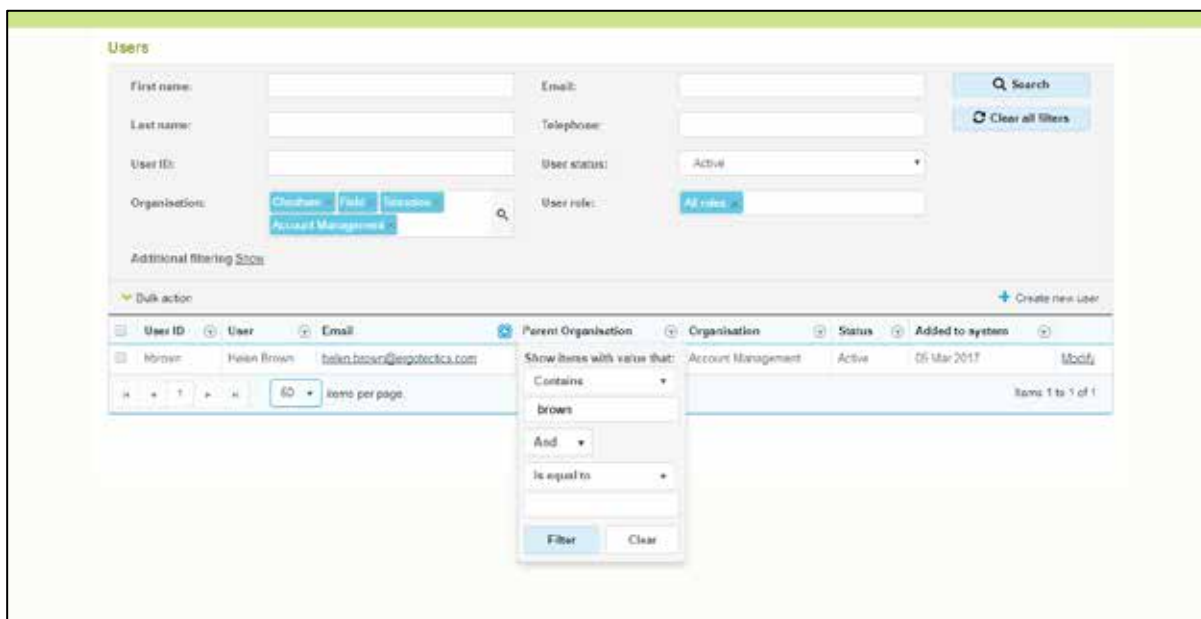
Once you have your search results, you have the ability to further refine your data. This can be done either by clicking on the column headers to sort the data in alphabetical or numerical order or with the filters using the icon that appears to the right of each column heading.

Text fields can be filtered to include only exact matches ("Is equal to"), exclude exact matches ("Is not equal to"), or to look for partial text ("Starts with", "Contains", "Does not contain", "Ends with"), and again you can apply more than one criterion.

The search option **User Status** allows you to search for users based on whether they are active users, archived users, suspended or long term absent. There is also an 'All' option in this filter. By default when users are created they will be 'active' but when they leave they will be set to 'archived'. The Long term absent category can be used for sickness, maternity or other forms of absence. Suspended means that the user is still part of the active database but that scheduled emails will not be sent to that user.



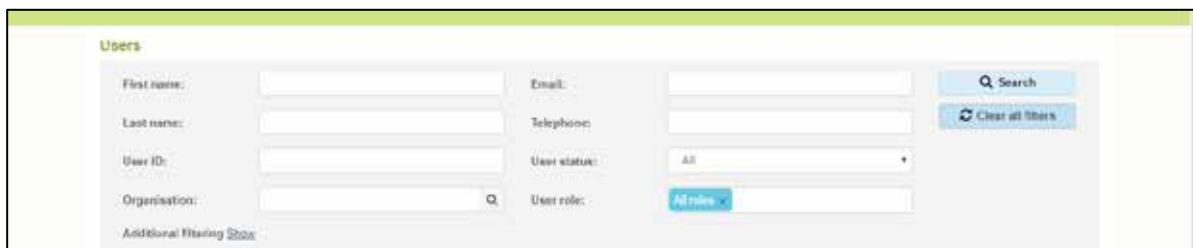
In the example shown below the **Email address** has been filtered for someone **containing Brown** in their name.



The screenshot shows the 'Users' management interface. At the top, there are search and filter controls. The 'Email' field is selected, and a filter is applied: 'Contains brown'. The results table below shows a single user, Helen Brown, with the email helen.brown@esptectica.com. The table has columns for User ID, User, Email, Parent Organisation, Organisation, Status, and Added to system. A 'Filter' button is visible at the bottom of the filter dropdown.

This yields the results where anyone with the letters **Brown** in their email address is found.

### Additional filtering



The screenshot shows the 'Users' management interface. The 'Additional filtering' dropdown menu is open, showing a list of fields: First name, Last name, User ID, Organisation, Email, Telephone, User status, and User roles. The 'Show' button is highlighted.

The final filtering option allows administrators to search by additional fields in the users' records. Clicking on **Show** reveals a drop down menu that has the additional fields available.

**Users**

First name:  Email:  [Search](#)

Last name:  Telephone:  [Clear all filters](#)

User ID:  User status:  [Add roles X](#)

Organisation:  [Clear additional filter](#)

**Additional filtering hide**

[Clear additional filter](#)

**Bulk**

- ☐ Privacy statement enabled
- ☐ Privacy statement agreed
- ☐ Show welcome HSE video
- ☐ Personal Identifier
- ☐ Date of Last Assessment

	mail	Parent Organisation	Organisation	Status	Added to system	
<input type="checkbox"/>	ppoon@cardinus.com	N/A	Ergotectics	Active	10 Jul 2013	
<input type="checkbox"/>	fm.rees@cardinus.com	N/A	Ergotectics	Active	31 Jan 2016	<a href="#">Modify</a>
<input type="checkbox"/>	h.reece@cardinus.com	Hemel Hempstead	Health & Safety	Active	23 Mar 2010	<a href="#">Modify</a>
<input type="checkbox"/>	John Smith	John Smith@ergotectics.com	Amersham	Field	Active	03 Mar 2017 <a href="#">Modify</a>
<input type="checkbox"/>	Alison Bennett	Alison.Bennett@ergotectics.com	Beaconsfield	Telecare	Active	03 Mar 2017 <a href="#">Modify</a>
<input type="checkbox"/>	Fiona Bignall	fiona.bignall@ergotectics.com	Beaconsfield	Account Management	Active	03 Mar 2017 <a href="#">Modify</a>
<input type="checkbox"/>	Sue Robby	sue.robby@ergotectics.com	Chesham	Field	Active	05 Mar 2017 <a href="#">Modify</a>
<input type="checkbox"/>	Helen Brown	helen.brown@ergotectics.com	Chesham	Account Management	Active	05 Mar 2017 <a href="#">Modify</a>

In this case the filter is on the last assessment date being before 1/02/16 and has found 1 person.

**Additional filtering hide**

Date of Last Assessment  Is before  01/03/2016 [Clear additional filter](#)

**Bulk action** [Create new user](#)

User ID	User	Email	Parent Organisation	Organisation	Status	Added to system	
<input type="checkbox"/>	Helen Brown	helen.brown@ergotectics.com	Chesham	Account Management	Active	05 Mar 2017	<a href="#">Modify</a>

Items per page: 50 Items 1 to 1 of 1

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## 2.2 Amending User Details

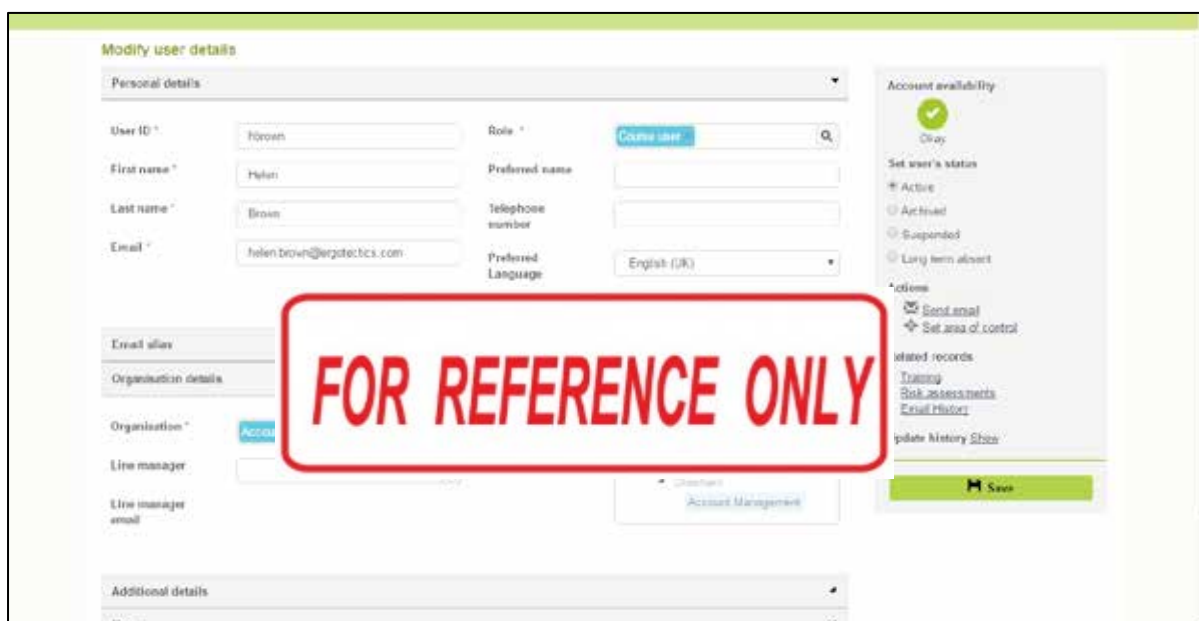
### 2.2.1 Modify user details screen

Please note you must not change any user details apart from marking them as 'long term absent' or 'suspended' as all other details are updated via an overnight upload.

User ID	User	Email	Parent Organisation	Organisation	Status	Added to system	
fbrown	Helen Brown	helen.brown@ergotecics.com	Chesham	Account Management	Active	05 Mar 2017	Modify

Click **Modify** to amend a Users' details.

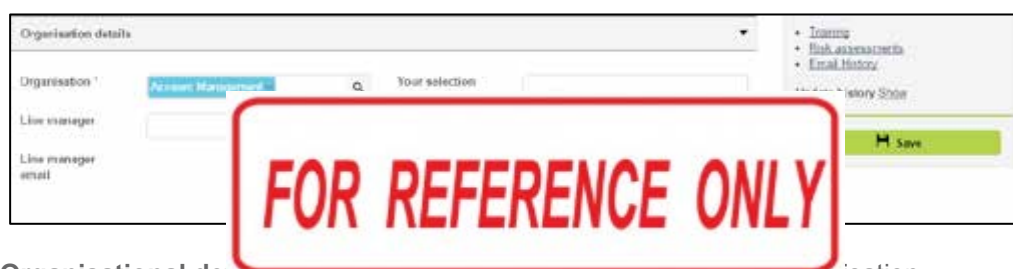
**NOTE** - Users should have their User Status amended to "Archived" (see below) if you want to effectively exclude them from the system.



In the **Modify user details** screen you can amend any detail for that User. The **Personal Details** section relates to basic User information such as name and contact details and it includes their **User ID**. This section also includes the option to change the role for the user. For most users they will have the role Course user but there are other roles such as administrator which can be set by another administrator.



**Email Alias** allows you to set an email alias for a user that has to send out emails. This could be the name of the user or it could be a department name. In any event the From email address should be set to [pacesystem@cardinus.com](mailto:pacesystem@cardinus.com) so that issues with the firewall with incoming emails are avoided.



Organisational details

**NOTE** - Be very careful about changing *User IDs*. These uniquely identify the User in the system and are often used to link PACE to other systems. Changing the User ID could prevent certain processes from functioning or could lead to the creation of duplicate User records.

The exact contents of the **Additional details** section will be defined during the initial set up of your system and may vary from those pictured.

## 2.2.2 Modify user details side panel

**Account availability**

☒ Okay

**Set user's status**

☒ Active

☐ Archived

☐ Suspended

☐ Long term absent

**Actions**

☒ [Send email](#)

☒ [Set area of control](#)

**Related records**

- [Training](#)
- [Risk assessments](#)
- [Email History](#)

**Update history** [Show](#)

**Save**

The panel in the top right-hand corner offers further options for amending user details.



**Account Availability** signals whether the User is **Okay** or **Locked**. If "Locked" you can [Unlock user account](#).

**Set user's status.** The default is **Active**. Use **Archived** for users who have left the Organisation, **Suspended** to temporarily suspend the users account and **Long term absent** for users on long term leave.

[Show](#) / [Hide](#) **Update history** (pictured below).

Update history <a href="#">Hide</a>	
Created by	Master Admin
Created date	05/03/2017
Modified by	Helen Brown
Modified date	05/03/2017

**Save**

[Send email](#) – this is covered in more detail below

[Set area of control](#) – this is covered in more detail below

### 2.2.3 Sending the User an email

Clicking the [Send email](#) link in the side panel opens the standard **Send an email** screen. Here you can either choose a pre-existing email from the **Template** drop-down list or use the large text box at the bottom of the screen to compose your own emails. Click **Send** when you are happy with your email. You can also use cc or bcc to copy in others.

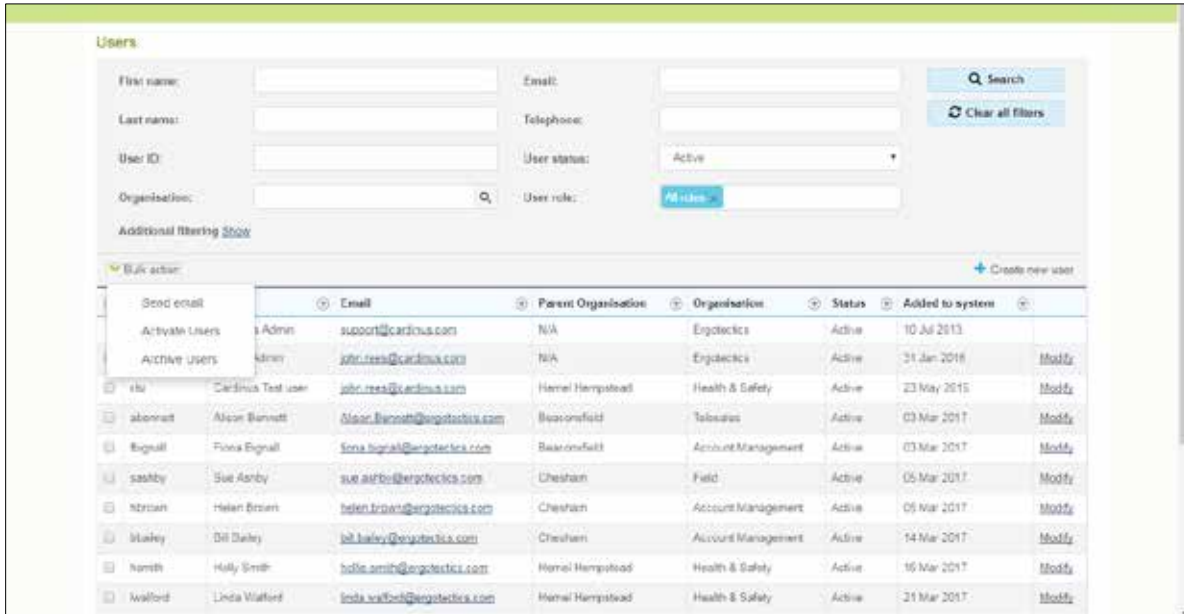
### 2.2.4 Set user's area of control

It is possible to limit administrator access to one or more parts of the Organisation. Clicking Set user's area of control opens the pictured window. Organisations are added to that user's area of control simply by checking the box next to that Organisation.

**FOR REFERENCE ONLY**

When you are happy with the organisations you have assigned, click Save and close.

### 2.2.5 The Bulk Action drop-down list



The screenshot shows the 'Users' management page. At the top, there are search and filter fields for First name, Last name, User ID, Organisation, Email, Telephone, and User status. Below these is a 'Bulk action' dropdown menu that is currently open, showing options: 'Send email', 'Activate Users', and 'Archive Users'. Below the menu is a table of users with columns: Email, Parent Organisation, Organisation, Status, and Added to system. Each row has a checkbox for selection and a 'Modify' link.

	Email	Parent Organisation	Organisation	Status	Added to system	
<input type="checkbox"/>	support@cardinus.com	N/A	Ergotectics	Active	10 Jul 2013	
<input type="checkbox"/>	john.rees@cardinus.com	N/A	Ergotectics	Active	31 Jan 2018	<a href="#">Modify</a>
<input type="checkbox"/>	Cardinus Test user					
<input type="checkbox"/>	John Rees	Hemel Hempstead	Health & Safety	Active	23 May 2015	<a href="#">Modify</a>
<input type="checkbox"/>	Aileen Bennett	Bishopsfield	Telecoms	Active	03 Mar 2017	<a href="#">Modify</a>
<input type="checkbox"/>	Fiona Egnall	Bishopsfield	Account Management	Active	03 Mar 2017	<a href="#">Modify</a>
<input type="checkbox"/>	Sue Ashby	Chesham	Field	Active	05 Mar 2017	<a href="#">Modify</a>
<input type="checkbox"/>	Helen Brown	Chesham	Account Management	Active	05 Mar 2017	<a href="#">Modify</a>
<input type="checkbox"/>	Bill Bailey	Chesham	Account Management	Active	14 Mar 2017	<a href="#">Modify</a>
<input type="checkbox"/>	Holly Smith	Hemel Hempstead	Health & Safety	Active	16 Mar 2017	<a href="#">Modify</a>
<input type="checkbox"/>	Linda Watford	Hemel Hempstead	Health & Safety	Active	21 Mar 2017	<a href="#">Modify</a>

One option for amending user details is provided by the Bulk **Action** drop-down list above the user grid. This differs from the methods covered so far in that it is possible to make the same amendment to multiple users at the same time. The **Action** that you choose is applied to all users with a check in the box next to their **User ID**.

With the Bulk **Action** drop down list you can:

- Change selected users' statuses to:
  - Active
  - Archived
- Send an email. The email you write goes to all selected users, but the **Send an email** screen is no different from that pictured in section 2.2.3.

## 2.3 Creating Users

To create a User you must at least provide:

- User ID – (this must be unique)
- First name
- Last name
- Email Address
- Organisation

**FOR REFERENCE ONLY**

The new User's status will default to **Active** - it is unlikely that you would want it to be anything else.

The **Role** is by default set to Course User however other roles can be assigned such as PACE administrator or Master administrator. These are described in section 2.4.

As noted in section 2.2.1, *Additional details* refers to other information that can be collected about the User. The exact range of options in this section is configured during the initial set up of your system and may not match what you see.



## 2.4 Roles & Rights

In order to perform any action in PACE or the User Hub, a user must have been allocated the “rights” to perform that action. To save administrators the trouble of minutely deciding for each user exactly which rights they will need, “rights” are allocated through the assignments of “roles” that collect relevant rights into a single group. The standard “roles” provided by the PACE system are:

Master Administrator	A user with administrator rights with access to almost every aspect of PACE – the Master Administrator is likely to focus on the day-to-day running of the system.
Sub Administrator	A user with administrator rights who is limited to a specified “area of control”.
Course User	A user who can access the Course Hub but who has no access to PACE.
Assessor	A user with administrator rights who can access certain parts of the PACE database for the purpose of recording assessment notes
Cardinus Customer Service	Allows Cardinus customer service to assist with PACE management and customisation

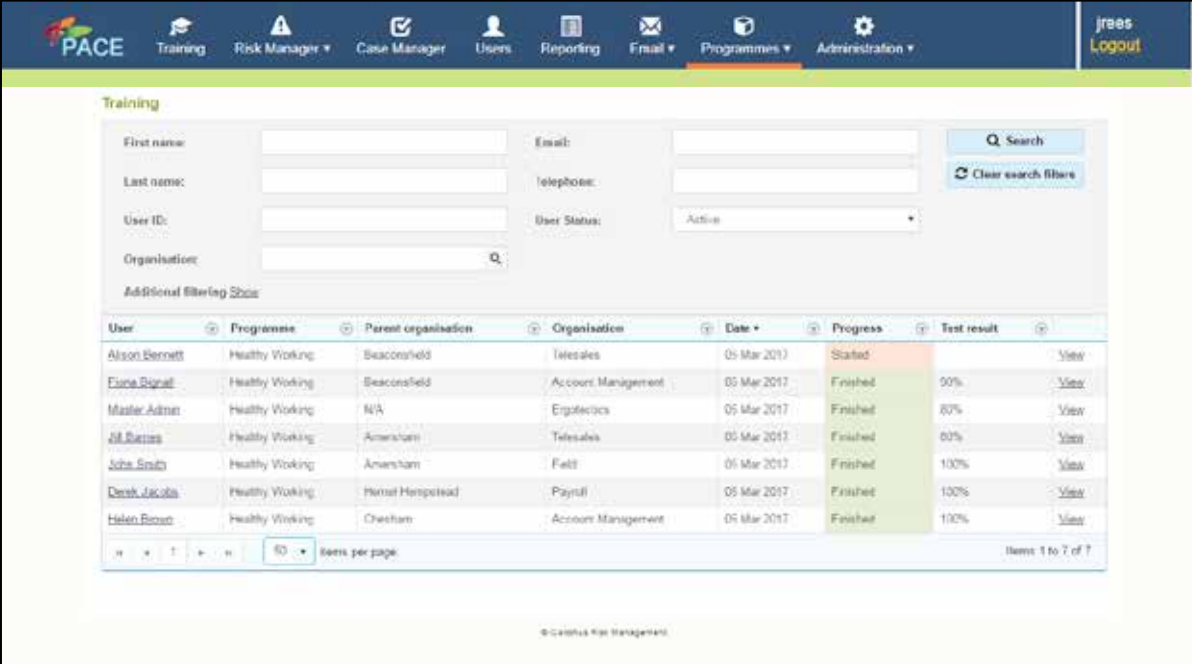
Users can be assigned multiple roles e.g. a Course User and Assessor – in this case they will end up with a wide range of rights as they only need each right to exist in one of their many roles for them to be able to exercise it. It is also possible to define additional roles and allocate those to relevant users.

Roles and rights are managed through the **Administration** module of PACE. The **Roles and rights** menus sit under the **MANAGE ADMINISTRATORS** menu. You may not have sufficient rights to access this module but you will be able to use the roles and rights that have been created.

## 3.0 Training Menu

The **Training** section of PACE gives you visibility of your users’ progress in relation to their eLearning.

Access it by clicking on Training at the top of the screen. A training record is created as soon as a user begins their eLearning – users who have not begun their training do not have training records and therefore do not appear on this screen. Search for records using the fields at the top of the screen.



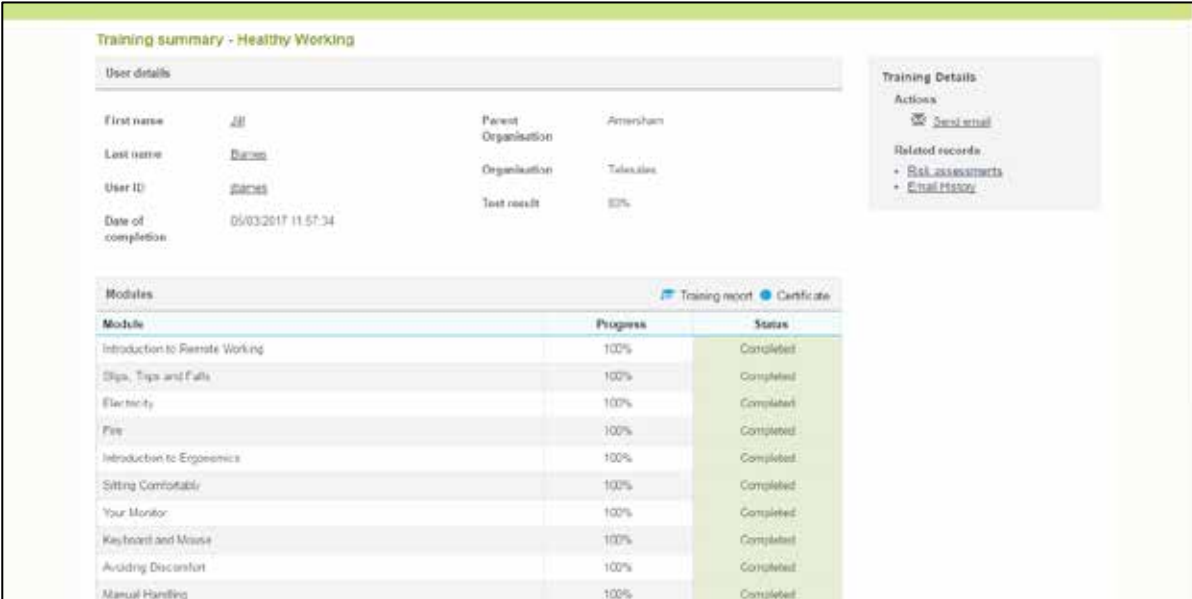
**Training**

First name:  Email:  [Q Search](#)  
 Last name:  Telephone:  [Clear search filters](#)  
 User ID:  User Status: Active   
 Organisation:  [Q](#)  
 Additional filtering: Show

User	Programme	Parent organisation	Organisation	Date	Progress	Test result	
Alison Bennett	Healthy Working	Beaconsfield	Telesales	05 Mar 2017	Started		<a href="#">View</a>
Fiona Regan	Healthy Working	Beaconsfield	Account Management	05 Mar 2017	Finished	90%	<a href="#">View</a>
Master Admin	Healthy Working	N/A	Ergonomics	05 Mar 2017	Finished	80%	<a href="#">View</a>
Al Barnes	Healthy Working	Amersham	Telesales	05 Mar 2017	Finished	80%	<a href="#">View</a>
John Smith	Healthy Working	Amersham	Field	05 Mar 2017	Finished	100%	<a href="#">View</a>
David Jacobs	Healthy Working	Hemel Hempstead	Payroll	05 Mar 2017	Finished	100%	<a href="#">View</a>
Helen Brown	Healthy Working	Chesham	Account Management	05 Mar 2017	Finished	100%	<a href="#">View</a>

Items 1 to 7 of 7

Click **[View](#)** next to a Training record to view it in more detail. The **Training summary** screen shows you the user's progress in terms of how far they have progressed on all the modules they have so far attempted.



**Training summary - Healthy Working**

**User details**

First name: **Al** Parent Organisation: **Amersham**  
 Last name: **Barnes** Organisation: **Telesales**  
 User ID: **36865** Test result: **80%**  
 Date of completion: **05/03/2017 11:57:34**

**Training Details**

Actions  
[Send email](#)

Related records  
[Risk assessments](#)  
[Email history](#)

**Modules** [Training report](#) [Certificate](#)

Module	Progress	Status
Introduction to Remote Working	100%	Completed
Slips, Trips and Falls	100%	Completed
Electricity	100%	Completed
Fire	100%	Completed
Introduction to Ergonomics	100%	Completed
Sitting Comfortably	100%	Completed
Your Monitor	100%	Completed
Keyboard and Mouse	100%	Completed
Avoiding Discomfort	100%	Completed
Manual Handling	100%	Completed

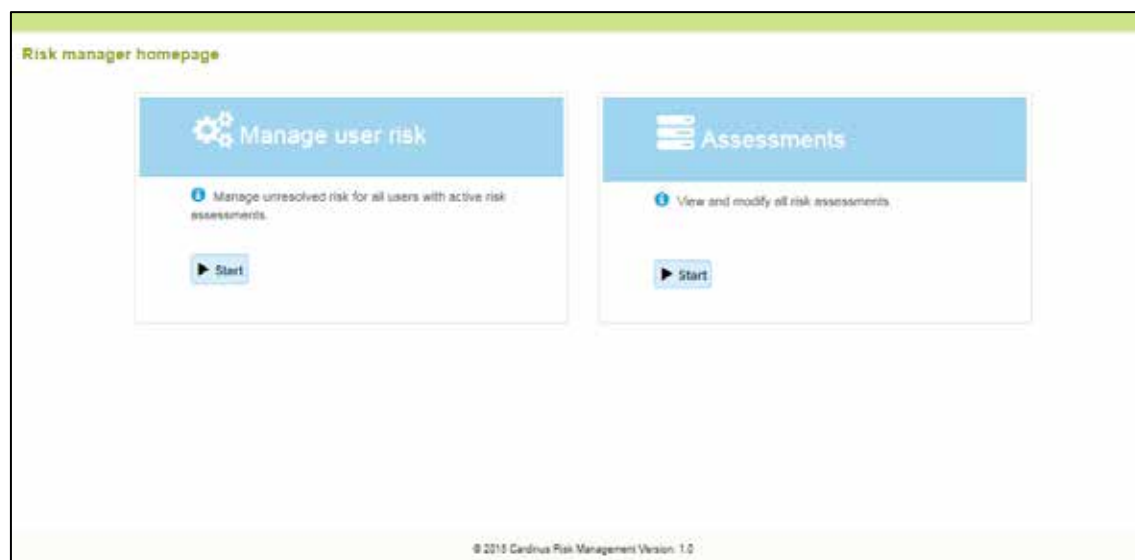
You can access the User record directly from here by clicking their **First name**, **Last name** or **User ID**. Click **Send email** to send the user an email. The **Actions** box on the right of the screen gives you access to that user's **Risk assessments** and **Email history**. You can also view the Training report and certificate from the individual training record and print these off if required.

## 4.0 Risk Manager Menu

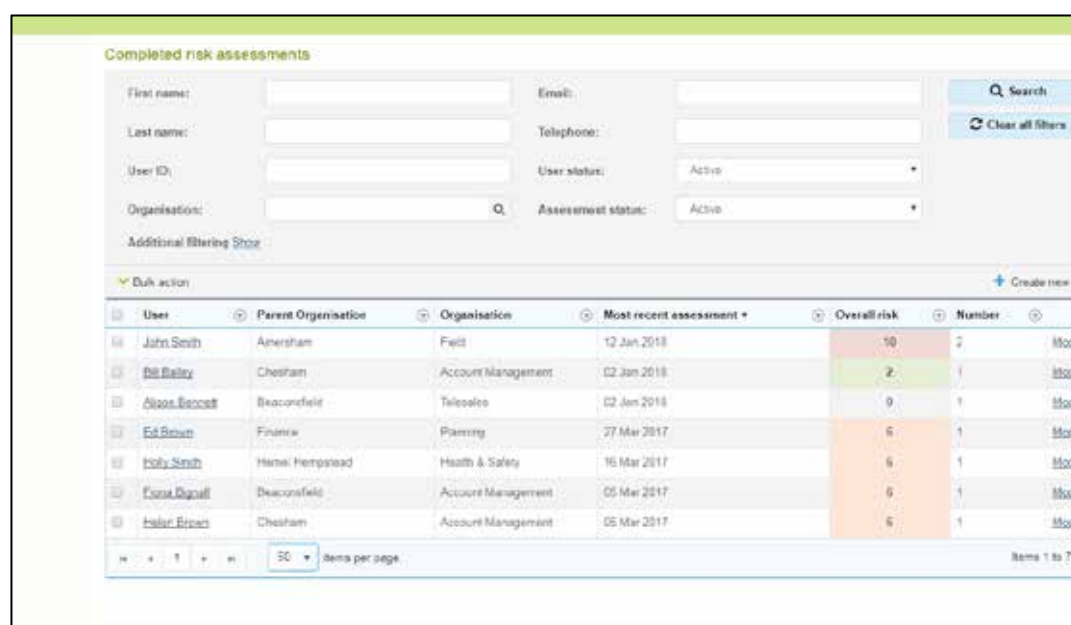
### 4.1 Viewing User Risk

Risk can be managed at either the assessment level – reviewing each assessment separately as would have been done in earlier versions of PACE, or at the user level. This second approach allows

you to take a broader view, pulling all Assessments for that user into one view and interface. Either way, you start with the **Risk Manager** icon in the PACE menu bar.



Click **Start** for your desired approach – **Manage User Risk** or **Assessments**. It is recommended that you start with **Manage user risk** as this is considerably more efficient and effective than working with **Assessments**. If however you need to manage risk assessments and their progression you should start by clicking **Assessments**. This is covered in detail in Section 4.2.



**Manage user risk** takes you to the **Active risk assessments** screen. This will list users with active risk assessments with the **Most recent assessment** at the top. If you cannot see the user(s) whose

risk you want to manage, use **First name**, **Last name**, and **User ID**. You can also limit your search to specific **Organisations**.

Please note that under the Number header it lists the number of risk assessments that this person has active. The **Healthy Working Profile** also counts as one assessment but will always have a risk level of 0 as it is purely for information. The actual risk assessment is listed under the header **Healthy Working**.

In addition to the search fields, you can apply filters to the columns in your list of users. Each column has an icon on the right-hand side that gives you access to filter criteria. The exact options you have depend on the kind of data the column is displaying. In the example opposite, a date field (**Most recent assessment**) is being filtered.

You can apply multiple filters against multiple columns to drill right down to precisely the data that you want. On a simpler level, clicking the column heading causes the list to be sorted on that column. Click the heading again and the reverse order will be applied.

The screenshot shows a table with the following columns: User, Parent Organisation, Organisation, Most recent assessment, Overall risk, and Number. A filter is applied to the 'Most recent assessment' column, showing a dropdown menu with options: 'Show items with value that:', 'is greater than', 'is equal to', and 'is less than'. The 'is greater than' option is selected, and the value '12 Jan 2018' is entered. The table displays 7 items, with the first item being John Smith, Amersham, Field, 12 Jan 2018, 10, 2.

User	Parent Organisation	Organisation	Most recent assessment	Overall risk	Number
John Smith	Amersham	Field	12 Jan 2018	10	2
Mike Bailey	Chesham	Account Management	02 Jan 2018	2	0
Aaron Corbett	Beaconsfield	Fireworks	02 Jan 2018	0	0
Ed Brown	Finance	Planning	27 Mar 2017	6	0
Holly Smith	Hemel Hempstead	Health & Safety	16 Mar 2017	6	0
Paul Bignall	Beaconsfield	Account Management	06 Mar 2017	6	0
Helan Brown	Chesham	Account Management	06 Mar 2017	6	0

The screenshot shows the 'Completed risk assessments' search and filter interface. It includes search fields for First name, Last name, User ID, Organisation, Email, Telephone, User status, and Assessment status. There are buttons for 'Search', 'Clear all filters', and 'Bulk action'. Below the search fields is a table with the same columns as the previous screenshot, showing 1 item: John Smith, Amersham, Field, 12 Jan 2018, 10, 2.

User	Parent Organisation	Organisation	Most recent assessment	Overall risk	Number
John Smith	Amersham	Field	12 Jan 2018	10	2

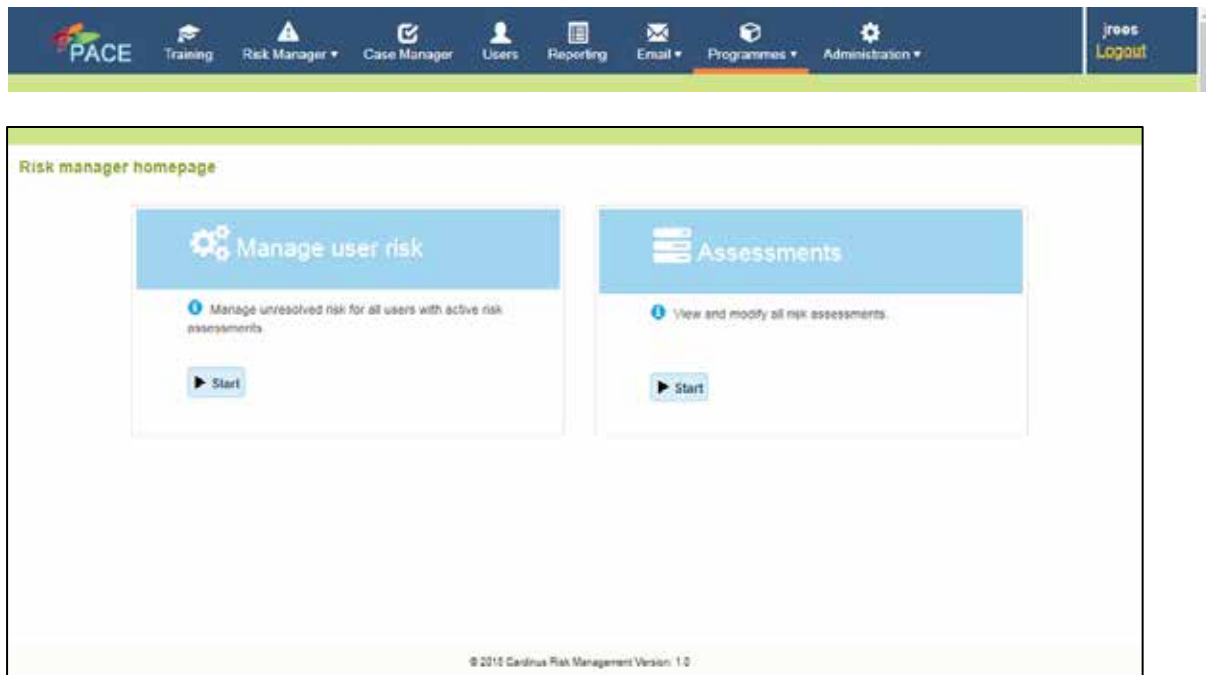
After searching and/or filtering you will have the users that you are interested in displayed on screen. In addition to their names and Organisation we see:

- The date of their **Most recent assessment**

- Their **Overall risk**
- The **Number** of active risk assessments they have

Click **Modify** to view the user's risk in more detail. (See section 4.3 for more details on managing the risk assessment.)

## 4.2 Viewing Individual Risk Assessments



As mentioned in section 4.1 if you wish to check on the progress of risk assessments that have been allocated a progression status it will be easier to click Start on the **Assessments** link. This will bring up a list of assessments sorted by latest date completed.

In this list is a risk assessment with current risk 10 and it may be that a Telephonic (TI) intervention is required if the user has health or other issues.

To set this status click in the check box to the left of the record you want and select the drop down menu for progression status. In this case John Smith's record has been selected.

**All risk assessments**

First name:  Email:  [Search](#)

Last name:  Telephone:  [Clear all filters](#)

User ID:  User status: Active

Organisation:  [Q](#) Assessment status: Active

Assessment type: All

[Additional filtering](#) [Size](#)

**Bulk action** **Change Progression Status** [+ Create new](#)

<input type="checkbox"/>	User	TI Required	Parent Organisation	Organisation	Date	Progress	Risk	Progression Status
<input checked="" type="checkbox"/>	John Smith	OT Assessment	Amersham	Field	12 Jan 2018	Finished	10	
<input type="checkbox"/>	Gordon Smith	Ergonomic Desk Assessment	Amersham	Telesales	05 May 2017	Started	0	
<input type="checkbox"/>	Helen Brown	Ergonomic Desk Assessment	Chesham	Account Management	27 Mar 2017	Started	0	
<input type="checkbox"/>	Bill Haley	Healthy Working	Chesham	Account Management	02 Jan 2018	Finished	2	
<input type="checkbox"/>	Alison Bennett	Healthy Working	Beaconsfield	Telesales	02 Jan 2018	Finished	0	
<input type="checkbox"/>	Elena Bignall	Healthy Working	Beaconsfield	Account Management	05 Mar 2017	Finished	6	
<input type="checkbox"/>	John Smith	Healthy Working	Amersham	Field	05 Mar 2017	Finished	1	

Items per page: 50 Items 1 to 7

By selecting TI Required as the status and returning to the previous screen this can be identified in the list.

**All risk assessments**

First name:  Email:  [Search](#)

Last name:  Telephone:  [Clear all filters](#)

User ID:  User status: Active

Organisation:  [Q](#) Assessment status: Active

Assessment type: All

[Additional filtering](#) [Size](#)

**Bulk action** [+ Create new](#)

<input type="checkbox"/>	User	Assessment name	Parent Organisation	Organisation	Date	Progress	Risk	Progression Status
<input type="checkbox"/>	John Smith	Healthy Working	Amersham	Field	12 Jan 2018	Finished	10	
<input type="checkbox"/>	Gordon Smith	Ergonomic Desk Assessment	Amersham	Telesales	05 May 2017	Started	0	
<input type="checkbox"/>	Helen Brown	Ergonomic Desk Assessment	Chesham	Account Management	27 Mar 2017	Started	0	
<input type="checkbox"/>	Bill Haley	Healthy Working	Chesham	Account Management	02 Jan 2018	Finished	2	
<input type="checkbox"/>	Alison Bennett	Healthy Working	Beaconsfield	Telesales	02 Jan 2018	Finished	0	
<input type="checkbox"/>	Elena Bignall	Healthy Working	Beaconsfield	Account Management	05 Mar 2017	Finished	6	
<input type="checkbox"/>	John Smith	Healthy Working	Amersham	Field	05 Mar 2017	Finished	1	

Items per page: 50 Items 1 to 7

It can then be searched for using the filter on progression status.

**All risk assessments**

First name:  Email:

Last name:  Telephone:

User ID:  User status:

Organisation:  Assessment status:

Assessment type:

[Additional filtering tools](#)

User	Assessment name	Parent Organisation	Organisation	Date	Progress	Risk	Progression Status
John Smith	Healthy Working	Amersham	Field	12 Jan 2016	Finished	10	T1 Required
Gordon Smith	Ergonomic Desk Assessment	Amersham	Telesales	05 May 2017	Started	0	
Helen Brown	Ergonomic Desk Assessment	Chesham	Account Management	27 Mar 2017	Started	0	
Bill Bailey	Healthy Working	Chesham	Account Management	02 Jan 2018	Finished	2	
Alison Bennett	Healthy Working	Beaconsfield	Telesales	02 Jan 2018	Finished	0	
Fiona Signal	Healthy Working	Beaconsfield	Account Management	05 Mar 2017	Finished	6	
John Smith	Healthy Working	Amersham	Field	05 Mar 2017	Finished	1	

Items 1 to 7

This filters only the record(s) with that status and makes it easy to track records that need attention.

User	Assessment name	Parent Organisation	Organisation	Date	Progress	Risk	Progression Status
John Smith	Healthy Working	Amersham	Field	12 Jan 2016	Finished	10	T1 Required
Gordon Smith	Ergonomic Desk Assessment	Amersham	Telesales	05 May 2017	Started	0	
Helen Brown	Ergonomic Desk Assessment	Chesham	Account Management	27 Mar 2017	Started	0	
Bill Bailey	Healthy Working	Chesham	Account Management	02 Jan 2018	Finished	2	
Alison Bennett	Healthy Working	Beaconsfield	Telesales	02 Jan 2018	Finished	0	
Fiona Signal	Healthy Working	Beaconsfield	Account Management	05 Mar 2017	Finished	6	
John Smith	Healthy Working	Amersham	Field	05 Mar 2017	Finished	1	

Items 1 to 7 of 7

Show items with value that:

Is equal to

And

Is equal to

**All risk assessments**

First name:  Email:

Last name:  Telephone:

User ID:  User status:

Organisation:  Assessment status:

Assessment type:

[Additional filtering tools](#)

User	Assessment name	Parent Organisation	Organisation	Date	Progress	Risk	Progression Status
John Smith	Healthy Working	Amersham	Field	12 Jan 2016	Finished	10	T1 Required

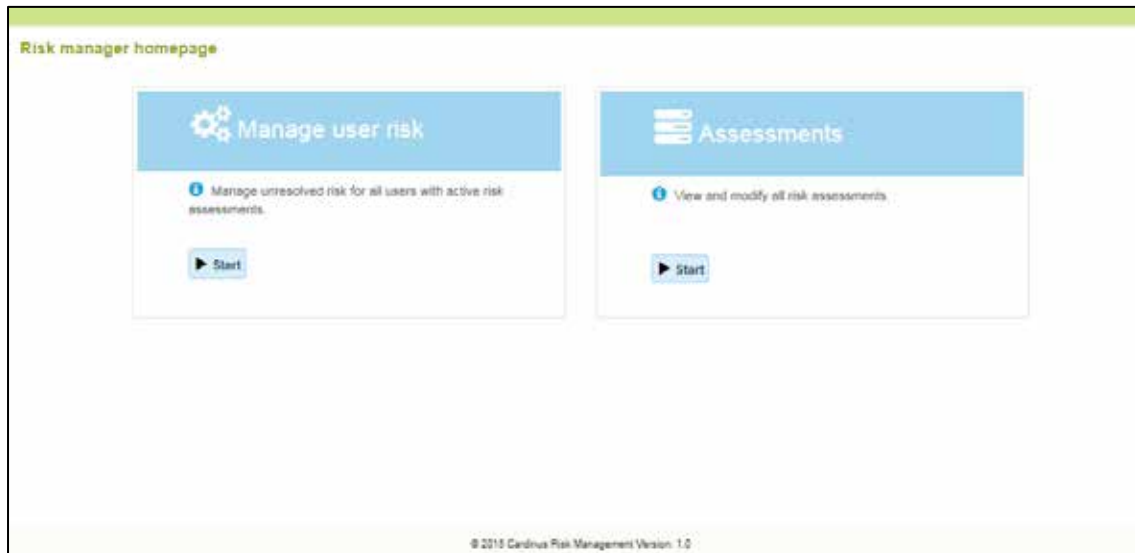
Items 1 to 7

© Cardinus Risk Management



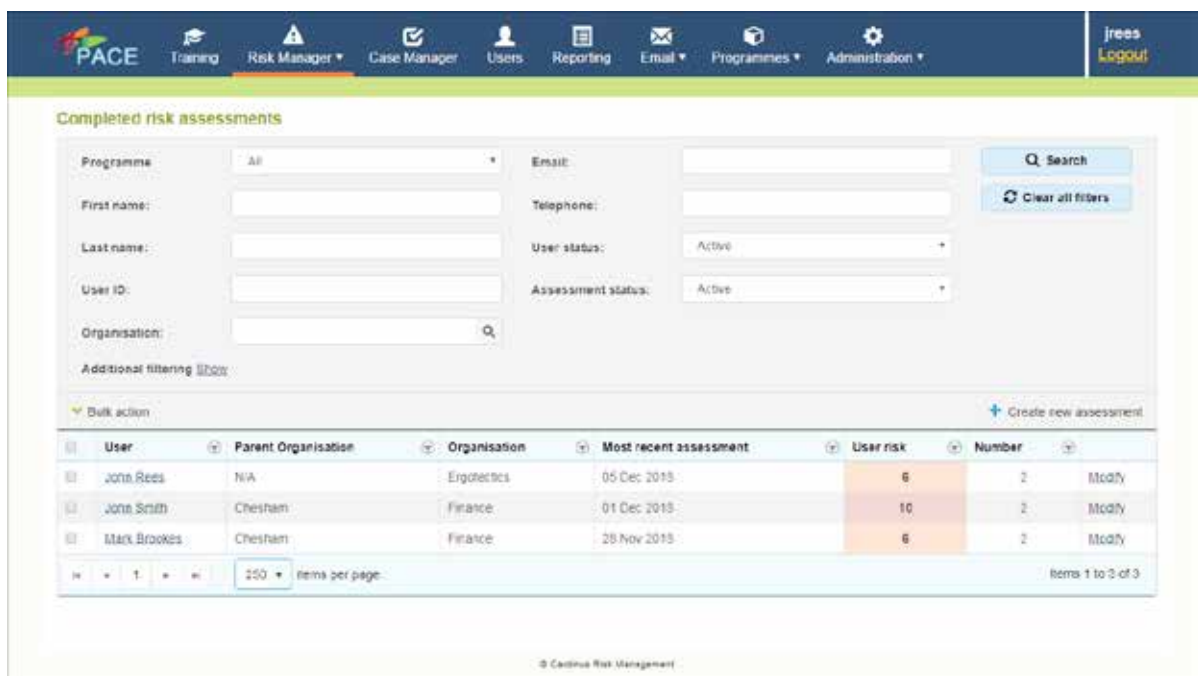
## 4.3 Managing User Risk

As shown in Section 4.1 to enter the User risk screen click on the **Risk Manager** menu and then on **Manage** user risk.



### 4.3.1 View the Risk Assessment Detail

You will then see a list of users and you can click on **Modify** to the right of the user to view the risk assessment in more detail. In this case John Smith has been selected.



Clicking on Modify next to the record will show John Smith's risk profile.

The screenshot shows the PACE Healthy Working interface. At the top is a navigation bar with tabs: PACE, Training, Risk Manager (selected), Case Manager, Users, Reporting, Email, Programmes, and Administration. Below the navigation bar, the user's details are displayed: Organisation (Finance), Email (john.smith@ergolectics.co.uk), and Telephone. A dropdown menu for 'Additional user details' is visible. The main section is titled 'Assessment 1 of 2' and shows a progress bar. Below this, the assessment details are listed: Status (ACTIVE), Assessment date (01 Dec 2018), Next assessment date, Organisation at time of assessment (Finance), and Parent organisation at time of assessment (Cheslham). To the right, there are links for 'View assessment report', 'View assessment recommendations report', and 'Email report(s)'. At the bottom, there are two summary boxes: '0 unresolvable item(s)' and '21 unresolved item(s)'.

The default view for user risk is to show any unresolved items along with those that have been resolved and anything that is deemed to be 'unresolvable', '21 unresolved items are shown'. Whilst it is possible to view risk assessments in their entirety from this screen – see below – the default view is limited to those areas that need attention.

The top section of the screen holds basic user details. Click **Name** or **User ID** to access their User Record.

This screenshot shows the 'User details' section. It includes fields for Name (John Smith), User ID (j.smith), Organisation (Finance), and Email (john.smith@ergolectics.co.uk). To the right, there is a red box indicating 'Non-compliant' with a risk score of 10. Below this, there is a list of actions: Email John, John's attachments, John's notes, and John's assessments.

Clicking the **Email** address opens the standard **Send an email** screen, with the selected user already in place as a recipient. **Email user** opens the standard **Send an email** page.

**Attachments** allows you to view any documents or photographs that have been attached to the User record

**User Notes** opens the notes section from the User record.

**User assessments** opens a list of active assessments for that user.

This screenshot shows a red box with the text 'Non-compliant' and 'John's risk score is 10'. To the right is a white exclamation mark icon. Below this, there is a list of actions: Email John, John's attachments, John's notes, and John's assessments.

On the right-hand side of the screen a box displays the current compliance status of the user, along with their current overall risk score. This will be the highest score for all assessments listed. If the user has unresolved risks that have not been marked as Unresolvable, then this box will state that the user is currently non-compliant and display on a red background. Where there is no resolvable risk to be marked as resolved, the user will be considered compliant and will display on a green background.

This screenshot shows a green box with the text 'Compliant' and 'This user's score is 0'. To the right is a white checkmark icon.

Below the compliance status and risk score, there are links for common actions that you might want to take with regard to the user's risks:

User	Parent Organisation	Organisation	Most recent assessment	Overall risk	Number	
<a href="#">John Smith</a>	Amersham	Field	25 Mar 2017	10	2	Modify

If the user has more than one active risk assessment, you can switch between them with the controls at the top of the risk section (see screenshot below). Clicking the arrows switches between assessments, but you can also click the central circles to change from one to another.

The assessment title is displayed as a link (see “Healthy Working completed on 02 Sep 2018” in the image above) – clicking that link gives you access to the entire risk assessment.

On this screen you will also have the ability to **Create a new Assessment** (Covered under section 4.6) or add **Notes** or **Attachments** to the risk assessment or to view a **Task list**.

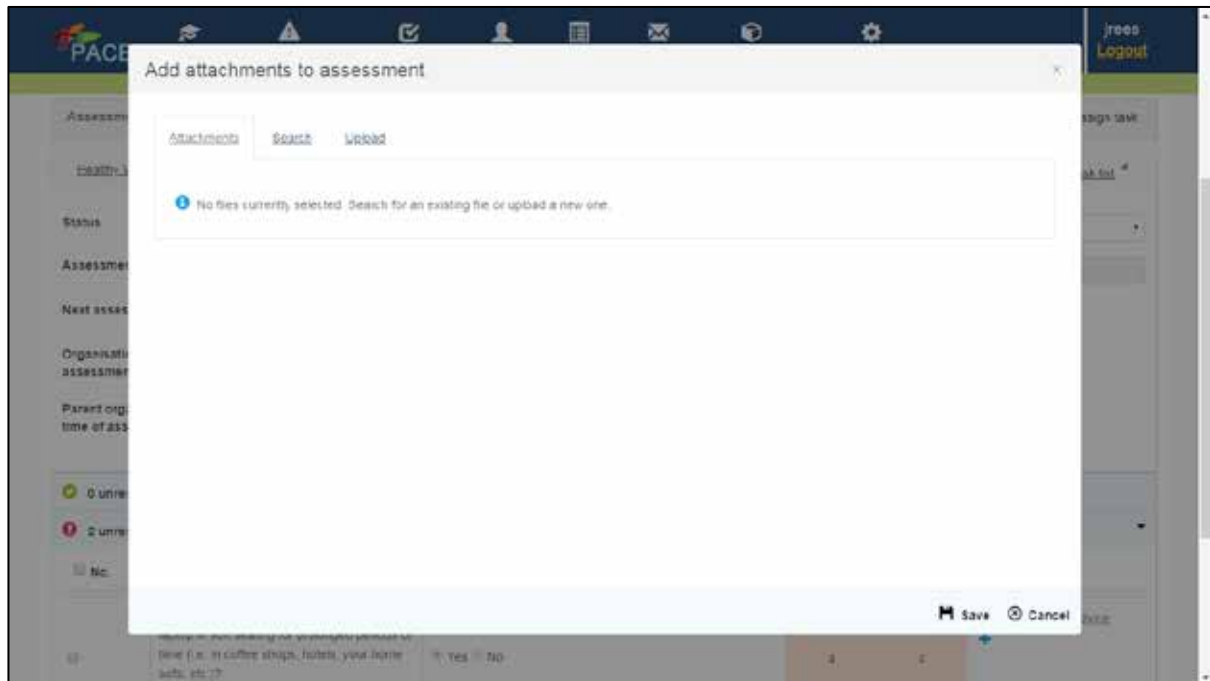
#### 4.3.2 Adding notes to the Risk Assessment

On clicking on the **Notes** menu at the top right a note can be added and saved and is indicated in brackets after the Notes heading.

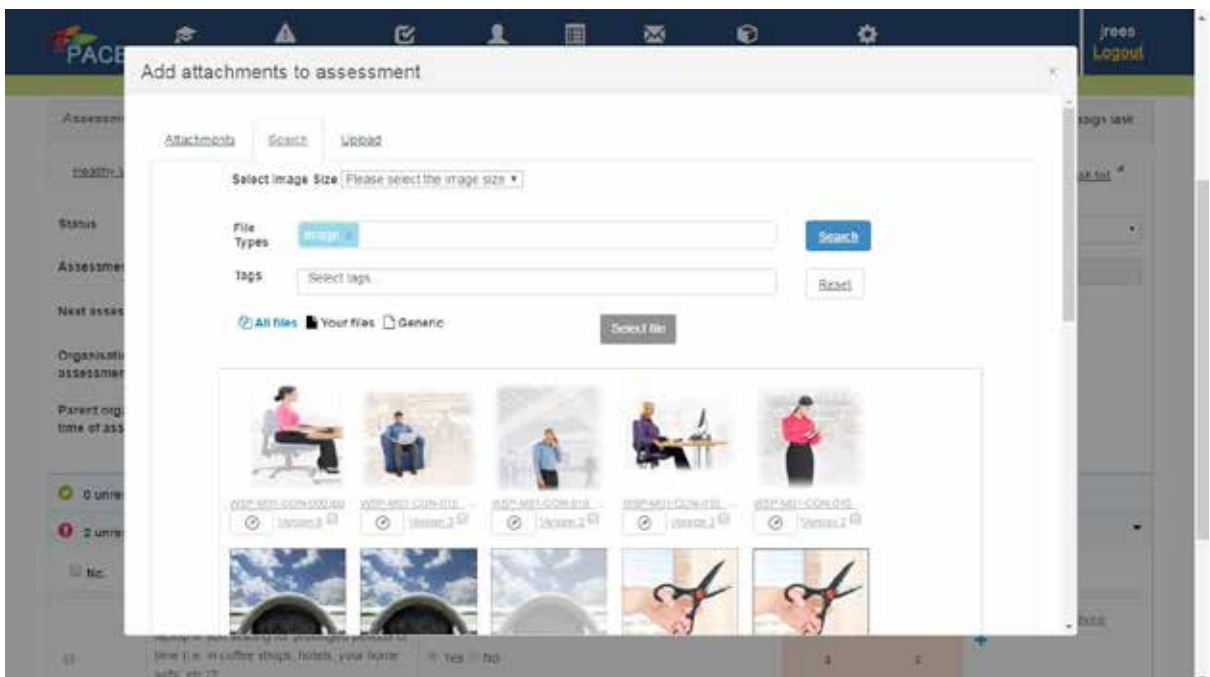
#### 4.3.3 Adding attachments to the Risk Assessment

Attachments such as documents or reports can be added to the risk assessment by clicking on the attachments header.

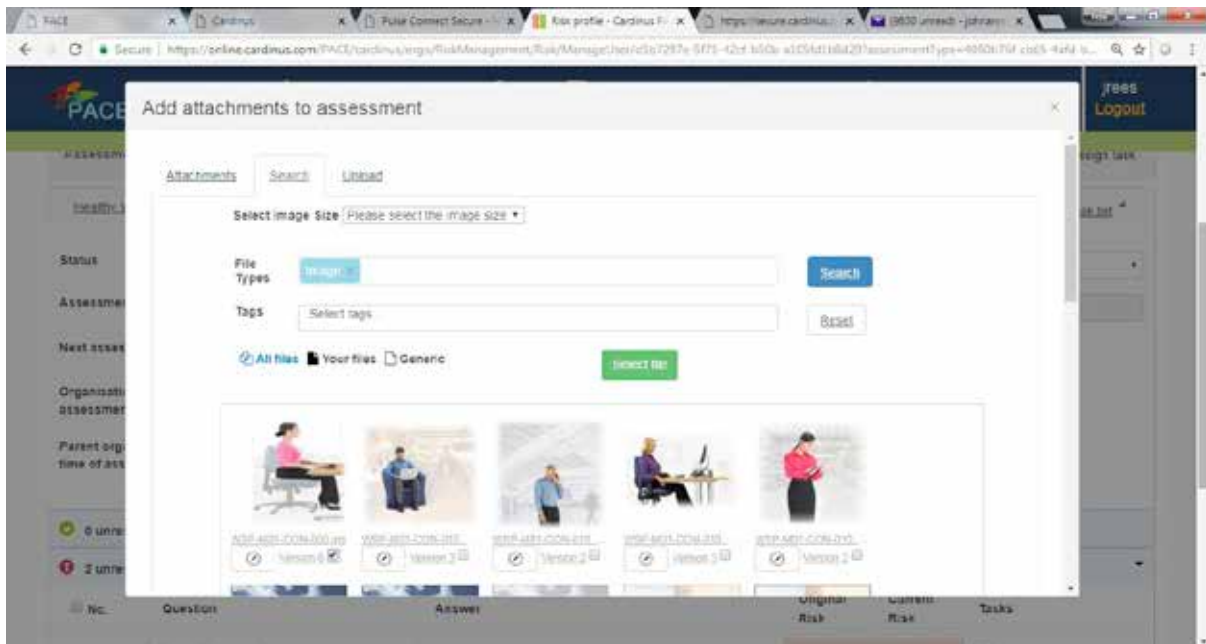
Attachments can be added from an existing bank of images by clicking on Search or from another file source by clicking on Upload.



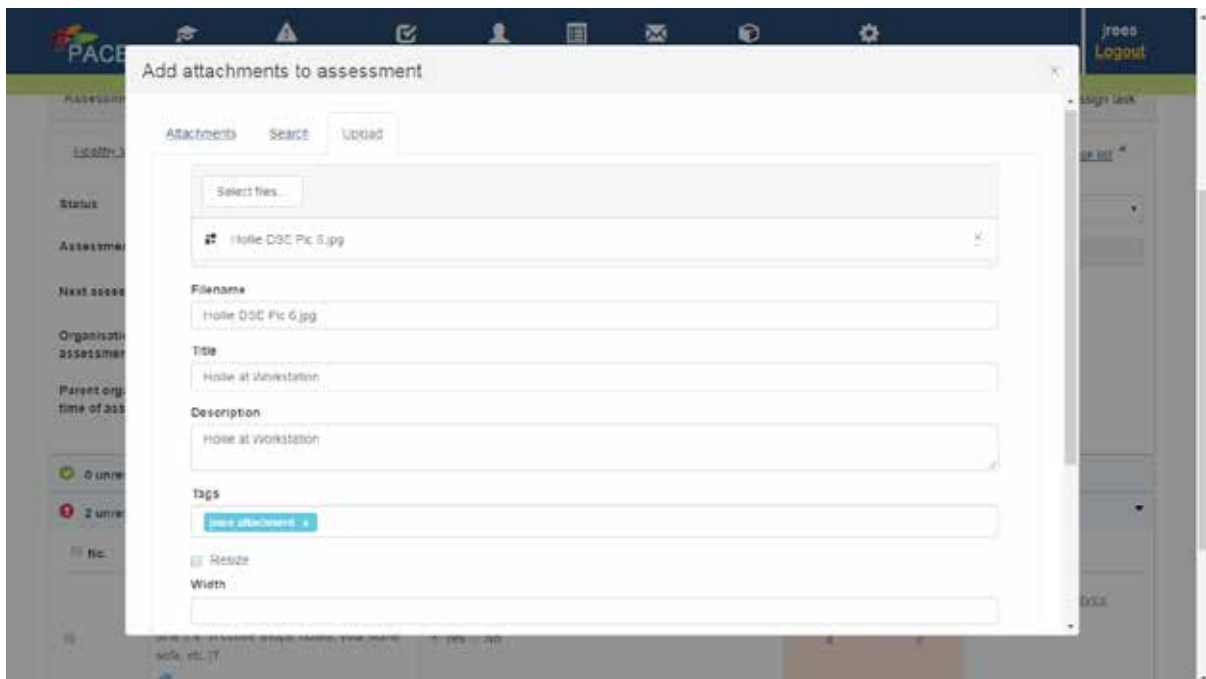
In the first case a Search will yield any images that are in the image bank.



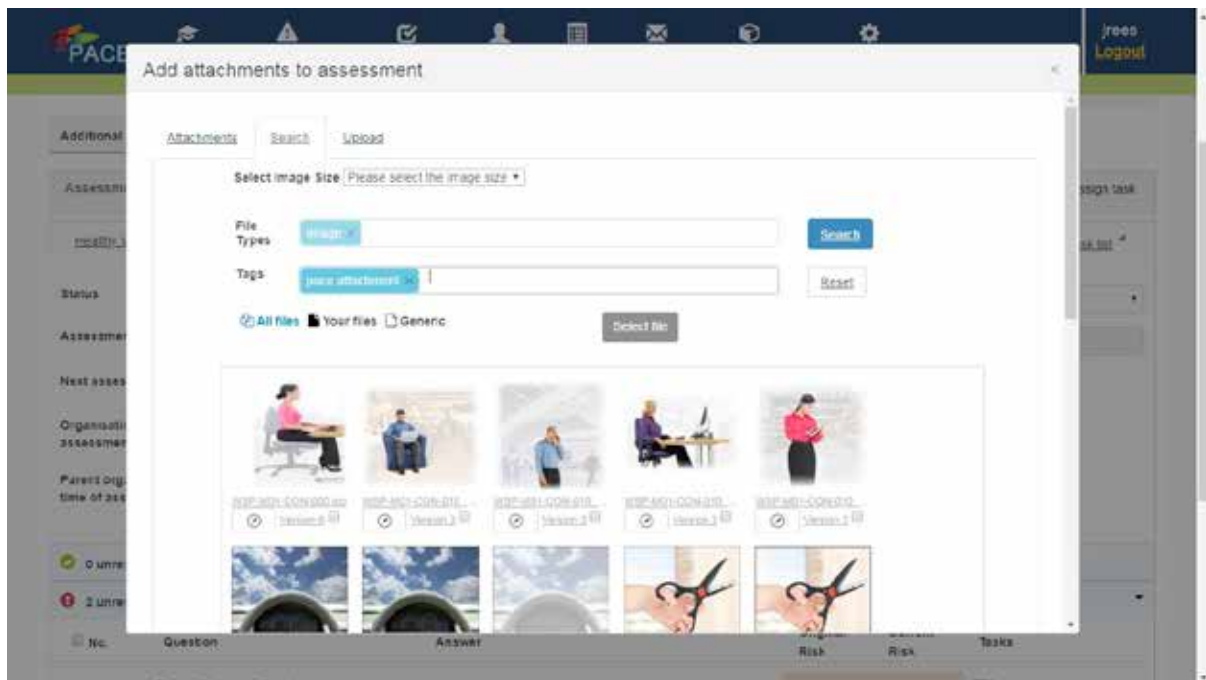
Checking the box against an image that is required to be uploaded and then clicking on Select will upload that image to the assessment.



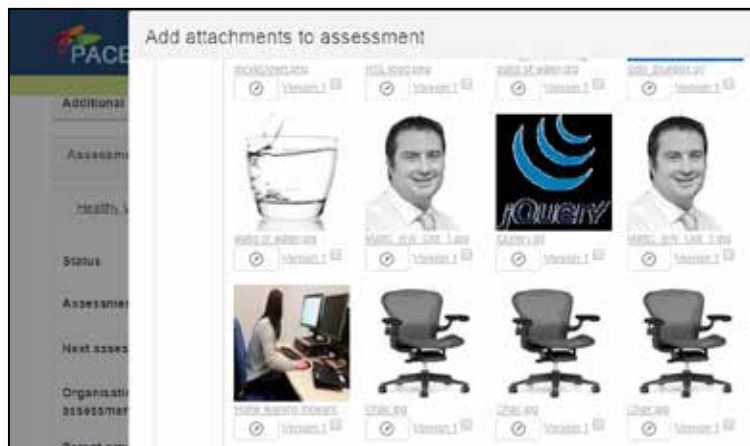
Alternatively a file can be uploaded by clicking on Upload and searching the relevant folder.



Once files have been uploaded they can be identified by a Tag. The default tag is PACE Attachment. Tags can be used to identify which attachments have been uploaded.



If the **PACE attachment tag** is used then it filters the files that have been uploaded for use as attachments.



These files can then be selected and uploaded as attachments. Remember to click on **Save** after Upload to ensure that file is uploaded correctly.

#### 4.3.4 Risk Classification

Risk is split into three sections, to access these click on the drill down icon on the left hand side of the screen, adjacent to the type of risk:

##### Unresolvable risk

These are risks which have not been resolved despite all reasonable attempts to mitigate them. The risk continues to count towards the user's overall risk score. It is different from Unresolved risk in that no further actions are expected or required.

##### Unresolved risk

Risks which have not been resolved and further action can still be taken. Risk management focuses on unresolved risk and what can be done to mitigate them.



## Resolved risk

Risks marked as “resolved” have a Current Risk of 0. The risk no longer exists.

Risks are classified also as **High** (7-10), **Medium** (4-6) and **Low** (1-3). Zero risk is represented by grey.

## 4.4 Task Management with User Risk

### 4.4.1 Assigning a Task to a single risk

We start by selecting the user risk profile and then the risk assessment that we want to examine if there is more than one. In the example below we are going to select John Smith.

The screenshot shows the 'Completed risk assessments' section in the PACE Risk Manager. It includes a search filter with fields for Programme, First name, Last name, User ID, Organisation, Email, Telephone, User status, and Assessment status. Below the filters is a table of results:

User	Parent Organisation	Organisation	Most recent assessment	User risk	Number	
<a href="#">John Rees</a>	Nik	Engleberts	03 Dec 2018	8	2	<a href="#">Modify</a>
<a href="#">John Smith</a>	Chesham	Finance	01 Dec 2018	10	2	<a href="#">Modify</a>
<a href="#">Mark Brinkley</a>	Chesham	Finance	28 Nov 2018	8	2	<a href="#">Modify</a>

At the bottom, it shows '250 items per page' and 'Items 1 to 3 of 3'.

We can see that John Smith has a number of unresolved issues.

The screenshot shows the details of a risk assessment for John Smith. It includes a header with 'Healthy Working - Healthy Working consideration 01 Dec 2018' and a 'Create new assessment' button. The main section contains fields for status (ACTIVE, ARCHIVED), assessment date (01 Dec 2018), next assessment date, organisation at time of assessment (Finance), and parent organisation at time of assessment (Chesham). Below these fields is a section for 'Unresolvable item(s)' and 'Unresolved item(s)'. The 'Unresolved item(s)' section shows a table of questions and answers:

No.	Question	Answer	Original Risk	Current Risk	Tasks
10	Do you experience any discomfort in your lower back and what is its frequency?	<input checked="" type="radio"/> Daily <input type="radio"/> Weekly <input type="radio"/> Monthly <input type="radio"/> Never	10	10	<a href="#">Set up a task correctly</a>
11	Do you experience any discomfort in your legs or feet and what is its frequency?	<input checked="" type="radio"/> Daily <input type="radio"/> Weekly <input type="radio"/> Monthly <input type="radio"/> Never	10	10	<a href="#">Set up a task correctly</a>



Risk is managed through the assignment and completion of Tasks. The simplest way to assign a Task to a risk is to click the **+** in the **Tasks** column for the risk. This opens the **Assign task** screen. In the case below we have clicked against Q18 regarding neck pain.

The screenshot shows the CARDINUS Risk Management interface. At the top, there are two tabs: '8 unresolved item(s)' (active) and '19 resolved item(s)'. Below the tabs is a table with columns: No., Question, Answer, Original Risk, Current Risk, and Tasks. The table lists four risks (Q18, Q21, Q22, Q23) related to discomfort in the neck, lower back, legs/feet, and hands/wrists/forearms/elbows. Each risk has an 'Original Risk' of 10 and a 'Current Risk' of 10. The 'Tasks' column for each risk shows a list of tasks with a '+' icon to assign a task. The bottom of the screen shows '8 resolved item(s)' and a copyright notice '© Cardinus Risk Management'.

In the **Assign task** screen start by choosing your **Template** – these are pre-defined Tasks with clear, plain language names. Select the template whose description most closely matches the action you have taken (or are going to take) in response to the risk.

The screenshot shows the 'Assign task' screen. It has a header 'Assign task' and a sub-header 'Define task details below'. There are two tabs: 'Click here to create a new task template' (active) and 'Click here to create a new task template'. The main form has fields for 'Template \*' (set to 'Advise given to remedy issue'), 'Cost' (set to '£0.00'), 'Details' (a text area with the placeholder 'Please edit to show the action that was taken.'), 'Allocated administrator \*' (set to 'Shirley Adams'), and 'Required by \*' (set to '12/01/2018'). On the right, there is a table with columns 'Remove', 'Question details', and 'Risk'. The table lists one task: 'Healthy Working' with a risk of '10.00'. The task details are '10. Please define where you experience your discomfort and its frequency in your neck, shoulders or upper back.' and 'Daily'. At the bottom, there are buttons for 'Cancel', 'Save and close', and 'Next'.

If you wish, you can provide a **Cost** for the task – this is reportable information that can be used to track the costs incurred mitigating risks.

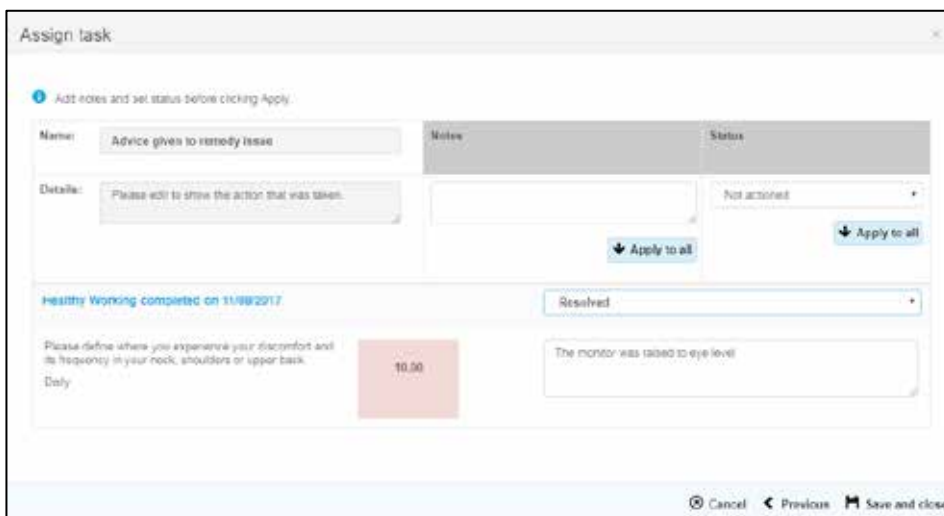
Some tasks have associated **Details** that automatically populate when you select the appropriate template. You can edit the **Details** box manually and should make sure that it accurately represents the action you have taken or are intending to take in relation to this risk.

**Allocate administrator** is used to nominate the PACE Administrator who is responsible for the task. This is not necessarily the person who will physically complete the actions required – it is the person responsible for ensuring that it is properly recorded in PACE. The Administrator chosen here will see the task in their **Case Manager** and will receive notifications on their home page if the task is not completed by the **Required by** date.

You must now provide a date:

**Required by date.** This is for tasks that are not yet complete, or the effects of which are not yet known. The **Required by** date acts as both deadline and reminder that further attention is required. If the task has already been completed then enter the date that it was completed.

Click **Next** to complete the process of assigning your task.



You have the option here of providing extra **Notes**. In the case of a single risk you can put the notes in the box to the right of the risk. In the case of multiple issues you can use the box above and select **Apply to all**. What you will certainly want to do is select an appropriate **Status** (see list below).

Possible task statuses:

**Not actioned**

*The default status. Nothing has yet been done.*

**Actioned**

*Action has been taken, but the effect is not yet known. It is assumed that the task will be updated later.*

**Improved**

*Records that the task has improved the situation but it has not completely eliminated the risk. The risk score can be modified to lower the risk to a more appropriate level.*

**Resolved**

*The action described in the task has eliminated the risk. The Current Risk score drops to 0.*

**Does not resolve**

*The action described in the task had no effect on the risk.*

Once you have added the status click **Save and close**

No.	Question	Answer	Original Risk	Current Risk	Tasks
29	Please select the picture that best represents your preferred posture throughout the day.	<input checked="" type="radio"/> Laying forwards <input type="radio"/> Sitting upright <input type="radio"/> Laying backwards	3	3	+
54	Does your keyboard work properly, without the keys sticking?	<input type="radio"/> Yes <input checked="" type="radio"/> No	3	3	<input checked="" type="checkbox"/> Keyboard dust and oil... +
61	When you are working do you find yourself holding the mouse when you are not using it?	<input checked="" type="radio"/> Yes <input type="radio"/> No	3	3	<input checked="" type="checkbox"/> Long term mouse use +
63	Do you know how to adjust your screen's brightness and contrast to achieve viewing comfort?	<input type="radio"/> Yes <input checked="" type="radio"/> No	2	2	<input checked="" type="checkbox"/> Monitor contrast an... +

1 resolved item(s)					
No.	Question	Answer	Original Risk	Current Risk	Tasks
18	Please define where you experience your discomfort and its frequency in your neck, shoulders or upper back.	<input checked="" type="radio"/> Early <input type="radio"/> Weekly <input type="radio"/> Monthly <input type="radio"/> Never	10	0	<input checked="" type="checkbox"/> Advice given to user... <input checked="" type="checkbox"/> Using heliothema cor...

You can now see your Task alongside the risk question 18, in this case it is in the 'resolved' section and it now shows the Original risk as 10 and the Current risk as 0.

#### 4.4.2 Assigning Tasks to multiple risks

PACE Training Risk Manager Case Manager Users Reporting Email Programmes Administration jrees Logout

Assessment 1 of 2 < > Mark as unresolvable **Assign task**

Healthy Working - Healthy Working completed on 01 Dec 2015 + Create new assessment Notes Attachments Task list

Status: **ACTIVE** ARCHIVED Progression status:   
 Assessment date: 01 Dec 2015 Assessment type: Self  
 Next assessment date:   
 Organisation at time of assessment: Finance Assessment report(s):  
 Parent organisation at time of assessment: Chesham View assessment report  
 View assessment recommendations report  
 Email report(s)

0 unresolvable item(s)  
 19 unresolved item(s)

No.	Question	Answer	Original Risk	Current Risk	Tasks
18	Do you experience any discomfort in your lower back and what is its frequency?	<input checked="" type="radio"/> Daily <input type="radio"/> Weekly <input type="radio"/> Monthly <input type="radio"/> Never	10	10	<input checked="" type="checkbox"/> Set up chair correctly + <input checked="" type="checkbox"/> Set up chair correctly

You can assign the same task to multiple risks using the check boxes beside the risk number. Select all the risks to which the task applies and click **Assign task** in the header bar (circled in red).

The **assign task** screen is similar to the one we saw when assigning tasks to a single risk – the only difference is the list of questions on the right-hand side. You can click the trash can icon in the **Remove** column if you want to take any risks out of the list.

**Assign task**

Define task details below

Click here to create a new task template

Template \*

Cost

Details

Allocated administrator \*

Required by \*

The task will be applied to all questions below. Remove where required before clicking Next.

Remove	Question details	Risk
	Healthy Working 21. Do you experience any discomfort in your lower back and what is its frequency? Daily	10.00
	Healthy Working 22. Do you experience any discomfort in your legs or feet and what is its frequency? Daily	10.00
	Healthy Working 23. Do you experience any discomfort in your hands, wrists, forearms or elbows and what is its frequency? Daily	10.00

Cancel Save and close Next

Complete the relevant fields as described above for single risk tasks and click **Next**

**Assign task**

Details: Please provide a description of the advice given and confirm the employee's commitment to follow the advice

Next actioned

Apply to all

Healthy Working completed on 01/12/2018

Do you experience any discomfort in your lower back and what is its frequency?  
Daily

10.00

Healthy Working completed on 01/12/2018

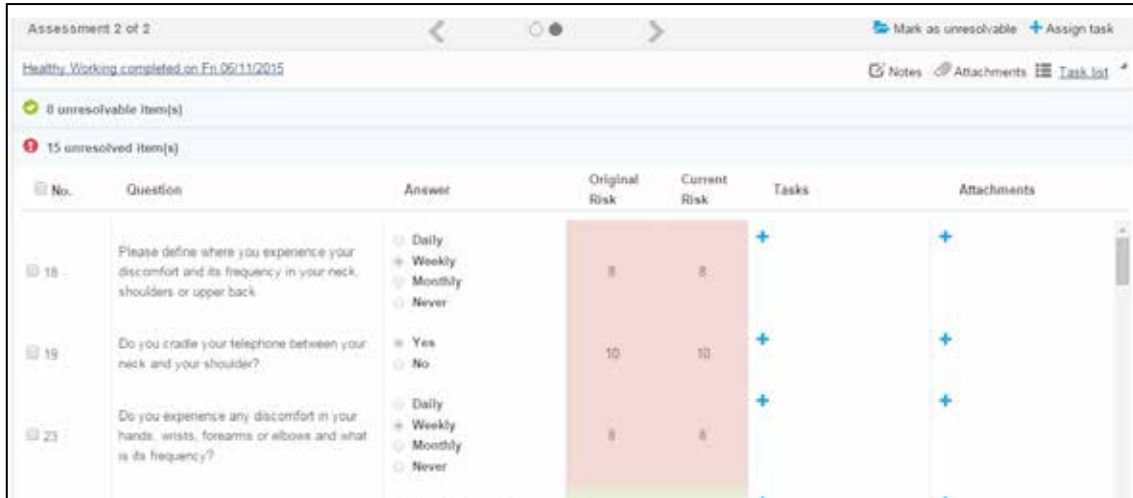
Do you experience any discomfort in your legs or feet and what is its frequency?  
Daily

10.00

Apply to all

The second screen is for applying notes and setting statuses. Use the top section if you want to apply the same notes and status to all selected risks. Use the bottom section, where the risks are listed individually, if you want to apply different notes or statuses to different risks.

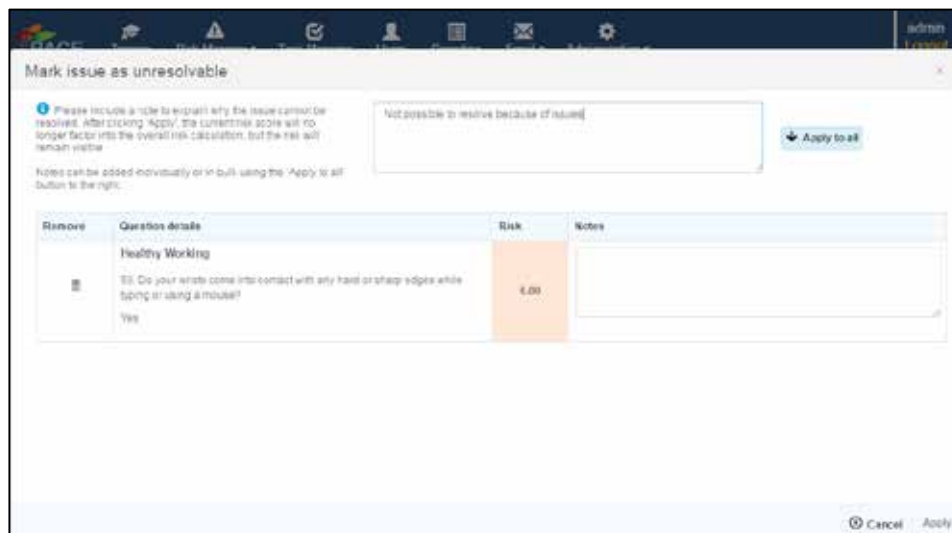
#### 4.4.3 Unresolvable Risk



No.	Question	Answer	Original Risk	Current Risk	Tasks	Attachments
18	Please define where you experience your discomfort and its frequency in your neck, shoulders or upper back.	<input type="radio"/> Daily <input checked="" type="radio"/> Weekly <input type="radio"/> Monthly <input type="radio"/> Never	8	8	+	+
19	Do you cradle your telephone between your neck and your shoulder?	<input checked="" type="radio"/> Yes <input type="radio"/> No	10	10	+	+
23	Do you experience any discomfort in your hands, wrists, forearms or elbows and what is its frequency?	<input type="radio"/> Daily <input checked="" type="radio"/> Weekly <input type="radio"/> Monthly <input type="radio"/> Never	8	8	+	+

Risks can be marked as Unresolvable using the check boxes beside their question number. Select all the relevant risks and click **Mark as unresolvable** in the header bar.

**NOTE** - It is expected that an unresolvable risk will have at least one task already assigned to it and completed by the user in their Healthy Working Plan to say it was not possible to resolve it. – i.e. that there will be evidence that effort was made to resolve the risk before it was written off as unresolvable. The setting of the unresolvable status means that the user will not get reminders to complete actions even though there remains a risk.



**Mark issue as unresolvable**

Please include a note to explain why the issue cannot be resolved. After clicking 'Apply', the current risk score will no longer factor into the overall risk calculation, but the risk will remain visible.

Notes can be added individually or in bulk using the 'Apply to all' button to the right.

Not possible to resolve because of nature

Apply to all

Remove	Question details	Risk	Notes
	<b>Healthy Working</b> 18. Do your wrists come into contact with any hard or sharp edges while typing or using a mouse? Yes	6.00	

Cancel Apply

When you click **Mark as unresolvable** you are confronted with the dialogue box pictured above.

You must provide an explanation for why you consider the risk unresolvable.

If you are marking multiple risks at the same time you can choose whether to apply the same notes to all risks or provide each risk with a separate note.

Click **Apply** to mark the risk(s) as unresolvable.

No.	Question	Answer	Original Risk	Current Risk	Tasks
21	Is your ability to work affected by glare on your screen? <a href="#">Unresolvable - Just not possible...</a>	<input checked="" type="radio"/> Yes <input type="radio"/> No	0	0	<a href="#">Characteristics report...</a> <a href="#">Keyboard assessment</a>
22	Do your wrists come into contact with any hard or sharp edges while typing or using a mouse? <a href="#">Unresolvable - Just not possible...</a>	<input checked="" type="radio"/> Yes <input type="radio"/> No	0	0	<a href="#">Characteristics report...</a> <a href="#">Keyboard assessment</a>

Underneath each unresolvable risk is a link which displays the notes created when the risk was set as unresolvable. Clicking that link allows you to edit those notes and it also enables you to change a risk from **Unresolvable** back to **Unresolved**.

## 4.5 Reporting in Risk Assessment

Within each risk assessment there is the ability to run a report and email that report. The reports are accessed from the Risk profile screen as shown below.

Next assessment date	Assessment report(s)
<input type="text"/>	<a href="#">View assessment report</a> <a href="#">View assessment recommendations report</a> <a href="#">Email report(s)</a>
0 unresolvable item(s)	
18 unresolved item(s)	
1 resolved item(s)	

There are two reports that can be run:

The **Assessment report** shows original and current risk for each question in the risk assessment.

The **Assessment recommendations report** also includes the notes that have been added in the Assign task section and can be used as the basis of a working document or completed assessment that can be emailed to the user or their manager.

Healthy Working Risk Assessment Recommendations		CARDINUS riskmanagement	
<b>User Details</b>			
Name	John Smith		
User ID	jsmith		
Parent organisation	Amersham		
Organisation	Felt		
<b>Assessment Details</b>			
Assessment date	12 January 2018		
<b>Profile Questions</b>			
Question	Answer	Original risk	Current risk
How many hours per day do you use your computer?	More than 1 hour a day	0	0
What type of environment do you work in?	Office (including home office)	0	0
What type of computer do you mainly use for work?	I mainly use a desktop computer	0	0
Do you work from a home office?	No	0	0
Are you pregnant?	No	0	0
Do you use a sit / stand workstation?	No	0	0
Do you use dual or multiple monitors?	No	0	0
Do you use keyboard tray?	No	0	0
Do you use a mouse with a wrist rest?	No	0	0

Healthy Working Risk Assessment Recommendations

Question	Answer	Original risk	Current risk
Please define when you experience your discomfort and its frequency in your neck, shoulders or upper back.	Daily	10	0
Task name: Advice given to remedy issue Details: Please edit to show the action that was taken. Notes: The monitor was raised to eye level Status: Resolved Required by: 12 Jan 2018 Completed on: 12 Jan 2018 Allocated admin: Master Admin			
Task name: Using telephone correctly Details: Instruct user to consider a headset or speakerphone Notes: Status: Not actioned Required by: Completed on: Allocated admin:			
Do you cradle your telephone between your neck and your shoulder?	Yes	8	8
Do you look at your keyboard while you type?	No	0	0
Do you experience any discomfort in your lower back and what is its frequency?	Daily	10	10
Task name: Set up chair correctly Details: Instruct user to set up their chair correctly Notes: Status: Not actioned Required by: Completed on: Allocated admin:			

By clicking on Email report a list of available reports appears.

Status: **ACTIVE** / ARCHIVED  
 Assessment date: 05 Mar 2017  
 Next assessment date:  
 Progression status:  
 Assessment type: Self  
 Assessment report(s):  
[View assessment report](#)  
[View assessment recommendation report](#)  
[Email report\(s\)](#)

Email report(s)

Below are all available assessment reports for this user. Please select the report(s) you wish to email

Assessment	Assessment Date	Report	
Healthy Working	05 Mar 2017	Assessment report	Select
Healthy Working	05 Mar 2017	Assessment recommendation report	Select
Healthy Working	05 Mar 2017	Assessment report	Select
Healthy Working	05 Mar 2017	Assessment recommendation report	Select
Healthy Working	11 Aug 2017	Assessment report	Select
Healthy Working	11 Aug 2017	Assessment recommendation report	Select

1 - 6 of 6 items

Selection

Assessment recommendation report for Healthy Working on 05 Mar 2017 x

Cancel OK

Selecting the report then attaches it to an email and it can then be sent using a suitable email template.



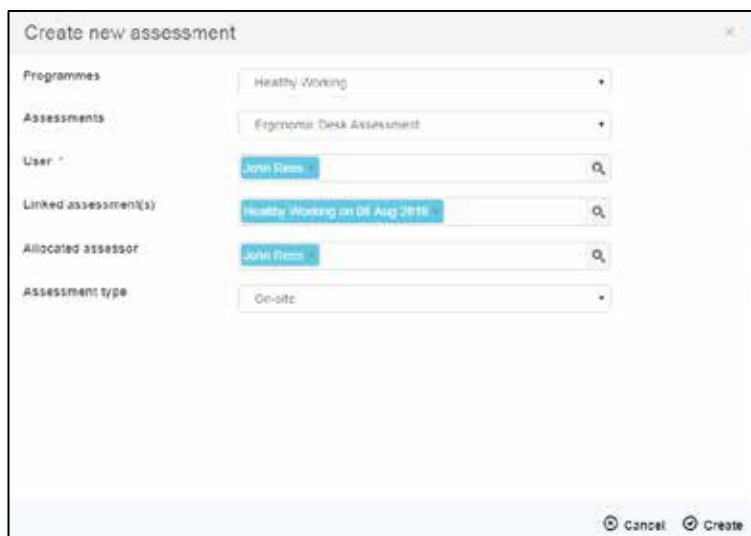
## 4.6 Ergonomic Desk Assessment

An ergonomic desk assessment (EDA) is an assessment that can be carried out by a competent assessor at someone's workstation. It has no automatic features such as in the self risk assessment created by the user so risk levels are set by the person who creates and manages the EDA. This implies that the person creating it must have a good understanding of ergonomic principles and how they apply to a user's workstation. The EDA once created is attached to the user's record.

An EDA is created from the **Risk Manager** menu by clicking on **Manage user risk** and then **Create new assessment** as indicated by the red arrow.

User	Parent Organisation	Organisation	Most recent assessment	User risk	Number	Modify
cardinus_test_user	East Grinstead	Safety & Ergonomics	02 Sep 2018	4	2	Modify

Clicking on **Create new assessment** will open a form to specify for whom the assessment has been created and which assessment it is linked to.

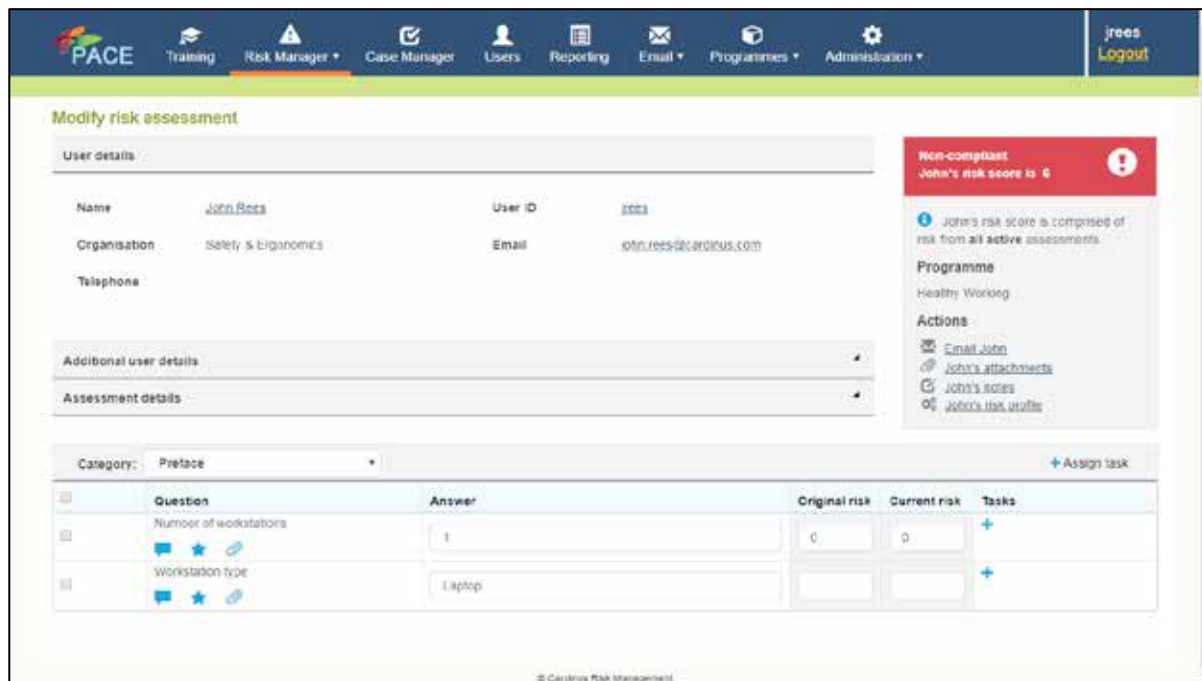


Once the basic details have been completed the EDA can be created.

As can be seen it has a number of sections, each of which allow you to enter free text descriptions and to set original and current risk level. The original risk level could be derived from the self risk assessment if appropriate.

The sections are as follows with a blank form and an example of how each might be filled in.

**Preface** – Basic details of the number and type of workstations



Category:	Question	Answer	Original risk	Current risk	Tasks
Preface	Number of workstations	1	0	0	+
	Workstation type	Laptop			+

In this case it is a laptop that is being used without additional equipment such as a separate mouse keyboard and monitor.

Q	Question	Answer	Original risk	Current risk	Tasks
Q.1	Number of workstations	1	0	0	+
Q.2	Workstation type	Laptop used on the user without separation equipment	0	0	+

**User Details** – Background to why the assessment is needed and an overall assessment of their posture.

Q	Question	Answer	Original risk	Current risk	Tasks
Q.3	Background	Why was the assessment needed? Give details about the user and any past experiences or any other information helpful in establishing the user's background.	0	0	+
Q.4	User's posture		0	0	+

Q	Question	Answer	Original risk	Current risk	Tasks
Q.3	Background	Why was the assessment needed? Give details about the user and any past experiences or any other information helpful in establishing the user's background. This user has been experiencing a persistent pain in the neck when using the laptop for long periods.	0	0	+
Q.4	User's posture	The user was observed to look down at the laptop screen with neck bent when using it normally for work.	0	0	+

**Workstation** – a detailed analysis of the workstation set-up.

Q	Question	Answer	Original risk	Current risk	Tasks
Q.5	Workstation description		0	0	+
Q.6	Desk type		0	0	+
Q.7	Desk height (inches)		0	0	+
Q.8	Desk width (inches)		0	0	+

The various elements of the workstation are examined and notes are written about these. Original and current risk levels can be set so that it provides a working document.

Q	Question	Answer	Original risk	Current risk	Tasks
Q.5	Workstation description	Q1 laptop with 30" screen and touch pad mouse	0	0	+
Q.6	Desk type	The user has desk with three adjustable height levels used to accommodate a range of users	0	0	+
Q.7	Desk height (inches)	Variable height can be changed so that the user can sit with feet flat on the floor and	0	0	+
Q.8	Desk width (inches)	32" adequate for the user as a separate keyboard and mouse were used	0	0	+
Q.9	Desk depth (inches)	37" adequate for the user to keep equipment and papers well organized	0	0	+

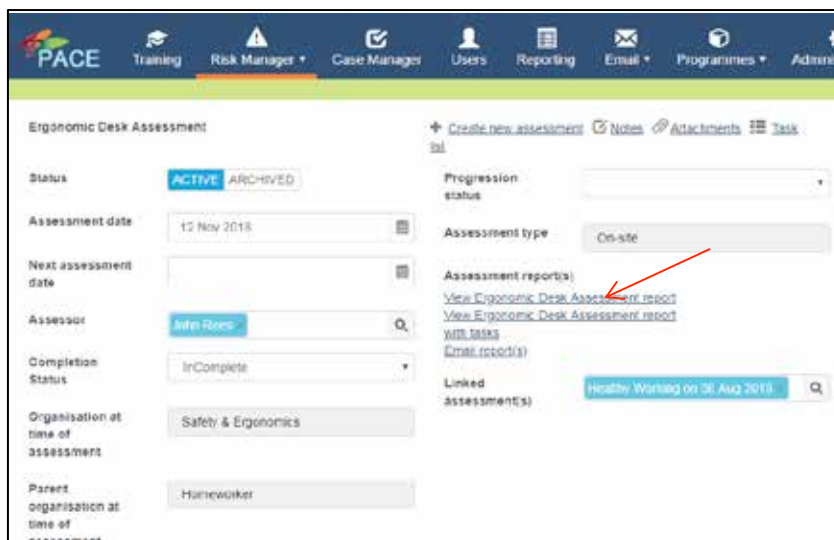
**Work routine** – the working practices of the user.

Detailed notes can be made and the appropriate risk levels set.

**Issues and recommendations** – These are conclusions and follow up actions emanating from the Assessment.

The issues identified are summarised and then actions specified. Tasks can be used to specify more detail

Reports can be run from the Assessment details section.

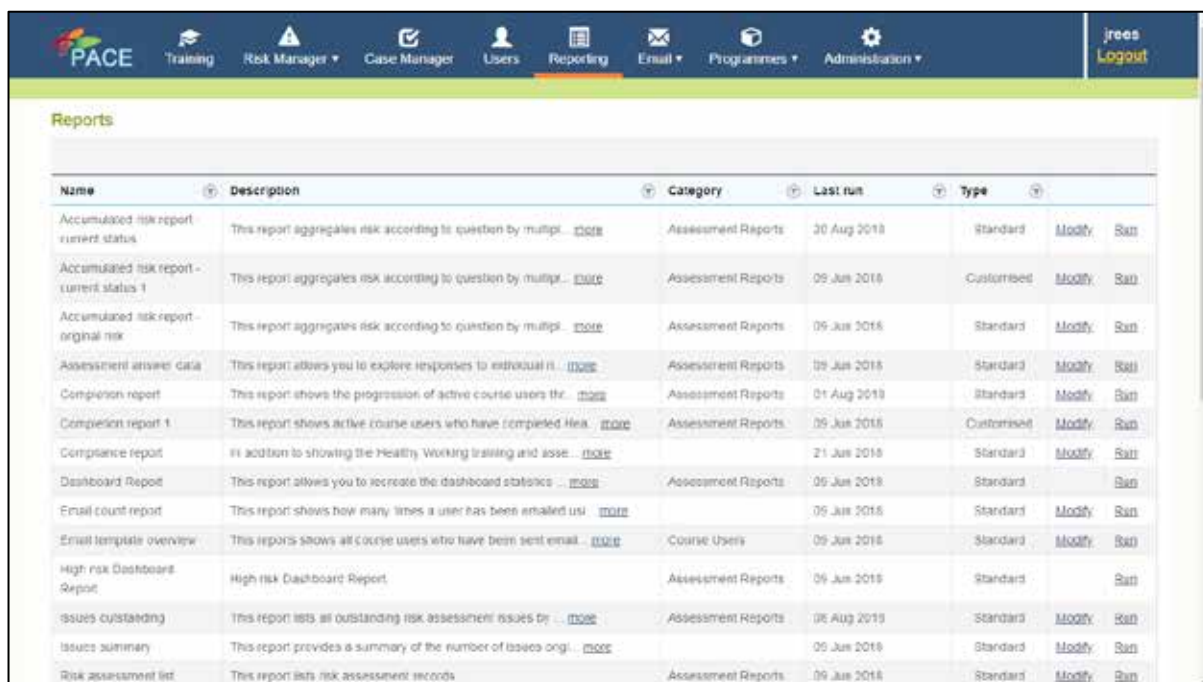


The EDA once completed will remain on the system and can be updated when necessary.

## 5.0 Reporting Menu

### 5.1 Running standard reports

Click **Reporting** in the PACE toolbar to access the standard set of reports with which PACE comes pre-loaded. All reports have plain-language names and descriptions which make their purpose clear.



Name	Description	Category	Last run	Type		
Accumulated risk report - current status	This report aggregates risk according to question by multipl... <a href="#">more</a>	Assessment Reports	30 Aug 2018	Standard	<a href="#">Modify</a>	<a href="#">Run</a>
Accumulated risk report - current status 1	This report aggregates risk according to question by multipl... <a href="#">more</a>	Assessment Reports	09 Jun 2018	Customised	<a href="#">Modify</a>	<a href="#">Run</a>
Accumulated risk report - original risk	This report aggregates risk according to question by multipl... <a href="#">more</a>	Assessment Reports	09 Jun 2018	Standard	<a href="#">Modify</a>	<a href="#">Run</a>
Assessment answer data	This report allows you to explore responses to individual n... <a href="#">more</a>	Assessment Reports	09 Jun 2018	Standard	<a href="#">Modify</a>	<a href="#">Run</a>
Completion report	This report shows the progression of active course users thr... <a href="#">more</a>	Assessment Reports	01 Aug 2018	Standard	<a href="#">Modify</a>	<a href="#">Run</a>
Completion report 1	This report shows active course users who have completed Hea... <a href="#">more</a>	Assessment Reports	09 Jun 2018	Customised	<a href="#">Modify</a>	<a href="#">Run</a>
Compliance report	In addition to showing the Healthy Working training and asse... <a href="#">more</a>		21 Jun 2018	Standard	<a href="#">Modify</a>	<a href="#">Run</a>
Dashboard Report	This report allows you to recreate the dashboard statistics ... <a href="#">more</a>	Assessment Reports	09 Jun 2018	Standard		<a href="#">Run</a>
Email count report	This report shows how many times a user has been emailed usi... <a href="#">more</a>		09 Jun 2018	Standard	<a href="#">Modify</a>	<a href="#">Run</a>
Email template overview	This reports shows all course users who have been sent email... <a href="#">more</a>	Course Users	09 Jun 2018	Standard	<a href="#">Modify</a>	<a href="#">Run</a>
High risk Dashboard Report	High risk Dashboard Report	Assessment Reports	09 Jun 2018	Standard		<a href="#">Run</a>
Issues outstanding	This report lists all outstanding risk assessment issues by ... <a href="#">more</a>	Assessment Reports	06 Aug 2018	Standard	<a href="#">Modify</a>	<a href="#">Run</a>
Issues summary	This report provides a summary of the number of issues origi... <a href="#">more</a>		09 Jun 2018	Standard	<a href="#">Modify</a>	<a href="#">Run</a>
Risk assessment list	This report lists risk assessment records	Assessment Reports	09 Jun 2018	Standard	<a href="#">Modify</a>	<a href="#">Run</a>

Click **Run** to run the reports for all users to which you have access.

For example if you want to run a report that shows everyone who is active on the system and what their current status is you would choose the **Completion report**

Clicking on Run will give the following screen.

The screenshot shows the 'Run report' interface. On the left, under 'Filters', there is a search bar for 'Organisation' and a tree view for selecting entities. The tree view includes 'Ergotecica' (selected), 'Sales' (selected), 'Amersham' (selected), 'Field' (selected), 'Tele sales' (selected), 'Account Management' (selected), 'Chesham' (selected), and 'Field' (selected). Below the tree view are input fields for 'Start date' and 'End date' (set to '01 Mar 2017'). At the bottom, there is an 'Advanced criteria' section with a note: 'The report can be filtered further using advanced criteria, if desired.' and a 'Source of data' dropdown. On the right, the 'Report details' section shows the 'Name' as 'Completion report', a 'Description' stating 'This report shows active course users who have completed Healthy Working. Producing this report in Excel format is recommended due to its', an 'Update history' link, and an 'Output Format' dropdown set to 'html'. A blue 'Run' button is at the bottom right.

Details of the organisation and date range can be completed.

This screenshot is similar to the previous one but shows the 'Run report' interface with the date range completed. The 'Start date' is now '01 Mar 2017' and the 'End date' is '01 Mar 2017'. The 'Run' button is still present at the bottom right.

The output can be selected to run as a html file, a pdf file or an Excel spreadsheet.

**Run report**

Filters

Organisation:

☒ Select all ☒ Deselect all

- ☒ Ergotectics
  - ☒ Sales
    - ☒ Amersham
    - ☒ Field
    - ☒ Telesales
    - ☒ Account Management
  - ☒ Chesham
    - ☒ Field

Start date:

End date:

Advanced criteria:

The report can be filtered further using advanced criteria. If desired.

Source of data:

**Report details**

Name:

Description:

Update history:

Output Format:

In this case a date filter has been applied and it shows anyone who has completed within this date range for Ergotectics and all its departments.

Advanced criteria can also be created to filter further if required.

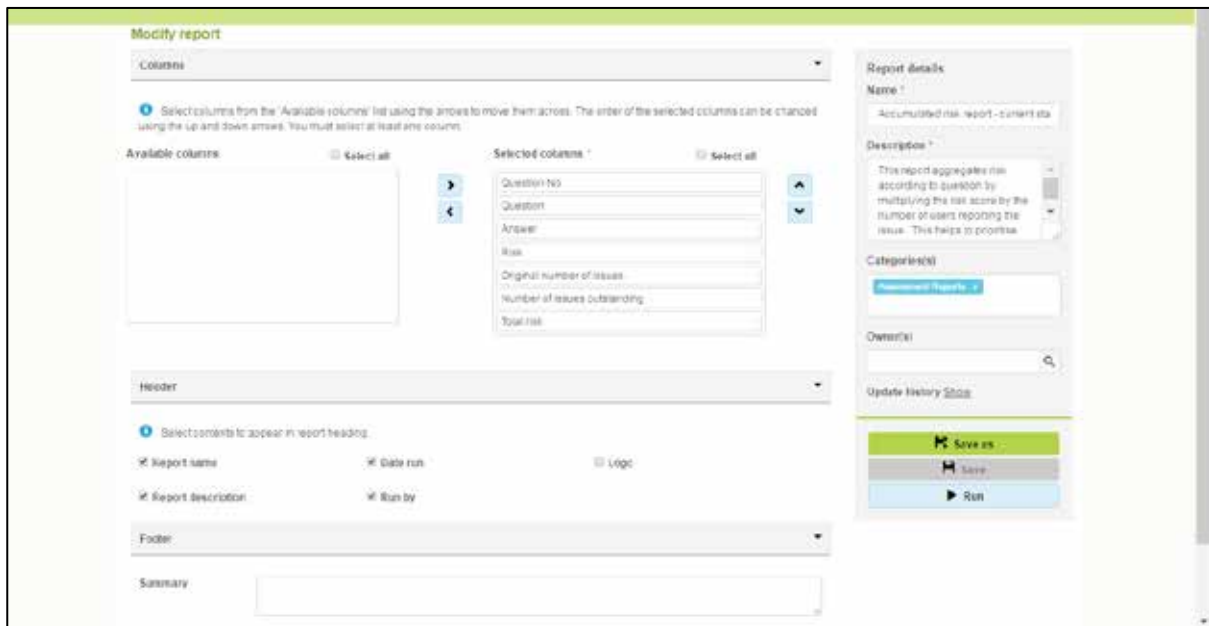
Clicking on Run will generate the report in Excel format.

	C	D	E	F	G	H	I	J	K	L	M	N
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## 5.2 Modification of reports

Alternatively to running a standard report it possible to create customised reports, click **Modify** to take more control over the report you are running. **Columns** allow you to add or remove columns of data to your report. Select a column (or columns) and use the < and > icons to switch columns between the **Available Columns** and **Selected Columns** list.





You can change the order in which the **Selected Columns** appear on your report (the highest column in the list appears on the left of the report, with the one beneath appearing to its right and so on from there). You can also remove fields from your report. **Report name and header** allows you to make changes to the title and information displayed at the top of your report. Check the boxes next to the information you wish to include.

**Report footer** allows you to add some textual context to the report in terms of **Comments** that will be displayed at the bottom.

Click **Run** to run your report with the above settings.

**Report Details** gives you access to supporting information and settings for the report:

**Name** – The default title of the report, and how it is identified in PACE

**Description** – Used to provide further information about the purpose of the report.

**Category(s)** – Category(ies) are used to group reports with others that produce related output. It is possible for a report to be classified as more than one category.

**Owners** – As elsewhere in PACE, report Owners are the Administrators in PACE who are able to modify the report.

You can **Show** or **Hide** the **Update history** to see when and by whom the report was created and last modified.

**Save as** creates a new report. **Save** updates the existing report. (N.B. If you save a modification to the existing report and don't save it as a new name this will alter the standard report.)

In the example below a new report has been created by moving columns from the standard report and saving it as a new report.

**Modify report**

Columns

Select columns from the 'Available columns' list using the arrows to move them across. The order of the selected columns can be changed using the up and down arrows. You must select at least one column.

Available columns		Selected columns
Ergonomic Desk Assessment	➤	User id
%Completed	➤	First Name
	➤	Last Name
	➤	Email Address
	➤	User added to PACE
	➤	Healthy Working
	➤	Organisation
	➤	Parent Organisation

Header

Select contents to appear in report heading:

☒ Report name ☒ Date run ☐ Logo

☒ Report description ☒ Run by

Footer

**Report details**

Name: Completion report 1

Description: This report shows active course users who have completed Healthy Working. Producing this report in Excel format is recommended due to its

Categories(s): Assessment Reports

Owner(s):

Update history [Show](#)

[Save as](#) [Save](#) [Run](#)

**Run report**

Filters

Organisation: [Search]

☒ Select all ☒ Deselect all

- ☒ Ergonomics
  - ☒ Sales
    - ☒ Arnhem
    - ☒ Fife
    - ☒ Telenor
    - ☒ Account Management
  - ☒ Chesham
    - ☒ Fife

Start date: [Date]

End date: 05 Mar 2017

Advanced criteria

The report can be filtered further using advanced criteria, if desired.

Source of data: [Dropdown]

**Report details**

Name: Completion report 1

Description: This report shows active course users who have completed Healthy Working. Producing this report in Excel format is recommended due to its

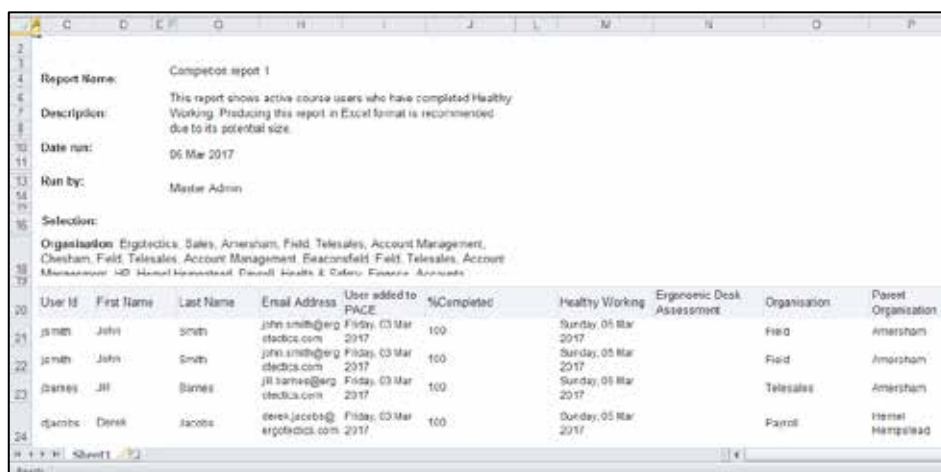
Update history [Show](#)

Output Format: html

[Run](#)

Once saved with a different name the report can then be run in the same way.

There is also a **Preview** button which allows you to preview the data before actually running the report.

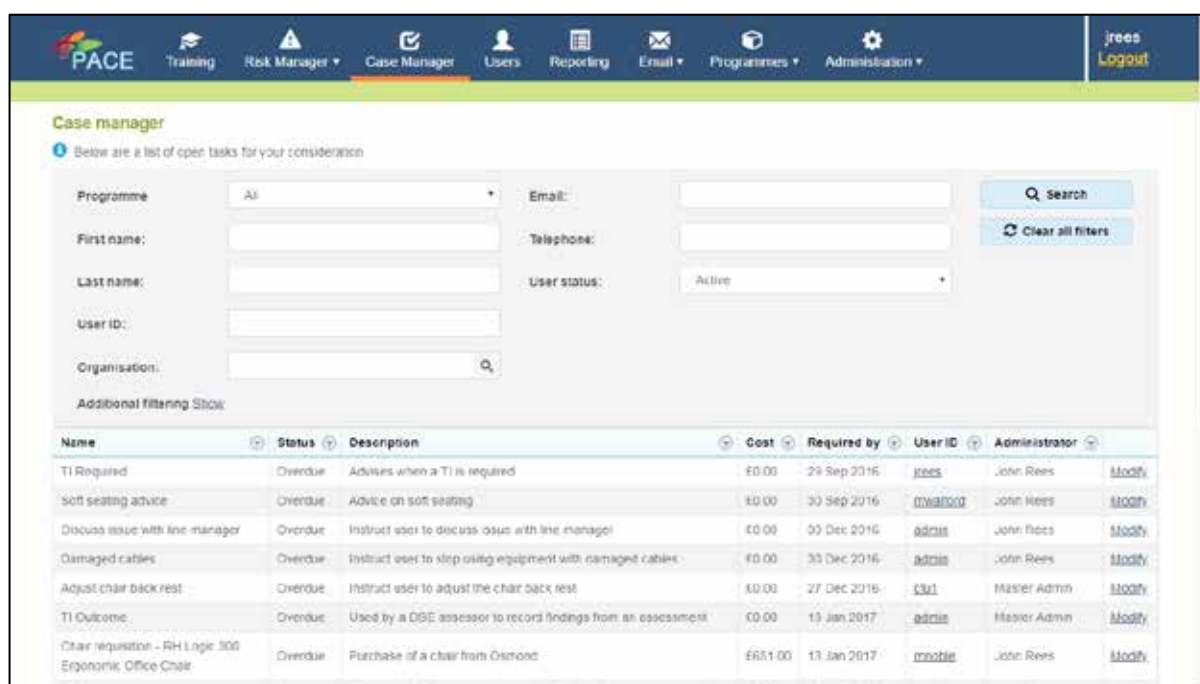


User ID	First Name	Last Name	Email Address	User added to PACE	%Completed	Healthy Working	Ergonomic Desk Assessment	Organisation	Parent Organisation
jsmith	John	Smith	john.smith@ergo	Friday, 03 Mar 2017	100	Sunday, 05 Mar 2017		Field	Amersham
jsmith	John	Smith	john.smith@ergo	Friday, 03 Mar 2017	100	Sunday, 05 Mar 2017		Field	Amersham
jbarnes	Jill	Barnes	jill.barnes@ergo	Friday, 03 Mar 2017	100	Sunday, 05 Mar 2017		Telesales	Amersham
djacobs	Derek	Jacobs	derek.jacobs@ergo	Friday, 03 Mar 2017	100	Sunday, 05 Mar 2017		Field	Hemel Hempstead

Once the report has been run the fields that were selected to modify the report are shown.

## 6.0 Case Manager Menu

The Case Manager in PACE is a menu that allows you to view any outstanding tasks that you have as an administrator related to the risk assessments you have been viewing. To access the Case Manager click on the menu on the Home screen of PACE. This will bring up a list of tasks that you own and have not completed.



**Case manager**

Below are a list of open tasks for your consideration

Programme: All | Email: | Search | Clear all filters

First name: | Telephone: |

Last name: | User status: Active |

User ID: |

Organisation: |

Additional filtering Show

Name	Status	Description	Cost	Required by	User ID	Administrator	
TI Required	Overdue	Advises when a TI is required	£0.00	24 Sep 2016	jrees	John Rees	Modify
Soft seating advice	Overdue	Advice on soft seating	£0.00	30 Sep 2016	mwafoad	John Rees	Modify
Discuss issue with line manager	Overdue	Instruct user to discuss issue with line manager	£0.00	09 Dec 2016	adms	John Rees	Modify
Damaged cables	Overdue	Instruct user to stop using equipment with damaged cables	£0.00	30 Dec 2016	adms	John Rees	Modify
Adjust chair back rest	Overdue	Instruct user to adjust the chair back rest	£0.00	27 Dec 2016	CU1	Master Admin	Modify
TI Outcome	Overdue	Used by a DSE assessor to record findings from an assessment	£0.00	13 Jan 2017	adms	Master Admin	Modify
Chair requisition - RH Logic 300 Ergonomic Office Chair	Overdue	Purchase of a chair from Osmond	£651.00	13 Jan 2017	mnoole	John Rees	Modify

By selecting **Modify** against the task that you wish to deal with it will take you to a screen called **Manage task**.

On this screen you can write notes and set the status of the task.

If you wish to reduce the risk for this task you can select the status **Resolved** and click on **Save**. This will remove the task from the list of outstanding tasks.

### Manage task

User details

Name	John Smith	User ID	jsmith
Organisation	Field	Email	john.smith@ercoelectrics.com

Additional user details

**This task has been assigned to the questions below. Indicate the appropriate resolution status once the task has been actioned.**

**Healthy Working Completed on: Sunday 05 March 2017**

Improved

Risk

0

62 Can you comfortably reach the equipment and papers you need to use regularly?

No

6.00

Task details

Name

Desk adjustment instructions

Details

Desk adjustment instructions

Note

Cost

£0.00

Required by \*

09/03/2017

Completed on

Assigned to \*

Save

### Manage task

User details

Name	John Smith	User ID	jsmith
Organisation	Field	Email	john.smith@ercoelectrics.com

Additional user details

**This task has been assigned to the questions below. Indicate the appropriate resolution status once the task has been actioned.**

**Healthy Working Completed on: Sunday 05 March 2017**

Resolved

This has now been resolved by adjusting the desk area.

62 Can you comfortably reach the equipment and papers you need to use regularly?

No

6.00

Task details

Name

Desk adjustment instructions

Details

Desk adjustment instructions

Note

This has now been resolved by adjusting the desk area.

Cost

£0.00

Required by \*

09/03/2017

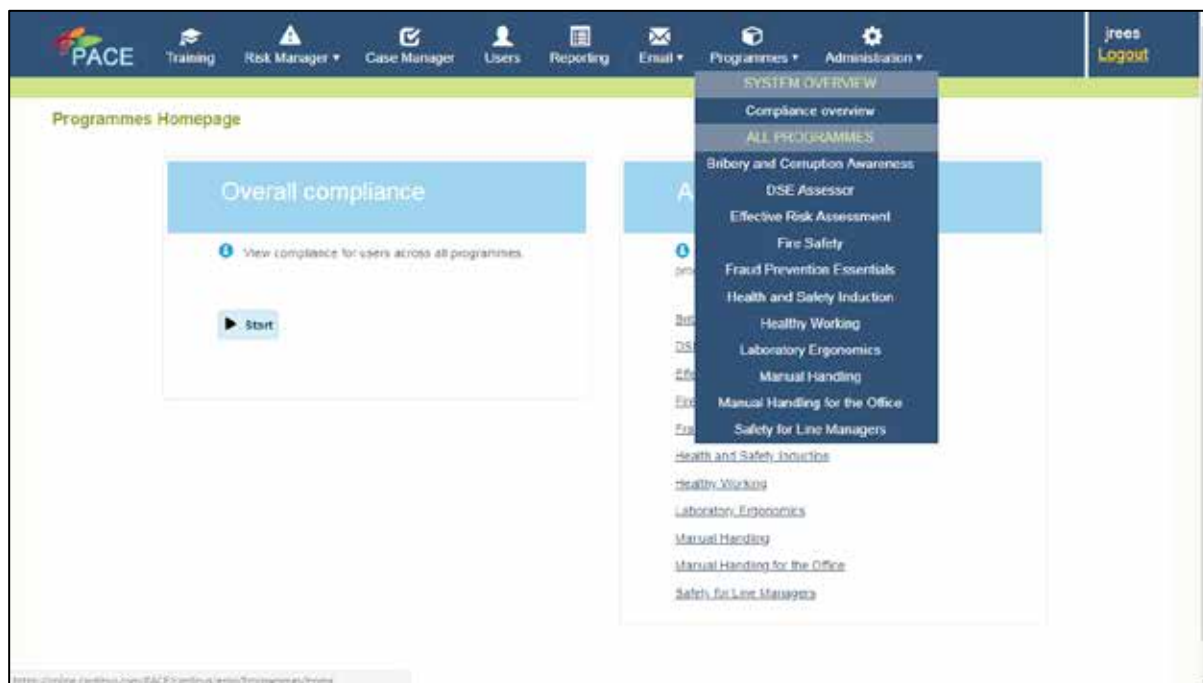
Completed on

Assigned to \*

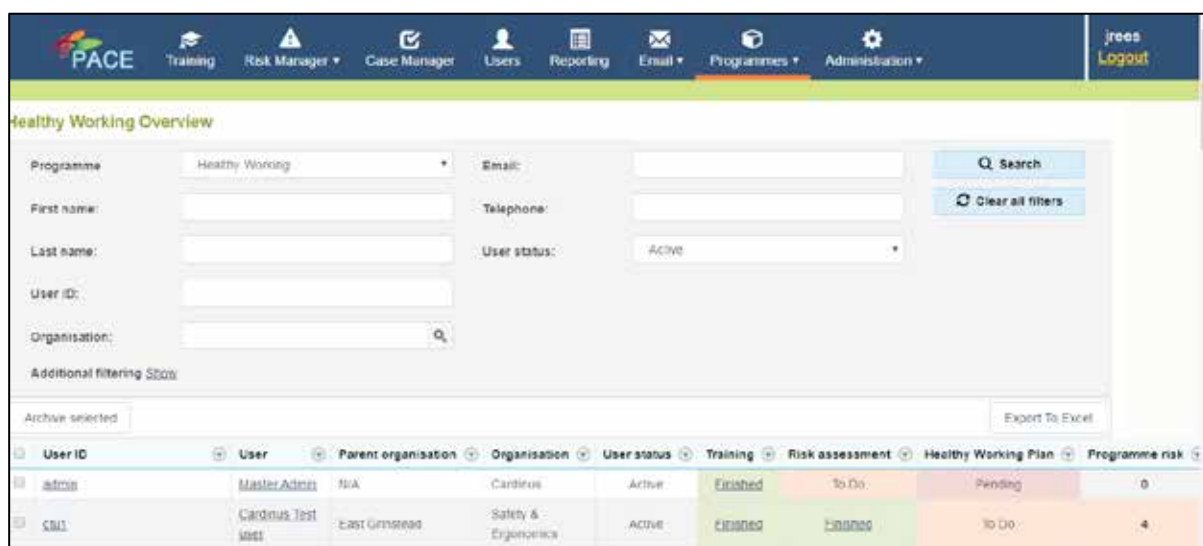
Save

## 7.0 Programmes Menu

The programmes menu shows all the programmes that are in the course hub and the compliance can be seen for each one or a summary.



Clicking on Healthy Working shows the compliance for all users on the system for this programme.



Clicking on Compliance overview will show all the programmes for each person and the compliance for each. Compliance for Healthy Working will only be achieved when all actions in the Healthy Working Plan have been completed.

The screenshot displays the 'Compliance overview' page in the PACE system. The top navigation bar includes links for Training, Risk Manager, Case Manager, Users, Reporting, Email, Programmes (selected), and Administration. A user profile for 'Jees' is visible in the top right corner.

The main content area features a search filter section with the following fields:

- Programme: All
- First name: (empty)
- Last name: Jees
- User ID: (empty)
- Organisation: (empty)
- Email: (empty)
- Telephone: (empty)
- User status: Active

Buttons for 'Search' and 'Clear all filters' are located to the right of the search fields. Below the filters is an 'Export To Excel' button and an 'Additional filtering Show' link.

The main data table lists compliance for user 'Jees'. The table has the following columns:

User ID	User	Parent organisation	Organisation	User status	Overall compliance	BRI	DSE	ERA	FSP	FPV	HSI	HW	LAB	MHF	MHO	SLM
Jees	Jees, Jees	Humanwaker	Safety & Ergonomics	Active	✗	✗	✗	✗	✓	✗	✓	✗	✗	✗	✗	✗

At the bottom of the table, there is a pagination control showing '250 items per page' and 'Items 1 to 1 of 1'. The footer of the page reads '© Cardinus Risk Management'.