

 Fermilab		Quality Section Procedures
Procedure Number/Name Human Performance Improvement (HPI) User Guide		Original Date: 22 March 2019
Written by: Dave Baird	Reviewed and Updated By: Jemila Adetunji	Date: 26 May 2020

Revision History

Author	Description of Change	Revision Date
Kathy Vuletich	Initial release	22 March 2019
Dave Baird	Update HPI user guide to reflect enhancements to HPI database.	26 May 2020

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HPI Database User Guide

Access the HPI Database via the Fermilab at Work ‘[Quick Links](#)’ or via the Quality Section or ESH Section homepages by clicking on the HPI Event Timeline, or by clicking on this link: <https://www-esh.fnal.gov/pls/apex/f?p=108>

Use your Fermi Services credentials to enter the database. If you have issues logging in, please contact the [Service Desk](#) for assistance.

You must have proper permissions in the HPI database to be able to add new HPIs and update existing HPIs. If you require access, please enter a Service Desk ticket with your request.

Click on the topic you wish to view from the Table of Contents below.

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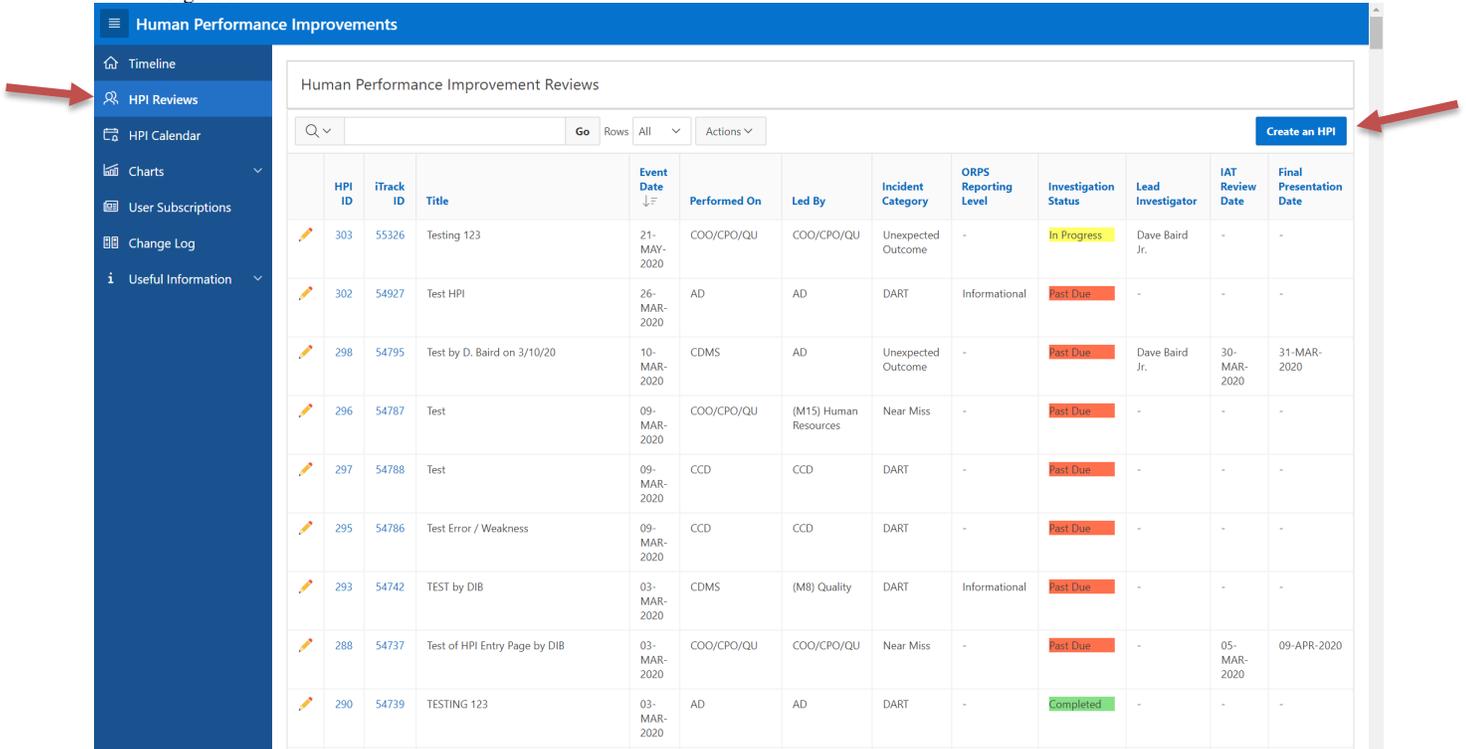
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Entering a new HPI

1. To enter a new HPI into the database click on the “HPI Reviews” tab in the left Navigation Bar and then on the blue “Create an HPI” button at the top right-hand corner of the page. (See Figure 1).

Figure 1



The screenshot shows the 'Human Performance Improvements' dashboard. On the left is a navigation menu with 'HPI Reviews' selected. The main area displays a table of 'Human Performance Improvement Reviews' with columns for HPI ID, iTrack ID, Title, Event Date, Performed On, Led By, Incident Category, ORPS Reporting Level, Investigation Status, Lead Investigator, IAT Review Date, and Final Presentation Date. A 'Create an HPI' button is visible in the top right of the table area.

HPI ID	iTrack ID	Title	Event Date	Performed On	Led By	Incident Category	ORPS Reporting Level	Investigation Status	Lead Investigator	IAT Review Date	Final Presentation Date
303	55326	Testing 123	21-MAY-2020	COO/CPO/QU	COO/CPO/QU	Unexpected Outcome	-	In Progress	Dave Baird Jr.	-	-
302	54927	Test HPI	26-MAR-2020	AD	AD	DART	Informational	Past Due	-	-	-
298	54795	Test by D. Baird on 3/10/20	10-MAR-2020	CDMS	AD	Unexpected Outcome	-	Past Due	Dave Baird Jr.	30-MAR-2020	31-MAR-2020
296	54787	Test	09-MAR-2020	COO/CPO/QU	(M15) Human Resources	Near Miss	-	Past Due	-	-	-
297	54788	Test	09-MAR-2020	CCD	CCD	DART	-	Past Due	-	-	-
295	54786	Test Error / Weakness	09-MAR-2020	CCD	CCD	DART	-	Past Due	-	-	-
293	54742	TEST by DIB	03-MAR-2020	CDMS	(M8) Quality	DART	Informational	Past Due	-	-	-
288	54737	Test of HPI Entry Page by DIB	03-MAR-2020	COO/CPO/QU	COO/CPO/QU	Near Miss	-	Past Due	-	05-MAR-2020	09-APR-2020
290	54739	TESTING 123	03-MAR-2020	AD	AD	DART	-	Completed	-	-	-

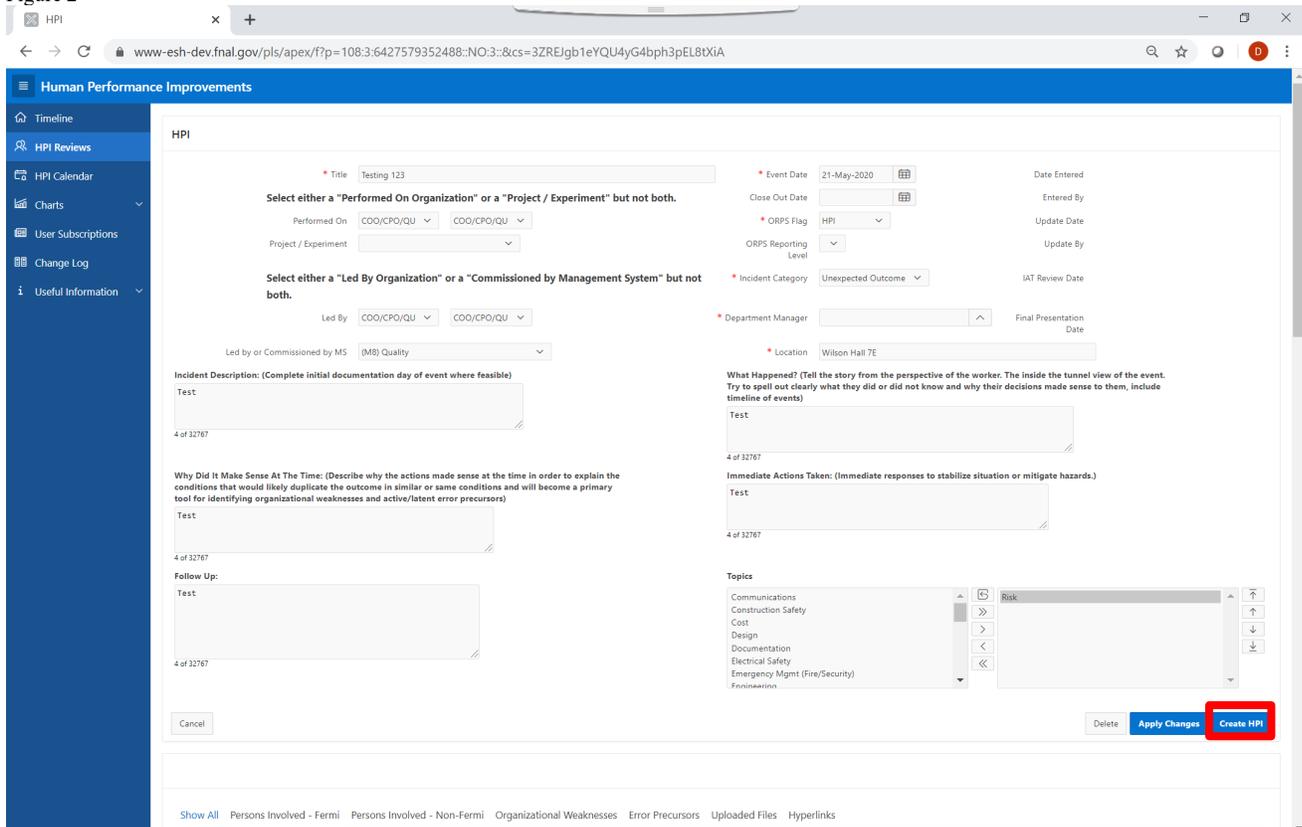
2. Enter all applicable data on the HPI Screen and click on blue “Create HPI” button.

The screen shown below will appear. All fields that are required have a red “*” next to them. These fields are required to save the HPI to the database.

		<h2 style="text-align: center;">Quality Section Procedures</h2>	
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Enter in all applicable data on the “HPI” Screen and then click on blue “[Create HPI](#)” button in the lower right corner of the screen. **Do not move to another tab before clicking “Create HPI”** or all data entered will be lost (See Figure 2).

Figure 2



Fields on the HPI Info Screen:

Field Name	Required?	Purpose
Title	Yes	Enter the title of the HPI
Event Date	Yes	Enter the date of the incident or event being reviewed
Performed on Organization or Project/Experiment	Yes, but not both.	Choose the organization or Project/Experiment from the dropdown that the review is being performed on, but not both.
Close Out Date	No	Once the HPI is complete, enter in the close out date in this field

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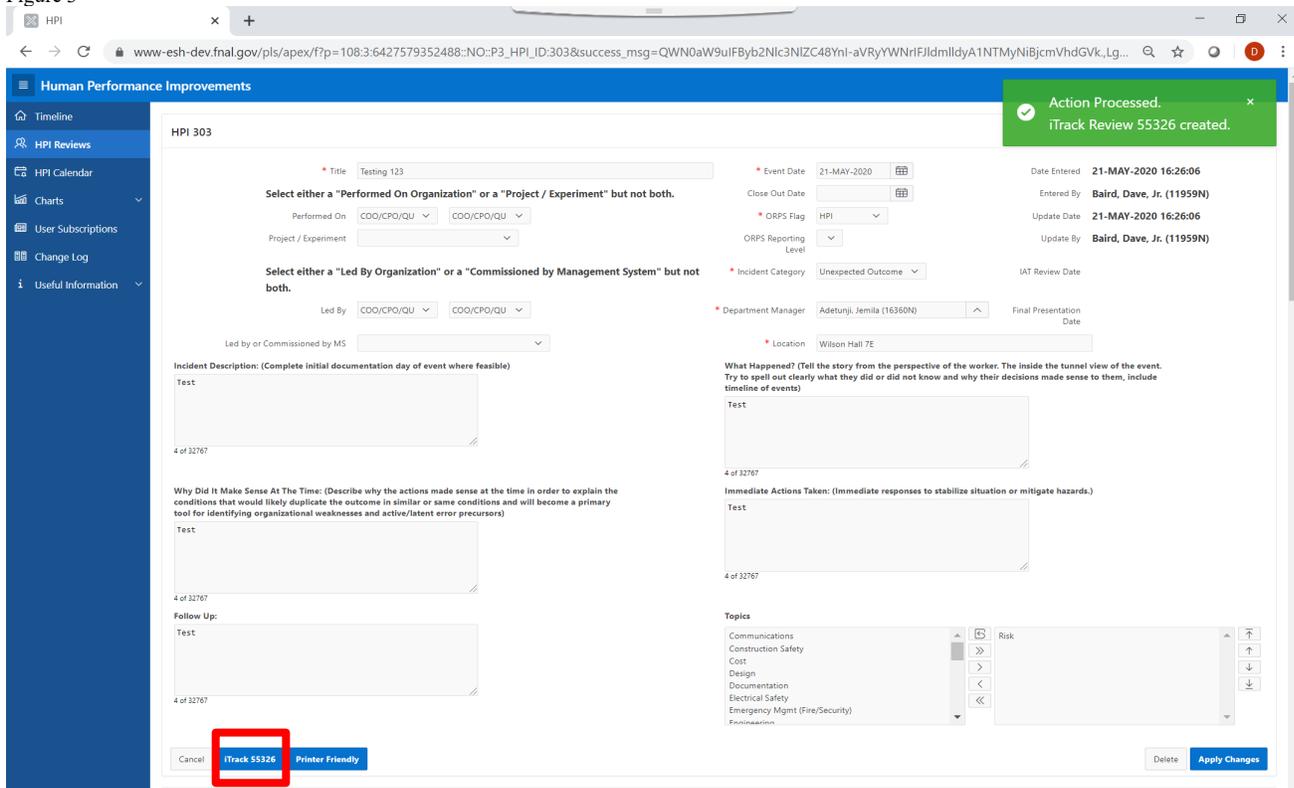
ORPS Flag	Yes	Select whether this HPI Review is an ORPS or an ORPS/NTS,
ORPS Reporting Level	N/A	If this is an ORPS, or an ORPS/NTS, select the Reporting Level of “Informational,” “Low,” or “High.”
Led by Organization or Commissioned by Management System	Yes, but not both	Choose the organization from the dropdown that the review is being performed by, but not both
Incident Category	Yes	Select the category of incident from the dropdown list
Department Manager	Yes	Using the pop-up search, enter the name or Fermilab ID of the manager of the department that the review is being performed on
Location	Yes	Enter the location of the incident being investigated. Note this is free-floating text field.
Date Entered	N/A	Auto-Generated by system
Entered By	N/A	Auto-Generated by system
Update Date	N/A	Auto-Generated by system
Updated By	N/A	Auto-Generated by system
IAT Review Date	No	Entered by the Incident Analysis Team (IAT) Subcommittee Chair
Final Presentation Date	No	Entered by the IAT Subcommittee Chair for when the HPI Lead will present results of HPI to Senior Management.
Incident Description	No	Enter in the complete initial description of the event from the day it occurred
What Happened?	No	Enter in the story from the perspective of the worker involved in the event
Why did it make sense at the time?	No	Describe why actions taken at the time of the event made sense at that time
Immediate Actions Taken	No	Enter a complete description of the actions taken at the time of the even to help stabilize the situation and mitigate risk/hazards

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Follow-Up	No	Enter in any follow-up actions required to occur from this event. Examples may include, but are not limited to, additional documents that require review, additional people to interview, etc.
Topics	No	Select all the applicable topics that the HPI investigation covers. This is beneficial for future searches, queries, and data analysis.

After creating your HPI you will receive confirmation that the “Action Processed.” and that an “iTrack Review NNNNN created.” You should also notice in the lower left-hand corner of the top box a new blue button with the corresponding iTrack number. Clicking on this button will take you to the HPI’s iTrack Review which was automatically created when the HPI was entered (See Figure 3).

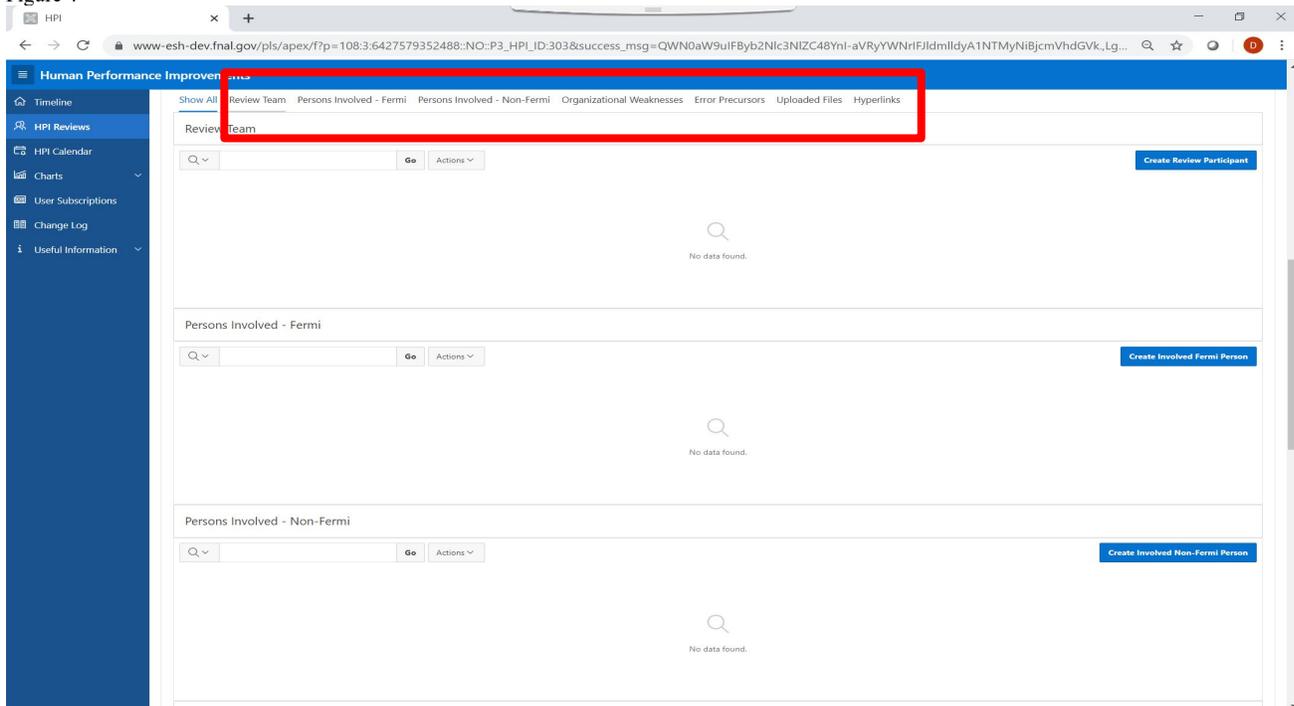
Figure 3



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On the HPI Info page, scroll down and complete the supporting information fields as necessary. (See Figure 4).

Figure 4



Field Name	Required?	Purpose
Review Team	No	Enter all the people on the review team, indicating who was the lead investigator.
Persons Involved - Fermi	No	Enter the names of the Fermilab people involved in the review.
Persons Involved – Non-Fermi	No	Enter the names of the Non-Fermilab people involved in the review (e.g., contractors and sub-contractors as needed).
Organizational Weaknesses	No	Enter all applicable Organizational Weaknesses
Error Precursors	No	Enter all applicable Error Precursors

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Causal Codes	N/A	Auto-Generated and populated from iTrack (Note: Only visible once entered in iTrack).
iTrack Items	N/A	Auto-Generated and populated by iTrack (Note: Only visible once entered in iTrack).
Uploaded Files	No	Upload any files, images, or documents related to this investigation.
Hyperlinks	No	Add any hyperlinks to documents, or other systems related to this investigation.

See the following sections for how to add and update supporting information fields:

[Add and update review team members](#)

[Add and update persons involved](#)

[Upload files](#)

[Add and update hyperlinks](#)

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How to Navigate to iTrack to Create Items & Causal Codes

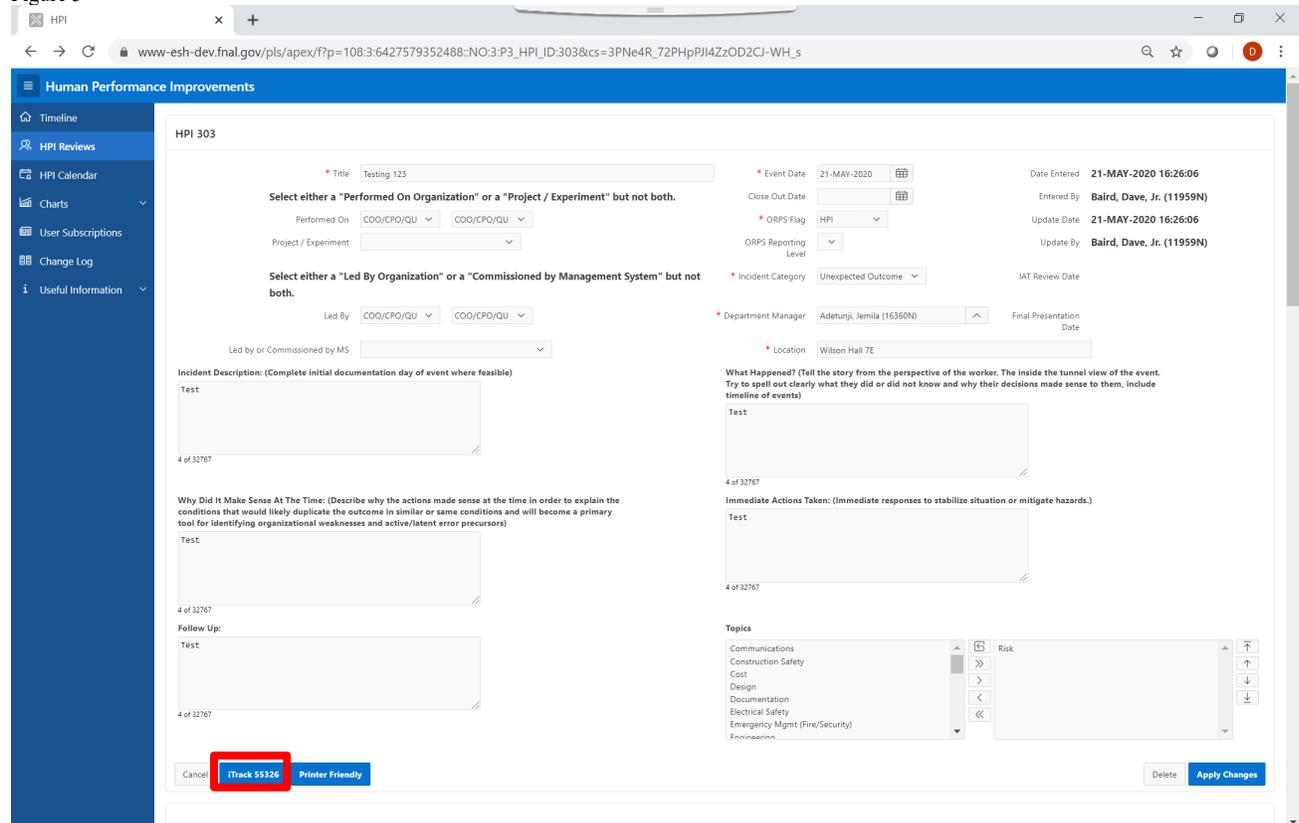
After the HPI review has been created, the system automatically generates an iTrack review for you. iTrack is where you will create:

1. Items from the review (e.g. Management Concerns, OFIs, Nonconformances, or Best Practices)
2. Causal codes from the review

To enter findings and causal codes in iTrack, please see the [iTrack Data Entry User Guide](#) and/or the [FQTS Training Course \(FN000683/CB/02\)](#) for details.

To access the iTrack review associated with a particular HPI, click on the iTrack Review link on the HPI Screen tab as seen below. (See Figure 5).

Figure 5



The iTrack Review will successfully be opened to that specific Review in the same browser tab.

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Adding/Updating Organizational Weaknesses and Error Precursors

1. Enter all applicable Organizational Weaknesses and click “Save”.

Click on the “Organizational Weaknesses” Tab.

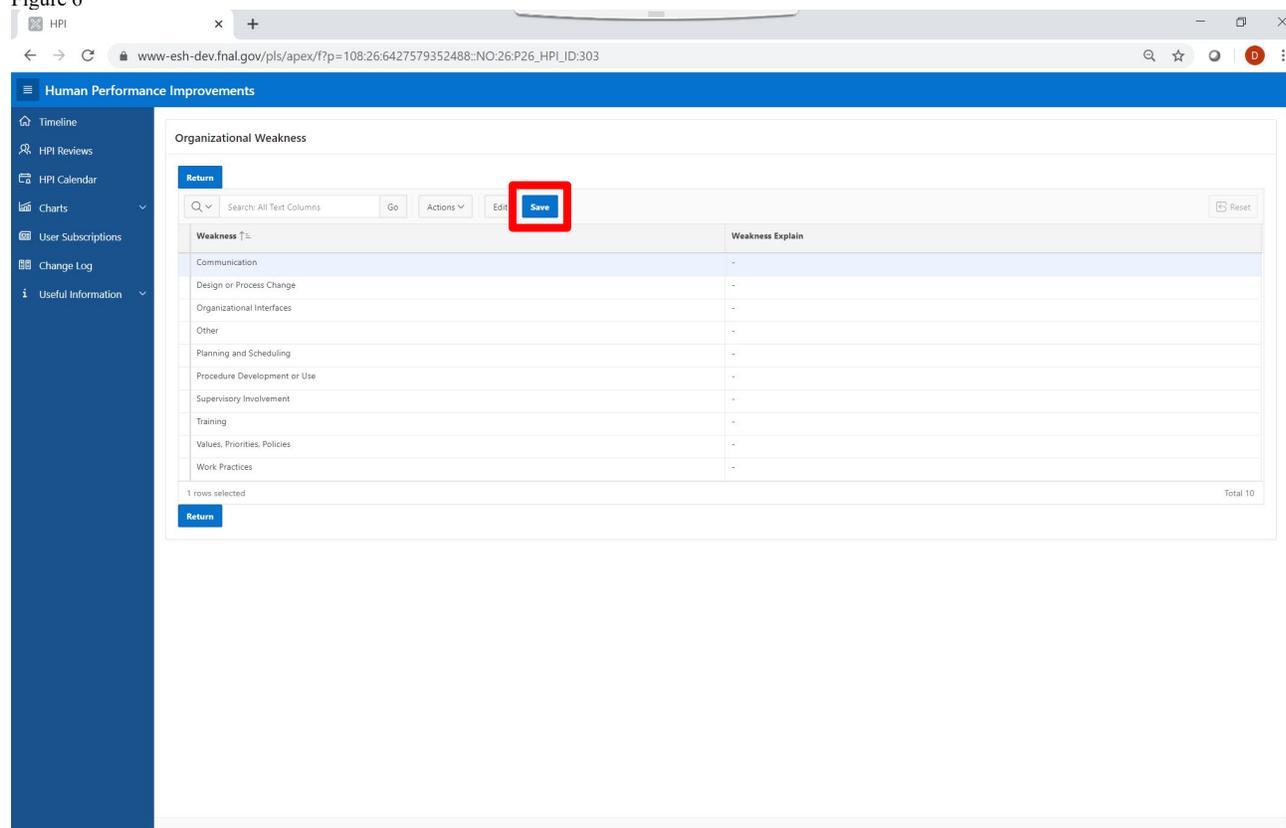
Click on the blue “[Create/Edit Organizational Weaknesses](#)” button and the page in Figure 6 below appears.

Double click or select and then click the gray “Edit” button, on the **Weakness Explain** field adjacent to the Organizational Weakness you wish to enter/update that is applicable to your investigation.

A text box appears. Enter in the supporting information for that selection.

When all data has been selected and entered in the tab, click on the blue “[Save](#)” button.

Figure 6



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2. Enter all applicable Error Precursors and click “Save”.

Click on the “Error Precursors” Tab.

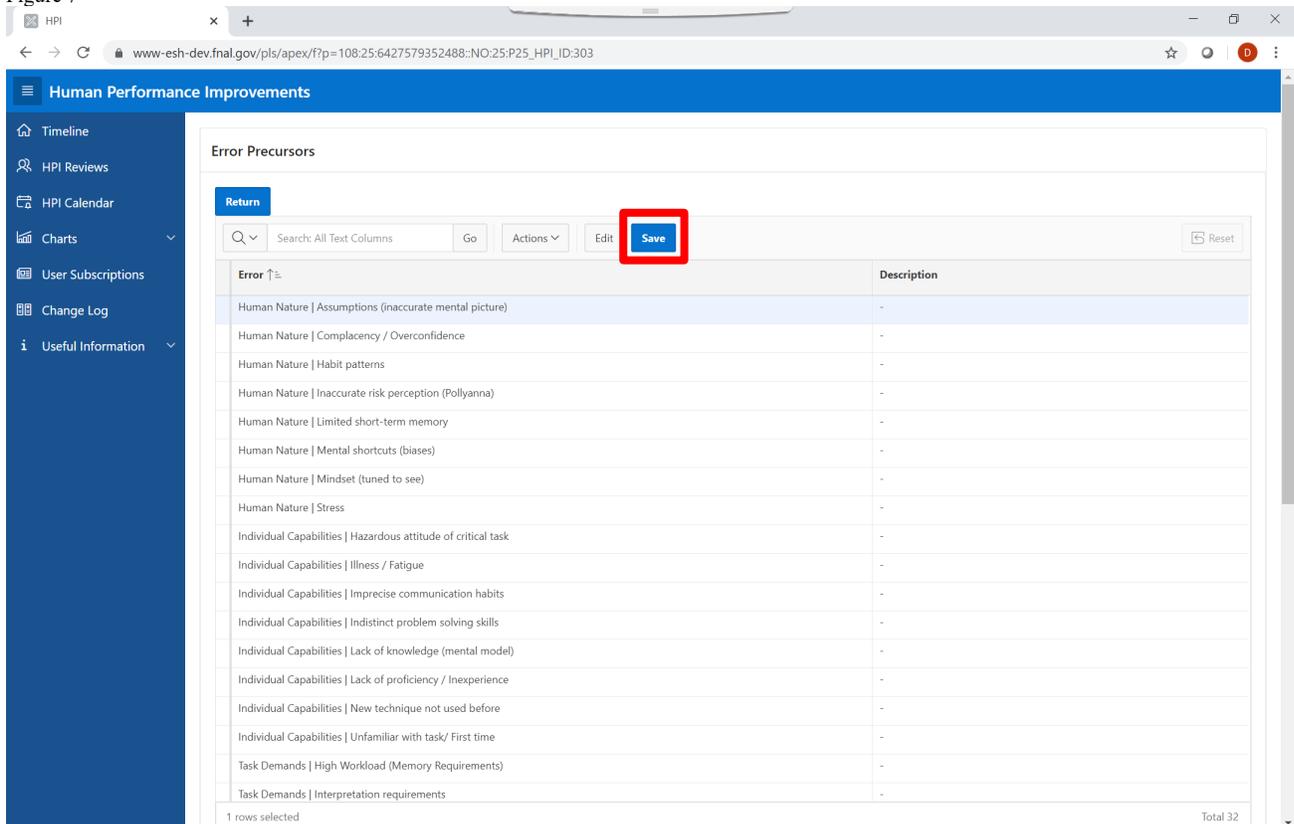
Click on the blue “[Create/Edit Error Precursors](#)” button and the page in Figure 7 below appears.

Double click or select and then click the gray “Edit” button, on the **Description** field adjacent to the Error Precursor you wish to enter/update that is applicable to your investigation.

A text box appears. Enter in the supporting information for that selection.

When all data has been selected and entered in the tab, click on the blue “[Save](#)” button.

Figure 7

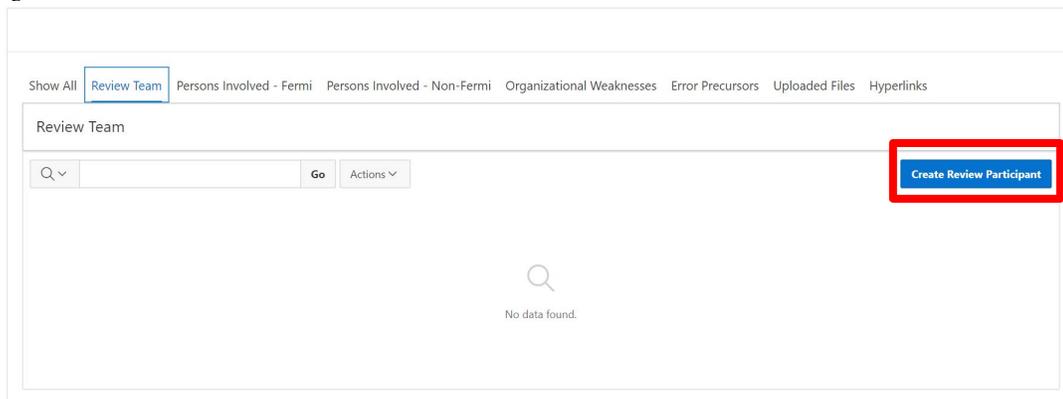


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Adding & Updating the Review Team

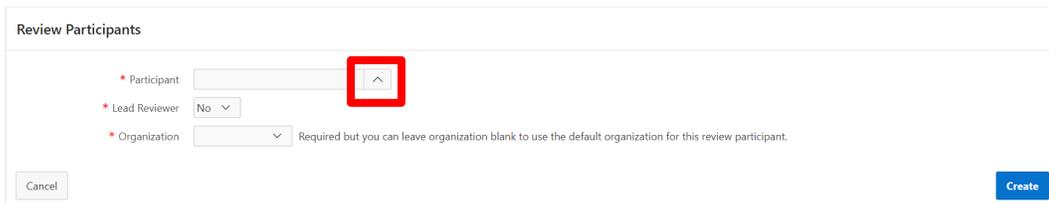
1. To add a new review team OR to update existing persons on the review team, on the **HPI** screen, scroll down to the Review Team tab. Click on the blue “[Create Review Participant](#)” button. (See Figure 8)

Figure 8



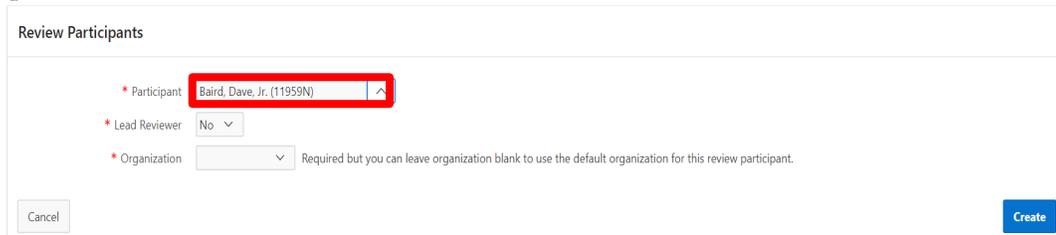
2. A new pop-up box will display as shown below. Click on the carrot (^) on the Participant line. (See Figure 9)

Figure 9



- a. A search pop-up box will appear. Search for the person’s name by their first name, last name, or Fermilab ID. Select the appropriate person and the “Participant” field will populate with their name as seen below. (See Figure 10)

Figure 10



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- b. Select whether the person is the “Lead Reviewer” from the drop-down list.
- c. Add an “Organization” from the drop-down list or leave the field blank to use the default organization for the review participant. Click the blue “Create” button. You will see the green “Action Processed.” Box at the top of the page.
- d. To add another reviewer, go back to step one and click on the blue “Create Review Participant” button and repeat the process.

The HPI Info screen will populate with the reviewer list as seen below.

Figure 11



Review Team

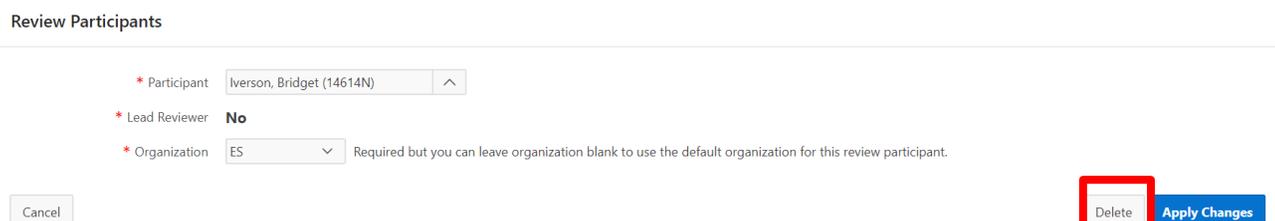
Search:

	Worker	Organizations	Lead Reviewer
	Baird, Dave, Jr. (11959N)	COO/CPO/QU	Yes
	Iverson, Bridget (14614N)	ES	No

1 - 2

3. Update the review team list. To update the review team list (remove team members or edit team member information), click on the pencil (indicated above) from the Review Team tab on the **HPI** page. (See Figure 11)
4. To delete a team member, click on the “Delete” button seen below in Figure 12. Click “OK” to the confirmation message that appears – “Would you like to perform this delete action?” The person will be removed from the list and you will be returned to the HPI Info page with an updated list. In addition, you will see the green “Action Processed.” Box at the top of the page.

Figure 12



Review Participants

* Participant

* Lead Reviewer **No**

* Organization Required but you can leave organization blank to use the default organization for this review participant.

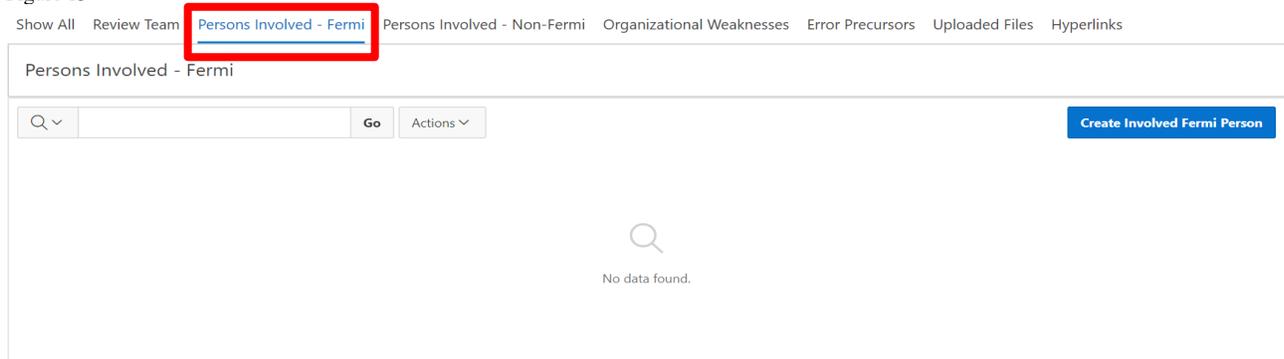
To update another review team member, go back to step 1 of this section and follow the instructions.

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Adding & Updating the Persons Involved

- To add Fermi personnel (e.g., FT, PT, On-call, Users, etc.) involved OR to update existing Fermi personnel involved, click on the “Persons Involved-Fermi” tab as seen in Figure 13

Figure 13



- For Fermilab personnel, click on the blue “[Create Involved Fermi Person](#)” button.
 - A box as shown in Figure 14 below appears. Click on the carrot (^) in the Involved Person field to select a person.

Figure 14



- A search pop-up box will appear. Search for the person’s name by their first name, last name, or Fermilab ID. Select the appropriate person and the “Involved Person” field will populate with their name as seen below in Figure 15. Click the blue “[Create](#)” button. You will see the green “Action Processed.” Box at the top of the page.

Figure 15



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- iii. To add more persons involved, continue by clicking on “[Create Involved Fermi Person](#)” button and follow steps i and ii.

The HPI Info screen will populate with the persons involved list as seen below in Figure 16.

Figure 16



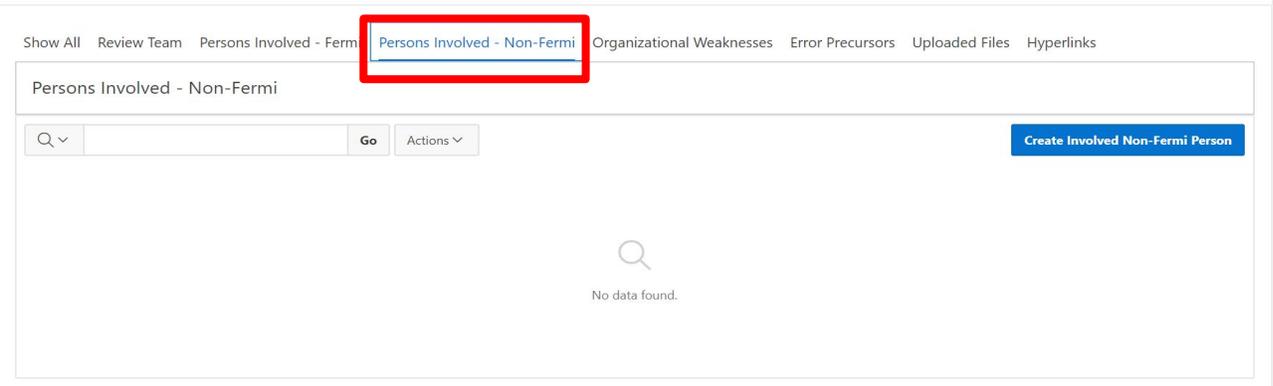
Persons Involved - Fermi

	Worker	Organization
	Baird, Dave, Jr. (11959N)	COO/CPO/QU
	Sarlina, T.J. (04129N)	COO/CPO/QU

1 - 2

2. For a subcontractor or non-Fermilab personnel, click on “Persons Involved – Non-Fermi” as shown in Figure 17.

Figure 17

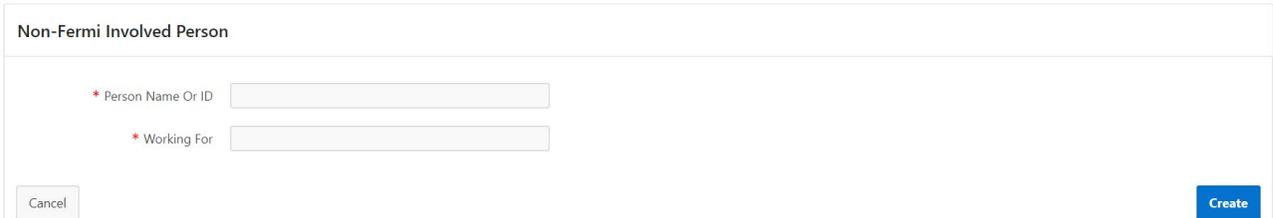


Persons Involved - Non-Fermi

No data found.

- a. For non-Fermilab personnel, click on “[Create Involved Non-Fermi Person](#)” button and the follow page as shown in Figure 18 will appear.

Figure 18



Non-Fermi Involved Person

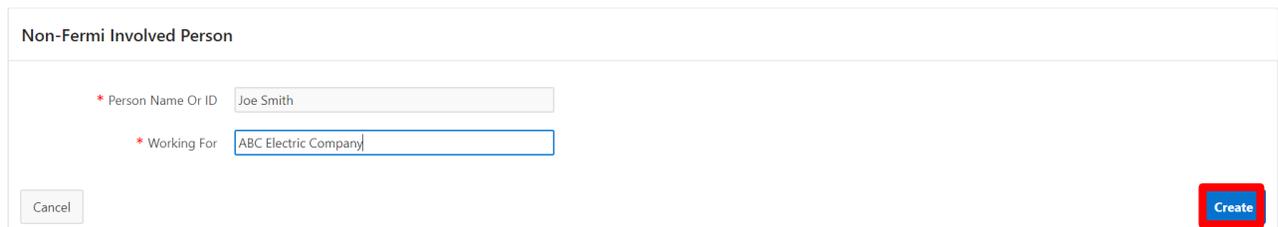
* Person Name Or ID

* Working For

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- i. Enter in the Person Name or ID in the first field “Person Name Or ID”, and then enter in what company or lab they work for in the second field “Working For” as shown if Figure 19.

Figure 19



- ii. Click the blue “Create” button. You will see the green “Action Processed.” Box at the top of the page.
- iii. Continue adding names by clicking on “Create Involved Non-Fermi Person” button and follow steps i through ii.

The HPI Info screen will populate with the persons involved list as seen below in Figure 20.

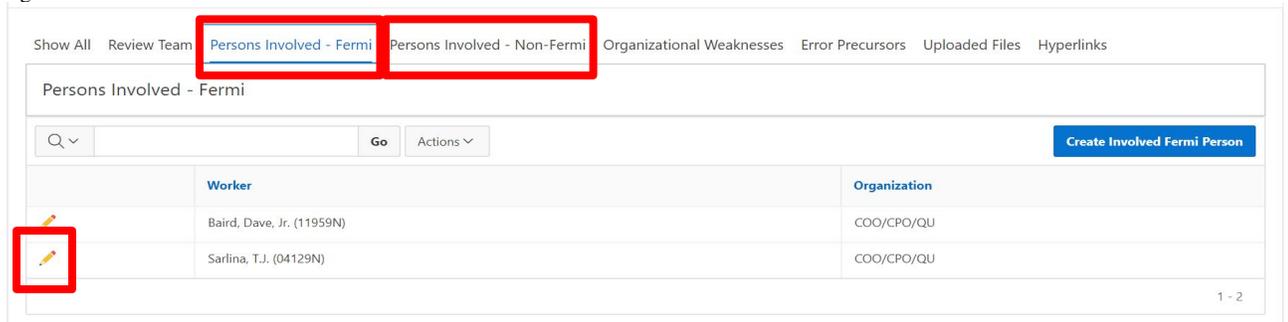
Figure 20



	Person Name Or ID	Working For
	Joe Smith	ABC Electric Company
	Jane Doe	XYZ Mechanical Company

3. To delete a person involved, click on either “Persons Involved – Fermi” or “Persons Involved – Non-Fermi” as shown in Figure 21.

Figure 21



	Worker	Organization
	Baird, Dave, Jr. (11959N)	COO/CPO/QU
	Sarlina, T.J. (04129N)	COO/CPO/QU

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- a. To update the Persons Involved for either Fermi or Non-Fermi (remove or edit information), click on the pencil indicated above in Figure 21 for either of the Persons Involved tabs on the HPI page.
- b. To delete a Person Involved, click on the “Delete” buttons, see below in Figures 22a and 22b. Click “OK” to the confirmation message that appears – “Would you like to perform this delete action?”

The person will be removed from the list and you will be returned to the HPI Info page with an updated list. In addition, you will see the green “Action Processed.” Box at the top of the page.

Figure 22a

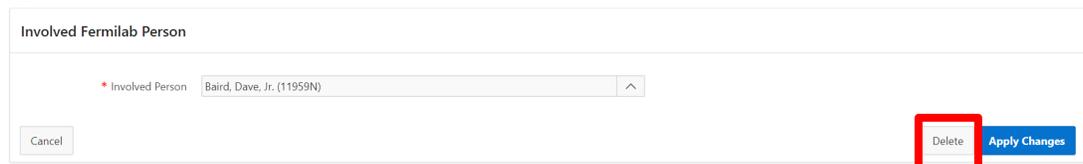
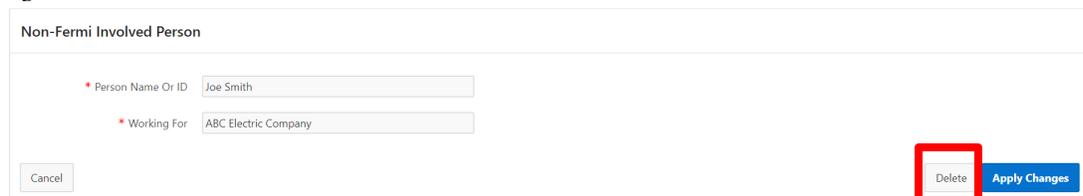


Figure 22b



The person will be removed from the list, and you will be returned to the HPI Info page with an updated list.

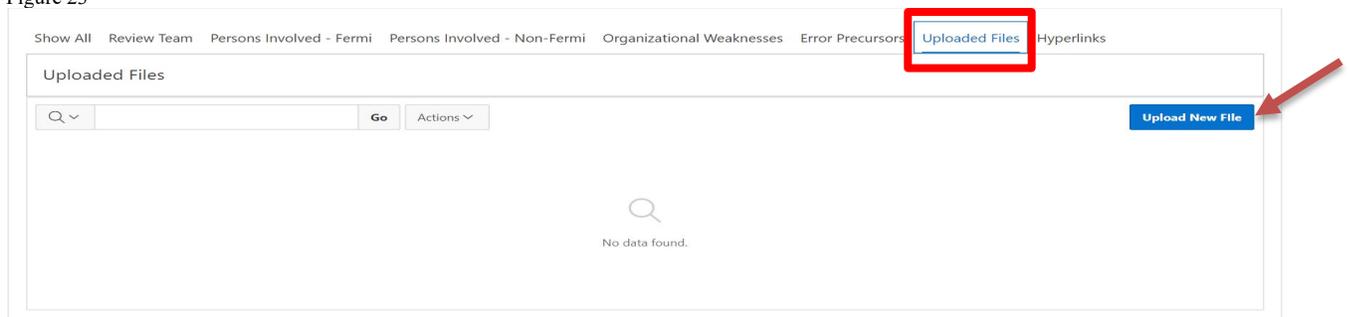
To update the persons involved, go back to step 1 of this section and follow the instructions.

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Uploading & Editing Files

1. Upload any applicable files to the investigation.
 - a. Click on the “Uploaded Files” tab as shown in Figure 23.
 - b. Then click on the blue “[Upload New File](#)” button as shown in Figure 23.

Figure 23



Once on the Upload Files screen as seen below in Figure 24, click on the file icon next to the “Choose file” field. Select a file (pictures, documents, etc.) from your computer and click on the blue “[Create](#)” button.

Figure 24

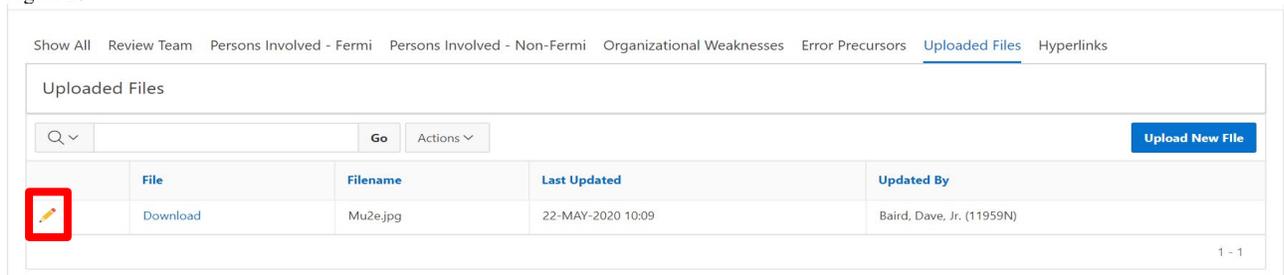


The document will now be loaded into the Uploaded Files tab and you will see the green “Action Processed.” Box at the top of the page.

2. Edit uploaded files.

To edit an uploaded file, click on the pencil indicated below in Figure 25.

Figure 25



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The screen below in Figure 26 will appear. You can delete the file by clicking “Delete”, or you can choose to upload a new file by clicking on the file icon next to the “Choose File” field and click on the blue “Apply Changes” button when finished.

Figure 26



Upload File

* File Choose file 

Download: Mu2e.jpg

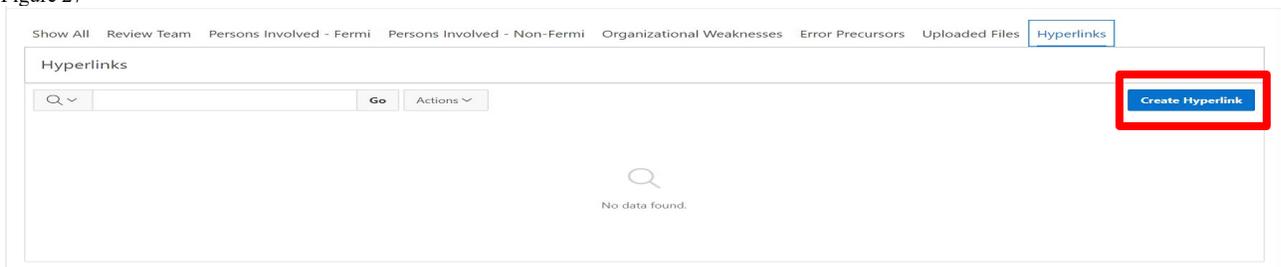
Cancel Delete Apply Changes

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Adding & Editing Hyperlinks

1. To add a hyperlink, from the HPI Info page, scroll to the bottom of the page and click on “Hyperlinks” tab and then click on the blue “[Create Hyperlink](#)” button as shown below in Figure 27.

Figure 27



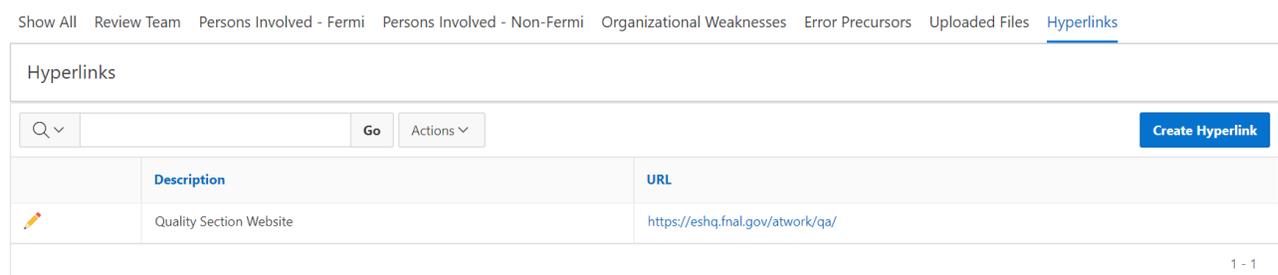
2. Add the “URL” with http:// or https:// included plus a URL “Description.” Once this information is added click on the blue “[Create](#)” button as shown in Figure 28. The hyperlink will now be loaded into the Hyperlinks tab and you will see the green “Action Processed.” Box at the top of the page.

Figure 28



3. To add additional hyperlinks, click on the blue “[Create Hyperlink](#)” again and repeat the process. All your entered hyperlinks will show up in the Hyperlinks section as indicated below.
4. To edit any existing hyperlinks, click on the pencil indicated below in Figure 29. Always remember to click the blue “[Apply Changes](#)” button when finished.

Figure 29



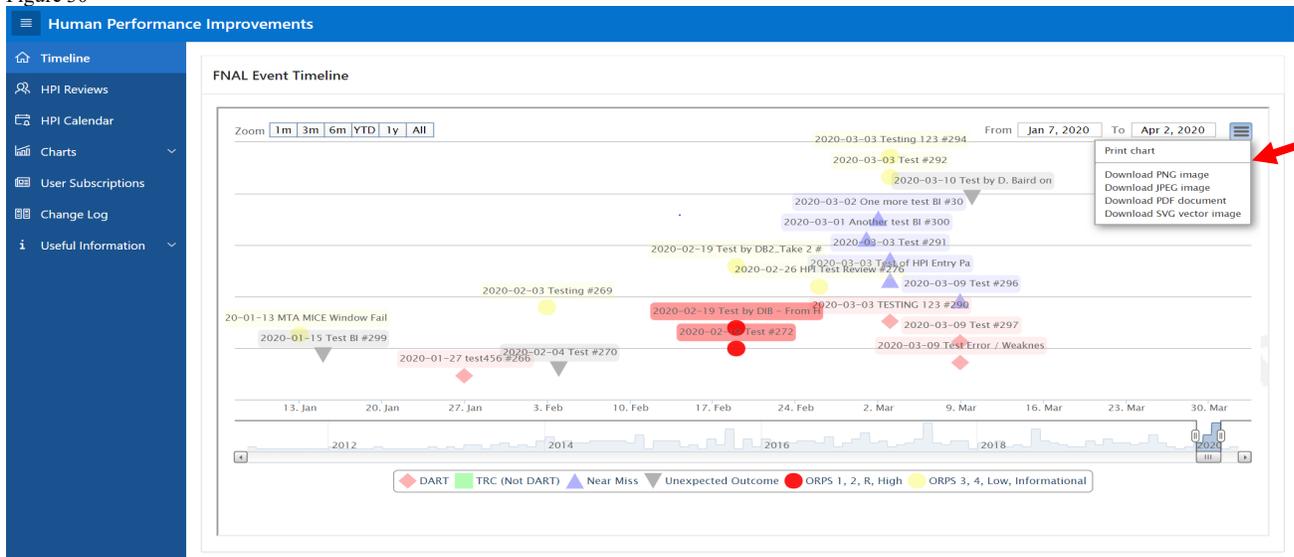
	Description	URL
	Quality Section Website	https://eshq.fnal.gov/atwork/qa/

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How to Search

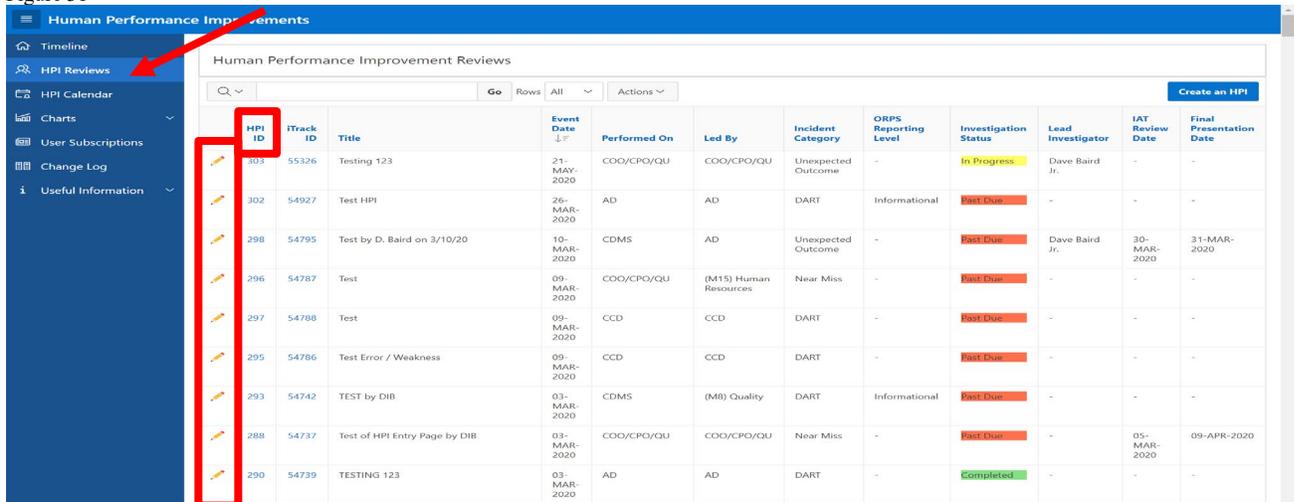
1. There is a Timeline view available by clicking on the “Timeline” button on the left navigation bar. You may also print the Timeline in a number of different formats. (See Figure 30). Note: Each HPI Review is linked to the HPI Report.

Figure 30



2. To search the HPI database, click on “HPI Reviews” from the left navigation bar as seen on Figure 31 below. To edit the HPI review click on the corresponding pencil to the left of the HPI ID. To view the HPI in Printer Friendly mode, click on the HPI ID.

Figure 31



HPI ID	Track ID	Title	Event Date	Performed On	Led By	Incident Category	ORPS Reporting Level	Investigation Status	Lead Investigator	IAT Review Date	Final Presentation Date
303	55326	Testing 123	21-MAY-2020	COO/CPO/QU	COO/CPO/QU	Unexpected Outcome	-	In Progress	Dave Baird Jr.	-	-
302	54927	Test HPI	26-MAR-2020	AD	AD	DART	Informational	Best Due	-	-	-
298	54795	Test by D. Baird on 3/10/20	10-MAR-2020	CDMS	AD	Unexpected Outcome	-	Best Due	Dave Baird Jr.	30-MAR-2020	31-MAR-2020
296	54787	Test	09-MAR-2020	COO/CPO/QU	(M15) Human Resources	Near Miss	-	Best Due	-	-	-
297	54788	Test	09-MAR-2020	CCD	CCD	DART	-	Best Due	-	-	-
295	54786	Test Error / Weakness	09-MAR-2020	CCD	CCD	DART	-	Best Due	-	-	-
293	54742	TEST by DIB	03-MAR-2020	CDMS	(M8) Quality	DART	Informational	Best Due	-	-	-
288	54737	Test of HPI Entry Page by DIB	03-MAR-2020	COO/CPO/QU	COO/CPO/QU	Near Miss	-	Best Due	-	05-MAR-2020	09-APR-2020
290	54739	TESTING 123	03-MAR-2020	AD	AD	DART	-	Completed	-	-	-

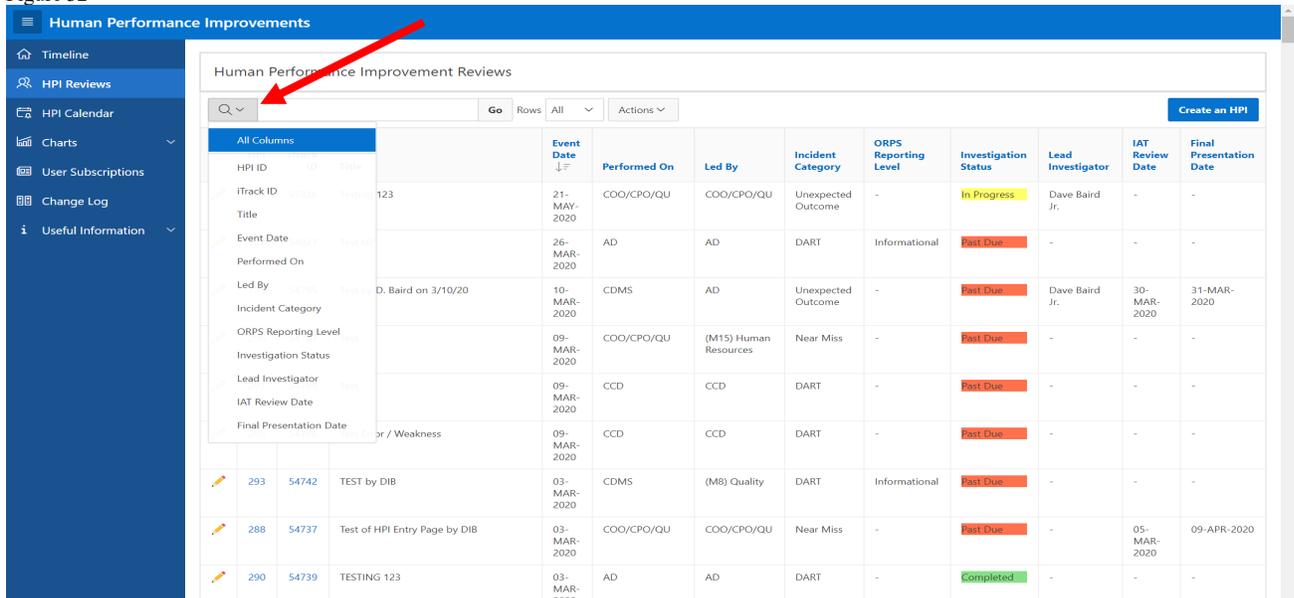
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Written by: Dave Baird	Reviewed and Updated By: Jemila Adetunji	Date: 26 May 2020	

Keyword Search

3. To search by key word, enter a word or phrase in the search field and click “Go”.

If you wish to narrow down your key word search to a specific field, click on the eyeglass icon and chose the field to search. Then enter in your key word and click “Go”. (See Figure 32)

Figure 32



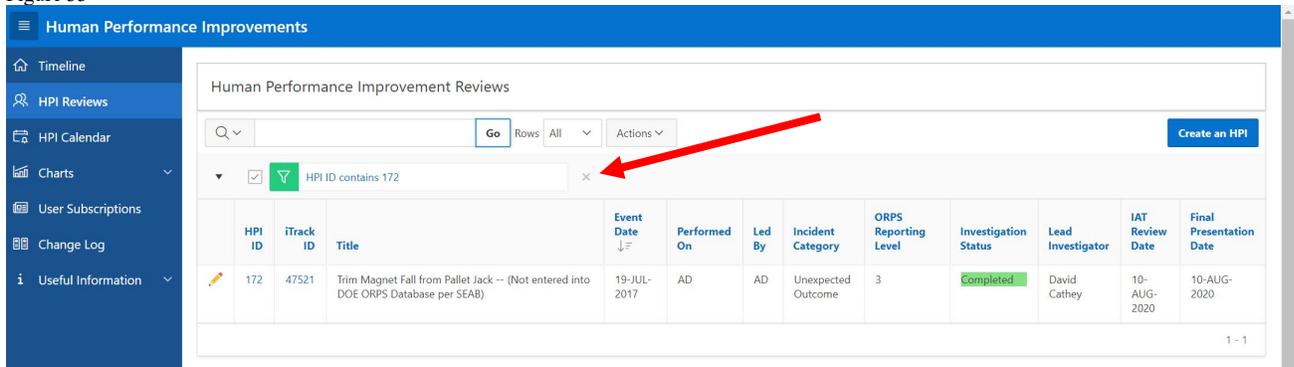
The screenshot shows the 'Human Performance Improvement Reviews' interface. A search filter dropdown menu is open, showing a list of fields to search in, including HPI ID, iTrack ID, Title, Event Date, Performed On, Led By, Incident Category, ORPS Reporting Level, Investigation Status, Lead Investigator, IAT Review Date, and Final Presentation Date. A red arrow points to the search input field within this dropdown menu.

HPI ID	iTrack ID	Title	Event Date	Performed On	Led By	Incident Category	ORPS Reporting Level	Investigation Status	Lead Investigator	IAT Review Date	Final Presentation Date
293	54742	TEST by DIB	03-MAR-2020	CDMS	(M8) Quality	DART	Informational	Past Due	-	-	-
288	54737	Test of HPI Entry Page by DIB	03-MAR-2020	COO/CPO/QU	COO/CPO/QU	Near Miss	-	Past Due	-	05-MAR-2020	09-APR-2020
290	54739	TESTING 123	03-MAR-2020	AD	AD	DART	-	Completed	-	-	-

Your results will be filtered on the screen as shown below. In this example, the database was searched using a key word on the HPI ID field. The search was looking for HPI number 172. (See Figure 33).

The filter you have used shows up in the filter list. You can remove this filter by clicking the ‘X’ next to the filtered item.

Figure 33



The screenshot shows the same interface as Figure 32, but with a search filter applied. The filter list at the top shows 'HPI ID contains 172' with a green checkmark and an 'X' icon to remove it. A red arrow points to this 'X' icon.

HPI ID	iTrack ID	Title	Event Date	Performed On	Led By	Incident Category	ORPS Reporting Level	Investigation Status	Lead Investigator	IAT Review Date	Final Presentation Date
172	47521	Trim Magnet Fall from Pallet Jack -- (Not entered into DOE ORPS Database per SEAB)	19-JUL-2017	AD	AD	Unexpected Outcome	3	Completed	David Cathey	10-AUG-2020	10-AUG-2020

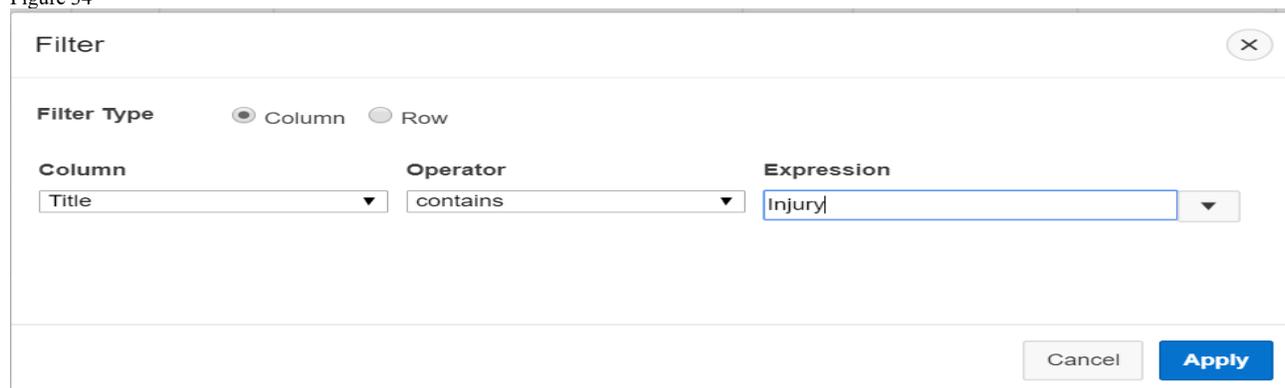
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To edit your search, simply remove the filter by clicking the “X” next to the filtered item or click directly on the filter to open the edit screen.

The edit filter screen below allows you to edit your filter. The filter feature is like the filter feature in Microsoft Excel. Make your changes and click the “Apply” button.

In the example below, Figure 34, the database was filtered on the Title column, and the keyword used to search was “Injury”.

Figure 34



Filter

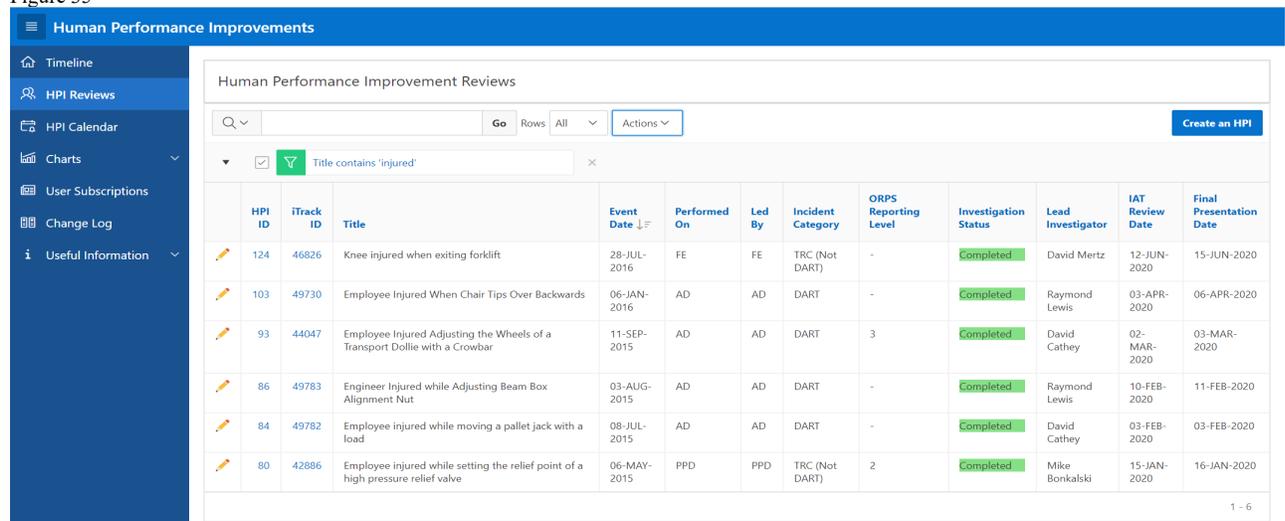
Filter Type: Column Row

Column: Title Operator: contains Expression: Injury

Buttons: Cancel, Apply

In the example below, the database was filtered on the Title column, and the keyword used to search was “Injury”. The filter was edited to search for “Injured”. The following results show after applying the change. Records containing the word “Injured” in the title show in the results list are below in Figure 35.

Figure 35

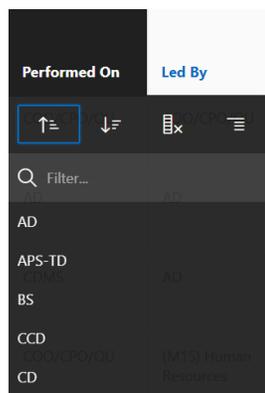


	HPI ID	iTrack ID	Title	Event Date	Performed On	Led By	Incident Category	ORPS Reporting Level	Investigation Status	Lead Investigator	IAT Review Date	Final Presentation Date
	124	46826	Knee injured when exiting forklift	28-JUL-2016	FE	FE	TRC (Not DART)	-	Completed	David Mertz	12-JUN-2020	15-JUN-2020
	103	49730	Employee Injured When Chair Tips Over Backwards	06-JAN-2016	AD	AD	DART	-	Completed	Raymond Lewis	03-APR-2020	06-APR-2020
	93	44047	Employee Injured Adjusting the Wheels of a Transport Dollie with a Crowbar	11-SEP-2015	AD	AD	DART	3	Completed	David Cathey	02-MAR-2020	03-MAR-2020
	86	49783	Engineer Injured while Adjusting Beam Box Alignment Nut	03-AUG-2015	AD	AD	DART	-	Completed	Raymond Lewis	10-FEB-2020	11-FEB-2020
	84	49782	Employee injured while moving a pallet jack with a load	08-JUL-2015	AD	AD	DART	-	Completed	David Cathey	03-FEB-2020	03-FEB-2020
	80	42886	Employee injured while setting the relief point of a high pressure relief valve	06-MAY-2015	PPD	PPD	TRC (Not DART)	2	Completed	Mike Bonkalski	15-JAN-2020	16-JAN-2020

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Search Using Column Headers

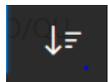
- To search using a column header, click on the column you wish to search by. In the example below, we will use the “Performed On” column.



When clicking on the column header, the header expands and allows you to:



sort the column Ascending



sort the column Descending



hide the column



add the column to the sort by list (Control Break)



search the column for a specific value



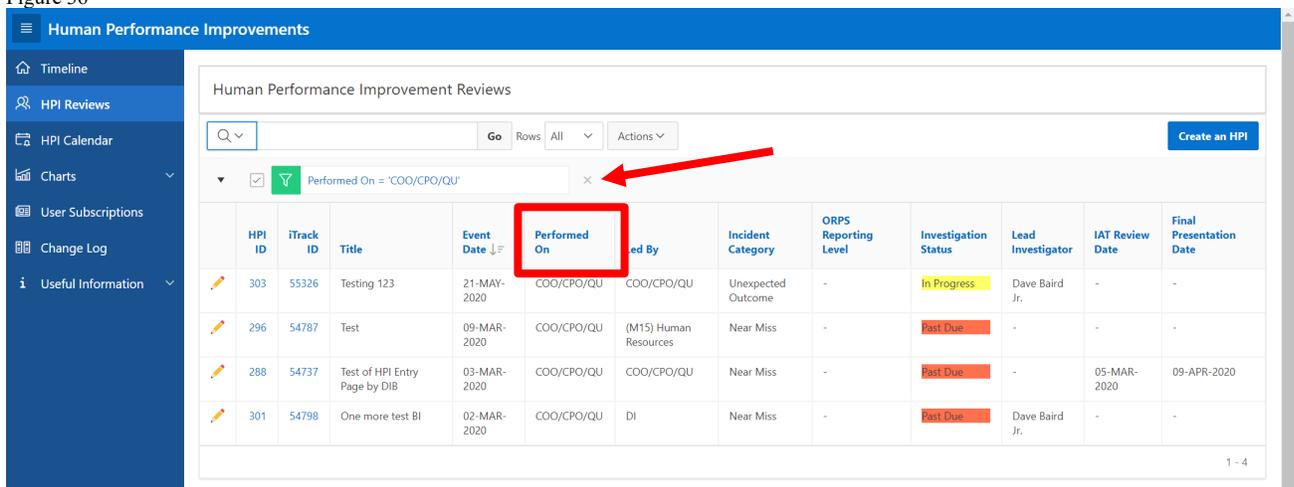
select a specific value from the list

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In this example, we want to show HPIs for a specific organization. COO/CPO/QU was selected from the list and the results show only those HPIs performed on that organization. (See Figure 36)

The filter shows up in the sort/filter list on the screen. To remove that filter just click the “X” next to the filter.

Figure 36



Human Performance Improvement Reviews

Search: [] Go Rows: All Actions: [] Create an HPI

▼ [x] Performed On = 'COO/CPO/QU' [x]

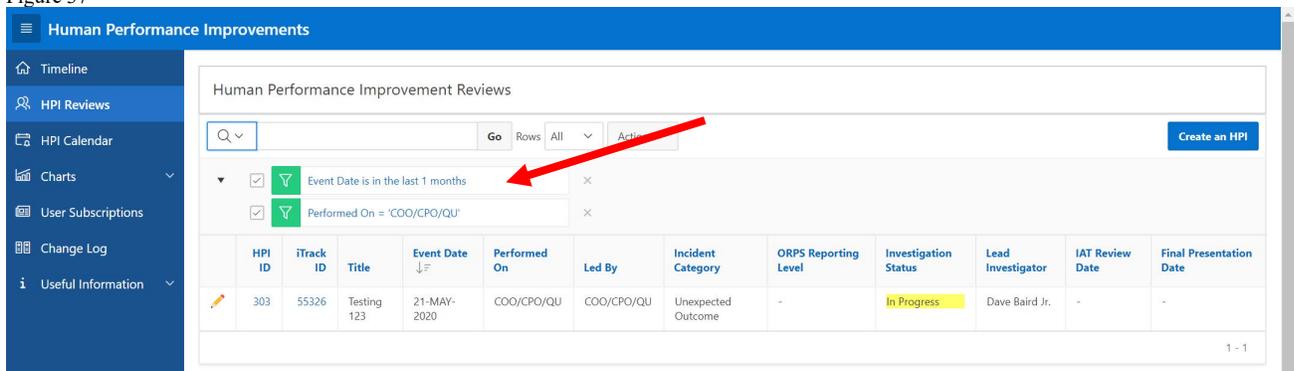
HPI ID	iTrack ID	Title	Event Date	Performed On	Led By	Incident Category	ORPS Reporting Level	Investigation Status	Lead Investigator	IAT Review Date	Final Presentation Date
303	55326	Testing 123	21-MAY-2020	COO/CPO/QU	COO/CPO/QU	Unexpected Outcome	-	In Progress	Dave Baird Jr.	-	-
296	54787	Test	09-MAR-2020	COO/CPO/QU	(M15) Human Resources	Near Miss	-	Past Due	-	-	-
288	54737	Test of HPI Entry Page by DIB	03-MAR-2020	COO/CPO/QU	COO/CPO/QU	Near Miss	-	Past Due	-	05-MAR-2020	09-APR-2020
301	54798	One more test BI	02-MAR-2020	COO/CPO/QU	DI	Near Miss	-	Past Due	Dave Baird Jr.	-	-

1 - 4

You can filter on as many columns as you wish at a time. The list above can be filtered to only include those HPIs performed on these organizations in the last month. The results are below in Figure 37.

Notice the Entered Date filter is now added to the sort/filter list above the results.

Figure 37



Human Performance Improvement Reviews

Search: [] Go Rows: All Actions: [] Create an HPI

▼ [x] Event Date is in the last 1 months [x]

▼ [x] Performed On = 'COO/CPO/QU' [x]

HPI ID	iTrack ID	Title	Event Date	Performed On	Led By	Incident Category	ORPS Reporting Level	Investigation Status	Lead Investigator	IAT Review Date	Final Presentation Date
303	55326	Testing 123	21-MAY-2020	COO/CPO/QU	COO/CPO/QU	Unexpected Outcome	-	In Progress	Dave Baird Jr.	-	-

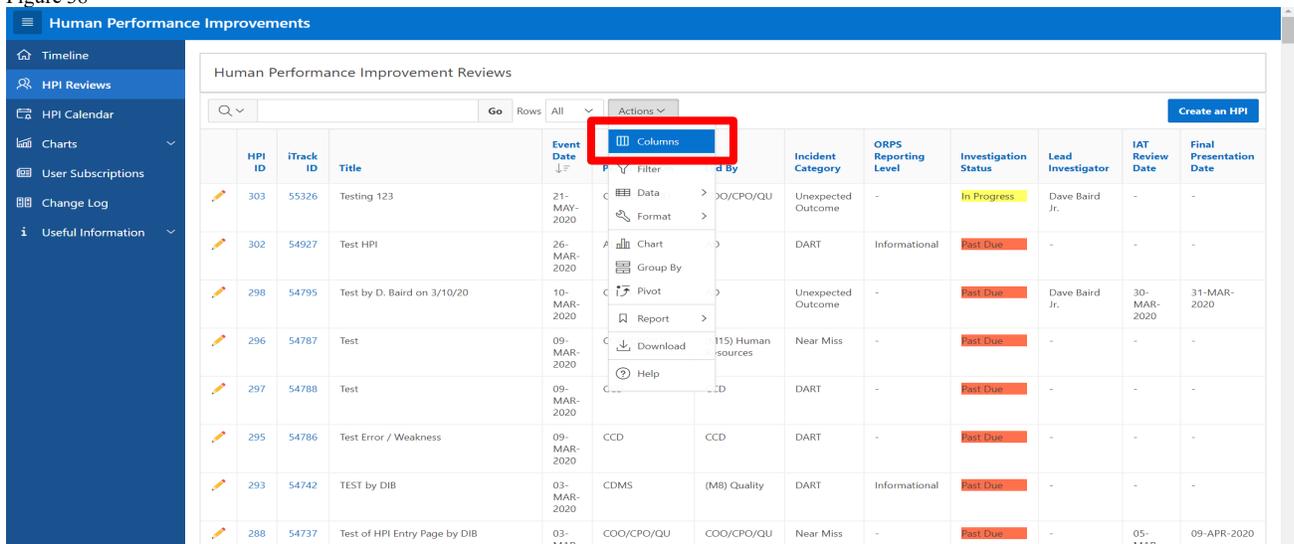
1 - 1

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Custom Views - Selecting Field Headers

1. You can change what field headers you see in the HPI Main List view. Click on the “Actions” box and then click on “Select Columns”. (See Figure 38)

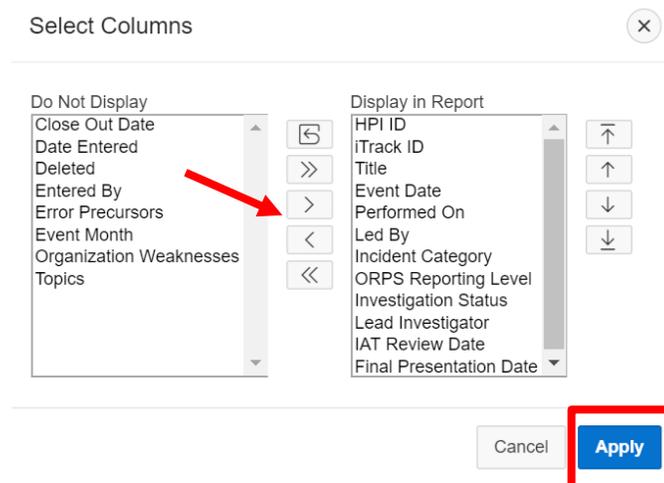
Figure 38



HPI ID	iTrack ID	Title	Event Date	Incident Category	ORPS Reporting Level	Investigation Status	Lead Investigator	IAT Review Date	Final Presentation Date
303	55326	Testing 123	21-MAY-2020	COO/CPO/QU	Unexpected Outcome	In Progress	Dave Baird Jr.	-	-
302	54927	Test HPI	26-MAR-2020	DART	Informational	Past Due	-	-	-
298	54795	Test by D. Baird on 3/10/20	10-MAR-2020	Unexpected Outcome	-	Past Due	Dave Baird Jr.	30-MAR-2020	31-MAR-2020
296	54787	Test	09-MAR-2020	115) Human resources	Near Miss	Past Due	-	-	-
297	54788	Test	09-MAR-2020	CD	DART	Past Due	-	-	-
295	54786	Test Error / Weakness	09-MAR-2020	CCD	CCD	Past Due	-	-	-
293	54742	TEST by DIB	03-MAR-2020	CDMS	(M8) Quality	Past Due	-	-	-
288	54737	Test of HPI Entry Page by DIB	03-MAR-	COO/CPO/QU	COO/CPO/QU	Near Miss	-	05-MAR-	09-APR-2020

The pop-up box below in Figure 39 will appear. Choose which columns to display in the report by selecting the name, and then moving it to either selection box – Do Not Display or Display in Report. To move the name from one selection box to the other, use the arrow buttons. When you are finished click the blue “Apply” button.

Figure 39



Select Columns ✕

Do Not Display

- Close Out Date
- Date Entered
- Deleted
- Entered By
- Error Precursors
- Event Month
- Organization Weaknesses
- Topics

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Display in Report

- HPI ID
- iTrack ID
- Title
- Event Date
- Performed On
- Led By
- Incident Category
- ORPS Reporting Level
- Investigation Status
- Lead Investigator
- IAT Review Date
- Final Presentation Date

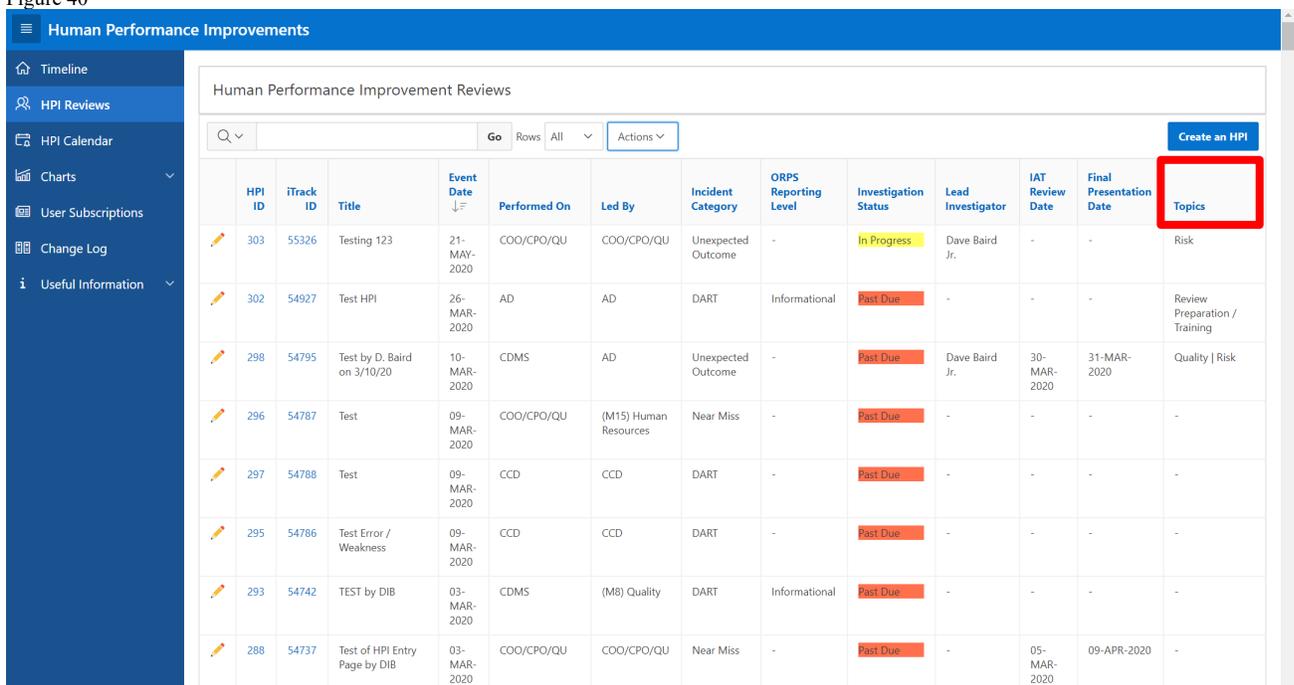
Cancel
Apply

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Your view will be changed based on what you have selected to show.

In the example below, the Topics field was added to the Display in Report selection box, and the information can now be viewed. (See Figure 40).

Figure 40



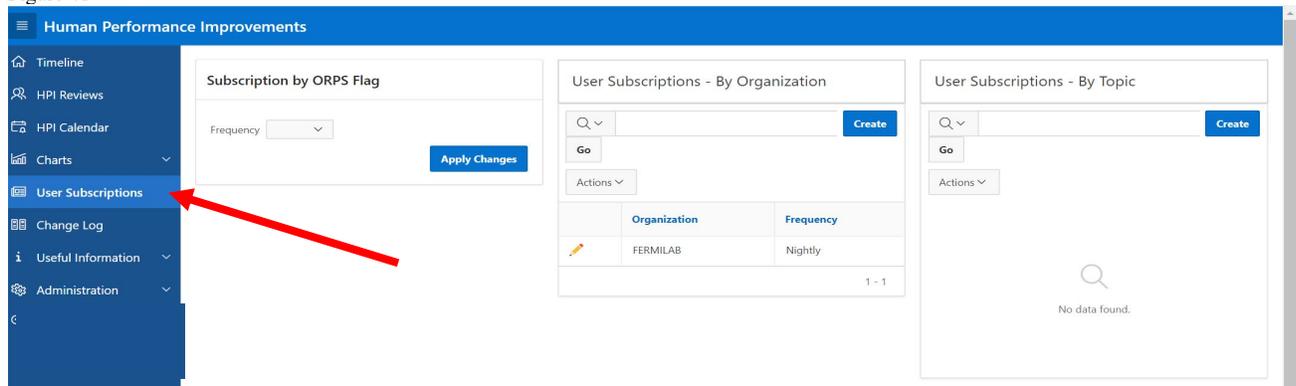
HPI ID	iTrack ID	Title	Event Date	Performed On	Led By	Incident Category	ORPS Reporting Level	Investigation Status	Lead Investigator	IAT Review Date	Final Presentation Date	Topics
303	55326	Testing 123	21-MAY-2020	COO/CPO/QU	COO/CPO/QU	Unexpected Outcome	-	In Progress	Dave Baird Jr.	-	-	Risk
302	54927	Test HPI	26-MAR-2020	AD	AD	DART	Informational	Past Due	-	-	-	Review Preparation / Training
298	54795	Test by D. Baird on 3/10/20	10-MAR-2020	CDMS	AD	Unexpected Outcome	-	Past Due	Dave Baird Jr.	30-MAR-2020	31-MAR-2020	Quality Risk
296	54787	Test	09-MAR-2020	COO/CPO/QU	(M15) Human Resources	Near Miss	-	Past Due	-	-	-	-
297	54788	Test	09-MAR-2020	CCD	CCD	DART	-	Past Due	-	-	-	-
295	54786	Test Error / Weakness	09-MAR-2020	CCD	CCD	DART	-	Past Due	-	-	-	-
293	54742	TEST by DIB	03-MAR-2020	CDMS	(M8) Quality	DART	Informational	Past Due	-	-	-	-
288	54737	Test of HPI Entry Page by DIB	03-MAR-2020	COO/CPO/QU	COO/CPO/QU	Near Miss	-	Past Due	-	05-MAR-2020	09-APR-2020	-

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How to set up your HPI User Subscriptions

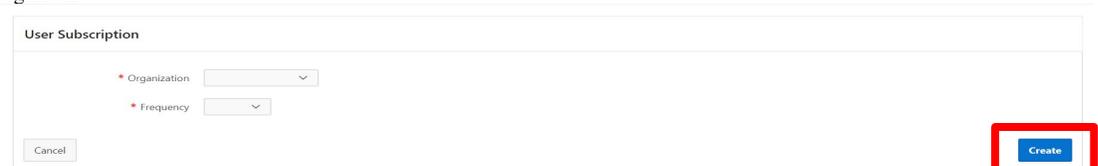
1. Click on the “User Subscriptions” tab on the left navigation bar. This will take you to the page seen below in Figure 41.

Figure 41



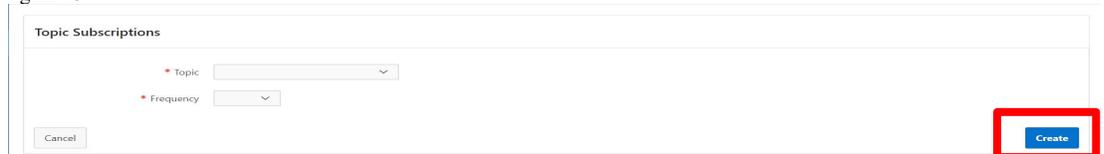
2. There are three options to choose from to set up your User Subscriptions. They are by:
 - a. **ORPS Flag** – Select from the dropdown list either “Nightly” or “Weekly” to receive notices if the HPI Review is also an ORPS or ORPS/NTS. Then click on the blue “Apply Changes” box.
 - b. **Organization** – Click on the blue “Create” button. Then from the next page, Figure 42, select an Organization from the dropdown list and then a Frequency. Note: You must make a selection for each organization of interest. If you want to receive all HPIs then choose “Fermilab” as the Organization. Finally, click the blue Create button.

Figure 42



- c. **Topic** – Click on the blue “Create” button. Then from the next page, Figure 43, select a Topic from the dropdown list and then a Frequency. Note: You must make a selection for each topic of interest. Finally, click the blue Create button.

Figure 43



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References

[Quality Assurance Manual \(QAM\) Chapter 12010 – Fermilab Lessons Learned Program and Procedures](#)

[QAM Chapter 12030 – iTrack Procedures and Risk Assessment](#)

[QAM Chapter 12040 – Corrective and Preventive Actions](#)

[QAM Chapter 12050 – Root Cause Analysis \(RCA\)](#)

[QAM Chapter 12110 – Human Performance Improvement \(HPI\)](#)