

**U.S. COAST GUARD  
Work Life Information Management System (WIMS)**

**Workplace Violence Program  
User Guide**

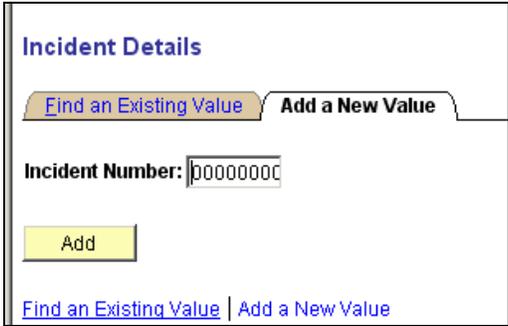
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## How To Enter a Workplace Violence Incident

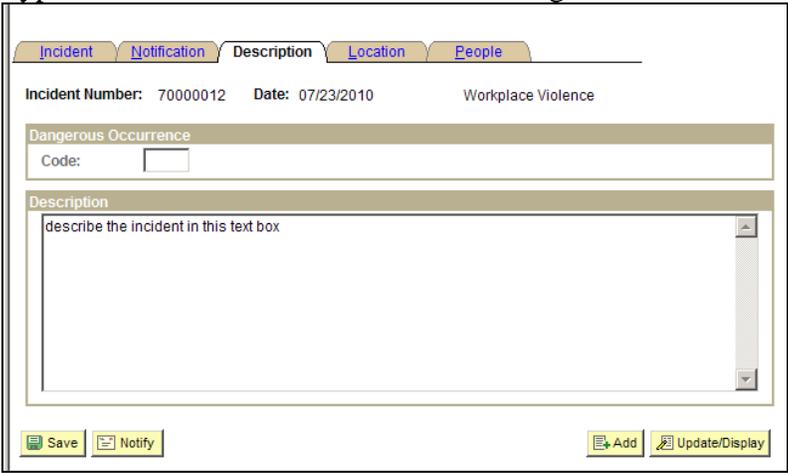
**Use** When there is an incident of Work Place Violence or Threatening Behavior, it is added to the system. The user will take the following actions to add the Incident Details

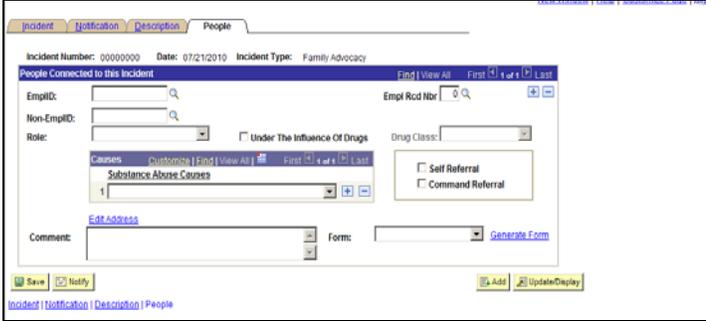
- Pages**
- Incident
  - Notification
  - Description
  - Location
  - People

Step	Action
1	<p>To add a new incident, click on <b>Incident Details</b>:</p>  <p>The screenshot shows a software interface with two main menu sections: 'Worklife Program' and 'Worklife Reports'. Under 'Worklife Program', there are several links: 'Incident Details' (highlighted with a red box), 'Identify Corr/Prevent Actions', 'Employee Incident Summary', and 'Report Manager'. To the right of these links are other options: 'Incident/Injury - Member Setup', 'Add/Modify Non-Employee', and 'Add Action Request'. The 'Worklife Reports' section contains 'Case Owner Incidents Report' and 'Member Incidents Report'.</p> <ul style="list-style-type: none"> <li>• Select the <b>Add a New Value</b> tab.</li> </ul>  <p>The screenshot shows the 'Incident Details' form. At the top, there are two tabs: 'Find an Existing Value' and 'Add a New Value'. The 'Add a New Value' tab is selected. Below the tabs, there is a label 'Incident Number:' followed by a text input field containing '00000000'. Below the input field is a yellow 'Add' button. At the bottom of the form, there are two links: 'Find an Existing Value' and 'Add a New Value'.</p> <ul style="list-style-type: none"> <li>• Click on the <b>Add</b> button. The system automatically assigns an incident number. Please do not enter a number for a new incident.</li> </ul>

Step	Action
2	<p>On the <b>Incident</b> tab, do the following:</p> <ul style="list-style-type: none"> <li>• <b>Incident Date:</b> Enter without special characters in MMDDYYYY format, or use the calendar icon to select the date. The formatting is automatic upon saving or tabbing to the next field. The Incident Date must be the earliest date of any occurrence regarding this incident. When you get to the Notification tab, you will be prompted to enter a notification date. This notification date cannot be earlier than the Incident Date.</li> <li>• <b>Incident Type:</b> From the drop down option, select <b>Workforce Violence</b>.</li> <li>• <b>Incident Time</b> and time zone: This is a required field so if the time is unknown, check the field of <b>Time Undetermined</b> box. Please do not check the <b>Time Undetermined</b> box <i>AND</i> enter a time. Use only one or the other.</li> <li>• <b>Resulted in Injury or Illness:</b> This is a required field. Check the box.</li> <li>• <b>Is this a Recurrence:</b> If applicable, check the box.</li> <li>• <b>Investigated:</b> If applicable, check the box.</li> </ul> <div data-bbox="548 898 1214 1297" data-label="Form"> <p>The screenshot shows a web form for creating an incident. At the top, there are tabs for 'Incident', 'Notification', 'Description', 'Location', and 'People'. The 'Incident' tab is active. The form contains the following fields and options:</p> <ul style="list-style-type: none"> <li>Incident Number: 00000000</li> <li>*Incident Date: 07/22/2010 (with a calendar icon)</li> <li>*Incident Type: CISM (dropdown menu)</li> <li>Incident Time: [ ] PST (dropdown menu) <input checked="" type="checkbox"/> Time Undetermined</li> <li>Regulatory Region: USA (dropdown menu) United States</li> <li><input type="checkbox"/> Is This a Recurrence</li> <li><input type="checkbox"/> Resulted in Injury or Illness</li> <li><input type="checkbox"/> Investigated</li> </ul> <p>At the bottom of the form, there are buttons for 'Save', 'Notify', and 'Add'. Below the buttons are navigation links: Incident   Notification   Description   Location   People.</p> </div> <ul style="list-style-type: none"> <li>• Click the <b>Save</b> button.</li> <li>•  Use the <b>Notepad</b> to enter any additional information on the incident. To access the <b>Notepad</b>, click the icon. Please refer to the instructions on <i>“How to Use the Notepad.”</i></li> </ul> <p><b>Note:</b> You must save prior to using the Notepad otherwise the note created will not be attached to the Incident.</p>

Step	Action
4	<p>Select the <b>Notification</b> tab and enter the following data:</p> <ul style="list-style-type: none"> <li>• <b>Date Reported:</b> This cannot be a date earlier than the Incident Date.</li> <li>• <b>Time Reported:</b> Enter as military time and upon save it will be formatted to regular time and AM/PM. If unknown, leave the field blank.</li> <li>• <b>Reported To EmplID:</b> Click on the magnifying glass icon , and choose the person that the incident was reported to initially. If unknown, leave the field blank.</li> <li>• <b>Reported By EmplID:</b> Click on the magnifying glass icon , and choose the FAS entering and managing the incident.</li> <li>• <b>Reported By Non-EmplID - Do not use</b></li> <li>• <b>Date Recorded:</b> Default date (today's date).</li> <li>• <b>Time Recorded:</b> Enter as military time and upon save it will be formatted to regular time and AM/PM. If unknown, leave the field blank.</li> </ul> <div data-bbox="485 800 1276 1289" data-label="Form"> </div>

Step	Action
5	<p>Select the <b>Description</b> tab</p> <ul style="list-style-type: none"> <li>Type in the details of the incident in the large text box.</li> </ul>  <ul style="list-style-type: none"> <li>Click the <b>Save</b> button.</li> </ul>
6	<p>Select the <b>Location</b> tab and enter the following data:</p> <ul style="list-style-type: none"> <li><b>Occurred on Employer Premises:</b> Check the box.</li> <li><b>Location SetID:</b> Enter 00010.</li> <li><b>Location:</b> Select the magnifying glass icon and select the <i>Location</i> of the incident.</li> <li><b>Establishment ID:</b> Enter USCG</li> <li><b>Exact Location:</b> This is an optional description. Enter if known.</li> </ul> 

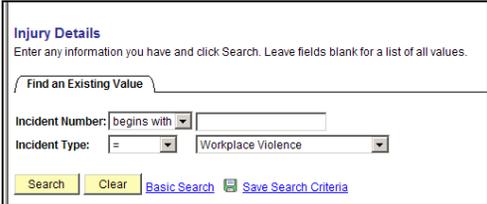
Step	Action
7	<p>Select the <b>People</b> tab to add <b>BOTH</b> Alleged Offender(s) and the Victim(s) to an incident.</p> <ul style="list-style-type: none"> <li>Select the <b>EmplID</b> or <b>Non-EmplID</b> (refer to instruction on “How to Add a Non Employee”) by clicking on the magnifying glass icon  next to the field.</li> </ul>  <ul style="list-style-type: none"> <li>Select the <b>EmplID</b> by clicking on the magnifying glass icon , click on the <b>Name</b> hyperlink from the lists presented.</li> <li>Select the EMPLID <b>Role</b> from the drop down list by selecting either: <ul style="list-style-type: none"> <li>➤ <b>Alleged Offender</b></li> <li>➤ <b>Victim</b></li> </ul> </li> <li>Click the <b>[+]</b> button to another EmplID or Non-EmplID’s and following the above steps.</li> </ul>  <ul style="list-style-type: none"> <li>Click the <b>Save</b> button at the bottom of the page once you have added <b>both</b> the EmplID and/or Non EmplID with roles as <b>Alleged Offender</b> (s) and <b>Victim</b> (s).</li> </ul>
	<p>To proceed, click the <b>Home</b> hyperlink in the top right corner of to return to Portal, <b>WorkLife Program pagelet</b> to continue, or select the <b>Sign Out</b> hyperlink. It is helpful for later activities to write down the incident number.</p>

## How to Associate an Injury with an Incident

**Use** The Victim and/or Alleged Offender must be associated with the Injury Details to create a Correction Plan. The user will take the following actions to associate the Victim and Alleged Offender to the Injury Details:

- Prerequisites**
- Incident
  - Non Employee (if applicable)

- Pages**
- Injury
  - Description

Step	Action
1	<p>From the Portal, Worklife Program pagelet do the following:</p> <ul style="list-style-type: none"> <li>• Click on <b>Incident/Injury – Member Setup</b></li> </ul>  <p>The screenshot shows two pagelets: 'Worklife Program' and 'Worklife Reports'. In the 'Worklife Program' pagelet, the 'Incident/Injury - Member Setup' link is highlighted with a red rectangular box. Other links include 'Incident Details', 'Identify Corr/Prevent Actions', 'Employee Incident Summary', 'Report Manager', 'Add/Modify Non-Employee', and 'Add Action Request'. The 'Worklife Reports' pagelet contains 'Case Owner Incidents Report' and 'Member Incidents Report'.</p> <ul style="list-style-type: none"> <li>• Enter the Incident Number and/or select the Incident Type as <b>Workplace Violence</b>.</li> </ul>  <p>The screenshot shows the 'Injury Details' search form. It includes a search bar with the placeholder 'Find an Existing Value'. Below the search bar, there are two dropdown menus: 'Incident Number: begins with' and 'Incident Type:'. The 'Incident Type' dropdown is currently set to 'Workplace Violence'. At the bottom of the form, there are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'.</p> <ul style="list-style-type: none"> <li>• Select the <b>Search</b> Button.</li> <li>• Click Incident (Step 1) to associate the person (s) involved.</li> </ul>

Step	Action
2	<p>On the <b>Injury</b> Page, select an EmplID or NonEmplID (<i>refer to “How to Add a Non Employee”</i>) by doing the following:</p> <ul style="list-style-type: none"> <li>• Click on the  magnifying glass next to the EmplID or NonEmplID and select the person from the list presented.</li> <li>• Enter the <b>Date Reported</b> (MMDDYYYY) without any special characters (auto formats upon save), or use the calendar icon to select the date.</li> <li>• Click on the [+] button to add the next person as above.</li> </ul> <div data-bbox="505 569 1200 951" data-label="Form">  <p>The screenshot shows a web form titled 'Injury' with a 'Description' tab. At the top, it displays 'Incident Number: 70000012' and 'Date: 07/23/2010' under the heading 'Workplace Violence'. Below this is a 'Person Involved' section with a search bar containing '1000031' and a magnifying glass icon, showing 'Gerald Parr' and 'Empl Rcd Nbr: 0'. Other fields include 'Date of Birth: 10/21/1940', 'Date of Death', and 'Gender: Male'. An 'Employee Data at Incident Date' section contains: 'Business Unit: OFECG Officer Prior Enlisted Svc CG', 'Department: 002037 UNKNOWN UNIT', 'Job Code: 000096 Lieutenant', and 'Location: 000246 UNKNOWN UNIT Ret w/Pay'. A 'Notification - This Person' section has 'Date Reported: 07/23/2010' and 'Time Reported: PST'. At the bottom are 'Save', 'Return to Search', and 'Notify' buttons.</p> </div> <ul style="list-style-type: none"> <li>• Click the <b>Save</b> button.</li> </ul>

Step	Action
3	<p>Select the <b>Description</b> tab and select the <b>Primary Outcome</b> of the injury or illness for each person entered. The options follow:</p> <ul style="list-style-type: none"> <li>➤ <b>Injury</b></li> <li>➤ <b>Illness</b></li> <li>➤ <b>Death</b></li> </ul> <p><i>Note:</i> If none of the above, do not use the above options.</p> <p>Select the <b>Treatment Required</b> for each person entered. The options follow:</p> <ul style="list-style-type: none"> <li>➤ <b>Medical</b></li> <li>➤ <b>First Aid</b></li> <li>➤ <b>Hospitalization</b></li> <li>➤ <b>None</b></li> </ul> <p>Indicate there any further details regarding the injury, illness or death type the information in the <b>Injury/Illness Details</b> text box.</p> <div data-bbox="483 814 1219 1234" data-label="Form"> <p>The screenshot shows a web form titled 'Workplace Violence' with the following fields and options:</p> <ul style="list-style-type: none"> <li>Incident Number: 70000012, Date: 07/23/2010</li> <li>Person Involved: Gerald Parr, Empl ID: 1000031, Empl Rcd Nbr: 0, Date of Birth: 10/21/1940, Date of Death: (blank), Gender: Male</li> <li>Primary Outcome: <input checked="" type="radio"/> Injury, <input type="radio"/> Illness, <input type="radio"/> Death</li> <li>Treatment Required: <input checked="" type="radio"/> Medical, <input type="radio"/> First Aid, <input type="radio"/> Hospitalized, <input type="radio"/> None</li> <li>Occupational Illness: Illness: (text box)</li> <li>Injury/Illness Details: The Member suffered a broken hand.</li> </ul> </div> <ul style="list-style-type: none"> <li>• Click the <b>Save</b> button</li> </ul>
	<p>To proceed, click the <b>Home</b> hyperlink in the top right corner of to return to Portal, <b>WorkLife Program</b> pagelet to continue, or select the <b>Sign Out</b> hyperlink. It is helpful for later activities to write down the incident number.</p>

## How to Add and Manage a Corrective Plan

**Use** The primary purpose of the **Corrective Plan** is to create a plan of action for the Victim (s) and/or the Alleged Offender (s) in response to a Workplace incident.

**Prerequisites** • Incident

**Pages** • Corrective

Step	Action
1	<p>In the <b>WorkLife Program</b> pagelet click on the <a href="#">Identify Corr/Prevent Actions</a> hyperlink to create a <b>Corrective Plan</b> associated with the Incident.</p> <div style="border: 1px solid black; padding: 5px; margin: 10px 0;">  <p>The screenshot shows two pagelets. The top one is titled 'Worklife Program' and contains several links: 'Incident Details', 'Incident/Injury - Member Setup', 'Identify Corr/Prevent Actions' (highlighted with a red box), 'Add/Modify Non-Employee', 'Employee Incident Summary', 'Add Action Request', and 'Report Manager'. The bottom pagelet is titled 'Worklife Reports' and contains 'Case Owner Incidents Report' and 'Member Incidents Report'.</p> </div> <p>Find the Incident Number by entering the Incident Number or Incident Type as <b>Workplace Violence</b>.</p> <div style="border: 1px solid black; padding: 5px; margin: 10px 0;">  <p>The screenshot shows a search form titled 'Identify Corr/Prevent Actions'. It includes instructions: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There is a 'Find an Existing Value' tab. Below it are two dropdown menus: 'Incident Number: begins with' (with an empty text input field) and 'Incident Type: =' (with 'Workplace Violence' selected). At the bottom are 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria' buttons.</p> </div> <ul style="list-style-type: none"> <li>• If known, enter the incident number and click the <b>Search</b> button.</li> <li>• If not known, select Employee Assistance for the <b>Incident Type</b>, leave the <b>Incident Number</b> field blank and click the search button and select the correct incident from the list. This can generate a lot of results, so it is better to have the incident number.</li> </ul>

Step	Action
2	<p>On the <b>Corrective</b> page do the following:</p> <ul style="list-style-type: none"> <li>• Enter the Cause (<b>Hazard</b>) by selecting the  magnifying glass, and select from the list of applicable options for <b>Workplace Violence</b>: <ul style="list-style-type: none"> <li>➤ <b>PND</b> - Pending</li> <li>➤ <b>WVL1</b> – WP Violence – L1</li> <li>➤ <b>WVL2</b> – WP Violence – L2</li> <li>➤ <b>WVL3</b> – WP Violence – L3</li> <li>➤ <b>TBL1</b> - Threat Behavior – L1</li> <li>➤ <b>TBL2</b> - Threat Behavior – L2</li> <li>➤ <b>TBL3</b> - Threat Behavior – L3</li> </ul> </li> </ul> <div data-bbox="446 636 1190 1024" data-label="Image"> <p>The screenshot shows the 'Corrective' page for an incident. At the top, it displays 'Incident Number: 70000012' and 'Date: 07/23/2010'. Below this is a 'Causes' section with a search bar containing 'WVL1' and a magnifying glass icon. The search results show '*Cause: WP Violence - L1'. Below the search bar is a 'Consequent Actions' section with fields for '*Action Sequence: 1', 'Category:', 'Responsible ID:', '*Status: Recommended', and 'Action:'. At the bottom, there is a 'Completion Date' section with 'Estimated:' and 'Actual:' date pickers.</p> </div>

Step	Action
3	<p>Select from the <b>Category</b> by clicking on the down arrow and choose an option associated to the Cause (Step 2):</p> <ul style="list-style-type: none"> <li>➤ <b>EAP Referral</b></li> <li>➤ <b>Other W-L Programs</b></li> <li>➤ <b>Local Security Referral</b></li> <li>➤ <b>Other Law Enforcement Referral</b></li> <li>➤ <b>Military/Civilian Support</b></li> <li>➤ <b>Medical Care</b></li> <li>➤ <b>CGIS</b></li> <li>➤ <b>Legal Services</b></li> <li>➤ <b>Chaplain</b></li> <li>➤ <b>MH Care- Military</b></li> <li>➤ <b>MH Care- Civilian</b></li> <li>➤ <b>Training</b></li> </ul> <div data-bbox="488 787 1219 1178" style="border: 1px solid black; padding: 5px;"> </div> <p>Note: <i>You can have one hazard with Consequent Actions.</i></p> <ul style="list-style-type: none"> <li>• Enter the <b>Responsible ID</b> by clicking on the  magnifying glass icon to select the USCG Member EmplID responsible for the actions entered for each (this step is optional).</li> </ul> <p style="margin-left: 40px;"><i>Note: If the person is someone other than a USCG member, type in the name and information into the <b>Action</b> text box.</i></p> <ul style="list-style-type: none"> <li>• Select the <b>Status</b> field to indicate the status of each Action Sequence. The options are: <ul style="list-style-type: none"> <li>➤ <b>In Progress</b></li> <li>➤ <b>Completed</b></li> <li>➤ <b>Recommended</b></li> <li>➤ <b>Existing</b></li> <li>➤ <b>Planned</b></li> </ul> </li> <li>• Enter the <b>Completion Date</b> information by entering a date (MMDDYYYY) or selecting the calendar icon next to the <b>Estimated</b> and <b>Actual</b> fields.</li> </ul>

**Note:** The EAP incident will remain unresolved and “open” in the system until the **Status** has been set to **Completed**, and the **Actual Completion Date** has been entered.

**Step**

**Action**

3

The screenshot displays a web-based form for managing workplace violence incidents. At the top, it shows 'Incident Number: 70000012', 'Date: 07/23/2010', and 'Workplace Violence'. Below this, there are sections for 'Causes' and 'Consequent Actions'. The 'Consequent Actions' section is currently active and shows a single action with the following details: Action Sequence: 1, Category: Training, Responsible ID: 1000030 (Kenneth Theriault), Status: Recommended, and Action: enter the details of the action being taken for this category... The 'Completion Date' section shows an Estimated date of 07/30/2010 and an empty Actual date field.

- Click on the **Save** button when you have finished with the *Action Sequence 1*.
- To add additional Consequent Actions, select the [+] in the right corner and follow the steps to add a Consequent Action.

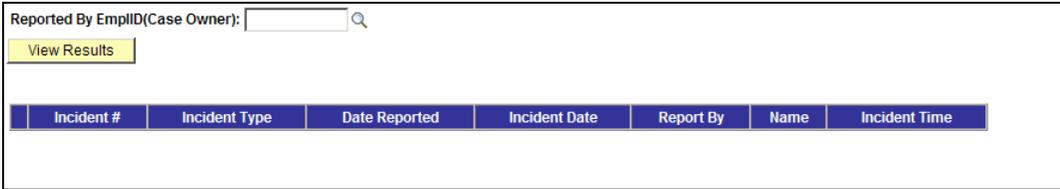
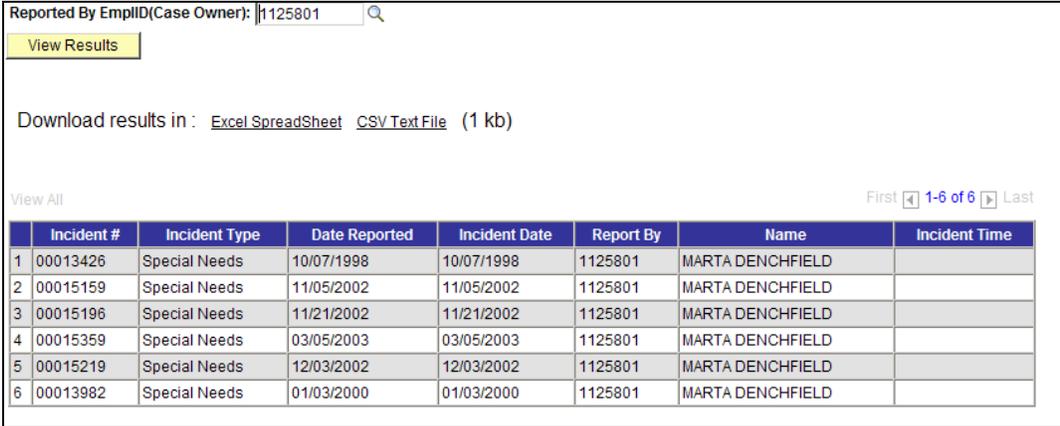
To proceed, click the **Home** hyperlink in the top right corner of to return to Portal, **WorkLife Program** pagelet to continue, or select the **Sign Out** hyperlink. It is helpful for later activities to write down the incident number.

## How to Run a Worklife Report

**Use** Worklife Report hyperlinks are housed in the Worklife Reports pagelet. Click on the hyperlink of the desired report to run and retrieve the output. Descriptions of the reports accessible to the Worklife Family Advocacy User are located below.

- Prerequisites**
- Incident Details
  - Injury
  - Manage Case
  - Correct Plan

Portal Link/Report Title	Description
Case Owner Incidents Report	This query generates a list of Incidents for any given case owner you designate in the parameters. The system will prompt you for an EmplID of the case owner. The case owner is designated by the EmplID that is in the Reported By EmplID field in the Incident Details component on the Notifications page.
Member Incidents Report	This query generates a list of Incidents by members who are associated with an Incident. The system will prompt you for an EmplID of the Member you want to run the report for.

Step	Action
1	<p>In the <b>Worklife Reports</b> pagelet click on the <a href="#">Case Owner Incidents Report</a> hyperlink:</p>  <p>A prompt will pop up in a new window.</p>  <ul style="list-style-type: none"> <li>• Enter the Reported By EmplID (Case Owner):</li> <li>• Click View Results</li> </ul> <p>The report output will display in the following format</p> 

Step	Action
1	<p>In the <b>Worklife Reports</b> pagelet click on the <a href="#">Member Incidents Report</a> hyperlink:</p>  <p>A prompt will pop up in a new window.</p>  <ul style="list-style-type: none"> <li>• Enter the Member EmplID:</li> <li>• Click View Results</li> </ul> <p>The report output will display in the following format</p> 