



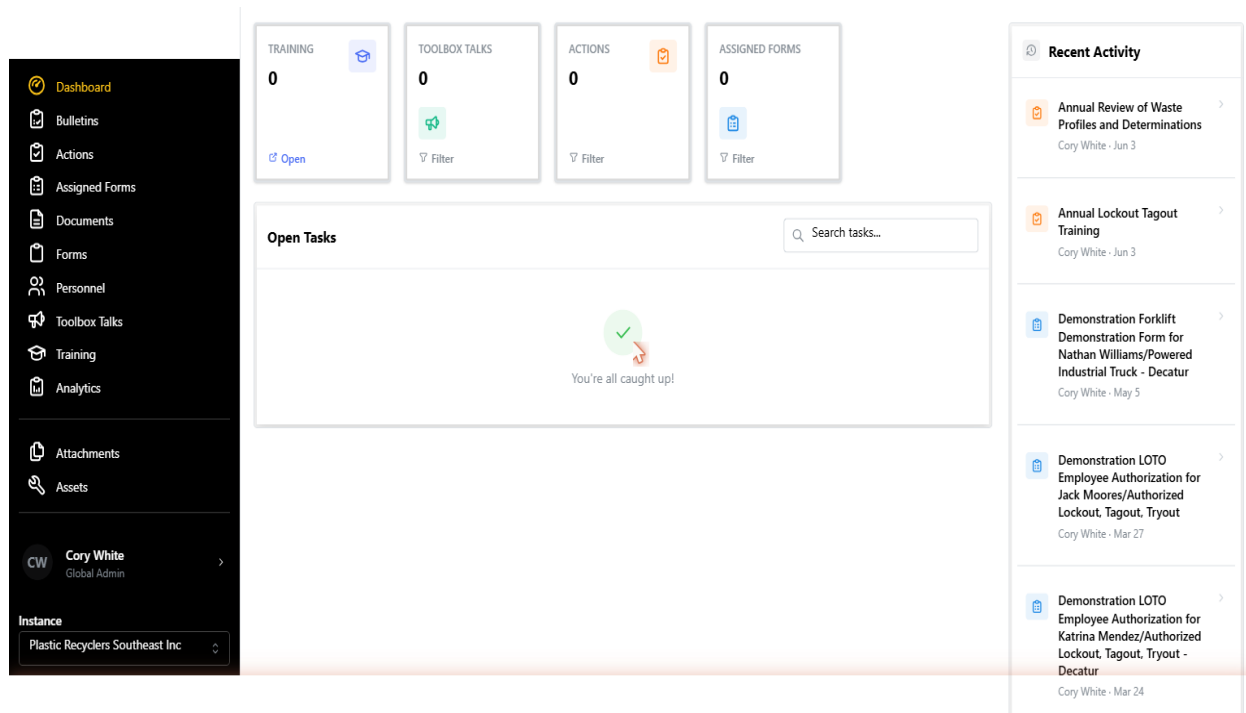
Administrator How-To Guide

Step-by-step instructions for all admin workflows

June 2026

ProactEHS Navigation Overview

ProactEHS uses a dark left sidebar for navigation. All major modules are listed there. At the top of the sidebar you will see the ProactEHS logo, and below it the list of modules available to you based on your instance configuration.



The main content area (to the right of the sidebar) changes based on which module you click. Yellow buttons (like + Create or + New) are action buttons — they always start a new item. Colored status badges (green = active/complete, blue = open, yellow = draft) tell you the state of each item at a glance.

Note: The modules visible in your sidebar depend on which features are enabled for your ProactEHS instance. If you don't see a module listed here, it may not be enabled for your organization.

Tip: If you are ever unsure where to go, look for the module name in the left sidebar and click it. Every workflow in this guide starts from the sidebar.

Personnel — Managing Your Employees

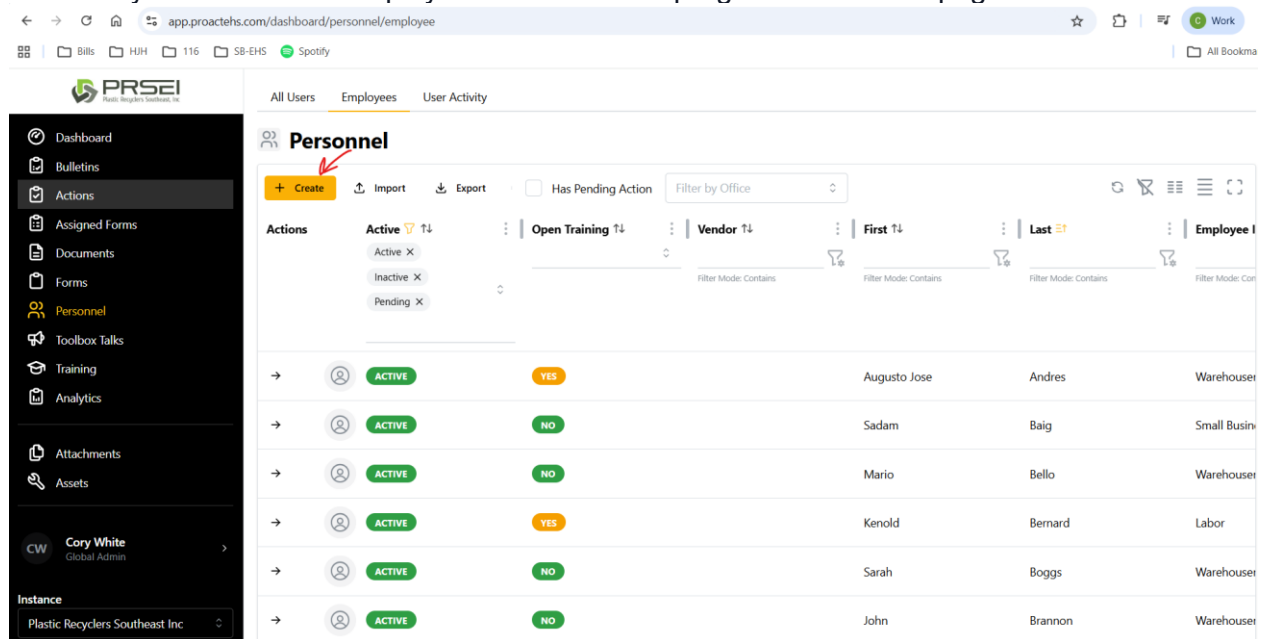
The Personnel module is where you manage all people in your organization — employees and contractors. From here you can add new employees, view their profiles, manage their training, reset passwords, and more.

Adding a New Employee

Use this workflow any time you need to add a new person to ProactEHS. This creates their account and allows you to assign them training, forms, and actions.

⚠ Important: You must go to Personnel > Employees tab to create a new employee. Do NOT use the 'All Users' tab for this — the 'All Users' tab is for viewing only. The Employees tab has the '+ Create Employee' button.

1. Click Personnel in the left sidebar.
2. At the top of the page, you will see several tabs: All Users, Employees, Contractors, and Archived. Click the Employees tab.
3. Click the yellow + Create Employee button in the top-right corner of the page.



4. The Create Employee form will open. Fill in all required fields (marked with *):
 - First Name * and Last Name * — the employee's full name.
 - Email * — the employee's work email address. This is what they will use to log in.
 - Employee ID * — a unique identifier for this person (e.g., EMP-0042). You can use any format your organization uses.
 - Role * — select User for a standard employee, or Admin if they will manage the system.

← Go Back | Employees > New User

New User

Overview Item Tracker Actions Assigned Forms Toolbox Tools Related Forms Training Notes Attachments Related Attachments Notifications

Job Code
Enter job code

Job Title
Enter job title

Supervisor
Type to search

Department

Email
Enter email

Employee ID
Enter employee id

Name
Enter name

First Name
Enter first name

Last Name
Enter last name

Role
Select role

Phone Number
+1

☐ Suspended No

☐ Leave of Absence No

☒ Eligibility Yes

☐ Military Veteran No

Military Service Branch
Enter military service branch

Hired At

Service Date At

Termination Date

Retired At

Picture
File type must be jpg or png. File size must be less than 1MB. Image should be a 1:1 aspect ratio (square).

Drag files here or click to select files

- Attach a single file
- Files should not exceed 10 MB
- Allowed file types: image/png, image/gif, image/jpeg, image/svg+xml, image/webp, image/avif, image/heic, image/heif

No files uploaded

Save

5. Fill in any optional fields as needed: Job Title, Supervisor, Department, Office, and Phone Number.
6. Click Save. The employee will be added to the system and will receive a welcome email with login instructions.

Note: After creating the employee, they will receive an email invitation to set up their password. If they don't receive it, you can resend it using the Authentication tab — see the 'Resetting an Employee's Password' section below.

Resetting an Employee's Password

If an employee is locked out, forgot their password, or can't log in, use this workflow to help them regain access.

1. Click Personnel in the left sidebar.
2. Find the employee using the search bar or by scrolling the list. Click the arrow (→) next to their name to open their profile.
3. On the employee's profile page, click the Authentication tab.
4. On the right side of the screen you will see the Login Support panel. This shows their current login email and account status.
5. Scroll down to the Resync User Login section. Click the red Resync User button.

- The employee will receive a new invitation email. Tell them to check their inbox and click the link to set a new password.

The screenshot displays the Proact EHS system's Authentication tab. The sidebar on the left lists various navigation options, including Personnel, Training, and Analytics. The main content area is divided into several sections: 'Email Delivery Status' (No Suppression), 'Lock User Account' (with a 'Lock User' button), 'Deactivate User Account' (with a 'Deactivate User' button), and 'Resync User Login' (with a 'Resync User' button). A red arrow points to the 'Authentication' tab in the top navigation bar. Another red arrow points to the 'Resync User' button. On the right, there is a 'Login Support' section with a 'Refresh' button and a 'FORCE PASSWORD CHANGE' button. Below this is a 'Recommended Action' section with instructions for users who cannot find their email.

Note: Resync User Login deletes and recreates the employee's login credentials. It does NOT delete any of their data or assignments.

Tip: You can also use the Lock User Account toggle on this tab to temporarily prevent someone from logging in without deleting their account.

Viewing an Employee's Training & Certifications

You can check any employee's training history, completion status, and certification records from their profile.

- Click Personnel in the left sidebar.
- Find the employee and click the arrow (→) next to their name.
- On their profile, click the Training tab.

Dashboard

Bulletins

Actions

Assigned Forms

Documents

Forms

Personnel

Toolbox Talks

Training

Analytics

Attachments

Assets

Notifications

Module Customization

Offices

Safety Events

...

Cory White
Global Admin

Instance
Plastic Recyclers Southeast Inc.

Go Back

All Users > Augusto Jose Andres

Augusto Jose Andres

EMPLOYEE

Active User

Overview

Item Tracker

Actions

Assigned Forms

Toolbox Talks

Related Forms

Training

Notes

Attachments

Related Attachments

Export

Actions	Course Name T4	Training Status T4	Enrollment T4	Assigned Date T4	Complete Date T4
→	Acceso a espacios confinados (Confined Space Entry)	OPEN	ACTIVE ASSIGNMENT	01/01/2025	
→	Comunicación de riesgos (Hazard Communication)	OPEN	ACTIVE ASSIGNMENT	01/01/2025	
→	El acceso a las historias clínicas (Access to Medical Records)	OPEN	ACTIVE ASSIGNMENT	01/01/2025	
→	El montacargas (El vehículo industrial motorizado) - (Powered Industrial Truck)	COMPLETE	ACTIVE ASSIGNMENT	08/21/2024	08/21/2024
→	Entrenamiento de bloqueo y etiquetado para empleados autorizados (Authorized LOTO)	OPEN	ACTIVE ASSIGNMENT	10/02/2025	10/02/2024
→	Entrenamiento sobre el candidato y etiqueta para empleados afectados (Affected Lockout Tagout)	OPEN	INACTIVE ASSIGNMENT	01/01/2025	
→	La conservación del oído (Hearing Conservation)	OPEN	ACTIVE ASSIGNMENT	01/01/2025	
→	La Protección Contra Caídas (Fall Protection Training)	OPEN	ACTIVE ASSIGNMENT	01/01/2025	
→	Respuesta a emergencias e incidentes (Spanish Emergency Response)	COMPLETE	ACTIVE ASSIGNMENT	09/18/2024	09/18/2024
→	Equipo de protección personal (EPP) - Personal Protective Equipment	OPEN	ACTIVE ASSIGNMENT	01/01/2025	

- The Training tab shows every course this employee has been assigned, with the following details:
 - Training Status — OPEN means not yet completed; COMPLETE means they finished the course.
 - Assigned Date, Due Date, Complete Date — important deadline and completion dates.
 - Enrollment — shows ACTIVE ASSIGNMENT for courses currently assigned.
- Click the arrow (→) next to any course to view the full certification record.
- Click Export (top-right of the Training tab) to download this employee's training report as a spreadsheet.

Training — Managing Courses and Assignments

The Training module lets you create and manage training courses for your employees. It has two main areas: Manage Training (the course list) and Course Videos (the video library, also called the LMS). Courses are identified by CRDF_XXXXXX codes in the system.

Actions	Name	Identifier T1	Created By T1	Active T1	Office T1
→	Acceso a espacios confinados (Confined Space Entry)	CRDF_000010	Mike Kamefsky	ACTIVE	Decatur
→	Acceso to Medical Records	CRDF_000023	Mike Kamefsky	ACTIVE	
→	Authorized Lockout Tagout - Menomonia	CRDF_000031	Mike Kamefsky	ACTIVE	Menomonia
→	Authorized Lockout, Tagout, Tryout - Decatur	CRDF_000016	Mike Kamefsky	ACTIVE	Decatur
→	Comunicación de riesgos (Hazard Communication)	CRDF_000019	Mike Kamefsky	ACTIVE	Decatur
→	Confined Space Entry	CRDF_000002	Rose Jones	ACTIVE	
→	El acceso a las historias clínicas (Access to Medical Records)	CRDF_000009	Mike Kamefsky	ACTIVE	
→	El montacargas (El vehículo industrial motorizado) - (Powered Industrial Truck)	CRDF_000013	Mike Kamefsky	ACTIVE	
→	El trabajo caliente y la prevención de incendios (Hot Work & Fire Prevention)	CRDF_000022	Mike Kamefsky	ACTIVE	
→	Emergency and Incident Response	CRDF_000008	Mike Kamefsky	ACTIVE	
→	Entrenamiento de bloque y etiquetado para empleados autorizados (Authorized LOTO)	CRDF_000010	Mike Kamefsky	ACTIVE	
→	Entrenamiento sobre el candado y etiqueta para empleados afectados (Affected Lockout Tagout)	CRDF_000015	Mike Kamefsky	ACTIVE	
→	Equipo de protección personal (EPP) - Personal Protective Equipment	CRDF_000021	Mike Kamefsky	ACTIVE	
→	Fall Protection	CRDF_000007	Mike Kamefsky	ACTIVE	
→	Gestión De Aguas Pluviales-Mejores Practicas de Gestion (MPG) - Stormwater Management-Best Management Practices	CRDF_000027	Mike Kamefsky	ACTIVE	
→	Global Recycling Standard (GRS) Overview Training	CRDF_000025	Mike Kamefsky	ACTIVE	
→	Hazard Communication	CRDF_000006	Mike Kamefsky	ACTIVE	
→	Hearing Conservation	CRDF_000003	Mike Kamefsky	ACTIVE	
→	Hot Work Training	CRDF_000004	Mike Kamefsky	ACTIVE	
→	La conservación del oído (Hearing Conversation)	CRDF_000011	Mike Kamefsky	ACTIVE	
→	La Protección Contra Caídas (Fall Protection Training)	CRDF_000012	Mike Kamefsky	ACTIVE	
→	La Protección de Maquinas (Machine Guarding)	CRDF_000024	Mike Kamefsky	ACTIVE	
→	Machine Guarding	CRDF_000017	Mike Kamefsky	ACTIVE	
→	Motor Vehicles Safe Driving Practices	CRDF_000033	Angie White	ACTIVE	
→	Pedestrian Forklift Safety	CRDF_000029	Josh Davies	ACTIVE	
→	Personal Protective Equipment	CRDF_000005	Mike Kamefsky	ACTIVE	
→	Powered Industrial Truck - Decatur	CRDF_000014	Mike Kamefsky	ACTIVE	Decatur
→	Powered Industrial Truck - Menomonia	CRDF_000032	Mike Kamefsky	ACTIVE	Menomonia
→	Respiratory Protection	CRDF_000028	Mike Kamefsky	ACTIVE	
→	Respuesta a emergencias e incidentes (Spanish Emergency Response)	CRDF_000020	Mike Kamefsky	ACTIVE	
→	Seguridad de Montacargas para Peatones (Pedestrian Forklift Safety)	CRDF_000030	Josh Davies	ACTIVE	
→	Storm Water Pollution Prevention Training	CRDF_000026	Mike Kamefsky	ACTIVE	

Navigating the Training Module

1. Click Training in the left sidebar.
2. You will see two tabs at the top of the page:
 - Manage Training — the list of all training courses. This is where you create, edit, and assign courses.
 - Course Videos — the LMS video library. Upload video-based training content here.
3. Click the arrow (→) next to any course to open it and see its details, content, and enrolled employees.

Tip: Use the search and filter options at the top of the Manage Training list to quickly find a course by name, status, or office.

Creating a Training Course

Use this workflow to build a new training course. Each course has a unique CRDF_XXXXXX code and contains settings, content (lessons/quizzes/demonstrations), and employee assignments — all managed through the Edit form.

1. Click Training in the left sidebar.

2. Click the yellow + Create button in the top-right corner.

The screenshot shows the PRSEI Training Management interface. On the left is a dark sidebar with a menu including Dashboard, Bulletins, Actions, Assigned Forms, Documents, Forms, Personnel, Toolbox Talks, Training (highlighted), and Analytics. Below the menu is a user profile for Cory White, Global Admin, and the instance name Plastic Recyclers Southeast Inc. The main content area is titled 'Training' and has three tabs: My Training, Manage Training (selected), and Course Videos. In the Manage Training tab, there is a table of training courses. A red arrow points to a yellow '+ Create' button located above the table. The table has columns for Actions, Name, Identifier, and Created By. It lists several training items with their identifiers and creators.

Actions	Name	Identifier	Created By
→	Acceso a espacios confinados (Confined Space Entry)	CRDF_000018	Mike Kenefsky
→	Access to Medical Records	CRDF_000023	Mike Kenefsky
→	Authorized Lockout Tagout - Menomnie	CRDF_000031	Mike Kenefsky
→	Authorized Lockout, Tagout, Tryout - Decatur	CRDF_000016	Mike Kenefsky
→	Comunicación de riesgos (Hazard Communication)	CRDF_000019	Mike Kenefsky
→	Confined Space Entry	CRDF_000002	Rose Jones
→	El acceso a las historias clínicas (Access to Medical Records)	CRDF_000009	Mike Kenefsky
→	El montacargas (El vehículo industrial motorizado) - (Powered Industrial Truck)	CRDF_000013	Mike Kenefsky
→	El trabajo caliente y la prevención de incendios (Hot Work & Fire Prevention)	CRDF_000022	Mike Kenefsky
→	Emergency and Incident Response	CRDF_000001	Mike Kenefsky

3. The Edit form opens. Fill in the General Settings:
 - Name * — a clear title employees will see (e.g., 'Forklift Safety Certification 2026').
 - Office — assign to a specific office, or leave blank to make it available instance-wide.
 - Default Language * — the language content will be shown in by default.
 - Active — toggle on to make the course visible and assignable to employees.
4. Under Course Assignments, click Choose selections to assign the course to specific employees, groups by manager, or groups by department. You can also do this after saving.
5. Set Completion Tracking: enter a number in Due in Days (e.g., 30 means employees have 30 days to complete it after assignment).
6. Scroll down to Contents to add your course material (see the next section for details).
7. Click Save. The course is now live and visible in the Training list.

Note: You can return to the course at any time and click Edit to add more content, adjust settings, or update assignments.

Adding Lessons, Quizzes, and Demonstrations to a Course

All course content — lessons, quizzes, and demonstrations — is added through the Contents section inside the course Edit form. Each piece of content is called a 'content item' and you choose its type when you create it.

Important: Do not look for separate Lessons, Quizzes, or Demonstrations tabs inside the course. All content is managed through the Contents section when you click Edit on the course.

1. Click Training in the left sidebar and find your course in the list.
2. Click on the course name to open it. You will see the course tabs at the top: Designer, Assign, Classrooms, Notifications, Quiz Results, and Audit.

← Go Back | Training > Authorized Lockout Tagout - Menomonie

Course Authorized Lockout Tagout - Menomonie Edit

ACTIVE

CRDF_000031

Designer Assign Classrooms Notifications Quiz Results Audit

General Settings

Name
A clear, descriptive name for the course that will be visible to trainees and in reports.
Authorized Lockout Tagout - Menomonie

Office
Assign this course to a specific office, or leave as instance-wide to make it available to all offices.
Menomonie

Default Language
The default language for this course. Content must exist for the default language. When a trainee starts the course, this language is pre-selected.
English

Active
When active, this course can be assigned to trainees and will appear in course lists. Deactivate a course to hide it from new assignments while preserving existing training records.
Yes

Course Dependencies

Completion Tracking Settings

3. Click the Edit button (yellow, top right) to open the course edit form.
4. Scroll down past the General Settings until you reach the Contents section.

Contents

Content Language
The default language is shown when no other match is available. Add languages to provide translated content.
English (Default) +

Authorized Lock...
Authorized Lock...
Authorized Lock...
Authorized Lock...

+ Add Content

Content Type
☒ Lesson ☐ Quiz ☐ Demonstration

↓ Move Down ↑ Move Up Preview Delete

Header *
Authorized Lockout Tagout - Generic

This field may be used for text based lesson content or specific video instructions.

Normal B I U | | A | | | | | | |

Content goes here...

5. Click the + Add Content button (yellow button on the left side of the Contents section).
6. A form panel opens on the right. Set the Content Type by clicking the radio button for the type you want to add:
 - Lesson — a video, reading, or PDF that employees must complete. Select a Video Provider (Internal, YouTube, or Vimeo) and choose or link the video.
 - Quiz — a set of questions to test employee knowledge. After adding a Quiz content item, manage the questions in the Quiz Results tab.
 - Demonstration — a hands-on task an employee must perform in person. A certifying trainer verifies completion.

7. Fill in the Header (required) — this is the title employees will see for this content item.
8. For a Lesson, also fill in the Time Limit (Minutes) and select the Video Provider and Video from your library.
9. Click Save at the bottom of the page. The new content item appears in the left panel list.
10. Repeat steps 5–8 for each lesson, quiz, or demonstration you want to add to the course.

i Tip: Content items appear to employees in the order they are listed. Use the Move Up and Move Down buttons to reorder them, and the Preview button to see how a lesson will look to the employee.

💡 Note: Before employees can be assigned to a course, the course must have Active set to Yes. Turn this on in the General Settings at the top of the Edit form.

Assigning Employees to a Training Course

Employees are assigned to a course through the Course Assignments field inside the course Edit form. You can assign individual employees, all employees in a department, or groups of employees by manager.

⚠ Important: There is no separate 'Assign Employees' button on the course page. To assign or remove employees, you must click Edit on the course and use the Course Assignments field.

1. Click Training in the left sidebar and find your course in the list.
2. Click on the course name to open it, then click the Edit button (yellow, top right).
3. In the Edit form, scroll down to the Course Assignments field — it is just below the Active toggle in the General Settings area.

PRSEI
Proactive Health Solutions

← Go Back | Training > Authorized Lockout Tagout - Menomonie > Edit

Course Authorized Lockout Tagout - Menomonie Save

ACTIVE

CRDF_000031

General Settings

Name *
A clear, descriptive name for the course that will be visible to trainees and in reports.

Authorized Lockout Tagout - Menomonie

Office
Assign this course to a specific office, or leave as instance-wide to make it available to all offices.

Menomonie

Default Language *
The default language for this course. Content must exist for the default language. When a trainee starts the course, this language is pre-selected.

English

☒ Active Yes
When active, this course can be assigned to trainees and will appear in course lists. Deactivate a course to hide it from new assignments while preserving existing training records.

Course Assignments
Use the Course Assignments field to assign the course to users, groups of users by manager, or groups of users by department. After saving, use the Assignments tab to view the full list of assignees.

Selected 1 selections.

Choose selections

4. Click Choose selections.
5. A selection panel opens. You can search and choose:
 - Individual employees by name.
 - Groups of employees by their manager (all direct reports of a supervisor).

- Groups of employees by their department.
 - Groups of employees by the “Group” assigned to them in the “Group” module.
6. Select all the employees or groups you want to assign and confirm your selections.
 7. Click Save at the bottom of the page.
 8. To verify the assignments, click the Assign tab at the top of the course page. You will see every assigned employee with their Training Status (Open, Complete, Pending).

Actions	Assignee	User Type	Vendor	User Status	Training Status	Assignment Type	Enrollment
...	Aljandro Juan	EMPLOYEE		ACTIVE	PENDING	FIRST TIME	ACTIVE ASSIGNMENT
...	Andres P Mendez	EMPLOYEE		ACTIVE	COMPLETE	RENEWAL	ACTIVE ASSIGNMENT
...	Angeline N. Garcia	EMPLOYEE		ACTIVE	PENDING	FIRST TIME	ACTIVE ASSIGNMENT
...	Augusto Jose Andres	EMPLOYEE		ACTIVE	PENDING	FIRST TIME	ACTIVE ASSIGNMENT
...	Benito Osorio-Diaz	EMPLOYEE		ACTIVE	COMPLETE	RENEWAL	ACTIVE ASSIGNMENT
...	Diego Miguel Tomas	EMPLOYEE		ACTIVE	COMPLETE	RENEWAL	ACTIVE ASSIGNMENT
...	Jimmy Soliz	EMPLOYEE		ACTIVE	PENDING	FIRST TIME	ACTIVE ASSIGNMENT
...	Jonathon Rodriguez	EMPLOYEE		ACTIVE	COMPLETE	RENEWAL	ACTIVE ASSIGNMENT
...	Jorge Moreno	EMPLOYEE		ACTIVE	COMPLETE	RENEWAL	ACTIVE ASSIGNMENT
...	Julia Oliva	EMPLOYEE		ACTIVE	COMPLETE	RENEWAL	ACTIVE ASSIGNMENT
...	Kanold Bernard	EMPLOYEE		ACTIVE	PENDING	FIRST TIME	ACTIVE ASSIGNMENT
...	Mario Said Bello	EMPLOYEE		ACTIVE	COMPLETE	RENEWAL	ACTIVE ASSIGNMENT
...	Matias Manuel	EMPLOYEE		ACTIVE	COMPLETE	RENEWAL	ACTIVE ASSIGNMENT
...	Miguel Mendez	EMPLOYEE		ACTIVE	PENDING	FIRST TIME	ACTIVE ASSIGNMENT
...	Rosalba Castillo	EMPLOYEE		ACTIVE	COMPLETE	RENEWAL	ACTIVE ASSIGNMENT
...	Sarah Boggs	EMPLOYEE		ACTIVE	COMPLETE	RENEWAL	ACTIVE ASSIGNMENT
...	Virginia Trejo Valerio	EMPLOYEE		ACTIVE	COMPLETE	RENEWAL	ACTIVE ASSIGNMENT

Note: Once assigned, each employee will see the course in their Training module under My Training with an OPEN status. They will receive a notification email if email alerts are configured for your instance.

Tip: To check who is assigned without making changes, use the Assign tab view — you can filter by supervisor, department, or training status.

Adding a Video to the LMS (Course Videos)

The Course Videos tab is the Learning Management System (LMS). Use it to upload video content that employees can watch as part of their training.

1. Click Training in the left sidebar.
2. Click the Course Videos tab.

Training

My Training Manage Training **Course Videos**

[+ Create](#)

Actions	Title	Description	Active
→	Access to Medical Records-Ger		ACTIVE
→	Access to Medical Records-Site		ACTIVE
→	Authorized Lockout Tagout Ger		ACTIVE
→	Authorized Lockout Tagout-Sib		ACTIVE
→	Confined Space Entry-Site Spei		ACTIVE
→	El trabajo caliente y la prevenci		ACTIVE
→	El trabajo caliente y la prevenci		ACTIVE
→	Emergency and Incident Respo		ACTIVE
→	Equipo de protección personal		ACTIVE
→	Es_Hazard Communication Ger		ACTIVE
→	Es_Hazard Communication Site		ACTIVE
→	Fall Protection Training-Site Sp		ACTIVE
→	Fall Protection-Generic		ACTIVE
→	Forklift Authorization Classroom		ACTIVE
→	Gestion De Aguas Pluviales-Me		ACTIVE
→	Global Recycling Standard (GR)		ACTIVE
→	Hazard Communication Trainin		ACTIVE
→	Hearing Conservation Training		ACTIVE
→	Hearing Conservation-Generic		ACTIVE
→	Hot Work Training Site Specific		ACTIVE

Rows per page: 20 1-20 of 44 [Problem? Click to Reset Table](#)

3. Click the yellow + Create Course Video button.

4. Fill in the required fields:

- Title * — the name of the video.
- Video File * — click to browse and upload your video file (maximum 300 MB).

5. Optionally add a Description to explain what the video covers.

6. Click Save. The video will appear in the Course Videos library.

i Tip: Course videos uploaded here can be linked to lessons inside a training course. After uploading, go to the course, open a Lesson, and select the video from the library.

Forms — Building and Assigning Forms

The Forms module (also called Form Builder) is where you create custom forms for your organization — things like incident reports, safety inspections, audits, and checklists. You can also embed forms inside other forms and assign forms directly to employees.

Creating a Form in Form Builder

Use this workflow to build a new form from scratch.

1. Click Forms in the left sidebar.
2. On the Manage Forms tab, click the yellow + Create Form button.

The screenshot shows the PRSEI Forms management interface. The left sidebar contains a navigation menu with items like Dashboard, Bulletins, Actions, Assigned Forms, Documents, Forms (highlighted), Personnel, Toolbox Talks, Training, Analytics, Attachments, and Assets. The main area is titled 'Forms' and has three tabs: 'My Forms', 'All Forms', and 'Manage Forms' (selected). A red arrow points to a yellow '+ Create' button in the top left of the 'Manage Forms' tab. Below the button is a table of existing forms with columns: Actions, Form Identifier, Name, Description, Active, and Subform. The table lists various forms such as 'A-AUDIT', 'AN-LOTO', 'DAYFORK', 'ENV-REP', 'FallHaz', 'FALLPPE', 'FORKDEM', 'FRM_INC', 'FRM-BMP', and 'FRM-IDR'. Each form has an 'ACTIVE' status and a 'NO' subform status.

Actions	Form Identifier	Name	Description	Active	Subform
→	A-AUDIT	Annual Compliance Audit		ACTIVE	NO
→	AN-LOTO	LOTO Procedure Annual Inspection Form		ACTIVE	NO
→	DAYFORK	Daily Forklift Inspection	Daily inspection for forklifts in	ACTIVE	NO
→	ENV-REP	Reporting of Releases into the Environment		ACTIVE	NO
→	FallHaz	Fall Hazard Analysis	Fall hazard assessment for falls	ACTIVE	NO
→	FALLPPE	Fall Protection PPE Inspection Form	Documented Inspection of Fall	ACTIVE	NO
→	FORKDEM	Forklift Demonstration Form	Demonstration form to be used	ACTIVE	NO
→	FRM_INC	Incident Investigation Form	Form for reporting close calls, i	ACTIVE	NO
→	FRM-BMP	Storm Water BMP Inspection	Weekly inspection for the BMP	ACTIVE	NO
→	FRM-IDR	Fall Protection Ladder Inspection	Inspection of ladders in the w	ACTIVE	NO

3. Fill in the form setup fields:
 - Office — select which office this form applies to (leave blank for all offices).
 - Unique Form ID * — enter exactly 7 characters (no spaces). This ID is used in reports and tracking (e.g., FRMSAFE, FRMINCD, FRMAUDT).
 - Form Name * — the internal name admins see.
 - Title — the name employees see when they open the form.
 - Description — explains the purpose of the form to employees.

Form Settings — New Form Title

Office
Assign this form to a specific office, or leave as instance-wide to make it available to all offices.
All Offices

Unique Form Identifier *
A unique, 7 character, identifier for this form. Used to generate a unique identifier for each form submission of this form. Cannot be edited once the form is created. Ex, FRMHLP
Enter unique form identifier 0 / 7

Form Name *
The name of the form in the system.
New Form Name 13 / 50

Title
The title shown on the form when being completed by a user.
New Form Title 14 / 50

Description
The description shown on the form when being completed by the user.
Enter description

BEHAVIOR

- ☒ **Form Is Active** Yes
If enabled, the form is accessible throughout the system and users may create submissions for it.
- ☐ **Form Is Failable** No
If enabled, the form can be failed by the user. A checkbox or switch field must be configured to allow the user to fail the form.
- ☐ **Allow Edits After Publish** No
If enabled, the original user that submitted the form and any other user that has access to the form submission may edit the form submission. Editing form submissions does not re-trigger workflows or compliance events. Editing form submissions may re-trigger notification rules.
- ☐ **Enable Anonymous Submission** No
If enabled, this form will not collect user information during form submission.
- ☐ **Enable Embedded Subform Only** No
If enabled, this form may only be used as a sub-form of another form. It will have limited accessibility throughout the system.
- ☒ **Enable Form Description Field** Yes
If enabled, this form will require the user to complete the form description field when submitting the form. This information is used for identification purposes in other parts of this website. If disabled, the field will not be shown.

INTEGRATIONS

- ☐ **Extension Tab Only** No
If enabled, this form is only accessible through module extension tabs. It will be hidden from user-facing form lists and submissions.

Note: The Unique Form ID must be exactly 7 characters. If the ID you want is already taken, try an abbreviation of the job title or department (e.g., FRMOPS1, FRMHR01). Job Title is not a required field — it is optional.

- Configure the Behavior toggles as needed (e.g., allow multiple submissions, require supervisor approval).
- Under Integrations, enable any applicable options such as automatically create a Safety Event from a form submission.
- In the builder, add sections and fields using the + Add Field or Add Section buttons. Available field types include text, dropdown, date, checkbox, signature, sub-form, and more.

Fields

+ Add Field

New Field
Text

Field Settings

Field Type *
Text

Field Label *
New Field 9 / 1,024

Field Short Label
If provided, short labels are used in reporting in place of longer labels.
Enter field short label 0 / 30

Field Identifier
Field identifiers are used in notification rules and workflows to allow the field to be selected as a module variable. If not provided, the field will not be available for selection. Identifiers may only contain letters, numbers, and the symbol ".". Example: 'EVENT_NAME'.
Enter field identifier 0 / 30

Validation Type

Preview

New Form Title
[Form ID]

Form Description *
Enter a short, one-sentence description (100 characters maximum) of your submission. This is used to help identify your submission at a later date.
Enter form description 0 / 100

New Field *
Enter new field

- Click Publish when the form is ready for employees to use.

Assigning a Form to an Employee

After creating and publishing a form, you can assign it to specific employees or groups. Assigned forms appear in the employee's Assigned Forms module for them to complete.

1. Click Forms in the left sidebar.
2. On the Manage Forms list, find the form you want to assign. Click the arrow (→) next to it to open the form details.
3. Look for the Assign or Assign Form button (usually in the top-right area of the form detail page).

← Go Back | Manage Assigned Forms → Create

New Assigned Form Assignment

Office
Assign this form to a specific office, or leave as instance-wide to make it available to all offices.
All Offices

Will Assign To *
Choose users to assign this item to. If assigning by manager, department, or group, then the users belonging to them are assigned the item.
No selections found
Choose selections

Form *
Choose a form to assign. The user must complete and publish the form through their Assigned Forms module. Directly submitting the form will not mark this item as completed.
Select form

Approval Flow Type *
If Standard is selected, the task is marked as completed when the user action is taken. If Approval Required is selected, the task will not be completed until approved by an administrator in the Task Assigner also be rejected and returned to the user for rework.
Standard

Due In Days
The number of days until the item is due. The due date is calculated when the item is published and assigned to end users. For example, enter 5 to have your due date be 5 calendar days from today, if you today.
Enter due in days

Preview
Calculated preview field based on the Days When Due field. Using the Days When Due and the current day, preview the possible Due Date of this item. Due Date is not calculated until the item is assigned

Completion Type *
If Standard is selected, all assigned employees must complete the task. If Assign to Many for One is selected, the task will be completed for all assigned employees whenever one employee completes it.
Standard

Auto Assignment No
If enabled, this item will be kept open and have its assignments automatically refreshed to include new members of any assigned supervisor, department, or group. It must be manually closed to stop assignment process.

Related Asset
Choose an asset to relate to this item. Choosing an asset will link this item to that asset and cause it to appear on that asset profile.
Selected: None
Choose Asset

Compliance Standards
Choose one or more compliance standards to relate to this item. Choosing compliance standards will link this item to those standards and cause it to appear on those standards reporting profiles.
No selections found
Choose selections

Save Save & Issue to personnel

4. In the assignment panel, fill in:
 - Assign To (Employee) — search for and select the employee who should receive this form.
 - OR — Assign To (Group) — if assigning to a whole group, select the group instead.
 - Due Date — when the form must be submitted.
 - Approval Flow — choose Standard (submit and done) or Approval Required (supervisor reviews submission).
5. Toggle Notify employee by email to ON so the employee gets an email alert.
6. Click Assign Form. The form will appear in the employee's Assigned Forms module with OPEN status.

i Tip: You can also assign forms to employees in bulk by selecting multiple employees from the Groups module.

Embedding a Sub-Form into a Form

ProactEHS allows you to embed an existing form as a section inside another form. This is useful for reusable components like employee signature blocks or standard checklists.

1. Click Forms in the left sidebar.
2. Click the arrow (→) next to the form you want to add a sub-form to.
3. In the Form Builder canvas, navigate to the section where you want to embed the sub-form.
4. Click + Add Field, then choose Sub-Form or Embedded Form from the field type list.
5. In the field configuration panel, select the form you want to embed from the Form Definition dropdown.

The screenshot displays the ProactEHS Form Builder interface. On the left is a dark sidebar with navigation icons for Dashboard, Bulletins, Actions, Assigned Forms, Documents, Forms (highlighted), Personnel, Toolbox Talks, Training, Analytics, Attachments, Assets, Notifications, and Module Customization. The main area is divided into three panels: 'Fields', 'Field Settings', and 'Preview'. The 'Fields' panel shows a '+ Add Field' button and a 'New Field' entry with a dropdown arrow. The 'Field Settings' panel is active, showing configuration options for a 'Subform' field type. It includes fields for 'Field Label' (set to 'New Field') and 'Field Short Label' (with a note that short labels are used in reporting). A dropdown menu for 'Form Definition' is open, listing various forms such as 'Annual Compliance Audit', 'Daily Forklift Inspection', 'Fall Hazard Analysis', 'Fall Protection Ladder Inspection', 'Fall Protection PPE Inspection Form', 'Forklift Demonstration Form', and 'Worker Compensation Report'. A red arrow points to the 'Select sub form' option at the bottom of this list. The 'Preview' panel on the right shows a form titled 'New Form Title' with a description field and a large placeholder area labeled 'Subform Placeholder for 'New Field''.

6. Click Save to apply the change.

Linking a Form to Safety Events (Auto-Create on Submit)

You can configure a form so that when an employee submits it, a Safety Event record is automatically created in ProactEHS. This is ideal for incident investigation forms — when someone submits the form, the system creates the Safety Event without any extra steps.

1. Click Forms in the left sidebar. Find your form and click the arrow (→) to open it.
2. In the form settings, click the Integrations tab.

3. Find the Safety Events Integration option. Toggle it to ON.
4. Once enabled, map the form fields to the Safety Event fields (e.g., 'Incident Description' field → Safety Event Description).
5. Click Save Settings.
6. From now on, every time an employee submits this form, a linked Safety Event will be automatically created. Typically this is for an incident investigation, property damage, or vehicle incident form

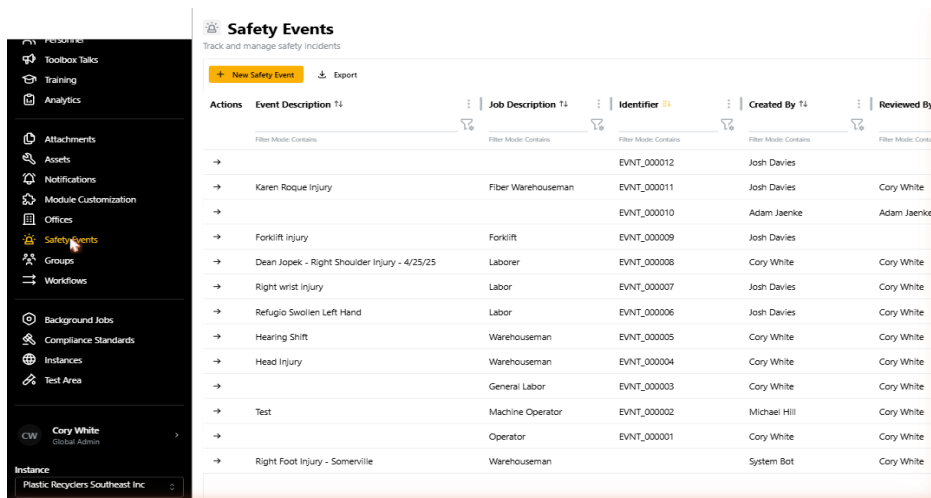
Note: The Safety Event created will be linked to the form submission, so you can navigate between them easily. The Safety Event will appear in the Safety Events module with the form submission details pre-filled.

Safety Events — Recording Incidents

The Safety Events module is where you record workplace incidents, near-misses, injuries, and OSHA-recordable events. Each Safety Event gets a unique ID in the format EVNT_XXXXXX. Note: This module may not be available in all ProactEHS instances — contact your administrator if you don't see it.

Creating a Safety Event

1. Click Safety Events in the left sidebar.
2. Click the yellow + New Safety Event button.



Actions	Event Description ¹⁴	Job Description ¹⁴	Identifier ¹⁴	Created By ¹⁴	Reviewed By ¹⁴
→			EVNT_000012	Josh Davies	
→	Karen Roque Injury	Fiber Warehouseman	EVNT_000011	Josh Davies	Cory White
→			EVNT_000010	Adam Jaenke	Adam Jaenke
→	Forklift injury	Forklift	EVNT_000009	Josh Davies	
→	Dean Jopek - Right Shoulder Injury - 4/25/25	Laborer	EVNT_000008	Cory White	Cory White
→	Right wrist injury	Labor	EVNT_000007	Josh Davies	Cory White
→	Refugio Swollen Left Hand	Labor	EVNT_000006	Josh Davies	Cory White
→	Hearing Shift	Warehouseman	EVNT_000005	Cory White	Cory White
→	Head Injury	Warehouseman	EVNT_000004	Cory White	Cory White
→		General Labor	EVNT_000003	Cory White	Cory White
→	Test	Machine Operator	EVNT_000002	Michael Hill	Cory White
→		Operator	EVNT_000001	Cory White	Cory White
→	Right Foot Injury - Somerville	Warehouseman		System Bot	Cory White

3. Complete the required fields in the form header:
 - Form Description * — a brief summary of what happened (max 100 characters).
 - Incident At * — select the location where the incident occurred.
 - Time Period *, Time *, Shift * — when the incident occurred.
 - Job Description * — describe what task was being performed (max 500 characters).
 - User Type *, Event Person *, Location * — who was involved and where.
4. In the Safety section, fill in: Event Type, Injury Type, Body Part, Body Side, and Safety Type.

5. In the OSHA section, toggle Recordable if this event qualifies as OSHA-recordable, and fill in any relevant details (Gender, Insurance, etc.).

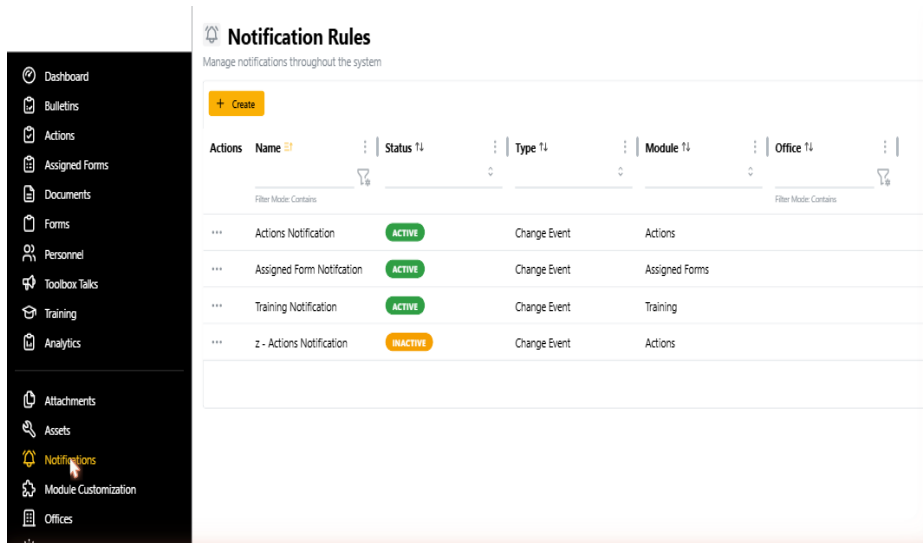
The screenshot shows the PRSEI Safety Events form. On the left is a dark sidebar with a menu containing: Analytics, Attachments, Assets, Notifications, Module Customization, Offices, Safety Events (highlighted), Groups, Workflows, Background Jobs, Compliance Standards, Instances, and Test Area. Below the menu is a user profile for Cory White, Global Admin. The main content area on the right has a light blue header with the PRSEI logo. Below the header, the form fields are organized into sections: Location (Decatur), Related Asset (N/A), Safety (Event Type: Sprain/Strain, Injury Type: Sprain/Strain, Body Part, Body Side, Front/Back, Safety Type: Injuries - 1), OSHA (Recordable: No, Gender: Female), Insurance Claim Text, Financial Cost, and Injury Type (Injury). At the bottom, there is an Instance dropdown menu showing 'Plastic Recyclers Southeast Inc'.

6. Click Save as Draft to save without finalizing, or Publish to make the event official. Published events show a PUBLISHED badge. If you want to be able to continue to update the incident, keep it in Draft mode.

i Tip: If your organization uses a Form Builder incident investigation form linked to Safety Events, a Safety Event may be automatically created when the form is submitted. See the 'Linking a Form to Safety Events' section under Forms for details.

Notifications — Setting Up Automated Alerts

Notification rules automatically send email alerts to employees when specific things happen in ProactEHS — such as when an action goes overdue, a training is due soon, or a form is submitted. There are two types of notifications: Change Events (triggered by something changing) and Reminders (triggered by a schedule).



Creating a Notification Rule

1. Click Notifications in the left sidebar.
2. Click the yellow + Create Notification Rule button.
3. Give the rule a Name * — use a descriptive name so you can identify it later (e.g., 'Overdue Action Alert — All Users').

Choosing the Notification Type

The Type field determines WHEN the notification fires. Choose carefully:

Office: All Offices

Notification Type
Choose how this notification is triggered.

Reminder
Send reminders once per day based on date conditions like due dates and expirations.

Change Event
Send notifications as changes occur in the system, like status updates or record modifications.

Target Module
The module determines which conditions and variables are available.

Actions
Monitor action assignments and due dates

Approvals
Monitor approval assignments and due dates

Assigned Forms
Monitor assigned form due dates

Attachments
Monitor attachment expiration dates

Forms
Monitor form status durations

Toolbox Talks
Monitor toolbox talk due dates

Training
Monitor training due dates and expirations

Notification Targets
Choose who receives this notification.

- **Change Event** — fires when something **CHANGES** in the system. Examples: an action becomes overdue, a form status changes, an employee's record is updated. After selecting Change Event, you will see a 'Change Event Type' dropdown — select what kind of change triggers this rule (e.g., Overdue, Status Changed, New Assignment).
- **Reminder** — fires on a **SCHEDULE** relative to a date. Examples: send a reminder 3 days before a training is due, or 1 day after an action is overdue. After selecting Reminder, you will see fields for how many days before/after the due date to send the alert.

Note: Change Event = reacts to something happening. Reminder = sends alerts based on upcoming or past dates. When in doubt: if you want to warn employees **BEFORE** a deadline, use Reminder. If you want to notify when something is already late or changed, use Change Event.

4. Select the Target Module — which module this rule watches (Actions, Training, Assigned Forms, Toolbox Talks, etc.).

Office: All Offices

Notification Type
Choose how this notification is triggered.

Reminder
Send reminders once per day based on date conditions like due dates and expirations.

Change Event
Send notifications as changes occur in the system, like status updates or record modifications.

Target Module
The module determines which conditions and variables are available.

Actions
Monitor action assignments and due dates

Approvals
Monitor approval assignments and due dates

Assigned Forms
Monitor assigned form due dates

Attachments
Monitor attachment expiration dates

Forms
Monitor form status durations

Toolbox Talks
Monitor toolbox talk due dates

Training
Monitor training due dates and expirations

Notification Targets
Choose who receives this notification.

5. Select Notify Who — who should receive the alert (Assigned User, Supervisor, Group, or specific person).
6. Optionally select an Office to limit this rule to a specific location.
7. Toggle Active to ON to enable the rule.
8. Click Save.

i Tip: You can create multiple notification rules for the same module. For example, set a Reminder 7 days before training is due AND a Change Event for when training becomes overdue.

Actions — Creating and Managing Tasks

Actions are tasks or corrective items you can assign to employees. Think of them as work orders or to-do items that employees must complete and acknowledge (or get approved).

Creating an Action

1. Click Actions in the left sidebar.
2. On the Manage Actions page, click the yellow + Create Action button.

The screenshot displays the Proactehs Actions management interface. On the left is a dark sidebar with navigation icons and labels: Dashboard, Bulletins, Actions (highlighted), Assigned Forms, Documents, Forms, Personnel, Toolbox Talks, Training, and Analytics. Below these are sections for Attachments, Assets, Notifications, Module Customization, Offices, and Safety Events. At the bottom of the sidebar, the user 'Cory White' (Global Admin) and the instance 'Plastic Recyclers Southeast Inc' are shown.

The main content area is titled 'Actions' and has two tabs: 'My Actions' and 'Manage Actions'. The 'Manage Actions' tab is active. It features a '+ Create' button, a 'Created By Me' checkbox, and a 'Search Assigned To' dropdown. Below this is a table with columns: Actions, Subject, Identifier, Created By, Created Date, Due Date, and Status. A single action is listed: 'Perform a Drill at the Location' with Identifier 'ACTS_000124', Created By 'System Bot', Created Date '04/01/2026', Due Date '05/01/2026', and Status 'PUBLISHED'. The table has filter modes for each column. At the bottom right, it shows 'Rows per page' set to 20 and '1-1 of 1'. A small red arrow points to the 'Perform a Drill at the Location' action.

3. Fill in the required fields:

- Will Assign To * — select the employee or group who should receive this action.
- Subject * — a clear description of what needs to be done (up to 500 characters).
- Approval Flow Type * — choose Standard (action is complete when the employee acknowledges it) or Approval Required (a supervisor must approve before it counts as complete).

◀ Go Back | Manage Actions | ▶ Create Action

New Action

Action required! This item will not be visible to the assigned users until it has been issued. The item cannot be edited until it is issued. When ready, use the "Issue to personnel" button in the top right corner.

Will Assign To *
No selections found
[Choose selections](#)

Subject *
The subject appears in lists and at the top of the item view for this and your. Use the subject to briefly describe the item.
Enter subject
0 / 100

Approval Flow Type *
If Standard is selected, the task is completed when the user action is taken. If Approval Required is selected, the task will not be completed until approved by an administrator in the Task Assignment page. The task may also be required and then used to the user for review.
Standard

Due Date
[Date Picker]

Content *
The content field represents the "body" of the item. Use the content field to write rich text, insert images or links. The content is always shown to the user when they view an item.
Normal
Content goes here...

Completion Type *
If Standard is selected, all assigned employees must complete the task. If Assign to Many for One is selected, the task will be completed for all assigned employees whenever one employee completes it.
Standard

☐ Auto Assignment: **No**
If enabled, this item will be kept open and have its assignments automatically reflected to include new members of any assigned supervisor, department, or group. It must be manually closed to stop the sub-assignment process.

Related Asset
Choose an asset to relate to this item. Choosing an asset will link this item to that asset and cause it to appear on that asset profile.
[Choose Asset](#)

Compliance Standards
No selection found. No compliance standards to relate to this item. Choosing compliance standards will link this item to those standards and cause it to appear on those standards reporting profiles.
[Choose selections](#)

Inline Attachments
Click to view files uploaded your files below to make them available to the assignees.

Drag files here or click to select files

- Attach multiple files
- Files should not exceed 10 MB
- Common file types accepted (images, documents, spreadsheets)

No files uploaded

[Save](#) [Save & Issue to personnel](#)

- Optionally set a Due Date and add detailed instructions in the Content editor.
- Click Save. The action will be assigned immediately and the employee will see it in their Actions list.

Note: The employee will receive an email notification when an action is assigned to them if email notifications are enabled for your instance.

Toolbox Talks — Safety Briefings

Toolbox Talks are short safety briefings assigned to employees. They can include rich text content and require employees to acknowledge that they have read and understood the material.

Creating a Toolbox Talk

1. Click Toolbox Talks in the left sidebar.
2. Click the yellow + Create button.

The screenshot displays the 'Toolbox Talks' management interface. On the left is a dark sidebar with navigation icons and labels. The main content area has a header with 'Toolbox Talks' and tabs for 'My Toolbox Talks', 'Supervisor Approvals', and 'Manage Toolbox Talks'. Below the header is a table with columns: Actions, Subject, Identifier, Created By, Created Date, Due Date, Status, and Office. The table contains five rows of data. The first row is 'Welcome' with identifier 'TOOL-018333', created by 'Cory White', due on '04/08/2022', and status 'COMPLETED'. The second row is 'Dry Ice Blasting Safely at PRSEI' with identifier 'D', created by 'Cory White', due on '02/06/2023', and status 'DRAFT'. The third row is 'D' with identifier 'D', created by 'Cory White', due on '02/06/2023', and status 'DRAFT'. The fourth row is 'Dry Ice Blasting at PRSEI' with identifier 'D', created by 'Cory White', due on '02/06/2023', and status 'DRAFT'. The fifth row is 'Dry Ice Blasting Safely at PRSEI' with identifier 'TBOX_000004', created by 'Cory White', due on '02/06/2023', and status 'COMPLETED'. At the bottom right of the table, there is a 'Rows per page' dropdown set to '20' and a '1-5 of 5' indicator.

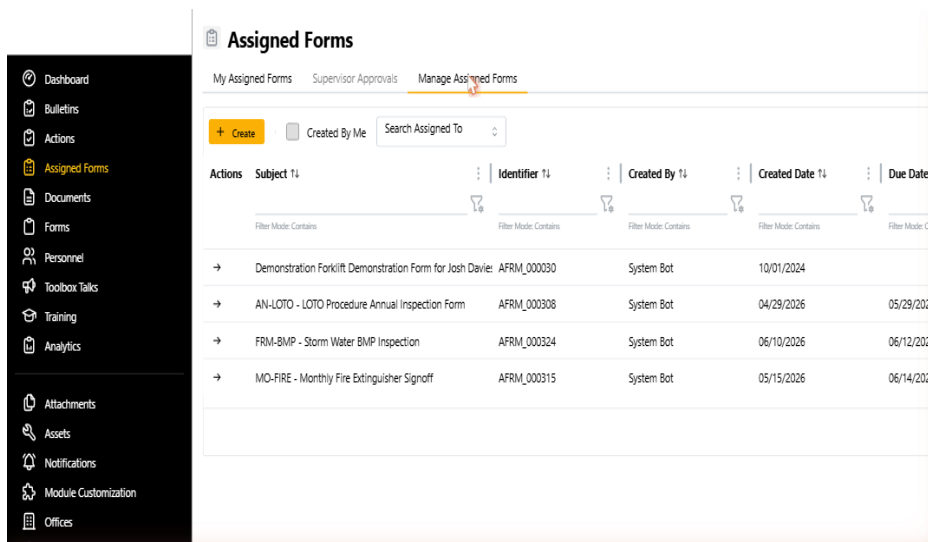
3. Fill in the required fields:
 - Will Assign To * — select the employee(s) or group(s) to receive this talk.
 - Subject * — the title of the toolbox talk.
 - Approval Flow Type * — Standard (employee acknowledges and it's done) or Approval Required.
 - Set Due In Days — the number of days employees have to complete the talk (e.g., 7).
 - Content – Put text, a picture, or video here (many people will create something in Canva or Adobe and download it as a picture and then upload it into the content section).
4. Optionally select an Office and add the briefing content in the rich text editor.
5. Click Save. The toolbox talk will be assigned and appear in the assignee's open items.

Assigned Forms — Monitoring Form Submissions

The Assigned Forms module is your admin view of all form submissions across the organization. You can see what has been submitted, what is still open, and approve pending submissions.

Viewing All Form Submissions (Admin View)

1. Click Assigned Forms in the left sidebar.
2. The page has three tabs — click the one you need:
 - My Assigned Forms — forms assigned directly to you (your own tasks).
 - Supervisor Approvals — forms submitted by your direct reports that are waiting for your approval.
 - Manage Assigned Forms — the full admin view of ALL form submissions across all users.

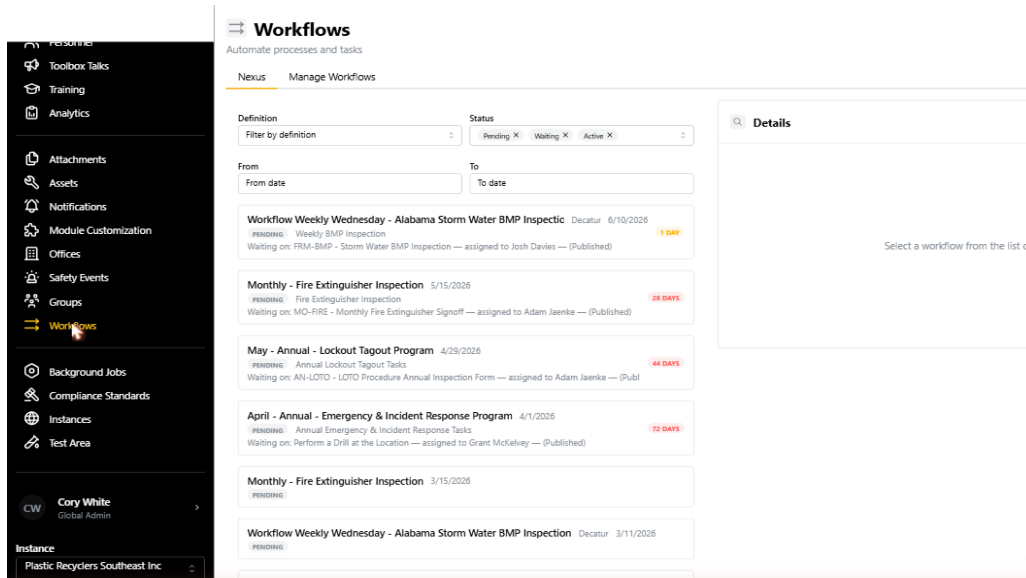


3. Click the Manage Assigned Forms tab to see the full organization-wide view.
4. Use the filter options (Office, Form Name, Status) to narrow down the results.
5. Click the arrow (→) next to any record to view the full form submission.

i Tip: The Manage Assigned Forms tab is the most important tab for admins. Use it to monitor compliance, check who hasn't submitted required forms, and review submissions.

Workflows — Setting Up Automations

Workflows define multi-step approval processes.



Creating a Workflow

1. Click Workflows in the left sidebar.
2. The page shows all existing workflows with their status: DRAFT, ASSEMBLE, PUBLISHED, or COMPLETED.
3. Click + New Workflow to create a new workflow.
4. Enter a Workflow Name (e.g., 'Incident Approval — Two Step') and select the Type (Actions, Forms, Toolbox Talks, etc.).

A screenshot of the 'New Workflow' creation form in the PRSEI system. The left sidebar shows the 'Workflows' menu item. The form has a 'Name' field with a red error message 'Workflow name is required.' Below this is an 'Office' dropdown menu set to 'All Offices' and an 'Active' toggle switch. The 'Triggers' section states 'Each trigger defines a way for this workflow to be initiated — by an event in the system or on a recurring schedule.' and includes a button '+ Add First Trigger'. The 'Phases' section states 'Phases are groups of actions executed in sequential order. Each phase must complete before the next one begins.' and includes a button '+ Add First Phase'. The bottom of the sidebar shows the user 'Cory White' and the instance 'Plastic Recyclers Southeast Inc'.

- Click + Add First Trigger to add the first approval step. This could be on a scheduled frequency, form submission, task completion or specific to training. Based on that trigger, the Phase listed below will happen.
- Click + Add Phase and then give it a title. After that add Actions you want to happen when that phase is triggered.

Phases
Phases are groups of actions executed in sequential order. Each phase must complete before the next one begins.

▼ 1 Phase 1: New Phase

Phase Name *
New Phase

Phase Slug
Optional identifier for referencing this phase's output variables (e.g., MGR_REVIEW). Uppercase letters, digits, and underscores only.
e.g. MGR_REVIEW

☐ Mutually Exclusive Completion
If enabled, completing any action in this phase will automatically complete the entire phase. Otherwise, all actions must be completed.

▼ 1 Send Email

Action Type

Send Email
Send a notification email to selected recipients.

Create Task
Create an action, approval, toolbox talk, or form task assigned to targeted users.

Extend Badge Expiration
Extend a contractor's badge expiration date by a specified number of days.

Configuration

Notification Targets
Choose who to send this notification to. Configure targets by user groups, data attributes, or individual users.

Send To

- This can be an email, task creation or used to extend a badge expiration.
- If you choose "Create Task" you can automatically assigned an Action, Toolbox Talk, or Form to an individual, group, manager group, or department.

Create Task
Create an action, approval, toolbox talk, or form task assigned to targeted users.

Configuration

Task Type

Action
Create a standard action task for the assigned user.

Form
Create a form submission task for the assigned user.

Toolbox Talk
Create a toolbox talk for a group safety discussion.

Targeting

Assign by Target Attributes

Task Details

Will Assign To *
Choose users to assign this item to. If assigning by manager, department, or group, then the users belonging to them are assigned the item.
No selections found
Choose selections

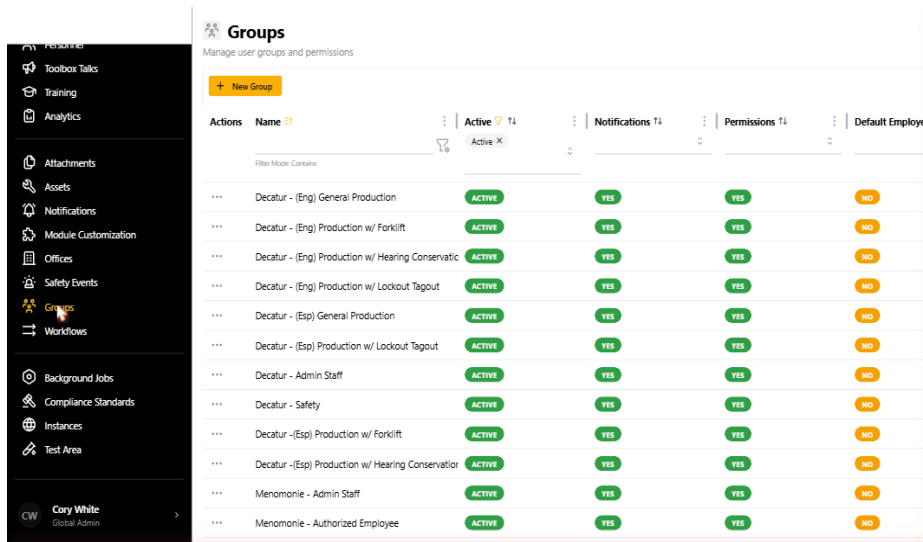
Will Assign To is required

Subject *
Variables can be used to add dynamic data to this field. Refer to the variables lists for more information.

- Click Save when you have your workflow set up. The workflow status will change to PUBLISHED and it will be available to select when creating items.

Groups — Managing Teams

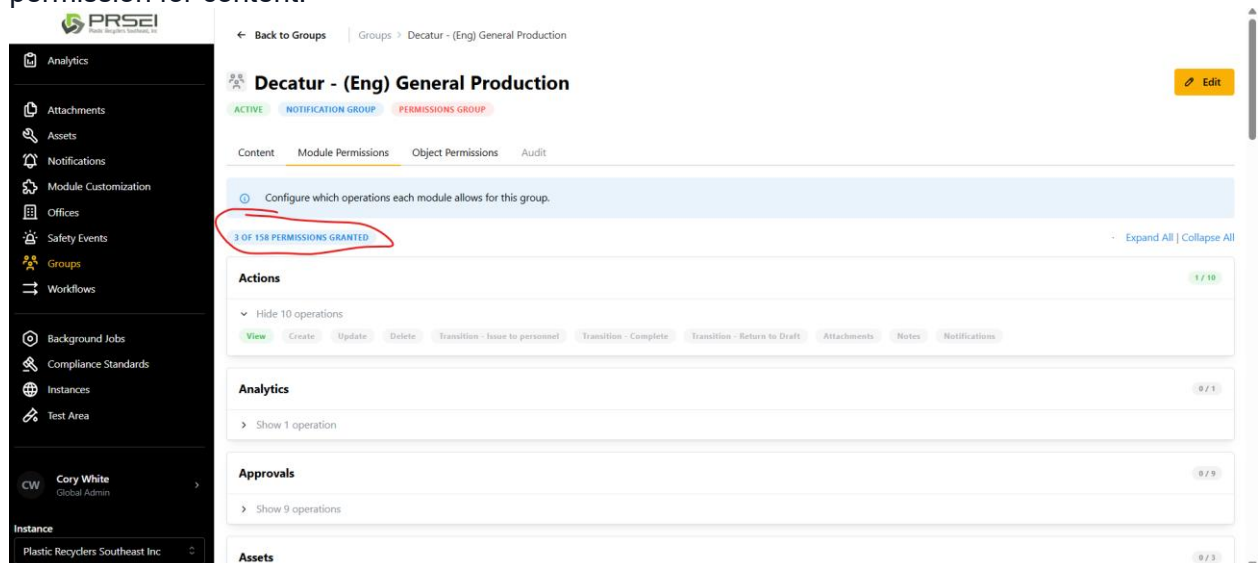
Groups let you manage sets of users together. Instead of assigning training, actions, or notifications to individual employees one at a time, you can assign them to a group and everyone in the group receives it automatically.



Actions	Name	Active	Notifications	Permissions	Default Employee
...	Decatur - (Eng) General Production	ACTIVE	YES	YES	NO
...	Decatur - (Eng) Production w/ Forklift	ACTIVE	YES	YES	NO
...	Decatur - (Eng) Production w/ Hearing Conservativ	ACTIVE	YES	YES	NO
...	Decatur - (Eng) Production w/ Lockout Tagout	ACTIVE	YES	YES	NO
...	Decatur - (Esp) General Production	ACTIVE	YES	YES	NO
...	Decatur - (Esp) Production w/ Lockout Tagout	ACTIVE	YES	YES	NO
...	Decatur - Admin Staff	ACTIVE	YES	YES	NO
...	Decatur - Safety	ACTIVE	YES	YES	NO
...	Decatur - (Esp) Production w/ Forklift	ACTIVE	YES	YES	NO
...	Decatur - (Esp) Production w/ Hearing Conservatio	ACTIVE	YES	YES	NO
...	Menomonic - Admin Staff	ACTIVE	YES	YES	NO
...	Menomonic - Authorized Employee	ACTIVE	YES	YES	NO

Creating a Group

1. Click Groups in the left sidebar.
2. Click + New Group.
3. Enter a Group Name (e.g., 'Warehouse Team') and an optional Description.
4. Use the Permissions tab to define what modules and actions group members can access. Note that all employees need to be assigned a group since this is how they get the proper permission for content.



PRSEI

Back to Groups | Groups > Decatur - (Eng) General Production

Decatur - (Eng) General Production Edit

ACTIVE NOTIFICATION GROUP PERMISSIONS GROUP

Content Module Permissions Object Permissions Audit

Configure which operations each module allows for this group.

1 OF 158 PERMISSIONS GRANTED Expand All | Collapse All

Actions 1 / 10

Hide 10 operations

View Create Update Delete Transition - Issue to personnel Transition - Complete Transition - Return to Draft Attachments Notes Notifications

Analytics 0 / 1

Show 1 operation

Approvals 0 / 5

Show 9 operations

Assets 0 / 3

5. Use the Object Permission tab to add permissions for analytics and forms that apply to all group members.

The screenshot displays the PRSEI system interface for configuring permissions for the 'Decatur - (Eng) General Production' group. The left sidebar contains navigation options: Analytics, Attachments, Assets, Notifications, Module Customization, Offices, Safety Events, Groups, Workflows, Background Jobs, Compliance Standards, Instances, and Test Area. The main content area shows the 'Object Permissions' tab selected. A message states: 'Configure access to specific objects (e.g., individual forms or dashboards) within each module. Granting access here allows group members to see the specific object. Module-level View permissions override object permissions.' Below this, it indicates '3 OF 23 OBJECTS GRANTED'. The 'Analytics' section shows 3 objects granted (0/3), with a red circle highlighting the section. The 'Forms' section shows 20 objects granted (3/20), with a red circle highlighting the section. The 'Forms' section lists various forms such as 'Annual Compliance Audit', 'Daily Forklift Inspection', 'Fall Hazard Analysis', 'Fall Protection Ladder Inspection', 'Fall Protection PPE Inspection Form', 'Forklift Demonstration Form', 'Hearing Conservation Program Evaluation', 'Hot Work Permit', 'Incident Investigation Form', 'Lockout Tagout Employee Authorization', 'LOTO Procedure Annual Inspection Form', 'Machine Guarding Assessment', 'Monthly Fire Extinguisher Signoff', 'Noise Survey', 'Personal Protective Equipment Hazard Assessment', 'Reporting of Releases into the Environment', 'Respiratory Fit Test', 'Safety Walkthrough Checklist', 'Storm Water BMP Inspection', and 'Waste Determination Form'.

6. Use the Default Employees and Default Contractors tabs to automatically add new employees entered into the system a group.
7. Click Save.

i Tip: When you assign an action, training, or form to a group, every member of that group receives the assignment. This is much faster than assigning to people one at a time.

Item Tracker — Managing PPE and Equipment

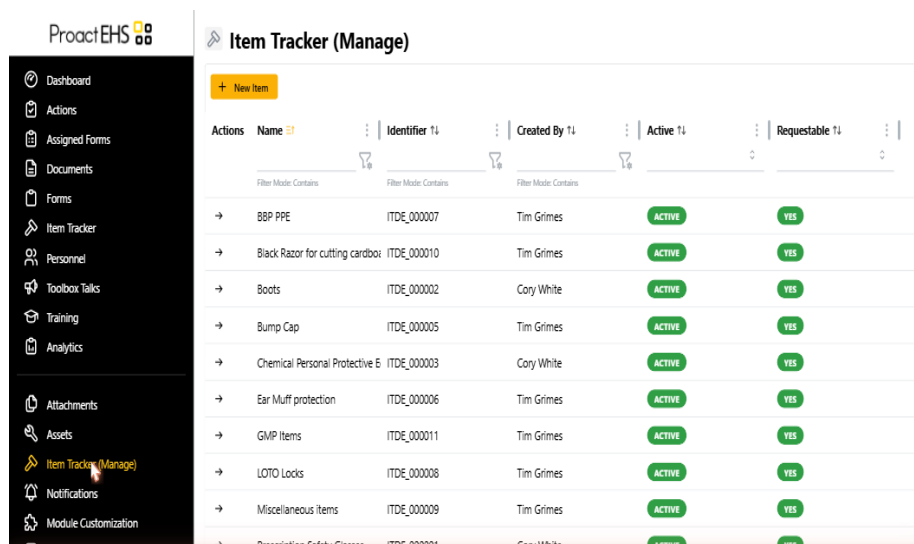
The Item Tracker module lets you define trackable items — such as PPE, tools, or equipment — and assign them to employees. Employees can see their assigned items and request new ones from their own Item Tracker dashboard. Note: Item Tracker is an instance-specific module and may not be enabled for all ProactEHS instances.

As an admin, your workflow has two parts: (1) setting up the item definitions in Item Tracker (Manage), and (2) assigning items to employees from their personnel profile.

Setting Up Item Definitions (Item Tracker Manage)

Before you can assign items to employees, you need to create the item definitions. This is done in the Item Tracker (Manage) section, which is in the lower admin area of the sidebar.

1. Scroll down in the left sidebar to the admin section and click Item Tracker (Manage).



Actions	Name	Identifier	Created By	Active	Requestable
→	BSP PPE	ITDE_000007	Tim Grimes	ACTIVE	YES
→	Black Razor for cutting cardboi	ITDE_000010	Tim Grimes	ACTIVE	YES
→	Boots	ITDE_000002	Cory White	ACTIVE	YES
→	Bump Cap	ITDE_000005	Tim Grimes	ACTIVE	YES
→	Chemical Personal Protective E	ITDE_000003	Cory White	ACTIVE	YES
→	Ear Muff protection	ITDE_000006	Tim Grimes	ACTIVE	YES
→	GMP Items	ITDE_000011	Tim Grimes	ACTIVE	YES
→	LOTO Locks	ITDE_000008	Tim Grimes	ACTIVE	YES
→	Miscellaneous Items	ITDE_000009	Tim Grimes	ACTIVE	YES
→	Discretionary Safety Glasses	ITDE_000001	Cory White	ACTIVE	YES

2. The Item Tracker (Manage) page shows all existing item definitions. Each item has a unique ITDE_XXXXXX identifier, an Active status, and a Requestable flag.
3. Click the yellow + New Item button to create a new item definition.

ProactEHS

← Go Back Item Definitions > New Item

New Item

Content Attachments Audit

☒ Active **Yes**
Do you want this item to be active? Inactive items are hidden from the user item tracker dashboard.

Name *
Enter name

Description *

Renews in Days
If this item needs to be renewed, enter the number of days it should be renewed in. When that many days have passed, the item will expire and the administrator will be notified to renew it. The assignee is not notified.
Enter renews in days

☒ Requestable by Employees **Yes**
If enabled, users may request this item through the user item tracker dashboard. If disabled, this item may only be assigned directly by Administrators.

4. Fill in the item details:

- Item Name * — a clear name for the item (e.g., 'Safety Glasses', 'LOTO Locks', 'Hi-Vis Vest').
- Description — explain the item, including any specifications employees should note (e.g., 'ANSI Z87.1 rated safety glasses. Please provide color and size when requesting.').
- Renewals in Days — if this item needs to be periodically renewed or replaced, enter the number of days. When that many days pass after assignment, you (the admin) will be notified to renew it. Leave blank if the item does not expire.
- Requestable by Employees — toggle ON if employees should be able to request this item themselves from their Item Tracker dashboard. Toggle OFF if only admins can assign it.
- Active — toggle ON to make the item visible and available. Inactive items are hidden from all dashboards.

5. Click Save Item. The item will be added to the list with a new ITDE_XXXXXX identifier and is ready to assign.

Note: Items with Requestable = Yes will appear in the employee's '+ Request Items' list on their Item Tracker page. Items with Requestable = No can only be assigned by admins directly.

Assigning an Item to an Employee

Once your item definitions are set up, you can assign items to individual employees from their personnel profile.

1. Click Personnel in the left sidebar.
2. Find the employee you want to assign an item to and click the arrow (→) next to their name.
3. On the employee's profile, click the Item Tracker tab.

ProactEHS

← Go Back | Item Definitions > BBP PPE

BBP PPE Edit

ITDE_000007

Content Attachments Audit

Active
Do you want this item to be active? Inactive items are hidden from the user item tracker dashboard.
Yes

Name
BBP PPE

Description
More BBP PPE Items, please specify in the comments if it is specific items.

Renews in Days
If this item needs to be renewed, enter the number of days it should be renewed in. When that many days have passed, the item will expire and the administrator will be notified to renew it. The assignee is not notified.

Requestable by Employees
If enabled, users may request this item through the user item tracker dashboard. If disabled, this item may only be assigned directly by Administrators.
Yes

Item Assignments

+ New Assignment Export

Actions	Assigned To ↑↓	Assigned By ↑↓	Identifier ↑↓	Status ↑↓	Serial ↑↓	Description ↑↓	Created On
	Filter Mode: Contains	Filter Mode: Contains	Filter Mode: Contains		Filter Mode: Contains	Filter Mode: Contains	Filter Mode:

4. The Item Tracker tab shows 'Item Assignments' — a list of all items currently assigned to this employee.
5. Click the yellow + New Assignment button.
6. In the assignment form:
 - Select the Item Definition from the dropdown (this shows all active items you've set up in Item Tracker Manage).
 - Enter a Serial Number if applicable (e.g., a unique ID on the physical item).
 - Set an Expiration Date or leave it to be calculated from the 'Renews in Days' setting.
7. Click Save. The item will appear in the employee's Item Assignments list with ACTIVE status. The employee will also see it in their Item Tracker dashboard under 'My Assigned Items'.

i Tip: You can also view all assignments for a specific item type by going to Item Tracker (Manage), clicking on the item, and scrolling down to the Item Assignments section.

Reviewing Employee Item Requests

When an employee requests an item through their Item Tracker dashboard, it will appear in your Item Tracker (Manage) list for review. You can approve or deny the request and assign the item.

1. Click Item Tracker (Manage) in the sidebar.
2. Check for pending requests — they will appear with a PENDING status.
3. Click the arrow (→) next to a pending request to review it.
4. If you approve it, click + New Assignment on the employee's profile to formally assign the item. If you deny it, you can delete or reject the request.

Other Admin Features

Analytics

The Analytics module gives you reports and dashboards on EHS activity across your organization.

1. Click Analytics in the left sidebar.
2. Use the available report tabs to view data on Training completion, Actions, Incidents, and more.

Actions Dashboard

Assigned Date: 2026/01/01 00:00:00 - 2026/12/31 00:00:00

Total Action Count: 20

Past Due Action Count: 2

Overdue 30+ Days: 1

Action Counts by Assigned User

Assigned User	Total Action	Past Due Action Count	Overdue 30+ Days
Grant McKelvey	1	1	1
Josh Davies	6	1	1
Adam Jaenke	8	0	0
Cory White	2	0	0
Jeff Jaenke	8	1	0
Sadam Baig	4	1	0

Action Counts by Assigned User's Supervisor

Assigned User's Supervisor	Total Action	Past Due Action Count	Overdue 30+ Days
null	1	1	1
Grant McKelvey	15	2	1
Cory White	6	1	0

Action Counts by Assigned User's Department

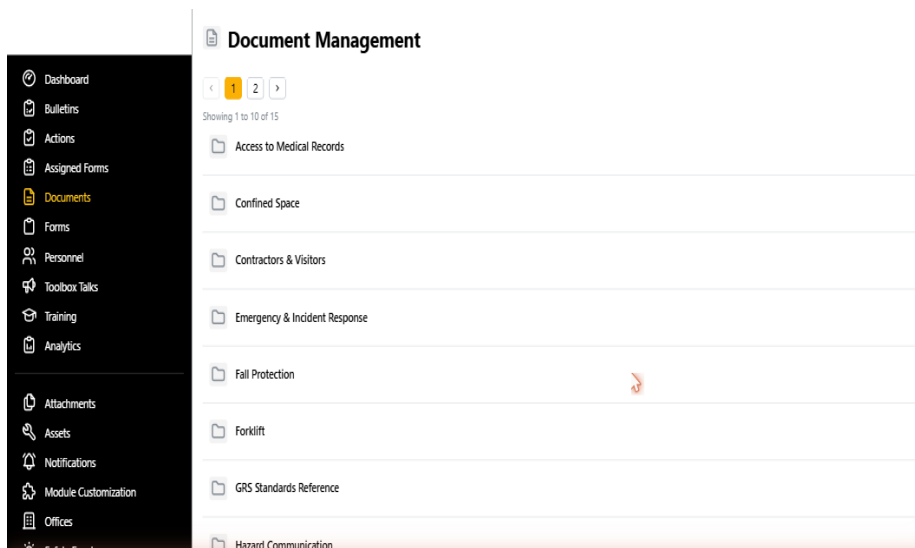
Assigned User's Department	Total Action	Past Due Action Count	Overdue 30+ Days
null	12	2	1
	9	1	0

3. Use the date range and office filters to narrow your view.
4. Click Export to download reports as spreadsheets.

Documents

The Documents module is a file library where you can store and share safety documents, policies, and reference materials.

1. Click Documents in the left sidebar.



2. Click + Upload to add a new document or folder.
3. Employees can access Documents from their sidebar to find reference materials.