

III. Check-In

A. Acceptable Identification

B. Fake Identification

C. Participant & Entity Notes

D. Owner Exceptions

E. Basic Status/ ARSC Reciprocal transfers

F. Pictures

G. Active Cases

H. Participant Check-in

I. Lost Badges

A. Acceptable Identification

Students must have a valid form of photo identification. Valid for training purposes is defined as legal and legitimate. Identification documents must be the original documents, *copies or facsimiles are not acceptable*. The identification must ALSO meet the following criteria:

A valid U.S. Government or State issued identification card or license that contains a current photograph. *This document must be unexpired or expired no longer than 60 days with valid receipt of renewal.*

Examples of these include:

State Issued Driver License

State or Federal Issued Identification Card

Military Identification

TWIC Card

U.S Passport containing current photograph

Green Card/Permanent Resident Card

Employment Authorization Card

State Issued Concealed Handgun Permit

Unfortunately for the student/employee there will be no exceptions made to this policy by ISTC. The owner will determine any exceptions and the badge will be printed in yellow with the site orientation on the back of the badge. Specific training cannot be taken with an expired ID unless a waiver has been issued by the appropriate party within the Site's Safety Department. Any training taken with an expired ID must be printed on a Yellow Badge to indicate that the card is not reciprocal. Students will have to wait for official license from State to be presented to ISTC in order to have the courses switched back to a reciprocal code. *See Class Scheduling Procedures Section D for additional procedures.*

For non-U.S. trainees who do not have a valid U.S. State or Government identification, the first six digits of the non-U.S. passport numbers, preceded by zeros, would be entered into the database. Trainees who do not have a valid U.S. State or Government identification will not be issued a reciprocal code on the badge upon the successful completion of ARSC courses. These trainees would be issued a non-reciprocal code.

B. Fake Identification

Employees are required to verify identification for every student. If a fake driver's license is presented, please have the participant type in their social security number into the Customer Service tab so you can see their intended training. You are then required to make a colored copy of the identification presented and notify the Customer Service Supervisor immediately. Please hand-write the following information onto the copy:

1. Company Name
2. Entity ID number
3. Company Contact name and number from ATLAS profile
4. Last 6 digits of social security number that the trainee intended to use

The copy is then submitted to the Customer Service Supervisor. **Any participant that presents a fake ID must have a note placed in their trainee profile stating that they are no longer eligible for Motiva, Valero Invista and Chevron packaging site specific training** with the date of the offense and an inactive exception is placed in the participants profile for the following owners

- Lucite
- Motiva (09ST)
- Valero (09Vrpa)
- Chevron (09CVXPALP)

C. Participant & Entity Notes

Any notes that are put into a Participant's or Entity's profile will be viewable from the Check-in screen. Adhere to any notes in the participant notes window prior to checking the participant in for classes.

To add a Participant note

- Go to the Participant tab
- Search for the Participant's social
- Click Participant's name
- Click the Notes button
- Click Add
- Select Note type
- Enter brief description of note in the subject line
- Enter any additional information in the body of the note
- Save

To add an Entity note

- Go to the Entity tab and search for the entity number
- Click the Entity's name and click the notes button
- Click Add and select note type
- Enter brief description of note in the subject line
- Enter any additional information in the body of the note then click save

If a participant has a note regarding scheduling for a particular day you are able to verify that the note has been adhered to, you are able to delete the note prior to checking the participant in for courses. (Ex: add marsec, needs new picture, call company, and etc.)

NEVER remove any waiver, background or accounting notes from participant profiles without speaking to the person who created the note.

D. Owner Exceptions

You are able to see if a participant has an Owner Exception from the check-in screen in a "Yes" or "No" format. Detailed Owner Exceptions can be found in the Participant tab via the Exceptions button. Always verify Owner Exceptions with the Customer Service Supervisor or other authorized personnel to make sure all notes are followed through correctly. Only authorized personnel have access to add/edit Owner Exceptions.

E. Basic Status and ARSC Transfers

A Participant's Basic Plus or Basic Refresher status can be viewed from the check-in screen or the Participant's History via the Participant tab. This will show the course code indicating which council the Basic Plus or Basic Refresher was taken at and the expiration date. If the course is expired, a new Basic

Plus or Basic Refresher will need to be transferred or scheduled before the Participant is allowed to take training that has a Basic or Basic Refresher as a pre-requisite.

All reciprocating ARSC members must provide web access to other ARSC members to verify the training and review a photo of the student trained. For reciprocal purposes only those students who can be verified via web access with photo ID and training history will be acceptable for full reciprocity.

Reciprocal training records must be accessible to ARSC members and verified by the ARSC member via electronic means.

Member councils shall determine their own retest policy, but for purposes of reciprocity any student failing the program twice, on the same day, will not be approved as having a reciprocal passing grade and shall not be issued a badge with a reciprocal code. The student may retake the program the next day or at a later date and receive a reciprocal badge if the student passes the program without failing twice on that day. Any student that fails the Basic Orientation Plus-Refresher® will be required to take the complete Basic Orientation Plus®.

1. You are NOT able to transfer the course if the participant has not successfully passed the failed course here at ISTC since the fail test was recorded. Only the VP of Operations or CEO can override this rule. ALL verifications MUST be done through the originating council website before transferring.
2. Check participant's history via the participant tab to confirm if the participant has failed the course that you are attempting to transfer. If a trainee has failed the course but has retaken and passed the course here at ISTC, it can be transferred.
3. Phone verifications are only allowed if a council's website is down. REMEMBER to copy social security number that is in ATLAS and when verifying courses on a different website. **DO NOT SCAN THE BARCODE ON OTHER SAFETY COUNCIL BADGES.** Always confirm the name is identical to the identification presented (preferably the SOCIAL SECURITY CARD) and the photo matches the person in front of you if available.
4. You are only able to transfer ARSC courses (other than Basic Plus or Basic Refresher) that we offer at ISTC that start with an "A09" . If a participant has a course from another safety council that starts with an "A" followed by that council's numerical code, but we do not offer it at ISTC, contact your immediate supervisor.
5. Social Security Verifications from other councils that can be confirmed electronically should be transferred even if a current background is in the Participant's History. Background Checks can only be transferred by the Background Department.
6. If no valid 09BCG or 09SSV is found, you must schedule the participant for a 09SSV. The 09SSV will need to be scheduled and the participant will be responsible for paying for the 09SSV unless their company is willing to pay for it.
7. If the company would like to receive an invoice, you will need to receive an email with permission to schedule that includes the Company's Entity ID as well as the Participant's name and last 6 digits of social before scheduling the 09SSV.
8. If the trainee will pay, schedule the 09SSV as a walk-in under the 52434 Entity ID and walk with them to the cash drawer to perform the payment.

If the participant has taken an approved ARSC Reciprocal course from an approved ARSC council, transfer it into ATLAS:

To Transfer From Check-in

- a. Click on "transfer unscheduled" in the Check-in screen

- b. Enter the date the student took the class.
- c. Locate appropriate council and click on it.
- d. Click on appropriate code and verify to add training to participants history.
- e. Once training has been transferred, schedule the student to take 09MARSEC if needed.

To Transfer Over the phone/From Training History

- a. Go to the Participant tab and search for social
- b. Click on Participant's name and click history button
- c. Click Transfer Unscheduled button
- d. Enter the date the participant took training
- e. Select appropriate Entity ID and select appropriate Council
- f. Select appropriate Course Code
- g. Verify training and submit
- h. Add a note into the Participant's profile that indicates that the participant needs to take 09MARSEC

To Transfer as a walk- in

- a. Go to the Participant tab and have the Participant type in their social security number
- b. Click on Participant's name and click history button
- c. Click Transfer Unscheduled button
- d. Enter the date the participant took training
- e. Select appropriate Entity ID and select appropriate Council
- f. Select appropriate Course Code
- g. Verify training and submit
- h. Verify that the trainee has a valid 09BCG or 09SSV

If the participant does not have a valid 09MARSEC, schedule them for it as a walk-in under the 52434 Entity ID.

- i. Verify that the trainee has a valid 09MARSEC
- Check the participant in for the 09MARSEC using regular procedures
- j. Print the badge and alert the ISTC employee at badge pickup that a badge is on the way for the Participant.

F. Pictures

If the participant has never been to ISTC or if a red box is around their current picture, the participant must have their picture taken. If students length/color of hair, glasses, weight, or appearance has changed in any way a new picture should be taken. All hats, tinted glasses, or cellular ear pieces of any kind are not allowed in photos. All badges issued **MUST** have a clear head and chest length picture of the student.

G. Active Cases

You are able to change times and add training using the Active Cases tab for all pending cases.

1. Never remove a course from an active case. Courses should only be no-showed via the participant history by approved personnel or removed from the case altogether by the participant's company.
2. Verify all payment types before adding courses and make sure the correct type saves if any courses are added.

H. Participant Check-in

- a. Log into ATLAS and go to the Customer Service tab
- b. Ask the participant to type in their own social security number into the search box and click enter.

Note: If a student is checking in with a passport number it should be entered into the system using three zeros followed by the first six numerical digits of the passport number. If there are letters in the passport number, skip them and only use the numbers.

c. If a participant's social does not come up in the check in screen, have the trainee search for their social again in the Customer Service tab. If the trainee still does not appear, follow the steps below:

d. Try to locate the student by allowing them to type their own social into the search box in the Participant tab. If the social appears, choose the participant and click the History button. View the trainee's history to see if the training was scheduled for a different day or at a different location. If there is no training scheduled for that day, please have the participant contact their company to be scheduled for training.

e. Search for the participant's name manually in training check in. If the name is found, compare the social security number that the courses are scheduled under to the social security number that was given by the trainee.

If a student indicates his social security number is incorrect, use the following procedures:

1. Make the incorrect social security number inactive in ATLAS.
2. Add the date and your initials and the correct social in the notation field and click the edit button to save.
3. Have the company reschedule the participant or submit an email request for rescheduling under the proper social security number.

Always speak to the company for the student so that the situation is explained properly.

Note: Employees are NOT allowed to change a social security number and/or training associated with that number without management approval.

f. Once the participant shows on the Customer Service list, double click their name.

g. Verify that the students name, DOB, and gender is exactly as it is on the social security card and ID. If it is not, change ATLAS to match the social security card – including Last Name, First Name and Middle Initial.

Note: If any changes need to be made to the participant's name, birth date, or gender, you will need to view the participant's history to see if a background check has been ordered. If a background check has been ordered, you must contact the background department before changing any information. If no background check has been ordered, you are able to change any information as needed.

h. Confirm the participant's address from the identification provided and add it to the participant profile. The address listed on the identification or driver's license should be the address entered into ATLAS.

i. Verify that the participant has a valid Basic Plus or Basic Refresher if the courses they are scheduled for require it.

j. Transfer any ARSC Reciprocal training.

k. Check for any Owner Exemptions

l. Check for any notes pertaining to the participant or participant's company

m. Read the courses that are scheduled to the trainee out loud so they can verify that they are scheduled for the training that they intend to take.

n. Verify that all required training is scheduled if more than one course is needed for any site that the participant is scheduled for.

Note: If a Site Specific is scheduled but its sub-course is not, and a waiver is not issued add the course to the participant's schedule so they are able to receive a badge, but let the company know that you are doing so. (Example: 09ST is scheduled but 09STMSU & 09STSL are not. Since all 3

courses are needed to gain entry into Motiva, add the additional courses to the participant's schedule.)

- o.** Update picture if needed.
- p.** Verify identification and check the "ID Verified" box.
- q.** Verify TWIC card and check the "TWIC Verified" box if needed for Motiva or Entergy.
- r.** Click the Check in & Print Slip button.
- s.** Participant will verify that all information is correct on the screen by clicking the "I Agree" button.
- t.** Explain the Global Consent form to the participant if they are taking a course that requires a background check and verify that they understand by clicking the "I Agree" button.
- u.** Print the routing slip.
- v.** Confirm that the routing slip was printed by clicking "Yes"
- w.** Sign initials and date the top of the routing slip and send trainee to the correct training room.
- x.** If the courses need to be paid for, keep the routing slip and WALK THE PARTICIPANT to the cash drawer and take the payment.

Note: If another ISTC employee will be taking the payment, give them the routing slip.

Never give a participant a routing slip for courses that are COD before they are paid for.

I. Lost Badges

For security reasons, participants should have only one badge at all times. Employees are not allowed to sell a participant multiple lost badges. Payments for lost badges must be processed the day the badge is issued. Management is the only one who can make an exception to this rule.

Walk-in

- a.** Have participant type social security into the search field in the Participant tab
- b.** Click Participant's name
- c.** Click History button and confirm that all training and background/SSV is current
- d.** Verify that participant's identification is valid

Note: If a course in history requires a TWIC card, verify that the TWIC is valid

- e.** Click Print button and select Print Lost Badge.
- f.** Click Print and select Print Last Routing Slip
- g.** Walk the participant to the payment center and collect payment
- h.** Give participant badge with receipt.

Company Scheduled Lost Badge

- a.** Verify that all training is valid in Participant's history
 - b.** Follow normal check in procedure
- Note:** If scheduled by a non-member company, payment must be taken at this time.
- c.** Pass the 09LB in the checkout screen
 - d.** Click the Check Out & Print Badge
 - e.** Notify employee at badge pickup that a Lost Badge is printing for your Participant

Badges will not be issued to non-subscriber customers without payment. Participants will be made inactive in the system until payment is made for the past due amount.