SAFETY NEST

SAFETYNEST ADMIN SETUP MANUAL

PART ONE

This guide will walk you through setting up your new SafetyNest site so that you can integrate your new system as soon as possible.

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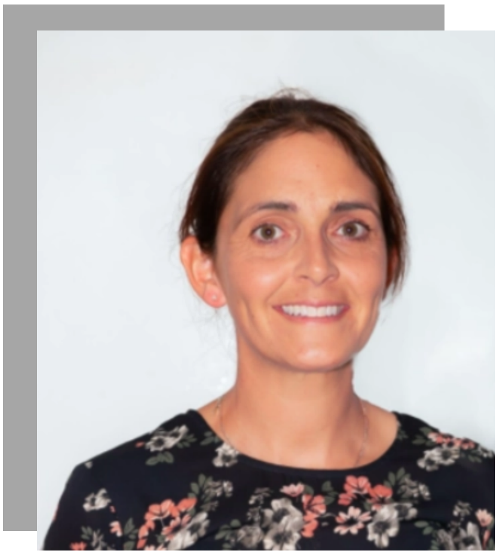
WELCOME

TO YOUR NEW SAFETYNEST HEALTH AND SAFETY TOOL!



We're thrilled to have you on board as you embark on a journey to transform the way you manage health and safety in your childcare centre(s).

It's time to wave goodbye to stacks of compliance paperwork and regulatory confusion.

With our tool, you can now simplify and streamline every aspect of health and safety management. From tracking medicines to incident reporting and safety checklists, it's all at your fingertips.

But that's not all – we're here to give you back something you value most: time!

Our tool is designed to slash those hours spent wrestling with compliance paperwork, letting you focus on what truly matters – nurturing a safe and thriving environment for your tamariki and staff.

Say hello to a centralised hub where all your compliance documents find a cozy home. No more frantic searches or scattered files – it's all neatly organised, just a click away.

Reporting? Consider it done. Our tool is your reporting superhero, effortlessly generating insights from your health and safety systems, making those regular reports a breeze.

And let's talk about staff – the heartbeat of your centre. Our tool takes the hassle out of induction and training, helping you maintain uniform training standards and stay up-to-date with qualifications like a pro.

So, get ready to embrace a new era of simplicity, efficiency, and excellence in ECE health and safety. We're here to empower you, so you can focus on what you do best – shaping bright futures and creating wonderful memories.

Congratulations again on your new investment!

We look forward to helping you streamline your Health & Safety processes so that you can focus on the parts you enjoy more.

LET'S GET STARTED

ADMIN SETUP CHECKLIST

This list will help you setup your SafetyNest tool with your desired admin settings, so that your team can get underway as soon as possible:

- Set up your site configuration settings (including classrooms/areas, system configuration)
- Create checklist templates to help you do your daily, weekly and monthly compliance and any other checks
- Create your Daily Charts for the Sleep and Toileting Registers
- Set your SafetyNest site up across your devices to give you access at your fingertips
- Provide access to your teachers
- Set up email workflows and reminders, enabling notifications to go to the correct people
- Work through the Health & Safety basics so that you know what your tasks are, and to decide which tasks can be outsourced to your team.
- Create your risk register so that it's all ready to use when you need it.
- Complete the people tools training to implement this into your HR processes.
- Set up your automated reports and reminders, so that these can automatically be generated and sent at regular intervals.
- Watch the skills and training tools videos, to use for your internal and external training

TABLE OF CONTENTS

How To: SET UP YOUR CONFIGURATION SETTINGS

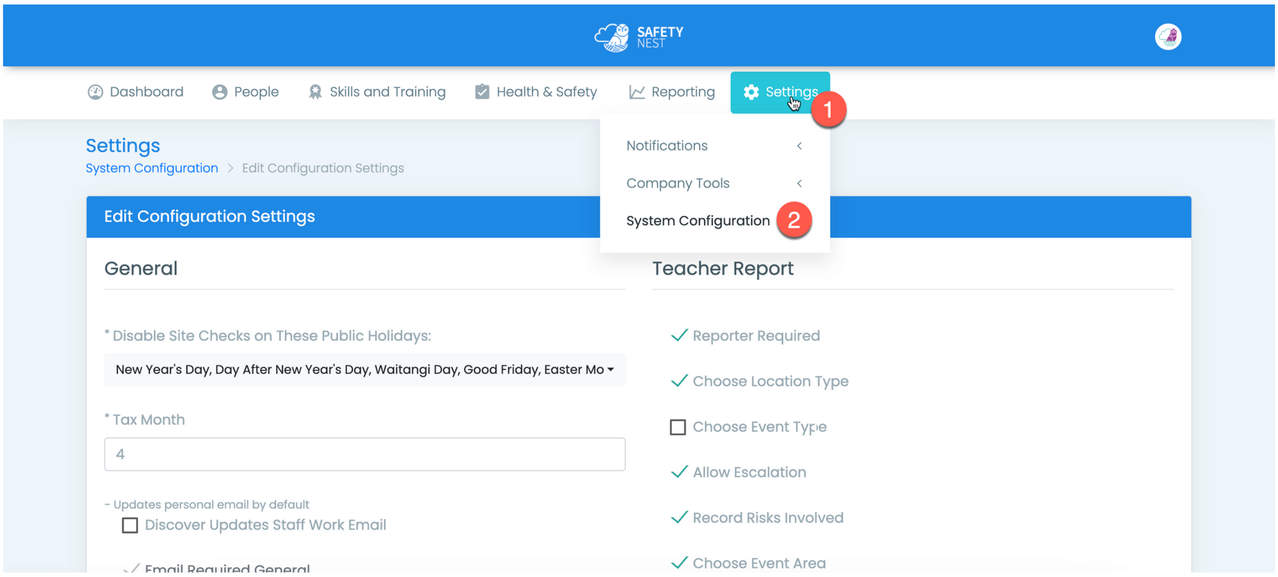
The next step is to complete your configuration settings.

This is important because it will determine the settings for your:

1. General Settings
2. Teacher Reports
3. Medicines Settings
4. Event Report
5. Teacher Login

These settings will determine how these Safety Nest features are used for your centre.

1 **To complete your configuration settings go to:**
Settings > System Configuration > Edit Configuration

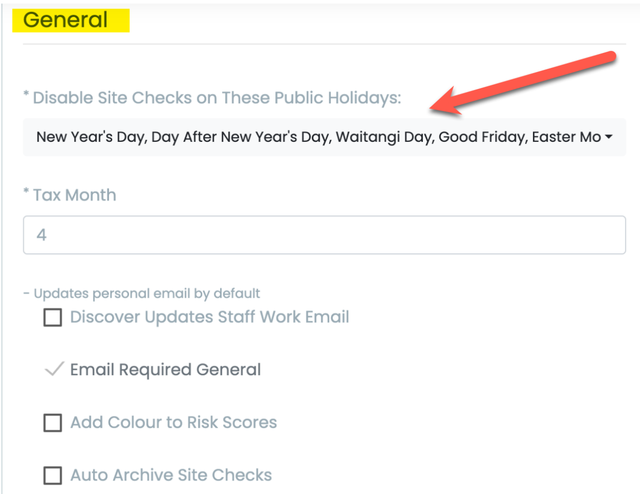


General Settings Explanation And Recommendations:

This is where we will set up all your general site wide settings.

The first setting you'll see are your general settings:

2 **Here you will simply choose any holidays that your team will not be required to complete any site checks.**



By default, all of the NZ National Holidays are selected. But, make sure that you select your regional-specific holidays or centre-specific shutdown days.

3 **Next, you will select your tax month.**

4 **Then there are three optional tick boxes:**

1. Discover Updates Staff Work Email:
If you are using Discover, and tick this box, your staff emails will automatically come across from Discover

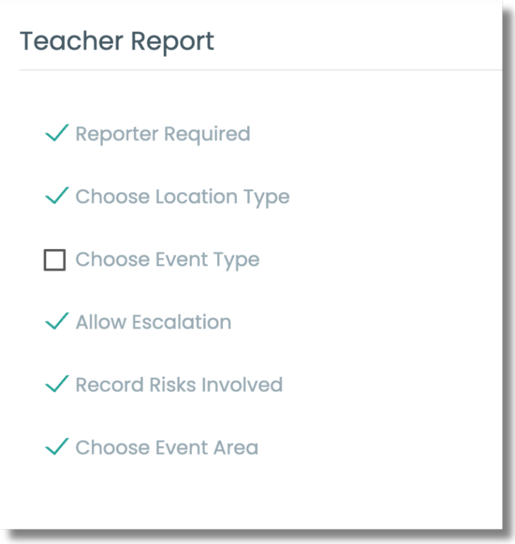
2. Add Colour to Risk Scores:
If you turn this on it will add a traffic light colour system to your Risk Register once this is set up.

3. Auto Archive Site Checks:
If selected, this will archive your Site Checks after 30 days, so that they no longer appear on your screen. They won't be deleted, they will just be hidden.

Teacher Report Explanation And Recommendations:

5 **Next you need to set up your Teacher report settings:**

This is the access that your Teacher's have under their shared login.



We recommend that you keep "Choose Event Type" unselected for the first month of so of using Safety Nest, or until your Teachers know the difference between an observation, a near miss or an injury.

1. Reporter required:
Ticking this box will mean that Teachers will have to type in their name when they are reporting any observations or incidents.

2. Choose Location Type:
This will require people to select whether incidents happened onsite or offsite. I recommend keeping this box unticked, but you can keep it ticked if you wish to.

3. Choose Event Type:
When ticked, this will require your Teacher to select whether an event was an observation, a near miss, an incident or an injury.

Here's a reminder for what each type of event means:

- **An observation** is two or more steps away from an incident or injury occurring
- **A near miss** is one step away from an incident or injury occurring
- **An incident** is where something is broken and
- **An injury** is where someone is hurt

4. Allow Escalation:
By clicking on "allow escalation" that enables your team have the ability to click on the inform management buttons, which will set off the email chains.

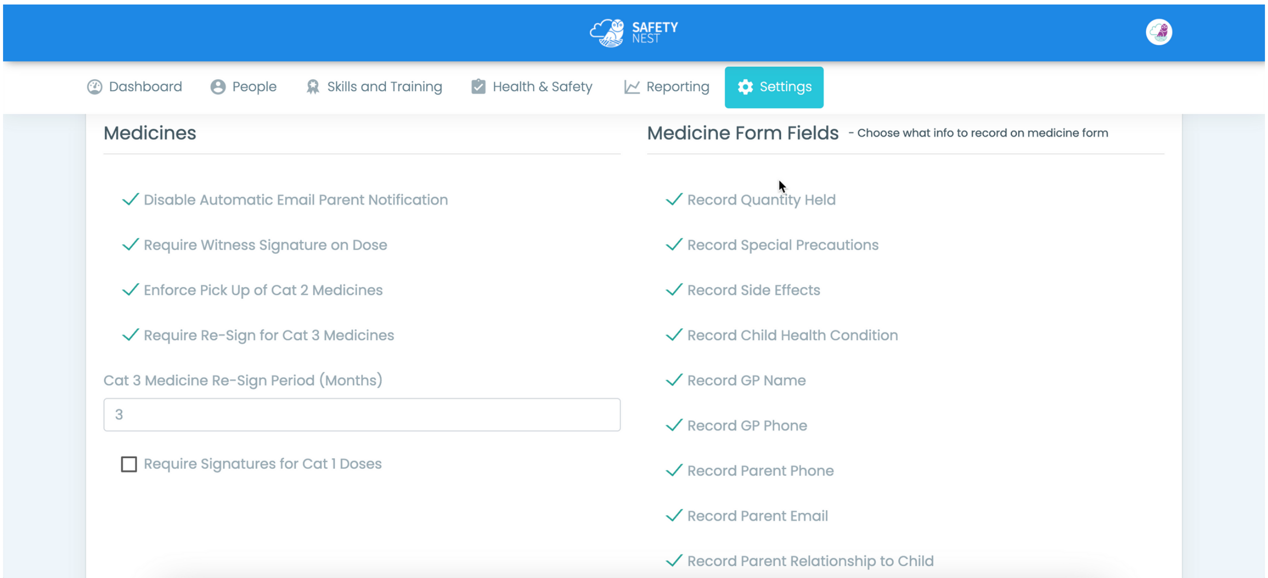
5. Record Risks Involved:
Once you have your risk register set up, clicking this option will enable your Teacher to choose which one(s) of your risks were involved in an event. For example: If you have your Swings listed in your Risk Register, clicking this box will allow the Swings to appear in a drop-down box for your Teachers to select.

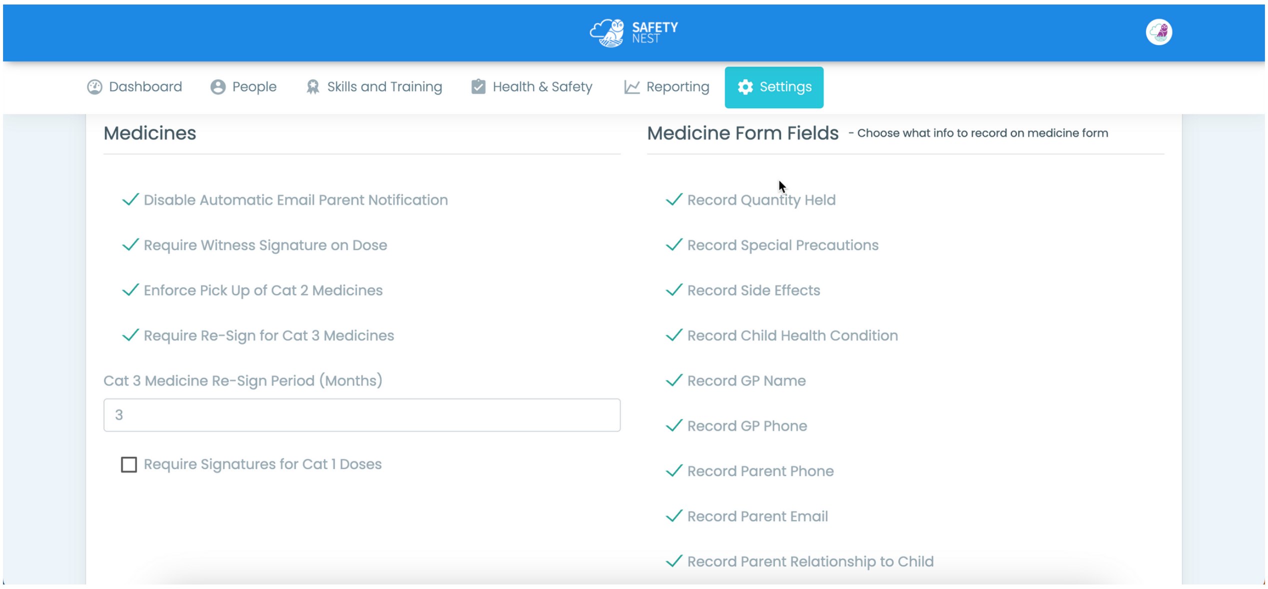
6. Choose Event Area:
When you set up your sites, we encouraged you to set up different areas of your site. For example Indoor and Outdoors, or your different classrooms. Ticking this box will allow Teachers to select from a drop-down box of where an event or incident occurred.

Medicines Settings

6 **The next group of fields control your medicine settings**

We recommend that when completing this medicine section, you check your internal medicine policy to ensure that what you'll be doing in practice complies with your policy.





1. Disable Automatic Email Parent Notification:
When clicked this will remove the automatic parent notification that will get sent every time a medicine is administered.

2. Require Witness Signature on Dose:
We recommend that you always have this clicked, to require a witness signature every time a medicine is administered.

3. Enforce Pick Up of Cat 2 Medicines:
We recommend that you tick this to always enforce pick up of any Cat 2 medicines at the end of each day

4. Require Re-Sign for Cat 3 Medicines:
We recommend that you tick this to always require Re-Sign for Category 3 Medicines. Whilst this is a free text box, 3 months seems to be in line with most of your policies.

5. Require Signatures for Cat 1 Doses:
It's not necessary to require a signature for Category 1 doses, but if it's in line with your internal medicine policy to do so, the option is there for you to tick that one on.

6. Medicine Form Fields:
Here is where you will select which form fields will appear on your medicine reports. By default they are likely all switched on. But, you may only be interested in some of them, and can therefore untick the ones you don't require to customise your medicine form.

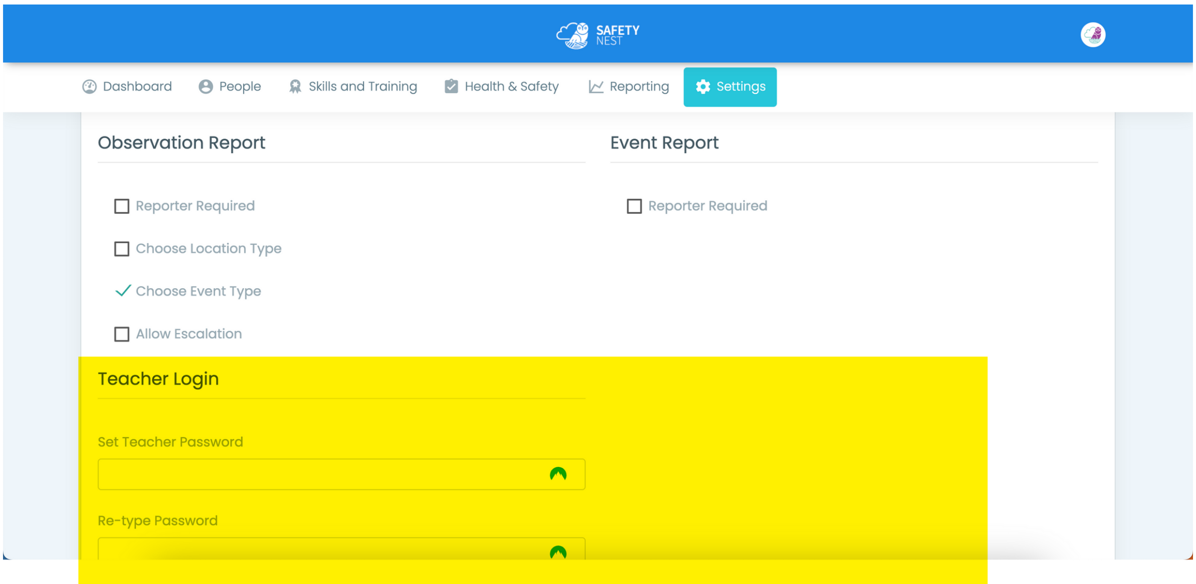
Teacher Login

8

Here is where you can setup your Teacher password for your combined Teacher login. Make sure that you choose something secure that your Teacher's will be able to remember.

Having a Passphrase is a good strategy here to keep the account secure. A passphrase is a group of words together which will be easy to remember but hard to guess.

For example: TryAgainSunshine!



How To: SET UP YOUR SITES

1 **The first step to getting started with SafetyNest is to set up all of your sites and site settings.**

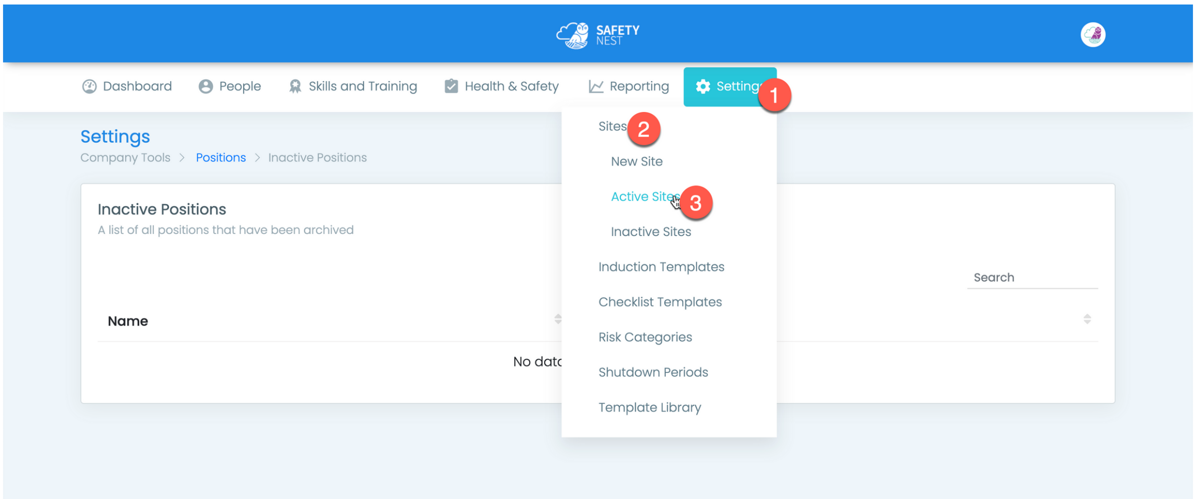
This is important because it will allow you to later attach any accidents, injuries, or incidents that happened to the actual area that they happened in.

There are two steps to setting up your sites:

1. Add each of your centre's name
2. Add the areas of your centre - for example indoor/outdoor, 0-2 room, 2+ room.

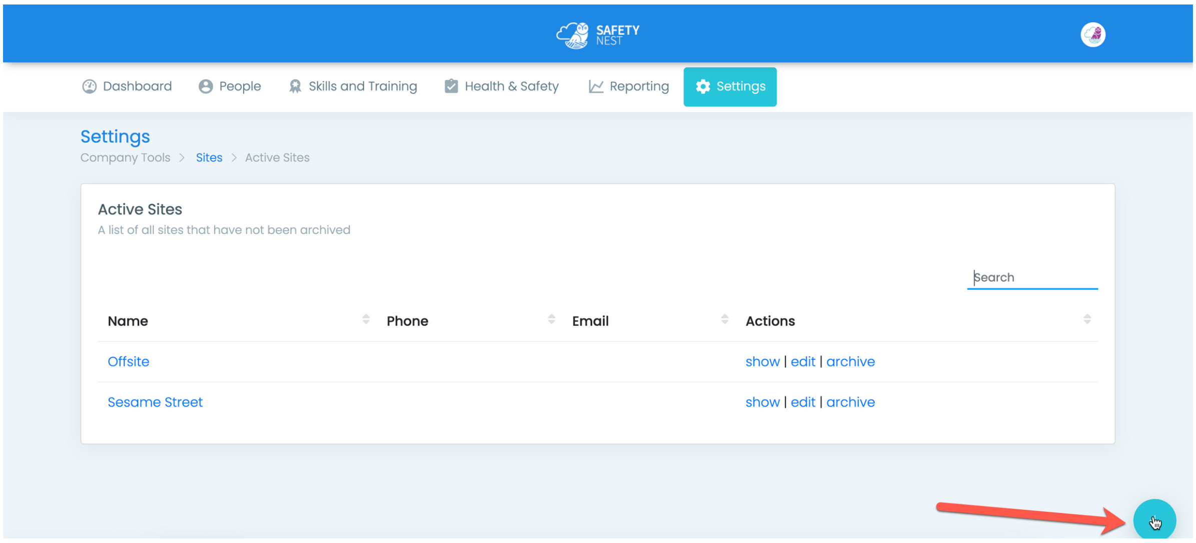
To set up your centres go to Company Tools > Sites > Active Sites

2 **The first step to getting started with SafetyNest is to set up your site and site settings.**

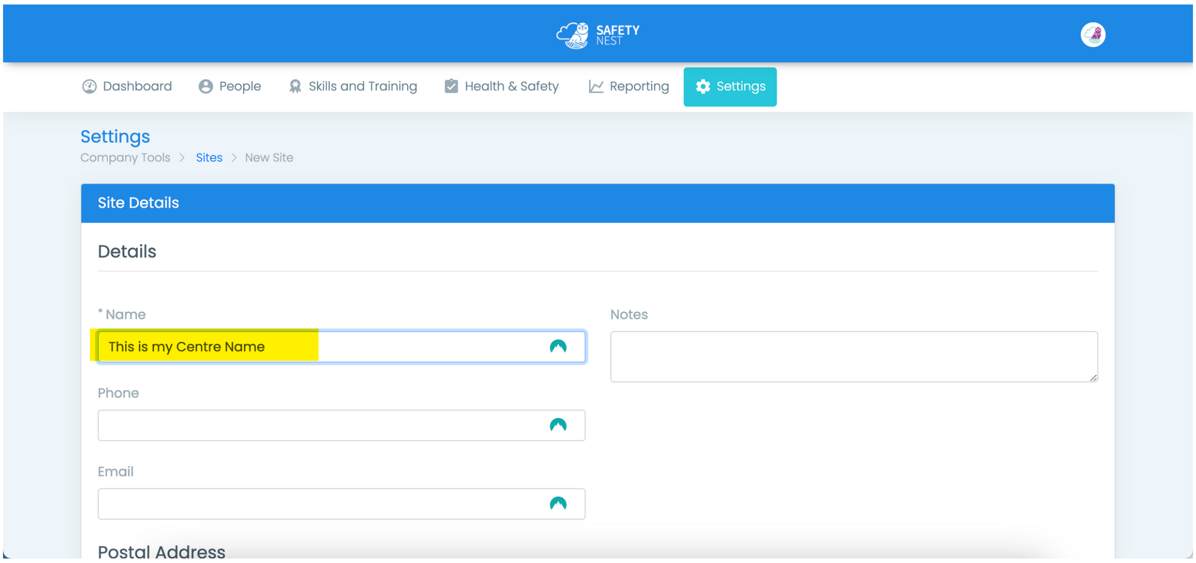


3 **Offsite is automatically there.**

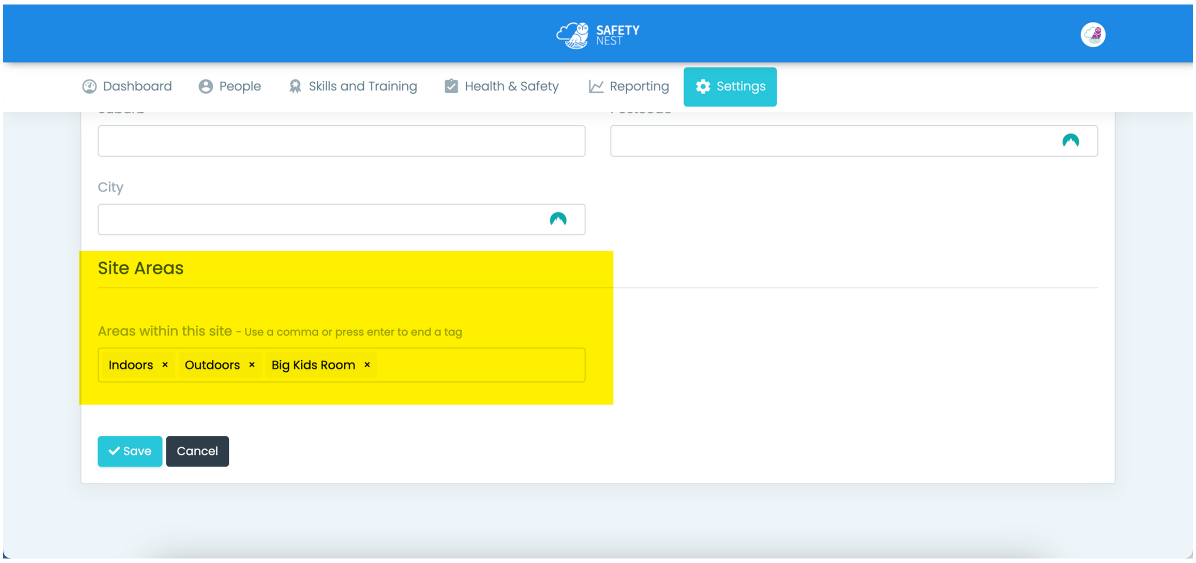
4 Click the blue + sign to add the name of your Centre



5 Add your Centre name and details:



6 **Then, add the areas of your centre (these could be room names or more specific areas of your centre e.g. grass, sandpit, kai area etc:**



7 **Click Save.**

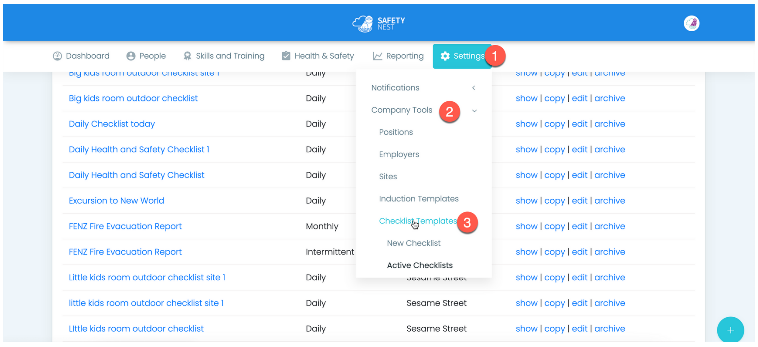
How To: SET UP YOUR CHECKLIST TEMPLATES

Now it's time to set up your checklist templates. Setting up these checklist templates will enable the teachers to start using the checklists within SafetyNest to replace any checks that you normally use a paper checklist for, whether it be your daily opening and closing checks, your monthly playground checks, your fire drills, your lockdown drills, or any other kind regular safety checks.

Before you can set up your templates, consider:

1. What checks (safety or otherwise) need to be done
2. Which areas need to be checked
3. How often each different check needs to be performed

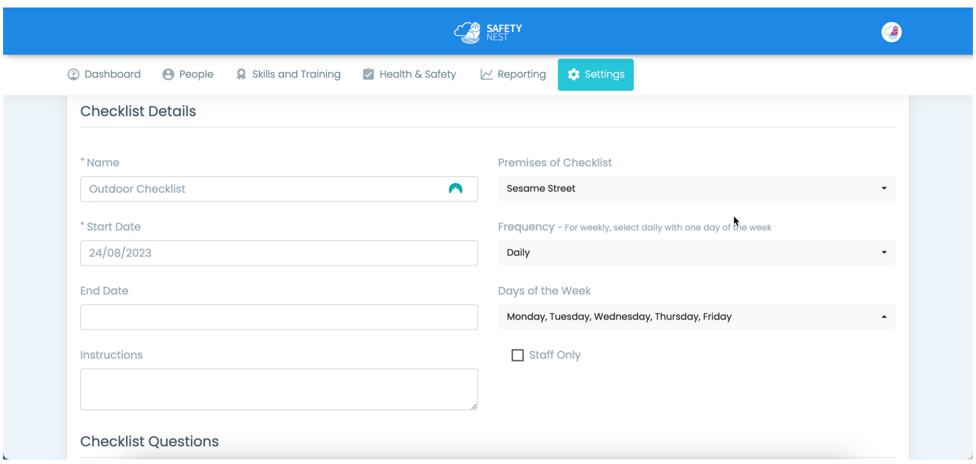
1 **You'll find your checklist templates under the Settings Menu, under Company Tools:**



We recommend that if you have any safety checks in a Word or other type of document, that you have these open in another window. Then you can quickly copy and paste your existing checklists into SafetyNest.

2 **Once there, click the blue + button to add a new checklist.**

3 **Then, complete the form to create your new checklist template:**



You will need to:

- Give your checklist a name
- Choose a start date
- Choose the site
- Give it a frequency and days of the week
- Give any specific instructions.

  For example: *"Please check each of the following areas, if there is a hazard please complete the comment box and select inform management if needed."*

- Write the checklist questions.

  For example: *"Earthquake safety: items are stored safely and furniture is attached to the walls."*

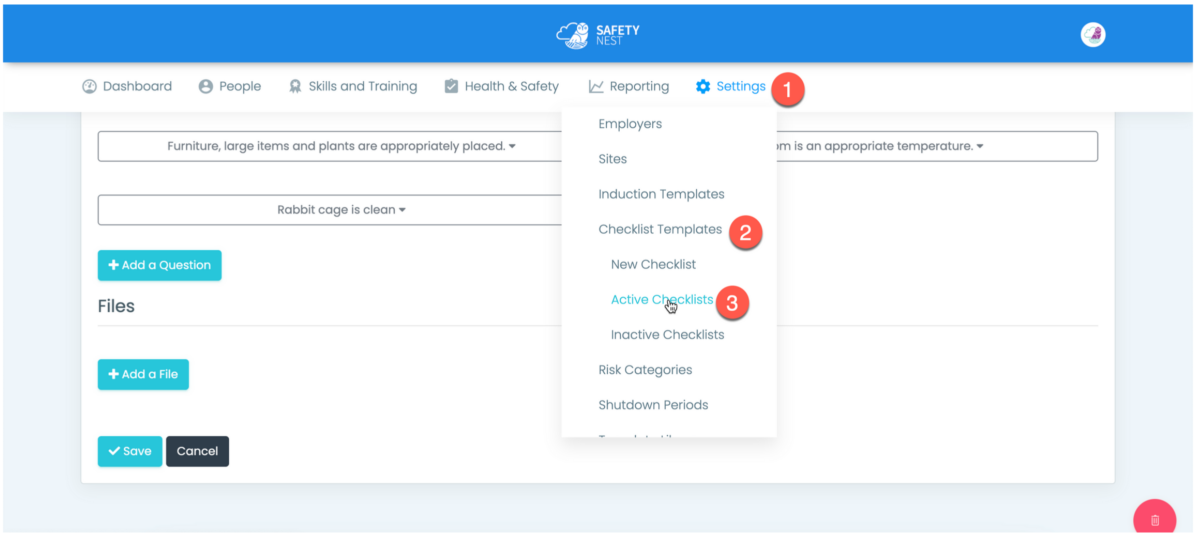
- And add any files – for example checklists to print

Once you have completed the checklist template form, press save, and repeat the process for all additional checklists that you require.

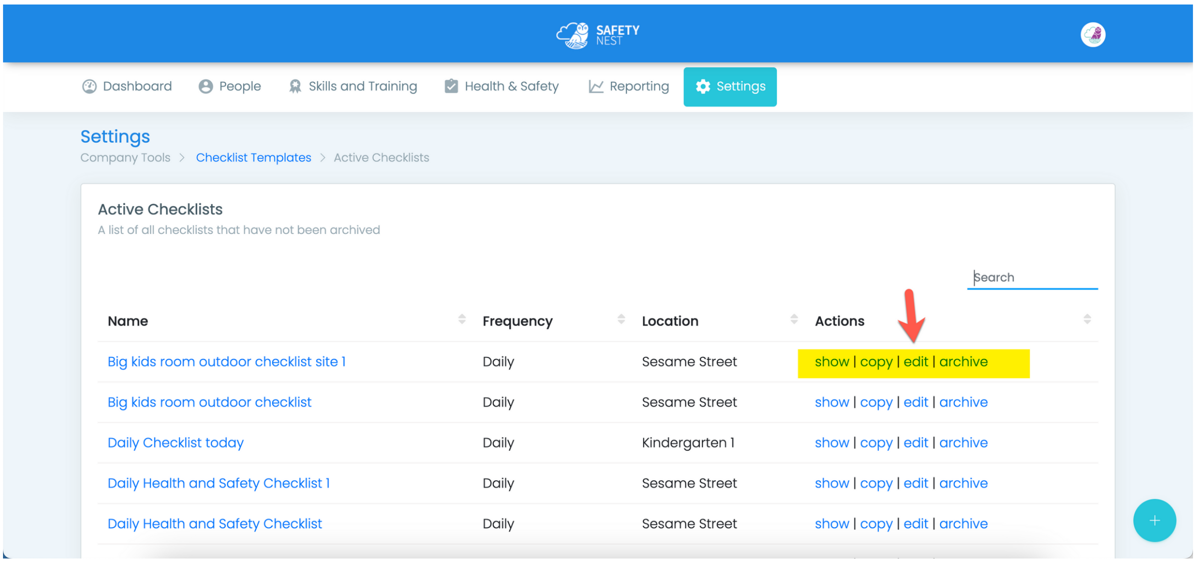
If you have any checklists that are very similar to each other, but you just need to change a few details, for example an Outdoor Checklist that is similar across areas, you can save time by choosing to "copy" a template.
Then, update the copy to reflect the changes you require.

How to edit an existing checklist templates:

1. **If you need to edit an existing checklist template, go to Settings, Company Tools, Checklist Templates:**



2. **When there, click "edit" on the checklist template you need to update.**



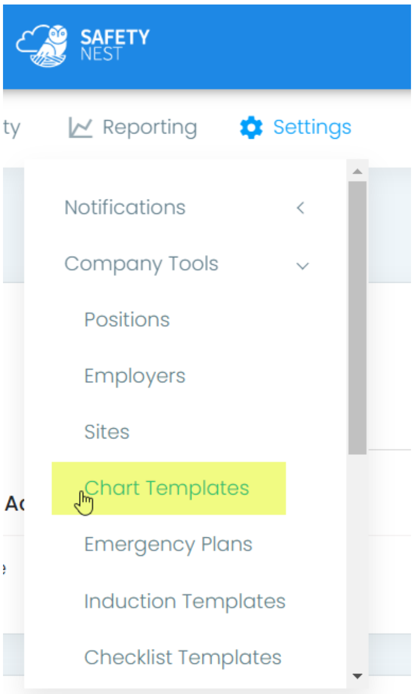
3. **Click save when you're finished.**

4. **From this same menu, you can also archive checklist templates which are no longer required.**

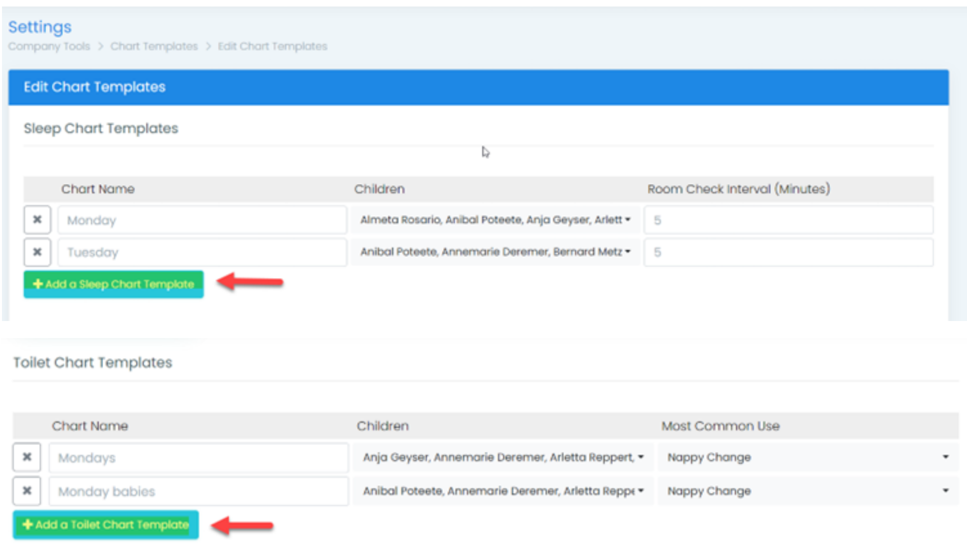
How To: SET UP YOUR DAILY CHARTS FOR SLEEP AND TOILETING

Now it's time to set up your Daily Chart templates. Setting up these chart templates will enable the teachers to start using the Sleep and Toileting Tools to replace any paper forms, whiteboards or other manual methods to ensure your records are compliant.

1 **You'll find your chart templates under the Settings menu, under Company Tools:**



2 **Once there, you can add or edit Sleep Charts or Toilet Charts by clicking the add a sleep or toilet chart template**

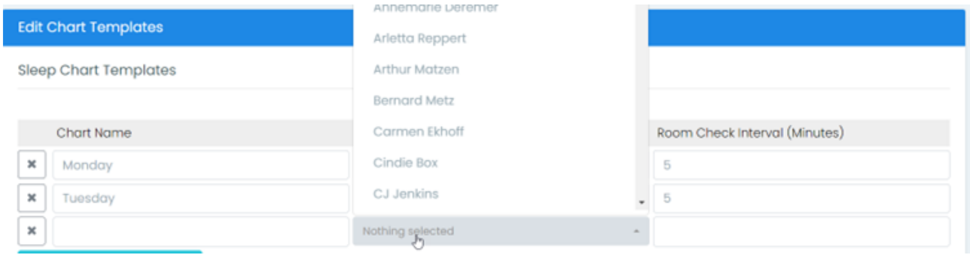


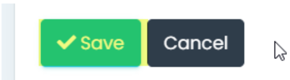
3

To set each Sleep Chart Template,

- Name the template e.g. Tuesday babies room
- Add the children for that day by selecting them from the drop down box
- Enter in the amount of minutes between each sleep room check.

Click Save at the bottom of the screen.

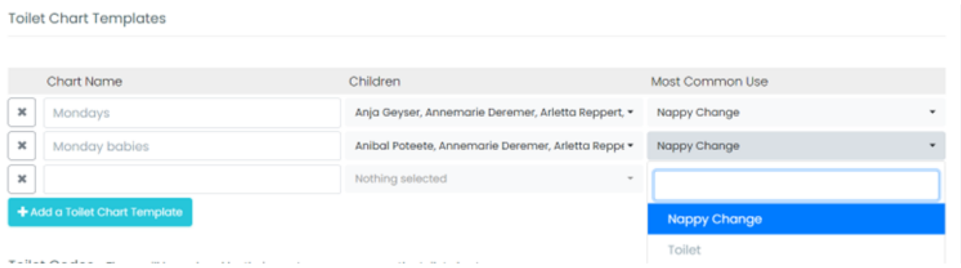




3 To set each **Toilet Chart Template**,

- Name the template e.g. Tuesday nappies, Tuesday toilets
- Add the children for that day by selecting them from the drop down box
- Select the most common use for the chart i.e. Nappy Change or Toilet

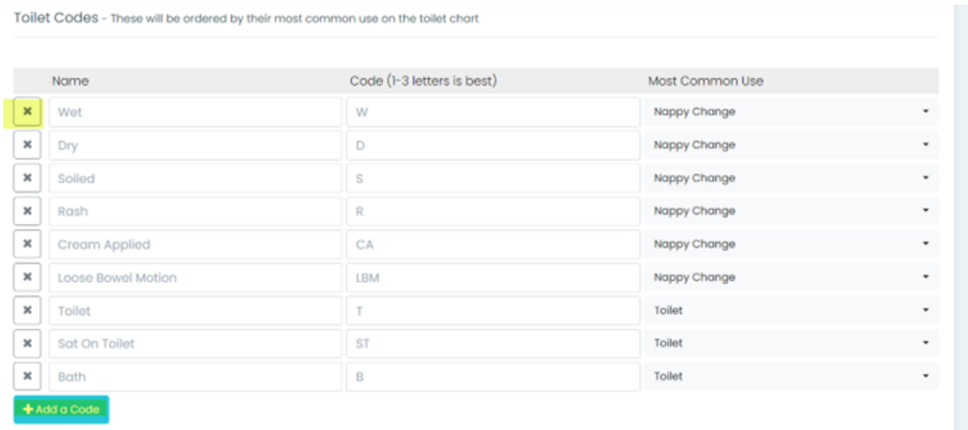
Click Save at the bottom of the screen.



4 The **Toilet Codes** are preset, but can be edited. deleted or more can be added.

- To remove a code, click on the X next to the name of the code
- To edit, type over any of the existing names/codes or common use
- To add a new code, click on Add a Code

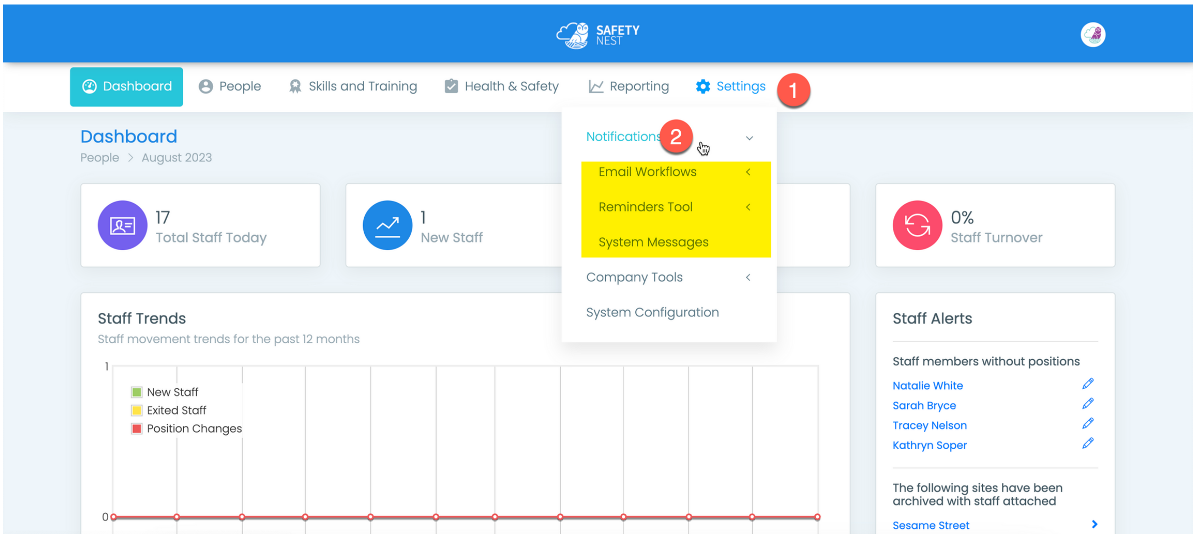
Click Save at the bottom of the screen.



How To: SET UP YOUR WORKFLOW AND REMINDER NOTIFICATIONS

Setting up your workflow and reminder settings will establish who you'd like to notify when specific things have happened, or have missed happening.

You'll find your notification settings under Settings > Notifications



How to create a new Email Workflows:

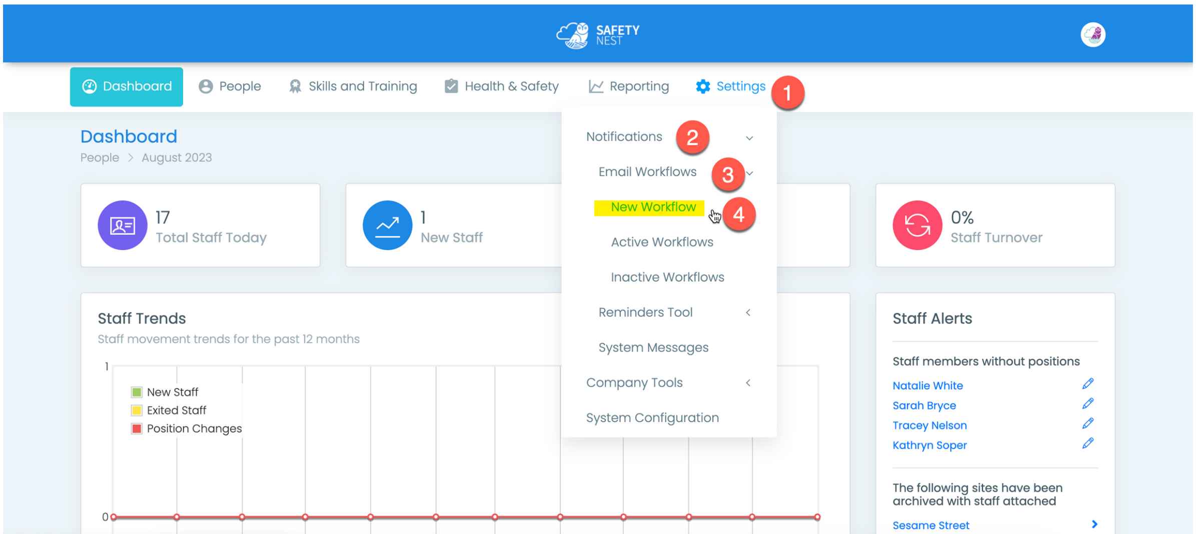
Let's start by adding a new email workflow. These are very useful to create for notifying key staff when something has/hasn't happened.

For example: to remind a staff member to do a safety check, if it wasn't completed at its expected time.

So, before you set up your email workflows, you will want to consider who you need to notify for what.

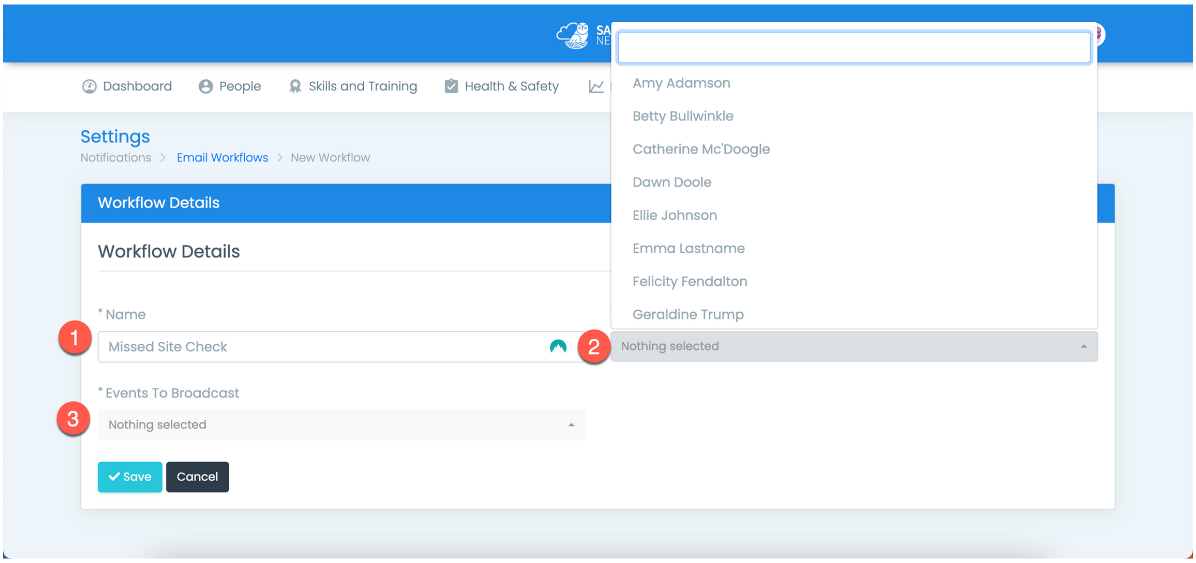
For example: you might want to notify separate people if there is an illness, than if there is an injury. So, those would need to be two different workflows.

1 **To create a new email workflow, go to Settings > Notifications > Email Workflows > New Workflow:**



2 **Then, there are 3 things you will need to set up:**

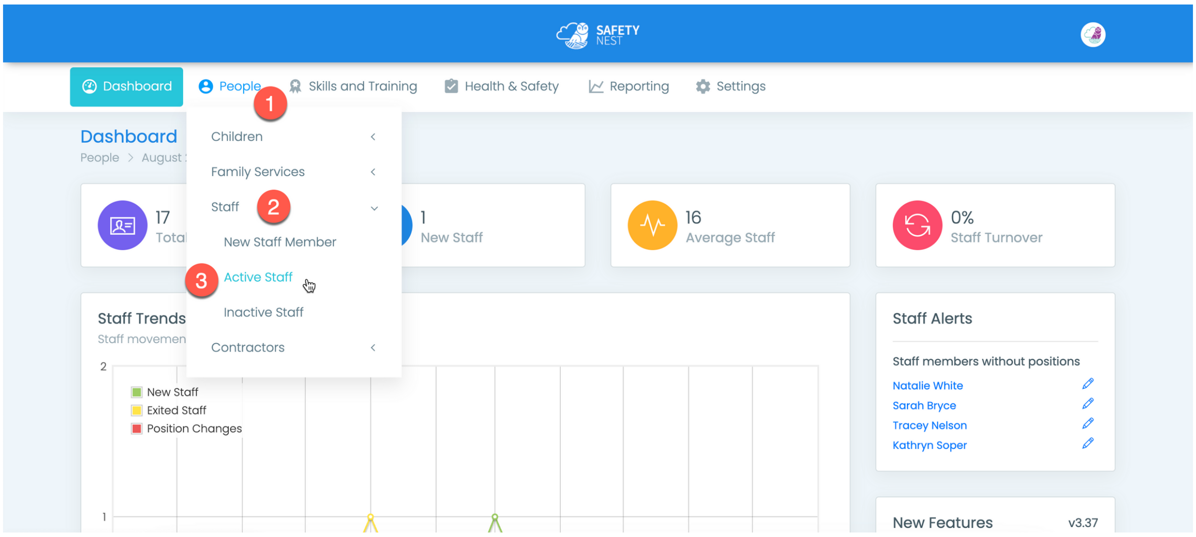
1. Give the workflow a name
2. Decide which team members you'd like to be notified
3. Select an event report that relates to this reminder



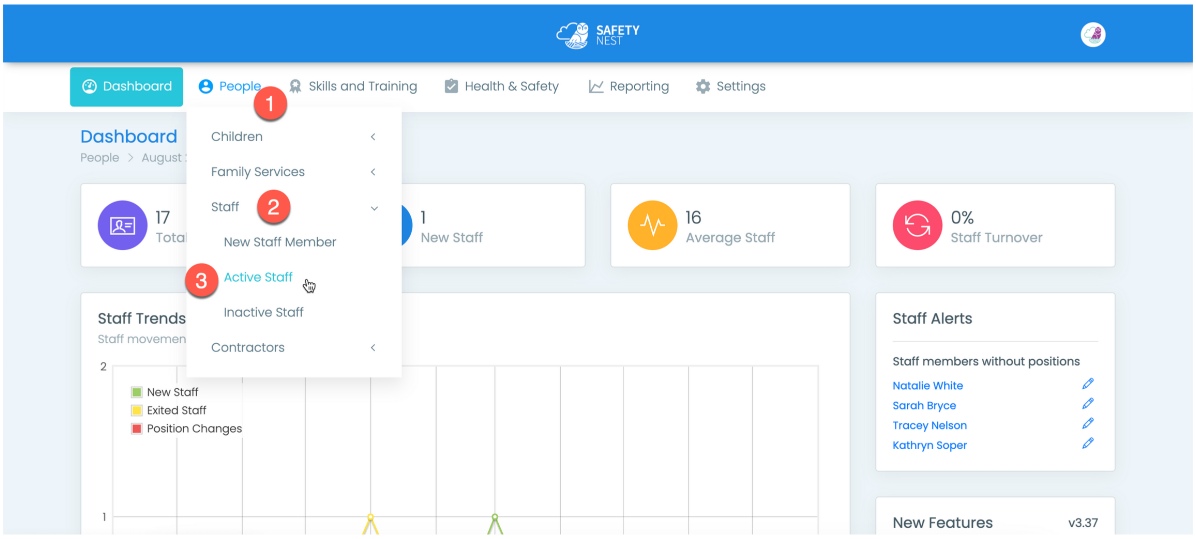
3 **When you've finished, click save, and repeat for all other email reminders you'd like to set up.**

How To: GIVE SAFETYNEST ACCESS TO INDIVIDUAL TEAM MEMBERS

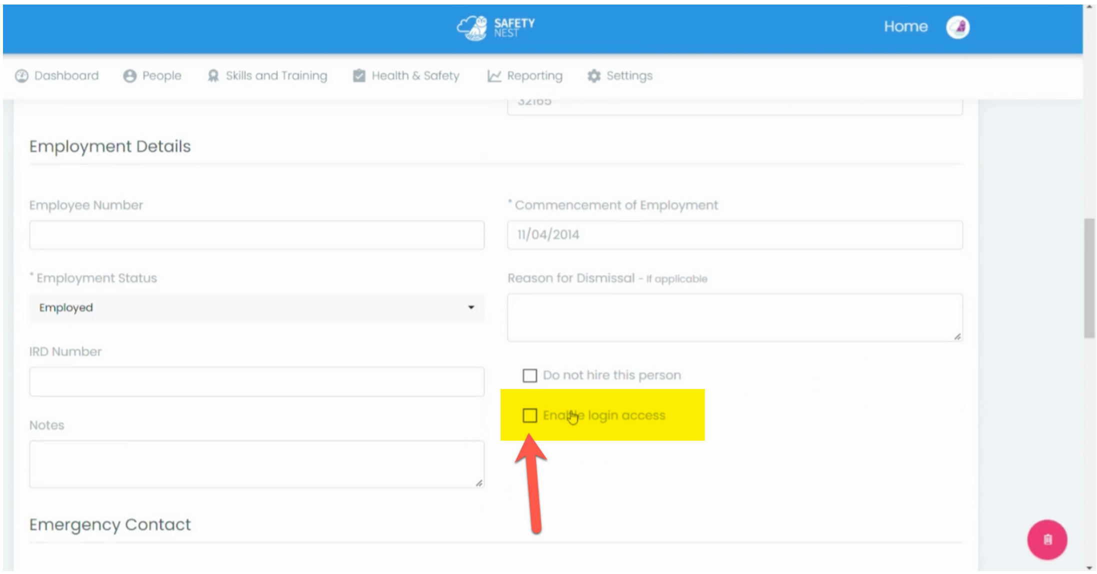
1 **To setup SafetyNest access for a team member, go to People > Staff > Active Staff: (Teachers all share the same login, individual access is for other senior staff, staff responsible for H&S or any admin staff as needed)**



2 **Once there, find the staff member you would like to give access to and click "edit":**

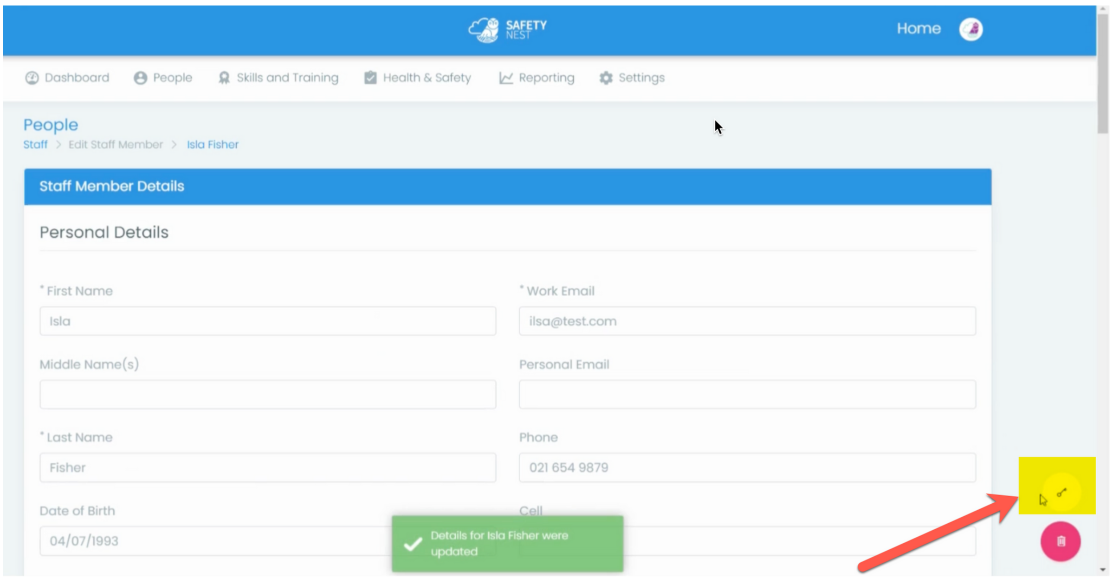


3 **Scroll down until you see the "enable login access" area, and click it to enable login access:**



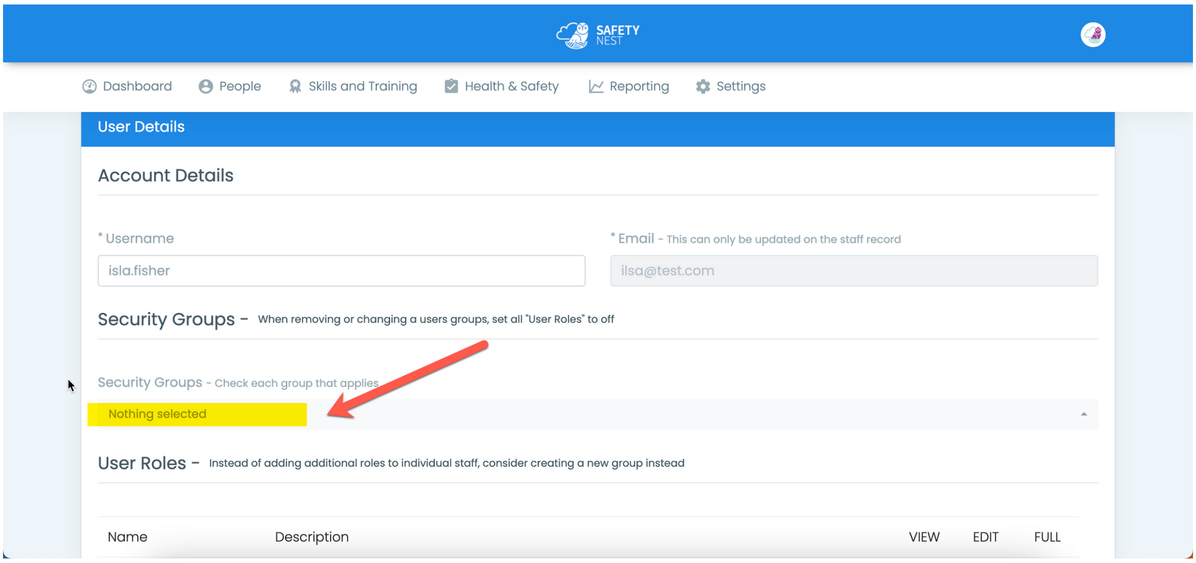
4 **Then scroll down and push "save".**

5 **Once you have saved, you will notice a "key" icon appear over the right hand side:**



6 **Click on this key to setup the user's security settings:**

7 Here you will want to assign a security group:

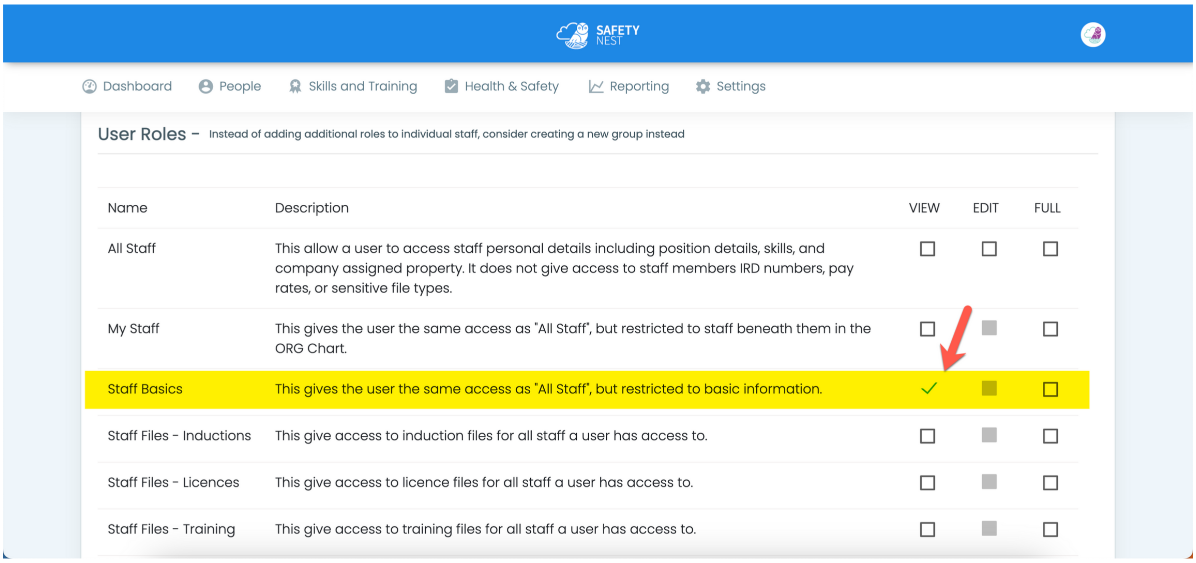


For example: "teacher"

Assigning a security group will automatically assign access to features.

8 However, you can also manually turn on and off features that the user will have access to future down, in the user roles section:

9 Simply select whether you would like the user to have view, edit or full access to the features:

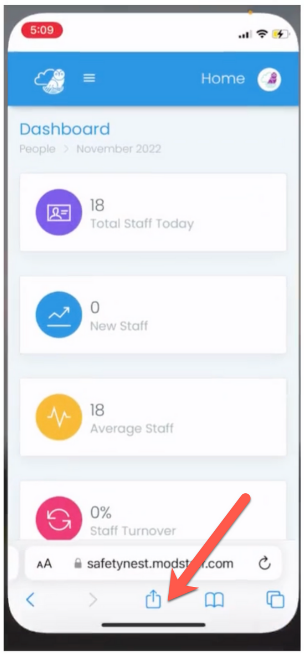


10 Once you've finished assigning access, remember to scroll down to the bottom of the list and click "save".

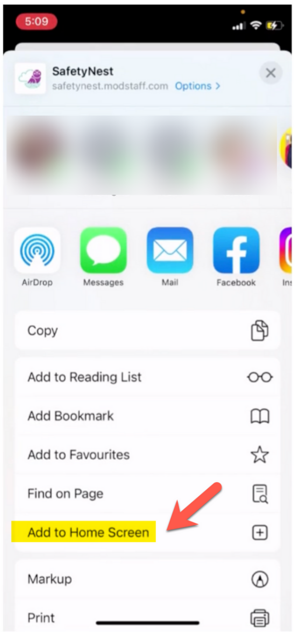
How To: ADD SAFETYNEST TO YOUR HOME SCREEN

Here's how to add your new SafetyNest site to your iPhone or iPad Home Screen using Safari:

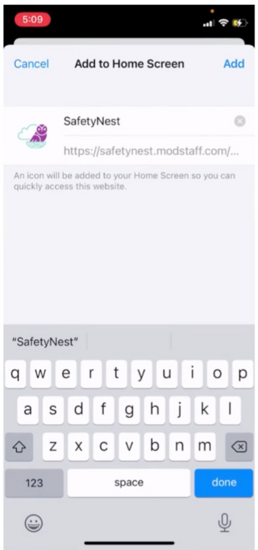
1. Open your site in Safari
2. Click on the icon which is a square with an arrow pointing up:



3. Click on "add to home screen"



4. Give it a name, such as "SafetyNest"



5. Click "add"

Android tablets/phones and other internet browsers will work in a similar way

CONGRATULATIONS

YOU HAVE CONFIGURED YOUR SAFETYNEST SITE!

Now that you've configured your site wide administration settings, it's time to empower your team to simplify and streamline every aspect of health and safety management.

The Teachers manual is designed to be shared with your team, so that they can learn their way around their new tool as quickly and easily as possible.

You are now ready to move on to Part Two!