

Safety Administrator Guide

Moneta.®

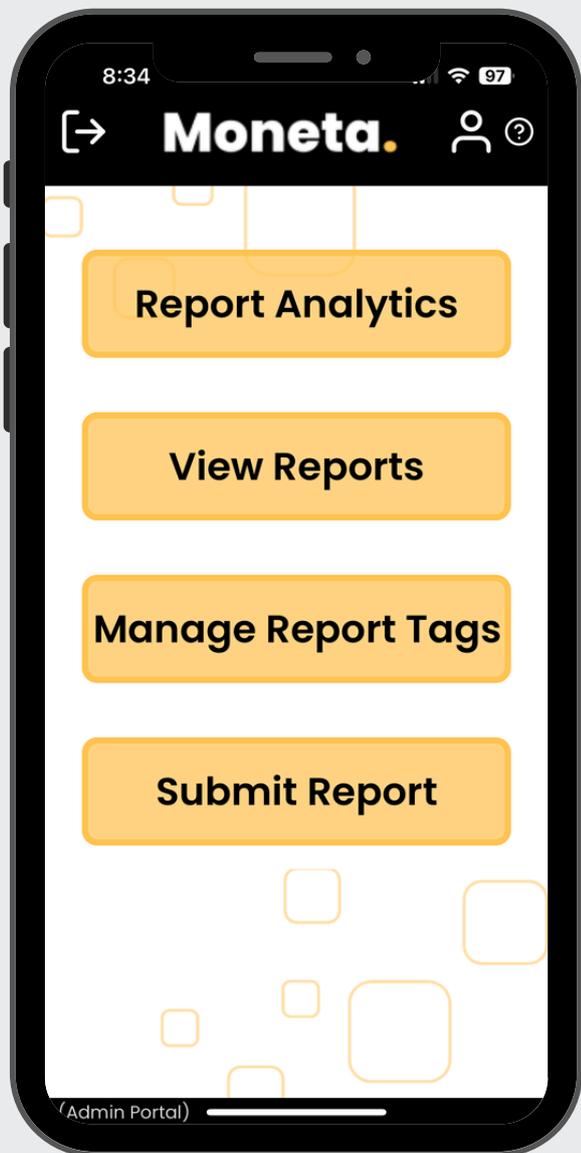


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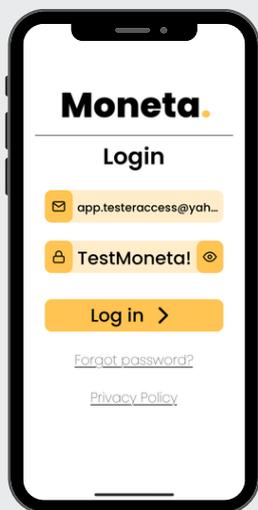
1. Getting Started

1.1. Accessing Moneta

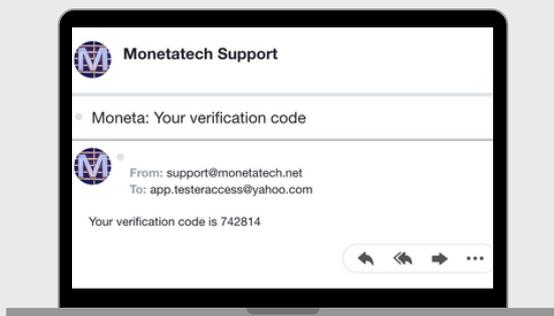


You can access the Moneta reporting portal on your mobile phone or tablet by downloading the iOS or Android app, or through the web at www.monetareport.net. Simply click the appropriate link on the left to get started.

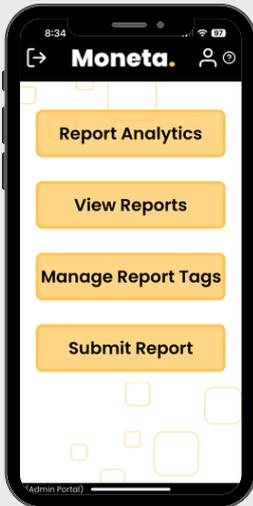
1.2. Logging In for the First Time



When you log in to Moneta for the first time, use your email address as your username and enter the temporary password sent to you from support@monetatech.net. If you don't see the email, be sure to check your spam folder. You'll be prompted to change your password to something easy to remember. Once you've done that, you'll be automatically logged in and will remain logged in unless you choose to log out.



2. Main Page

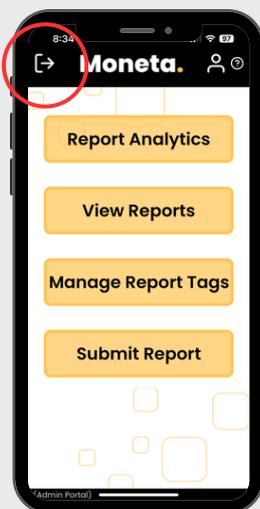


After logging in, you'll land on the main page. Here are the primary buttons you'll see:

- **Report Analytics:** View analytics on reports submitted across your organization.
- **View Reports:** Access reports submitted within your organization.
- **Manage Report Tags:** Add, delete, or modify selectable hazard classifications.
- **Submit Report:** Submit a Proactive Safety Report (PSR for Short)

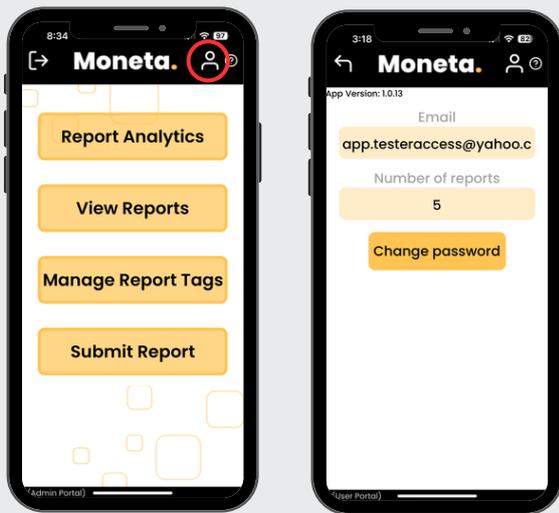
Additionally, there are clickable buttons in the upper banner, which we'll review next.

2.1. Logout button



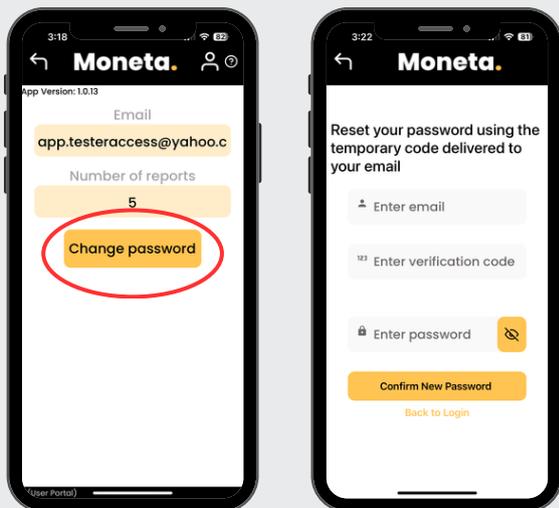
Clicking this button will log you out of Moneta. You will stay logged in even if you close the app unless you click this button. Staying logged in makes reporting quick and easy, but if you need to log out, this is how to do it.

2.2. User Information

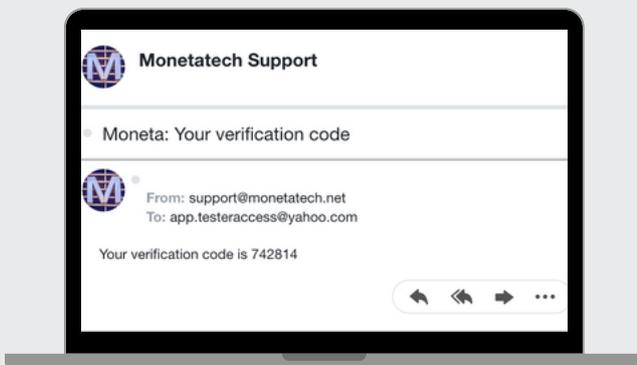


Clicking this button will display the app version you're currently using, the total number of reports you've submitted (visible only to you), and a button to change your password.

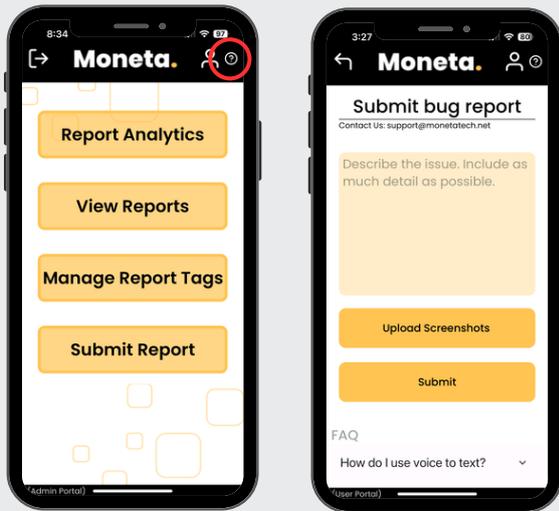
2.3. Change Password



If you want to change your password, click here. After confirming your email, you'll be directed to a page where you can enter your new password using the verification code sent to you from support@monetatech.net. If you don't see the email with your code in your inbox, be sure to check your spam folder.



2.4. Help



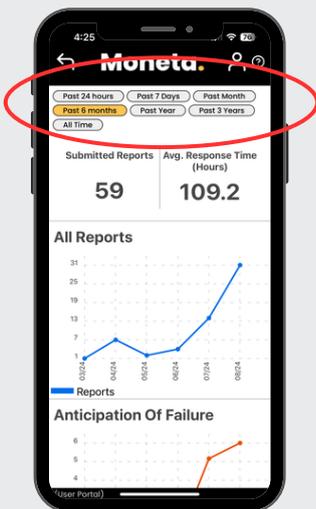
Do you have a question or did you find a glitch? We're here to help! Some FAQs at the bottom of the screen may provide the answers you need. If not, describe your issue, upload a screenshot, and submit it. Our 100% U.S.-based service team will respond within one business day—usually even faster.

3. Report Analytics



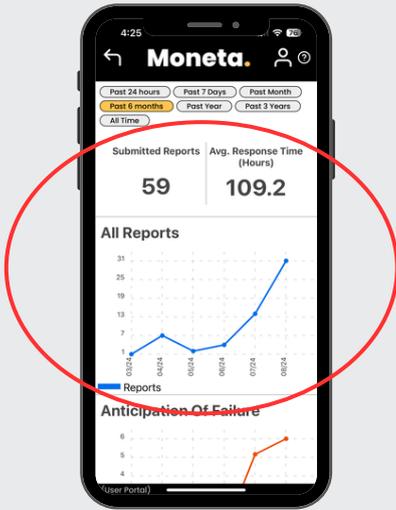
By clicking on the **Report Analytics** button, you can view analytics on PSRs across your entire organization. These analytics can help you optimally allocate resources for managing safety, both reactively and proactively.

3.1. Timeframe



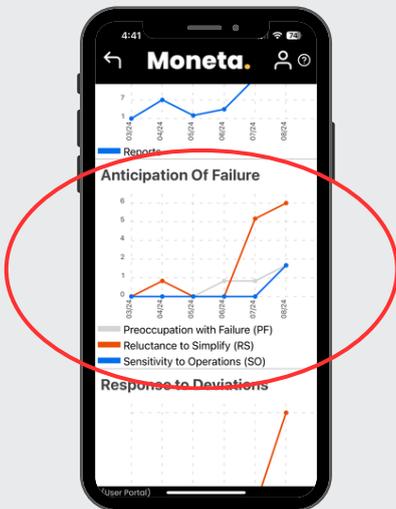
Select the timeframe you'd like to view by clicking on the corresponding tag. The analytics will automatically update to reflect your chosen period.

3.2. Usage Analytics



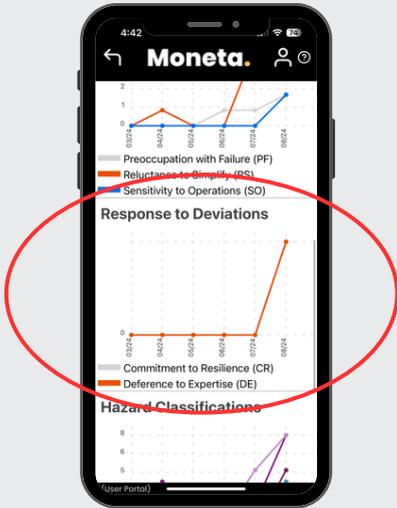
These analytics display the number of reports submitted by your entire organization over the selected timeframe, along with the average time it took for a safety administrators to add the first comment to a submitted report. Timely comments are crucial for encouraging more report submissions, so a lower average time is desirable.

3.3. Anticipation of Failure Analytics



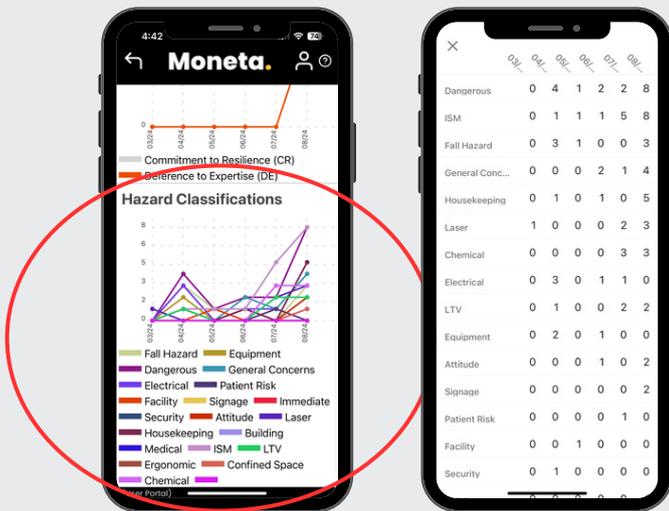
The first three hallmarks of a High Reliability Organization (HRO) are focused on the Anticipation of Failure. These hallmarks reflect the cognitive and behavioral practices of individuals within the organization, specifically how effectively the organization identifies and addresses small issues before they escalate. The analytics classify reports that indicate a shortfall in these areas—the higher the number, the more attention this area requires. While our AI automatically classifies reports by these HRO hallmarks, you can override this classification as an administrator, as shown in section 4.4.

3.4. Response to Deviations Analytics



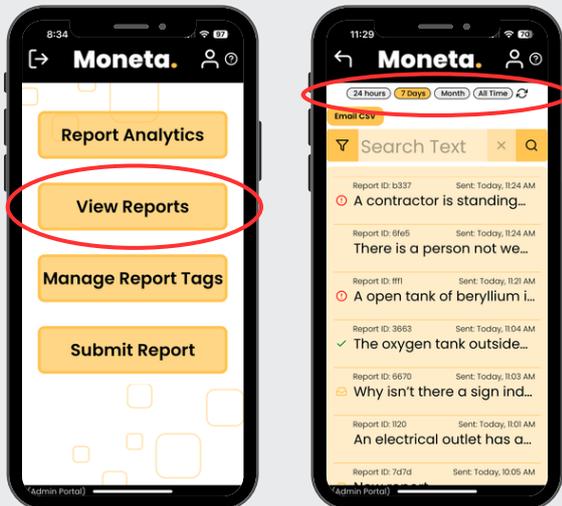
Sometimes things go wrong, and normal operations are disrupted. How well does your organization recover? These analytics focus on the last two hallmarks of a High Reliability Organization (HRO) and assess your organization's ability to bounce back from disrupted operations. A higher number indicates that more attention is needed in that area. As noted earlier, these classifications were generated by our AI but can be overridden by an administrator if necessary.

3.5. Hazard Classification Analytics



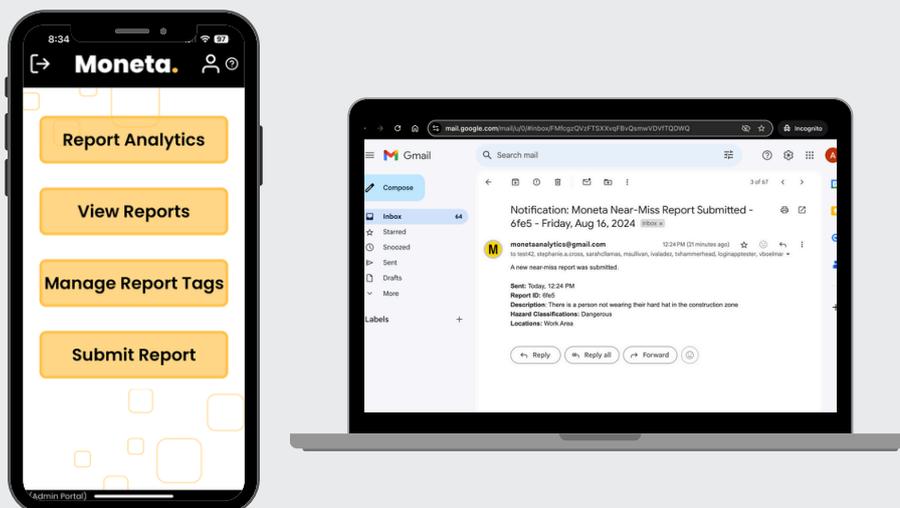
These analytics display the classification of hazards based on user selections during report submissions, combined with those identified by our AI. The graph might seem a bit overwhelming, but you can click on it to switch to a tabular view of the analytics for a clearer presentation. These classifications, made by both reporters and our AI, can also be overridden by administrators, as shown in section 4.4.

4. View Reports



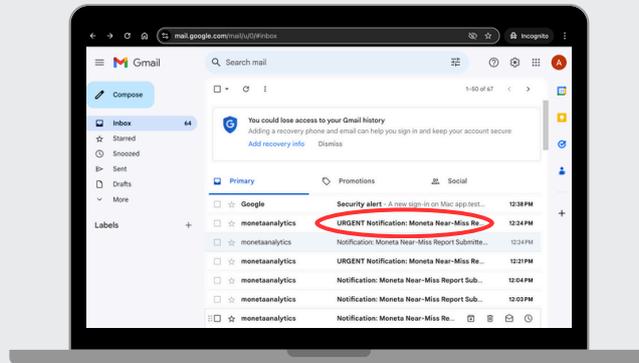
Clicking on the **View Reports** button will display all the PSRs that have been submitted in your organization over the selected timeframe.

4.1. Submission Notification



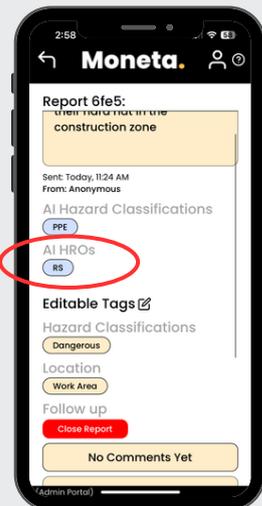
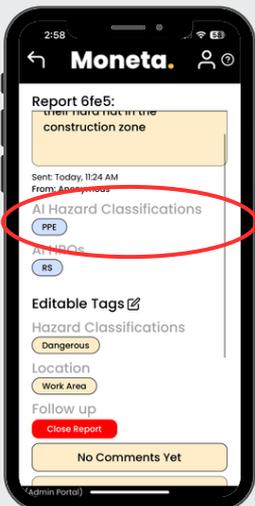
You will receive both a push notification and email when a PSR is submitted.

4.2. Urgent Submissions



PSRs marked as urgent will display a red exclamation point in the Moneta app and will also be flagged as urgent in the email subject line.

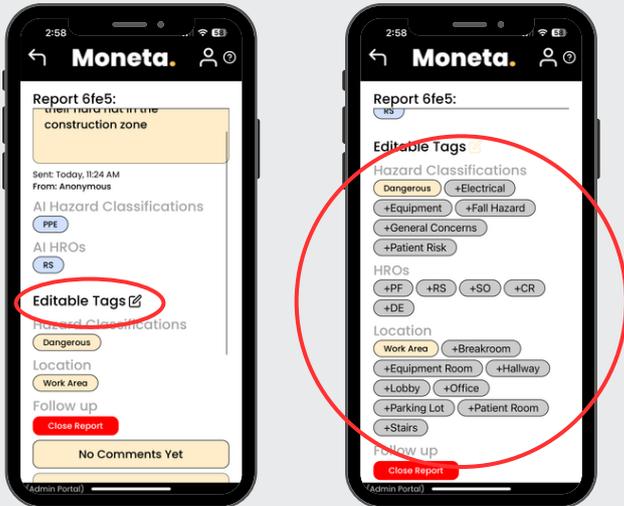
4.3. AI Classifications



Our AI is powered by the latest scientific advancements. We incorporate models of human cognition and situational awareness in training our AI, achieving interrater reliability comparable to that of humans. Our AI automatically classifies submitted PSRs by both the hallmarks of a High Reliability Organization and by the hazard classifications defined in section 5.1 by your organization.

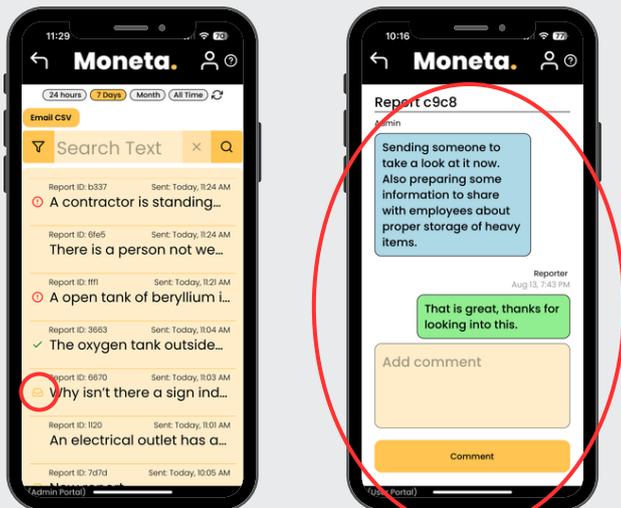
4.4. Report Reclassification

While our AI is impressive, there is no substitute for human interpretation. Additionally, reporters may sometimes mislabel or miss certain classifications. To correct any misclassifications that might occur, safety administrators can reclassify the Hazard Classification, HRO, and Location tags by clicking on the **Editable Tags** button. Doing so will not only ensure that reports are accurately reflected in the analytics but will also help retrain our AI on your reclassifications, improving its accuracy for future reports.

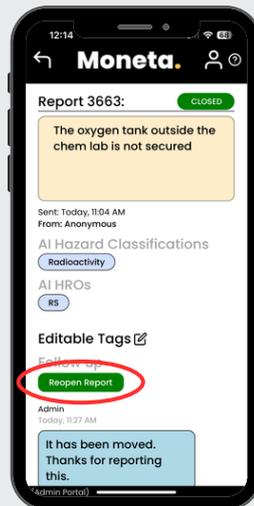
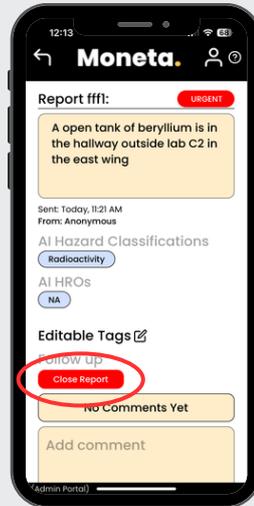
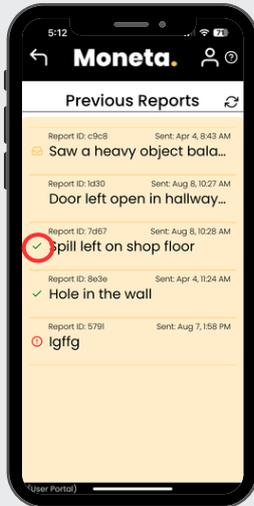


4.5. Follow-up Communication

You can engage in two-way communication with reporters by clicking on a report, regardless of whether it was submitted anonymously. This is often necessary for follow-up investigations. We encourage you to respect anonymity and avoid asking reporters to identify themselves in your comments. Once you or another safety administrator comments on a report, a yellow inbox symbol will appear next to it. The reporter will also receive a push notification, notifying the reporter that a comment has been made.

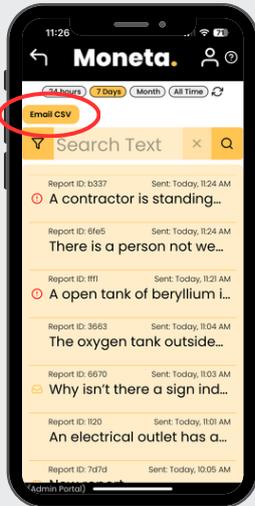


4.6. Report Close-Out

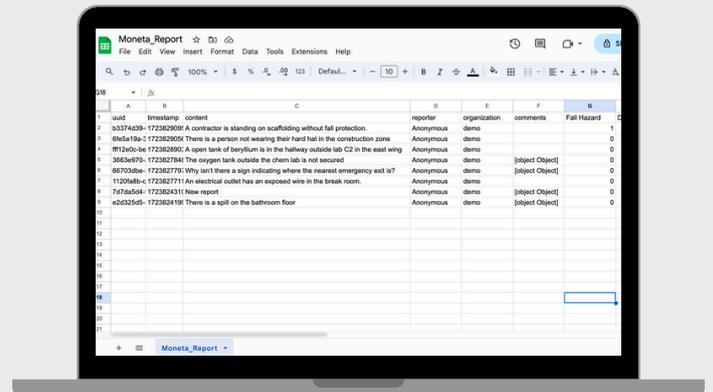
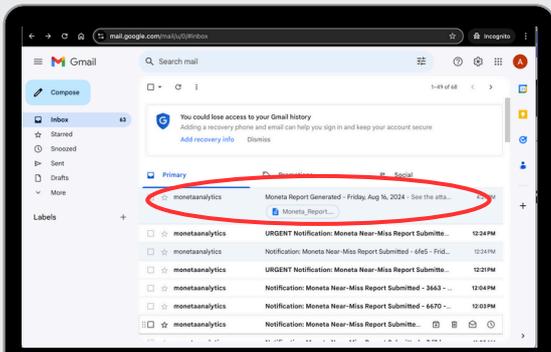


You can close out a report by long-pressing the **red Close Report** button. The report will be marked as closed with a **green Closed** indicator in the upper right corner, and a **green checkmark** will appear next to it on the View Reports screen. If needed, you can reopen the report by long-pressing the **green Reopen Report** button. Please note that reporters will not be able to comment on closed reports, so the report will need to be reopened to allow further communication.

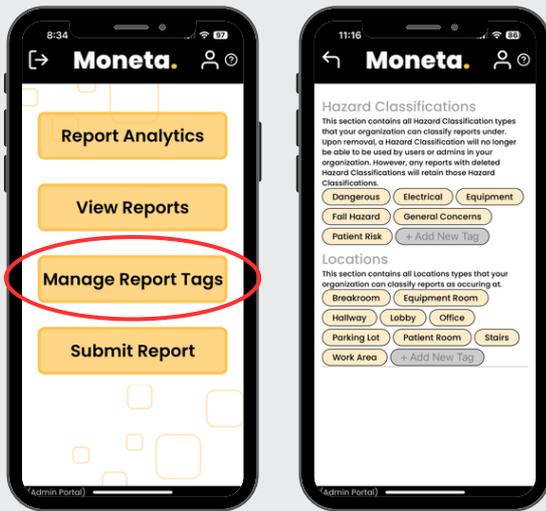
4.7. Download All Reports



Want the reports offline? No problem— just click the **Email CSV** button in the upper left-hand corner. An CSV file will be sent to your email address with all reports submitted during the timeframe selected at the top of the screen. You can use this information to build your own analytics or however you choose. Please note that the anonymity of reporters is preserved in the downloaded CSV.

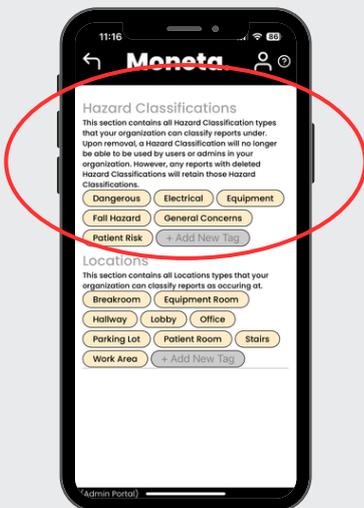


5. Manage Report Tags



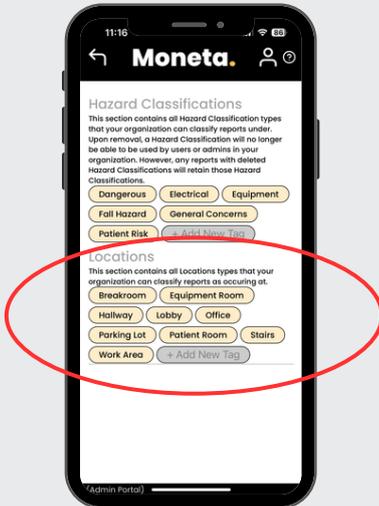
In addition to classifying reports by the HRO hallmarks, reports may also be classified using tags defined by your organization. These user-defined tags allow for hazard classification and location tracking that can be customized to your needs. You can modify these tags at any time, providing the flexibility to focus on specific areas and hazards of interest.

5.1. Hazard Classification Tags



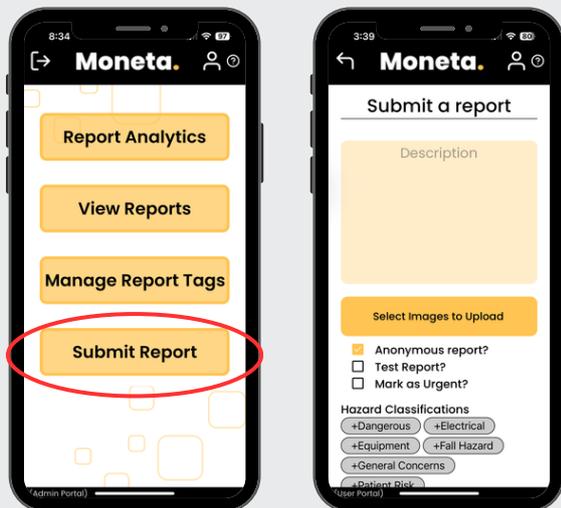
These tags often correspond to OSHA, JCAHO, or other relevant regulatory bodies, but can be further customized to address specific safety hazards relevant to your operations. These tags will be selectable by reporters, and our AI will be continuously trained and re-trained to recognize and apply them accurately.

5.2. Location Tags



A selectable set of locations can be defined for your organization, primarily to provide analytics on submitted reports rather than to pinpoint the exact location of a reported hazard. If a more precise location is needed, reporters may be asked to specify this in a follow-up comment, as shown in Section 4.5. To avoid overwhelming users, we recommend keeping location tags at a high level, with more detailed options only for areas of specific interest. Please note that the AI will not be trained on location tags, so analytics will only reflect the locations selected by reporters.

6. Submit Report



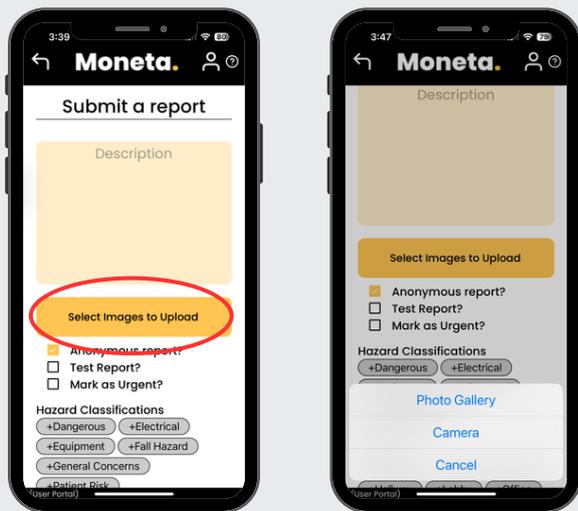
Safety administrators are reporters too! Set a good example by submitting PSRs regularly. In many highly reliable organizations, users of the Moneta app report more than one PSR on average weekly. Report any active or latent hazards you observe, and include any safety suggestions you may have.

6.1. Report Description



Clicking anywhere in the description box will bring up the keyboard, allowing you to enter your report—short and sweet. Typically, PSRs are only 2-3 sentences, covering both objective and subjective details. You can also use voice-to-text for an even easier way to enter your PSR report.

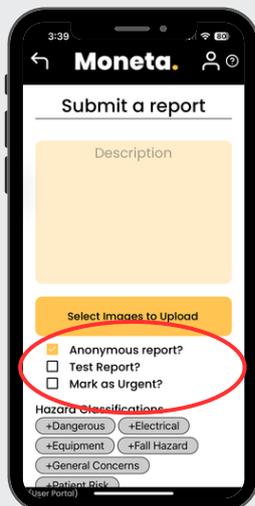
6.2. Image Upload



Sometimes a picture is worth a thousand words. Click on **Select Images to Upload** to include an image with your PSR. You can either choose an existing image from your phone or use the camera to take a picture directly within the app.

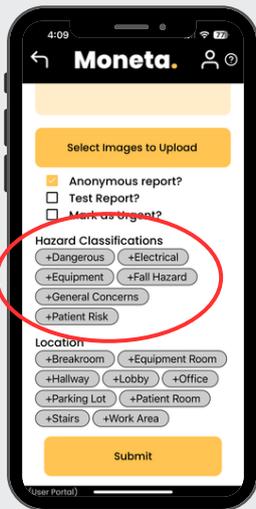
6.3. Checkboxes

When submitting a PSR, there are a few checkboxes to keep in mind:



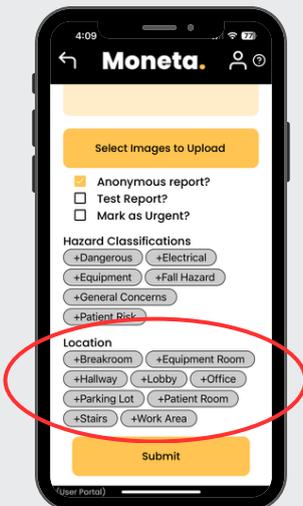
- **Anonymous Report:** This box is checked by default but can be unchecked if you prefer. Anonymity is often highly valued by employees, and we encourage safety administrators not to discourage anonymous reporting of hazards.
- **Test Report:** If this box is checked, the report won't trigger notifications to administrators or be included in analytics. This option is primarily for training purposes.
- **Mark as Urgent:** Some things just can't wait. If you check this box, your report will trigger urgent notifications to all safety administrators at your organization.

6.4. Hazard Classifications



These are the safety hazard classifications added by safety administrators in section 5.1. Reporters can select one or more tags, and our AI will also classify submitted reports based on these tags.

6.5. Locations



These are the locations added by safety administrators in section 5.2. Please note that our AI does not automatically classify reports by location, so if a location tag is not selected, the report will be excluded from location-based analytics.

7. Contact Us

Have questions? We're here to help! We respond to questions within one business day. You can also reach out to us directly through the Moneta app.

- **Phone**

 +1(806) 853-7160

- **Message**

 support@monetatech.net

- **Website**

 www.proactivesafety.ai

- **Address**

 3911 4th St, Lubbock, TX 79415

MM®

