Complementary Client Services

To learn more, or to sign up for a no-obligation webinar, contact Oscar Fierro via email at Oscar@ShomerInsurance.com

SHOMER
INSURANCE SERVICES
-HEALTHCARE DIVISION-
AN **ALERA GROUP** COMPANY

Audit Track®

Field Survey Software that Streamlines the Audit Process for Safety and Compliance

Audit Track is a simple-to-use web application that helps organizations create and maintain audits, surveys, and questionnaires. It allows employers to automate and streamline the audit process.

Customize to Your Organization

- Create custom audits for your organization or department
- Deploy in the field on any major mobile device
- Assign to any employee and track tasks, activities, and results
- Summary and detailed reports based on your criteria
- Track, achieve, and demonstrate regulatory compliance

- Target and resolve revealed issues before they become incidents
- Proactively manage your workplace
- Set field audits and surveys to your unique reoccurrence
- Make automated auditing an integral part of your safety strategy
- Keep all Safety Audits, Inspections, Self-Assessments, and other workplace checklists up to date

Compliance Made Easy	Part of a Holistic Behavior-Based Safety Solution	Compatible with All Major Browsers and Tablets
This flexible tool allows managers to oversee all the safety audit, inspection, and compliance reporting needs of your organization. Ensure all tasks and items are assigned, completed, and recorded, so that your workplace is safe and compliant. Help protect your workplace from liability with this flexible, customizable tool. Take a look at our Audit Track® Template List.	Audit Track is part of the Succeed Risk Management Center®, a web-based integrated software suite that provides your organization with the tools you need to proactively manage workplace safety, employee training, IIPP/APP safety program development, and OSHA and regulatory compliance tracking, reporting, and analysis. A complete behavior-based safety solution.	Android tablets with the latest Chrome browser, Apple iPads and computers with the latest Safari or Firefox browser, Windows PCs with the Internet Explorer 10 or higher, or the latest Firefox or Chrome browsers.

Ensure Job Safety with BBS Track® and Safety Observation Track®

Create Job Hazard Analyses (JHAs), Conduct Safety Observations, and Build an Effective Behavior-Based Safety Program.

- Identify Existing and Potential Hazards with JHAs

- Build Your Own JHAs from Our Pre-Loaded Library of Sample JHAs

- Customize Steps, Issues and Job Requirements to the Position

- Export to PowerPoint for Easy, Custom Training

- Perform and Record Safety Observations

- Comply with Safety Regulations and OSHA Voluntary Protection Programs

- Create and Maintain a Proactive Safety Culture to Ensure Job Safety

- Reduce Incidents, Claims and Losses Through Implementing a BBS Program

Reduce Injuries	BBS Service	Holistic Solution
Committing to a behavior-based safety program is known to reduce injuries, loss time, and workers compensation costs, as well as improve employee morale. Use BBS Track to build your BBS Program.	We can assist you by reviewing job tasks and identifying critical behaviors to create JHAs. We then train your staff to perform Safety Observations and implement a Behavior-Based Safety Program.	BBS Track is part of the Succeed Risk Management Center, a comprehensive suite of insurance risk management, workplace safety, and compliance software tools.

Manage Your Certificates of Insurance to Prevent Unexpected Liabilities with COI Track®

COI Track streamlines certificate of insurance management to ensure you minimize risk by maintaining up-to-date vendor records. Avoid the liability from uninsured vendors, contractors, suppliers, or tenants.

- Ensure Coverage Limits Meet Your Requirements

- Track and Monitor Policy Expiration Dates

- Automatically Notify Non-Compliant Vendors

- Automatic Reporting to Provide You with Complete Documentation

- Generate Needed Analysis by Vendor, Project or Location

- Easily Load Data and Attach Files

- Address a Critical, but Often Overlooked, Risk Management and Loss Control Discipline

Use COI Track to:	Holistic Solution
- Prevent significant potential liabilities - Save time and improve accuracy - Streamline vendor relation - Document and demonstrate compliance required by your insurance carrier	COI Track has full reporting capabilities to provide you with the complete documentation required by your insurance carrier. COI Track is part of the Succeed Risk Management Center, a comprehensive suite of insurance risk management , workplace safety and compliance software tools

HR & Benefits Library™

A Comprehensive HR Resource Solution for Your Business

Award winning online HR & Benefits Library complete with attorney-developed content to help you stay compliant with federal and state labor laws and regulations including COBRA, HIPAA, FMLA, USERRA, ADA, and Health Care Reform

- Sample forms and policies

- Employment law resources

- HR productivity tools

- Training videos for dozens of common HR issues

- Health Care Reform updates & HR News alerts

The HR & Benefits Library – Your Compliance Edge

The HR & Benefits Library is powered by HR360, Inc., a leading online HR resource provider. It is easy to navigate, rich in online content, and great for both HR professionals and line managers within your organization.

- Federal HR and Benefits Compliance
- State HR and Benefits Information
- Fast Answers to HR and Benefits Questions
- Downloadable Forms, Policies and Checklists
- How to Hire and Terminate Employees to Prevent Costly Lawsuits
- Online HR Productivity Tools

- Salary Benchmarking
- Job Description Builder
- Performance Review Builder
- Multi-State Law Comparison Tool
- Health Care Reform Updates
- HR News Alerts

Your Single Source for…

- **Latest Health Care Reform tools and guidelines**

- **How to interview, hire and terminate employees**

- **How to do performance reviews at every level**

- **Interactive HR tools including:**

- **Salary Benchmarking**

- **Job Description Builder**

- **Performance Review Builder**

- **State Law Comparison Tool**

- **Hundreds of downloadable forms and policies**

- **Customizable employee handbook**

- **State and federal compliance information**

- **State labor laws guidance**

- **Employee benefits**

- **Heath Care Reform updates**

- **Recruitment & hiring best practice and training**

- **Discipline & termination best practice and training**

- **HR Apps & Tools**

- **Resource Center materials**

- **HR Training videos**

Immediate access to practical resources to professionally address your Human Resource needs.

It's like having an HR department at your fingertips.

SUCCEED INJURY & ILLNESS PREVENTION PROGRAM COMPLIANCE PACKAGE

- An IIPP is a safety and health best-practice program that can proactively prevent incidents, accidents, claims and losses, and significantly reduce your organization's Total Cost of Risk.

  - Federal OSHA strongly recommends and 15 states require an IIPP.

- All the tools you need to build and proactively manage an IIPP are available within your Risk Management Center®.

RISK MANAGEMENT LIBRARY®

Access sample best practice policies and procedures and customize them to fit your organization's unique operational needs

SUCCEED CUSTOM ONLINE TRAINING SERVICE

Cost-effectively transfer all of your organization-specific PowerPoint training programs into easy-to-use eLearning modules to help you manage your specific IIPP

TRAINING TRACK™

Automatically assign, monitor, evaluate, and report all employee training for a successful IIPP. Training Track™ also offers access to a multitude of training titles

JOB DESCRIPTION TRACK® & BBS TRACK®

Develop position-specific job descriptions and identify key safety behaviors and potential hazardous job elements that need to be mitigated and monitored with BBS Track®

INCIDENT TRACK®

Easily track all types of workplace incidents, accident investigations, and employee injuries with Incident Track®. Conduct root cause analysis, and record corrective actions. Trend incidents and focus prevention efforts. Report claims and run OSHA 300, 301 and 300A logs

Watch a client testimonial video, delivered by an Assistant Corporate Safety Director on the applications listed above. Learn how the Risk Management Center can assist your organization with IIPP development.

An IIPP can help you maintain compliance with federal and state OSHA requirements while significantly improving your safety culture, reducing your risk exposures, and building a strong, high-morale team.

The Succeed Injury & Illness Prevention Program Compliance Package delivers the resources you need to build and manage your IIPP.

Comprehensive Incident Management and OSHA Claims Reporting with Incident Track®

Improve the visibility, efficiency and accuracy of your workplace incident management system.

- Easily track all types of incidents, including near misses

- Enter an incident only once

- Document accident investigations

- Track employee injuries and time off work

- Report claims automatically

- Generate incident reports all OSHA logs, and first reports of injury

- HIPAA - compliant

- Identify where to focus you mitigation efforts with trending analytics

- Track all types of claims: work-related, environmental, general liability, property, fleet, and more

- Analyze loss sources to prevent incidents and near misses

- Reduce risk and losses

- Lower costs

Automate the Cycle	OSHA 300 Log Reporting	Holistic Solution
• Incident tracking • OSHA Logs • Claims Reporting • Comprehensive Trending & Reporting	Most businesses are required to complete the OSHA 300, 300A and 301 forms by OSHA. These different forms have different uses and requirements within a workplace.	Incident track is part of the Succeed Risk Management Center, a comprehensive suite of insurance risk management, work;ace safety and compliance software tools.

Building Job Descriptions and return-to-work programs is easy with Job Description Track®

Quickly build job descriptions to clearly communicate employee roles, responsibilities and performance expectations.

- Step-by-step job position development wizard

- Share job descriptions across the organization

- Prepare new hires for assignments focus employee behavior on safety

- Manage, motivate and engage employees

- A cost effective and compliant return-to-work program

- Build modified or transitional duty job descriptions

- Re-introduce injured workers to the workplace

- Reduce workers' compensation costs

HR Management	Job Description Services	Holistic Solution
Use the Job Description Track application as the foundation of an effective HR personnel management system and to develop and maintain a safety culture.	We can assist you by creating and manging a customized library of job descriptions, including modified or transitional job descriptions, so you can mange an effective and successful Return-to-Work Program.	Job Description Track is part of the risk performance manager, a comprehensive suite of insurance risk management, workplace safety, and compliance software tools.

Find the Resources You Need in the Risk Management Library®

Instant access to over 2,000 risk management and safety resources in both English and Spanish.

- Policies and Procedures
- Online & Stand Alone Training Programs
- Training Shorts
- Posters
- Quizzes
- Checklists

- Establish Guidelines and Procedures
- Create an Injury and Illness Prevention Program (IIPP)
- Inform and Engage Employees
- Improve Training Programs
- Demonstrate Compliance

Editable Format	My Content	Holistic Solution
All documents are printable, downloadable, and customizable. The format is either Microsoft Word or PowerPoint. Use the templates to enhance your health and safety program.	My Content is a filling and distribution program that allows you to customize and store the documents from the library. Assign documents to employees and utilize the tracking system to assure the documents have been reviewed by all recipients. You can also build a Safety and Risk Management Manual out of the documents in my content.	The library and My Content are part of the Succeed Risk Management Center, a comprehensive suite of insurance risk management, workplace safety, and compliance software tools.

An all new risk management platform

Introducing the redesigned risk management platform

- EHS Best-Practice Library
- Workplace Safety Management
- Employee Training & Development
- Risk Mitigation Tools
- Hazard Communication Control
- Compliance Reporting

Improved Design, Performance, and Experience

Your risk management platform has been upgraded to enhance and streamline your risk management and occupational health and safety strategy.

- Fresh new look
- Simpler and more intuitive workflows
- Robust and mobile-friendly software architecture

The new risk management platform still has all the features and functionality you use today. Its evolutionary design will ensure a seamless transition for experienced users, while new users can be productive quickly.

Compatible with all Major Browsers and Tablets

Android tablets with the latest Chrome browser, Apple iPads and computers with the latest Safari or Firefox browser, Windows PCs with the Internet Explorer 10 or higher, or the latest Firefox or Chrome browsers.

Improved Design	Improved Performance	Improved Experience

Fresh new look and feel

- Redesigned based on the best-practice principle of User-Centered Design, and your continual input and feedback
- Cleaner look fro all buttons, forms, and fields, delivering functionality that is more friendly and still familiar

Quick Links™, Alerts & Notifications

- Quick links provide immediate access to useful features, and a portal to other third party software applications
- Alerts & Notifications keep you on track, and on top of staff performance
- Customizable home page can become your dashboard for the work day

New Global Navigation

- Uniform visual layouts across the entire platform will streamline and enhance your experience
- Intuitive, step-by-step data entry wizards; great for beginners and experienced users
- Increase productivity and accomplish tasks simply, quickly, and correctly
- Easier employee management

New, Simpler Workflows with built in wizards

- Now you can access different applications instantly and always know where you are
- Switch between sites or apps with a click
- Enhance administrate features mean you can customize the platform for your organization's needs

Improved Resource Library, New Advanced Search

- All Library materials have document summary, file type, and document description
- A powerful new search capability delivers faster, more reliable and relevant material, for each application
- Find what you need quickly and easily

Take the Stress out of Managing Safety Data Sheets with SDS Track®

A complete system to organize, manage and provide access to your Safety Data Sheets (SDSs). This system ensures organization, compliance and control.

- SDSs are Required for all Chemicals and Hazardous Materials

- Help you comply with the OSHA Hazard Communication Standard

- Fulfill OSHA's Right to Know and Right to Understand Requirements - Employees Must have Access to Current SDSs on site

- Easily Load Your Existing SDSs

- Provide Employee Access to SDSs from any Computer with Internet Access

- Print HMIS and NFPA Labels for Secondary Containers

- Increase Workplace Safety

Automate Compliance	Holistic Solution
• Organize SDSs • Print Labels • Export SDS and Hazardous Chemical List	SDS Track is part of the Succeed Risk Management Center, a comprehensive suite of insurance risk management, workplace safety, and compliance software tools.

Succeed Hazard Communication Compliance Program

- It is critical to the long-term health of your organization and employees to provide an

- The tools available within the Risk Management Center® deliver everything you need to create, implement, manage, and monitor a GHS-compliant hazard communication program.

SDS TRACK®

This application is the tool you need to develop and deploy the new Safety Data Sheets to ensure you are in compliance with federal and state regulations. SDS Track allows you to print primary and secondary container labels to aid your compliance efforts

TRAINING TRACK™

Provides an automated eLearning platform to deliver both GHS employee training and any organization—or site-specific training you need to deploy. Educate employees on the new:
- Hazard Classification Criteria
- Container label requirements
- SDS (Safety Data Sheet) structure and format

SDS SERVICE

You can outsource compiling, organizing, and updating your SDSs with the Succeed Safety Data Sheet Service to ensure your SDSs are always current, accessible, and OSHA compliant

RISK MANAGEMENT LIBRARY®

This library contains a wide range of relevant example policies, procedures, training shorts, posters, and quizzes focused on the new Hazard Communication Standard

Watch a client testimonial video, delivered by an Assistant Corporate Safety Director on the applications listed above. Learn how the Risk Management Center can assist your organization with employee training compliance.

The Succeed Online Training Compliance Program delivers the training resources you need to cost-effectively stay compliant and improve the skills and knowledge of your workforce.

Succeed online training compliance program

- Ensure your organization delivers the workplace health and safety training resources your employees need.

- Each element of the Succeed Training Compliance Program helps your organization stay compliant.

SUCCEED TRAINING COLLECTION

This training library contains a comprehensive and continually growing selection of essential employee safety and compliance topics. Each training course is based on a foundation of practical field experience, and is built with the latest technology to ensure sound instructional design and ease of use
- Efficient, cost-effective training solution
- Engaging, effective employee development
- Instant, recurring Return on Investment

Unlimited annual access to a rich library of web-based online training courses with no per-session fees will significantly reduce your annual training costs

TRAINING TRACK™

Efficiently manage the assignment, delivery, tracking, and compliance reporting of all needed eLearning training courses through automated integration with this learning management system

CUSTOM ONLINE TRAINING SERVICE

Cost-effectively transfer all of your organization-specific PowerPoint training programs into easy-to-use eLearning modules that can be assigned, distributed, and tracked at no additional cost

RISK MANAGEMENT LIBRARY®

Integrate relevant best practice policies, procedures, training shorts, quizzes, and posters with your compliance training program via the Risk Management Library®

Watch a client testimonial video, delivered by an Assistant Corporate Safety Director on the applications listed above. Learn how the Risk Management Center can assist your organization with employee training compliance.

The Succeed Online Training Compliance Program delivers the training resources you need to cost-effectively stay compliant and improve the skills and knowledge of your workforce.

Automate your Employee Training Program with Training Track®

Training Track delivers the scope and flexibility you need for a complete and automated online training program.

- Meet all Training needs with one Solution
- Automatic Reminders of Upcoming or Overdue Trainings
- Automatically Documents Completed Trainings
- Option to Print Certificate of Completion
- Eliminates Need for On-site trainer

- Implement New Hire Orientation Programs or Important HR Policy Training
- Train Employees in New Safety Procedures and OSHA Certification
- Create and Deploy Customized Training Content
- Demonstrate Compliance & Reduce Incidents

Training Library	Custom Training	Holistic Solution
We currently offer many different training courses including wellness, hazard communication, sexual harassment prevention (California-compliant), and more!	Let us help you build a library of custom online training programs, specific to your organization. Save valuable time and enable significant efficiencies! Assign the training to employees, who can go through the training at their own pace, in any location with internet access. Certificates of completion are automatically recorded into training track.	Training Track is part of the Succeed Risk Management Center, a comprehensive suite of insurance risk management, workplace safety, and compliance software tools.