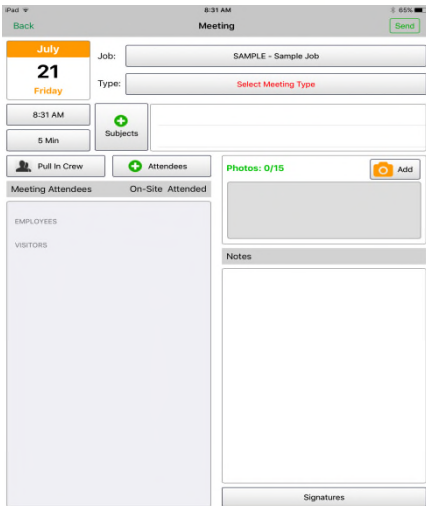


## HCSS Safety – Field Meetings Report

This document details how to set up, schedule, record, and report on Safety Meetings using the Meetings module of the HCSS Safety application.

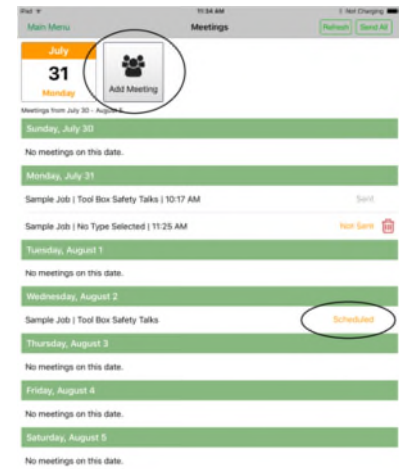
### Recording a Meeting

Select the **Meeting Icon** from the Field Safety Home Page. Confirm that the Job, date and time are correct.



### A. Starting a Meeting Record

1. The weekly Calendar will appear showing Meetings that have been held that week and Meetings that are still open and not yet SENT.
2. If a Meeting has been Scheduled by the Safety Manager, the word **Scheduled** will appear. You will see a row detailing the assigned Job and Meeting Type for that Meeting. Tap on the line and the Scheduled Meeting will open.
3. To open a new meeting tap on the **Add Meeting** Icon.



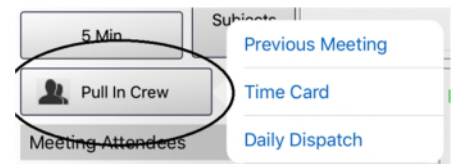
### B. Adding and Viewing Meeting Content

1. Tap the **Type** bar to select or change the **Meeting Type**. This selection will determine the **Subjects** from which you can choose.
2. Tap the **Subjects** button and you will see a list of all available **Topics** for the **Meeting Type** you've selected. Tap on a **Topic** to view the **Subjects** within it.
3. **Add a Subject** by tapping on that line. A paper clip icon will appear to the right of any subject that carries one or more **Attachments**.
4. Tap one or more Subjects to add them to your **Meeting** record.
5. Tap elsewhere on the screen to close this menu when you've selected all desired **Topics**.



### C. Adding Attendees

1. If your company uses **Heavy Job Mobile**, and you want to pull in **Attendees** from an existing **Time Card**, tap the **Pull in Crew** button and then select **Time Card**. This will pull in all **Employees** listed on the most recent **Time Card** within the current **Job**.
2. If your company uses **The Dispatcher**, and you want to pull in **Attendees** assigned to you within the **Daily Dispatch** for the day of the **Meeting** you're recording, tap the **Pull in Crew** button and select **Daily Dispatch**.



- To add individual **Employees** to your list of **Attendees**, tap the **Attendees** button and select **Employees**. This will display a list of all active **Employees** by full Company Library or by Job. Tap each employee you want to add to your **Meeting** record and then tap elsewhere on the screen to close the list.
- To add people who are not listed as **Employees** of your company tap **Attendees** and then select **Visitors**. Type in the **Visitor's** name and a brief note to explain why they took part in the meeting.

**Note** – You can pull Attendees in from multiple sources; the application will simply add any new Attendees to the list of those who are already part of your Meeting record.

#### D. Recording Other Meeting Details

- To attach **Photos** tap the **Add** button.
- Take a **Photo** and then tap **Use Photo** to save or select.
- If you have already taken a Photo, select the **From Gallery** option to access your gallery and select one or more **Photos**.
- To Annotate a Photo tap on the thumbnail of a **Photo** to access the **Photo Preview** screen. From this screen, tap **Annotate** in the upper-right corner if you want to use your finger to draw or write on that **Photo**. Tap **Back** to save.
- Tap within the **Notes** field to record additional information about the **Meeting**.

#### E. Adding Signatures

- Collect **Attendee Signatures** by tapping the **Signatures** button and then the name of an **Attendee**. Allow the **Attendee** to sign and then tap **Accept Signature**. Once all **Signatures** have been collected, tap **Back** to return to the **Meeting Entry** screen.

#### F. Submitting Meeting Report

- Once you have finalized your **Meeting** record tap the **Send** button at the top-right corner of the **Meeting Entry** screen to submit your report to **Safety Manager**.
- Select **Send** or **Send and Email** to provide the reports to anyone who is without access to HCSS Safety, such as a customer.

**Note** – After you've hit **Send** to submit a Meeting record, the record can no longer be edited. It is important to confirm that everything you've entered is accurate before this point.