

HMS User Manual

How to report, find, resolve and report on workplace hazards in HMS: for everyone who uses it, for the safety personnel who review and verify the work, and for the administrators who set it up.

Every function below is described twice: **on the web** (a browser on a computer) and **on mobile** (the HMS Field app on a phone). Where a function is only available in one place, that is stated.

 On the web  On mobile **Role** Who can use it

Screenshots use a sample organization, Riverside Manufacturing. Mobile screenshots show the HMS Field app's own screens at phone size; on your phone they also show its status bar. Your organization's sites, locations and names will differ.

PART 1

Getting started

What HMS is, who can do what, and how to sign in.

What HMS does

Everyone

HMS keeps one register of the hazards at your organization's sites. Each hazard records *where* it is (the site and location, such as **Main Plant › Area 800 › Test Cell T-843**), how serious it is before and after controls, the controls that deal with it, and whether it is open or closed. Reports turn the register into a document you can print, save as PDF or email.

People in the field report hazards the moment they see them, including on a phone with no signal. People doing the work record what they fixed. Safety personnel verify the work, and administrators set up sites, locations and user accounts.

Roles: who can do what

Everyone

Your administrator gives you one role. The menus only show what your role can use. If you need something you can't see, ask your administrator.

Function	Field worker	Approver	Viewer	Analyst	Safety admin	Org admin
View hazards and run reports	✓	✓	✓	✓	✓	✓
Report a hazard	✓	–	–	✓	✓	✓
Add photos to a hazard you reported	✓	–	–	✓	✓	✓
Add a place that isn't listed while reporting	✓	–	–	✓	✓	✓
Update controls assigned to you	✓	✓	–	✓	✓	✓
Resolve hazards: update any control, add a control, rate risk after controls, close and reopen	✓	–	–	✓	✓	✓
Add investigation & follow-up photos	✓	–	–	✓	✓	✓
Do inspections (and raise hazards from findings)	✓	–	–	✓	✓	✓
Manage checklists and inspection schedules; send reminders	–	–	–	–	✓	✓
Write hazard analyses (HA / JHA)	–	–	–	✓	✓	✓
Review hazard analyses	–	✓	–	✓	✓	✓
Approve and sign hazard analyses	–	✓	–	–	✓	✓
Acknowledge approved analyses	✓	✓	–	✓	✓	✓
Verify controls	–	–	–	✓	✓	✓
Remove anyone's photos	–	–	–	✓	✓	✓
Change where a hazard is recorded	–	–	–	✓	✓	✓
Edit a hazard's title, description, cause and impact	–	–	–	✓	✓	✓
Delete a hazard (with a reason)	–	–	–	–	✓	✓
Manage locations and item types; approve or merge places added from the field	–	–	–	–	✓	✓

Function	Field worker	Approver	Viewer	Analyst	Safety admin	Org admin
Add sites	–	–	–	–	–	✓
Set up single sign-on	–	–	–	–	–	✓
Manage users and passwords	–	–	–	–	–	✓

In this manual, **safety personnel** means Analysts and Safety admins, and **administrators** means Org admins. Your organization may rename roles or adjust them.

Starting your organization

New organizations

If your company isn't using HMS yet, you can set it up yourself with a **beta code** from the HMS team. You become the organization's administrator and can then invite your team. If your company already uses HMS, don't start a new organization: ask its administrator to invite you.

1. On the sign-in page, choose **Start your organization** (in the mobile app: **New to HMS? Start your organization**). A link from the HMS team may already include the code.
2. Enter the **Beta code**, your **Company or organization name**, **Your name** and **Work email**, then choose **Email me a link**.
3. Open the email from HMS (check your junk folder if it isn't there within a few minutes). The link works once, for 24 hours.
4. Choose your password (see Your password) and choose **Create my organization**.
5. HMS creates the organization with a first site, **Main site**, and signs you in. It shows your **organization code**, made from the company name, and emails it to you. Everyone in your organization types this code when they sign in.

Start your organization

Set up HMS for your company. You'll be its administrator and can invite your team afterwards.

Beta code

SAFETY-BETA-26

Company or organization name

Northwind Fabrication

Your name

Morgan Lee

Work email

morgan.lee@northwind.test

Email me a link

Already use HMS? [Sign in](#) · [Read the user guide \(PDF\)](#)

Starting an organization with a beta code.

Finish setting up Northwind Fabrication

Hi Morgan Lee. Choose the password for morgan.lee@northwind.test.

Password

At least 12 characters. A few unrelated words make a strong, memorable password.

Confirm password

Create my organization

Choosing a password from the emailed link.

Northwind Fabrication is ready

You're signed in as its administrator.

Your organization code is **northwind-fabrication**. Everyone in your organization types it when they sign in. We've emailed it to you too.

Next steps

1. [Add your locations](#) (buildings, rooms, equipment).
2. [Invite your team](#). They get an email to set their own password.
3. [Report your first hazard](#).

The new organization, its code and the next steps.

Next steps: rename **Main site** or add more sites (Adding sites), add your locations (Managing locations and items), then invite your team.

Already have an HMS account with that email? No second account is made. You get an email saying so, with a link to sign in.

Signing in

Everyone

You sign in with your **organization code** (for example `riverside`; it's in your invitation or welcome email) and then either your **work account** or your email and HMS password. **Sign in with your organization** (single sign-on) appears when your organization has set it up. It uses the same account as your work email, such as Microsoft 365, Google or Okta. Otherwise you set your password from your invitation email, or your administrator gives you a **temporary password**.

ON THE WEB

1. Open the HMS address your administrator gave you.
2. Enter your `Organization`. If a `Sign in with ...` button appears, choose it and sign in with your work account on your organization's page. You come straight back to HMS.
3. Otherwise, enter `Email` and `Password`, then choose `Sign in`.
4. The first time, HMS asks you to **Choose your password** before you can continue (see Your password).

Sign in

Organization

riverside

Sign in with Riverside Microsoft 365

or use your HMS password

Email

theo.brandt@riverside.test

Password

.....

Sign in

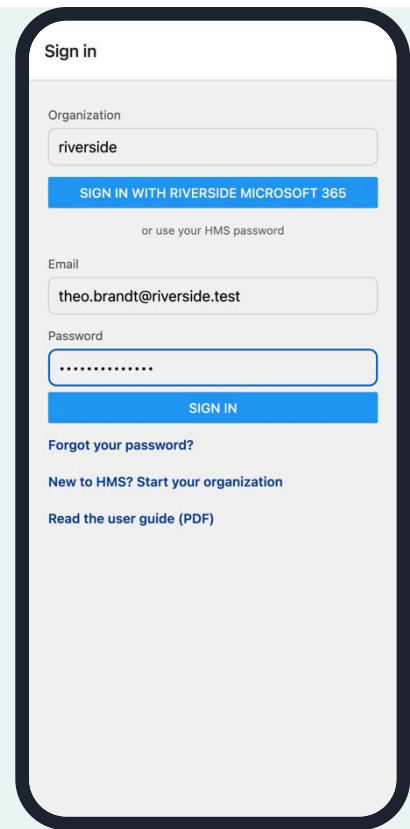
[Forgot your password?](#)

New to HMS? [Start your organization](#) · [Read the user guide \(PDF\)](#)

ON MOBILE

1. Open the **HMS Field** app.
2. Enter your organization. Tap `Sign in with ...` if it appears: your organization's page opens, you sign in there, and you're returned to the app.
3. Otherwise enter your email and password, then tap `Sign in`.
4. With a temporary password, the app shows **Choose your own to continue**. Set it there; it works on the web too.
5. The app keeps you signed in until you sign out or your session ends.

The web sign-in page.

A screenshot of the HMS Field app sign-in interface. The screen is titled "Sign in". It features a form with the following elements: an "Organization" field containing the text "riverside"; a blue button labeled "SIGN IN WITH RIVERSIDE MICROSOFT 365"; a link "or use your HMS password"; an "Email" field containing "theo.brandt@riverside.test"; a "Password" field with masked characters; and a blue "SIGN IN" button. Below the form are three links: "Forgot your password?", "New to HMS? Start your organization", and "Read the user guide (PDF)".

Sign in on the HMS Field app.

Locked out? Five wrong passwords in a row lock the account for 15 minutes. Wait, reset your password by email, or ask your administrator to reset it. Either one also unlocks the account.

Single sign-on only? Some organizations turn HMS passwords off, so the sign-in page shows only the **Sign in with ...** button. Organization admins can still choose **Administrator? Use your password**, so a problem with the provider never locks everyone out.

"Your session has ended." You'll see this if your administrator disabled your account, reset your password, or you changed your password on another device. Sign in again. Sessions also end after 8 hours.

Your password

Everyone

Use at least 12 characters. A few unrelated words make a strong password you can remember. HMS refuses common passwords, a single repeated character, and passwords that contain your name or the start of your email address. It shows these rules as you type.

ON THE WEB

1. Choose **Change password** in the top menu.
2. Enter your **Current password**, then the new one twice.
3. Choose **Save password**. Your other devices are signed out; this one stays signed in.

Change your password

Current password

New password

At least 12 characters. A few unrelated words make a strong, memorable password.

- Use at least 12 characters

Confirm new password

Save password

Change your password: the rules update as you type.

ON MOBILE

The app lets you **set** your password after signing in with a temporary one. To **change** an existing password, use the web. After you change it, the app asks you to sign in again with the new password.

Accepting an invitation

Everyone

When an administrator adds you, HMS emails you an invitation with your organization's name and code.

1. Open the link in the email. It works once, for 7 days.
2. Choose your password and choose **Set password**.
3. Choose **Sign in**. Your organization code is filled in: enter your email and new password. The same password works in the mobile app.

Welcome to Riverside Manufacturing

Hi Sam Rivera, choose a password to finish setting up your account.

New password

.....

At least 12 characters. A few unrelated words make a strong, memorable password.

Confirm new password

Set password

The page an invitation email opens.

Link expired or already used? Ask your administrator to **Resend invitation**, or use Forgot your password? with your organization code.

Forgot your password?

Everyone

You can reset it yourself by email. HMS sends a link that works **once**, for **30 minutes**. Setting a new password signs you out on every device and also unlocks your account if it was locked.

ON THE WEB

1. On the sign-in page, choose **Forgot your password?**
2. Enter your organization and email, and choose **Email me a link**.
3. Open the email *Reset your HMS password* and select the link.
4. Enter your new password twice (the rules show as you type) and choose **Set new password**. Then sign in with it.

Forgot your password?

We'll email you a link to choose a new one.

Organization

riverside

Email

lena.okafor@riverside.test

Email me a link

[Back to sign in](#)

Ask for a reset link.

ON MOBILE

1. On the sign-in screen, tap **Forgot your password?**
2. Check your organization and email and tap **Email me a link**.
3. Open the email on your phone and tap the link; it opens in your browser. Choose the new password there.
4. Come back to the app and sign in with the new password.

The screenshot shows a mobile app interface for the 'Forgot your password?' screen. At the top, it says 'Sign in'. Below that is the title 'Forgot your password?' and a subtext 'We'll email you a link to choose a new one.' There are two input fields: 'Organization' with the value 'riverside' and 'Email' with the value 'theo.brandt@riverside.test'. Below the email field are two buttons: a blue button labeled 'EMAIL ME A LINK' and a grey button labeled 'BACK TO SIGN IN'.

Asking for a reset link on mobile.

Choose a new password

For Lena Okafor at Riverside Manufacturing.

New password

At least 12 characters. A few unrelated words make a strong, memorable password.

Confirm new password

Set new password

The page the emailed link opens.

No email? For privacy, HMS shows the same message whether or not an account matches, so check the spelling of your organization and email, and your junk folder. Only the newest link works, and you can ask for at most 3 links in 15 minutes. If you still can't get in, your administrator can reset your password.

Signing out

Everyone

ON THE WEB

Choose **Sign out** at the right of the top menu. Always sign out on shared computers.

ON MOBILE

Tap **Sign out** at the top right of any tab. If reports you made offline haven't been sent yet, the app tells you how many are waiting. They stay on the phone and send after you sign in again.

PART 2

Finding, reporting and understanding hazards

For everyone who uses HMS.

Browsing hazards

Every hazard shows **where it is**: the site, then the location path with the most specific place in bold, for example **Main Plant > Area 800 > Test Cell T-843**. A task linked to the hazard (an activity, such as "Hydrazine transfer") is shown separately underneath, because it is not a place.

ON THE WEB

1. Choose **Hazards** in the top menu.
2. Narrow the list with **Site**, **Location** and **Status** (Open, Closed or All). Choose a site first to enable the Location list.
3. A location **includes everything inside it**: choosing Area 800 also shows hazards in Test Cell T-843.
4. The list shows 50 at a time; use **Load more** for the rest.
5. Choose a hazard's title to open it.

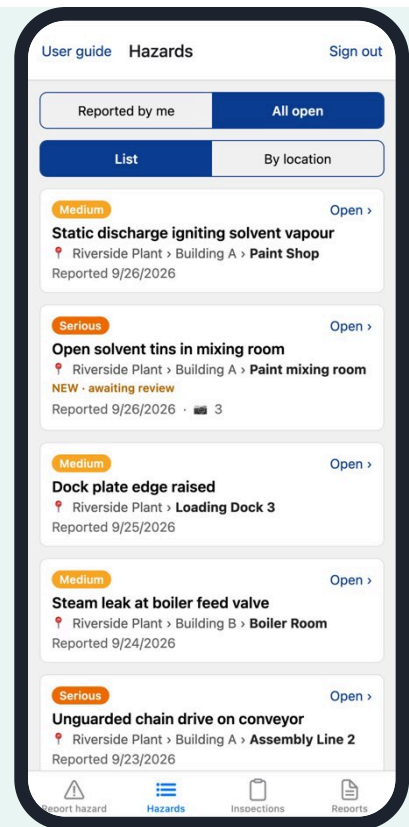
Hazards					
List By location Report hazard					
Site	Location (includes everything inside it)	Status			
Riverside Plant	All locations	Open			
Hazard	Location	Before controls	After controls	Status	Reported
Static discharge igniting solvent vapour Escalate Ungrounded containers or spray guns can spark while vapour is present.	Riverside Plant > Building A > Paint Shop	Medium S2/D	—	open	9/26/2026
Open solvent tins in mixing room Escalate Several solvent tins left open on the bench in the new paint mixing room; no lids nearby.	Riverside Plant > Building A > Paint mixing room New	Serious S3/B	—	open	9/26/2026
Dock plate edge raised Dock plate at Loading Dock 3 sits proud of the trailer bed by about 3 cm.	Riverside Plant > Loading Dock 3	Medium S4/B	—	open	9/25/2026
Steam leak at boiler feed valve Visible steam plume from the packing gland on feed valve FV-2.	Riverside Plant > Building B > Boiler Room	Medium S3/C	—	open	9/24/2026
Unguarded chain drive on conveyor Escalate Guard panel missing from the conveyor chain drive at station 4.	Riverside Plant > Building A > Assembly Line 2	Serious S2/C	—	open	9/23/2026
Solvent vapour build-up in spray booth Escalate Strong solvent odour at the booth exit during the second shift; extraction fan sounded weak.	Riverside Plant > Building A > Paint Shop Task: Solvent drum transfer	High S2/B	Medium S2/D	open	9/20/2026

Hazards filtered to one site. The Location column shows where each hazard is.

ON MOBILE

1. Open the **Hazards** tab. It shows **open** hazards.
2. Switch between **Reported by me** and **All open**.
3. Each card shows the risk, the title and a  line with the site and location.
4. Pull down to refresh. Tap a card to open it.
5. Offline, the tab shows the last list you loaded, marked as offline.

Site and Location filters and closed hazards are on the web only.



The Hazards tab, All open, as a list.

Viewing hazards by location

Everyone

The **By location** view groups hazards under location headings, so you can see at a glance what needs attention in each place. Locations are sorted alphabetically, with sub-locations indented under their parent. Each heading shows the **highest risk** in that location and how many hazards it has. Inside a location, the highest risks come first. Hazards linked only to a task appear under *No specific location*.

ON THE WEB

1. On **Hazards**, choose **By location** next to the page title. Your browser remembers the choice.
2. Sites appear as headings when you view all sites.
3. Choose a location heading to collapse or expand it, or use **Expand all** / **Collapse all**.
4. The Site, Location and Status filters still apply.

The screenshot shows the 'Hazards' page on a web browser. At the top, there are tabs for 'List', 'By location' (selected), and 'Report hazard'. Below the tabs are filters for 'Site' (All sites), 'Location' (Choose a site first), and 'Status' (Open). A summary bar indicates '7 hazards in 6 locations'. The main content is organized by location headings: 'NORTH WAREHOUSE' and 'RIVERSIDE PLANT'. Under 'NORTH WAREHOUSE', there is a heading for 'Racking Aisles' with a 'Serious' risk level and 1 hazard. Below it is a specific hazard: 'Damaged upright in racking aisle 7' (Serious, Open, reported 9/22/2026). Under 'RIVERSIDE PLANT', there are several sub-locations: 'Building A - Assembly Line 2' (Serious, 1 hazard), 'Building A - Paint mixing room' (New - awaiting review, Serious, 1 hazard), 'Building A - Paint Shop' (High, 2 hazards), and 'Loading Dock 3' (Medium, 1 hazard). Each sub-location lists specific hazards with their risk levels and status.

By location: sites as headings, sub-locations indented, highest risk and count on each heading.

ON MOBILE

1. On the **Hazards** tab, choose **By location** (under the Reported by me / All open switch). The phone remembers it.
2. Location headings stay pinned at the top as you scroll, with the highest-risk badge and count.
3. Tap a hazard to open it.

The screenshot shows the 'Hazards' page on a mobile phone. At the top, there are tabs for 'User guide', 'Hazards' (selected), and 'Sign out'. Below the tabs are switches for 'Reported by me' and 'All open'. There are also tabs for 'List' and 'By location' (selected). The main content is organized by location headings: 'NORTH WAREHOUSE' and 'RIVERSIDE PLANT'. Under 'NORTH WAREHOUSE', there is a heading for 'Racking Aisles' with a 'Serious' risk level and 1 hazard. Below it is a specific hazard: 'Damaged upright in racking aisle 7' (Serious, Reported 9/22/2026). Under 'RIVERSIDE PLANT', there are several sub-locations: 'Building A - Assembly Line 2' (Serious, 1 hazard), 'Building A - Paint mixing room (new, awaiting review)' (Serious, 1 hazard), and 'Building A - Paint Shop' (High, 2 hazards). Each sub-location lists specific hazards with their risk levels and status.

By location on mobile, with location headings.

Opening a hazard

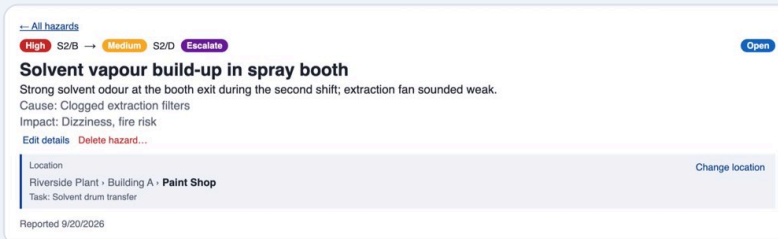
Everyone

A hazard shows its risk before and after controls, an **Escalate** flag if its outcome could be one OSHA requires you to report (fatality, amputation, loss of an eye or hospitalization), its status, description, cause, location, and its controls with who they are assigned to and when they are due.

ON THE WEB

Choose the hazard's title on **Hazards** . Use

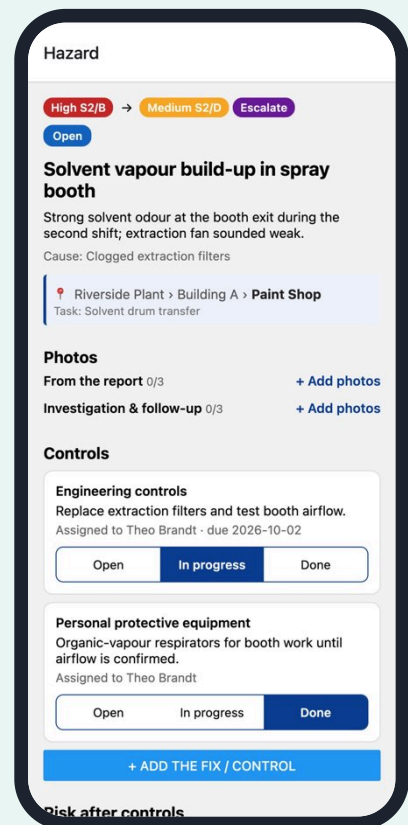
← **All hazards** to go back. What you can change on this page depends on your role (see Part 3).



The top of a hazard: risk before and after controls, status and location.

ON MOBILE

Tap the hazard on the **Hazards** tab. The screen shows the same information, with large buttons for the actions your role allows. Opening a hazard needs a connection.



The same hazard on mobile.

Reporting a hazard

Field worker

Analyst

Safety admin

Org admin

Report anything that could hurt someone, as soon as you see it. Choose where it is, describe it, and rate how bad it could be and how likely it is (see The risk matrix).

ON THE WEB

1. Choose **Report hazard**.
2. Pick the **Site** and the **Location, system, process or task**. Each entry shows its full path, such as *Building A > Paint Shop*. If the place isn't in the list, see When the place isn't listed.
3. Enter a **Title**, **Description** and, if known, the **Cause**.
4. Optionally, under **Photos**, choose **Add photos** and pick up to 3 pictures. Each is shrunk before upload and shows its new size. Use **×** to remove one.
5. Under **Risk before controls**, choose the cell for severity and probability. The required action for that risk level appears below.
6. Optionally **Add control** for measures already in place, then rate the **Risk after controls**.
7. Choose **Save hazard**. The form won't save while a rule is broken; the reason is shown in red.

Report a hazard

Site: Location, system, process or task:

Title:

Description:

Cause:

Photos (optional, up to 3)

Risk before controls

Severity \ Probability	A Frequent	B Probable	C Occasional	D Remote	E Improbable
S1 Catastrophic	High	High	High	Serious	Medium
S2 Critical	High	High	Serious	Medium	Medium
S3 Serious	Serious	Serious	Medium	Medium	Low
S4 Moderate	Serious	Medium	Medium	Low	Low
S5 Minor	Medium	Medium	Low	Low	Low

Controls

ON MOBILE

1. Open the **Report hazard** tab.
2. Under **Where?**, type in the search box (a name, part of a path or a code), or tap **Use my location** to put the nearest areas first. Tap the right one. If it isn't there, tap **+ Not listed? Add it** (see below).
3. Enter a short title and describe what you saw.
4. Tap the severity × probability square under **How bad, how likely?**
5. Optionally add up to 3 photos:  **Take photo** uses the camera, and  **Choose** picks from your photo library (several at once). Tap **×** on a photo to drop it.
6. Tap **Submit report**.

Works without signal. The report is saved on the phone first and sent automatically when you're back online. The Hazards tab shows reports *Waiting to sync*. If the server rejects one, it shows why and you can **Discard** it.

Reporting a hazard on the web, with the risk rated as Moderate / Probable (Medium).

Photos (optional, up to 3)



Up to 3 photos, resized in your browser before they're sent.

User guide Report hazard Sign out

Where?

USE MY LOCATION

dock

Loading Dock 3
Location - DOCK-3 - Riverside Plant

Loading Dock 3 > Forklift 4
Equipment - FL-04 - Riverside Plant

+ Not listed? Add it

What is the hazard?

Pallet wrap on dock floor

Loose pallet wrap near the dock plate

How bad, how likely?

	A	B	C	D	E
S1 Catastrophic					
S2 Critical					
S3 Serious					
S4 Moderate					
S5 Minor					

Report hazard Hazards Inspections Reports

Choose where the hazard is, then describe it.

User guide Report hazard Sign out

Pallet wrap on dock floor

Loose pallet wrap near the dock plate.

How bad, how likely?

	A	B	C	D	E
S1 Catastrophic					
S2 Critical					
S3 Serious					
S4 Moderate					
S5 Minor					

A Frequent - B Probable - C Occasional - D Remote - E Improbable

Photos (optional, up to 3)

Take photo Choose 2/3

SUBMIT REPORT

Report hazard Hazards Inspections Reports

Rate it, add up to 3 photos, and submit.

Before first use on mobile: open the app once with a connection so it can download your sites, locations and risk matrix. **Photos without signal:** they wait on the phone with the report and upload after it, even if the connection drops between them. See Photos.

When the place isn't listed

[Field worker](#)[Analyst](#)[Safety admin](#)[Org admin](#)

New rooms, equipment and work areas appear before anyone adds them to HMS. Don't pick something "close enough" and don't hold back the report: add the place as part of the report. It's saved with your hazard, marked **New · awaiting review**, and a safety reviewer confirms it, corrects it or merges it with an existing entry (see Reviewing places added from the field).

ON THE WEB

1. On **Report hazard**, open the **Location, system, process or task** list and choose **+ Not listed – add it...** at the bottom.
2. In **Add the place**, enter its **Name** and choose **What is it?** (Location, System, Equipment and so on).
3. Optionally choose what it is **Inside**, such as the building a new room is in. Leave it as *Directly in the site* if you're not sure.
4. Finish the report as usual and choose **Save hazard**.

Report a hazard

Site: Riverside Plant

Location, system, process or task: + Not listed – add it...

Add the place

It is saved with your report and marked *awaiting review* until a safety reviewer confirms it.

Name: Compressor room

What is it?: Location

Inside (optional): Building B

Title: Air hose across walkway

Adding a place that isn't listed while reporting.

ON MOBILE

1. No match in **Where?** Tap **+ Not listed? Add it**. Your search becomes the name.
2. Tap what it is, and optionally the building or area it's in.
3. Finish and tap **Submit report**.

User guide Report hazard Sign out

Where?

USE MY LOCATION

Add a place that isn't listed

It is sent with your report and marked "awaiting review" until the safety team confirms it.

Compressor

What is it?

Location System Process

Equipment

Inside (optional): tap one below

Building B X

BACK TO THE LIST

What is the hazard?

Air hose across walkway

Describe what you saw

How bad, how likely?

A B C D E

S1 Catastrophic

Report hazard Hazards Inspections Reports

Adding a place on mobile.

On mobile: this works offline; the new place is created when the report syncs. Tap **x** to clear the parent, or **Back to the list** to cancel the new place. If you have more than one site and choose no parent, tap the site. **Duplicates:** if someone else already added the same name in the same

spot, your report joins that entry instead of creating a duplicate. New places show in lists with *(new)* until they're reviewed, so colleagues can report against them too.

The risk matrix

Everyone

Risk combines **severity** (how badly someone could be hurt) and **probability** (how likely it is).

Rate the realistic worst outcome.

Severity	Meaning
S1 Catastrophic	Fatality, permanent total disability, or irreversible illness
S2 Critical	Permanent partial disability, amputation, loss of an eye, or in-patient hospitalization
S3 Serious	Days away from work, or restricted or transferred duty
S4 Moderate	Medical treatment beyond first aid, no lost workday
S5 Minor	First aid only

Probability: **A** Frequent · **B** Probable · **C** Occasional · **D** Remote · **E** Improbable · **F** Eliminated
(after controls only).

Severity	A	B	C	D	E	F
S1	High	High	High	Serious	Medium	Eliminated
S2	High	High	Serious	Medium	Medium	Eliminated
S3	Serious	Serious	Medium	Medium	Low	Eliminated
S4	Serious	Medium	Medium	Low	Low	Eliminated
S5	Medium	Medium	Low	Low	Low	Eliminated

Level	What it means	Who can accept it
High	Do not start the work, or stop it. Re-design or add controls first.	Site director or senior management
Serious	Add controls under a dated plan; check interim controls before work.	Department or program manager
Medium	Acceptable with review. Confirm controls are in place and working.	Supervisor or manager
Low	Acceptable. Follow normal procedures.	Supervisor or worker

Hazards rated **S1 or S2** before controls get the **Escalate** flag. Your organization's matrix may differ; HMS always shows the one in use.

ON THE WEB

The matrix appears as a clickable colored grid when you report a hazard or rate the risk after

ON MOBILE

The same grid appears as large colored squares. Rows are labelled S1–S5 and

controls. Hover a row or column heading to read its definition.

columns A–F, with a key underneath. Tap a square to choose it.

Site hazard report

Everyone

A report of every hazard at one site, grouped by location and sorted alphabetically by location. It includes risks, controls, **photo thumbnails** (labelled *Report* or *Follow-up*) and a summary by risk level.

ON THE WEB

1. Choose **Reports**.
2. Pick the **Site** and what to **Include** (open, closed or all hazards), then **Generate report**.
3. **Print**: prints the report. Choose "Save as PDF" as the printer to save it instead.
4. **Download PDF**: saves a formatted PDF named by site and date, for example **hazard-report-MAIN-2026-09-25.pdf**.
5. **Email**: enter up to 10 addresses (your own is filled in) and an optional message, then send. The PDF is attached and replies go to you.

Site hazard report

Every hazard at a site, grouped by location and sorted alphabetically by location.

Site: **Riverside Plant** Include: **All hazards** **Generate report**

Print **Download PDF** **Email**

RIVERSIDE MANUFACTURING

Site Hazard Report: Riverside Plant

Site code RIV - All hazards, sorted by location - Generated Oct 2, 2026, 7:49 PM by Priya Natarajan

7 hazards across 6 locations - 3 with OSHA-reportable outcome potential (S1/S2)

High: 1 **Serious: 2** **Medium: 4**

Building A - Assembly Line 2

Location - A-ASM2

Serious S2/C **Escalate**

open - reported Sep 23, 2026 by Theo Brandt

Unguarded chain drive on conveyor

Guard panel missing from the conveyor chain drive at station 4.

Cause: Guard removed for maintenance and not refitted

No controls recorded.

Medium S4/B → **Eliminated S4/F**

closed - eliminated - reported Sep 25, 2026 by Theo Brandt

Oil spill on walkway near line 2

Oil puddle across the yellow walkway beside Assembly Line 2.

Cause: Leaking hydraulic fitting

• **Elimination**: Cleaned up the spill and replaced the leaking hydraulic fitting. (done, Theo Brandt)

Building A - Paint mixing room

Location - NEW-7QK2M

Serious S3/B

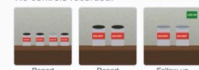
open - reported Sep 26, 2026 by Theo Brandt

Open solvent tins in mixing room

Several solvent tins left open on the bench in the new paint mixing room; no lids nearby.

Cause: Lids not replaced after mixing

No controls recorded.



A generated site report with the Print, Download PDF and Email actions.

ON MOBILE

1. Open the **Reports** tab.
2. Tap the site and choose **Open**, **Closed** or **All**.
3. **Share PDF (print, email, save)** opens the phone's share sheet. From there you can print to a nearby printer, send it with your email or messaging app, or save it to Files.
4. Or enter addresses and tap **Email report** to have HMS send it.

The report is not shown on screen on mobile; open the PDF instead.

Site hazard report

Every hazard at a site, grouped by location and sorted alphabetically by location.

Site: Include:

To (separate addresses with commas, up to 10):

Message (optional):

The report is attached as a PDF. Replies go to you. Sending is recorded in the audit log.

Emailing the report: your address is filled in; add others and a message.

User guide Reports Sign out

Every hazard at a site, grouped by location and sorted alphabetically.

Site:

Include:

Or email it from HMS:

Report hazard Hazards Inspections Reports

The Reports tab: choose a site, then share or email the PDF.

Photos in reports appear as small square thumbnails, about 1 inch wide, so the file stays small enough to email. To see a photo in full, open the hazard in HMS; on the web report, selecting a thumbnail opens its hazard. For a very large site, thumbnails stop once they reach about 8 MB, and the report says how many photos weren't included.

Handle with care. Reports can contain sensitive safety information, including photos. Every emailed report is recorded with its recipients, and you can send up to 10 report emails an hour.

PART 3

Resolving hazards

For field workers, safety personnel and anyone else who fixes hazards. Approvers can update controls assigned to them.

Updating a control's status

Field worker

Approver (own)

Analyst

Safety admin

Org admin

Each control moves through **Open** → **In progress** → **Done** → **Verified**. Mark a control *Done* when the work is finished. Only safety personnel can mark it *Verified* after checking it (see Verifying controls). Approvers can only update controls assigned to them.

ON THE WEB

Open the hazard. In **Controls**, change the **Status** dropdown on the control. It saves immediately and shows *Control updated*.

Controls

Control	Assigned to	Due	Status
Engineering controls Replace extraction filters and test booth airflow.	Theo Brandt	2026-10-02	In progress
Personal protective equipment Organic-vapour respirators for booth work until airflow is confirmed.	Theo Brandt	—	Done

Controls with their status dropdowns.

ON MOBILE

Open the hazard. Under each control, tap **Open**, **In progress** or **Done**. The selected state is highlighted and saves immediately. Needs a connection.

The mobile app interface displays a 'Hazard' screen. Under the 'Controls' section, there are two control cards. Each card shows the control name, description, and assigned person. Below each card are three buttons: 'Open', 'In progress', and 'Done'. The 'In progress' button is highlighted for the first control, and the 'Done' button is highlighted for the second control. Below the controls is a blue button labeled '+ ADD THE FIX / CONTROL'. Under the 'Risk after controls' section, there is a risk matrix with columns A (Frequent), B (Probable), C (Occasional), D (Remote), E (Improbable), and F (Eliminated). The matrix shows risk levels from S1 (Catastrophic) to S5 (Minor). The current risk level is S2 Critical, highlighted with a yellow border. Below the matrix is a 'SAVE RATING' button.

Controls on mobile: tap Open, In progress or Done.

Someone else changed it? If a colleague updated the same hazard a moment before you, HMS refuses your change and reloads. Check the new state and try again.

Recording a fix: adding a control

[Field worker](#)[Analyst](#)[Safety admin](#)[Org admin](#)

If you fixed something on the spot, record what you did as a control. Choose the most effective type that describes it:

Type	What it means	Can lower severity?
1. Elimination	The hazard is physically removed	Yes
2. Substitution	Replaced with something less hazardous	Yes
3. Engineering controls	Guards, interlocks, ventilation, shielding	No, only probability
4. Administrative controls	Procedures, training, warnings, permits	No, only probability
5. Personal protective equipment	Gloves, face shields, respirators	No, only probability

ON THE WEB

Open the hazard. In **Add a control**, choose the **Type**, describe **What was (or will be) done** and choose **Add control**.

Add a control

Type

1. Elimination

What was (or will be) done

Add control

Adding a control on the web.

ON MOBILE

Open the hazard and tap **+ Add the fix / control**. Tap the type, describe what was done, then tap **Add control**.

Hazard

Investigation & follow-up 0/3 [+ Add photos](#)

Controls

Engineering controls
Replace extraction filters and test booth airflow.
Assigned to Theo Brandt - due 2026-10-02

Open In progress Done

Personal protective equipment
Organic-vapour respirators for booth work until airflow is confirmed.
Assigned to Theo Brandt

Open In progress Done

What was done?

Elimination Substitution

Engineering controls Administrative controls

Personal protective equipment

e.g. Cleaned up the spill and fixed the leaking fitting

ADD CONTROL

Risk after controls

	A	B	C	D	E	F
S1 Catastrophic						
S2 Critical						

Recording a fix on mobile: choose the type and describe what was done.

Controls you add as a field worker are assigned to you. Safety personnel add controls unassigned.

Photos

Everyone

A hazard can have **up to 3 photos from the report** and **up to 3 from the investigation and follow-up**, such as close-ups found while investigating or a picture of the fix. Everyone who can see the hazard can see its photos.

- **Report photos** can be added by the person who reported the hazard, when reporting or later on the hazard page.
- **Investigation & follow-up photos** can be added by safety personnel and by anyone who can resolve hazards, including field workers who fixed it.
- You can remove photos you added. Safety personnel can remove any photo. Photos can't be added or removed while a hazard is closed; reopen it first.

ON THE WEB

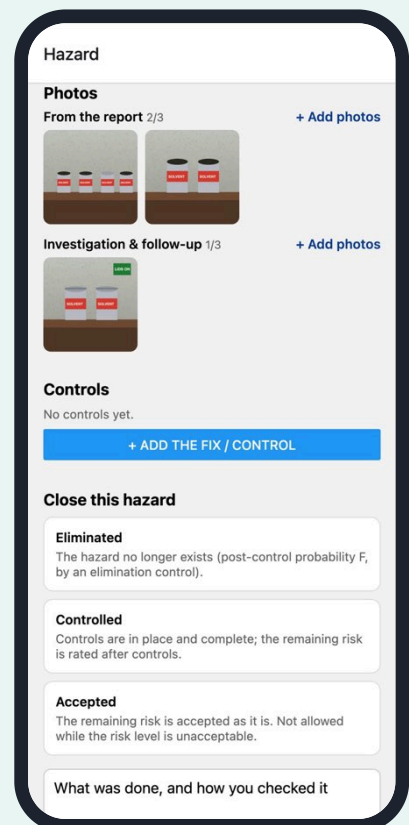
1. Open the hazard. The **Photos** panel shows both groups and how many of the 3 each uses.
2. Select a photo to see it full size, with who added it and when. Press **Esc** or **Close** to go back. **Open original** opens it in a new tab.
3. To add, choose **+ Add photos** next to the group, pick your pictures, and choose **Upload**.
4. To remove, open the photo and choose **Remove**.

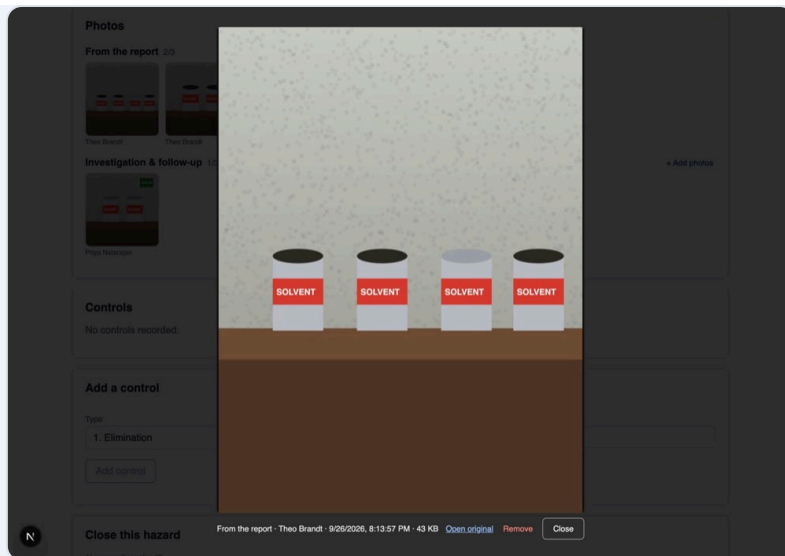


Report photos and a follow-up photo showing the fix.

ON MOBILE

1. Open the hazard and scroll to **Photos**.
2. Tap a photo to see it full screen. Tap **Close**, or **Remove** if it's yours.
3. To add, tap **+ Add photos**, take or choose pictures, then tap **Upload photos**. This needs a connection.





A photo opened full size.

Photos on the hazard screen.

Photos are resized automatically to save space and mobile data. Your phone or browser shrinks each picture before sending it, and HMS then stores it at no more than 1600 pixels on its longest side. That's still sharp enough to read a label or a gauge. A 3–12 MB camera photo typically ends up around 150–400 KB, with a small preview for lists. HMS also removes the hidden details cameras embed, such as the GPS position and phone model. Hazards with photos show 📷 and a count in the hazard lists.

Rating the risk after controls

Field worker

Analyst

Safety admin

Org admin

Once controls are in place, rate the risk that *remains*. HMS checks the rating against the controls:

- Severity can only go down with an **Elimination** or **Substitution** control. PPE doesn't make an injury less severe, only less likely.
- Probability **F (Eliminated)** needs an Elimination control.
- The rating after controls can't be worse than before.

ON THE WEB

Open the hazard. In **Risk after controls**, choose the cell and then **Save rating**. This appears once the hazard has at least one control.

Risk after controls

Severity \ Probability	A Frequent	B Probable	C Occasional	D Remote	E Improbable	F Eliminated
S1 Catastrophic	High	High	High	Serious	Medium	Eliminated
S2 Critical	High	High	Serious	Medium	Medium	Eliminated
S3 Serious	Serious	Serious	Medium	Medium	Low	Eliminated
S4 Moderate	Serious	Medium	Medium	Low	Low	Eliminated
S5 Minor	Medium	Medium	Low	Low	Low	Eliminated

Medium Acceptable with review. Confirm controls are in place and effective; review periodically.

Save rating

Rating the risk after controls, then Save rating.

ON MOBILE

Open the hazard, scroll to **Risk after controls**, tap the square and then **Save rating**. It appears once the hazard has at least one control.

Closing a hazard

Field worker

Analyst

Safety admin

Org admin

Close a hazard when it has been dealt with. Choose how it was resolved and write a short note saying what was done and how you checked it. HMS lists anything still missing and won't close the hazard until the record supports your choice:

Resolved as	Needs
Eliminated	Risk after controls rated F (Eliminated), an Elimination control, and every control Done or Verified
Controlled	At least one control, a risk-after-controls rating, and every control Done or Verified
Accepted	The remaining risk is not <i>High</i> . High risk must be reduced first.

ON THE WEB

1. Open the hazard and scroll to **Close this hazard**.
2. Choose **Eliminated** , **Controlled** or **Accepted** .
Anything missing appears in red.
3. Write the **Resolution note** .
4. Choose **Close hazard** . The status changes to *Closed*, with your name, the time and your note.

Close this hazard

How was it resolved?

- ☐ **Eliminated**
The hazard no longer exists (post-control probability F, by an elimination control).
- ☒ **Controlled**
Controls are in place and complete; the remaining risk is rated after controls.
- ☐ **Accepted**
The remaining risk is accepted as it is. Not allowed while the risk level is unacceptable.

Resolution note

Valve repacked and tested at operating pressure.

- Rate the risk after controls first
- Mark all controls done or verified (1 still open)

Close hazard

Closing as Controlled: HMS lists what is still missing and keeps Close hazard disabled.

ON MOBILE

1. Open the hazard and scroll to **Close this hazard**.
2. Tap how it was resolved.
Anything missing is listed in red.
3. Describe what was done and how you checked it.
4. Tap **Close hazard** . The app confirms: *Hazard closed. Thank you!*

Closing needs a connection.

Hazard

S2 Critical	Red	Red	Orange	Orange	Yellow	Yellow	Green	Blue
S3 Serious	Orange	Orange	Orange	Orange	Yellow	Yellow	Green	Blue
S4 Moderate	Orange	Orange	Orange	Orange	Yellow	Yellow	Green	Blue
S5 Minor	Orange	Orange	Orange	Orange	Yellow	Yellow	Green	Blue

A Frequent · B Probable · C Occasional · D Remote · E Improbable · F Eliminated

SAVE RATING

Close this hazard

Eliminated
The hazard no longer exists (post-control probability F, by an elimination control).

Controlled
Controls are in place and complete; the remaining risk is rated after controls.

Accepted
The remaining risk is accepted as it is. Not allowed while the risk level is unacceptable.

What was done, and how you checked it

- Rate the risk after controls first
- Mark all controls done or verified (1 still open)

CLOSE HAZARD

The same check on mobile.

Quick fix example: you find an oil spill, clean it up and fix the leaking fitting. Report it (or open it), add an *Elimination* control "Cleaned up the spill and fixed the leaking fitting", mark it *Done*, rate the risk after controls as *F*, then close it as *Eliminated*.

Reopening a hazard

Field worker

Analyst

Safety admin

Org admin

Reopen a hazard if it comes back or was closed too early. A closed hazard can't be changed until it is reopened. Reopening clears how it was resolved and needs a reason.

ON THE WEB

Open the closed hazard. Under **Status:** **closed**, enter the Reason for reopening and choose Reopen hazard .

ON MOBILE

On a closed hazard, type why in Why reopen it? and tap Reopen hazard . This works right after you close a hazard, while it is still on screen. The Hazards tab lists open hazards only, so to reopen an older closed hazard, use the web.

For safety personnel

Analysts and Safety admins: checking the work, watching the serious hazards, and keeping the location catalogue accurate. Everything in Parts 2 and 3 applies to you too.

Verifying controls

Analyst Safety admin Org admin

When someone marks a control *Done*, check that it is in place and effective, then mark it **Verified**. HMS records who verified it and when. Only safety personnel see the Verified option.

ON THE WEB

Open the hazard and set the control's **Status** to **Verified**.

ON MOBILE

Open the hazard. For safety personnel, the control buttons include **Verified**; tap it on site after checking the control.

Watching serious and escalated hazards

Analyst Safety admin Org admin

Hazards with an S1 or S2 outcome carry the **Escalate** flag. Check them promptly against your reporting obligations and your organization's procedures.

ON THE WEB

- Use **By location**: each heading shows the highest risk in that location, so High and Serious areas stand out.
- Generate the **Reports** site report: the summary counts hazards by risk level and escalations, and it can be emailed to managers.

ON MOBILE

- On the Hazards tab, choose **All open** and **By location** to see each location's highest risk while on site.
- Use the **Reports** tab to share the site report from your phone.

Changing where a hazard is recorded

[Analyst](#)[Safety admin](#)[Org admin](#)

During review or investigation you may find a report was filed against the wrong place, too broad an area (the whole building rather than the pump room), or a new place that turns out to be part of an existing one. Re-point it so filters, the By location view and site reports stay accurate. You can choose more than one place or task. The change and your reason are kept in the audit log.

ON THE WEB

1. Open the hazard and choose **Change location** in the Location box.
2. Search the site and tick every place or task the hazard applies to. Untick the wrong ones.
3. Enter a **Reason for the change** and choose **Save location**.

The screenshot shows a web browser view of a hazard report titled "Open solvent tins in mixing room". The report details include the cause ("Lids not replaced after mixing") and impact ("Vapour inhalation, fire"). Below the report, there is a section for "Where is this hazard?" with a search bar containing "paint". Two locations are listed: "Building A > Paint mixing room" (marked with a checkmark and "NEW - awaiting review") and "Building A > Paint Shop" (marked with a checkmark and "A-P-A-I-N-T"). A text box for "Reason for the change" contains the text "Mixing room is part of the Paint Shop". At the bottom, there are "Save location" and "Cancel" buttons. The report is dated "Reported 9/26/2026".

Re-pointing a hazard at the Paint Shop, with a reason.

ON MOBILE

1. Open the hazard and tap **Change location** under its location.
2. Search, then tap places to tick (☒) or untick (☐) them.
3. Enter the reason and tap **Save location**.

The screenshot shows a mobile app view of the same hazard report. The "Where is this hazard?" section has a search bar with "paint". Two locations are listed: "Building A > Paint mixing room (new)" (checked) and "Building A > Paint Shop" (checked). A text box for "Where is this hazard?" contains the text "Part of the Paint Shop". Below this are "SAVE LOCATION" and "CANCEL" buttons. The "Photos" section shows "From the report 2/3" with two photo thumbnails. At the bottom, it says "Investigation & follow-up 1/3" and has a "+ Add photos" button.

Changing a hazard's location on mobile.

Field workers can't change a hazard's location. If they spot a mistake, they tell a safety reviewer. If someone changed the hazard since you opened it, saving is refused. Reload and try again.

Doing an inspection

Field worker

Analyst

Safety admin

Org admin

An inspection works through a **checklist** at a location or item. Answer every question **Pass**, **Fail** or **N/A**. Every fail becomes a **finding**, and you can add a photo and a note to it. To make a finding a hazard straight away, tick **Raise a hazard now** and rate it; the hazard is recorded at the inspected place and linked to the inspection. Completing a scheduled inspection books the next one automatically.

ON THE WEB

1. Choose **Inspections**. **Due** lists overdue inspections and those due in the next 30 days; choose **Start**. Or choose **Start an inspection** and pick the checklist and place.
2. Answer each question. For a fail, say what's wrong, optionally add a photo and tick **Raise a hazard now** with its severity and probability.
3. Add a summary if you like and choose **Complete inspection**.
4. Under **Done**, open an inspection to see its answers, findings and photos. **Raise a hazard...** turns any remaining finding into a hazard later.

The screenshot shows the 'Inspections' section of a web application. At the top, there are tabs for 'Inspections', 'Due (2)', 'Done', and 'Checklists & schedules'. A 'Start an inspection' button is in the top right. Below the tabs, it says 'Generate upcoming (next 30 days)'. There are two sections: 'Overdue (1)' and 'Pending: next 30 days (1)'. Each section contains a table with columns for 'Due', 'Inspection', 'Where', and 'Responsible'. In the 'Overdue' section, there is one entry for '2026-09-22' for a 'Monthly fire extinguisher check' at 'Riverside Plant - Building A - Paint Shop' by 'Theo Brandt'. In the 'Pending' section, there is one entry for '2026-10-06' for the same check at 'Riverside Plant - Building B - Boiler Room' by 'Theo Brandt'. Each row has a 'Start' button and a 'Remind' link.

Due	Inspection	Where	Responsible
2026-09-22	Monthly fire extinguisher check Fire code	Riverside Plant - Building A - Paint Shop	Theo Brandt
2026-10-06	Monthly fire extinguisher check	Riverside Plant - Building B - Boiler Room	Theo Brandt

What's due, overdue first.

ON MOBILE

1. Open the **Inspections** tab. **My inspections due** shows yours, overdue first. Tap one, or **Start an inspection** for any checklist and place.
2. Tap **Pass**, **Fail** or **N/A** for each question. For a fail, say what's wrong, take a photo, and switch on **Raise a hazard now** if needed.
3. Tap **Complete inspection**.

Works without signal. The inspection and its photos are saved on the phone and sent when you're back online, like a hazard report. Open the app with a connection once so it downloads the checklists and your due list.

[← Inspections](#)

Monthly fire extinguisher check

Riverside Plant > Building A > Paint Shop · due 2026-09-22 (**overdue**)

4 of 4 answered

1. Extinguisher in its marked place and unobstructed

Pass Fail N/A

Note (optional)

2. Pressure gauge in the green

Pass **Fail** N/A

Needle just below the green band

 Add a photo
0/1

☐ Raise a hazard now

3. Tamper seal and pin intact

Pass Fail N/A

Note (optional)

4. Inspection tag signed within the last month

Pass Fail N/A

Note (optional)

Summary (optional)

Complete inspection

Answering the checklist.

[← Inspections](#)

Monthly fire extinguisher check

Riverside Plant > Building A > Assembly Line 2 · by Priya Natarajan on 9/26/2026, 8:15:09 PM

One extinguisher missing its tamper seal; replaced from stores.

1. Extinguisher in its marked place and unobstructed

Pass

2. Pressure gauge in the green

Pass

3. Tamper seal and pin intact

Seal missing on the unit by the line 2 exit

Fail

Raise a hazard...

4. Inspection tag signed within the last month

Pass

A completed inspection.

[User guide](#) [Inspections](#) [Sign out](#)

Start an inspection

My inspections due

Overdue (1)

Monthly fire extinguisher check

Riverside Plant > Building A > Paint Shop

Overdue since 2026-09-22

Next 30 days (1)

Monthly fire extinguisher check

Riverside Plant > Building B > Boiler Room

Due 2026-10-06

[Report hazard](#) [Hazards](#) [Inspections](#) [Reports](#)

My inspections due.

Inspection

Monthly fire extinguisher check

Riverside Plant > Building A > Paint Shop · due 2026-09-22

4 of 4 answered

1. Extinguisher in its marked place and unobstructed

Pass Fail N/A

Note (optional)

2. Pressure gauge in the green

Pass **Fail** N/A

What's wrong?

 Take photo  Choose 0/1

☐ Raise a hazard now

3. Tamper seal and pin intact

Pass Fail N/A

Note (optional)

4. Inspection tag signed within the last month

Pass Fail N/A

Note (optional)

Answering on the phone.

Checklists and inspection schedules

Safety admin

Org admin

A **checklist** is an ordered list of questions. A **schedule** says which checklist is done where, how often, and who is responsible. HMS keeps the next inspection of each schedule booked, and it books the following one as soon as that one is completed.

ON THE WEB

1. Choose **Inspections**, then **Checklists & schedules**.
2. **+ New checklist**: name it and add questions; ↑ reorders and × removes. **Edit** changes a checklist later; past inspections keep the questions as they were answered.
3. **New schedule**: choose the checklist, site and place, how often (*every N days, weeks, months or years*), the first due date, who is responsible and why. Then choose **Add schedule**.
4. On **Due**, **Generate upcoming** books everything due in the next 30 days, and **Remind** emails the responsible person. **Stop** ends a schedule and cancels its open inspections.

Inspections

Due (2)DoneChecklists & schedules

Start an inspection

Checklists

Monthly fire extinguisher check

4 question(s)

+ New checklist

EditRemove

Schedules

Monthly fire extinguisher check · Riverside Plant · Building A · Paint Shop

Every month · next 2026-10-22 · Theo Brandt · Fire code

Stop

Monthly fire extinguisher check · Riverside Plant · Building B · Boiler Room

Every 3 months · next 2027-01-06 · Theo Brandt

Stop

New schedule

Checklist

Choose...

Site

North Warehouse

Location or item

The whole site

Every

1

months

First due

10/03/2026

Responsible

Anyone who can inspect

Reason (optional)

e.g. Fire code

Add schedule

Checklists and schedules.

ON MOBILE

Checklists and schedules are managed on the web.

People responsible for an inspection see it under **My inspections due** in the app. Inspections without anyone responsible appear for everyone who can inspect.

Hazard analyses: writing, review and approval

Analyst

Approver

Safety admin

Org admin

A **hazard analysis (HA)** documents an operation or system: written sections (purpose, scope, description of operations, references) plus a **worksheet** of its hazards grouped by analysis, such as a system or subsystem. A **job hazard analysis (JHA)** is the same, with the worksheet grouped by **job task**. The worksheet lists real HMS hazards, with their risk ratings, controls and photos.

Every analysis follows the same path: **Draft** → **In review** (optional) → **Awaiting approval** → **Approved**. A denial returns it to Draft with the reason. To change an approved analysis, start a **revision**; when the revision is approved, the old one becomes **Superseded**.

ON THE WEB

1. **Write:** choose **Analyses**, then **New document**. Pick HA or JHA, the title, the site and what it covers. HMS numbers it, for example HA-2026-001.
2. Fill in the sections and **Save** each one.
+ Add section adds your own.
3. Under **Worksheet**, choose **+ Add a hazard**. Enter the analysis name (HA) or pick the task (JHA), then describe a new hazard with its severity and probability, or pick an existing one. New hazards are recorded against the document and its location. Add controls on the hazard's own page.
4. Under **Reviewers and approvers**, choose **Change**. Reviewers are optional; every approver must approve.
5. **Send for review** (optional), then **Send for approval**. The people you chose get an email.
6. **Review:** reviewers read, add **Comments** (on the whole document or a section), and choose **Mark as reviewed**. The owner answers comments and marks them resolved.
7. **Approve:** approvers see **Your approval**. Re-enter your password, or if you sign in with single sign-on, type your full name. Then choose **Approve and sign**. Or enter a reason and choose **Deny**.

ON MOBILE

Writing, reviewing and approving analyses are on the web.

Hazards added from an analysis appear in the app like any other hazard, and workers can update their controls and add photos on the phone. The approval email's link opens the analysis in the phone's browser.

Hazard analyses

[New document](#)

Hazard analyses (HA) and job hazard analyses (JHA): written up, reviewed, approved with a signature, and acknowledged by the people who work to them.

Type	Status				
All types	All	☐ Mine (owner, reviewer or approver)			
Document	Status	Site	Owner	Hazards	
Paint shop spray operations HA-2026-001 · Hazard analysis	Awaiting approval	Riverside Plant	Priya Natarajan	3	

Hazard analyses, with anything waiting on you first.

Worksheet

Analysis: Spray booth	2
Solvent vapour build-up in spray booth Riverside Plant · Building A · Paint Shop Task: Solvent drum transfer	High → Medium
Static discharge igniting solvent vapour Riverside Plant · Building A · Paint Shop	Medium
Analysis: Mixing and storage	1
Open solvent tins in mixing room Riverside Plant · Building A · Paint mixing room	New · awaiting review Serious

The worksheet lists real HMS hazards.

Your approval

Approving signs this exact version (v6, fingerprint 4b1a588afb2e). Confirm it's you:

Your password

I sign in with single sign-on (no HMS password)

[Approve and sign](#)

Or deny, with a reason (it goes back to the owner as a draft)

e.g. Controls missing for the vapour hazard

[Deny](#)

Approving signs this exact version.

Signatures you can trust. Each review, approval and denial is a signature. It is tied to the document's exact content (version number and a SHA-256 fingerprint) and to how the person proved who they were. Signatures can't be changed or deleted, and the **Sign-off history** on the document lists them. Content is locked while awaiting approval and once approved. An owner can't approve their own document.

Acknowledging an approved analysis

[Field worker](#) [Approver](#) [Analyst](#) [Safety admin](#) [Org admin](#)

When your supervisor asks you to read an analysis for work you do, open it under **Analyses** on the web, read it, and choose **I have read and understood this**. HMS records it against that version. If the analysis is revised, you're asked to acknowledge the new version.

Correcting or deleting a hazard

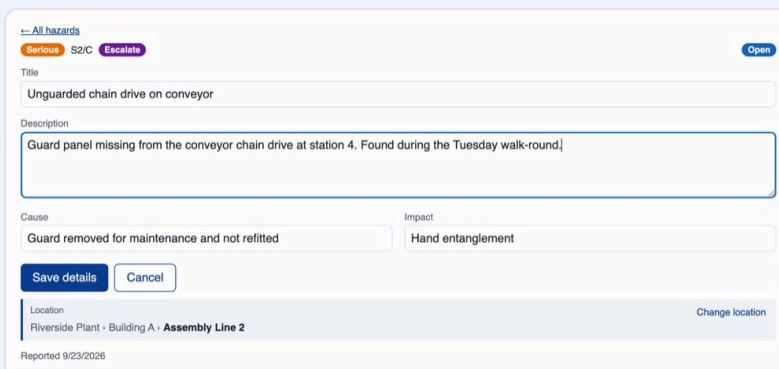
[Analyst](#)[Safety admin](#)[Org admin](#)

Edit details fixes what a report says, such as a typo, a vague title or a missing cause. Analysts, safety admins and org admins can edit a hazard's title, description, cause and impact. Every change is logged with the old and new text.

Delete is for hazards reported by mistake or twice; only safety admins and org admins can do it, and a reason is required. A deleted hazard disappears from lists, reports and phones, but its details, controls, photos and history are kept. For a real hazard that has been dealt with, close it instead.

ON THE WEB

1. Open the hazard. Under the description, choose **Edit details**, make your changes and choose **Save details**.
2. To delete, choose **Delete hazard...**, enter the **Reason**, and choose **Delete hazard**. You return to the hazard list, which confirms the deletion.



--- All hazards

Serious S2/C Escalate Open

Title

Unguarded chain drive on conveyor

Description

Guard panel missing from the conveyor chain drive at station 4. Found during the Tuesday walk-round.

Cause

Guard removed for maintenance and not refitted

Impact

Hand entanglement

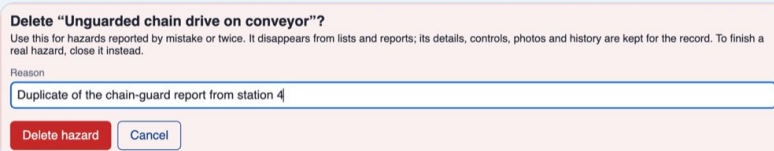
Save details Cancel

Location

Riverside Plant - Building A - Assembly Line 2 Change location

Reported 9/23/2026

Editing a hazard's details.



Delete "Unguarded chain drive on conveyor"?

Use this for hazards reported by mistake or twice. It disappears from lists and reports; its details, controls, photos and history are kept for the record. To finish a real hazard, close it instead.

Reason

Duplicate of the chain-guard report from station 4

Delete hazard Cancel

Deleting needs a reason.

ON MOBILE

1. Open the hazard and tap **Edit details** under the description. Change the title, description or cause, then tap **Save details**.
2. To delete, tap **Delete hazard...**, enter the reason, and tap **Delete hazard**.

Both need a connection. Editing the impact is on the web only.

If someone changed the hazard after you opened it, saving or deleting is refused. Reload, check the changes, and try again.

Reviewing places added from the field

[Safety admin](#)[Org admin](#)

Places added while reporting (see When the place isn't listed) wait for review. The number waiting appears next to **Sites & locations** in the top bar, and each site with some shows *N new from the field*. For each one, do one of the following:

- **Approve** it if it's a real, new place. Fix the name, replace the temporary **NEW-...** code with your site's own numbering, and correct the type or parent first if needed.
- **Merge** it if it duplicates an existing entry, such as "Mezz stairs" when "Mezzanine stairs" already exists. Its hazards move to the existing entry and the duplicate is removed.

ON THE WEB

1. Choose **Sites & locations** and pick the site. **New from the field** lists each place, where it was added, who added it and when, and how many hazards use it. Select the hazard count to see them.
2. To approve, choose **Approve...**, correct the **Name**, **Code**, **Type** or **Inside**, then choose **Approve**.
3. To merge, choose **Merge into existing...**, pick the entry it's the same as, and choose **Merge**. You're asked to confirm.

A hazard page with a new place also links to **Review new places**.

New from the field (1)

Added by field staff while reporting a hazard. Approve each one, correcting it if needed, or merge it into the item it duplicates.

Location **Paint mixing room** in Building A
Added by Theo Brandt on 9/26/2026 · temporary code NEW-7QK2M

[1 hazard](#)

Name	Code
Paint mixing room	A-MIX
Type	Inside
Location	Building A
Approve Cancel	

Approving a place a field worker added, with a proper code.

ON MOBILE

1. Open the **Admin** tab.
New places from the field shows how many are waiting; tap it.
2. Tap **Review...** on a place.
Choose **Approve**, correct the name, code or type, and tap **Approve**.
3. Or choose **Merge into existing**, search for the place it duplicates, and tap **Merge**.

Sites & locations

New from the field (1)

Building A > Paint mixing room

Location - added by Theo Brandt - 1 hazard

Approve

Merge into existing

Name

Paint mixing room

Code

NEW-7QK2M

Type

Location

System

Process

Task

Equipment

APPROVE

CANCEL

Locations & items

+ Add

Building A

Location - BLDG-A

Building A > Assembly Line 2

Location - A-ASM2

Building A > Paint mixing room **AWAITING REVIEW**

Location - NEW-7QK2M

Building A > Paint Shop

Location - A-PAINT

Reviewing a new place on a
phone.

Managing locations and items

Safety admin

Org admin

Hazards are recorded against **items**: locations (areas, buildings, rooms), systems, processes, tasks and equipment. Nest items to build a hierarchy, such as Area → Building → Room.

Hazards on a parent apply to everything inside it, and filters and reports use this structure.

ON THE WEB

1. Choose **Sites & locations** and pick a site on the left.
 2. Under **Add a location or item**, choose the **Type**, where it sits (**Inside**, or top level), a **Name** and a short **Code** (letters, numbers, dots, dashes; no spaces).
 3. Add **Latitude** and **Longitude**, or **Use my location**, so the mobile app can suggest it to people nearby.
 4. Use **Edit** to rename an item, change its code, or move it by changing what it's **Inside**. Everything inside it moves too, and hazard paths update. An item can't be moved inside itself or one of its own sub-items.
- Delete** works only when nothing is inside it and no hazards are recorded against it.

Sites

North Warehouse
NWH - 2 item(s) - America/Chicago

Riverside Plant
RIV - 9 item(s) - America/Chicago
1 new from the field

Add a site

Name

e.g. North Campus

Code

e.g. NORTH

Time zone (optional)

e.g. America/Denver

Add site

Item types

The kinds of thing your organization records hazards against.

Location LOC
9 item(s) - contains items
Edit Remove

System SYS
0 item(s) - contains items
Edit Remove

Process PROC
0 item(s) - contains items
Edit Remove

Task TASK
1 item(s) - job task
Edit Remove

Equipment EQUIP
1 item(s) - contains items
Edit Remove

Add an item type

Name

e.g. Vehicle, Laboratory, Pipelir

Code

e.g. VEHICLE

Locations & items: Riverside Plant

Locations, systems, processes, tasks and equipment that hazards can be recorded against. Nest items to build a hierarchy (e.g. Area → Building → Room); hazards on a parent also apply to everything inside it.

New from the field (1)

Added by field staff while reporting a hazard. Approve each one, correcting it if needed, or merge it into the item it duplicates.

Location

Paint mixing room in Building A

Added by Theo Brandt on 9/26/2029 - temporary code NEW-7QK2M

1 hazard

Approve... Merge into existing...

Location	Building A (BLDG-A)	Edit Delete
Location	Assembly Line 2 (A-ASM2)	Edit Delete
Location	Paint mixing room (NEW-7QK2M)	Edit Delete awaiting review
Location	Paint Shop (A-PAINT)	Edit Delete
Location	Building B (BLDG-B)	Edit Delete
Location	Boiler Room (B-BOILER)	Edit Delete
Location	Loading Dock 3 (DOCK-3)	Edit Delete
Equipment	Forklift 4 (FL-04)	Edit Delete
Task	Solvent drum transfer (T-SOLV)	Edit Delete

Add a location or item

Type

Location

Inside (optional)

Top level of this site

Name

e.g. Building 200

Code

e.g. B200

Latitude (optional, for GPS suggestions on mobile)

Longitude (optional)

Add item Use my location

Sites & locations: sites and item types on the left, the location tree and the add form on the right.

ON MOBILE

1. Open the **Admin** tab (safety admins and org admins) and tap **Sites & locations**. Pick the site at the top.
2. **+ Add**: enter a name and code, tap the type, and optionally search for what it's inside.
- Use my location** saves where you're standing, so the app can suggest it to people nearby.
3. Tap an item to rename it, change its code, move it (**Inside**) or **Delete...** it.

User guide Admin Sign out

Riverside Manufacturing

New places from the field

Approve or merge places added while reporting

1 >

Sites & locations

Add, rename, move or delete locations and items >

Sites

Add a site or rename one >

Users

Add people, change roles, disable, reset passwords >

Item types and single sign-on are set up on the web.

Report hazard...

Hazards

Inspections

Reports

Admin

The Admin tab.

Field staff can add a missing place from the Report hazard screen; you then approve or merge it on the web (see Reviewing places added from the field). Changes reach the app automatically: new locations appear in the Report hazard list the next time the app loads with a connection. Locations with coordinates are listed nearest-first when someone taps

Use my location .

Managing item types

Safety admin

Org admin

HMS starts with Location, System, Process, Task and Equipment. Add your own, such as Vehicle, Laboratory or Loading dock.

ON THE WEB

1. On **Sites & locations**, scroll to **Item types**.
2. Enter a **Name**. A code is suggested; change it if you like. It can't be changed later.
3. Tick **Can contain other items** (a building contains rooms; a vehicle usually doesn't) and **Usable as a job task** if it describes an activity.
4. Choose **Add type**. Use **Edit** to rename or change the options, and **Remove** to retire a type no item uses.

ON MOBILE

Managing item types is on the web only.

The mobile app shows each item's type and code under its name in the location list, for example *Equipment · FL-04*. Types marked as a task appear as *Task: ...* under a hazard's location.

Item types

The kinds of thing your organization records hazards against.

Location LOC [Edit](#) [Remove](#)
9 item(s) · contains items

System SYS [Edit](#) [Remove](#)
0 item(s) · contains items

Process PROC [Edit](#) [Remove](#)
0 item(s) · contains items

Task TASK [Edit](#) [Remove](#)
1 item(s) · job task

Equipment EQUIP [Edit](#) [Remove](#)
1 item(s) · contains items

Add an item type

Name

e.g. Vehicle, Laboratory, Pipelir

Code

e.g. VEHICLE

☒ Can contain other items

☐ Usable as a job task (JHA)

Add type

Item types, with the form to add your own.

For administrators

Org admins: sites, user accounts and access. Everything in Parts 2–4 applies to you too.

Adding sites

Org admin

A site is a facility or campus. Each has its own locations, and reports are produced per site.

ON THE WEB

1. Choose **Sites & locations**.
2. Under **Add a site**, enter the **Name**, a short **Code** and, optionally, the **Time zone** (start typing to pick from the list, for example **America/Denver**). Report dates use this time zone.
3. Choose **Add site**, then add its locations.

ON MOBILE

On the **Admin** tab, tap **Sites**:

+ Add a site (name and code; the time zone is your phone's), or tap a site to rename it. Change a time zone on the web.

New sites appear in the app's Reports tab and in reporting once the app next loads with a connection.

Adding users

Org admin

ON THE WEB

1. Choose **Users**.
2. Under **Add a user**, enter the **Full name** and **Email**, and choose a **Role** (see Roles).
3. Leave **Email them an invitation** ticked and choose **Add and send invitation**. They get an email with a link to choose their own password (valid 7 days) and your organization code (see Accepting an invitation).
4. **Or, without email:** untick **Email them an invitation** and choose **Add user**. HMS shows a **temporary password once**. Use **Copy** and give it to the person through a trusted channel, then choose **Done**. They sign in with it and must choose their own password first.

Add a user

They get an email with a link to choose their own password (valid 7 days).

Full name	Email
Sam Rivera	sam.rivera@riverside.test
Role	
Field worker	
☒ Email them an invitation (recommended)	
Add and send invitation	

Adding a user with an email invitation.

Temporary password for Jamie Cole

Give this to jamie.cole@riverside.test through a trusted channel. It works once: they must choose their own password when they sign in. It will not be shown again.

•••••-•••••-•••••-•••••	Copy
Done	

The one-time temporary password (masked in this manual).

ON MOBILE

On the **Admin** tab, tap **Users**, then **+ Add a user**: email, name and role. Leave **Email them an invitation** on to send the invitation, or turn it off to get a temporary password, shown once with **Copy**.

Either way, new users can start on mobile straight away with the password they set.

Someone who already has an HMS account (for example with another organization) is added straight away and keeps their existing password: no invitation or temporary password is needed.

Changing roles, disabling and resetting passwords

Org admin

The **Users** list shows each person's role, status (*Active*, *Must set password*, *Locked* or *Disabled*) and last sign-in. Changes take effect on the person's **very next action**, on the web and on mobile. They don't have to sign out first.

ON THE WEB

- **Change role:** pick the new role in their **Role** dropdown. It saves immediately.
- **Disable:** choose **Disable** and confirm. They are signed out everywhere and can't sign in. **Enable** restores access; they sign in again.
- **Resend invitation:** for someone who hasn't set a password yet (*Must set password*), choose **Resend invitation**. Any earlier link stops working.
- **Reset password:** choose **Reset password** and confirm. Their old password and open sessions stop working, a locked account is unlocked, and a new temporary password is shown once.

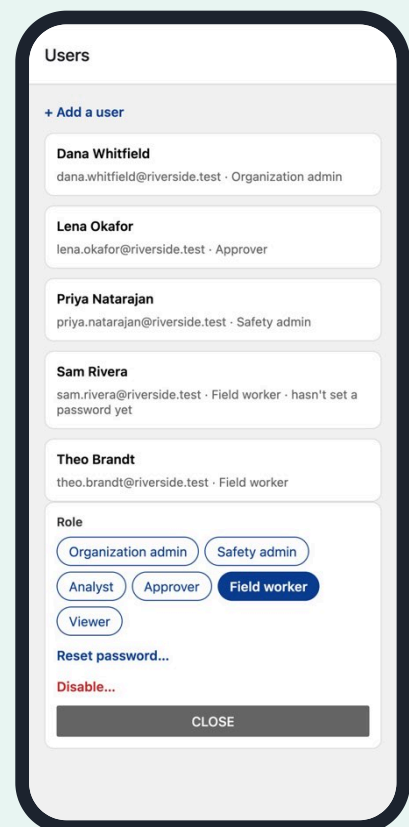
Users					Single sign-on settings
Invitation emailed to sam.rivera@riverside.test. The link works for 7 days.					
Name	Role	Status	Last sign-in		
Dana Whitfield dana.whitfield@riverside.test	Organization admin	Active	10/2/2026, 7:50:01 PM	Reset password	
Lena Okafor lena.okafor@riverside.test	Approver	Active	9/26/2026, 8:15:05 PM	Reset password	Disable
Priya Natarajan priya.natarajan@riverside.test	Safety admin	Active	10/2/2026, 7:49:19 PM	Reset password	Disable
Sam Rivera sam.rivera@riverside.test	Field worker	Must set password	Never	Resend invitation	Reset password Disable
Theo Brandt theo.brandt@riverside.test	Field worker	Active	10/2/2026, 7:49:56 PM	Reset password	Disable

The Users list: change a role in place, resend an invitation, reset a password, or disable an account.

ON MOBILE

On the **Admin** tab, tap **Users** and then a person. Tap a role to change it. **Resend invitation** appears for people who haven't set a password yet.

Reset password... shows a new temporary password once; **Disable...** / **Enable...** asks you to confirm.



Managing a user on a phone.

What the person sees on their phone: after a disable or reset, their next action shows *Your session has ended* and returns them to sign-in. After a role

change, the app shows or hides actions the next time a screen loads.

Safeguards: you can't disable your own account, and HMS won't let the organization end up without anyone who can manage users. You can't reset the password of someone who also belongs to another organization; they must change it themselves. Every change is recorded with your name.

Setting up single sign-on

Org admin

Let people sign in with their work account instead of an HMS password. HMS uses **OpenID Connect**, which Microsoft Entra ID (Microsoft 365), Google Workspace, Okta and most other identity providers support.

ON THE WEB

1. Choose **Users**, then **Single sign-on settings**.
2. **Register HMS with your provider:** create a web application (an "app registration" in Entra, an "OAuth client" in Google, an "OIDC web app" in Okta). Use the **redirect URI** shown on the page; **Copy** copies it.
3. **Connection:** enter the provider's **Issuer URL**, **Client ID** and **Client secret**, and choose **Test connection**. The secret is stored encrypted and never shown again.
4. **Who can sign in:** list your **Allowed email domains**. Optionally, tick **Create an HMS account the first time...** and choose the role new accounts get. Without that option, only people already added under Users can sign in.
5. **Turn it on:** set the button text, tick **Offer single sign-on** and choose **Save**. Untick **Also allow HMS passwords** to make it SSO only.

ON MOBILE

Setting up single sign-on is on the web only.

Once it's on, the app shows **Sign in with ...** on its sign-in screen. Nothing needs installing on phones.

[← Users](#)

Single sign-on

Let people sign in with their work account (Microsoft Entra ID, Google Workspace, Okta or another OpenID Connect provider).

1. Register HMS with your provider

Create a web application ("app registration" in Entra, "OAuth client" in Google, "OIDC web app" in Okta) and use this redirect URI:

`http://localhost:4000/v1/auth/sso/callback`

Copy

Scopes: openid, email, profile. The provider gives you an issuer URL, a client ID and a client secret.

2. Connection

Issuer URL

`http://localhost:4400`

Entra: `https://login.microsoftonline.com/<tenant-id>/v2.0` · Google: `https://accounts.google.com` · Okta: `https://<your-org>.okta.com`

Client ID

`hms-local`

Client secret

Saved (encrypted). Type to replace

The secret is stored encrypted and never shown again. Or enter `env:NAME` to read it from a server environment variable.

Test connection

3. Who can sign in

Allowed email domains

`riverside.test`

☐ Create an HMS account the first time someone from these domains signs in

Without this, only people already added under Users can sign in. Existing users are matched by email.

4. Turn it on

Button text

`Riverside Microsoft 365`

Shown as "Sign in with Riverside Microsoft 365".

☒ Offer single sign-on

☒ Also allow HMS passwords

Save

Single sign-on settings.

Good to know. People are matched to HMS accounts by email, and only emails in your allowed domains get in. An invited user becomes active the first time they sign in with SSO; disabled users stay disabled. When an organization is SSO only, "forgot password" emails are turned off, and org admins keep their password for emergencies. Issuer URLs by provider: Entra `https://login.microsoftonline.com/<tenant-id>/v2.0`, Google `https://accounts.google.com`, Okta `https://<your-org>.okta.com`.

Getting this guide

Everyone

Download the latest PDF of this guide at any time:

- **Web:** [User guide](#) in the menu bar, or [Read the user guide \(PDF\)](#) on the sign-in and sign-up pages.
- **Mobile:** [User guide](#) at the top left of every tab, or on the sign-in screen.

What works offline on mobile

Everyone

Function	Without a connection
Report a hazard	Works. Saved on the phone and sent when back online.
Photos taken with a report	Works. Kept on the phone and uploaded after the report.
Do an inspection (with photos)	Works. Saved on the phone and sent when back online.
See my inspections due	Shows the last list loaded
Add a place that isn't listed	Works. Created with the report when it syncs.
See your hazards list	Shows the last list loaded, marked as offline
Open a hazard, update controls, add or remove photos, edit or delete it, close or reopen	Needs a connection
Share or email a report	Needs a connection
Sign in (password or single sign-on)	Needs a connection (you stay signed in afterwards)

Troubleshooting

Everyone

You see	What to do
"Incorrect organization, email or password"	Check the organization's short name and your email. Five wrong attempts lock the account for 15 minutes. Forgotten it? Use Forgot your password?
"This link doesn't work any more"	Reset links work once, for 30 minutes, and only the newest one works. Ask for a new link.
"Your session has ended"	Sign in again. If you can't, your account may be disabled: contact your administrator.
"This hazard cannot be closed yet"	Follow the listed items: mark controls done, add the right control, or rate the risk after controls.
"Severity can only be reduced by an elimination or substitution control"	Keep the severity the same and lower only the probability, or add the control that removed or replaced the hazard.
A report stays "Waiting to sync" on mobile	Connect to Wi-Fi or mobile data and pull down on the Hazards tab. If it says "Rejected", read the reason, then discard it and report again.
"Offline and nothing cached yet" on mobile	Open the app once with a connection to download your sites and locations.
A location you need isn't listed	Add it as part of your report with <i>Not listed? Add it</i> (see When the place isn't listed). A safety admin reviews it.
"An item cannot be moved inside itself or one of its own sub-items"	Choose a parent outside the item you're moving, or move its sub-items first.
"This hazard already has 3 ... photos"	Each group holds 3. Remove one you added (or ask safety personnel) to make room.
"This file isn't a photo HMS can read"	Use a JPEG, PNG or WebP picture. On an iPhone, pick it from the Photos app through HMS rather than as a file, so it's converted automatically.
A report on mobile says "photo(s) waiting to upload"	The hazard is saved; its photos upload when you have signal. Pull down on the Hazards tab to retry.
"... isn't allowed to sign in to ..." (single sign-on)	Use your work account in your organization's email domain. If the domain is right, ask your administrator to add it under Single sign-on settings.
"There's no HMS account for ..." (single sign-on)	Your administrator needs to add you under Users, or let accounts be created automatically.
"Your organization signs in with single sign-on"	Use the Sign in with ... button instead of a password.

You see	What to do
"Your password is incorrect" when approving	Approving asks for your HMS password again. If you sign in with single sign-on, choose "I sign in with single sign-on" and type your full name instead.
"Send for approval" is greyed out	The message beside it says what's missing: at least one approver and at least one hazard on the worksheet.
"Answer every question"	Every checklist question needs Pass, Fail or N/A. Use N/A where it doesn't apply.
"This scheduled inspection has already been completed"	Someone else completed it first. Refresh the list; the next one is already booked.
"No one is responsible for this inspection"	Reminders need a responsible person: set one on the schedule.
"You can email up to 10 reports per hour"	Wait, or download the PDF and share it yourself.

Not available yet

Everyone

These are planned but not in this version:

- Updating or closing hazards while offline
- Hazard analyses on mobile (read, review, approve)