II.Scheduling Procedures

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A. Inactive entities

If an Entity's status is <u>inactive</u>, please check the entity notes to find out more information on why it has been made inactive. The entity could be inactive due to past due invoices or other accounting issues. If you encounter an Inactive Entity, contact the Accounting Department for further action. <u>NEVER remove</u> the note from a company profile- this should be done by accounting ONLY!

B. Class Scheduling

When emails are received for scheduling, ALWAYS pay attention to all ENTITY SCHEDULING NOTES and LEGACY ID NUMBERS. If a request is submitted via email with a signature that is not listed on the account, you must call the company and speak with one of the active users on the account. If an active user is not available for approval, please request approval from your supervisor. Save all scheduling emails for up to 6 months after the schedule date. This will ensure that an electronic trail is kept in case any questions regarding the schedule arise.

Emails should include:

- 1. Date of training
- 2. Name of participant
- 3. Classes
- 4. Time of training (if not listed call the company for confirmation)
- 5. PO number if required
- 6. Last six digits of the trainee's social security number or Passport number.
 - **Passport numbers:** should be entered into the system always using three zeros followed by the first six digits of the passport number located at the top right of the photo page on the passport. If they have letters followed by numbers, we do not turn the letters into zeros; we skip letters and use only numbers. However, if the passport number does not have enough numbers, use what is available followed by zeros. ALWAYS include the original passport number in the participant's profile. If the passport and email it to customer service. Never run social security verifications on participants using passport numbers. If a social security verification is ordered under a passport number, please contact the Background Department immediately.

Steps on Scheduling

- a. Choose the entity you are scheduling for
- **b.** Choose the location
- c. There are two ways an owner course can be scheduled

Using the Owner Column

- a. Type the course code/ name or scroll through the pages until you locate the name of the owner site
- **b.** Click in the box next to the site of your choice

Using the Order Training button

At the bottom of the page click the Order Training button

- **a.** A new window will open. Type in the course code in the search box and click ENTER on your keyboard. If you type in the exact code only one course will come up, if you type in the name, several courses may come up. (You can select several courses at one time in this screen)
- **b.** Click the box next to the course needed and click select.
- c. When the course appears in the grid click on the Status
- Status
- Schedule- You can Schedule
- In Progress- the participant is already scheduled for the course
- **Cannot order-** The participant is not eligible to take the course
- **Pass, Failed, or Expired** this is the last status captured for the course **CLICK** on the status and resume scheduling.
- **d.** To the right of the page a new window will open and you will need to select the date and time the employee will attend the training.
- e. Change the date by clicking on the calendar box or entering the date and clicking search.
- f. Click in the circle next to the day of the time needed and click the book
- g. You will need to repeat steps 3 and 4 for each class that needs to be scheduled
- h. Click the SUBMIT ORDER button at the bottom of the page once all classes have been booked with a date/time. A box will appear showing what class/classes have been scheduled
 Note: Green- dictates pending submit and Red- Cannot Schedule.
- i. Click Submit
- j. OPTIONAL type in a PO number if the company requires one to be on the billing invoice
- **k.** Click Submit and print the confirmation page if needed

C. Non-Reciprocal ARSC scheduling

Valid Identification is required to take training at ISTC. The only exception to this is for ARSC branded courses. All ARSC courses can be scheduled without using valid identification using the NON-RECIPROCAL version of the ARSC branded course code. (Example: 09BNNR- Basic Plus, 09BN1NR-Basic Refresher, A09CSENR- Confined Space.) When taking a Non-Reciprocal Basic Plus, a 09MARSECNR class must also be scheduled.

Participants that need an ARSC branded course but do not have valid identification the following steps should be administered:

- a. Schedule the participant for the ARSC branded course code if the system allows it.
- **b.** Immediately NOSHOW the ARSC branded course code.
- **c.** Schedule the participant for NON-RECIPROCAL code that coincides with the ARSC branded code. (If Atlas states time is overlapping contact an approved employee open another time slot for scheduling)
- **d.** Check in the course(s) following normal procedures.
- e. Allow the participant to train, and receive yellow badge.

When the participant comes back with valid identification, approved personnel will follow the steps below:

- **a.** View the Participant training history and make sure the PASSED Non-Reciprocal and NO-SHOWED ARSC branded course codes that need to be changed are on the same date.
- b. Edit all PASSED Non-Reciprocal codes for the date in question to NO-SHOW
- c. Edit the coinciding ARSC branded course codes to PASS
- d. Print white ARSC badge

This will allow billing of correct prices and the data tracking of the reciprocity change.

D. Coached class scheduling

The Customer Service Supervisor will coordinate dates and times that coached courses will be offered with the Participant's company. Only check in a participant for a coached class after a Coached Waiver has been put into the Participant's Exceptions.

When checking in the participant, *remember* to highlight the routing card to inform the instructors of a coached 09BN. If a student fails any coached class, approval must be given by the Owner Site Representative to retake the class. Once we have approval from the site to retake the course, then we can get approval from the contract company to reschedule.

ADA Accommodation Procedures

ISTC's Operational Guide for Training Programs outlines the program directives for all reciprocal programs. Section IV, C states that, "The Programs shall be taught in English for the purposes of reciprocity". Successful completion of the program must be accomplished in written English. Any other test format (Spanish, oral, etc.) will not be acceptable in terms of the reciprocity agreement and may have validity only on a local level." ISTC understands the need to accommodate contract workers who have a certifiable reading/writing disability as outlined by the Americans with Disabilities Act and documented by a physician qualified in the assessment of that disability, therefore this NON-WRITTEN EXAMINATION PROCEDURE has been created. The following procedures must be followed for all examinations requested in a non-written format that have owner courses needed.

Prior to scheduling ANY participants requesting coached classes must present an original documentation from a qualified physician outlining the reading/writing disability of the worker that request the special testing. This document MUST include the certified disability under the Americans with Disabilities Act. This document should include the physician contact information and must be on company letterhead.

E. ISTC Walk in Scheduling

A student may only schedule courses located on the website <u>www.istc.net</u> within course lists from the following groups:

Core Programs ARSC Reciprocal Courses BEST Complex Courses Operator Qualification Courses Other Courses Specialized Training classes

To Schedule a Walk-In Participant:

- a. Ask the participant for their valid identification and social security card.
- **b.** Go to the search box in the Participants tab and have the participant type in their social.
- c. If it is a new participant, add them into the system using the Add button. For existing participants compare the information in ATLAS to the identification presented. Always match the information that is on the social security card.
- d. Click the Schedule button
- e. Add the ISTC walk in entity id number of 52434.
- f. Using procedures from Class Scheduling section, schedule training that is needed.

ALL TRAINING UNDER ENTITY 52434 WILL BE COD!

A contractor or owner company must schedule ALL Site Specific classes and other Safety Council programs. A member of management must authorize any exceptions to this procedure.

Always contact the company for students who may state they are managers or supervisors and have a company credit card. They also must have approval prior to training.

F. BEST Complex Scheduling

If you receive a request for training at the BEST Complex, please let the customer know the below information for each training course. The customer is responsible for scheduling their employee's online using the ATLAS system. Please direct any questions regarding training at the BEST Complex that is not available below to the BEST Complex Administrative Coordinator at ISTC Extension 1134 or 409-291-4417.

- a. Fireguard/Fire watch
- b. MX6 iBrid Monitor
- c. Safety Overseer
- d. CPR /1st Aid
- e. Hazwoper Training

Fireguard / Fire watch

Offered Monday, Tuesday, and Friday and should be scheduled by 3 pm the business day <u>before</u> the class. There is a maximum of 40 per class and no minimum scheduling requirement for normal business hours. Arrival at BEST is 7:00 for sign in. PPE is required for this class and is the participant's responsibility. PPE consists of Hard hat, safety glasses, leather gloves, fire retardant shirt, fire retardant pants, and sturdy industrial boots.

Both Firewatch & Fireguard must be scheduled for the same day for BEST Complex.

Note: If a company needs a special request class the minimum is 6 and the maximum is 40. The company needs to contact BEST Complex Administrative Coordinator at 409-291-4417 to schedule the course. BEST Complex will furnish the After Hours Class Request form to the company.

Safety Overseer

The Safety Overseer course is offered on Tuesdays and should be scheduled by 3pm the business day <u>before</u> the class. The Safety Overseer Pre-requisite form MUST be emailed to <u>Trisha@istc.net</u> or <u>bestforms@istc.net</u> immediately after scheduling, and each pre- requisite must be initialed. The Participant must have a valid Basic Plus/Refresher, 09MO, 09MOLDAR, 09MOPMTR, 09RCSP, 09FG, and A09FWA before scheduling. There is a maximum of 15 students with no minimum scheduling requirement during normal business hours. Arrival time at BEST is 10:30 for sign in. PPE is required for this class and is the participant's responsibility. PPE consists of Hard hat, safety glasses, leather gloves, fire retardant shirt, fire retardant pants, and sturdy industrial boots. This class must be scheduled by the company, no walk-ins allowed.

Note: If a company needs a special request class the minimum is 6 and the maximum is 15. The company needs to contact BEST Complex Administrative Coordinator at 409-291-4417 to schedule the course. BEST Complex will furnish the After Hours Class Request form, Safety Overseer form and ISTC registration form to the company.

CPR/1st Aid

All requests should be directed to the BEST Complex Training Coordinator at 409-291-4447 for scheduling.

Hazwoper Training

Has a minimum scheduling requirement of 6 for each class. Refer company to BEST Complex Training Coordinator at 409-291-4447.

<u>MX06</u>

Offered Monday's at 11:00 am and should be scheduled by 3 pm the business day <u>before</u> the class. Arrival time at BEST is 10:30 am for sign in.

Prerequisites for MX6 are A09FWA, 09FG, 09ST, Basic Plus/Refresher. Participant must wear long pants, close toed shoes and shirt with sleeves. Short sleeves are allowed. No shorts, sandals or tank tops allowed. This class must be scheduled by the company, no walk-ins allowed.

Note: If a company needs a special request class the minimum will need to be 6 and the maximum will be 20. The company needs to contact BEST Complex Administrative Coordinator at 409-291-4417 to schedule the course. BEST Complex will furnish the After Hours Class Request form to the company.

G. After Hour Classes

A company can request all ISTC Courses at any location *after* the normal business hours. Each location and involved departments of ISTC should have on call staff scheduled to accommodate these requirements. Companies should never be refused or turned away for any after hour classes by an employee of ISTC unless directed by Management. A request can be made 24 hours a day without being pre-scheduled.

After Hours Class Request

If a company asks if classes can be offered after normal business hours, explain to the company that a minimum number of classes must be agreed to be either taken or paid for.

If the company needs a Basic Plus or Basic Plus Refresher they will need to schedule 10 students or pay for a minimum of 10 classes at the designated rate that coincides with their membership status. If the company only needs a site specific, they will need to schedule 20 classes or pay for a minimum of 20 classes at the designated rate that coincides with their membership status.

The After Hours Request form that can be found in the Documentation section of <u>www.istc.net</u> must be filled out by ANY company that wishes to pay for an After Hours course.

<u>EXCEPTION</u>: An owner facility can require an After Hours class for a verifiable plant emergency. In this case the form will not be required.

The After Hours Class Request MUST be completed and submitted via email to the Customer Service Supervisor or the VP of Operations.

<u>Note:</u> The After Hours Request Form must be received before any classes are scheduled unless it is a verifiable plant emergency in which the Customer Service Supervisor or VP of Operations will approve training without the form. Confirm that there is an After Hours contact number that someone with the company requesting classes can be reached at. If the company is a non-member, payment must be provided prior to scheduling a course. Members will be billed.

Once the After Hours Request form is approved and signed by the VP of Operations, it will be given to the Customer Service Supervisor and the following steps must be taken:

- a. Have the Customer Service Supervisor or an approved person create a schedule in ATLAS for the date and time requested in the designated After Hours Room.
- **b.** Contact the company once the classes have been opened in ATLAS.
- c. Verify that the on call employees are aware of the class.

Day of After Hours Class

- a. Staff members are to arrive at ISTC 30 minutes before the scheduled class.
- **b.** CBT Lab personnel must turn on computers and prepare coffee for students.
- c. Use standard check in procedure.
 - Note: A period must be placed in the PO field for EVERY CLASS for EVERY PARTICIPANT for ANY after-hours class (week day & weekend). If there is already PO # in the PO field, place the period at the beginning of the PO #. <u>DO NOT</u> <u>DELETE A PO # THAT IS ALREADY IN THE PO FIELD!</u>
- d. Process payment for non-member entities

Note: If entity is a non-member a daily deposit must be done for the day. If the class is during the week after normal business hours, the daily deposit will be amended for that day.

- e. Give all After Hours Request forms to Accounting when training is complete Nederland- Place forms in the designated Accounting box behind Customer Service Baytown- Place forms with any deposits to be brought to the Nederland Training Center
- f. If deposit is created it will be kept in a secured locked drawer to be delivered to accounting the next business day.

H. Specialized Training Courses

All specialized training requests must be directed to the Training Coordinator for customer information and available dates. Once agreement is reached for an available date and minimum of students for that particular course the customer will complete the <u>Specialized Training Class Request</u> form. The form will be signed by the VP of Operations, Customer Service Supervisor, or the Training Coordinator. Copies of the forms are given to accounting, Customer Service and the Training Coordinator. The Training Coordinator will notify the Customer Service Supervisor or approved personnel will create the schedule in ATLAS.

Instructors for Specialized Training classes will complete the following forms and distribute them as indicated:

- a. <u>A Class Roster</u> with student Information that must include the last six (6) numbers of the student's social security number. A copy of the roster will be given to Customer Service for scheduling purposes and distribution to Accounting department after accreditation of the course is given.
- b. <u>Social Security Verification Form</u> for each student. All copies will be provided to Customer Service for processing and finally to Accounting.
- c. <u>Specialized Training Post-Class Evaluation Form</u>. All copies to Training Coordinator for review and distribution to VP Operations as needed.

Following proper completion of all forms, Customer Service will print badges as needed. Training Coordinator or Customer Service will print class certificates for signature by VP Operations and the Instructor. Instructor will distribute the certificates and badges to the students as appropriate.

J. Other Safety Council Courses

The following are procedures used to login, validate training history, and register participants for Web Based Courses. When registering any online courses NEVER ADD P.O. numbers.

01- Mobile, AL

Username: megan@istc.net

Password: istc2565

To view training history

- a. Hover over the Reports column
- b. Click "Training History"
- c. Type the Participant's full social security number in the Student Identifier box
- d. Click Search

03- Corpus Christi, TX Member id #: 11009

Username: istc11009

Password: davidross

To register for courses

- a. Click on the Lightning Bolt icon
- **b.** Choose the date of training.
- c. Click participants: Enter the social security number and click on the add or enter
- d. Select courses and click into the box of each desired course.
- e. Select confirmation and at this time confirm that everything is correct and either cancel or submit request.
- f. Proceed to check the participant in by clicking the "Check in" icon
- g. Enter the participant's social or scan the routing slip social then submit.
- h. Select course then check in.

To view training history

- a. Select the "Reports" icon
- b. Click on the Trainees tab
- c. Click the dot next to "History by SSN"
- d. Enter social security number
- e. Click "Output"

04- Brazosport, TX

Username: istc1234 Password: 324istc (Registration is not needed for this council)

To verify training

- a. Hover over the Training Tab and click "Web Based Learning"
- b. Type the Participant's full social security number and click Login
- c. Click the Participant's Training History Details tab
- d. Sort training by clicking "Date" or "Description

05- Longview, TX

Username: istc1493 Password: istc1493

ALL courses beginning with 05 will be scheduled via the Houston Area Safety Council website.

To verify Basic Plus or Basic Refresher training

- a. Hover over the Training Tab and click "Web Based Learning"
- b. Type the Participant's full social security number and click Login
- c. Click the Participant's Training History Details tab
- d. Sort training by clicking "Date" or "Description"

06- Port Lavaca, TX

Username: admin

Password: scheduling

To verify training

- a. Hover over Trainee tab
- b. Click Search
- c. Type full social security number and click search

07- Texas City, TX

Member id #: 0300

User Email: patty@istc.net

Password: webreg2

To register for courses

- a. Click on Participant Registration
- b. Click on External Registration
- c. Enter Date, Social Security Number, and Client ID #

Note: If the entity id number does not work, then you will need to call the Texas City Safety Council and give them the entity id number to the company so they can add that company in their system.

d. Click Add Trainee

Note: If this student has never been registered in Texas City before then you will have to add them in as a new participant and do step c again.

e. Choose the class that the student will need to take.

Note: Normally the course will be defined as external (i.e. if the student is taking the Valero class then you will want to click on Valero External).

To view training history

- a. Select "Training History". When the drop down box appears click on, "History by SSN".
- **b.** Enter the participant social security number and click search.

Note: Always click on search. If you click the enter key the history will not appear.

08- New Orleans, LA

Username: istc

Password: nederland

Account# 1700

To register for courses

- a. Click the Web Registration icon
- **b.** Select the schedule date.
- c. Click the Trainees tab, type social security number then click the Add button

Note: If a student has never taken a New Orleans class before, after adding participant you will have to go back and start over from step a.

- **d.** Click the Courses tab and choose courses that need to be scheduled.
- e. Click the Confirmation tab and then submit to process request.

To verify training history

- **a.** Select the Training History Verifications icon.
- **b.** Enter the participant social security number.
- c. Select the option of all records or Current records and click Submit.

10- Charleston, WV

Username: 09ARSC

Password: SAFETY

To verify training

a. Enter the participant social security number and click the Get Info

11- Shreveport, LA

Username: admin845

Password: 845admin Member #: 845

To verify training history

- a. Click Trainee Training History Verification
- b. Type trainee's social security number and click Go

12- Baton Rouge, LA

Username: nederland

Password: headphone (Registration is not needed for this council)

To verify training history

- a. Hover over the Training Tab and click "Web Based Learning"
- **b.** Type the Participant's full social security number and click Login
- c. Click the Participant's Training History Details tab
- d. Sort training by clicking "Date" or "Description

13- Lake Charles, LA

Login id: istc324 Password: 324istc (Registration is not needed for this council)

To verify training history

- a. Hover over the Training Tab and click "Web Based Learning"
- **b.** Type the Participant's full social security number and click Login
- c. Click the Participant's Training History Details tab
- d. Sort training by clicking "Date" or "Description

14- Midland, TX (West Texas)

Username: <u>scheduling@istc.net</u>

Password: nederland

To register training

- a. Click the Student tab
- **b.** Type full Social Security in the Search box and click enter to search

Note: If the trainee has never been in the system, you will have to add them by clicking the Add button and entering their information.

- c. When their profile comes up, click their name to highlight and then click the Schedule button.
- d. Choose Industrial Safety Training Council as the location
- e. Click the Add Course or Service button
- f. Search for the course by typing in the code in the search box and clicking enter
- g. Click the box next to your desired course(s) and click the select button
- h. Click each course individually, choose the date and time of schedule, and book
- i. Submit the order

To verify training

- a. Click the Student tab
- b. Type full social security number in the search box and click enter to search
- c. Click the History button

15- Borger, TX (Texas Panhandle)

Username: ISTC Password: ISTC09 Account #: 766

To register for courses

- a. Click the Web Registration icon
- **b.** Agree to the Terms of Service
- **c.** Select the schedule date.
- d. Click the Trainees tab, type social security number then click the Add button

Note: If a student has never taken a Borger class before, after adding participant you will have to go back and start over from step a.

- e. Click the Courses tab and choose courses that need to be scheduled.
- f. Click the Instructions tab and type in your first and last name in the spaces provided
- g. Click the Confirmation tab and then submit to process request.

To verify training history

- a. Select the Training History Verifications icon.
- **b.** Enter the participant social security number.
- c. Select the option of all records or Current records and click Submit.

18- Mid-Atlantic

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Username: ISTC324 Password: arsc324
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To verify training history

- a. Type full social security number AND last name
- b. Click Search

19- Houston, TX

Username: ISTC

Password: 2565istc

To register training

- a. Log in to the website by clicking the red login icon
- b. Select the Register tab
- c. Type the Participant's social in the Trainee ID box

Note: Add participant at this time if they have never been entered into the HASC system

- d. Click Continue
- e. Choose Industrial Safety Training Council location
- f. Choose date
- g. Search for course code in the search box provided
- h. Click Select next to the course(s) needed
- i. Click Continue
- j. Click Continue
- **k.** Click Submit

To verify training history

- a. Click Status tab.
- **b.** Enter participant social security number.
- c. Select Course History and choose ALL to view all training records (Expired and current).

20- Tennessee Valley Training Center

Member ID: ARSC09 Username: ISTC Password: ARSCSAFE

To register training

- a. Hover over the Services Tab
- **b.** Click Virtual Safety Council
- c. Log in to council using above information.
- **d.** Click blue Register button.
- e. Click Add Student.
- f. Search for the student by entering the last four of the social security number and clicking Enter on your keyboard.
 - If the student does not appear on the list, click Add New
 - First Name, Last Name, DOB, and SSN are required to be entered before saving the profile.
- **g.** <u>IMPORTANT</u>: You must write the Student's ID number down on their routing slip. This number is required when logging into the TVTC Course Launcher.

- h. Click on the student's name and click the OK button.
- i. Click the box next to the student's name and click the Next button.

Note: You may add more than one student at this time.

- j. Input Completion date. This will always be the date of training.
- **k.** Click the box next to each course needed.
- I. Click the Next button and submit.

To verify training history

Username: arsc09

Password: SAFETY

a. Enter participant's social and click the Get Info button.

21- Delaware Valley

Username: scheduling@istc.net

Password: istc123

To verify training history

- a. Hover over the Training Tab and click "Web Based Learning"
- b. Type the Participant's full social security number and click Login
- c. Click the Participant's Training History Details tab
- **d.** Sort training by clicking "Date" or "Description

22- Lewisville, KY

Username: istc09

Password: mysafety

To verify training history

a. Enter participant's social and click the Get Info button.

23- Evansville, IN

Password: s4ft3y

To view training history

- **a.** Enter participant's last name in the search box and click enter.
- **b.** You will have to sort through the trainees individually. Make sure the photo matches the person in front of you.

24- Cheyenne, WY

Username: wmscguest

Password: wmsc

To view training history

- a. Type in the last name and last four of the trainee's social security number
- b. Click the magnifying glass icon that says "FIND"

Note: If up-to-date training does not appear, check the booklet at the top right hand corner and it will show how many records are found for that person. Click the arrow to sort through the records.

<u>26- Tulsa, OK</u>

Username: arsc09

Password: safety

To verify training history

- a. Hover over the Training Tab and click "Web Based Learning"
- b. Type the Participant's full social security number and click Login
- c. Click the Participant's Training History Details tab
- d. Sort training by clicking "Date" or "Description