How to set up the EHS Clearance report (people with ‘EHS User’ Role)

At least one person in each school/centre will be set up with the ‘EHS User’ role. Refer to ‘EHS Requisition Approval Checklist’ for actions to take once you receive the report.

1. Select “Reports” heading then select “EHS Report” from drop-down menu then “Clearance Report” which will prompt the “Clearance Monitor Report” window.

2. Follow instructions in the Clearance Monitor Report Window as follows:
   
   - **Output Type**: Select “CSV” file type
   - **To**: Select who the report will be sent to by pressing “To” button or type in an email
   - **Site**: Select the appropriate School / Centre
   - **Requestor Organization**: Select the appropriate organisation required for the report (e.g. research group heads – leave blank if you want the whole school report)
   - **Schedule**: Click button to reveal scheduling options and select your preferred frequency (e.g. tick each day if you want a daily report etc.)

3. Press “Submit Report” to complete setting up the report.
Accessing and Clearing the chemical from the Clearance Monitor

1. Login into App website  https://newapps.unsw.edu.au/
2. Open “ERM Clearance Monitor”

3. Once in Clearance Monitor, click on the “Review Transaction” button. If the text next to the icons is not displayed, right click on an icon and choose ‘show text’

4. Click on the ‘Search criteria’ button to select the site (and organisation if applicable) for which you are responsible for EHS clearance

5. Select the Site (and organisation if you are just responsible for a particular centre or group)

Use the \( \rightarrow \) arrow to transfer your chosen site to the right hand side panel

Then press OK
5. Change the date to suit your preference (it defaults to 7 days prior to current date).

6. If you just want to review transactions made by a particular person click on the Requester button and choose a name (begin the search using last name) otherwise clear to display All.

   Place your cursor on the day and then scroll up or down using the arrows to change the day. (Place on the month and scroll to change the month)

7. Use the refresh button to update the results after making any change to location or date

8. Select Requisition to display all requisitions meeting your search criteria (i.e. based on locations and date) that require EHS approval (Container transactions are generally not subject to EHS approval)

9. Using the EHS Clearance report cross reference the required data such as date, material name, originator etc. with the columns in this clearance monitor. Select the first item to be cleared:

10. Notice the ‘regulations’ causing it to appear on the EHS clearance list are listed

11. Click on the Code of Practice icon to see what the requirements are for this substance.

12. Click Next to see the next code of practice if the substance is associated with more than one hazard category
13. Use the EHS Requisition Approval checklist to identify if the controls required to manage the substance are in place.

14. If controls are in place tick Approved (consult with requester if further information is required or permits need to be sighted)

15. If controls are not in place tick Rejected (consult with requester to let them know the outcome)

16. Select the next item on the list.

17. Repeat steps 10 to step 15 for each item on the list

18. When all items completed press “Save”