

Reporting Personal Injury and Property Damage Events

TDOT User Guide for Incident Reporters

Introduction

This user guide provides instructions for reporting **personal injuries** and **property damage**. Any TDOT employee can report a personal injury event or property damage event. In this user guide, we will use the term '**Incident Reporters**' to refer to anyone who documents a personal injury event or property damage event on a Personal Injury Form or Property Damage Form.

Reporting Process Overview

Personal Injury Forms and **Property Damage Forms** are accessible from the TDOT Human Resources SharePoint Site. To report a personal injury or property damage event, you will need to complete and submit a form. When completing the form, you will select the Safety [Approver] Group for your location, i.e. Headquarters, Region 1, Region 2, Region 3 or Region 4. Upon submission, the system will route your form approver(s) in the selected Safety [Approver] Group. Approvers in the selected Safety Group will review, validate and approve the submitted form. The system will route the approved form to TDOT Headquarters Safety Staff for responsive action to your reported incident validated by the Safety [Approver] Group specified on the approved form. During the validation process, approvers can request revisions. If the approver requests one or more revisions, Incident Reporters will need to revise the submitted form and send the revised form back to the approver. The request for revisions can be an iterative process until an approver is ready to approve the submitted form for responsive action. The validation process ensures all forms sent to the TDOT Headquarters Safety Staff contain a sufficient amount of information for responsive action. Approvers have the option to route the submitted form to another individual who is better suited to approve the submitted form. Only one approver is required. Once the approver approves the submitted form, the system routes the form to the TDOT Headquarters Safety Staff for responsive action. Microsoft SharePoint software manages the submission, validation, routing and approval workflow using system-generated email capabilities and task scheduling features. Incident Reporters and Approvers respond to email notification and click on links to access forms and participate in this system-managed workflow.

Incident Reporter Role

Incident Reporters complete and submit the **Personal Injury Forms** and **Property Damage Forms** whenever an incident report occurs. Incident Reporters will use this process to document the incident. Upon submission of an incident form, the Incident Reporter will receive

a request for revisions by email if the approver requires one or more revisions to the submitted form. Incident Reporters will revise the form, as requested, and send the revised form by following instructions in the system-generated email request for revisions. Once an approver approves the form as ready for processing, the system will route the approved form to the TDOT Headquarters Safety Staff for responsive action.

Your experience in the incident reporting workflow will be as follows:

1. *Obtain Incident Form* – You only need a form when there is an incident to report.
2. *Complete and Submit Incident Form* – Complete a form to document the incident.
3. *Revise Form and Send Revised Form* – Revise form when requested by email.
4. *Wait for Responsive Action* – You receive email confirmation regarding form status.

Step 1: Obtain Incident Form

Both forms are located on the TDOT Human Resources SharePoint site as shown in **Figure 1**. Use this URL: <https://tennessee.sharepoint.com/sites/TDOT/BOA/HR/SitePages/Home.aspx>

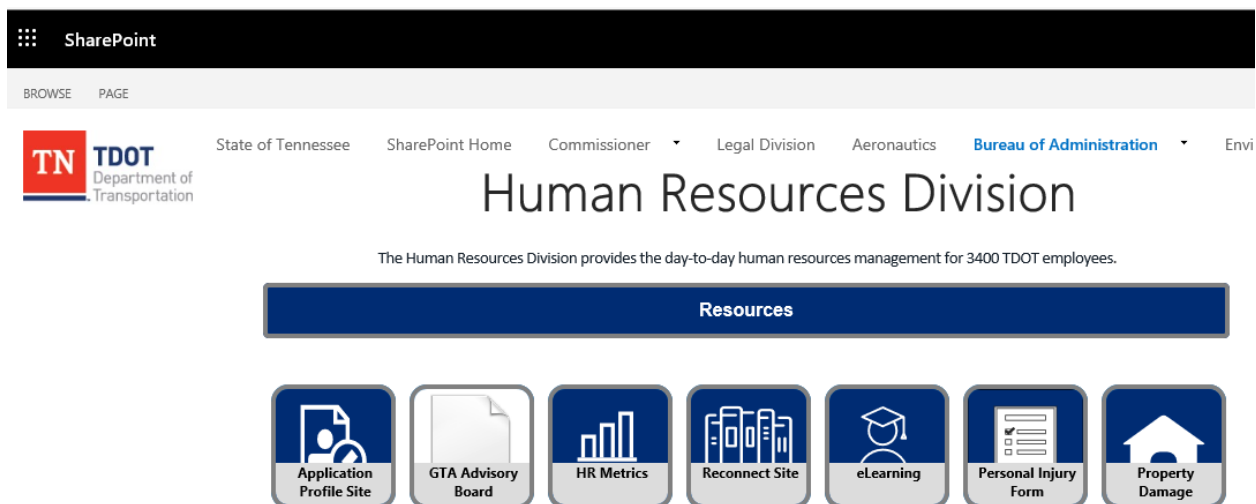


Figure 1: TDOT Human Resources SharePoint Site – Form Icons

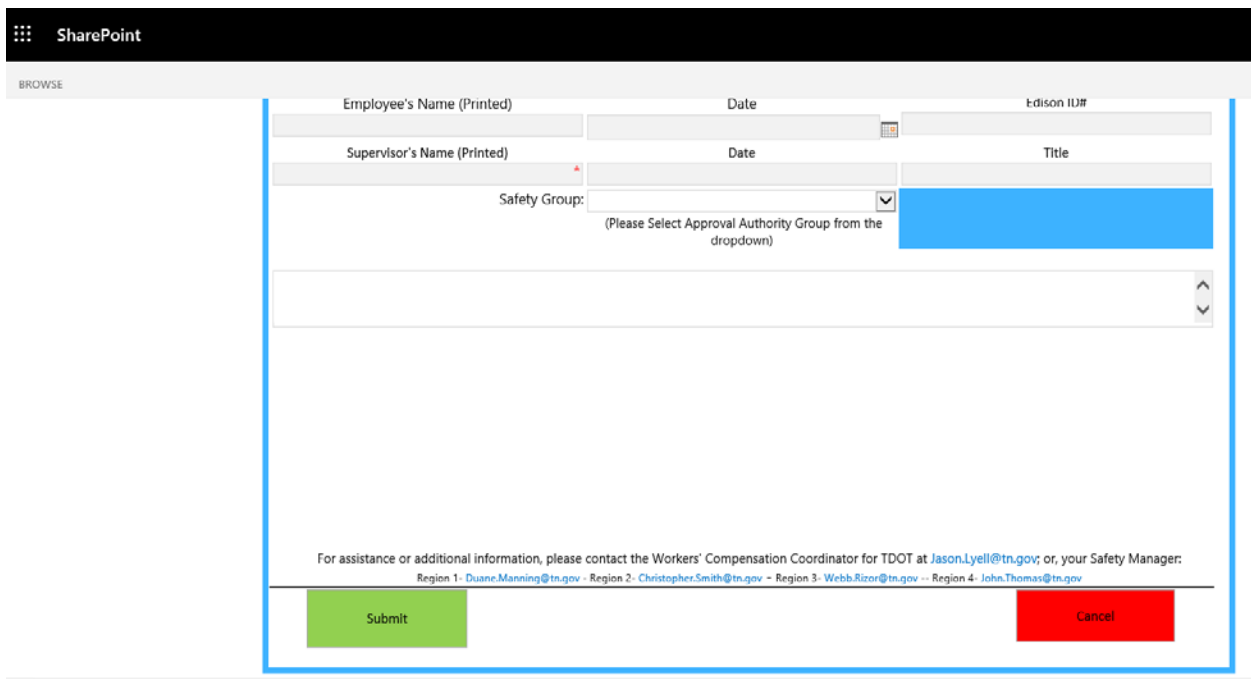
Form Options:

- Select the *Personal Injury Form icon* to obtain a ***Personal Injury Form***.
- Select the *Property Damage Form icon* to obtain a ***Property Damage Form***.

When you click on one of these form icons, you will receive a popup screen with your selected form. Proceed to Step 2.

Step 2: Complete and Submit Incident Form

Once you select a form icon on the TDOT Human Resources SharePoint Site, you will obtain a popup screen with a blank form based on which form icon you selected in Step 1. Use the vertical scroll bar to scroll up and down the form page. If you wish to print a copy of the form, you may do so by right clicking your mouse select “Print”. If you want to save a copy of the form, right click your mouse and select “Print”. In the Print window under “Select Printer” select “Adobe PDF”. This will allow you to save a copy of the form. Be sure to select a location in the Safety Group field at the bottom of the form. This aids the system in routing your form to approvers in your location. **Figure 2** illustrates the bottom of the form where the Submit button is located and shows the location of the Safety [Approver] Group field.



The screenshot shows the bottom portion of a SharePoint form. At the top left, there is a 'SharePoint' header. Below it, the word 'BROWSE' is visible. The form contains several input fields: 'Employee's Name (Printed)', 'Date', and 'Edison ID#' in the first row; 'Supervisor's Name (Printed)', 'Date', and 'Title' in the second row. A 'Safety Group:' dropdown menu is highlighted with a blue background, with a note below it: '(Please Select Approval Authority Group from the dropdown)'. At the bottom of the form, there are two buttons: a green 'Submit' button and a red 'Cancel' button. A footer contains contact information for the Workers' Compensation Coordinator for TDOT, listing email addresses for four regions: Region 1 (Duane.Manning@tn.gov), Region 2 (Christopher.Smith@tn.gov), Region 3 (Webb.Rizor@tn.gov), and Region 4 (John.Thomas@tn.gov).

Figure 2: Bottom of Form – Submit Button and Safety [Approver] Group field

As mentioned, be sure to select the Safety [Approver] Group prior to clicking the Submit button. You will have the option to select Headquarters, Region 1, Region 2, Region 3 or Region 4. The system will use your Safety Group selection to route your form to one or more approver(s) in the selected Safety [Approver] Group. After you click the Submit button, the system will send you an email that tells you the approval process has started, as illustrated in **Figure 3**. No action is required.

Approval has started on [\(no title\)](#).

Participants are Headquarters Safety Group
Due by None

Each person will receive a task to approve [\(no title\)](#). The tasks will be assigned one at a time for participants shown above.

Figure 3: Email Notification 1 – After initial submission of an incident form

When you receive this email, you do not need to do anything. No action is required. This email is merely letting you know the approval process to validate your submitted form has started and now in progress.

If an approver needs you to make revisions, the approver has an option to send a system-generated revision request to you. If you receive a revision request email, follow instructions in Step 3.

Unless you receive request(s) by email to revise your submitted form, proceed to Step 4.

Step 3: Revise Form and Send Revised Form

IF you receive a request by email to revise a submitted form, as illustrated in Figure 4, follow instructions listed below Figure 4.

Task assigned by David Haleman on 7/18/2019.

Due by None

Approval started by David Haleman on 7/18/2019 1:26 PM
Comment:

Change Requested of David Haleman by Patty A. Brightup on 7/18/2019 1:37 PM
Comment: Change Line 4 to include location of injury - Test comment.

To complete this task:

1. Review [TEST TEST](#).
2. Perform the specific activities required for this task.
3. Use the **Open this task** button to mark the task as completed. (If you cannot update this task, you might not have access to it.)

Figure 4: Email Notification 2 – Revision Request Email

SharePoint creates a task for the revision request.

If you receive a revision request email (Figure 4), follow these instructions:

1. Look for revision request in the Comments section. *Note: In Figure 4, the request is “Change Line 4 to include location of injury – Test Comment”.*
2. Click on the form link at the bottom of the email. *Note: In Figure 4, the form link titled “TEST TEST”.* By clicking on the form link, you will obtain the submitted form you are being asked to revise to make the requested changes in the email Comments area.
3. After you click the form link in the revision request email and the form opens in a popup screen, click the Edit option, revise form and click the Save option to save your changes.
4. After you finish making revisions, click the Save option to save your changes. Now you need to notify the approver you made the requested changes. Do #5 now.
5. Open the Revision Request Email (Figure 4) again. Click on the Message Tab and select the “Open this Task” option in the Message Tab ribbon menu area. You will receive the popup screen in **Figure 5**. Enter your revision comments you want to send back to the Approver, i.e. “I made the requested changes”, and click the Send Response button.
6. This is all you need to do. SharePoint will send an email notification to the approver who requested the revisions. The Approver can request additional revisions. Continue to follow instructions in Step 3 every time you receive a revision request email. Unless you receive other revision request emails, proceed to Step 4.


Status	In Progress
Requested By	David Haleman;
Request	Change line 5 <small>These are the comments from the person requesting the change.</small>
Due Date	7/27/2019 
Comments	Made the update you had requested <small>This message will be included in your response.</small>
<input type="button" value="Send Response"/> <input type="button" value="Cancel"/>	

Figure 5: Requestor Revision Response Screen – Send Revision Response

Proceed to Step 4.

Step 4: Wait for Responsive Action

When an Approver approves your form, you will receive a final confirmation email, illustrated in **Figure 6**. This final confirmation email lets you know the approval process has completed for your submitted form. This means the approver assigned to review, validate and approve your submitted form determined that your submitted form contains a sufficient amount of information necessary for the TDOT Headquarters Safety Staff to take responsive action on your submitted form.

Approval has completed on [\(no title\)](#).

Approval on (no title) has successfully completed. All participants have completed their tasks.

Approval started by Patty A. Brightup on 7/18/2019 1:11 PM
Comment:

Approved by David Haleman on 7/18/2019 1:17 PM
Comment:

Approved by David Haleman on 7/18/2019 1:18 PM
Comment:

Figure 6: Email Notification 3 – Final Confirmation Email

When you receive this email, you will know the Approver has approved your submitted form as valid and the system has routed your approved form to the TDOT Headquarters Safety Staff for responsive action. This concludes the instructions for reporting incidents at TDOT.