

Customer Service Procedures

I. Opening Procedures

ISTC's standard procedure is that all opening staff should arrive at their location at least fifteen minutes prior to normal business hours. Once the building has been opened for the day all employees should be in their department at their work station ready to serve our customers.

- a. Turn on all computers in the customer service area.
- b. On each computer hold ctrl +alt+delete and type in the password "front" for each computer.
- c. Count the cash receipts drawer confirming that it is \$200.00. Initial ledger book located under cash drawer. **Signing this ledger indicates that you agree the funds are accounted for. Baytown employees should take the batch receipt off of credit card machine and include with previous day's report to be sent to Nederland.**
- d. Open ATLAS on all computers.
- e. Doors should be opened for business at the scheduled time or earlier if staff is ready.

II. Scheduling Procedures

- A. **Class Scheduling (email request)**
- B. **Inactive Entities**
- C. **Class Scheduling**
- D. **Non-Reciprocal ARSC Scheduling**
- E. **Coached class scheduling**

- F. **ISTC Walk-ins**
- G. **BEST Complex Scheduling**
- H. **After Hour Classes**
- I. **Specialized Training Courses**
- J. **Other Safety Council Courses**

A. Class Scheduling via email request

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:

- a. Date of training
- b. Name of participant
- c. Classes
- d. Time of training (if not listed call the company for confirmation)
- e. PO number if required
- f. 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 participant has never been here before, call the company and ask if they could make a copy of the passport and email it to customer service. **Never run social security verifications on participants using passport numbers. If social security verification is ordered under a passport number, please contact the Background Department immediately.**

B. Inactive entities

If an Entity's status is **inactive**, 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. **NEVER remove the note from a company profile- this should be done by accounting ONLY!**

C. Class Scheduling

- a. Choose the entity you are scheduling for
- b. Choose the location
- c. Choose courses two ways either by:

Using the Owner Column

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

Using the Order Training button

- a. At the bottom of the page click the Order Training button.
 - b. 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)
 - c. Click the box next to the course needed and click select.
 - d. 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.
 - e. 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.
 - f. Change the date by clicking on the calendar box or entering the date and clicking search.
 - g. Click in the circle next to the day of the time needed and click the book
 - h. You will need to repeat steps 3 and 4 for each class that needs to be scheduled
 - i. 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.
- j. Click Submit
 - k. OPTIONAL – type in a PO number if the company requires one to be on the billing invoice
 - l. Click Submit and print the confirmation page if needed

D. 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 code.
- 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.

E. 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.

F. ISTC Walk in Scheduling

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

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

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.

G. 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 before 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 before the class. The Safety Overseer Pre-requisite form **MUST** be emailed to Trisha@istc.net or bestforms@istc.net 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.

MX06

Offered Monday's at 11:00 am and should be scheduled by 3 pm the business day before 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.

H. 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 www.istc.net must be filled out by ANY company that wishes to pay for an After Hours course.

EXCEPTION: 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.

Note: 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 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, 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 #. DO NOT DELETE A PO # THAT IS ALREADY IN THE PO FIELD!

- 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.

I. 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 **Specialized Training Class Request** 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. **A Class Roster** 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. **Social Security Verification Form** for each student. All copies will be provided to Customer Service for processing and finally to Accounting.
- c. **Specialized Training Post-Class Evaluation Form**. 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.

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

To view training history

- a. Select the "Reports" icon and click on the Trainees tab
- b. Click the dot next to "History by SSN"
- c. Enter social security number
- d. 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 19HASC 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

Client ID#: istc09

To verify training

- a. Hover over Trainee tab and click search
- b. Type the 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: 845adminMember #: 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

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: scheduling@istc.net

Password: nederland

To register training

- a. Click the Student tab, type the 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.

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

To verify training

- a. Click the Student tab and type the full social security number in the search box and click enter to search. 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

Username: ISTC324 Password: arsc324

To verify training history

- a. Type full social security number AND last name then 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 and 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

- c. Click Continue and Choose Industrial Safety Training Council location
- d. Choose the date and search for course code in the search box provided
- e. Click Select next to the course(s) needed and click continue.
- f. Click Submit

To verify training history

- a. Click Status tab and enter the participant social security number.
- b. 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 and click Virtual Safety Council
- b. Log in to council using above information.
- c. Click blue Register button and click Add Student.

- d. 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.
- e. **IMPORTANT:** You must write the Student's ID number down on their routing slip. This number is required when logging into the TVTC Course Launcher.
- f. Click on the student's name and click the OK button.
- g. 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.
- h. Input Completion date. This will always be the date of training.
- i. Click the box next to each course needed then 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.

26- Tulsa, OK

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”

III. Check-In

A. Forms of 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. Identification Requirements

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. No Site Specific training can 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.*

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

- a. Go to the Participant tab and search for the Participant's social
- b. Click Participant's name and click the Notes button
- c. Click Add and select the Note type
- d. Enter brief description of note in the subject line
- e. Enter any additional information in the body of the note and Save

To add an Entity note

- a. Go to the Entity tab and search for the Entity number
- b. Click the Entity's name and click the Notes button
- c. Click Add and select Note type
- d. Enter brief description of note in the subject line
- e. Enter any additional information in the body of the note and 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.

1. 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.
 2. 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.
 3. 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.
 4. 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.**
 5. 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.
 6. 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.
 7. 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
- b. Search for social
- c. Click on Participant's name
- d. Click history button
- e. Click Transfer Unscheduled button

- f. Enter the date the participant took training
- g. Select appropriate Entity ID
- h. Select appropriate Council
- i. Select appropriate Course Code
- j. Verify training and submit
- k. Add a note into the Participant's profile that states **Participant needs to take 09MARSEC**

To Transfer as a walk- in

- a. Go to the Participant tab
- b. Have the Participant type in their social security number
- c. Click on Participant's name
- d. Click history button
- e. Click Transfer Unscheduled button
- f. Enter the date the participant took training
- g. Select appropriate Entity ID
- h. Select appropriate Council
- i. Select appropriate Course Code
- j. Verify training and submit
- k. 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.

- l. Verify that the trainee has a valid 09MARSEC

Check the participant in for the 09MARSEC using regular procedures

- m. 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.

- c. If a participant's social does not come up in the check in screen:
1. 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.
 2. 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 supervisor approval.

- d. Once the participant shows on the Customer Service list, double click their name.
- e. Verify that the students name, DOB, and gender are 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.

- f. 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.
- g. Verify that the participant has a valid Basic Plus or Basic Refresher if the courses they are scheduled for require it.
- h. Transfer any ARSC Reciprocal training.
- i. Check for any Owner Exemptions
- j. Check for any notes pertaining to the participant or participant's company
- k. 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.
- l. 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.)

m. Update picture if needed.

n. Verify identification and check the "ID Verified" box.

o. Verify TWIC card and check the "TWIC Verified" box if needed for Motiva or Entergy.

p. Click the Check in & Print Slip button.

q. Have the participant verify that all information is correct on the screen by clicking the "I Agree" button.

r. 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.

s. Print the routing slip and send the trainee to the correct training room.

t. 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.

IV. Payments

Payments must be taken immediately after checking-in a student. Routing slips should be brought by the **ISTC EMPLOYEE** to the payment center and not given to participant. If there is a credit card authorization form it MUST be processed as soon as they are done checking in.

If an error occurs when taking a payment, particularly when a receipt is not printed, do NOT keep hitting the print button. Figure out what is causing the problem or contact the IT Department. This is usually caused by duplicate classes in one payment.

ISTC employees are to ALWAYS use their own login credentials to take payments. After processing a transaction, completely log out of the register.

Forms of payment accepted

- **Cash-** all cash is verified using the counterfeit detector pen.
- **Company Checks and Personal Checks-** all checks must have driver's license, date of birth, contact number and current date. *Temporary checks are not accepted.*
- **Money Order**
- **Texas Workforce Commission Voucher**
- **Credit Card-** Credit Card payments can be submitted online using the Credit Card Authorization form or in person using the actual credit card.

When you receive a Credit Card Authorization form for payment of classes:

1. Make sure all information is filled out correctly
2. Stamp the bottom with the Confidential stamp
3. Make 2 copies of the form and paper clip them together
4. Put in the designated Credit Card Authorization folder until the form needs to be used for payment. **SEND ALL CREDIT CARD AUTHORIZATION FORMS THAT ARE SENT FOR INVOICE PAYMENTS TO THE ACCOUNTING DEPARTMENT-DO NOT FILE!**

How to run a credit card payment with card

Follow the appropriate procedure located below for processing a payment as Single/Group/Miscellaneous in the Payment Receipts program. After you have used the Payment Receipts program to find the cost of courses, follow these steps to run a credit card payment using the actual credit card:

- a. Confirm that the name on card matches the individual processing the card
- b. Swipe credit card through credit card machine and press enter button
- c. Enter month/year of expiration of card and press enter button
- d. Enter amount to be charged to credit card and press the enter button
- e. Enter 0.00 for the tax charge if asked and press the enter button
- f. Press the enter button if asked if purchase is tax exempt
- g. Have customer sign the original receipt
- h. Finish out payment in the Payment Receipts program
- i. Write the receipt number from the itemized receipt given by the Payment Receipts program on the top of the original credit card receipt
- j. Give participant the copy of credit card receipt and itemized receipt.
- k. Put original credit card receipt in cash drawer

How to run a credit card payment using a Credit Card Authorization form

Follow the appropriate procedure located below for processing a payment as Single/Group/Miscellaneous in the Payment Receipts program. After you have used the Payment Receipts program to find the cost of courses, follow these steps to run a credit card payment using a Credit Card Authorization form:

- a. Confirm that all information is correctly filled out on form and that the authorized amount on the form is not less than the cost of training.

Note: If authorized amount is less than the cost of training, the company must be contacted immediately and a new Credit Card Authorization form must be sent.

- b. Click SALE on the credit card machine
- c. Type the credit card number into the credit card machine and press the enter button
- d. Enter month/year of expiration of card and press enter button
- e. Enter amount to be charged to credit card and press the enter button
- f. Enter 0.00 for the tax charge if asked and press the enter button
- g. Press the enter button if asked if purchase is tax exempt
- h. Write "Signature on form" in signature space on the credit card receipt
- i. Finish out payment in the Payment Receipts program
- j. Write the receipt number from the itemized receipt given by the Payment Receipts program on the top of the original credit card receipt
- k. Staple original credit card receipt to one copy of the Credit Card Authorization form and place in designated folder to be placed with the end of day deposit.
- l. Staple the copy of the credit card receipt and itemized receipt from the Payment Receipt program to the other copy of the Credit Card Authorization form and black out the credit card number on the form with sharpie and then cover with white out.
- m. Copy of Credit Card Authorization forms with receipts will be mailed/emailed/faxed (preference noted on the form) to the company at the end of the day.

If a credit card is declined:

- Call the company to inform them that the card was declined and request another form of payment. ISTC employee must keep the routing slip until payment is received.

Single person payment

- a. Open the Payment Receipts program and log in
- b. Click on the SINGLE PERSON button.
- c. Click ADD next to the social security number of the participant.

Note: The participant selected should appear in the Invoiced Participants column. Verify that the classes shown in the column match the participant's routing slip.

- d. Select Cash, Check, or Credit Card as payment type.
 - If the student pays with a check, enter the check number
 - If the student pays with a credit card, select the type of credit card.
- e. Type in the amount received and click the enter key to view the amount of change to give.
- f. Click the print button to print the receipt.
 - Write the receipt number and your initials on top of the credit card tape or the check.
 - Stamp the back of all checks with the Deposit Only stamp.
- g. Place all checks and credit card receipts in the cash drawer or attach to Credit Card Authorization form.
- h. Write your initials over the COD on the routing slip to complete the transaction.

Group Payment

- a. Collect all routing slips for each participant.
- b. Open Payment Receipts program and log in
- c. Click on the GROUP PAY button.
- d. Select the Add button beside each participant's social security number included in the group payment.

Note: All participants selected should appear in the Invoiced Participants column. Verify that the classes shown in the column match each participant's routing slip. Initial the top of each routing slip of the participant's selected.

- e. Select Cash, Check, or Credit Card as payment type.
 - If the student pays with a check, enter the check number
 - If the student pays with a credit card, select the type of credit card.
- f. Type in the amount received and click the enter key to view the amount of change to give.
- g. Click the print button to print the receipt.
 - Write the receipt number and your initials on top of the credit card tape or the check.
 - Stamp the back of all checks with the Deposit Only stamp.
- h. Place all checks and credit card receipts in the cash drawer or attach to Credit Card Authorization form.
- i. Write your initials over the COD on the routing slip to complete the transaction.

Miscellaneous Payment

Miscellaneous payments should be used for any of the following:

- A. Subscriber payments: full or pro-rated amounts
- B. All refund transactions
- C. Invoice Payments
- D. Payments Using Account Credits
- E. Cashing employee personal checks
- F. Check is more than classes being taken
- G. Payments using 2 different forms of payment

A. Subscriber Payment –Full Payment/Prorated Amounts

- a. Open Payment Receipt program and log in
- b. Choose miscellaneous payment
- c. Select **OTHER** and create a detailed note explaining what subscriber type is being paid for and whether it is the full or prorated amount with your initials.
- d. Include the client ID number of the company and click the enter key.
- e. Type **00000000** in the social field and click enter.
- f. Type in the total amount received for the subscriber payment and click the enter key.
 - g. Select Cash, Check, or Credit Card as payment type.
 - If the student pays with a check, enter the check number
 - If the student pays with a credit card, select the type of credit card.
 - h. Click the print button to print the receipt.
 - Write the receipt number and your initials on top of the credit card tape or the check.
 - Stamp the back of all checks with the Deposit Only stamp.
- j. Place cash/check/credit card receipt in the cash drawer or attach receipt to Credit Card Authorization form.

B. Refunds

You must have the original receipt before you can process a return transaction. When refunding a class **DO NOT** refund the social security verification fee. This fee is NON-REFUNDABLE.

- a. Open Payment Receipt program and log in
- b. Choose miscellaneous payment
- c. Select **OTHER**
- d. In the note field, provide the original receipt number and an explanation for the refund with your initials.

Note: Provide the original receipt payment type and the amount that is refunded.

- e. Type the Participant's social security number in the SSN field and click enter.
- f. Enter 0 for the amount taken
- g. Select the same payment transaction field that was used with the original receipt.
 - If a participant paid with a credit card you will have to refund the amount back to the SAME card.
 - If you do not have the Credit Card or Credit Card Authorization form, a refund will be given in the form of a credit by accounting. A note will need to be made in Miscellaneous to let Accounting know of the need for a credit on an account.
 - If classes were paid with cash, a refund will be given back as cash.
 - If classes were paid with a check, a refund will be given in the form of a credit by accounting. A note will need to be made in Miscellaneous to let Accounting know of the need for a credit on an account. **Cash back will not be given from payment with a check.**
- h. Attach original receipt and refund receipt together and include them with the end of the day deposit.
- i. Click the print button to print the receipt.
 - Write the receipt number and your initials on top of the credit card tape or the check.
- j. Remove amount of refund in cash from drawer or place all credit card receipts in the cash drawer or attach to Credit Card Authorization form.

Always issue customers a copy of the receipt. NEVER give out original receipts.

C. Invoice Payments

All invoice payments must be approved by a member of the Accounting Department before processing.

- a. Open Payment Receipt program and log in
- b. Choose miscellaneous payment
- c. Select **OTHER** and create a detailed note explaining which invoices are to be paid for, the initials of the Accounting representative that approved the payment, and your initials.
- d. Include the client ID number of the company and click the enter key.
- e. Type **00000000** in the social field and click enter.
- f. Type in the total amount received for the invoice payment and click the enter key.
- g. Select Cash, Check, or Credit Card as payment type.

If it is a check, enter the check number

If it is a credit card, select the type of credit card.

- h. Click the print button to print the receipt.
- i. Write the receipt number and your initials on top of the credit card tape or the check.
- j. Stamp the back of all checks with the Deposit Only stamp.
- k. Place cash/check/credit card receipt in the cash drawer or attach receipt to Credit Card Authorization form.

D. Payments Using Account Credits

Call accounting department to confirm that the credit is still valid and get the reference number for the account credit.

- a. Open Payment Receipt program and log in
- b. Choose miscellaneous payment
- c. Select **OTHER** and create a detailed note with the credit reference number is being used, the initials of the Accounting representative that approved the credit, and your initials.

- d. Include the client ID number of the company and click the enter key.
 - e. Type the Participant's social security number in the social field and click enter.
 - f. Type in the total amount received for the payment and click the enter key.
- Note: If the credit will cover the full amount of training, put 0 as the amount received.**
- g. Select Cash, Check, or Credit Card as payment type.
- Note: If the credit will cover the full amount of training, choose cash as the payment type.**
- If it is a check, enter the check number
 - If it is a credit card, select the type of credit card.
- h. Click the print button to print the receipt.
 - Write the receipt number and your initials on top of the credit card tape or the check.
 - Stamp the back of all checks with the Deposit Only stamp.
- i. Place cash/check/credit card receipt in the cash drawer or attach receipt to Credit Card Authorization form.

E. Cashing employee personal checks

Personal checks can be cashed for ISTC EMPLOYEES ONLY.

- a. Open Payment Receipt program and log in
- b. Choose miscellaneous payment
- c. Select **OTHER** and create a detailed note stating that you are cashing a check for (**amount**) for (**name of employee**)
- d. Type the 52434 Walk-in client number and click the enter key.
- e. Type the Participant's social security number in the social field and click the enter.
- f. Type in 0 as the total amount received for the payment and click the enter key.
- g. Select Check as payment type and click the print button to print the receipt.
 - Write the receipt number and your initials on top of the check.
 - Stamp the back of check with the Deposit Only stamp.
- j. Place check in the cash drawer.
- k. Give employee cash value of the check.

F. Company check is more than classes being taken

- a. Open Payment Receipt program and log in
- b. Choose miscellaneous payment
- c. Select **OTHER** and create a detailed note with the class code, total amount of courses, total amount to be applied to credit and your initials.
- d. Include the client ID number of the company and click the enter key.
- e. Type the Participant's social security number in the social field and click enter.
- f. Type in the total amount received for the payment and click the enter key.
- g. Select Check as payment type and enter the check number
- h. Click the print button to print the receipt.
 - Write the receipt number and your initials on top of the check.
 - Stamp the back of all checks with the Deposit Only stamp.
- i. Place check in the cash drawer

G. Company paying using two different types of payment

- a. Open Payment Receipt program and log in
- b. Choose miscellaneous payment

- c. Select **OTHER** and create a detailed note with the class code, total amount that will be taken with this form of payment and that the remainder will be paid with a different form of payment, and your initials.
- d. Include the client ID number of the company and click the enter key.
- e. Type the Participant's social security number in the social field and click enter.
- f. Type in the total amount received for the payment and click the enter key.
- g. Select Check as payment type and enter the check number.
- h. Click the print button to print the receipt.
- i. Write the receipt number and your initials on top of the check or credit card receipt.
- j. Stamp the back of all checks with the Deposit Only stamp.
- k. Choose miscellaneous payment
- l. Select **OTHER** and create a detailed note with the class code, total amount that will be taken with this form of payment, the receipt number from the first form of payment, and your initials.
- m. Include the client ID number of the company and click the enter key.
- n. Type the Participant's social security number in the social field and click enter.
- o. Type in the total amount received for the payment and click the enter key.
- p. Select Check as payment type and enter the check number
- q. Click the print button to print the receipt and write the receipt number and your initials on top of the check.
- r. Stamp the back of all checks with the Deposit Only stamp.
- s. Place cash/check/credit card receipt in the cash drawer or attach receipt to Credit Card Authorization form.

V. Check-Out(Badge Pick-Up)

- | | | | |
|----------|---------------------------|----------|--------------------------------|
| A | General Guidelines | D | Manually Scoring Course |
| B | Types of Badges | E | Checkout Procedures |
| C | Web based Courses | F | Failed Classes |

A. General Guidelines

All participants should present a routing slip to the check-out employee before they are issued a badge at the check-out station. Routing slips are alphabetized by last name, stapled together by letter, and stored in an envelope daily. That envelope is sent to accounting at the end of the month and boxed for storage with a 3 month minimum of storage.

Badges print automatically when the participant is done with training for many courses that we offer, however, there are many badges that will not print automatically.

A badge will not print automatically when:

- **No social security verification or background check has been ordered on the participant.**

Attempt to transfer a 09SSV from the Participant's training history in Primus. If no 09SSV is found, you will have to schedule one for the Participant under their company's Entity ID number. If a PO # was used for the training taken, use the same PO# when ordering the 09SSV. If training taken was COD, the 09SSV must be marked COD and paid for before issuing a badge.

- **The social security verification is not complete or a Background check is in error status.**
Contact the Background Department

- **The participant has an owner exception/waiver in their history.**

Have an approved employee print a special badge.

- **If the participant has two core programs (09BN and 090ST) in their valid training history**

Have an approved employee print a special badge.

- **Participant has taken a web based course offered by another safety council**

View the Participant's training history in the course's originating safety council's web site and PASS/FAIL the course in ATLAS.

- **Badge printer has run out of badges or print ribbon.**

Replace badges or print ribbon and press ok on printer.

- **Participant did not complete linked courses.** Have the participant complete the prerequisite courses or rescheduled.

If any of the above issues do not contribute to the reason a badge was not printed:

Check within the Audit Trail program saved in your web browser's bookmarks for notation as to why no badge was printed and contact the appropriate department to have the issue resolved.

The Audit Trail program should always be consulted before contacting the Customer Service Supervisor or appropriate department.

B. Types of Badges

It is the responsibility of the CUSTOMER SERVICE REPRESENTATIVE working in badge pickup to verify that the participant should be receiving the badge that has printed. Color, Photo, and Course Codes should be checked on every badge before giving to the recipient to verify that all information is correct. All badges issued **MUST** have a clear recognizable picture of the participant. If the Participant's appearance has changed (length/color of hair, glasses, weight) a new picture should be taken.

1. ARSC Reciprocal Badge **WHITE**

ARSC Reciprocal badges are issued in compliance with the current ISTC procedures and the "ARSC Common Guidelines". All ARSC Reciprocal badges are white and **MUST** have a current Basic Plus or Basic Plus Refresher from ISTC or another ARSC Reciprocal Safety Council on the front of the badge.

2. Non-Reciprocal Badge **YELLOW**

No valid Basic Plus or Basic Plus Refresher. When a Basic Plus or Basic Plus Refresher class is not valid or not required, the badge will automatically print as a yellow badge. This indicates that a valid Basic Plus or Basic Plus Refresher is not in the Participant's training history or that the participant has taken a coached class. A yellow badge should not be released with any Site Specific codes that require Basic Plus or Basic Plus Refresher unless an Owner Exception has been issued.

3. Spanish Badge **YELLOW**

Spanish classes are not ARSC Reciprocal; therefore they are printed on a yellow badge. Site Specific courses taken in Spanish should **NEVER** be combined on a badge with English classes unless an Owner Exception is provided.

4. Owner Exception Badge

These can be issued in a variety of colors depending on the waiver. Owner Exceptions are specific requirements that have been waived or modified by an Owner Site Facility for a period of time. A member of the Site's Safety Department or approved personnel will indicate what the exception is

for and how long the badge will be active. If an Owner Site Facility has waived the identification requirements for a participant the badge will ALWAYS be yellow. **The site specific course for the Owner Site Facility that has issued the exception is the only course to be put on the badge along with any Non-Reciprocal version of ARSC courses that the participant has taken.** Identification waivers are NOT issued for participants taking ONLY an ARSC Reciprocal course. Please see Non-Reciprocal scheduling procedures for this process.

5. Temporary Badge BLUE

Blue badges are issued for Site Specific courses that allow a background check to be ordered but not graded before gaining entry to the site. A noticeable expiration date will be printed on the bottom of the front of the badge. Once the badge is expired the participant cannot be issued a second badge without permission from the Background Department. It is mandatory for the participant to turn in their blue badge in order to pick up a permanent badge for free. When issuing a temporary badge, the participant should be informed that the purpose of the temporary badge is due to their background check not being complete. Always inform them that their company will notify them when the background screen is complete and when they are eligible to pick up their permanent badge. Employees should never provide information concerning a background screen to participants over the phone. Participants with questions concerning their background screen results should be directed to contact their company. If a Participant's temporary badge has expired and his background check is still pending, call the Background Department; **do not turn the participant away.** The Background Department will determine if the participant can be issued another temporary card.

6. Office Safety GREEN

Green badges are issued to participants who have taken the Office Safety course. These badges should only have the Office Safety course code and the Site Specific course code that has approved the participant to use the office safety course as a core class instead of a Basic Plus or Basic Plus Refresher. This class taken alone is available for any participant to take.

C. Web Based Courses

ISTC allows participants to take courses offered by other safety councils and receive the codes for these courses on an ISTC badge upon completion. All web based training scores must be verified using the host safety council's website before changing a course status in Check-Out. If a score cannot be confirmed, please contact the course's host safety council for further instruction.

D. How to manually score a course during Check-Out

ISTC offers courses that do not score automatically at the end of the test. The employee at checkout will be in charge of scoring these courses manually. **NEVER** manually score a course without verifying that the course has been passed or failed.

- a. Click on the course in question to highlight it and click the Change Status button.
- b. Choose the new course status
 - Pass/ Fail
 - No-show
 - Incomplete
- c. Click the Change Status button

D. Check-Out Procedures

- a.** Log into ATLAS and go to the Customer Service tab.
- b.** Scan the routing slip or type in the last six digits of the Participant's social located on the routing slip. If the participant does not have a routing slip, have them type in their full social security number.
- c.** Once the participant shows on the Customer Service list, double click their name.
- d.** Claim the case
- e.** Check all notes and adhere to them
- f.** Verify that all courses on the screen are on the routing slip
- g.** Verify that all courses have been scored (PASS/FAIL/NOSHOW)
 - Manually score any web based courses at this time. Always verify scores in the originating safety council's website.
 - If courses are not scored but participant said they took the course, use the CBT Score viewer to confirm. If a course score cannot be confirmed contact the IT Department to see if a bookmark was created for the program. If no bookmark was created, the course has not yet been taken. If it is possible that the participant took the course but the score did not record, contact the Customer Service Supervisor for procedures.

Verify that all courses have been paid for if COD

- DO NOT mark the COD as paid if a payment has not been made. The only exception to this is if a payment has been taken in Miscellaneous using the Payment Receipts program. If this is the case, verify the payment before marking paid.
- If the participant chooses not to finish training for courses that are COD, no-show the courses that they do not want to take and then refer back to the Refund Procedures. **ALL COD COURSES THAT ARE NOT TAKEN ON THE DAY OF PAYMENT MUST BE REFUNDED!**
- If a participant has COD courses and leaves ISTC with unfinished training, the courses not taken need to be no-showed and a note informing accounting of the refund needed must be placed in the Payment Receipts program.

h. Verify that courses taken are on the badge and that all previous courses taken meet all course requirements.

i. If a participant has taken any of the following classes issue a handout for the course:

- If the participant has taken an ISTC Basic Plus or Basic Plus Refresher course they should receive an ISTC sticker.
- Motiva site specific 09ST- Motiva Lifesaving rules card
- Flint Hills On boarding 09FHR-OB- Handbook and rules card
- TOTAL site specific 09FI- Total Safety Handbook with sticker & Golden Rules Handbook
- Bayer Polymers Baytown 09BYB/BYBU -Bayer Baytown Chemical List
- Exxon Mobil Baytown Olefins Permit Recipient 09EMBOPR- round green sticker with the month and year of expiration hole punched.
- ExxonMobil Baytown Olefins Confined Space Entrant 09EMBOPE- round yellow sticker with the month and year of expiration hole punched.
- OCI site specific 09OCI- OCI Lifesaving rules card
- Valero Meraux 08VALMX/08VMALKY- White safety booklet
- 09ET- Energy Transfer sticker and Business card

- BASFPA Safe Start Card

j. Click the Check-out button and give the Participant their badge

k. If the courses have to be manually scored, click Check-out & Print Badge button and have the participant step to the side and wait for the badge to print.

l. File the routing slip

VERIFY that all no-showed or failed courses do not appear on the badge. If a participant fails a course that is still current on their badge, the failed score overrides the non-expired course. **YOU MUST REMOVE** failed courses from the badge by special printing if a participant has failed a course but the previous course taken is still showing on the badge.

E. Fail Tests

If a participant fails a course, have them finish all other courses they are scheduled for unless the failed course was a pre-requisite. If no other courses are needed, or if the participant cannot continue until passing the failed course, check them out using the procedures above and have them call their company to get rescheduled. A course cannot be rescheduled by an ISTC employee without receiving approval from the Participant's company or permission from the Customer Service Supervisor.

If a participant fails Basic Plus or Basic Plus Refresher, they **MUST** take the complete BASIC PLUS class before receiving a badge or taking further training.

VI. Closing Customer Service

If a student arrives prior to the last scheduled course time for the day and the company is willing to schedule the participant they will be allowed to take the training. If a participant has been checked in for training they will be allowed to finish all training for the day unless management approves otherwise. You are not authorized to remove a participant from class because you think that they will not be finished in time. Only Management can override this procedure.

End of the day deposits should BEGIN being processed at least fifteen minutes prior to the end of the business day. This alleviates corrections or amendments due to invoicing, lost badges, and retests that are needed.

File all credit card authorization forms and routing slips for the day in the locked cabinet.

Mail/Email/Fax all Credit Card Authorization form receipts

Refill all supplies- fax machine paper, printer paper, badge print ribbon, badge stock, badge clips, etc.

Deposit

The Nederland office will follow all procedures below in regards to the deposit.

The Baytown office will follow the procedures to complete the deposit and the original deposit slip, cash, and checks are then given to supervisor to be placed in locked cabinet or delivered to bank.

The completed daily cash drawer report with all associated paperwork is filed in a locked cabinet until the next business day. The morning of the next business day an email with the previous day's daily cash drawer report is to be emailed to the Accounting Department. The daily cash drawer report with all associated paperwork is then placed back into the locked cabinet until Friday. All original documents will be delivered to the Accounting Department weekly.

- a. Verify that copies of credit card receipts and checks have been made. *Do not make copies of ISTC employee's personal checks.*
- b. Click the "Reports" tab in ATLAS and select "Receipts by payment type report" on the left.
- c. Make sure the dates are correct and choose location.
- d. Click "Export to PDF"
- e. Click the downloaded PDF icon at the bottom left of the screen to open the PDF file
- f. Print the Report
- g. Open your cash drawer via the Receipts program in the Miscellaneous tab by choosing the "Open cash drawer" option and typing in "counting cash for deposit", choosing 'cash', putting your amount as \$0, and clicking 'print'.
- h. Look on your report from instruction **H** and see how much money you have in cash. Remove that EXACT amount and put it in an envelope.
 - If you have a personal check, subtract the amount from cash on your Receipts by payment type sheet and add it to the checks section.
 - Look for refunds. If there are refunds, highlight the note and then subtract the refunded amount from the cash total.
- i. Count the rest of the cash in the drawer and make sure it is \$200.
 - If it is not \$200, take money out of the deposit envelope and put it in the drawer to make it \$200.
- j. Remove 1 deposit slip from the booklet and write the cash amount in the 'Currency' section.
- k. Look on your report from instruction **H** and see how much money you have in checks. Make sure it adds up to the amount of checks you have.
 - If you have a personal check, add the amount of the check to the total check amount.
- l. Write in checks on the deposit slip. Write the check number in the numbered spots and write the check amount in the corresponding space. Make sure you include personal checks.
- m. Write the total amount of all cash and checks at the bottom and on the left side of the slip in the appropriate spot.
- n. Make a copy of the deposit slip. If there is a personal check, copy it along with the deposit slip.
- o. Look on your report from instruction **H** and see how much money you have in credit cards. Make sure your receipts and that amount add up.
- p. Compare the report from instruction **H** and the receipt report from the credit card machine and make sure the totals add up.
- q. Add up the Cash, Check, and Credit Card totals. Make sure that it matches the total you have on the report from instruction **H**.
 - If you had to subtract a refund from cash, you will subtract that amount from this total as well.
- r. Fill out your 'Daily Cash Drawer Report'
- s. Put everything together in the following order:
 1. Envelope with cash, checks, and credit cards, and cc machine printout
 2. Daily Cash Drawer Report
 3. Deposit slip copy
 4. Report from computer
 5. Original Credit Card Authorizations

6. Copies of Credit Card Authorizations

- t. Write \$200 PM in the black log book kept in the Customer Service area and initial
- u. Place finished deposit in designated locked cabinet

If the deposit is over/under the totals listed on the Receipts Report, all receipts will be checked again. If fund does not balance a second employee must try to balance. All resources should be verified prior to leaving an unbalanced transaction. If the issue cannot be found, it will be indicated on the Daily Cash Drawer Report.

If a daily deposit cannot be balanced, a written account of the issue along with a copy of the Daily Cash Drawer Report and Receipts by Payment Type report must be emailed to the Vice President of Operations, Accounting Department, CFO, and CEO. This written report must include the name of the two customer service representative who verified balancing the drawer and the amount of shortage/overage. The report should be submitted before leaving for the day

After all participants have left the building

Verify with CBT Lab personnel that all participants have completed training. If you have participants left in check-out with a Checked-in status, no-show the courses not taken and check them out. If a participant left in check-out is COD and has not finished all courses, no-show the courses not taken and refund the payment for the courses not taken if the original payment was on a Credit Card Authorization form. If any other form of payment was used, create a credit note in the Payment Receipts program for Accounting.

- a. All remaining participants should be no-showed at the end of the business day using the following procedures:
 - 1. Log into In ATLAS and select Customer Service.
 - 2. Make sure all participants that are listed as Checked In or Check Out are checked out.
 - 3. Click the No Show button and enter the date
 - 4. Choose the location and click No show
- b. File all routing slips in a folder and place in designated filing cabinet.

To close the building

The closing employee from customer service and CBT lab will leave together from the building.

- a. Check front and back doors to the customer service area confirming that they are locked and secured.

VII. Other Procedures

Mail Instructions

Separate personal mail, checks, and invoices into different piles

Personal Mail

- a. Date stamp all personal mail
- b. Open personal mail only if addressed to individual as INDUSTRIAL SAFETY TRAINING COUNCIL/ISTC
- c. Put personal mail into appropriate folder

CEO

- Date stamp and open mail if it is addressed to him with INDUSTRIAL SAFETY TRAINING COUNCIL/ISTC
- Date stamp, DO NOT OPEN, Industry of Southeast Texas checks and mail
- Date stamp and label J.J. Keller's Monthly Report (Give Poster to Mr. Murphy)
- Give UNITED HEALTHCARE bills addressed to Chris to Jamikia with invoices
- Date stamp and label Manager's Legal Bulletin
- Date stamp and label business related magazines (NOT catalogs)

HR

- Date stamp and open mail if it is addressed to her with INDUSTRIAL SAFETY TRAINING COUNCIL/ISTC
- Date stamp, DO NOT OPEN, mail addressed to Associated Safety Councils
- Give ADP bills addressed to Patty to Jamikia with invoices
- Give safety council bills addressed to Patty to Jamikia with invoices
- Joe Clark's mail: Date stamp and open mail only if it is addressed to him as ISTC

Vickey

- Date stamp, DO NOT OPEN, and give Golden Triangle Business Roundtable/Burt Black's mail
- Date stamp, DO NOT OPEN, and give Leadership of Southeast Texas/Sandra Arnold's mail

John Durkay

- Date stamp and open mail if it is addressed to him with INDUSTRIAL SAFETY TRAINING COUNCIL/ISTC
- Date stamp, DO NOT OPEN, and give all mail for Taylor Landing

Andrea

- Date stamp and remove from envelope all information regarding client accounts (name change, address change, etc.)

Boyd

- Date stamp, DO NOT OPEN, mail addressed to Southeast Texas Plant Manager's Forum (STPMF)
- Date stamp, DO NOT OPEN, Bank/CC statements (TX State Bank, AmEx, Capital One, etc.)

Checks

- MAKE SURE ALL CHECKS ARE MADE PAYABLE TO ISTC NEDERLAND, BAYTOWN, OR BEST COMPLEX.
- Open checks and separate by size
- REMOVE ALL STAPLES and paperclip all additional information behind the check
- Paperclip loose checks to a blank piece of paper and date stamp paper
- Date stamp in a CLEAR area attached to the check. DO NOT STAMP over any information.
- Add and itemize all checks TWO TIMES (Totals must match)
- Initial and Date next to item number on both papers
- Paperclip all checks together with totals on top
- Put in accounting folder

Invoices:

Open invoices, remove from envelope, and paperclip all information from envelope together Date stamp and put in accounting folder.