



D A M S T R A

Update Worker
Medical Records
(Manual Method)

Safety



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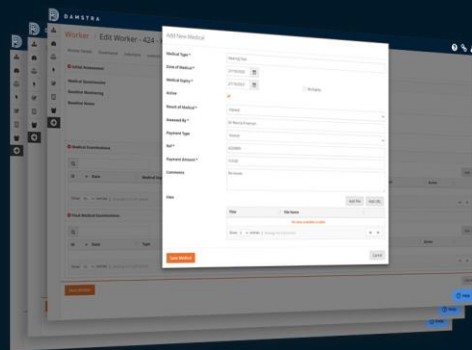
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Update Medical Records Introduction

Damstra Safety provides the ability to store details of Medical Examinations for individual workers to keep track of the health of your people during their time with your Organisation. The procedure for this is common to all Worker Types, namely:

- Workers
- Contracted Workers
- Other Person Types that your Organisation may have enabled via Settings

Records may be added manually record-by-record, or imported in bulk. In this video, we'll explain the manual method, using a Worker in the Worker Register, help with the bulk import method is available separately in the support portal.



Manual Method

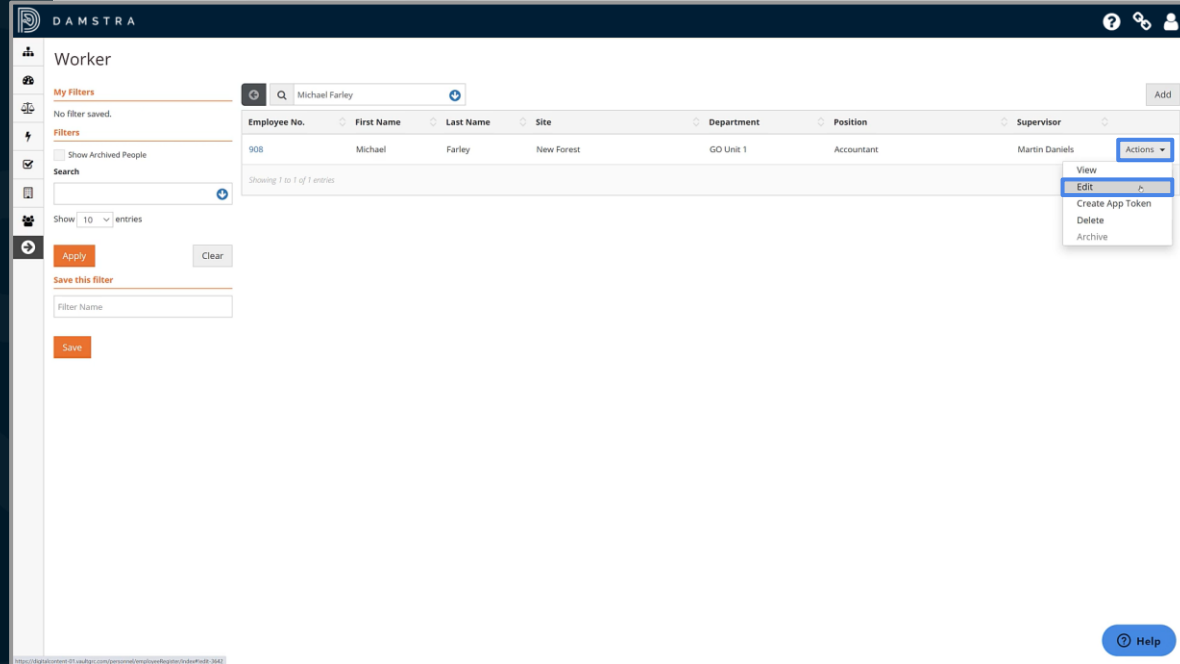


Bulk Import Method

Update Medical Records Worker Register

Updating a Worker's Medical Records is done via the *Worker Register*, this is found under *People* in the *Menu bar*.

Locate the Worker involved and **Click** '*Actions*', then '*Edit*'.



The screenshot displays the DAMSTRA Worker Register interface. On the left is a sidebar with a 'Menu bar' containing icons for 'People', 'My Filters', 'Filters', 'Search', and 'Show'. The main area is titled 'Worker' and features a search bar with 'Michael Farley' entered. Below the search bar is a table with columns: Employee No., First Name, Last Name, Site, Department, Position, and Supervisor. The table contains one entry for Michael Farley (Employee No. 908, Site New Forest, Department GO Unit 1, Position Accountant, Supervisor Martin Daniels). An 'Actions' dropdown menu is open for the first entry, showing options: View, Edit (highlighted), Create App Token, Delete, and Archive. Below the table are buttons for 'Apply', 'Clear', 'Save this filter', and 'Save'. A 'Help' button is located in the bottom right corner.

Employee No.	First Name	Last Name	Site	Department	Position	Supervisor
908	Michael	Farley	New Forest	GO Unit 1	Accountant	Martin Daniels

Update Medical Records

Initial Assessment

Click the *Medical* tab.

There are three sections to the Medical tab: *Initial Assessment*, *Medical Examinations* and *Final Medical Examinations*.

The *Initial Assessment* section is where information about the Worker's health at the point that they joined the organisation is typically stored.

Tick the Medical Questionnaire check-box if your organisation requires one and the Worker has completed this.

The screenshot shows the DAMSTRA web application interface. The top navigation bar is dark blue with the DAMSTRA logo and name. Below it, a breadcrumb trail reads "Worker / Edit Worker - 908 - Michael Farley". A horizontal menu contains several tabs: "Worker Details", "Governance", "Inductions", "Licences", "Training", "PPE", "Medical" (highlighted with a blue border), "Reviews / Notes", "Contact Details", and "Related". On the left side of the main content area, there is a vertical sidebar with icons for various functions, including a right-pointing arrow icon which is currently selected. The main content area is titled "Initial Assessment" with a red minus icon. It contains three sections: "Medical Questionnaire" with a checkbox, "Baseline Monitoring" with a checkbox, and "Baseline Notes" with a text input field. Below these is an orange "Attach File" button. At the bottom of the main content area, there is a section titled "Medical Examinations" with a red minus icon and a search bar.

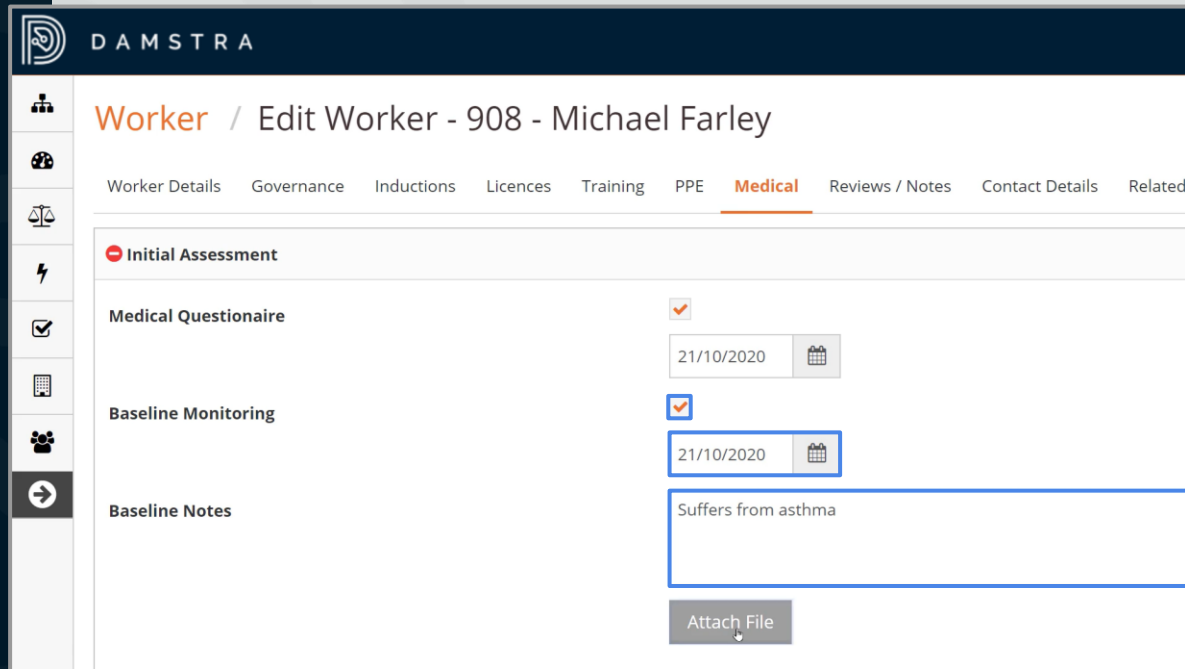
Update Medical Records

Initial Assessment cont.

If there are any issues material to your organisation with the Worker's health that need to be monitored, **tick** the '*Baseline Monitoring*' check-box.

Enter the date that this was noted, then supply details about the issue in the '*Baseline Notes*' free-text field.

To attach a copy of any files relating to the initial assessment, **click** the '*Attach File*' button and locate the file. A copy will be added to the record.



DAMSTRA

Worker / Edit Worker - 908 - Michael Farley

Worker Details Governance Inductions Licences Training PPE **Medical** Reviews / Notes Contact Details Related

Initial Assessment

Medical Questionnaire ☒ 21/10/2020

Baseline Monitoring ☒ 21/10/2020

Baseline Notes
Suffers from asthma

Attach File

Update Medical Records

Adding a Medical Examination

The 'Medical Examinations' section is where we can record the details of medical examinations that take place during a Workers employment with your Organisation, and their outcomes.

To record the details of a new Medical Examination, **click 'Add'**.

The screenshot shows the DAMSTRA interface for editing a worker's medical records. The worker is Michael Farley (ID 908). The 'Medical' tab is selected, showing the 'Initial Assessment' section with fields for 'Medical Questionnaire' and 'Baseline Monitoring', both dated 21/10/2020. The 'Baseline Notes' field contains 'Suffers from asthma'. Below this is the 'Medical Examinations' section, which contains a table of past examinations. The table has columns for ID, Date, Medical Expiry, Type, Result of Medical, Assessed By, Notes, View Attachment, and Active. Two examinations are listed: ID 2668 (Drug and Alcohol, Passed, Northern Community Laboratory) and ID 2667 (Eyesight Test, Passed, Dr Maxine Fletcher). The 'Add' button is visible in the top right corner of the table. Below the table is the 'Final Medical Examinations' section, which is currently empty.

Worker / Edit Worker - 908 - Michael Farley

Worker Details Governance Inductions Licences Training PPE **Medical** Reviews / Notes Contact Details Related Responsibilities

Initial Assessment

Medical Questionnaire ☒ 21/10/2020

Baseline Monitoring ☒ 21/10/2020

Baseline Notes Suffers from asthma

[Attach File](#) [Initial Assess...](#)

Medical Examinations

ID	Date	Medical Expiry	Type	Result of Medical	Assessed By	Notes	View Attachment	Active	
2668	21/10/2020	21/10/2021	Drug and Alcohol	Passed	Northern Community Laboratory	Results are clear		☒	Actions
2667	21/10/2020	21/07/2022	Eyesight Test	Passed	Dr Maxine Fletcher	Good vision, no need for any		☒	Actions

Show 10 entries | Showing 1 to 2 of 2 entries

Final Medical Examinations

ID	Date	Type	Result of Medical	Assessed By	Notes	View Attachment	Active
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Show 10 entries | Showing 0 to 0 of 0 entries

[Add](#) [Help](#)

Update Medical Records

Adding a Medical Examination cont.

Populate the form, completing all mandatory and relevant fields as you go.

In the *Medical Type* field, begin **typing** the name of the Medical Examination undertaken. Smart Search will help as you type. The choices available here are set by your Organisation in Settings. Help with making changes to these choices is available in the Support Portal.

Enter the date of the Medical.

If the Medical is required to be repeated in the future, **enter** the Medical expiry date. Otherwise, **click** 'No Expiry'.

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Governance Inductions Licences

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Date

Medical Exp

21/10/2020

21/10/2020

21/07/2022

entries | Showing 1 to 2 of 2 entries

cal Examinations

Add New Medical

Medical Type * Hearing Test

Date of Medical * 22/10/2020

Medical Expiry * 22/10/2021 ☐ No Expiry

Active ☒

Result of Medical * -- Please Select --

Assessed By *

Payment Type -- Please Select --

Payment Amount

Comments

Files

Add File Add URL

Title File Name

No data available in table

Show 5 entries | Showing 0 to 0 of 0 entries

Save Medical Cancel

View Attachment Active

Update Medical Records

Adding a Medical Examination cont.

Tick the *Active* check-box if you'd like an escalation to be generated when the expiry date for this Medical Examination nears.

Record the result of the medical by **selecting** it from the picklist. Again, the choices available are set by your Organisation in Settings.

Then, **enter** the name of the person who performed the assessment.

Add New Medical

Medical Type * Hearing Test

Date of Medical * 22/10/2020

Medical Expiry * 22/10/2021 ☐ No Expiry

Active ☒

Result of Medical * Passed

Assessed By * Dr Anthony French

Payment Type -- Please Select --

Payment Amount

Comments

Files

Add File Add URL

Title	File Name
No data available in table	

Show 5 entries | Showing 0 to 0 of 0 entries

Save Medical Cancel

Update Medical Records

Adding a Medical Examination cont.

Payment Type for the Medical is an optional field. If your organisation chooses to record this detail, **select** it from the pick-list.

Depending on the option selected, additional fields may appear. For example, if *'Invoice'* is selected, a field for the invoice reference appears. If *'Voucher'* is selected, a further *'Type'* drop-down appears.

Enter the Payment Amount.

The Comments field allows any relevant notes to be added as free-text.

Add New Medical

Medical Type * Hearing Test

Date of Medical * 22/10/2020

Medical Expiry * 22/10/2021 ☐ No Expiry

Active ☒

Result of Medical * Passed

Assessed By * Dr Anthony French

Payment Type Cash

Payment Amount * 95.00

Comments No issues found

Files

Title	File Name
No data available in table	

Show 5 entries | Showing 0 to 0 of 0 entries

Save Medical Cancel

Update Medical Records

Adding a Medical Examination cont.

To attach any related files, for example a copy of the Medical Examination report, either **click** 'Add File' to store a copy of the file in your system, or **click** 'Add URL' to add a link to a file that is stored elsewhere.

Once all relevant details are enter, **click** 'Save Medical'.

DAMSTRA

Worker / Edit Worker - 908 -

Worker Details Governance Inductions Licences

Initial Assessment

Medical Questionnaire

Baseline Monitoring

Baseline Notes

Medical Examinations

Final Medical Examinations

Add New Medical

Medical Type * Hearing Test

Date of Medical * 22/10/2020

Medical Expiry * 22/10/2021 ☐ No Expiry

Active ☒

Result of Medical * Passed

Assessed By * Dr Anthony French

Payment Type Cash

Payment Amount * 95.00

Comments No issues found

Files

[Add File](#) [Add URL](#)

Title	File Name	
M Farley - Audiogram results.png	M Farley - Audiogram results.png	Delete
Audiogram report.doc	Audiogram report.doc	Delete

Show 5 entries | Showing 1 to 2 of 2 entries

[Save Medical](#) [Cancel](#)

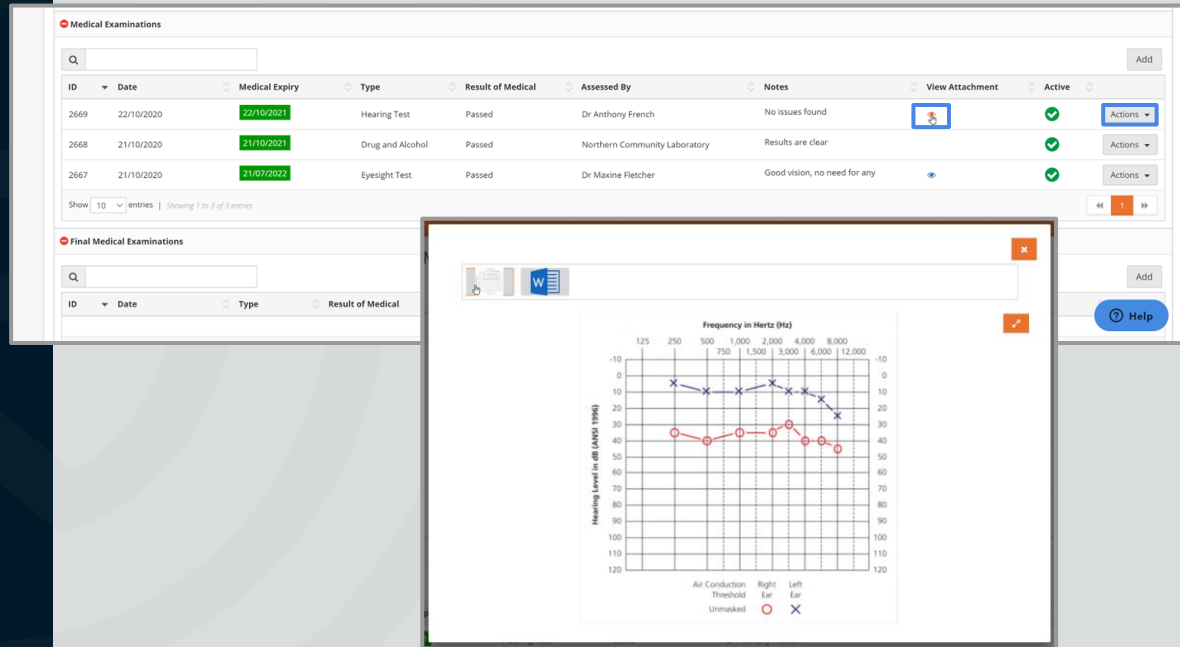
Update Medical Records

Edit / Delete / View Attachment

Once one or more Medical Examinations have been added to a Worker record, you'll find a summary of each examination in the *Medical Examinations* table.

To edit or delete a record, **click** the 'Actions' button and make the appropriate selection.

To view any attachments, **click** the  icon to open the gallery and **select** the thumbnail for the file you'd like to view. Some file types such as PDFs and images may be viewed within the gallery, others such as Microsoft Word files must be downloaded and opened within the relevant application.



The screenshot displays the 'Medical Examinations' table with the following data:

ID	Date	Medical Expiry	Type	Result of Medical	Assessed By	Notes	View Attachment	Active	Actions
2669	22/10/2020	22/10/2021	Hearing Test	Passed	Dr Anthony French	No issues found		✓	Actions
2668	21/10/2020	21/10/2021	Drug and Alcohol	Passed	Northern Community Laboratory	Results are clear		✓	Actions
2667	21/10/2020	21/07/2022	Eyesight Test	Passed	Dr Maxine Fletcher	Good vision, no need for any		✓	Actions

Below the table is a section for 'Final Medical Examinations' which is currently empty. An inset window shows an audiogram graph titled 'Frequency in Hertz (Hz)' with the Y-axis 'Hearing Level in dB (ANSI 1996)' ranging from -10 to 120. The graph plots 'Air Conduction Threshold' (blue 'X' markers) and 'Unmasked' (red circle markers) for both 'Right Ear' and 'Left Ear'. The legend indicates: Air Conduction Threshold (blue 'X'), Right Ear (blue circle), Left Ear (red circle), and Unmasked (red circle).

Update Medical Records

Final Medical Examination

If your organisation requires a Final Medical Examination when a Worker leaves, the details can be recorded in the 'Final Medical Examinations' section.

Click 'Add' to enter the details. The form is identical to a normal Medical Examination form, however there is no Expiry Date to supply.

Once all relevant details have been entered, **click 'Save Worker'**.

The screenshot shows a software interface for medical records. The top section is titled 'Initial Assessment' and contains three sub-sections: 'Medical Questionnaire' with a date of 21/10/2020, 'Baseline Monitoring' with a date of 21/10/2020, and 'Baseline Notes' with the text 'Suffers from asthma'. Below these is an 'Attach File' button and an 'Initial Assessment' button. The middle section is titled 'Medical Examinations' and features a table with columns: ID, Date, Medical Expiry, Type, Result of Medical, Assessed By, Notes, View Attachment, and Active. The table contains three entries. The bottom section is titled 'Final Medical Examinations' and is currently empty, with a message 'No data available in table'. At the bottom of the interface are buttons for 'Save Worker', 'Cancel', and 'Help'.

ID	Date	Medical Expiry	Type	Result of Medical	Assessed By	Notes	View Attachment	Active
2669	22/10/2020	27/10/2021	Hearing Test	Passed	Dr Anthony French	No issues found		✓
2668	21/10/2020	21/10/2021	Drug and Alcohol	Passed	Northern Community Laboratory	Results are clear		✓
2667	21/10/2020	21/07/2022	Eyesight Test	Passed	Dr Maxine Fletcher	Good vision, no need for any		✓

