



# Assessment Information Management

The EHSdesk™ **Assessment Information Management (AIM)** module provides an integrated assessment management process and establishes a standardized format for all audits and assessments. Assessments can be created, tracked, scheduled, and managed within EHSdesk AIM for all types of assessments, including non-checklist (general or unscheduled) assessments and those conducted by external groups and agencies. In addition, Corrective Action Requests (CARs) can be generated and tracked with the assessments.

## Features and Functionality

- AIM provides a standardized format for all types of audits and assessments
- Audit checklists and assessment plans (list of checklists that a site or business organization schedules on a regular basis) can be created and maintained
- Checklists can be grouped according to arenas (categories) and/or site
- Assessment results can be recorded at any level of the business organization
- Incomplete assessments can be saved and then finished at a later time
- Blank assessment checklists can be printed for manual mark-up
- Assessments can be viewed in Open, Incomplete, and Closed status
- Internal and/or external (EPA, OSHA, etc.) assessments can be documented and managed
- ISO elements, pictures, and process/activities can be attached to assessments
- Checklists contain free-form fields to record additional comments
- CAR is automatically generated for nonconforming answers
- Typical users include EHS Professionals, EHS Managers, Supervisors, Quality Auditors, and Operations

*Audit Results Input*

## Benefits

- Ensures well-maintained, useful data
- Establishes standard arenas, checklists, and questions and ensures the ability to apply consistent assessment criteria throughout a site or business organization
- Improves ability to manage the assessment plan to ensure limited resources are targeted at the highest risks
- Improves accountability for on-time assessment performance and corrective action follow-up
- Streamlines the audit process and helps reduce data input errors via an automated approach

### Compliance

Facilitates compliance with ISO 14001

Covers the assessment requirement of OSHA



## Reports

- Ad hoc reporting is available using a flexible search window with multiple filters and sorts; query results can be printed or saved to an Excel<sup>TM</sup> or Acrobat<sup>TM</sup> format
- Report available for Performance to Assessment Plan (% Compliant)
- E-mails containing audit information can be sent to individuals or distribution lists

## Integration Points

- EHSdesk Planning & Calendar Manager (PACmgr); scheduled assessment plan items; PACmgr can send out e-mail reminders to auditors to perform scheduled assessments
- EHSdesk Corrective Action Request (CAR); automatically trigger corrective actions from nonconforming checklist responses

## Process Flow

