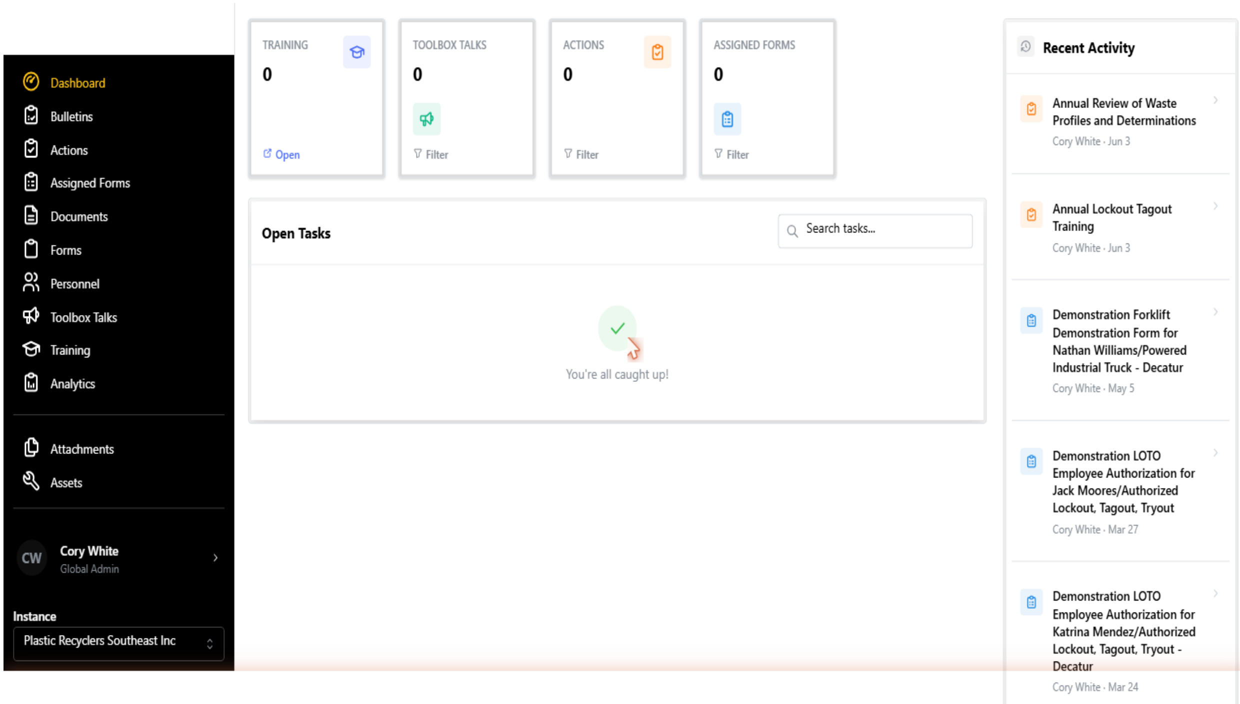
# General User How-To Guide

Step-by-step instructions for everyday ProactEHS tasks

June 2026

# Getting Started: The ProactEHS Dashboard

When you log in to ProactEHS, the first thing you see is your Dashboard. This is your home base — it gives you a quick summary of everything you need to pay attention to.




The dark left sidebar contains your navigation. Click any module name to go to that section. The summary cards at the top of the Dashboard show counts for:

- Training — courses assigned to you that need to be completed.
- Toolbox Talks — safety briefings assigned to you.
- Actions — tasks assigned to you.
- Assigned Forms — forms you need to fill out and submit.

Click the Open link on any summary card to jump directly to that module and see your open items. The Open Tasks section below the cards lists everything that is currently waiting for you.

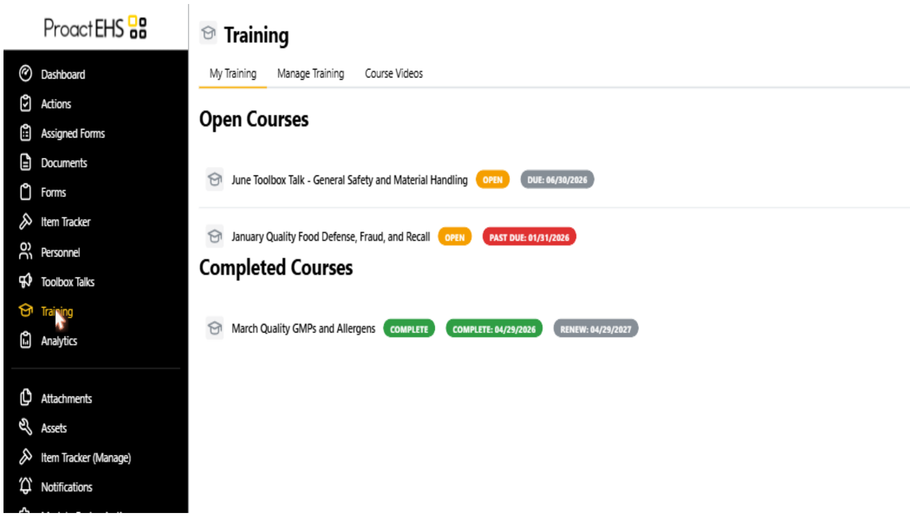
ℹ **Tip:** Check your Dashboard at the start of each day to see if anything is overdue or due soon. Items marked with a red PAST DUE badge need your attention right away.

# Completing a Training Course

When your administrator assigns a training course to you, it will appear in your Training module. You must complete the course by the due date shown. Overdue courses are highlighted in red.

## Finding Your Assigned Courses

1. Click Training in the left sidebar.
2. You will land on the My Training tab. This is your personal training list — it is different from the Manage Training tab which is for admins.

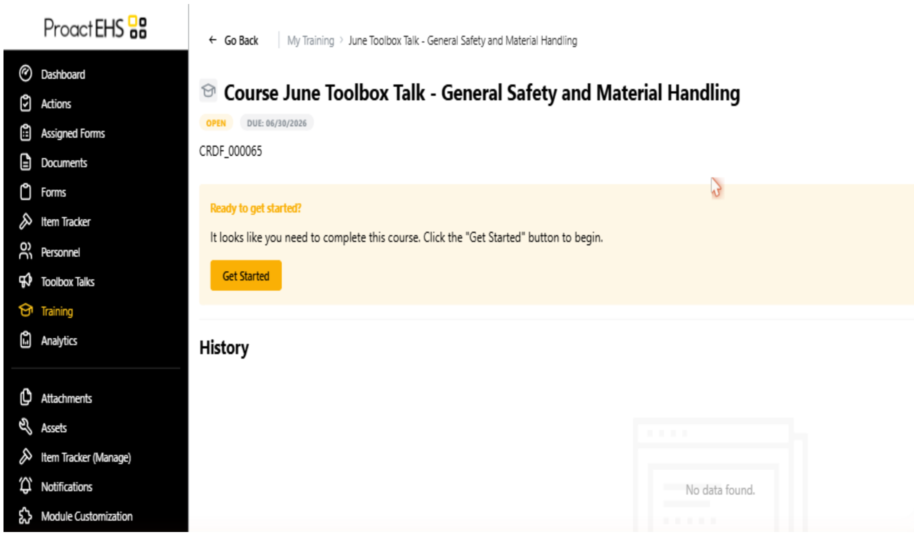



3. The page shows two sections:
   - Open Courses — courses assigned to you that you have not yet completed. These show an OPEN badge and a due date.
   - Completed Courses — courses you have already finished. These show a COMPLETE badge, the date you completed it, and a renewal date if applicable.

> **Note:** If a course shows a red PAST DUE badge, it means the deadline has already passed. Complete it as soon as possible and notify your supervisor.

## Starting and Completing a Course

1. In the Open Courses section, click anywhere on the course row to open it.




2. The course page shows the course name, its status (OPEN), and your due date.
3. Click the yellow Get Started button to begin the course.
4. Work through all course content — this may include lessons to read, videos to watch, quizzes to answer, or demonstrations to complete. The course will tell you what steps remain.
5. After completing all required steps, the course will automatically be marked COMPLETE. It will move from Open Courses to Completed Courses on your My Training page.

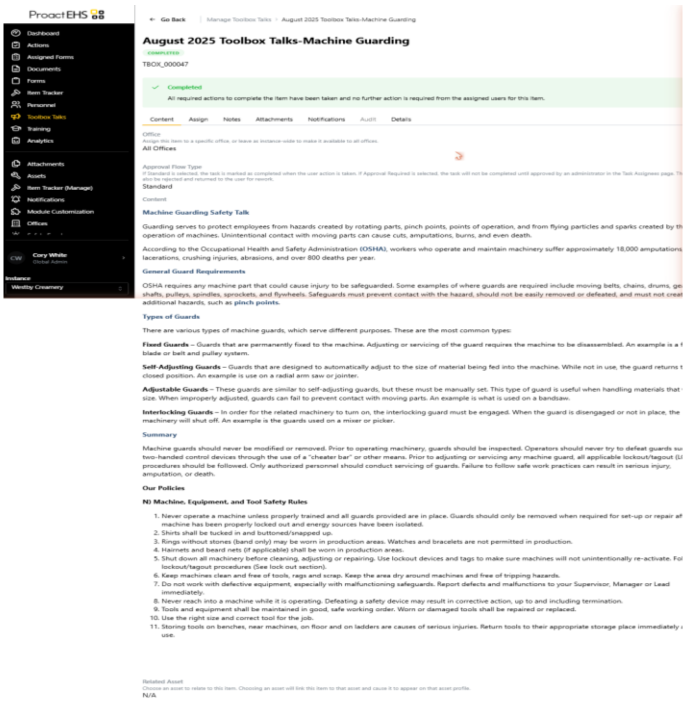
**Note:** Some courses require supervisor approval before they are officially marked complete. If yours does, you will see a PENDING APPROVAL status after finishing. Your supervisor will be notified to review and approve.

**Tip:** If you need to pause partway through a course, your progress is saved. Come back and click the course again to continue where you left off.

# Completing a Toolbox Talk

Toolbox Talks are short safety briefings assigned to you by your administrator. You must read the content and acknowledge that you have understood it. They usually need to be completed within a set number of days.

1. Click Toolbox Talks in the left sidebar.
2. Your list of assigned Toolbox Talks will appear. Open ones show an OPEN badge with a due date.
3. Click on the Toolbox Talk you want to complete to open it.




4. Read through the full content of the briefing carefully.
5. At the bottom of the page, you will see an Acknowledgment section. Click the yellow Mark as Complete button to confirm you have read and understood the content.
6. The Toolbox Talk will be marked COMPLETE and removed from your open tasks.

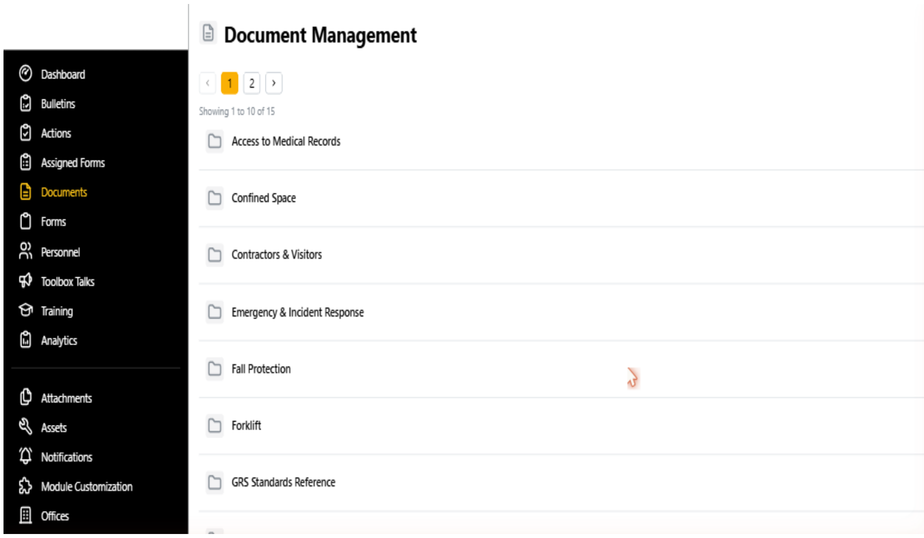
> **Note:** You cannot un-complete a Toolbox Talk. Once you click Mark as Complete, it is recorded as done.

> **ℹ Tip:** If you have questions about the content of a Toolbox Talk, ask your supervisor before acknowledging it.

# Accessing Documents

The Documents module is your organization's shared file library. It contains policies, procedures, safety data sheets, reference materials, and anything else your organization has made available to employees.

1. Click Documents in the left sidebar.



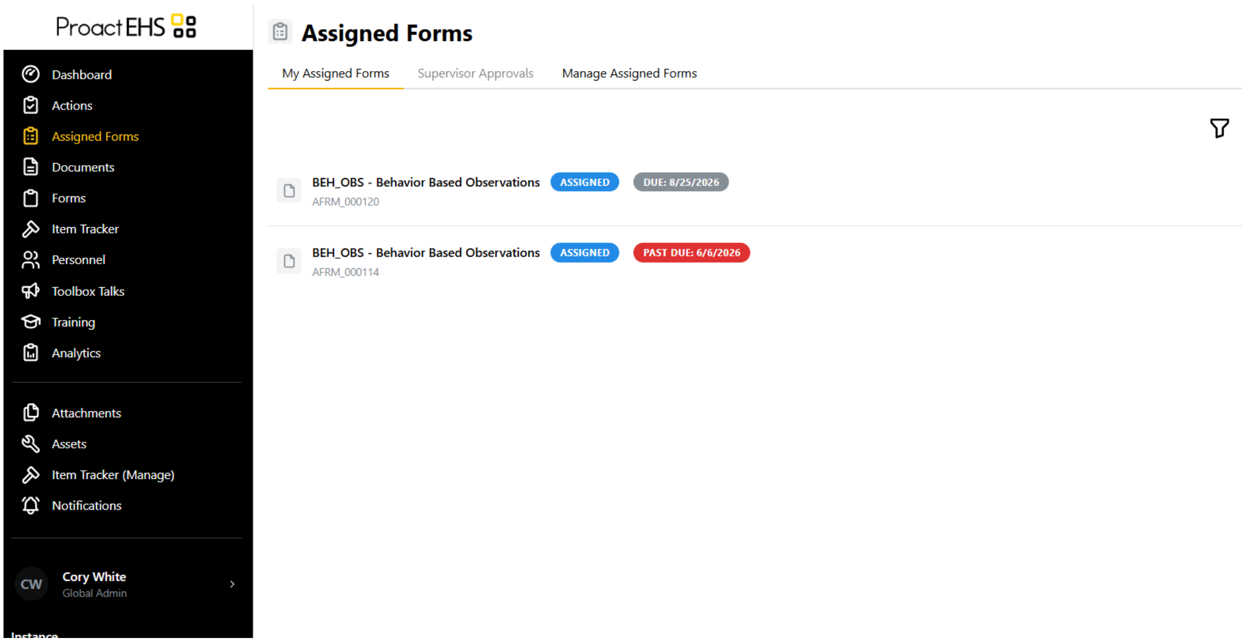

2. The Documents page shows all files available to you. You can search by file name or use the filters to find what you are looking for.
3. Click on a document name to open or download it.

> **Note:** You cannot upload or delete documents from here — that is an admin task. If you need a document added to the library, contact your administrator.

# Filling Out an Assigned Form

Forms in ProactEHS are used for safety inspections, incident reports, audits, and other structured data collection. When your administrator assigns a form to you, it appears in your Assigned Forms module with OPEN status.

1. Click Assigned Forms in the left sidebar.
2. On the Assigned Forms page, click the My Assigned Forms tab to see forms assigned to you.




3. Find the form you need to complete. Open forms show an OPEN badge and a due date. Click the arrow (→) next to it to open the form.
4. Fill in all required fields (marked with *). Required fields must be completed before you can submit.
5. Work through each section of the form. Field types include text boxes, dropdowns, date pickers, checkboxes, and signature fields.
6. When you have completed all required fields, scroll to the bottom and click Submit Form.
7. The form status will change from OPEN to SUBMITTED (or PENDING APPROVAL if your form requires supervisor review).

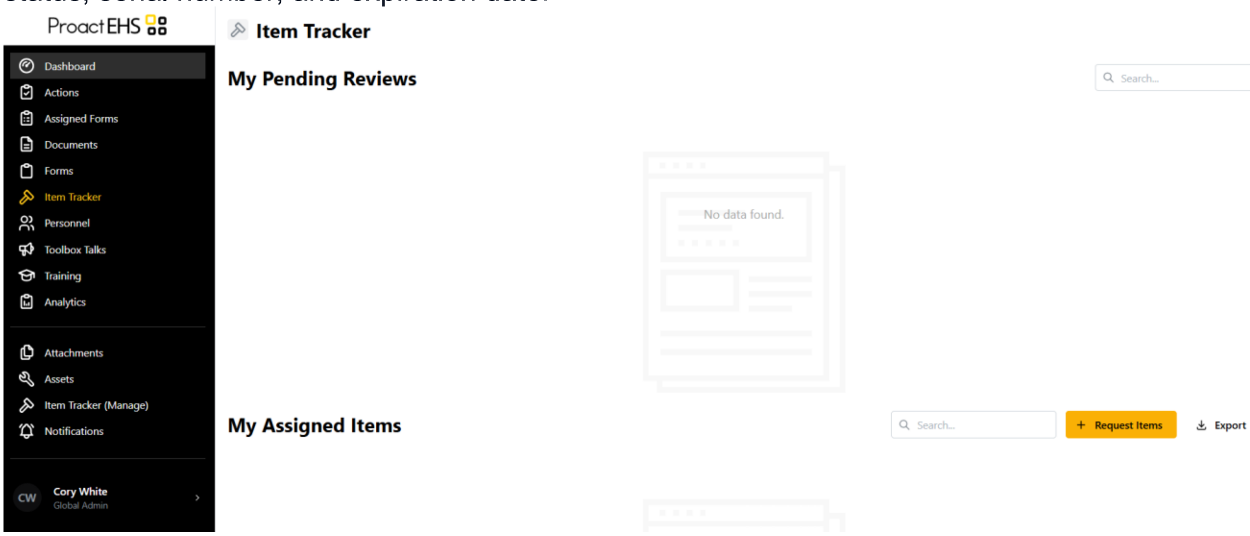
**Note:** If your form requires supervisor approval, it will show PENDING APPROVAL after you submit. Your supervisor will review and either approve or send it back for corrections.

**Tip:** If you need to save your progress and come back later, look for a Save Draft button. Not all forms have this option — if there is no Save Draft, you must complete and submit in one session.

# Using the Item Tracker

The Item Tracker shows you the PPE, equipment, or other physical items that have been assigned to you by your organization. You can also request new items through this module. Note: Item Tracker is only available in certain ProactEHS instances — if you don't see it in your sidebar, it is not enabled for your organization.

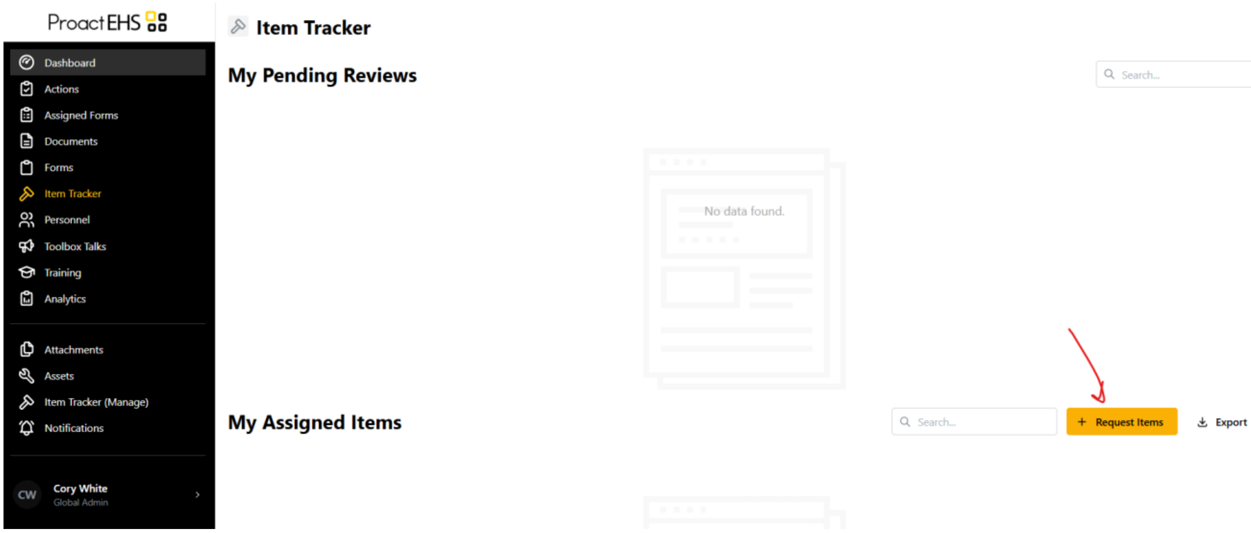
1. Click Item Tracker in the left sidebar.
2. The Item Tracker page has two sections:
   - My Pending Reviews — items that have just been assigned to you and need your acknowledgment. These will show an amber/orange banner. Click Acknowledge to confirm you received the item.
   - My Assigned Items — a full list of all items currently assigned to you, including their status, serial number, and expiration date.




3. Review the My Assigned Items table to see everything currently assigned to you. The columns show:
   - Item Name — what the item is (e.g., Safety Glasses, LOTO Locks, Boots).
   - Identifier — the unique ITDE_XXXXXX code for this item type.
   - Status — ACTIVE means the item is in good standing; expired items will show a different status.
   - Serial # — the unique serial number of your specific item (if recorded).
   - Expires — when this item is due for renewal or replacement.
   - Assigned By — the administrator who assigned this item to you.

## Requesting a New Item

1. If you need PPE or equipment that has not been assigned to you yet, click the + Request Items button (top-right of the My Assigned Items section).




2. Select the item you need from the list of available items.
3. Add any notes (e.g., size, color preference) and submit the request.
4. Your administrator will review the request and assign the item to you if approved. You will see it appear in My Assigned Items once approved.

> **Note:** Only items that your organization has set up as requestable will appear in the + Request Items list. If the item you need is not listed, contact your administrator directly.