

## **VII. Other Procedures**

### **A. New Course Testing    B. Company Badges**

### **C. Sunoco Badging    D. Mail Procedures**

#### **A. New Course Testing**

Any time a course is requested from a customer or client of ISTC they should be directed to the development department. The council that hosts the particular class will issue the course to ISTC. The class is provided and tested. Once completed it is created and opened for scheduling. This process normally takes two business days to complete.

**a.** Open email with attachment and print out the requested course.

**b.** Schedule course in the council where class is from.

**Note:** Always remember to enter TESTING DO NOT BILL in the PO# section so that the council knows not to bill for that class. You can call the council and ask for a default social or 123 45 6789.

**c.** Log into primus and schedule for a course similar to that council

For example if the council is a Houston course then schedule something like 19ALTAIR.

**Note:** Always use the client id# 88321 to schedule testing classes. NEVER use the account 4444.

**d.** Confirm that the correct class is scheduled in the hosting council. Test the course and answer all questions using the Class Observation Form. After testing the course create a testing form using the Original Testing Form doc.

**e.** Locate the GL Codes for the council and include that also on the form. Save the form in my documents as the council name and move it to the web based folder.

Once you complete the form then create a ticket in the Intranet help desk. You will select Open new course and copy the information from the Original Testing Form doc. to the ticket. **Note:** The bill code for Beaumont will be 51000 and Baytown is 51100.

**f.** Staple all three forms together and file the forms in the White Course Document Binder.

**g.** Open the class in "ATLAS" for scheduling. Call the company that requested the course to inform them it is available for scheduling.

#### **B. Company Badges**

The following procedures are to be used when a company request for ISTC to print their company ID badge

**a.** Supply the company with the ISTC website.

**b.** The company should list the following details on the form for processing

- Company Name and Client ID #
- Draft copy of the Company logo(electronically)
- Number of badges 1 sided cost \$5.00 or 2 sided cost \$8.00 per badge.
- Set up fee's preferred (Employees entered into ISTC system by company-50.00)  
(Employees entered into the ISTC system by ISTC-150.00)

- c. Pictures taken onsite (at customer location) by ISTC-100.00. Once the form and payment is received. IT Manager is notified of the request and provided with all the above information from the company.
- d. The company or ISTC will log into the Customer Work center. The steps are similar to scheduling a trainee.
- e. Located in employees ATLAS profile click the Edit Trainee located next to the trainees picture.
- f. Enter the employee's title or description needed inside the Custom Badge Options located at the bottom of the screen.
- g. Click Edit trainee to save the information, and If the trainee does not have a picture on file in ATLAS the company will need to send the employee to ISTC to take an updated photo.

### **C. Sunoco Badging Process**

- a. Log into Sunoco Badging Template and enter the participants name and choose standard or expedited shipping.
- b. Verify Shipping address
- c. Upload Badge Photo and valid ID. Save this information and submit the photo.
- d. An email notification is received that there is a badge to process.
- e. Go to Sunoco folder on the customer service shared folder and print off shipping information form.
- f. Verify ID is acceptable, if not stop process if valid proceed to step h.
- g. Verify Badge photo meets standards if no stop process if yes proceed to step i.
- h. Pull up participant in ATLAS and upload photo to participant's profile.
- i. Run a manual SSV, if invalid call the company, if valid proceed to step k.
- j. Print the badge and mail badge to address listed on shipping form via USPS.

### **D. Mail Procedures**

Mail should be delivered to the appropriate individual or department the day it is stamped. Separate the mail and change the date on the received stamp to the current date. Process the mail according to the following procedures

Checks DO NOT OPEN, checks made out to the Associated Safety Council or Southeast Texas Plant Managers. Only those made out to ISTC or BAYTOWN office only should be opened.

- a. Stamp with the Deposit Only Stamp on the back.
- b. Stamp the (current) date received on the front of the attached check stub with the Received stamp.

**Note:** Checks that come in without anything attached will be paper clipped to a blank sheet of paper that is stamped with the date of receipt. Any additional items that are in a check envelope will be paper clipped to the check.

- c. Checks are itemized, added twice, always initialed and date both receipt totals.

**Invoices (Bills) Invoices and returned statements go to accounting.**

- a.** Invoices including background invoices will be opened and stamped with the received date stamp.
- b.** ALWAYS paperclip items that were sent together.
- c.** Invoices for the CEO will be stamped and delivered to the secretary.
- d.** Invoices for Insurance Agency or Texas Work force will be stamped and delivered to the CFO.

**Credit card and Bank Statements**

ALL credit card statements and bank statements will go to the CFO, unopened but stamped with received date stamp.

**Magazines**

All Magazines will be stamped and delivered to the individuals they are addressed to.

- a.** Background Fed Ex packages will be opened and date stamped.
- b.** All mail for the Legal Counsel will remain unopened but will be stamped. Checks and mail from Taylor Landing go to Legal Counsel.
- c.** Mail to the Best Complex and all other departments will be opened and date stamped but will remain in envelope and placed in the appropriate box in the copy room.