

### A Complete Solution to Manage Safety Risk, Compliance, and Programs

Medgate's Workplace Safety Management Software Suite is a powerful, intuitive, and flexible software solution. Developed by Medgate's own certified safety professionals with input from our customers, the software supports a safety management system approach to safety and will help you manage incidents, pro-actively mitigate risks, satisfy compliance requirements, identify problem areas, and track performance.

#### Benefits of Medgate's Safety Software Suite:

- Connect with Medgate's other software suites to integrate OH&S functions and promote effective communication / data sharing between departments and stakeholders
- Track performance and identify key risks, trends, and problem areas with powerful metrics
- Streamline incident management workflows and build consistent processes across sites, business units and/or countries
- Manage regulatory compliance to legal & other requirements (i.e.: OSHA)
- Support safety management systems compliance (ANSI Z10, OHSAS 18001)
- Plan and build effective risk assessment programs: define your work; assess the risks and controls; track change to risk as the work changes; and use risk data to improve your performance
- Manage all audit & inspection programs to help identify and control risks and comply with legal and other requirements
- Centralize your findings and actions together in one logical tracking interface that is consistent across all safety suite modules
- Make informed decisions using Medgate's Business Intelligence tools including dashboards, metrics, standard reports, and a flexible report writer
- Network with an esteemed group of OH&S professionals via Medgate's client community portal, user group conferences, and other educational activities

#### Safety Software Suite Modules



## Audits and Inspections

Developed by safety professionals, the Audits & Inspections module in Medgate's Safety Software Suite is an important tool to help safety professionals manage all aspects of their audit and inspection programs. For clarity, here is how we define audits versus inspections:

### Audits

- Less frequent
- More formalized
- Larger scale/scope
- Often system or program based

### Inspections

- Frequent, repeating
- Large number of inspections/inspectors per year
- Focused/specific
- Often equipment or area based



## Key Benefits of the Audits and Inspections Module

This module will enable you to:

- Set up inspection programs to help identify and control risks and comply with legal and other requirements
- Collect and record all of your various audit and inspection related details, simplifying audit/inspection recordkeeping
- Provide inspection administrators with a central access point to view and manage their full inspection program, including completion status and history of the related findings and actions
- Accelerate communication and action with automated workflows such as automatic email notifications for non-conformances
- Ensure that all actions and items resulting from an audit are satisfactorily completed and closed
- Generate effective reports to review audit/inspection results

## Key Components

The features of this module are grouped in the following categories:

### Creating and Managing Safety Audits

- Create any type of audit and capture relevant details such as audit type, status, start/end dates, lead/back-up auditors, location, etc.
- Consolidate and store all the information collected during your audits, including pictures, documents, questionnaires, and findings/actions
- Customize audit checksheets to your needs with use of the Medgate Questionnaire module
- Configure your system to auto-generate findings based on question responses
- Include risk ratings for each finding
- Assign multiple actions/assignees to one finding
- Generate corrective or preventive actions and ensure action completion via automatic email notifications (including a direct link to the action) sent to assignees
- Track status of all findings and actions related to a specific audit or group of audits
- Multiple legal requirements can be tied to a single audit



## Creating and Managing Safety Inspections

- Create recurrent inspection programs and assign to multiple inspectors/locations
- Customize inspection check sheets to your needs with use of the Medgate Questionnaire module
- Connect inspections to legal and other requirements (integrated with the Compliance Management module)
- Configure automatic reminders to be sent to inspectors and/or their supervisors
- Provide inspection assignees with a complete list of all their inspections with the corresponding status (due, overdue, complete)
- Enable inspection administrators to easily track:
  - Completion status of inspections
  - History of findings/actions generated from the inspection program

## Audits and Inspections Metrics

- Use Medgate's Standard Reports, flexible Report Writer, or Metrics tool to report on virtually any data tracked in the audits/inspections module
- Track audit/inspection completion versus target using the Metrics tool

## Integration Points

The Audits & Inspections module is also available in Medgate's Environmental and Ergonomic Software Suites, and integrates with the following modules in the Safety Software Suite:

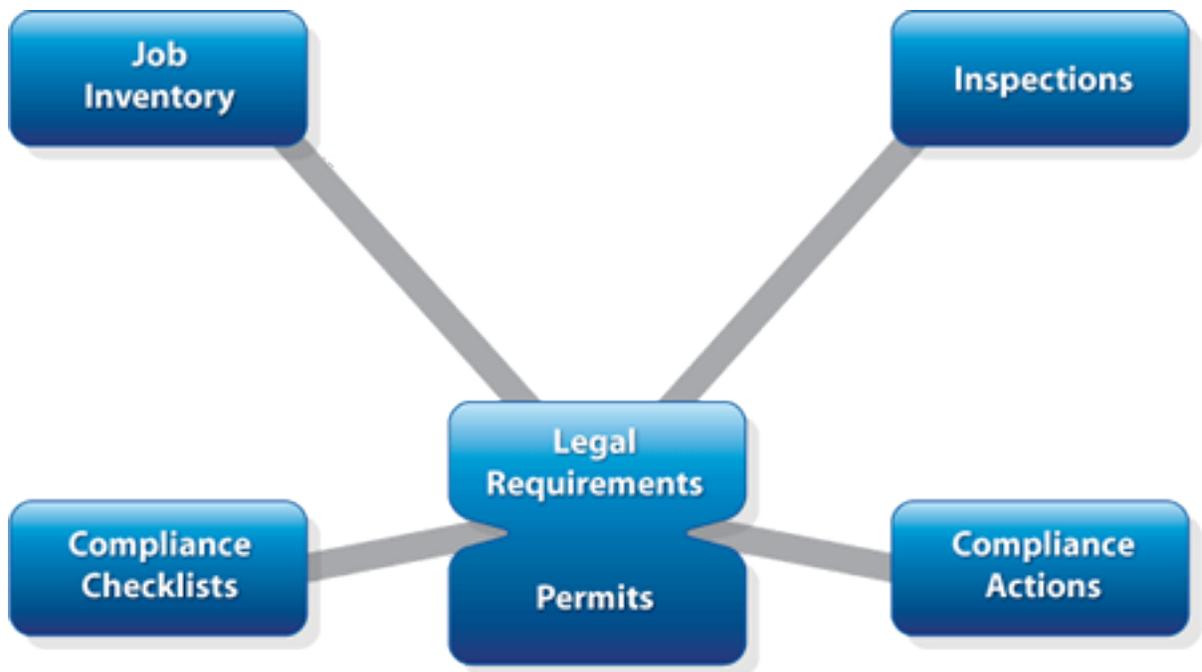
- Compliance Management

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## ***Compliance Management***

The Compliance Management module, a core component of Medgate's Safety Management Software Suite, supports a 'management systems' approach to managing safety-related compliance within your organization. This module is a hub for all compliance tracking activity that will help you satisfy safety management system requirements as well as ensure compliance to various regulatory, corporate, and permit requirements.





## Key Benefits of the Compliance Management Module

The Compliance Management Software module will enable you to:

- Create a library of legal and other requirements that pertain to your organization across regions/ jurisdictions
- Manage and satisfy ISO 14001 / OSHAS 18001/ANSI Z10 requirements
- Allow for separate management of safety and environmental compliance depending on your organizational structure
- Manage permit requirements and renewals, including the related record-keeping
- Seamlessly connect compliance requirements to various parts of your safety system (ie, job inventory, inspections)
- Ensure you are organized and prepared for management system / compliance audits

## Key Components



## Legal and Other Requirements

- Efficiently build and understand your detailed inventory of requirements such as:
  - ISO 14001
  - OHSAS 18001
  - ANSI Z10
  - Federal regulations (OSHA, HSE, etc.)
  - Provincial, state, or local requirements
  - Permits
  - Any other requirement that your organization subscribes to
- Create and track compliance actions corresponding to the requirement (one time or recurring)
- Add checklists, notes, documents, etc. to the compliance item or action
- Connect compliance requirements to jobs within your organization through integration with the risk assessment module (job inventory)
- Utilize legal/other requirements to build needs assessments by location/area (i.e.: risk assessment priority, training needs, equipment testing, etc.)

## Compliance Calendar

- Manage all compliance activities from within one central compliance 'home page' and focus on priority actions
- Maintain a central, comprehensive view of all compliance actions, their statuses, and associated requirements
- Access and update any action record directly from within the main compliance calendar, without having to navigate to other sections of the application

## Metrics

Leverage Medgate's Business Intelligence tools to measure and analyze your compliance data

## Integration Points

The Compliance Management module is integral to both the Safety and Environmental Software Suites. In the Safety Software Suite, it integrates with the following modules:

- Risk Assessment (Job Inventory)
- Audits & Inspections (link inspections to requirements)



## **COSHH**

The COSHH module within Medgate's Safety Software Suite enables organizations to ensure compliance to COSHH requirements. This flexible and robust module is a one-stop shop to identify hazards, perform risk assessments, track controls, ensure compliance, and ultimately mitigate exposures to hazardous substances.

### **Key Benefits of the COSHH Module**

The COSHH module will enable you to:

- Record and manage all COSHH-specific risk assessments
- Effectively evaluate risks to health and decide on appropriate mitigating measures
- Track and evaluate the impact of controls
- Track and trend changes in risk to jobs over time
- Promote effective 'Management of Change' for COSHH-specific actions by creating an automatic link between risk change and actions

### **Key Components**

Below are some of the key features of this module. To learn about the details of how assessments are managed in Medgate, please review the Risk Assessment/JHA module.

- **COSHH Assessments**
  - Configure Medgate's risk assessment tool to be a COSHH assessment for hazardous substances
  - View and manage COSHH assessments separately from other risk assessments
  - Attach documents, images, MSDS', findings & actions to the COSHH assessment
  - Link assessments to specific jobs, sites, locations or business units
  - Create COSHH exposure groups based on job to allow you to effectively implement mitigating actions (ie: training) or recall appropriate employees for COSHH-related surveillance
- **COSHH Metrics**
  - Build flexible graphs with Medgate's metrics tool using any COSHH data so that you can track risk change over time or compare risk in various locations
  - Post any graphs you build to your dashboard
  - Track comparative data, such as targets vs. actual
- **Integration Points**

The COSHH module is only found within Medgate's Safety Software Suite. It integrates with these other modules:

- Compliance Management
- Incident Management



## Equipment

The Equipment module is available in every Medgate Software Suite but is configured differently in each suite as appropriate. As part of Medgate's Safety Software Suite, the Equipment module provides Safety professionals with the ability to comprehensively manage a wide variety of equipment that should be tracked, calibrated, inspected or maintained.

### Key Benefits of the Equipment Module

This module will enable safety professionals to:

- Manage any/all safety-related equipment that requires periodic testing, calibration, inspection or maintenance
- Consolidate all safety, environmental, ergonomic and IH equipment together in one tracking interface, if necessary
- Track all historical information regarding equipment inspection, calibration and maintenance
- Ensure compliance with equipment licensing or permitting requirements
- Streamline and automate calibration/inspection process with automated workflows
- Document and track any issues with the equipment through integration with the Findings & Actions module

### Key Components

#### Equipment Calibration/Inspection Management

- Track data relating to any/all safety-critical equipment, including, but not limited to fall protection gear, emergency eyewash stations, fire extinguishers, and personal protective equipment (e.g. SCBAs)
- Leverage automated workflows to manage equipment maintenance and recall requirements:
  - Date of next recurrence is automatically calculated based on the date of last calibration/inspection and the calibration/inspection period you've defined
  - Automatic recall email notifications remind you when a piece of equipment is due for calibration or maintenance
- Maintain integrity of calibration/inspection tracking and history by allowing the technician to only update specific data (i.e.: allow him/her to update the date of last calibration but not the calibration/inspection period)
- Attach any related documents to the equipment record, such as MSDs, calibration certificates, licenses or permits
- Build and attach checklists to the equipment record and configure findings to auto-generate based on checklist responses



## Equipment Metrics

- Track calibration and inspection activity and due dates with an equipment recall report
- Manipulate / graph equipment calibration and inspection data using Medgate's Business Intelligence tools

## Integration Points

Other than the Safety Suite, the Equipment module is present in Medgate's Ergonomic, Environmental, Industrial Hygiene, and Occupational Health Software Suites.

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## Event Reporting

The Event Reporting module is a component of Medgate's Safety Software Suite and is tightly integrated with Medgate's Incident Management module. This standalone module is used to provide supervisors, managers, clinics, or field employees the ability to quickly record and report safety events without accessing the full Medgate system.

## Key Benefits of the Event Reporting Module

The Event Reporting module enables you to:

- Support broad workforce participation by allowing thousands of non-Medgate users to submit events using simple standalone links (no login required to submit)
- Rapidly gather pertinent information from your workforce on events, incidents, suggestions, or observations
- Increase speed of data sharing by automatically notifying all relevant parties (supervisors, EHS, etc.) when an event report is submitted

## Key Components

The event reporting module will help you improve, accelerate, and streamline the reporting of incidents and events within your organization. The features of the Event Reporting module are grouped as follows:



## Event Reporting

- Allow employees to submit an event to the Medgate system using a simple online form via a kiosk or work station. The event submitter will not have access to any other data in the application
- Report on different types of events:
  - Injury /Illness
  - Property Damage
  - Near Miss
  - Observation / Suggestion / Other
- Configure a unique event reporting form or screen for each type of event, prompting the submitter to enter only the relevant data
- Capture detailed information on the event that can include employees involved, location, description, witnesses, date/time, part of body affected (for injury/illness), etc.
- Allow the event submitter to attach documents/pictures and suggest actions
- Trigger automatic email notifications to any and all relevant parties within your organization (ie: safety manager)once the event report has been saved and submitted

## Event Reporting Inbox

- View and review all events reported through the standalone event reporting module through one central access point
- Post an event to the Incident Management module once it has been reviewed and validated. You can post to an existing incident report or create a new one. If you are creating a new incident report, the following will happen:
  - The original event report will be read-only
  - The incident report fields in the Incident Management module will be auto-populated with the relevant data, so you can efficiently complete the record
- Once the event has been posted, you can launch a comprehensive incident investigation process through the Incident Management module
- Tally any non-incident events (ie: # of observations by area) using Medgate's Metrics tool

## Metrics

Manipulate event reporting data and build graphs using Medgate's Metrics tool

## Integration Points

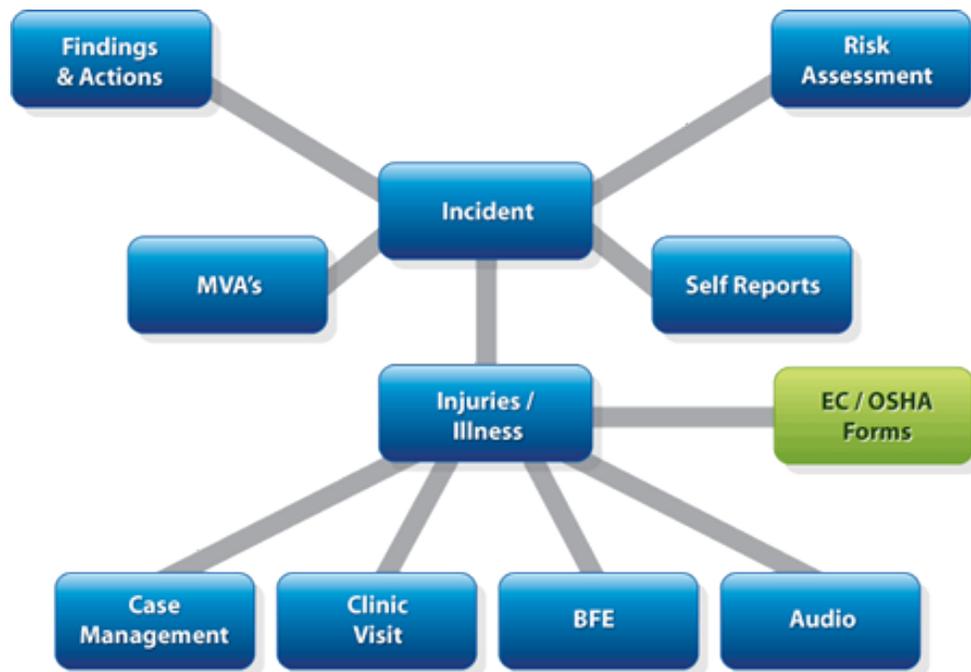
The Event Reporting module is part of both the Medgate Safety and Environmental Software Suites, but is configured differently to respond to the unique data collection needs of each area. In the Safety Software Suite, it integrates with the following:

- Incident Management Module



## Incident Management

The Incident Management software module is a cornerstone of Medgate's Safety Software Suite. Developed and enhanced by safety professionals with field experience, it is powerful incident reporting software that enables organizations to collect comprehensive incident data, create an accurate picture of the event, identify root causes and learning points, implement corrective actions, and ensure proper incident notification up the chain of command.



## Key Benefits of the Incident Management Module

This module will enable organisations to:

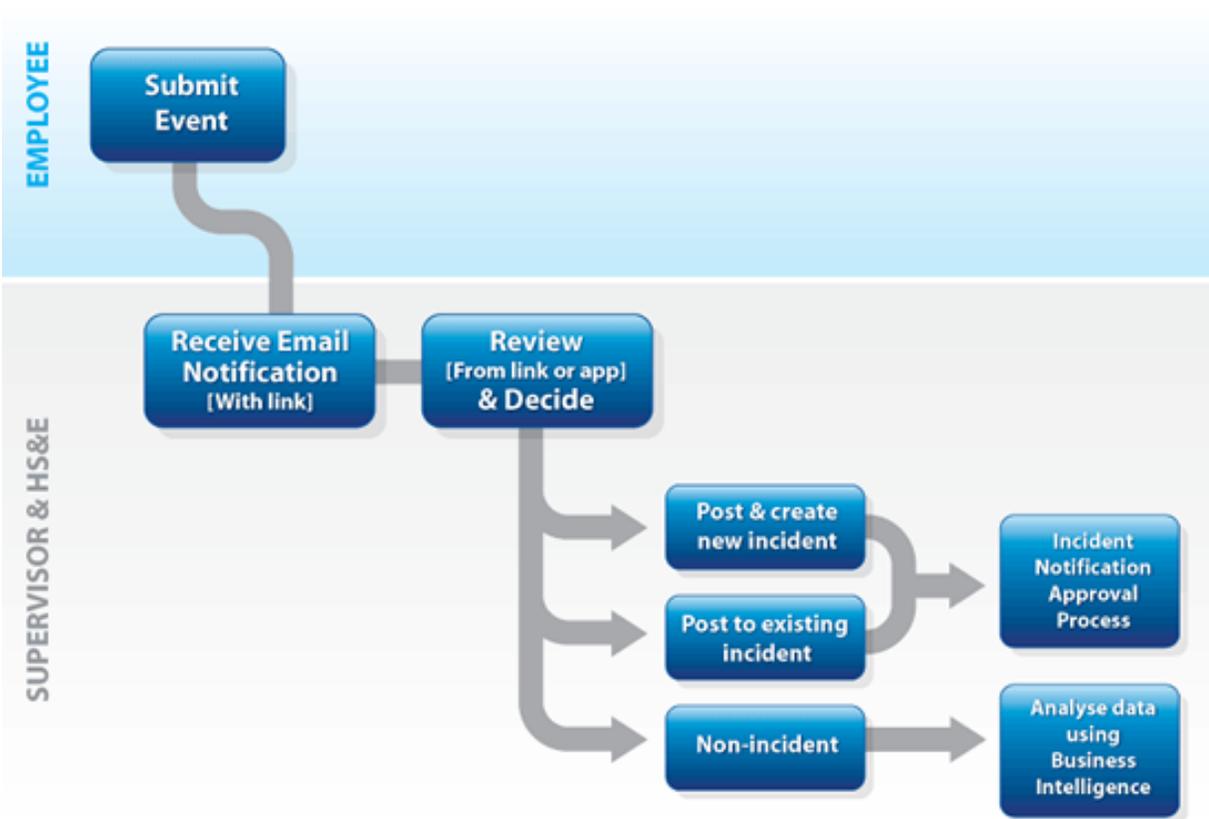
- Streamline incident reporting and investigation workflow and build a consistent process across sites, business units, and/or countries
- Improve and accelerate information sharing between medical staff, case managers, safety professionals, supervisors, and managers
- Promote data integrity and compliance with complete, comprehensive, and accurate incident reports and investigations
- Implement actions that will prevent a similar incident from happening again
- Use Medgate's Business Intelligence tools to track safety performance and identify root causes, risks, hazards, and trends so you can prioritize efforts and make impactful changes
- Streamline claims management with auto-generation of regulatory forms and logs
- Support adherence to safety management system standards



## Key Components

This module includes many invaluable features that will help you quickly and effectively realize the benefits described above. The features fall into 6 groups:

## Incident Reporting and Notification



- Capture data for any type of safety event:
  - Incidents resulting in injury or illness
  - Near-misses
  - Property damage
  - Any other type of loss or event that your company wishes to capture
- Begin the incident workflow from several modules within the Medgate system:
  - Event reporting (an employee or supervisor reports an event)
  - Clinic visit (an employee visits the medical clinic because he/she is sick or injured)
  - Audiometric testing (the clinic has identified hearing loss)
  - Body fluid exposures (the clinic has identified an exposure)
  - Case management
  - Within the Incident Management module itself (for companies not using event reporting or for non-injury/illness events)
- Automatically notify any and all relevant parties (H&S staff, managers, etc) once an incident report has been filed
- Send incident summary reports to any designated parties within the organization
- Simplify regulatory form completion with with auto-population of pertinent incident data. Standard forms include (but aren't limited to) the employers' first report of injury for any state or province (ie: Form 7) and federal forms such as the OSHA 301 log in the US and the RIDDOR form in the UK
- The incident investigation workflow can be automatically started upon submission of an incident

### Data Collection and Investigation

- Collect various incident data and consolidate in one main incident record:
  - Witness statements and contact information
  - Photos of the scene or incident
  - Any documents related to the event
  - Data collected using company-specific questionnaires / checklists
- Attach any and all related event reports that have been filed by employees using the Event Reporting module
- View risk assessments relating to the incident in order to gather valuable lessons learned data for the job in question within the incident record
- Classify/categorize the incident according to your standards with numerous user-defined fields
- Configure and follow an investigation completion and approval workflow according to your company process

### Root Cause Analysis

- Use a decision tree model for easy visualization of '5 Why' root cause analysis. With this non-linear method of root cause analysis, you can:
  - Track multiple reasons and sub-reasons as to why the event may have occurred
  - Select the most fitting underlying cause to include on the incident record
- Once you are satisfied with the data you've collected, you can begin the approval process; your decision tree will be stored on the record for future review if needed



## Investigation Approvals and Corrective Action Taking

- Streamline incident approval workflow and action assignment, ensuring that the incident approval process is complete and accurate:
- Trigger an automated investigation workflow/approval escalation process that moves through the appropriate chain of command for the employee in question
- Automatically generate and send assignment emails containing pertinent incident information and a standalone link that allows the assignee to access and update the incident record
- Configure reminders to run at different frequencies before and after the activity due date
- Maintain a history of incident approvals/rejections along with approver comments
- Seamlessly connect actions to findings, allowing your action workflow to be automatically triggered when a specified finding is recorded
- Manage incident and other safety-related findings & actions in the Findings & Actions module for quick access to all active actions

## Incident Management Metrics

Medgate's comprehensive Business Intelligence tools will empower you with meaningful data. You'll be able to analyze incident data, track safety performance, and identify trends, hazards, and root causes.

- Provides three incident reporting options that enable you to visualize your progress and performance:
  - Flexible canned reports that allow you to run common H&S metrics with multiple filtering options
  - Robust report writer that can pull simple or complex reports on any data in the system
  - A powerful data cube that offers drag and drop functionality and allows you to see multi-dimensional metrics with limitless possibilities
- Allows you to post your most important reports to your safety dashboard

## Integration Points

Medgate's Incident Management software module integrates with the Occupational Health Software Suite (for any injury/illness incidents) as well as these other modules in the Medgate Safety Software Suite:

- Event Reporting
- Risk Assessment/JHA

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## Respirator Fit Testing

Developed by safety professionals, the Respirator Fit Testing module in Medgate's Safety Software Suite and Industrial Hygiene Suite is an important tool to help safety and hygiene professionals manage all aspects of their respirator fit programs.



## Key Benefits of the Respirator Fit Testing Module

- Record both qualitative and quantitative fit testing results
- Review medical clearance information transferred directly from the Pulmonary Function Testing module
- Capture results directly through interfaces with respirator fit testing units including the Portacount™ and OHD™ units
- Automatically recall employees for regular respirator fit testing based on date of last test; run reports to view all employees scheduled for respirator fit testing/training
- View the employee's work restrictions as recorded in various Occupational Health Suite modules
- View a summary of all respirators cleared for use by the employee, as well as the respirators on which the employee is due to be re-tested
- Track the equipment used for the test

## Integration Points

The Respirator Fit Testing module is available in Medgate's Safety and Hygiene Software Suites.

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## *Risk Assessment/JHA Module*

The Risk Assessment/JHA module is an important component of Medgate's Safety Software Suite. Medgate's team of safety professionals have collaborated with safety experts from our client companies to deliver market-leading risk assessment software. This robust module will enable you to plan and build an effective risk assessment program and perform ongoing analysis to continuously evaluate and mitigate risk.

## Key Benefits of the Risk Assessment/JHA Module

The Risk Assessment/JHA module will enable you to:

- Manage your job inventory, JHA/JSA, and risk assessments through a simple and configurable interface that promotes logical, efficient workflow
- Pro-actively evaluate and mitigate risk by tracking and trending changes in risk to jobs over time
- Support efficient compliance management by tracking legal and procedural requirements by job while performing assessments
- Promote effective 'Management of Change' by linking risk change to actions
- Connect seamlessly to the incident investigation process, providing your investigators insight into the cause of the incident and your assessors insight into where risk assessment improvements can be made





### Key Components

This module includes many invaluable features that will help you quickly and effectively realize the benefits described above. The features fall into four groups:



## Job Inventory

- Keep an active inventory/description of the continuously evolving scope of your work by managing an active list of 'jobs' or 'risk units' which require an assessment
- Track and view all related procedures to a job within the job record, including procedure documents and procedure status (ie: procedure is adequate and understood, not followed, etc.)
- Link any number of legal and other requirements to each job so that you can efficiently build a needs assessments by job / area
- Create exposure groups based on job and add jobs to an exposure group based on risk assessments. This offers a powerful way to implement mitigating actions (ie: training) or recall employees for job required surveillance such as respirator fit testing or medical surveillance.

## Risk Assessment/Job Hazard Analysis (JHA)

- Track all task, hazard, control, and risk assessment inputs in one record, allowing you to easily visualize the risk, understand key controls, and prioritize actions for risk reduction
- Configure the tool to your company risk assessment methodology: choose which risk factors, control factors, formulas, colours, icons, values you require
- Allow assessors to describe task, hazards, and controls with both free text and user-defined drop-down choices
- Visualize the risk before and after a control is introduced and offers a third iteration of risk that is based on an ideal / future control
- Use a powerful and configurable risk calculation tool to automatically determine risk based on your requirements. This tool can:
  - Incorporate up to 12 different factors including probability, severity, and frequency
  - Calculate risk using a matrix model with pre-defined risk level for each quadrant, OR
  - Calculate risk using user-defined simple or complex formulas
- View Job Hazard Analysis in a separate, simplified view for worker training and compliance to JHA requirements. There is also a system-generated JHA report.
- Link to incident investigation data so that investigators can view active assessments related to a job where an incident occurred
- Improve efficiency using tools such as copy, clone, and inactivation actions for a risk assessment task

## Risk Assessment Metrics

- Use Medgate's Metrics tool to build flexible graphs using any risk data so that you can track risk change over time or compare risk in various locations
- Post any graphs you build to your dashboard
- Define any custom measures that you wish to track, and use those measures to compare to standard Medgate system measures (for example, track targets vs. actual)





## Integration Points

In addition to the Safety Suite, the Risk Assessment module is present in Medgate's Environmental, Industrial Hygiene, Occupational Health, and Ergonomics Software Suites. In the Safety Software Suite, the Risk Assessment module integrates with the following modules:

- Compliance Management
- Incident Management