



Action Tracker

Web EHSdesk™ provides a fully integrated suite of web-based software applications designed to support administrative, operational, and business process information management associated with Environment, Health, and Safety (EHS).

The **Action Tracker (ACT)** application maintains the various action items involved with managing the EHS or Quality requirements of an organization. Action Tracker provides the ability to track action items independent of the subject matter covered in other Web EHSdesk applications. An action item can be one-time or a recurring series based on a frequency and can be high level (Compact) or broken down into line item tasks (Full). The use of plan items allows you to divide the overall requirements into individual actions items. Action Tracker proactively reminds users via e-mail of coming due or overdue action items.

Features and Functionality

- Ability to break down requirements into multiple line item tasks to delegate multiple responsible persons
- Plan items can be established to divide the overall requirements into individual action items
- Two methods for managing Action Items (Full and Compact) depending on business needs and required level of detail
- Task Owners, business drivers, recurring events, status, and contacts can be maintained for each Action Item
- Maintain Pass/Fail status for routine medical exams (e.g., eye exams, respiratory fit, etc.)

Benefits

- Consistent Action Item tracking process across many disciplines provides standard work
- One central point for ease of use by Action Item Owner and Plan Item Owner to view and status plans and action items
- Robust business process emerges while allowing individual flexibility
- Improves management visibility through status reports
- Proactive e-mail notification results in expedited closure of open Action Items
- Allows multi-year planning to align EHS planning with financial planning cycles

Action Item Summary

The following is a summary of the information for the selected Action Item.

Action Item Details		View	Edit
Action Item No.: 1622	Owner: Cottle, Betsy		
Status/Due Date: Open Series	Type/Name: EHS / Quarterly Validation of Environmental Projects and Initiatives with Corporate		
Location: Facility East	Org: Demo Co.		
Action Item Desc.: At a minimum, review, maintain and validate quarterly environmental data housed in tool: waste, water, energy, motor vehicles, air, water BMPs, and environmental projects not identified as Environmental Top Projects. Update Top Projects as changes occur			

Tasks Series Occurrences Files EHS Objects Drivers Plans

Action Item Occurrences						Hide Closed Items
Occurrence No.	Due Date	Name	Owner	Status		
1	03/31/2023	Quarterly Validation of Environmental Projects and Initiatives with Corporate	Cottle, Betsy	Closed	View	Print

Task Occurrences						Add
Task No.	Due Date	Name	Owner	Status		
1	03/31/2023	Update Quarterly Validation of Status	Ostwald, Liz	Closed	View	

Action Item Summary (Full Action Item)

Plan Item Summary Report

Plan Item Details	
Plan Item No.: 1007	Plan Type: Annual Plan
Plan Element: 1005 Training Management	Status: Open
Plan Item Name: Annual EHS Training	
Plan Description: Initial workplace safety training and refresher courses for all employees and contractors	
Plan Item Owner: Tester, Amy	Issue Person: Tester, Amy
Location: TEST SITE	Org: DEPT 01: Operations
Issue Date: 07/20/2017	Start Date: 07/01/2017
Close Date:	Close Person:
Also Known As: Compliance Training	% Complete: 33
Compliance Related?: Yes	Priority: High
Comment: This training will help maintain compliance with OSHA Training Requirements	
Estimated Cost: 5000.00 \$USD	Actual Cost:

Business Drivers		
Driver Type	Driver Name	Driver Description
Annual Plan	Annual Plan Requirement	

Action Items					
No.	Due Date	Name	Owner	Status	
129 - 0	06/30/2016	General Safety	Safety, Sam	Open	
267 - 0	06/30/2016	EHS Safety Plan	Tester, Jayne	Open	
1270 - 0	09/01/2017	Annual EHS Training	Tester, Amy	Closed	

Plan Item Summary Report

E-mail/Reports

- Simple "Quick Form" interface for closing Action Items and tasks
- A recurring series can be established for those action items that repeat monthly, quarterly, etc.
 - Typical users include EHS Managers, Quality and Medical Professionals, and Task Owners


- Ad hoc reporting is available using a flexible search with multiple filters; query results can be printed or saved to an Excel™ or Acrobat™ format
- Summary Reports available to print available action item/plan item data in a report format for e-mailing/printing to include any uploaded pictures
- Various status and inventory reports available to report out on the action item/plan item data
- Automatic notification e-mail sent to Task Owners, as well as weekly status e-mail to Action Item Owners

Integration Points

- EHSdesk **Admin**: associate an ACT record with equipment, confined spaces, Shop ERGO assessments, and Risk Assessments
- EHSdesk **Regulation Manager (REG)**: action items are automatically created based on renewal and expiration dates of regulation records

Compliance

Assists in meeting requirements of ISO 9001, OHSAS 18001, and ISO 14001





Process Flow

