Safety Meetings

VelocityEHS®

586 Argus Road
Suite 300
Oakville, On

Main: 1.888.362.2007
Fax: 1.312.881.2001
Web: www.EHS.com

Contents

Meeting Workflow 2

Safety Meeting—Creating and Scheduling a New Meeting 2

Safety Meeting—In Progress 3

Safety Meeting—Schedule Next 3

Try this: 4

Knowledge Check: 4

Tips and Tricks 4

Meeting Workflow

Draft → Scheduled → Closed

Created by

Attendees

Safety Meeting—Creating and Scheduling a New Meeting

- Create a new safety meeting by clicking on the 'Add New' tab from the navigation bar, click 'Safety Meeting' and fill out the form using an example you create. Here are some pointers for you to consider:
  - Enter as much information and detail as possible into the meeting form.
  - Select the location of the meeting. In the location information text box, be specific with the details of where the meeting will be taking place.
  - Enter all the names of the attendees who will be invited to the meeting. Use the rder to add additional people.
  - The people who are listed as attendees for the meeting will receive a notification advising them of the meeting that they have been invited to.
  - From the index on the left-hand side of the screen, select 'Topics and Actions.' Begin adding your topics for the meeting.
  - Add any attachments that you may want to include for your meeting.

- Ensure that you always save along the way. The 'Save' option can be found in the hamburger menu ☰ at the top right of your screen.
- Once all the topics have been added and the attendees have been included, schedule the meeting using the 'Schedule Meeting' button at the top right of your screen.
- 'Topics and Actions' can be added to the meeting, before or during the meeting, as necessary.

Safety Meeting—In Progress

- Access the meeting from your dashboard in the "My to Do's" webpart, the monitor menu, or from the notification email link.
- Consider these points when the meeting is in progress:
  - Check the box beside the individuals who attended the meeting.
  - Enter all of your topic notes in the 'topic and actions' tab.
  - Assign any necessary corrective actions to the topics. Additional corrective actions can be added by using the 'add another' button.
  - Ensure that all the information is correct.
  - Verify the corrective action(s) are appropriate.
  - Once all the notes have been taken and the meeting is complete, close the meeting by clicking 'Close Meeting' at the top right of your screen.

Safety Meeting—Schedule Next

- Access the closed meeting from the monitor menu.
  - Once the meeting has been closed, you can schedule the next meeting by clicking the 'Schedule Next' action button.
  - Enter the date and time of the new meeting and select 'Schedule' from the top right of your screen. At this point, the workflow will begin again.
  - If scheduled again, the attendees and topics carry forward.

- The notes from the previous meeting will move forward and be added as historical notes within each topic.

Try this:

- ☐ Add attendees to your meeting.
- ☐ Create 3 topics and add them to the meeting.
- ☐ Add topic notes to each of the topics.
- ☐ Include an attachment with your meeting.
- ☐ Close the meeting and schedule the next one.

Knowledge Check:

1. True or False: I can add notes to a meeting that I am a participant of.
2. True or False: I can close a meeting that I am a participant of.
3. True or False: When a new meeting is scheduled, I can adjust the attendee list.
4. True or False: I can reopen a closed meeting to add additional items or an attachment.
5. Describe how you can add, remove, and reorder topic items. ____________________

   ____

Tips and Tricks

- ✔ Anyone can create a meeting; meetings can be viewed – but not edited-by anyone
- ✔ Report who attended and did not attend.
- ✔ When a meeting is closed, use the "Schedule Another" action to clone the meeting and the agenda topics and track history from the previous meeting.
- ✔ Actions do not persevere; they are tracked separately.
- ✔ Use the 'Print' action to print the meeting minutes (Topics, Notes and History). Minutes are also included in the email.
- ✔ Reporting is based on what happened at the location; people can show up in multiple locations.