

# Introduction and Overview

Occupational Health Surveillance System (OHSS) provides an automated mechanism for conducting a risk assessment and corresponding medical evaluation for employees with exposure to animal biohazards and other workplace or laboratory exposures. This system replaces the Animal Exposure Questionnaire (AEQ) as of Dec. 5, 2016.

## Accessing the System

The system can be accessed at <https://ehs.ucop.edu/ohss>

## Browser Recommendations

The system is available for use on all browsers, however it is recommended whenever possible to use Chrome. If using IE or Firefox, you must have the newest version installed on your computer for optimal results.

## CalNet ID

- In order to be access OHSS, all personnel must have a valid CalNet ID, an online identity which allows access to many UC Berkeley online services.
- A CalNet ID is generated for employees or students by their sponsoring department's Human Resources (HR) Representative.
- If you are a not a UCB employee or student (e.g., visiting summer students, volunteers), you can still obtain a CalNet ID from your sponsoring department. For more guidance, please contact the Office for Animal Care and Use (OACU) at 642-8855 or [acuc@berkeley.edu](mailto:acuc@berkeley.edu)

## Workflow



## Roles

### Supervisor (PI)

- Creates the Risk Assessment for the participant
- Can check status but cannot view any personal health information

# Introduction and Overview

## Roles (Continued)

### Participant (Other Personnel)

- Reviews Risk Assessment and agrees or disagrees
- Completes Health Questionnaire
- Acknowledges Medical Assessment

### Medical/Admin (Occupational Health)

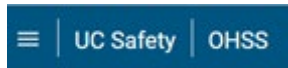
- Creates medical assessments, performs medical consultations, and either approves or disapproves the participant’s ability to work
- Assigns roles to appropriate individuals
- Has access to all records in the campus
- Medical professionals, admins in charge of role assignment

### Reviewer (ACUC)

- Sees status of each process and responsible for following up with participants
- Does not see Health Questionnaire and Medical Assessment
- IACUC/Biosafety Officers, individuals who need to know status of a group of people

## General Tips

- To get back to the home page, select **OHSS** from the header bar



- All columns on the assessment pages are sortable
  - To sort, double click on the column header you wish to sort on
- Hover over the **i** to view informational/help text
- You can determine the status of an assessment by hovering over the letter next to the date
- Items marked with a red flag require your attention



Supervisor	RA	HQ	MA
Marion Cotillard	10/05/2015 - A	10/05/2015 - C	 10/05/2015 - CR

The screenshot shows a table titled 'My Assessments'. Above the table, there is a legend: a red flag icon followed by '= Action Required'. The table has four columns: 'Supervisor', 'RA', 'HQ', and 'MA'. Each column header has a double-headed arrow and an information icon. The first row of data shows 'Marion Cotillard' in the Supervisor column, '10/05/2015 - A' in the RA column, '10/05/2015 - C' in the HQ column, and '10/05/2015 - CR' in the MA column. A red flag icon is placed to the left of the date in the MA column, and this entire cell is circled in red.

# Supervisor's Home Page

UC Safety | OHSS - Demo

## Welcome, Natalie Portman

**My Assessments**

- Assessment Renewals
- All Assessments
  - Incomplete
  - Completed
  - No Exposures

**Pending Actions**

- Review Medical Assessment(s)  
A health professional has completed a Medical Assessment for your review  
or You have an incomplete Health Surveillance survey that requires your attention.
- Renewal processes  
Renewal processes require your attention.

**Supervisor Actions**

- Create a New Risk Assessment  
If you are a Supervisor...

[Learn about OHSS Process](#)

Everything a supervisor has access to do and view can be accessed from their homepage.

## Sections

On the Supervisor's Home Page there are six main sections:

- **My Assessments** displays the Risk Assessments (RA), Health Questionnaires (HQ), and Medical Assessments (MA) that the person logged in was the participant on
- **Assessment Renewals** displays the participants who are due for renewal and need their Risk Assessments reviewed or updated.
- **All Assessments** is a view of all the assessments and their statuses that the person logged in has created for others, as well as any that have been created for them.
- **Pending Actions** displays any items requiring your immediate action
- **Supervisor Actions** allows you to create a Risk Assessment from scratch
- **Learn about the OHSS Process** is an expandable graphic that explains the process in 5 steps

# OHSS Quick Tips for Supervisors

Access the system at <https://ehs.ucop.edu/ohss>

## Searching for a Person

The people search is pulling names from the PPS feed and there are a lot of people with the same or similar names. In order to keep the system performing quickly, it is programmed so that only the top matches to your search results will display. For the best results, please follow these guidelines:

- Search by **Last Name, First Name**
  - The system will not recognize any other combination of a person's name
- For optimal results, enter the person's full name or as many characters as you know
- About 2-5% of the users will not show up when searched for in OHSS. If you have someone who you cannot find, please ask them to log in to <https://ehs.ucop.edu/uksafety>. Completing this step will allow the system to capture the necessary information about the participant and in turn, the supervisor will then be able to search and select the employee for the Risk Assessment.
- If you continue to experience problems searching for an individual, you can contact the Service Desk at [erm@ucop.edu](mailto:erm@ucop.edu) for additional troubleshooting.

## Copying a Risk Assessment

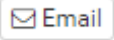
Supervisors with multiple employees performing similar duties can create a single Risk Assessment and then copy it for each of their employees.

Participant	Supervisor	Department	RA
<input type="checkbox"/> Marion Cotillard	Natalie Portman	MEDICINE	09/21/2016 - A

- From the home screen go to **All Assessments**
- Find the name of the participant's Risk Assessment that you wish to copy
- In the column listed RA (for Risk Assessment) select the drop down arrow
- Select **Copy**
- Search for the person you wish to copy the assessment to
- You can edit the Risk Assessment once it has been copied

## OHSS Quick Tips for Supervisors

### Checking the Status of an Assessment

- From the home screen, go to **All Assessments**
- Select the column header you wish to sort by
- Find the person in question then hover over the last date in the row to see what the status code means
- If you are the supervisor for an individual, you can resend reminder emails by selecting the **Email** button  on the far right
- You can also archive any employees/assessments that are no longer active. *The system will remove them from the list, however the data will not be erased from the system!*

# Supervisor– Creating a Risk Assessment

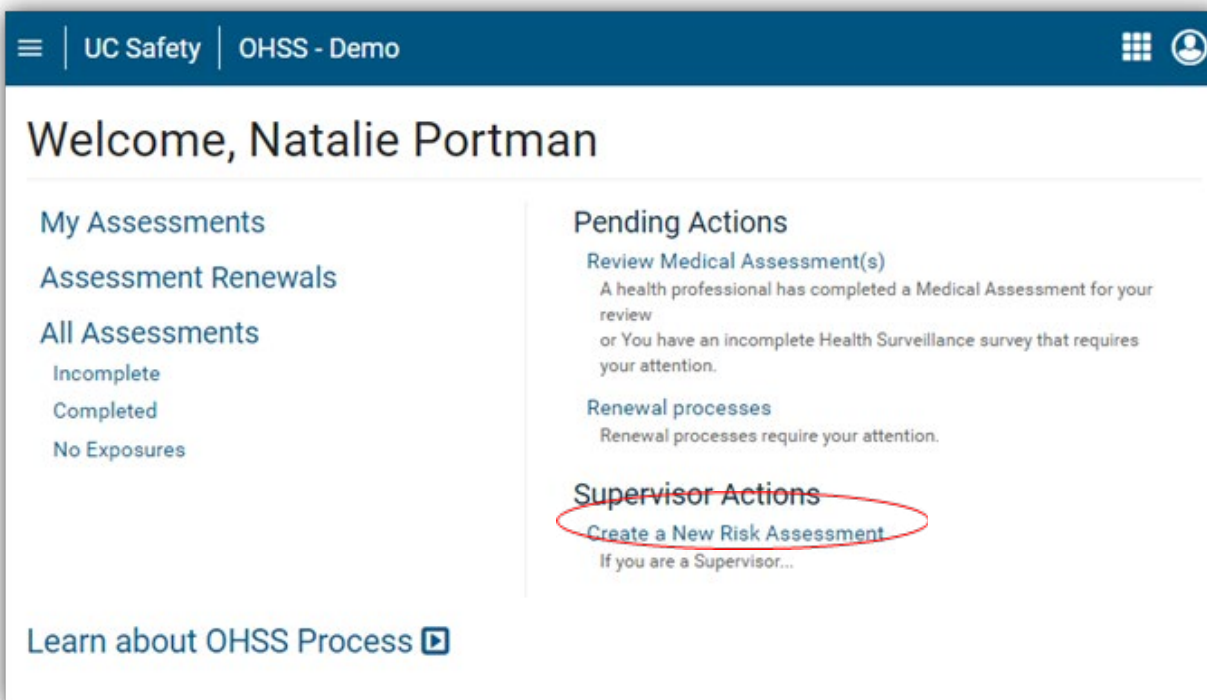
## Creating and submitting a Risk Assessment

Supervisors initiate Risk Assessments for new employees or researchers. There are two ways to create a Risk Assessment form:

1. From scratch
2. Copy an existing one
  - If a supervisor has multiple lab workers performing the same research, they can use the Copy Assessment feature to quickly reproduce multiple risk assessments.

To create a Risk Assessment from scratch:

- From your homepage under **Supervisor Action** select **Create a New Risk Assessment**



- Enter the participant's last name first. You must enter the entire last name.
- As you type, a list of names will appear for you to select. For optimal results, enter the person's full name as last name, first name.
- Select the participant you wish to create a Risk Assessment for
  - If participant cannot be found in the search feature, please direct the participant to log in to OHSS. The system will capture their identity information and add them to the system. Only after they have logged in using their campus credentials will they be able to access the system.

## Supervisor – Creating a Risk Assessment

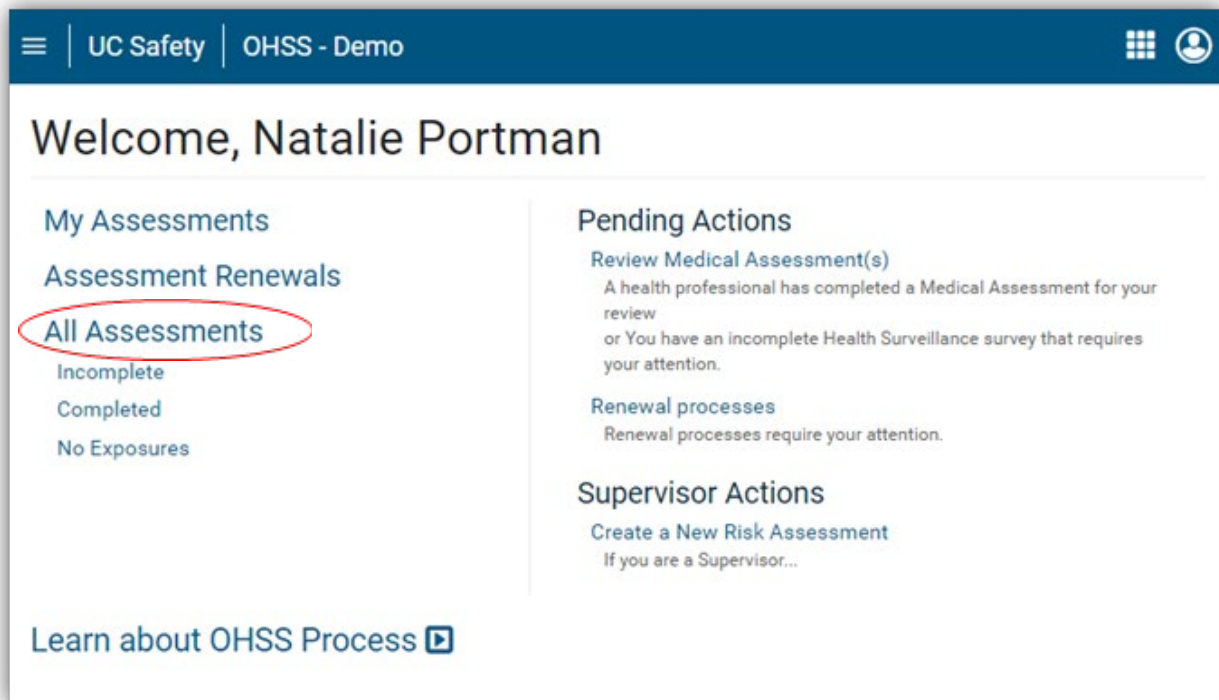
- Once the person has been selected, you will be instructed to complete the Risk Assessment form.
  - For security purposes, you will only have 30 minutes to complete the Risk Assessment. ***If you do not complete it in the given timeframe your data will not be saved.***
- There are nine sections to the Risk Assessment form. All nine sections should be completed before submitting the form. The nine sections are:
  - Participant Status
  - Animal Contact
  - Biological Agents
  - Exposures
  - Physical Agents
  - Chemical Agents
  - Animal Exposures
  - Blood Borne Pathogens Exposure Control
  - General Safety
- Once all sections of the form are completed, as the supervisor, you will need to electronically sign the form by checking the **Supervisor's Signature** box. Doing so confirms that the information provided is accurate.
- Select the Create **Risk Assessment** button

# Supervisor– Copying a Risk Assessment

## Copying a Risk Assessment from an Existing One

A completed Risk Assessment can be copied to expedite the creation of multiple Risk Assessments with similar hazards and risks. To create a Risk Assessment from a copy:

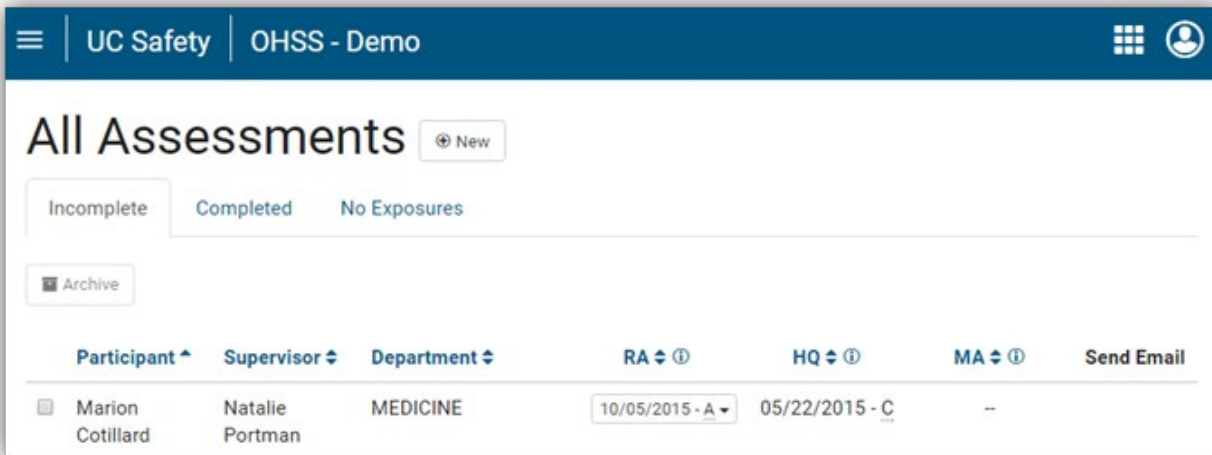
- Go to **All Assessments**



- In the RA column, find the name of the person whose Risk Assessment you would like to copy



## Supervisor – Copying a Risk Assessment



Participant ^	Supervisor ⇅	Department ⇅	RA ⇅ ⓘ	HQ ⇅ ⓘ	MA ⇅ ⓘ	Send Email
<input type="checkbox"/> Marion Cotillard	Natalie Portman	MEDICINE	10/05/2015 - A	05/22/2015 - C	--	

- Select the drop down arrow
- Select the **Copy Risk Assessment** option
- Search for the person (last name, first name) you wish to apply this Risk Assessment to and select them from the list
- Review the Risk Assessment and make any edits
- When the assessment is completed, select the **Create Risk Assessment** button

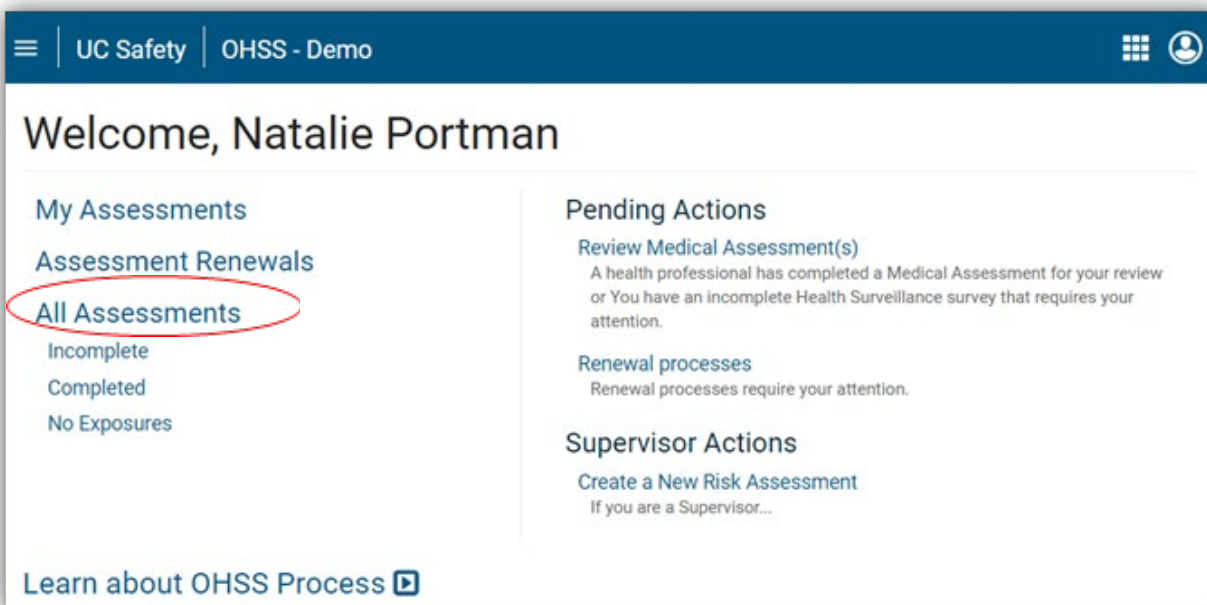
Once the Risk Assessment has been created, it is ready for participant review. The system permits the Supervisor to send a pre-drafted email to the participant detailing what steps they need to take next. There is an open text box in the email as well, which allows the Supervisor to add custom information to the email.

## Supervisor – Checking a Participant’s Status

Supervisors have access to view a Participant’s status at any point in the Health Surveillance process. They are not permitted to see any Protected Health Information, therefore they can only see the status of the Health Questionnaire or Medical Assessment.

### Review a Participant’s status

- Go to **All Assessments**



- You will automatically be taken to the **Incomplete** tab
  - If the person has not completed the process, they will show up here
  - If they have completed it, you will need to search for them in the Completed tab

## Supervisors – Checking a Participant’s Status

The screenshot shows a web interface for 'UC Safety | OHSS - Demo'. The main heading is 'All Assessments' with a 'New' button. Below the heading are filters for 'Incomplete', 'Completed', and 'No Exposures', and an 'Archive' button. A table lists assessments for 'Marion Cotillard' supervised by 'Natalie Portman' in the 'MEDICINE' department. The table has columns for 'Participant', 'Supervisor', 'Department', 'RA', 'HQ', 'MA', and 'Send Email'. The first row shows RA on 10/05/2015 (A), HQ on 05/22/2015 (C), and MA on 10/10/2016 (CR), with an 'Email' button and the date 10/10/2016. The second row shows RA on 05/22/2015 (P) and HQ on 05/22/2015 (C), with an 'Email' button.

Participant	Supervisor	Department	RA	HQ	MA	Send Email
Marion Cotillard	Natalie Portman	MEDICINE	10/05/2015 - A	05/22/2015 - C	10/10/2016 - CR	Email 10/10/2016
Marion Cotillard	Natalie Portman	MEDICINE	05/22/2015 - P	05/22/2015 - C	--	Email

- Find the person and assessments you wish to check the status of
  - You can sort by selecting the heading of the column you wish to sort on
- Hover over the letter next to the date to view the status of the Risk Assessment (RA), Health Questionnaire (HQ) or the Medical Assessment (MA)
- If there is action to be taken by the Participant, as the Supervisor, you can resend the last email by selecting the Email button on the far right
  - Once you select the email button, another tab will open where you can view and add additional text to the email before sending
  - The Participant will be notified via email to take action

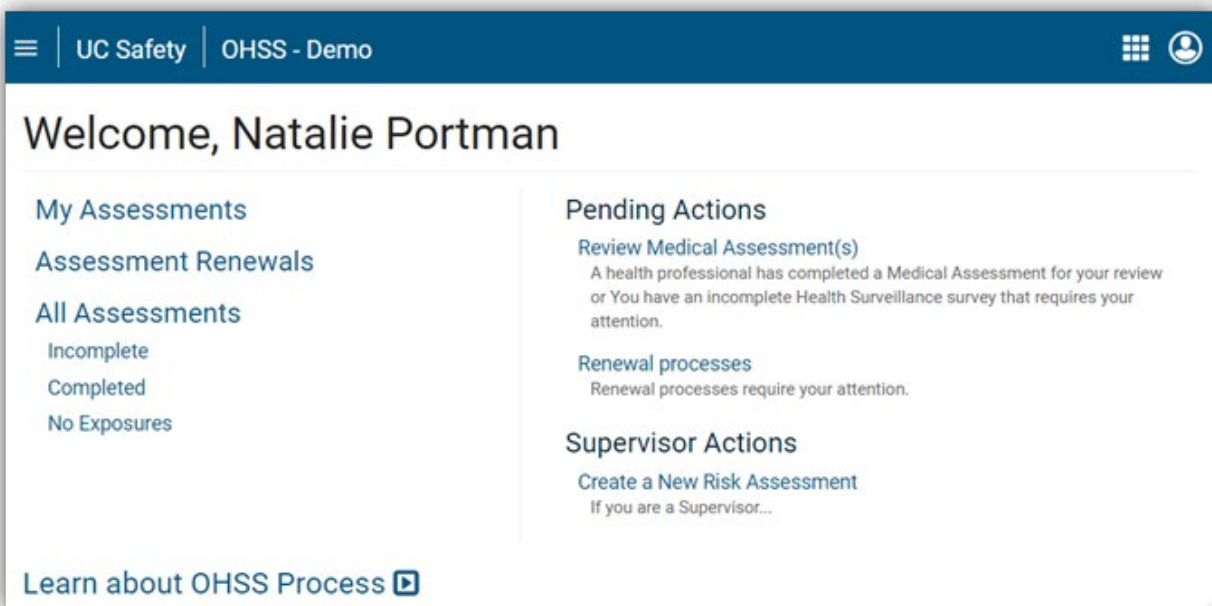
# Supervisor– Archiving/Deactivating Assessments

If an employee is no longer part of the Occupational Health Surveillance program, or has switched supervisors, you can archive or deactivate their assessments.

- Archiving is done on incomplete assessments
- Deactivating will deactivate the renewal process on a previously completed assessment. Deactivating will turn off the email reminders to the current supervisor for the corresponding deactivated assessments.

## Archiving Incomplete Assessments

- Select the **All Assessments** from your homepage



- You will automatically be taken to the **Incomplete** tab
- Check the box next to the name of the participant you wish to Archive

# Supervisor – Archiving/Deactivating Assessments

The screenshot shows the 'All Assessments' page in the UC Safety OHSS - Demo system. The page has a header with 'UC Safety | OHSS - Demo' and a user profile icon. Below the header, there is a 'New' button and three filter tabs: 'Incomplete', 'Completed', and 'No Exposures'. An 'Archive' button is also visible. The main content is a table with the following columns: Participant, Supervisor, Department, RA, HQ, MA, and Send Email. The table contains two rows of data:

Participant	Supervisor	Department	RA	HQ	MA	Send Email
<input type="checkbox"/> Natalie Portman	Marion Cotillard	UCDMC MEDICAL CENTER	10/05/2015 - A	10/05/2015 - C	10/05/2015 - CR	
<input checked="" type="checkbox"/> Marion Cotillard	Natalie Portman	MEDICINE	10/05/2015 - A	05/22/2015 - C	--	

- Select the **Archive** button
  - You will then be prompted to provide a reason for archiving the selected assessments
- You can also deactivate the renewals process when it comes up for renewal. Deactivating is similar to archiving.

## Deactivating Assessments Up for Renewal

- Go to the **Assessment Renewals** page

The screenshot shows the 'Welcome, Natalie Portman' dashboard in the UC Safety OHSS - Demo system. The dashboard has a header with 'UC Safety | OHSS - Demo' and a user profile icon. Below the header, there is a 'Welcome, Natalie Portman' message. The dashboard is divided into two main sections: 'My Assessments' and 'Pending Actions'.

**My Assessments**

- Assessment Renewals
- All Assessments
  - Incomplete
  - Completed
  - No Exposures

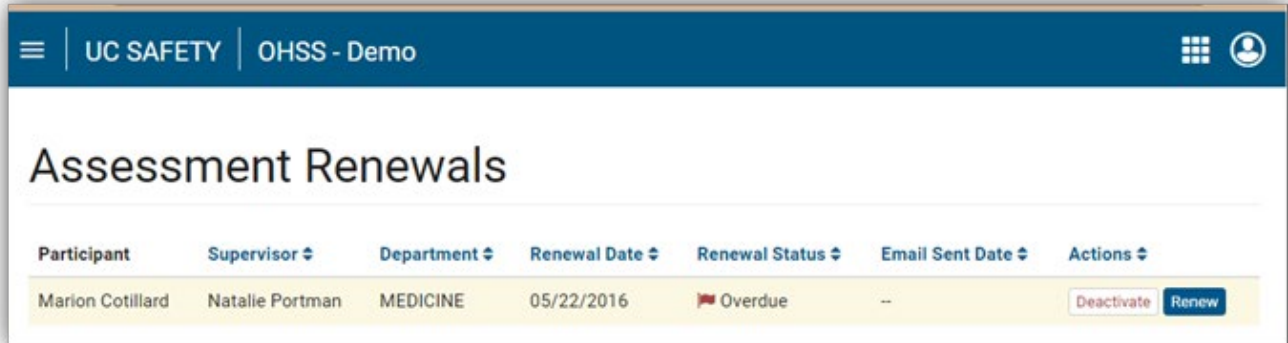
**Pending Actions**

- Review Medical Assessment(s)**  
A health professional has completed a Medical Assessment for your review or You have an incomplete Health Surveillance survey that requires your attention.
- Renewal processes**  
Renewal processes require your attention.
- Supervisor Actions**  
Create a New Risk Assessment  
If you are a Supervisor...

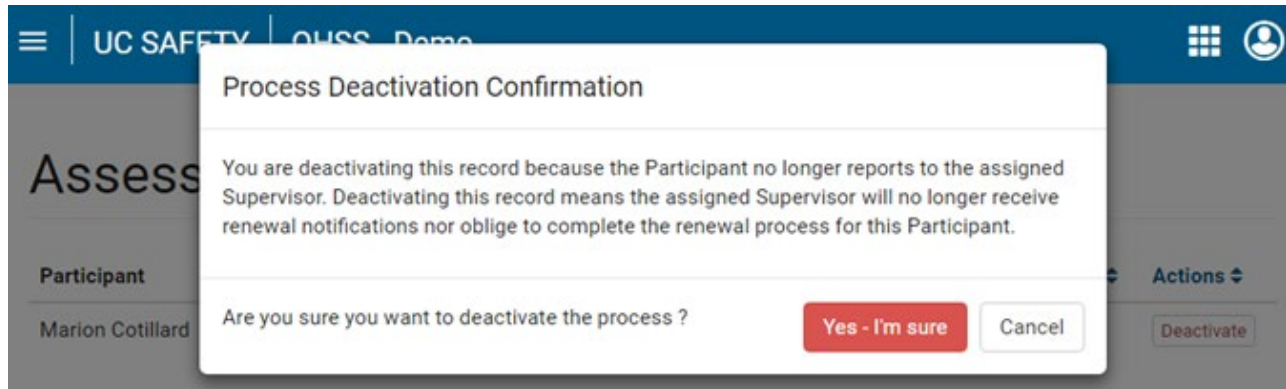
Learn about OHSS Process

# Supervisor – Archiving/Deactivating Assessments

- From the **Assessment Renewals** page, select **Deactivate**



- Select the **Yes - I'm sure** button



# OHSS Quick Tips for Participants

Access the system at <https://ehs.ucop.edu/ohss>

## Pending Actions



- On your home page, the Pending actions section to the right will tell you what is required of you to further the process.

### Pending Actions


#### Review Risk Assessment(s)

Your supervisor has completed a Risk Assessment form for your review.

## Checking the Status of Your Assessment

- From the home screen, go to **My Assessments**
- Anything with a red flag requires your attention  09/21/2016 - P
- You can also sort by the column headers
- You can hover over the date of the risk assessment, health questionnaire or Medical Assessment in order to see what the status code means
- If you are the supervisor for an individual, you can resend reminder emails by selecting the  Email button on the far right
- You can also archive any employees/assessments that are no longer active. *The system will remove them from the list, however the data will not be erased from the system!*

## Acknowledgement of the Medical Assessment

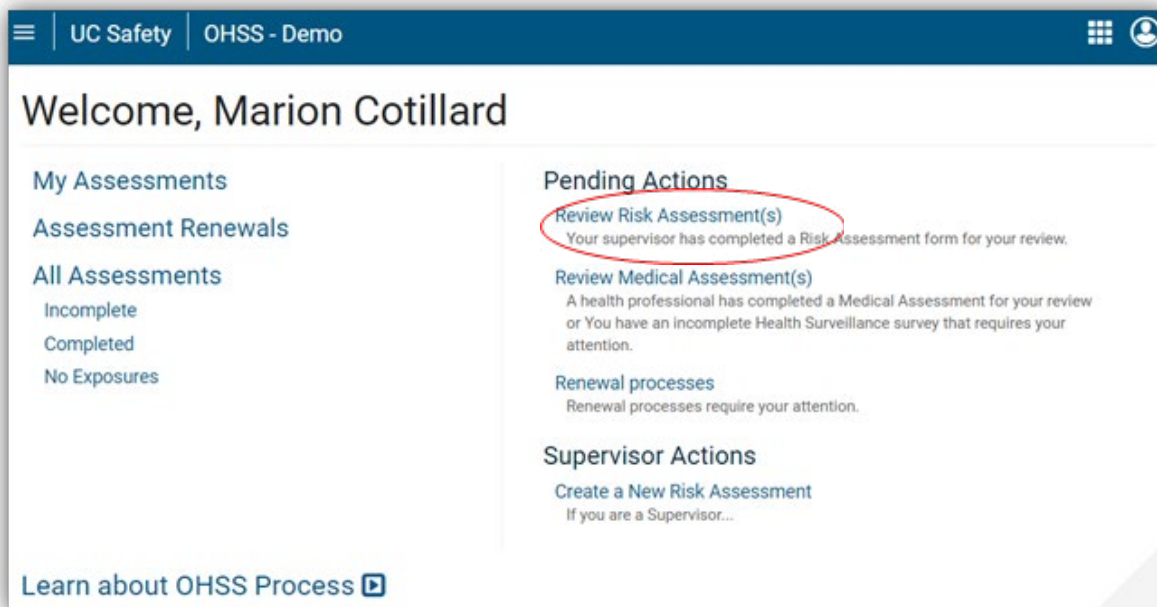
- Participants must acknowledge the Medical Assessment even if no services are required in order to complete the process. To acknowledge your Medical Assessment:
- Log in to [ehs.ucop.edu/ohss](https://ehs.ucop.edu/ohss)
- Select Review Medical Assessment under pending actions
  - This option will only display if your assessment is ready for you to acknowledge
- You will be taken to the My Assessments page
  - In the MA column, any Medical Assessment requiring acknowledgment will have the red flag
- Select the date to view the Medical Assessment
- Review the Medical Assessment and select the  button
  - You will see a confirmation screen when the process is complete
  - You can double check that it was completed by checking the My Assessments page in the Process Completed column

## Participant– Reviewing a Risk Assessment

When a Supervisor completes a Risk Assessment for a participant, they will receive an email notifying them that there is a Risk Assessment for their review. If they do not receive the email, they can log in to <https://ehs.ucop.edu/ohss> to review the assessment.

### To Review an Assessment

- From your homepage under pending action, select **Review Risk Assessment(s)**



- You will be taken to the My Assessment Page. The **My Assessments** displays the Risk Assessments (RA), Health Questionnaires (HQ), and Medical Assessments (MA) that you are the participant on.

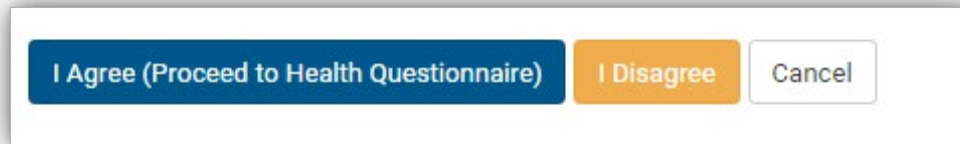
The screenshot shows the 'My Assessments' page for Natalie Portman. The table below lists the assessments:

Supervisor	RA	HQ	MA	Process Completed
Natalie Portman	🚩 05/22/2015 - P	05/22/2015 - C	--	--

- Items marked with a red flag require your attention
  - You can select the date to review the assessment
- To determine the status, hover over the letter next to the date
- Once you have reviewed the Risk Assessment you will be asked to accept or disagree with it



## Participant – Reviewing a Risk Assessment



- If you disagree with the assessment, select the I Disagree button
  - The Risk Assessment is sent back to the PI/Supervisor for editing
  - You are presented with the option to send an email indicating why you disagree with the assessment
- If you agree with the Risk Assessment, you will be taken to the Health Questionnaire

# Participant – Submitting a Health Questionnaire

## Submitting a Health Questionnaire Form

Once a Risk Assessment has been completed, the Participant will be taken to the Health Questionnaire. The Health Questionnaire is filled out by the Participant and routed to a Medical Professional for review. The participant will be notified once their Health Questionnaire is approved or not approved by the Medical Professional.

- The Supervisor never sees the Health Questionnaire
- The participant only needs to complete the Health Questionnaire form one time and it will be reused if they have multiple Risk Assessments
- The Participant only has 30 minutes to complete the form, so it is very important to have access to your medical information while completing the HQ

### **The Health Questionnaire:**

Provides the Medical Professional with Participant's medical history, including:

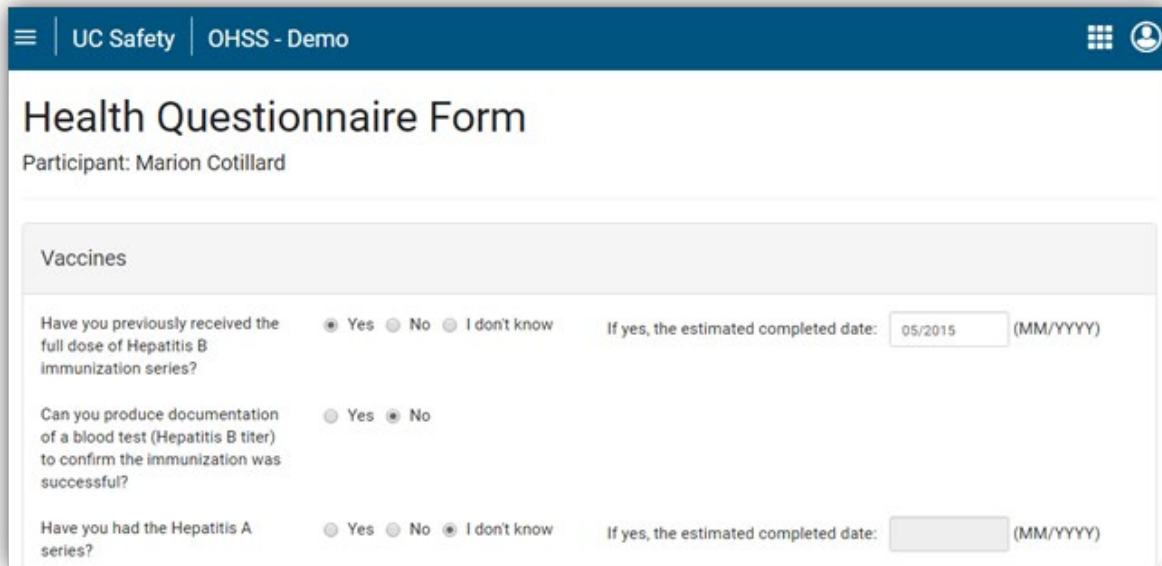
- Vaccines
- Tuberculosis Screening
- General History
- Exposures
- Biological Hazards
- Allergies
- Prescription Medications
- Health Status Changes

## Completing the Health Questionnaire

Participants should complete the Health Questionnaire to the best of their ability. Any unknowns or unclear answers may slow down the process.

- Participants will be automatically taken to the Health Questionnaire upon agreeing to the Risk Assessment

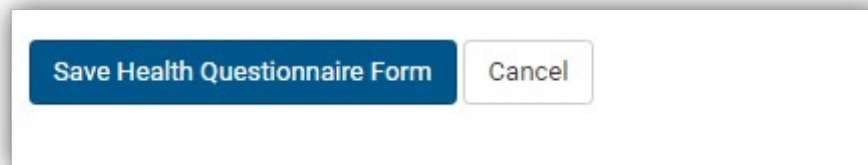
# Participant – Submitting a Health Questionnaire



The screenshot shows a web interface for a "Health Questionnaire Form". The header includes "UC Safety | OHSS - Demo" and a user profile icon. The form title is "Health Questionnaire Form" with the participant name "Participant: Marion Cotillard". The section is titled "Vaccines" and contains three questions:

- Question 1: "Have you previously received the full dose of Hepatitis B immunization series?" with radio buttons for Yes, No, and I don't know. A date field shows "05/2015 (MM/YYYY)" with the label "If yes, the estimated completed date:".
- Question 2: "Can you produce documentation of a blood test (Hepatitis B titer) to confirm the immunization was successful?" with radio buttons for Yes and No.
- Question 3: "Have you had the Hepatitis A series?" with radio buttons for Yes, No, and I don't know. A date field is empty with the label "If yes, the estimated completed date:" and "(MM/YYYY)".

- If you choose to come back and complete the Health Questionnaire later, you can access it from your home page under **Pending Actions**
- If a Health Questionnaire is already on file, you can review the form and approve it with no changes, or if there have been changes to your health, you can modify it by selecting the **Modify** button at the bottom of the page
- Once you have completed the Health Questionnaire, select the Save Health Questionnaire button



A rectangular box containing two buttons: a blue button labeled "Save Health Questionnaire Form" and a white button labeled "Cancel".

The next step will be for the Medical Reviewer to review the Risk Assessments and your Health Questionnaire and perform a Medical Assessment.

# Participant – Acknowledging a Medical Assessment

Once the Medical Reviewer has reviewed your Risk Assessment and your Health Questionnaire, they will complete a Medical Assessment determining what, if any, medical services or consultations are needed before you are able to work on a protocol. Participants must acknowledge the Medical Assessment in the system whether are services recommended or not to advance in the process.

## Acknowledge the Medical Assessment

- Go to **Review Medical Assessments** under the **Pending Actions** heading

The screenshot shows a user interface for the Occupational Health Surveillance System. The user is Marion Cotillard. The 'Pending Actions' section is highlighted, specifically the 'Review Medical Assessment(s)' item, which is circled in red. This item includes a red flag icon and a description: 'A health professional has completed a Medical Assessment for your review or You have an incomplete Health Surveillance survey that requires your attention.' Other actions include 'Verify Your Health Questionnaire', 'Renewal processes', and 'Supervisor Actions'.

- Selecting that action will take you directly to the **My Assessments** page
- The red flag will indicate which assessment(s) require your attention

 = Action Required

- Select the assessment you wish to acknowledge by selecting the date
- Carefully read the Medical Assessment
- Once you have read and understood the Medical Assessment, select the **I Have Reviewed my Medical Assessment** button at the bottom

# Participant – Acknowledging a Medical Assessment

If a phone consultation or other medical services are recommended, you must get authorization and a recharge number from your department before making an appointment at Occupational Health Services (555) 555-555.

I Have Reviewed My Medical Assessment.

- If no services are required, or the services are only recommendations, you will be cleared in the system

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## Medical Assessment Review: Completed

Thank you for completing your Medical Assessment review!

Done

- If services are required, you will receive a message to contact the Occupational Health Clinic to complete the process

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## Medical Assessment Review: Incomplete

You must contact the OHSS office at (555) 555-555 in order to complete your assessment process.

Done

- You can check the date of completion in the My Assessments page, under the Process Completed column

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## My Assessments

🚩 = Action Required

Supervisor	RA	HQ	MA	Process Completed
Natalie Portman	10/10/2016 - A	05/22/2015 - C	10/11/2016 - C	10/11/2016