SAFETYSYNC

2016

Part I : Introduction to System Tools

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Contents

Thank you for choosing SafetySync, The leading online Occupational Health & Safety Management System. This guide will walk you through the digital tools for implementing your company health and Safety program into an Online Safety Management System. A SafetySync support agent is available toll free, [insert operating hours] at 1.866.668.6402. With full utilization of our program, and full implementation of your company Health and Safety program, SafetySync can help you stand out in the industry.

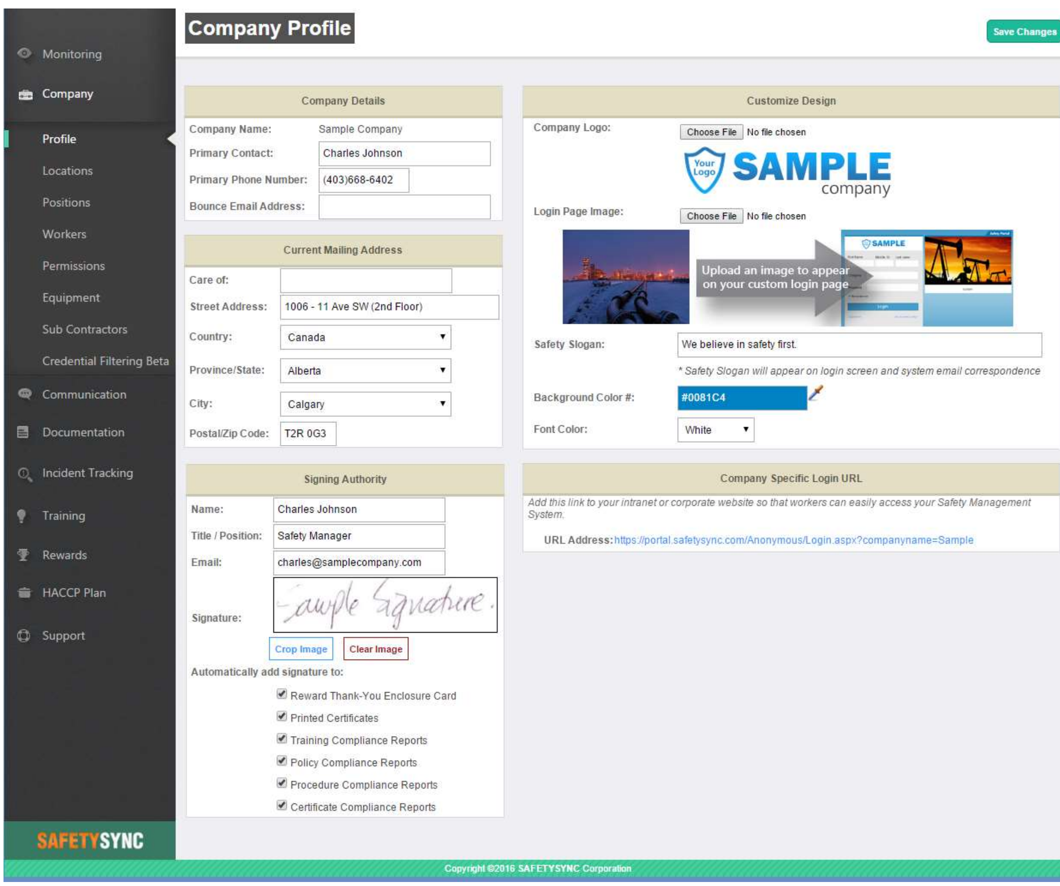
Note: Throughout this guide, text in BLUE with >>> will identify a set of steps to take in order to navigate your page according to the steps described.

<u>Step 8: Components</u> reviews content to be selected once steps 1 – 7 are clearly understood. The Components Criteria is critical to review before continuing on to 'Part II).

Part I : Introduction to System Tools

Step 1: Your Company Profile

The following information will help you set up your company profile in the online system. To get to this page, Navigate to Admin > Company > Profile after successful Login. This page is not accessible by employees who do not have Administrative permissions assigned.



S.No.1

Using this page, we customize your account to reflect your company branding – using logos, safety slogans, etc. See the list below of the functions of this page and, where relevant, a brief description of the benefits these fields provide. Ref. S.No.1.

Company Details

- Company Name : ‘Sample Company’
    - This is a non-editable field that was determined when you created your account. The ‘Company Name’ field is what you enter in on the Login screen in order to access your company account.
- Primary Contact / #
- Bounce Email Address : When the system uses email features that become disabled (Example: Automated sending of a compliance report to an employee) these emails will be forwarded to the ‘Bounce Email’ indicated in this field to ensure no data is lost.

Current Mailing Address

- Completing these 6 fields will add your company Location information to printed certificates and other automated fields.

Signing Authority

- Name / Title / Email / Signature : It is recommended that you input the information and signature of your company president in this section. The Box beneath identifies items which you can attach that signature to, if selected or ‘checked’. ‘Automatically add signature to’:
    - Reward Thank-You Enclosure Card : Only applicable if you have chosen to participate in SafetySync's Rewards Program.
    - Printed Certificates : For example, when staff complete our WHMIS 2015 Course it will appear with the company logo and management signature displayed on the Wallet Card & Certificate of completion.
    - Training Compliance Reports
    - Policy Compliance Reports
    - Procedure Compliance Reports
    - Certificate Compliance Reports

*Adding the signature in this area also provides the opportunity to attach the signature to Policies as they are uploaded as text/open format.

Customize Design

- Company Logo : This image will appear on open format policies, on your login page, on printed certificates and branded all throughout your online system. Please be sure to upload a clear image file in this field.
- Login Page Image : This is the image that appears on the side of the ‘Login Page’
- Safety Slogan : Upload a short and striking or memorable phrase used in advertising. A company motto. (Optional)
- Background Color/Font Color : Modifies the way text is displayed to the user.

Company Specific Login URL

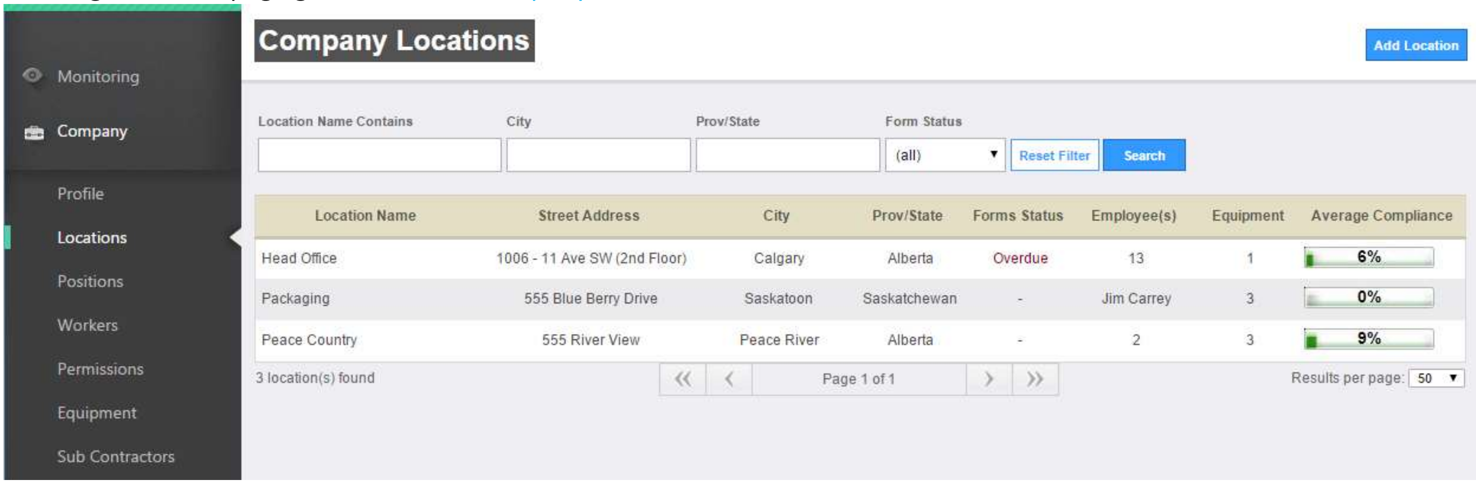
Add this link to your intranet or corporate website so that workers can easily access your Safety Management System.

You may also ★Bookmark/Favorite this link for ease of access during future logins.

Before navigating away from pages you are working in or modifying, remember to ‘Save Changes’ so that none of your information is lost.

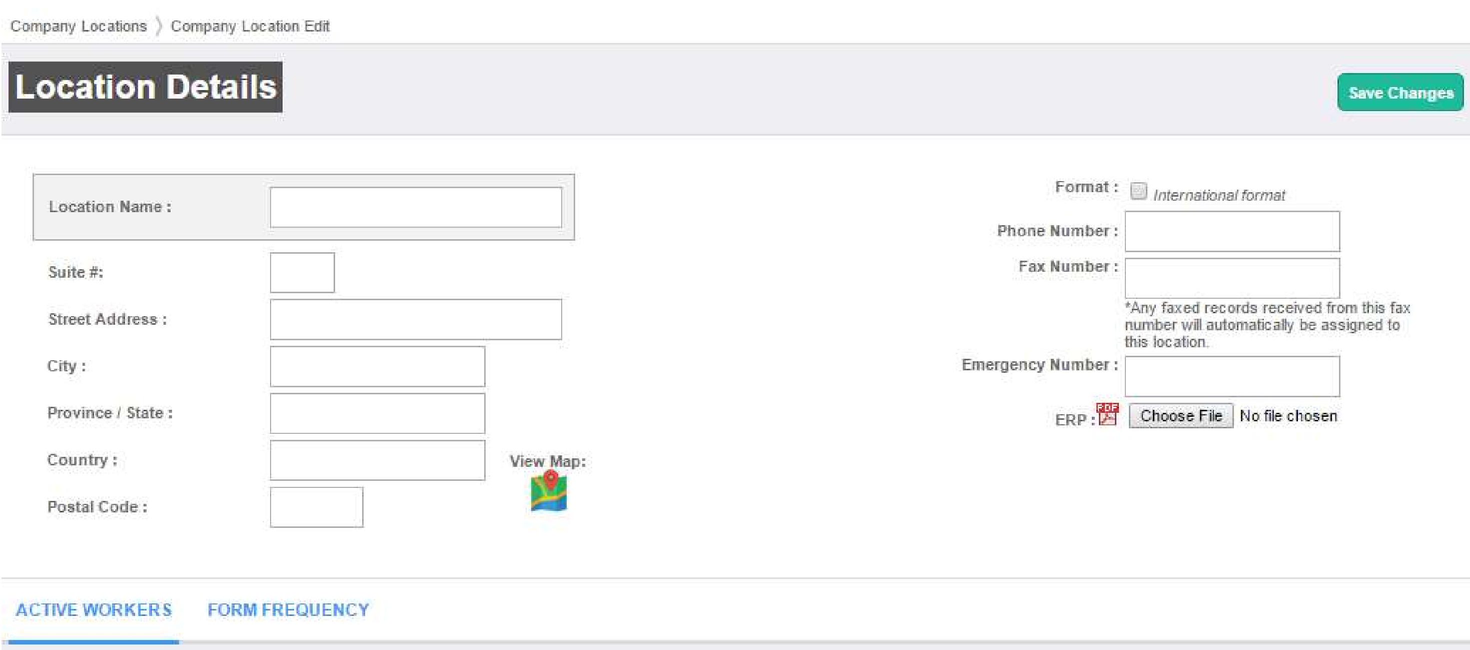
Step 2: Company Locations

To Navigate to this page go to: Admin > Company > Locations .



S.No.2

Next, choose 'Add Location' which will bring you to a page that looks like the image below (S.No.3):



S.No.3

Complete as much information on this page as possible for each individual location/shop/office/field as needed. When entering in your location(s), consider the types of equipment, records and employees you have at those locations.

- The 'Emergency Number' field refers to an emergency number for that specific location.
- The 'ERP' is a great PDF to upload for specific locations using the 'Choose File' option and selecting the PDF Emergency Response file from your computer.

Before navigating away from pages you are working in or modifying, remember to 'Save Changes' so that none of your information is lost. You can go back to** Admin > Company > Locations **to continue to add to the locations list.

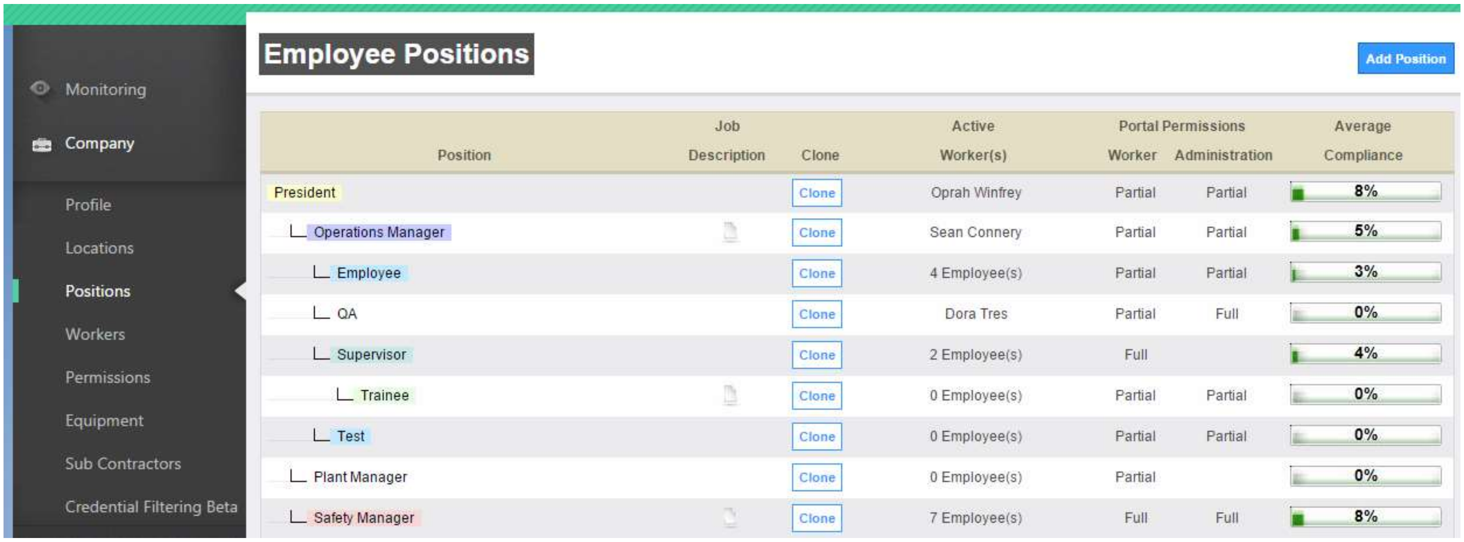
Step 3: Organizational Chart

Since personnel are one of the greatest assets to a company, it only makes sense that the Organizational Chart act as a building block in the foundation of your Online Safety Management System – SafetySync.

Note that many company org charts/reporting structures are written in a horizontal fashion. Utilizing our 'Positions' tool, you will be required to input the reporting structure in a vertical format which will be explained later in this step.

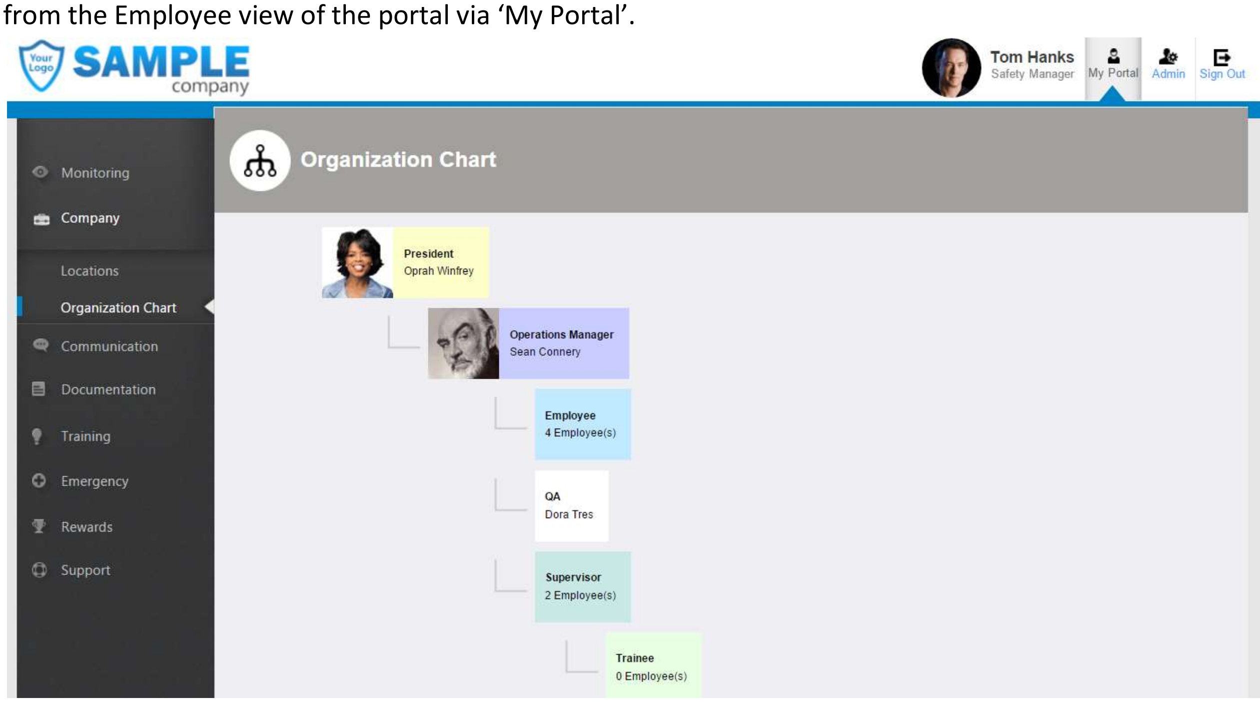
Please see two examples outlining the Organizational chart and how it will look once implemented.

This image (S.No.4) demonstrates what a populated Org Chart Looks like from the administrative view, once all the positions have been entered, color coded and assigned in a reporting structure.



S.No.4

This image (S.No.5) demonstrates what the finished product of your organizational chart looks like once implemented, from the Employee view of the portal via 'My Portal'.



S.No.5

Once navigating to Admin > Company > Positions, choose 'Add Position'.

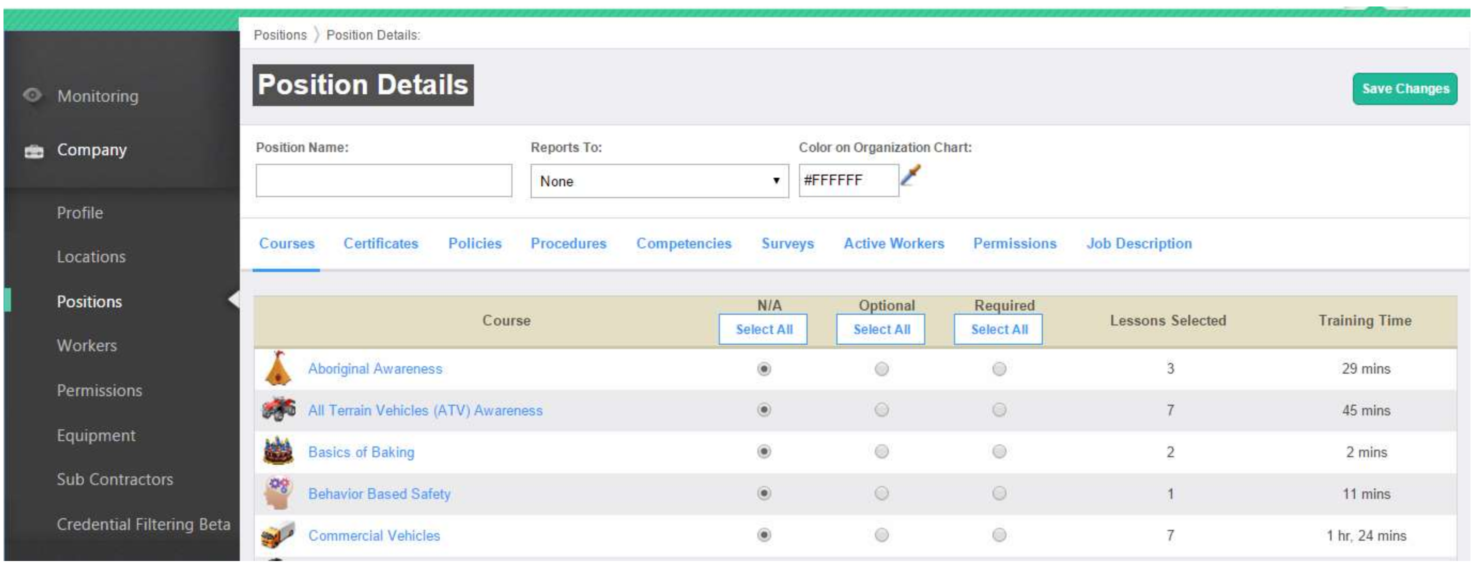
Ideally, when entering your Organizational Chart, you want to work from the Top – Down.

For example, you may want to begin with your most senior position – President. In this working example we would add 'President' to the 'Position Name' field.

Since the president is the most senior position, he does not report to anybody, so we would leave the second field as 'None'. You can choose to color code the job title if you like by choosing the eye-dropper on the 'Color on Organization Chart' field.

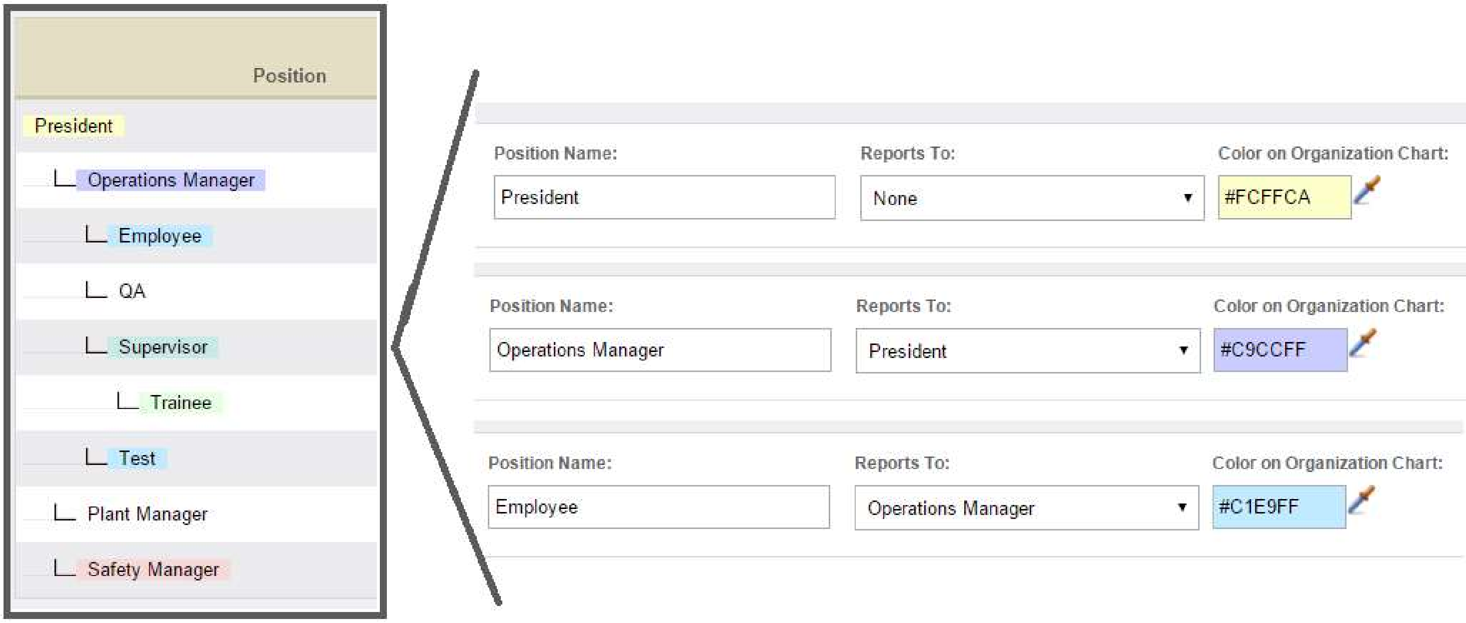
Save Changes

We will return to this page in **Part II : Assigning criteria post-setup** to demonstrate how to utilize the fields indicated in blue, which include: Courses, Certificates, Procedures, Active Workers and much more!



S.No.6

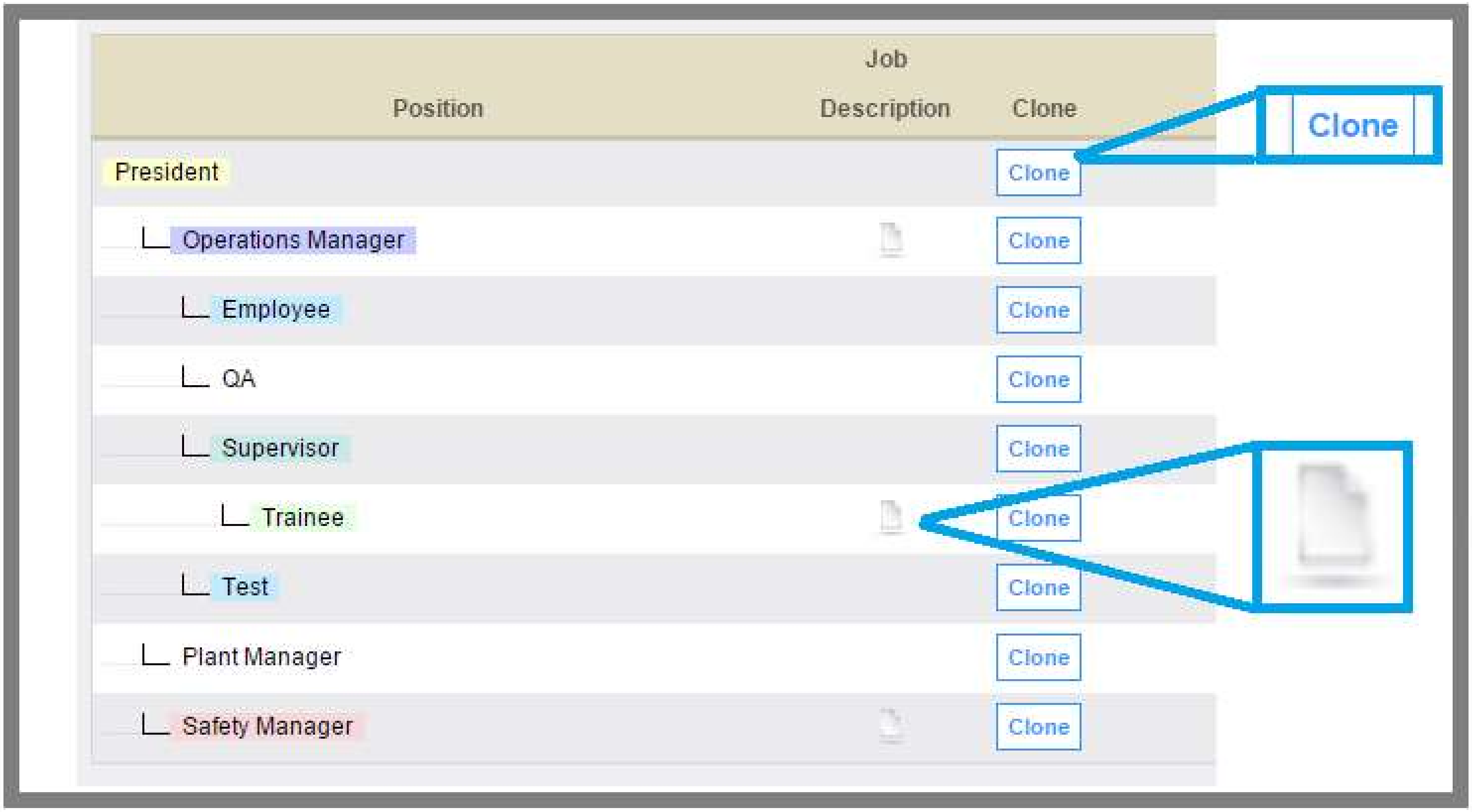
- Once your most senior position exists, the rest are relatively easy to build on. The most important thing to keep in mind is that every new position you input after the initial, must report to another position in order for the org chart to display as you like. S.No.7 Example.



S.No.7

‘Clone’ Feature: There is a feature in the system where you can Clone a position simply by choosing the ‘Clone’ button. This will prompt you to provide a name for the new position. The **clone** feature allows you to create a copy of **all** of the requirements already assigned for an existing specific position. This means, all personnel for the pre-existing position as well as the cloned position will be required to review the identical policies, procedures and complete identical training courses/submit certificates. This is a great tool if multiple positions have the same requirements!

Please reference image S.No.32



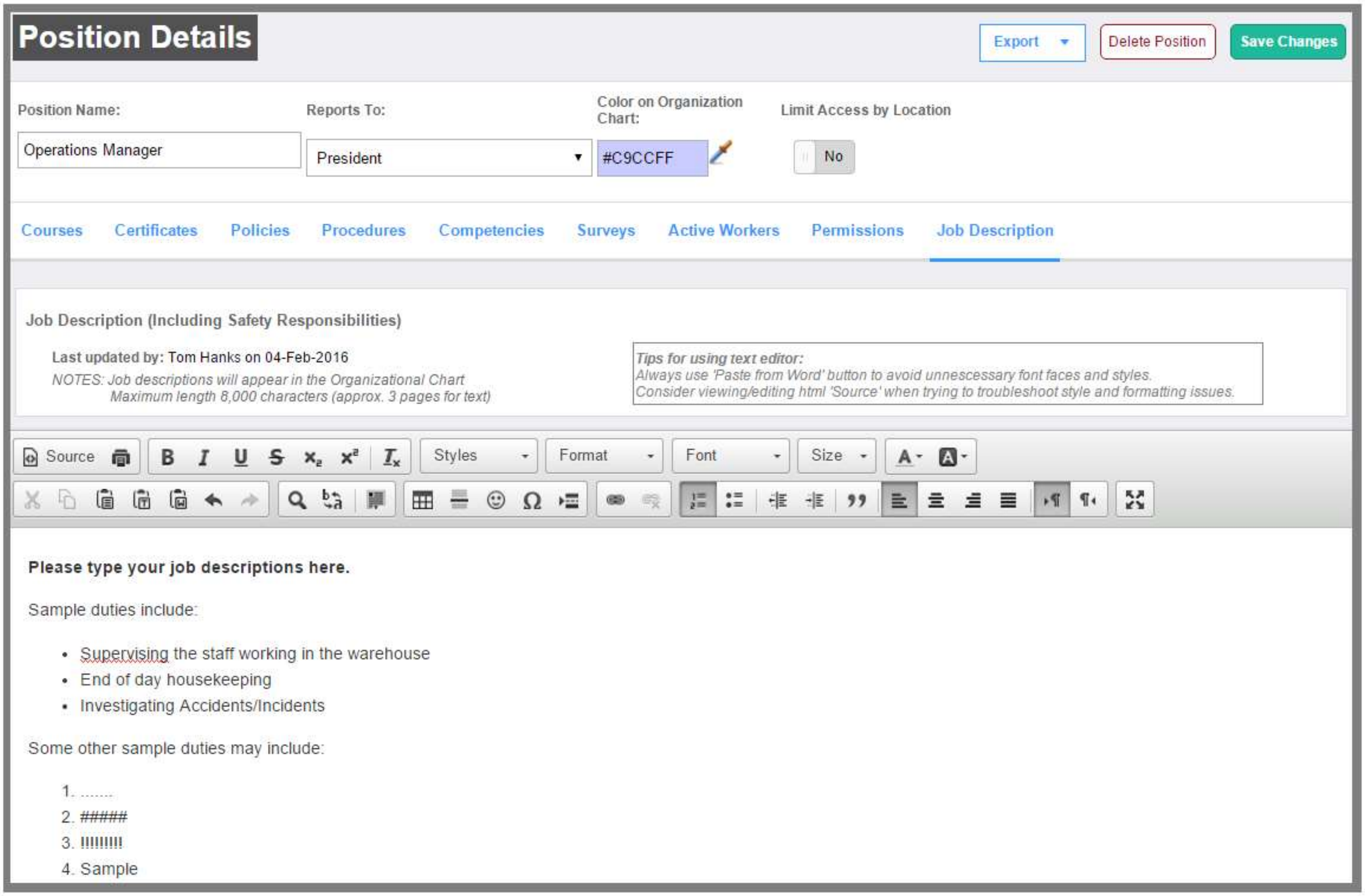
S.No.32

Job Descriptions

Additionally, the small 'Paper' image appears beside positions that have had job descriptions added to it. If you hover over this image (2nd image outlined in Diagram S.No.32), the content entered will appear.

To Enter a job Description:

1. Select the position you would like to add a job description for, Example 'Operations Manager'.
2. In the Sub-Tab, select 'Job Description' to load the page as it appears in Sample Diagram S.No.33 Below.



S.No.33

In the text box, enter the corresponding Job Description (We also recommend adding Safety responsibilities to this section in order to communicate responsibilities with staff). When complete, 'Save Changes'.

Diagram S.No.34 demonstrates what this field appears like once 'Live' via the Administrative and Employee side of the SafetySync portal.

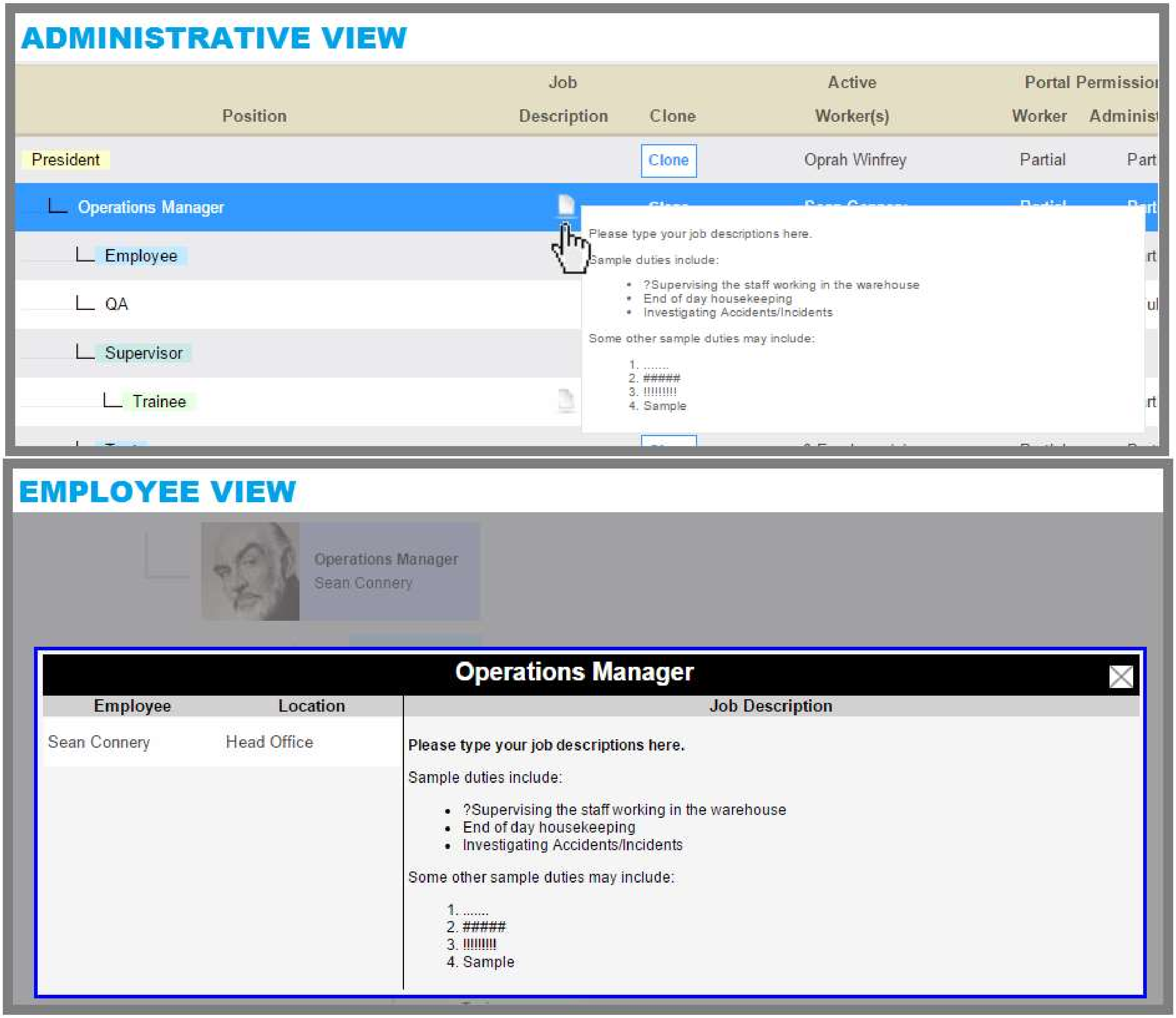


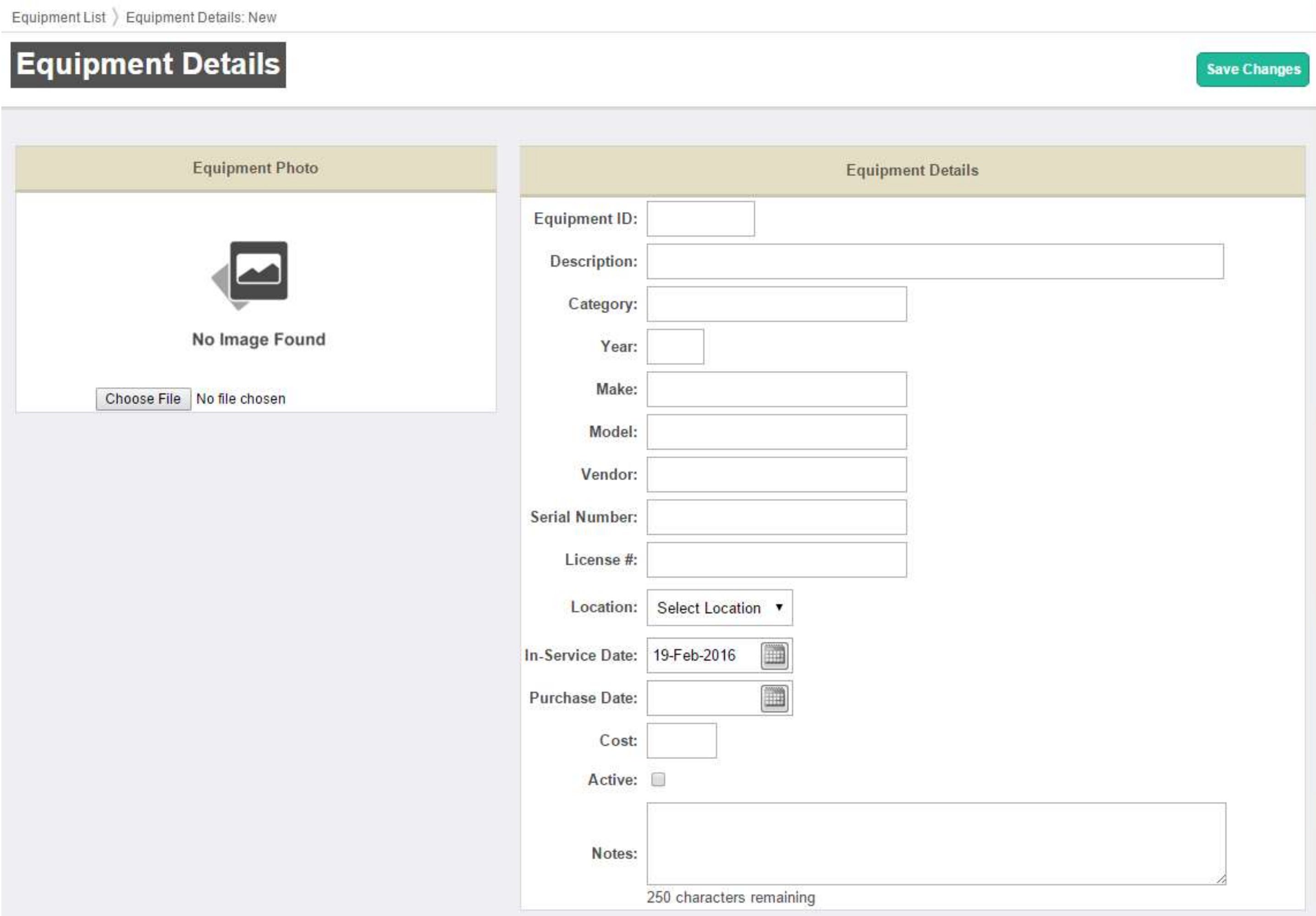
Diagram S.No.34

Step 4: Equipment

Before continuing on with your HSE Program content, we need to add to the foundation of 'building blocks' that support those features such as equipment/assets.

By Navigating to Admin > Company > Equipment > 'Add Equipment' you will be able to add Company Owned Equipment Including Vehicles, Rigs, ATV's, Respirators, Gas Monitors, Cranes etc. It's important to include your full list of equipment in an effort to utilize full functionality of the system.

Hint: Your Equipment List should be built keeping in mind your record keeping. For example, as a part of your safety program, if you collect and submit driver log records into the online system, you may want to add those Commercial Vehicles to the equipment list so those records can be associated with those specific units.

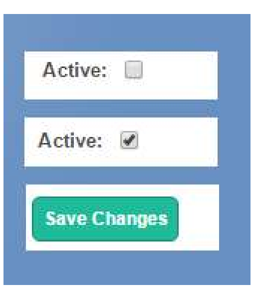


S.No.12

From this page, you may add a Photo of the Equipment as well as other criteria. The more content you can include in this area, will assist with utilization of other features . Some of the most critical fields to have completed include:

- Equipment ID
- Location
- In-Service Date
- ‘Active’.

One of the greatest benefits of the SafetySync system is that no data is ever lost (**Unless DELETED**). So if equipment is sold or taken out of service, you remove it from the active equipment list by DE-selecting the ‘Active’ Check box and Save Changes. This allows us to hide grandfathered data without losing it (associated records included).



S.No.13

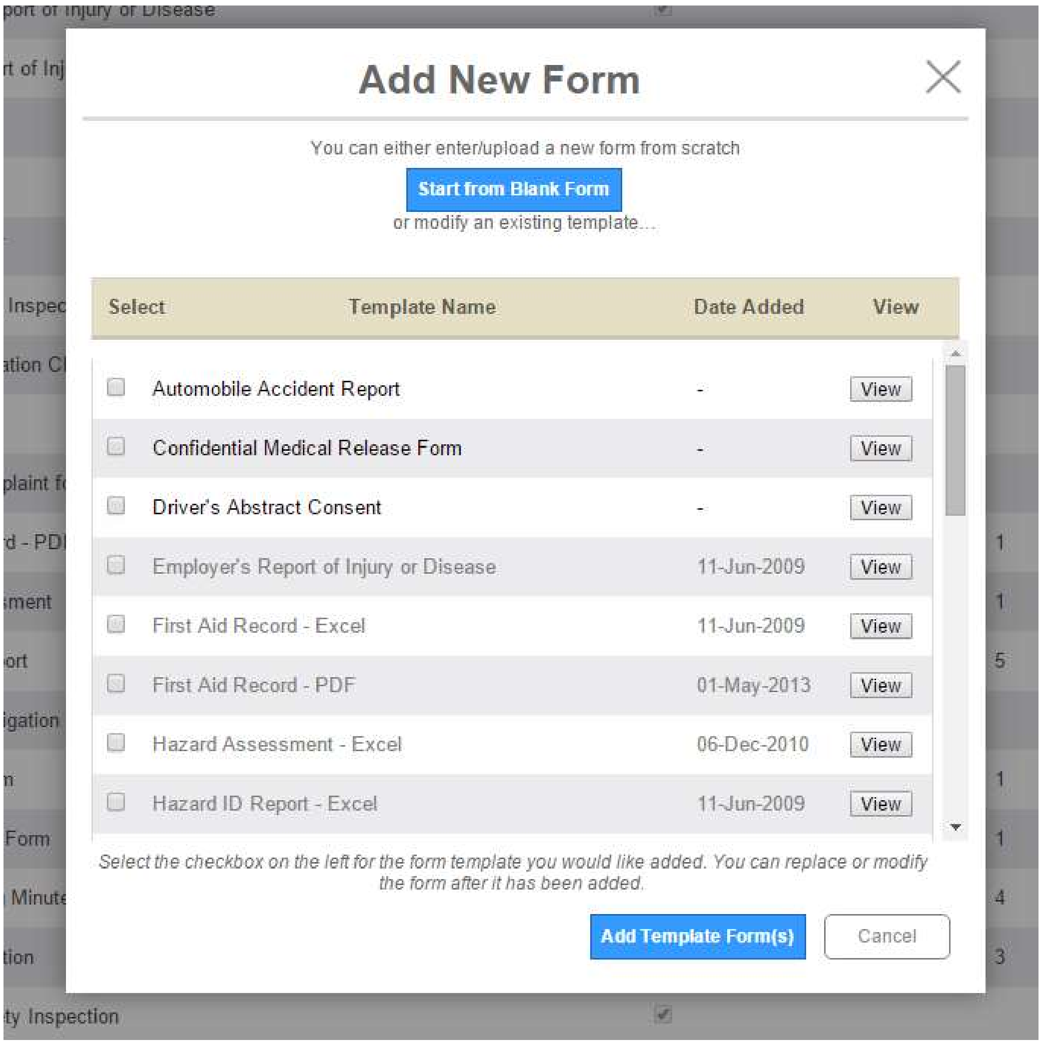
Step 5: Forms & Records

Another great building block for a smooth running Health & Safety Program Includes Forms and Records.

Form Templates

By navigating to Admin > Documentation > Forms > 'Add New' we are able to add templates of forms you are currently using at your company (PDF. Excel, Word) thereby making the blank templates accessible for staff to access in order to complete a record.

Once choosing to add a new form, you will be presented with another feature: Add a blank form of your own by selecting 'Start from Blank Form', or upload a form you need (but may be lacking) from our editable templates as demonstrated Diagram S.No.14.



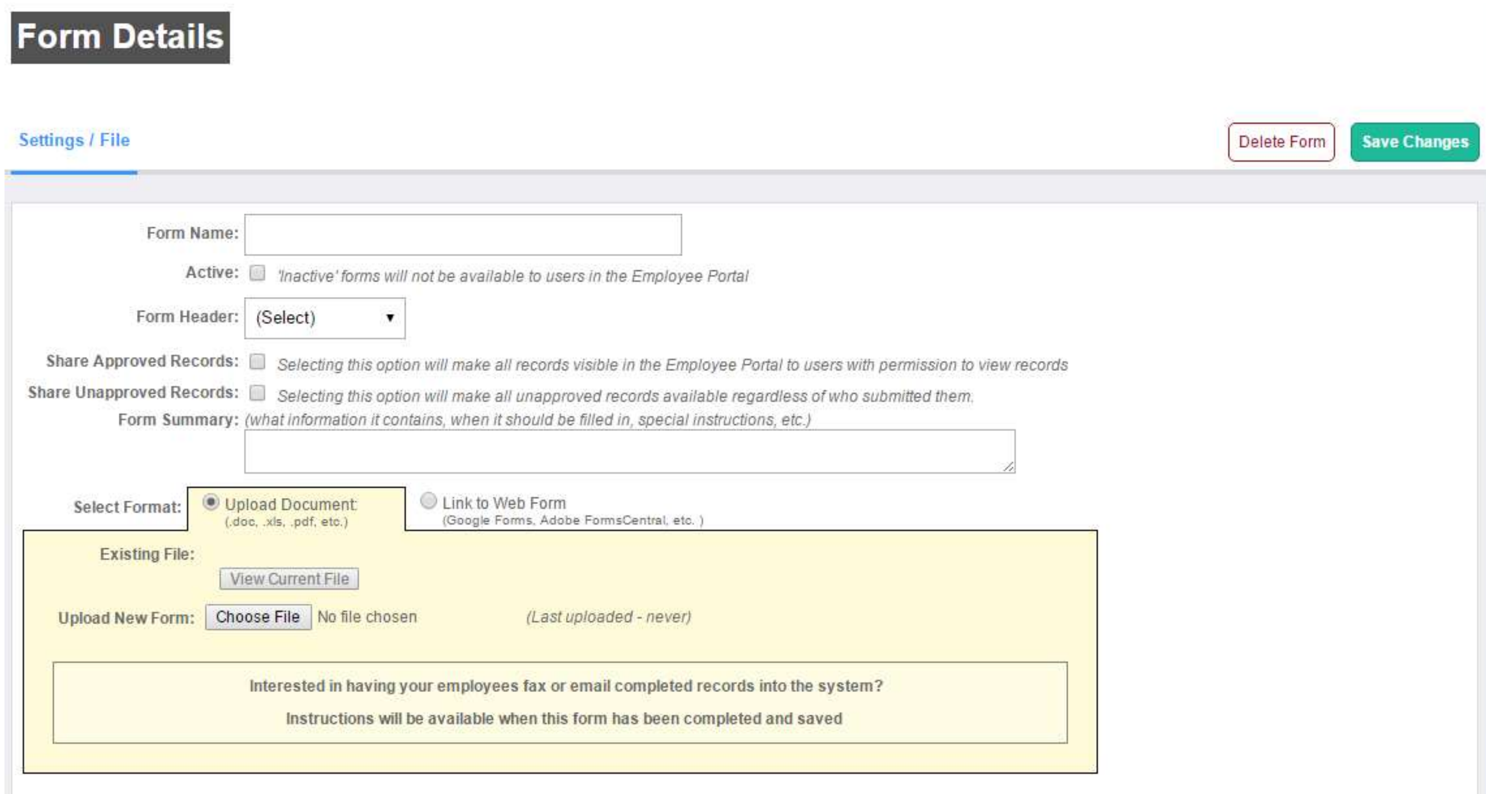
S.No.14

If you would like to upload your own PDF/Word/Excel/Link Document to the Form, choose 'Start from blank form'. This option will bring you to an area similar to in Image S.No.15. In this area, be sure to indicate:

- Form Name: Name of your form as you would like it to appear in the forms list.
- Selecting/Checking 'Active' means the form is valid and in use. As with other features, you may avoid deleting critical historical data by making old forms Inactive by de-selecting the 'active' box.

- Selecting 'Share Approved Records' Means those employees will be able to see the submitted records/data from 'My Portal' after they've been approved/reviewed/processed by a company administrator. While this is a great opportunity to share records for Safety Meeting minutes etc, it is also a good opportunity to ensure you aren't sharing sensitive data with all staff (Like HR Files, Accident Investigations, Other forms, etc.)
- Selecting 'Share Unapproved Records' means that employees will be able to see the submitted records in 'Raw' stages, before an admin has processed or approved them.

Hint: This feature of sharing approved or unapproved records with staff does not allow an employee, without administrative permissions, to delete any data.



S.No.15

PDF Forms

Under '**Select Format**' (the yellow area identified in Diagram S.No.15) you can '**Choose File'** to upload the PDF/Excel/Word Form file that you would like to upload. This functionality is best used for clients who prefer using paper forms and who prefers to submit those records into the system via Email or Fax.

Digital/Web Forms

Also under '**Select Format'** you can select the secondary option '**Link to Web Form**'. This feature is beneficial for those clients who prefer to use DoForms, Google Forms or other Digital Forms Service for completing these records. When selecting the option, you will be able to input the 'Web Form URL' and **Save Changes**. The digital forms option removes the need to scan or email records into the system as these systems send the records in to your SafetySync portal automatically for you when properly implemented.

Should you require more information about digitizing forms into this Link to complete online or Mobile Form format, please feel free to contact one of our partners listed on our company webpage. Alternatively, you can contact a forms creator directly such as DoForms or another system you prefer.

Hint: An Administrator has the option to switch between the 'Web Form' Version of a form and the Attached version of the form depending on 1) which option is selected and B) Which you have available.

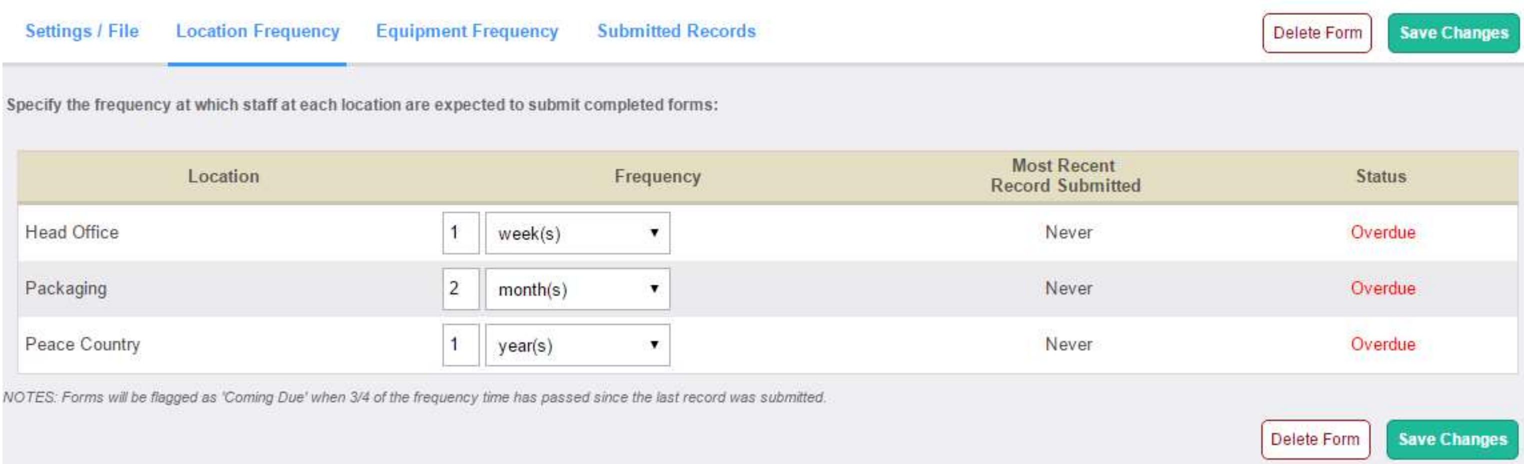
**It is also important to note the 'Share Approved/Unapproved Records' tab: This feature allows you to the option to share available records for a form with staff. You may want to utilize this feature for items such as Safety Meeting Minutes for example.

Assigning Frequency

Once your forms list has been created, and attachments or links input into SafetySync 'Forms', it is important to select Frequency. This will also help a great deal when it comes to reminding your Company Administrator of records that are coming due/past due for submission/record keeping. This will also allow for records associated with locations or equipment to be tied directly to units or facilities.

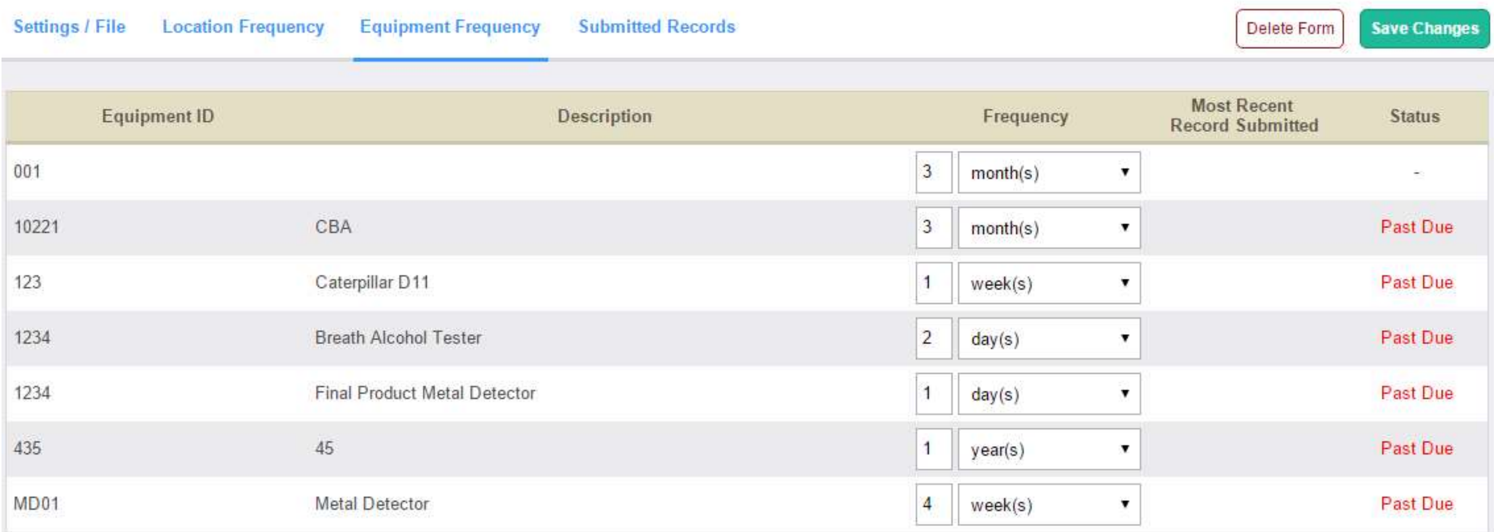
To assign Frequency, navigate to Admin > Documentation > Forms > Choose the form you'd like to use

- 'Location Frequency' Sub Tab:
    - How often do you want various locations submitting a completed record for this form? Depending on the frequencies you set, the status will indicate 'Coming Due', 'Past Due', 'Overdue', and 'Current'.



S.No.16

- 'Equipment Frequency' Sub Tab:
    - How often do you want to see/receive records for various pieces of Equipment? Depending on the frequencies you set, the status will indicate 'Coming Due', 'Past Due', 'Overdue', and 'Current'.



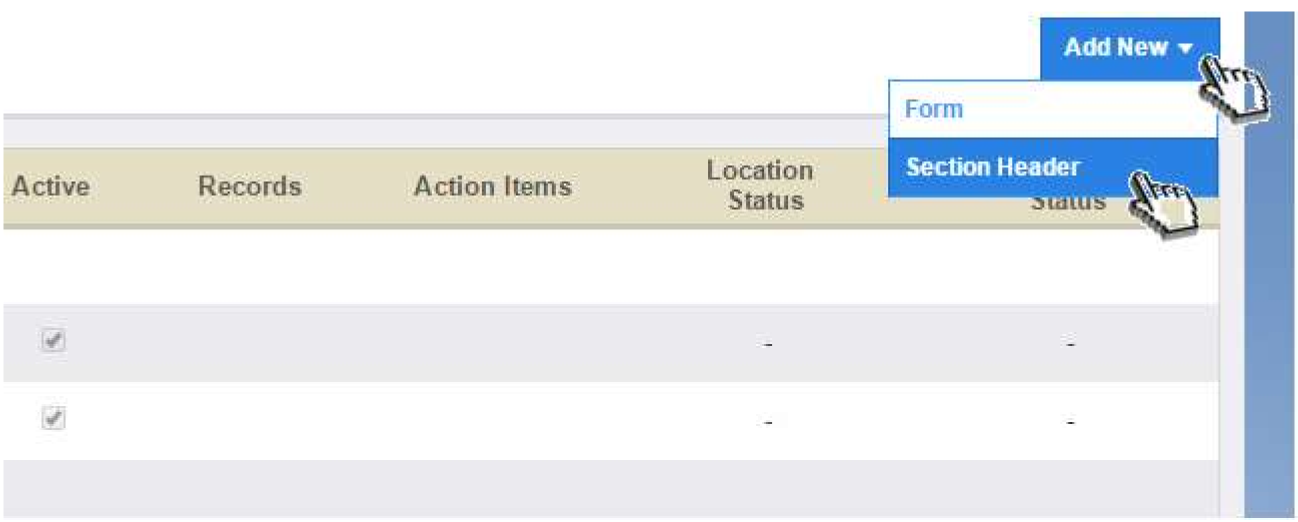
S No.17.

- **<u>Example:</u>** If you create a form place for 'Commercial Vehicle Inspection Certificate', you can date the record (when processing) for the completion date of inspection. Then, set the equipment frequency so that you will be effectively notified when that CVIC is coming due for that specific piece of equipment.

Hint: It is recommended that your frequencies match what is written in your company Policies. For example: If your **Equipment Preventative Maintenance *<u>Policy</u>*** states that we will perform service on our equipment every 3 months, the frequency for that piece of equipment and its associated form(s) should be assigned accordingly.

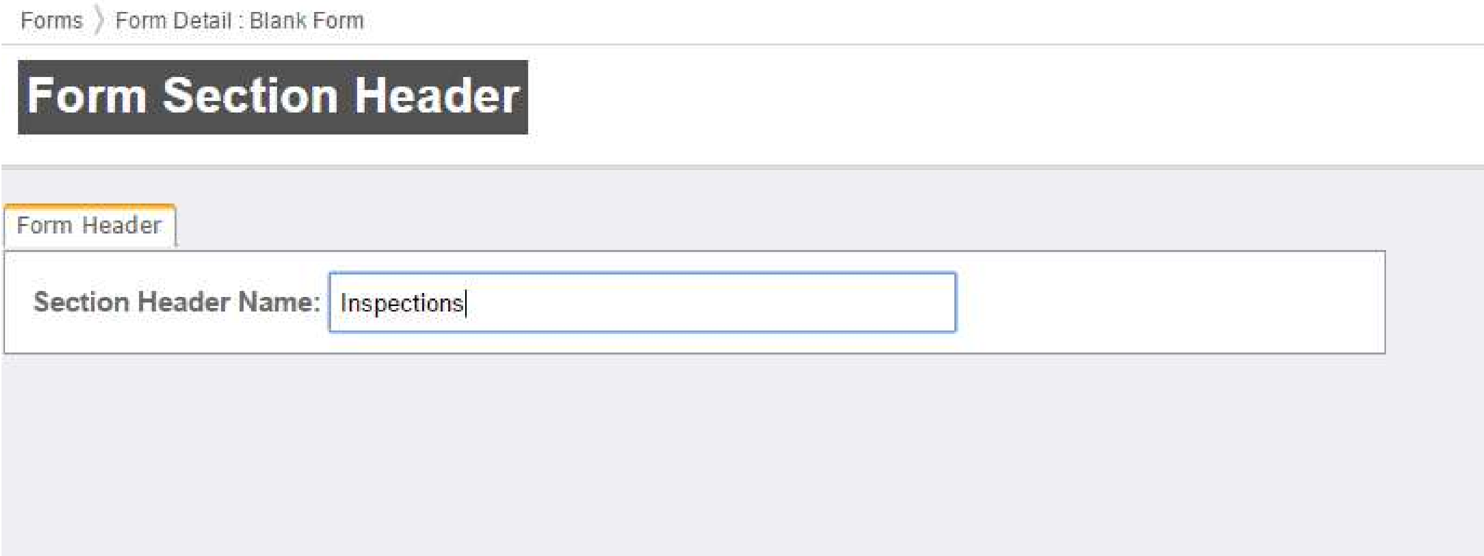
Form Headers

When adding forms, it is recommended to include 'Section Headers' which will help organize your list of forms into sections. To add a section header, Navigate to **Admin > Forms > Add New > Section Header** as outlined in Diagram S.No.35.



S.No.35

When your page loads, you will be required to enter a 'Section Header Name'. For Example, 'Inspections' as outlined in Diagram S.No.36. Followed by **'Save Changes'**.

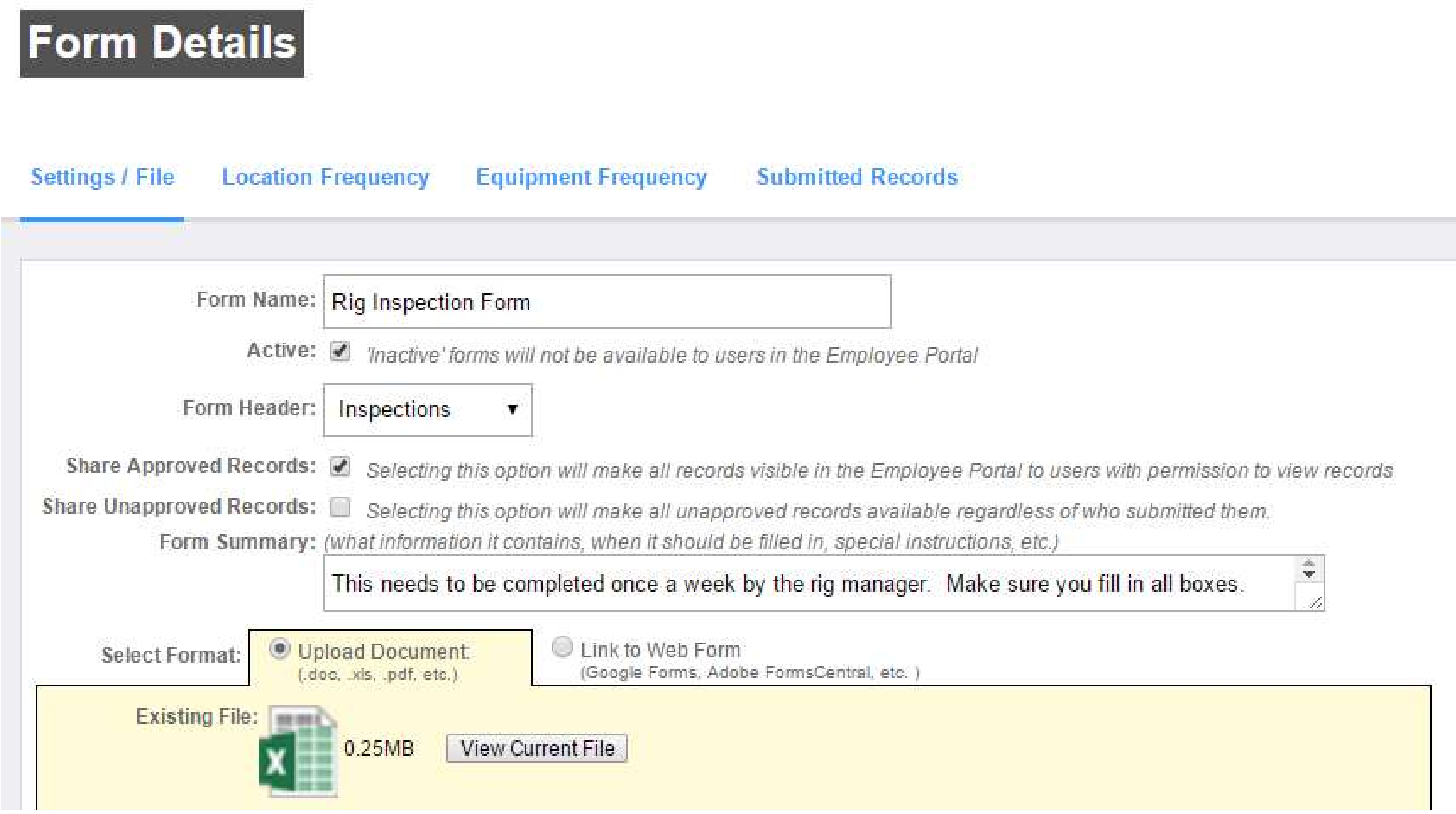


S.No.36

Once your header is saved head to the form's details page that you want to place under the header. In the settings tab you'll find the Header drop down list which will be populated with the various headers you have created. Choose the appropriate one for your form and save your changes. Forms will appear alphabetically under the associated header.

Next, Navigate back to Admin > Documentation > Forms.

After your form space is created, you may select the header from the following page. For example, on a Rig Inspection form, the form header **'Inspections'** is now an available option under the '**Form Header**' drop-down menu as demonstrated in Diagram S.No.37. **Save Changes.**



S.No.37

For demonstration purposes, multiple forms have been added to the 'Inspections' Form Header. Diagram S.No.38 demonstrates the appearance of the forms/form headers as it appears from the employee view of the portal.

S.No.38

Processing Records

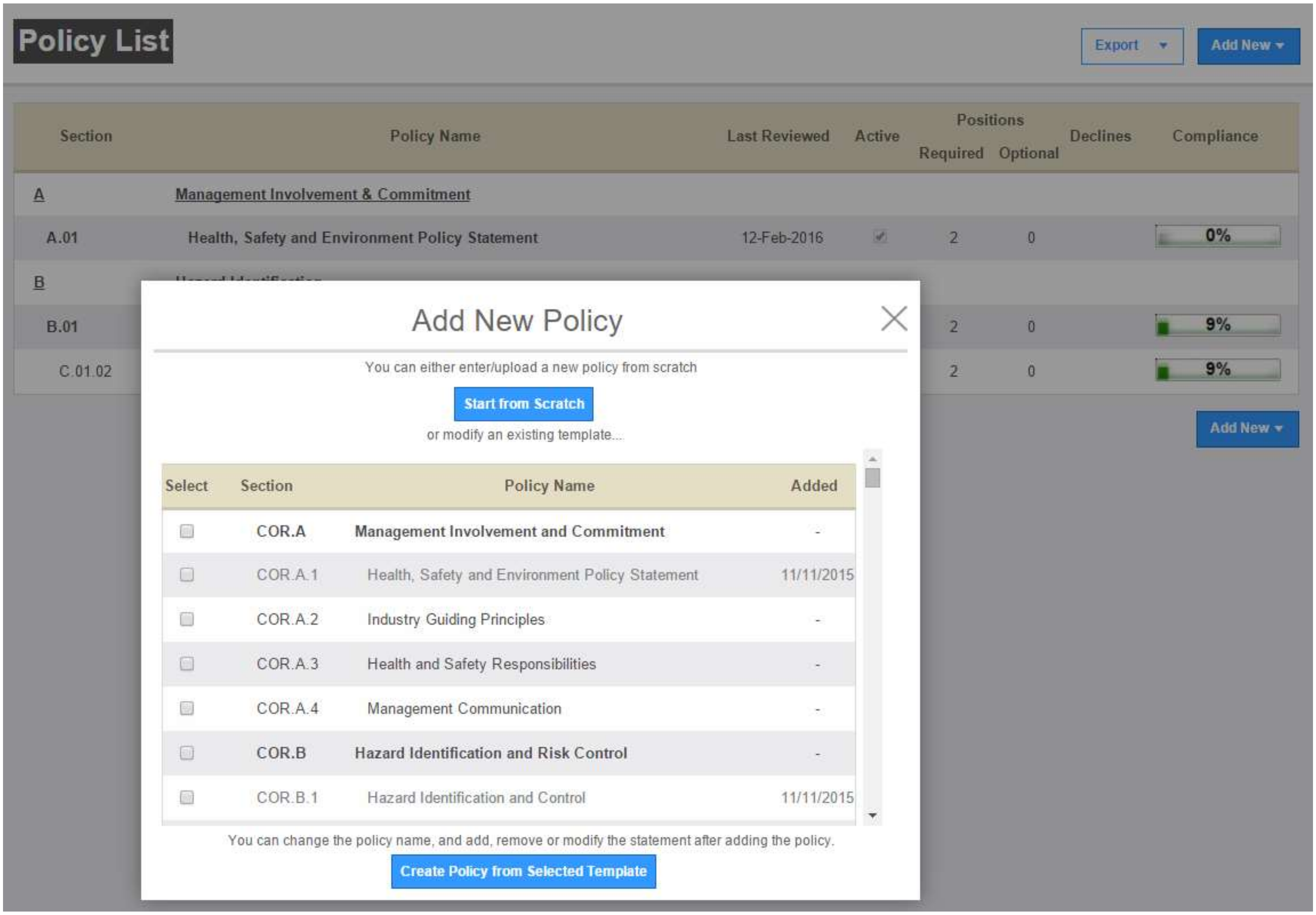
- When processing records, be sure to include:
    - The 'Date' as the Date the record was completed
    - Identify the Name of the person who completed the record
    - Job # / Other
    - Identify Location
    - Critical: Identify Equipment*
    - Critical: Identify Incident if there is one
    - Add action items where appropriate.
- This area will be discussed in further detail in **Part II**.

Step 6: Policies

Health and Safety Policies are an integral part of your company Health and Safety Program. Once input and assigned correctly, you can extract compliance reports for employees who have reviewed the content, set time limits for how long the policy should be reviewed, add signing authority etc. all of which will be reviewed throughout this step.

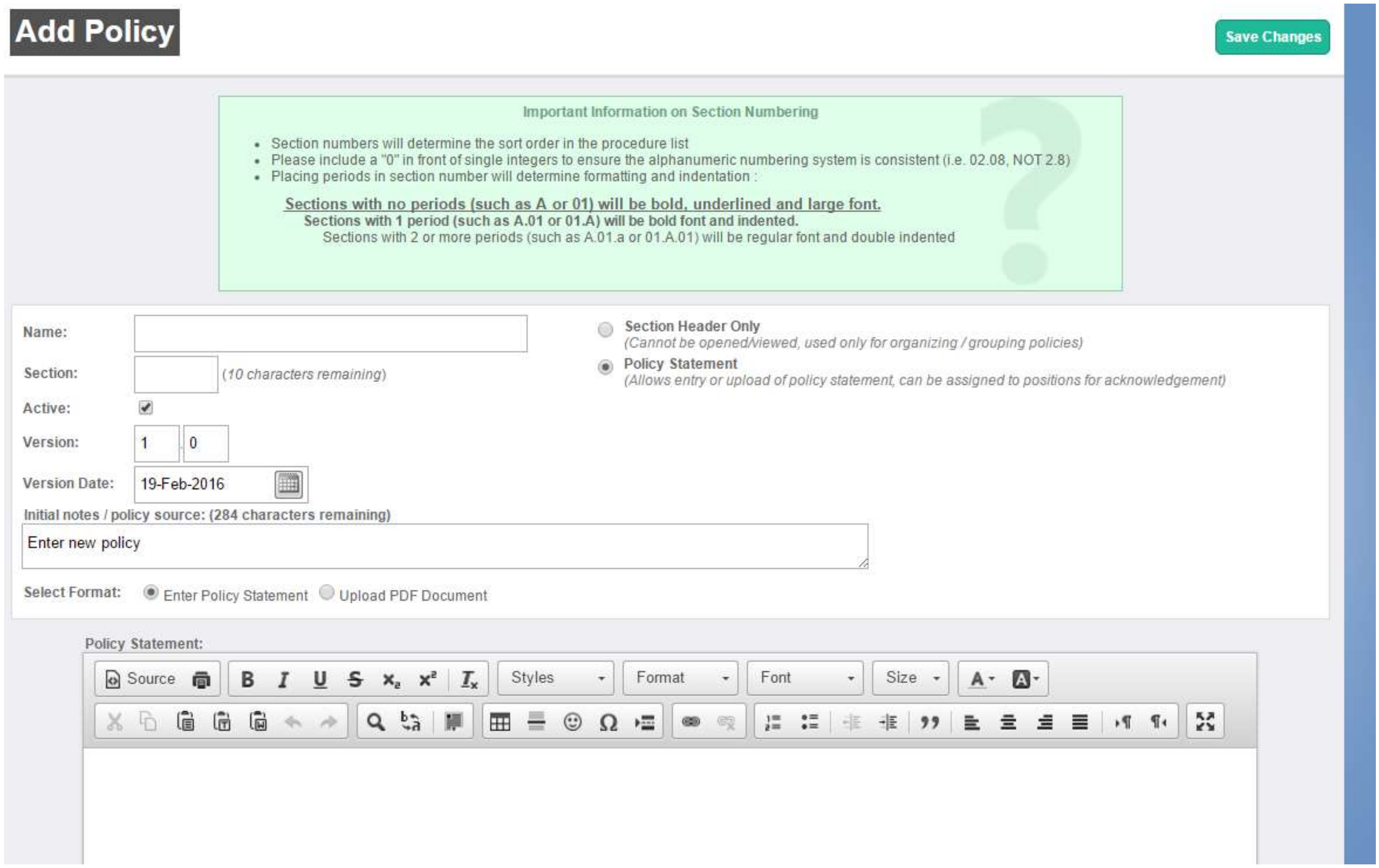
Policy Addition

To Input your first policy (for example: Health, Safety and Environment Policy Statement) navigate to Admin > Documentation > Policies > 'Add New - Policy' (Image S.No.8) SafetySync will provide a list of templates you can modify to fit your company, or you can 'Start from Scratch' and upload your existing content.



S.No.8

Whether you choose the policy from a selected template, or whether you start from scratch, your next loaded page will look similar to the sample below (S.No.9).



S.No.9

This document will act similar to a word document – providing the functionality of formatting your text to Bold/Italic/Font Changes, Bullet Points, Indentation/Centering and much more.

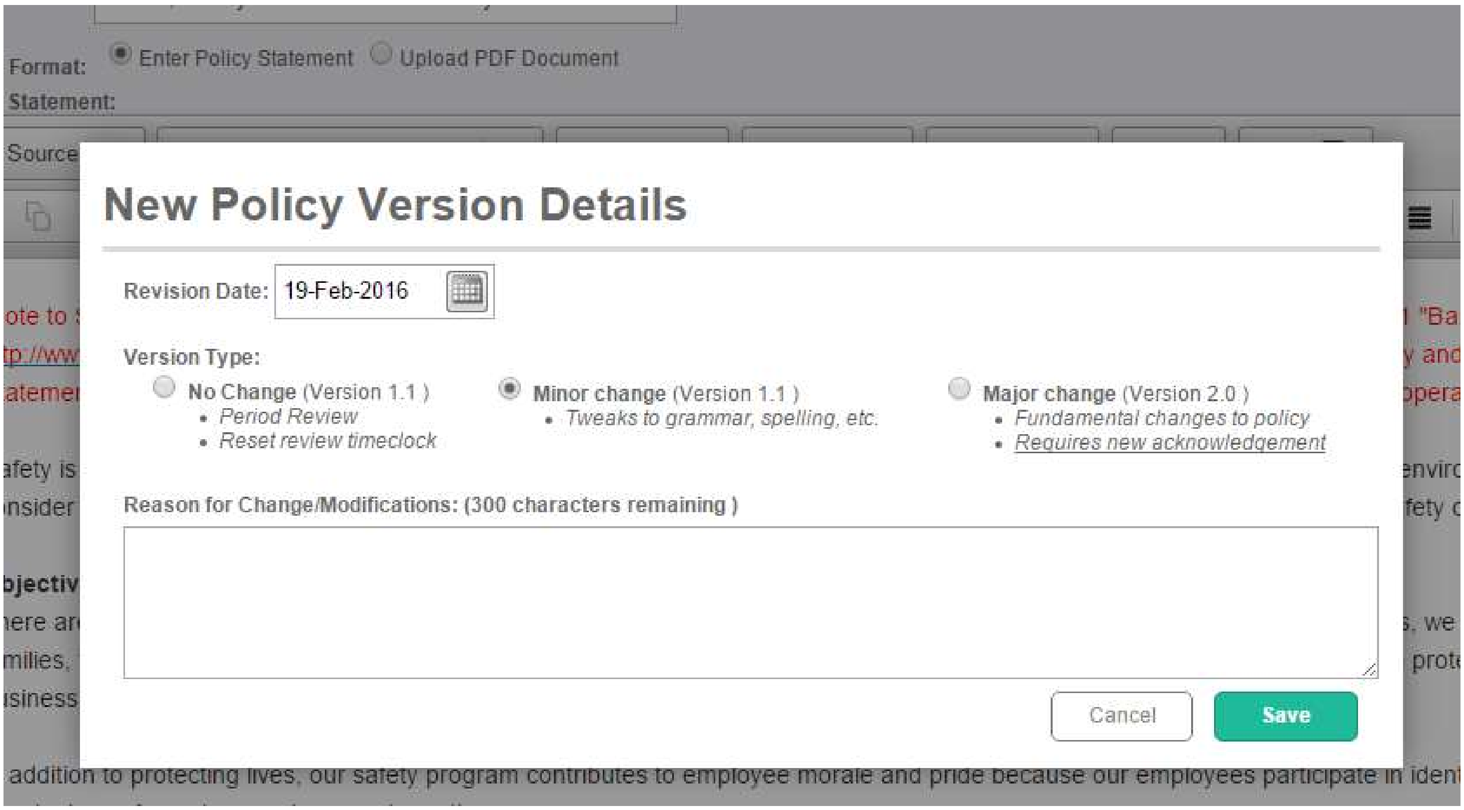
- **Name:** your policy title
- **Section:** Depending on the alpha-numeric ID you choose for your Policy (COR.A.1 for example)it will fall into sequence in the policy list. You can change the 'Section' ID for your policy at any time (Under 'Settings') after initial saving is complete.
- **Version:** Default version for a new policy is '1.0' but this can be changed to meet the actual version on your written copies. The system will retain all previous versions of policies and will re-number new revisions based on their updates. This will be discussed later in this step – see '**Policy Changes'** section for guideline.
- **Version Date:** This can be modified in order to back-date your policy if required.
- **Select Format: SafetySync allows you to upload one of 2 versions of your policy. Either in an open-text format that only Company Administration can access by using the 'Enter Policy Statement' option OR by using the 'Upload PDF Document' option.**
    - Note: it is important to recognize that the recommended option in this instance is to input the Policy Statement as Text since it allows for ease of policy amendments and allows us to add the signature via (Settings) – see '**Policy Changes**' section for guideline.
    - *Additionally, inputting your Policies as Text format will allow use of the ESL Feature which is described in Part II: Adding Workers.*

- If you have chosen a sample from a template, be sure to remove the RED TEXT that will appear on the top of the document ('Note to Sample Company policy review committee or individual') when performing additional policy edits.

***Before navigating away from pages you are working in or modifying, remember to 'Save Changes' so that none of your information is lost.**

Policy Changes

You may update your policy and policy compliance at any given time simply by uploading your new version and 'Save as New Version' Where you will be provided 3 options, as indicated in image S.No.10.



S.No.10

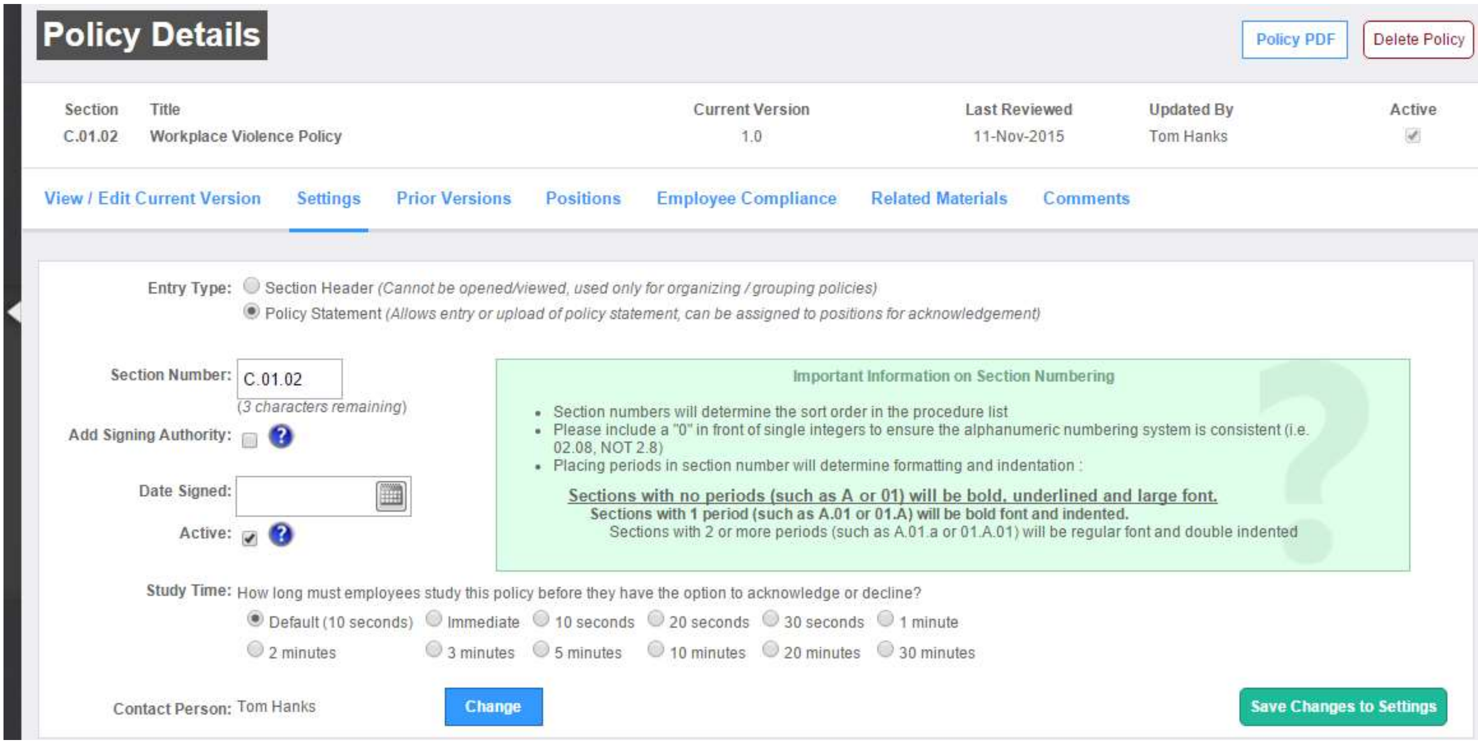
Version Type:

- **No Change:** re-sets the date on the document and demonstrates it has been renewed. This does not affect the positive compliance for those staff who have already reviewed the document.
- **Minor Change:** If chosen, changes your version to an amended version (1.1 in this example). This does not affect positive compliance for personnel who have previously reviewed. Also renews the date of the policy.
- **Major Change:** If this option is chosen, it will generate a brand new version (2.0 in this example) and will RESET the compliance for staff who have reviewed it
- **Save.**

*It is highly recommended that you enter a reason for change modifications into the blank space available in this area as it will explain what changes were made to the version(s) and why. Up to 300 characters Maximum are allowed.

Additional Policy Settings:

There are many other features available to add to your new policy as well. These include assigning to people for review and much more!



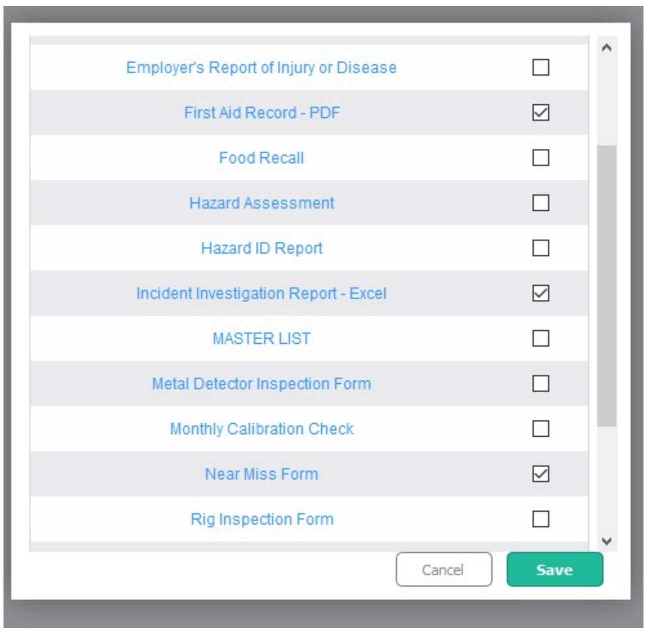
S.No.11

- '**Settings**' **Sub-Tab:**
  - **Section Number:** This section allows you to change the section number of the policy to change the order in which the policy is displayed in the Admin > Documentation > Policies list.
  - **Add Signing Authority**: This attaches the signature we have uploaded earlier on from the company profile, to appear on the signed document. Select this option to attach the signature. Leave the field un-checked if you would like the document to be published without a signature.
  - **Date Signed**: A date shouldn't be chosen assigned unless the 'Add Signing Authority' has been activated ('Checked').
  - **Active**: This box must be selected or 'Checked' in order for the policy to become 'Live'.
  - **Study Time**: Study time can be adjusted based on the importance or length of the document. This is the amount of time that must pass before the employee can choose to accept or decline the policy – a time which is used to review the content therein.
  - **Contact Person:** This name defaults to the person who created the policy, but should be assigned to the person with permissions to change a policy (Like an administrator, Safety Personnel, Document Control or Other). If future staff 'Decline' a policy, this contact person will be notified when the decline occurred and why it was declined.

*Note: You can 'Turn off' or 'Deactivate' a policy at any time without deleting/losing the content by simply de-selecting the 'Active' box under Settings for the associated policy. This will prevent new reviews of the policy without losing the old content and old compliance. Administrators will see the inactive policy but employees won't see it via 'My Portal'.

- '**Prior Versions**' **Sub Tab:**

- Allows access to previous versions of a Policy and includes reasons for version changes

- **'Positions' Sub Tab:**
    - This will only be populated if your organizational chart has been added under 'Positions' first. From this area, you can select which positions you want N/A, Optional or Required to review the policy. Choosing 'Required' will affect the personnel compliance until the policy is reviewed.
- **'Employee Compliance' Sub Tab:**
    - This tab will only be populated once employees have begun review. If you want to see compliance for this policy having been reviewed select 'Search' (leaving all filters blank). You will see who is, and who is not compliant as well as the date they became compliant.
    - Another feature in this section is to choose 'Acknowledge' to recognize review of the policy on behalf of staff. This is not recommended, for legal purposes, unless you have written signed documentation from the employee stating that they have accepted the document(s). It is recommended to increase compliance via staff logging into the online system directly.
- **'Related Materials' Sub Tab:**
    - In this section you may links Forms associated with Policies. For example, you may want to link your Job Hazard Analysis Form to your Formal Hazard Assessment Policy. On this page, when you choose **'Add Related form'** you will be presented with a screen that allows you to select and save forms, as in diagram S.No.22. This allows forms to be accessible to employees directly from the relevant Policy.
    - 

      S.No.22
- **'Comments' Sub Tab:**
    - This page will display all feedback comments made on the individual policies.

Policy Header

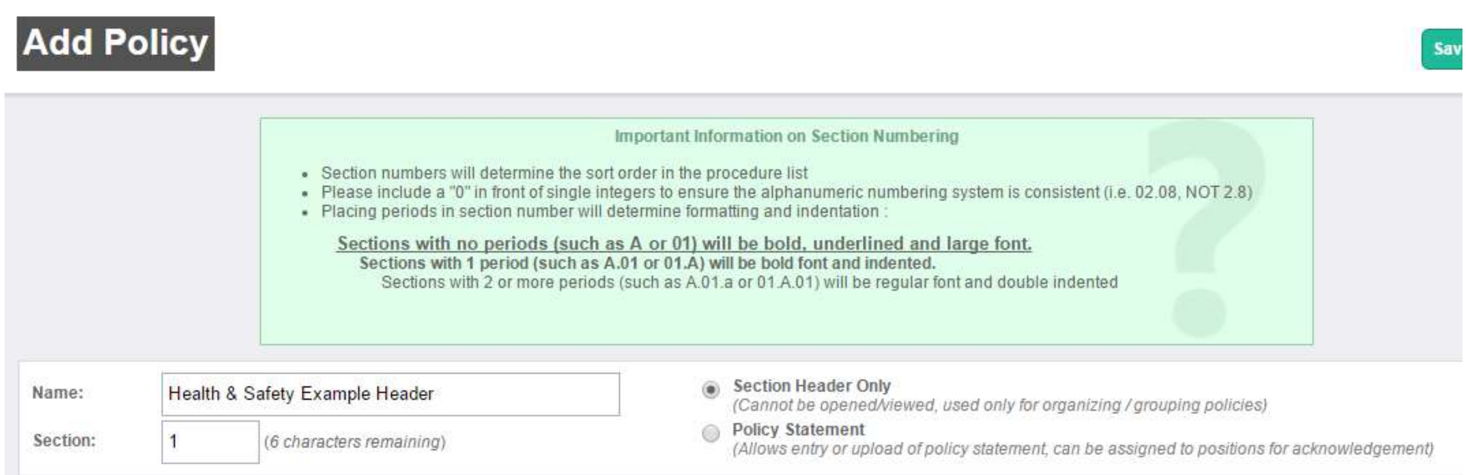
Similar to that of Forms, Policies may be organized or grouped by Section headings as well. To add a header to Policies, Navigate to **Admin > Documentation > Policies > Add New > Section Header** as outlined in Diagram S.No.39.

S.No.39

The next page loaded will appear something like that in Diagram S.No.40. You must indicate your section number as well as the header you would like other documents placed under.

HINT: No documents may be uploaded under a section header as this feature is primarily used for organizational and layout purposes.

For the Section Header Number (Under 'Section'), If a whole number is entered (example: 1) the header will appear Underlined and Bolded within the policies page. If a decimal number is entered here (example: 1.00) the header will not appear underlined or will not appear as clear a divider between sections.



S.No.40

Save Changes

Section	Policy Name
1	Health & Safety Example Header
1.01	Health, Safety and Environment Policy
1.02	Health & Safety Responsibilities for Management
1.03	Health & Safety Responsibilities for Supervisors
1.04	Health & Safety Responsibilities for Workers
1.05	Health & Safety Responsibilities for Sub-Contractors
1.06	Health & Safety Responsibilities for Visitors
A	Management Involvement & Commitment
A.01	Health, Safety and Environment Policy Statement
B	Hazard Identification
B.01	Hazard Identification and Control
C.01.02	Workplace Violence Policy

S.No.41

Diagram S.No.41 outlines what the final result should appear like once headings are added. In this example, headers are '1 Health & Safety Example Header', 'A Management Involvement & Commitment' as well as 'B Hazard Identification'.

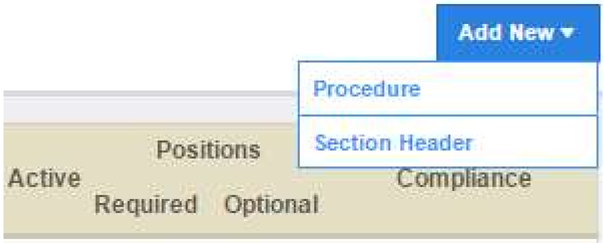
Step 5: Procedures

Safe Work Procedures are also a valuable asset to any Health and Safety Program. This section may be used to upload any of your preferred Safe Work Procedures, Formal Hazard Assessments, Emergency Procedures and any other relevant subject matter.

Note: at this time, procedures may only be uploaded as **PDF** OR as a **YouTube Video**, with future plans for additional available formats.

Uploading:

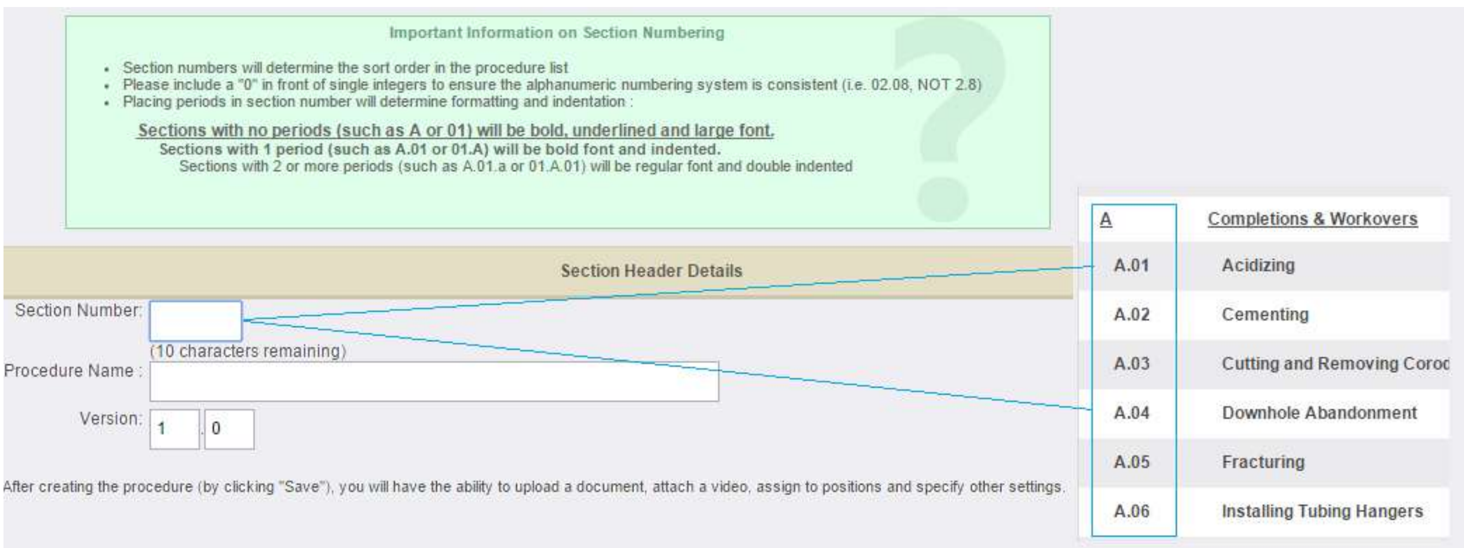
On the top right hand side of your page you must choose **'Add New'**, after which you will choose **'Procedure'** or **'Section Header'**(*Section headers help to organize headings for your procedure sections*). To add a new procedure, choose **'Procedure'**.



S.No.18

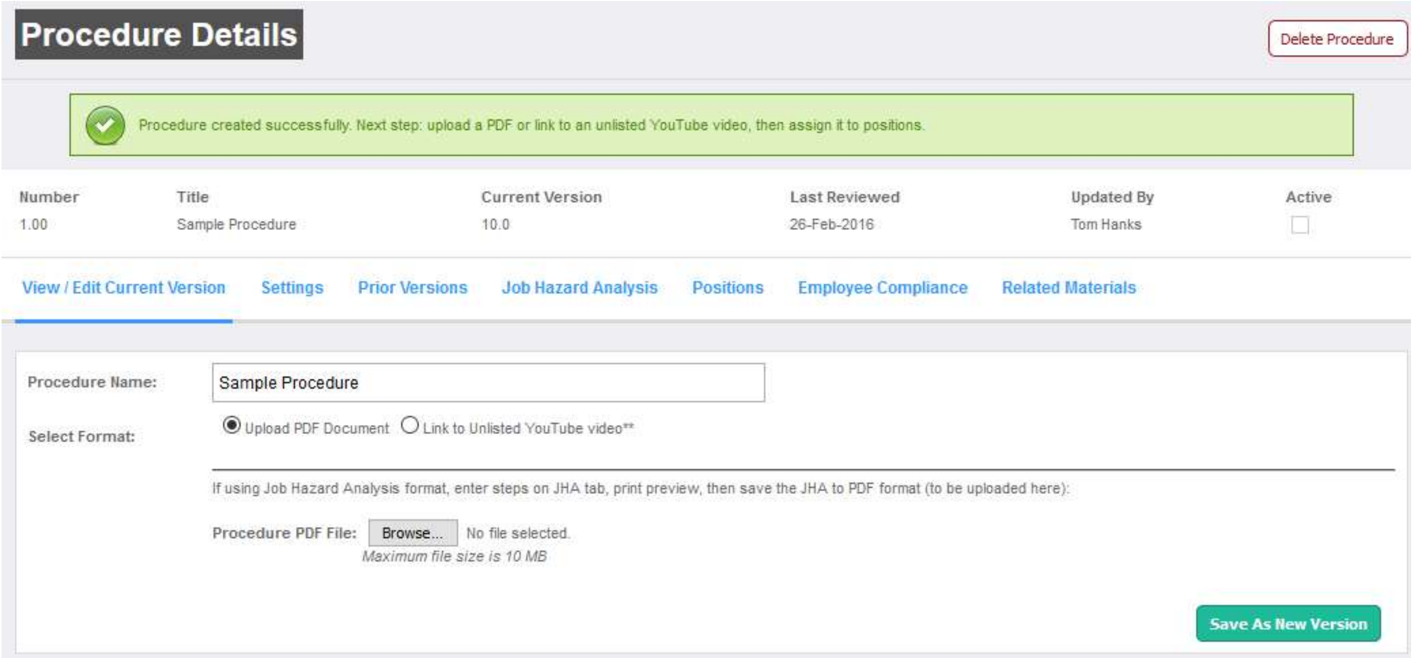
On your next page, you will be required to enter in a section number – which determines where this procedure will be placed in your Health and Safety Procedures list upon saving. S.No.19.

Procedure Name text may be entered. The system will automatically set this procedure as version 1.0 (as displayed in example S.No.19) unless changed by the user. *For example, the hard copy procedure you are entering may be Rev.10. Version 10.0 may be entered in the text box in this instance* - **and as always, Save changes!**



S.No.19

Upon saving, your page will appear similar to S.No.20 where we have added functionality.



S.No.20

As previously mentioned, you may choose your format :

- Choose **'Upload PDF Document'** and utilize the 'Browse' button to choose your PDF to upload from your computer. **NOTE: The larger the PDF file is, the longer it will take to load on the employee side of the portal.**
- Otherwise, choose **'Link to Unlisted YouTube video'**:
  - Hint: If you will be linking to a YouTube video, you will require a free YouTube account for your organization (learn more) . It is recommended that you upload your video to YouTube as "Unlisted" to prevent searching and viewing by the public (learn more)
  - **Make a note of the video ID (12 digit string after v= in the URL under Sharing options (e.g. TdoAYC1EGJ8) to be entered into 'YouTube Video ID'.**

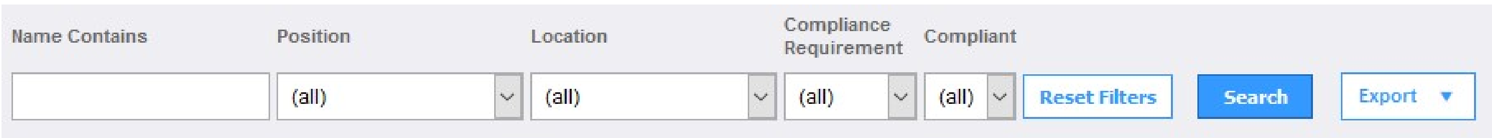
Save as New Version once upload is complete / once video ID is input.

Assignment

- **Settings** Sub Tab
  - Here you can change the Procedure Section Number, Make the Procedure 'Active' or 'Inactive' depending on whether or not the **'Active'** box is selected, Change the Study time and Change the contact person for this procedure.
  - Hint: you may want to ensure your contact person is holding a longstanding company position so that during turnover, the contact person would not require change.
- **Prior Versions** Sub Tab
  - You always have access to any previously uploaded versions which may be exported.
- **Job Hazard Analysis** Sub Tab
  - Discussed in-depth in **Part II**
- **Positions** Sub Tab
  - Select the positions you want **'N/A**, **'Optional'** and **'Required'** to review the associated procedure.

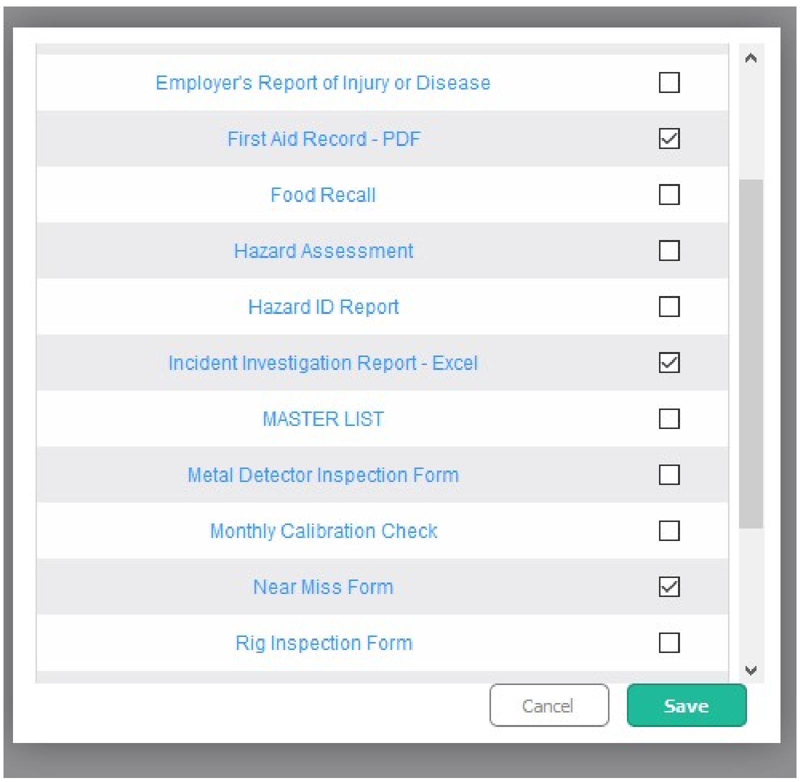
- Optional: You may choose the exposure frequency in this section if you plan to use the SafetySync Job Hazard Analysis tool .

- **Employee Compliance** Sub Tab
  - You may simply choose **'Search'** to display all results, or set filters. You may also **'Export'** your data as PDF or Excel.



S.No.21

- **Related Materials** Sub Tab
  - In this section you may links Forms associated with Procedures. For example, you may want to link your Incident Report form to an Emergency Preparedness Procedure. On this page, when you choose **'Add Related form'** you will be presented with a screen that allows you to select and save forms, as in diagram S.No.22. This allows forms to be accessible to employees directly from the relevant Procedure.



S.No.22

Procedure Headers

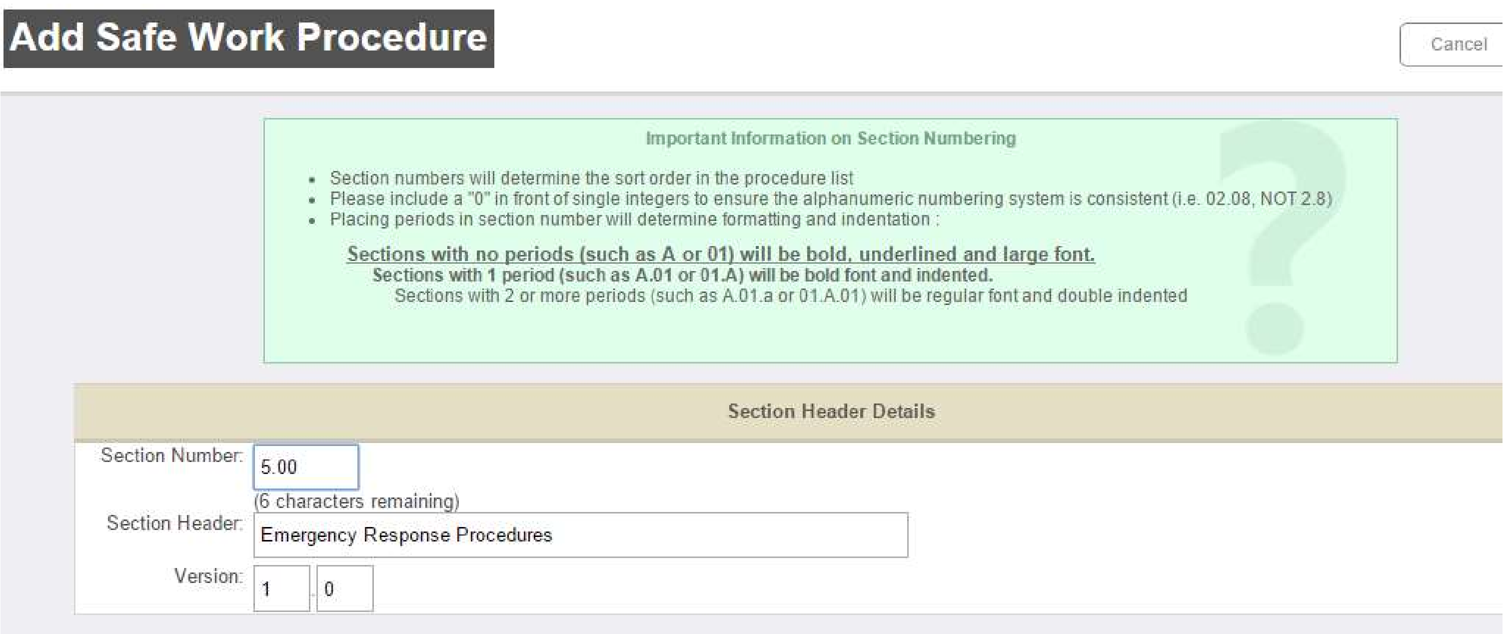
Similar to that of Forms and Policies, Procedures may be organized or grouped by Section headings as well. To add a header to Policies, Navigate to **Admin >Training > Procedures > Add New > Section Header** as outlined in Diagram S.No.42.

S.No.42

The next page loaded will appear something like that in Diagram S.No.43. You must indicate your section number as well as the section header text you would like other documents placed under.

HINT: No documents may be uploaded under a section header as this feature is primarily used for organizational and layout purposes only.

For the Section Header Number (Under 'Section Number'), If a whole number is entered (example: 1) the header will appear Underlined and Bolded within the policies page. If a decimal number is entered here (example: 1.00) the header will not appear underlined or will not appear as clear a divider between sections.



S.No.43

Save Changes. **To Activate the section header, after saving, navigate to 'Settings'. Select 'Active' and Save Changes to Settings again.

5	Emergency Response Procedures
5.01	Floor Plan for Alberta Warehouse
5.01.1	Aerial view of Alberta shop with Muster Point Identification
5.02	Fire Evacuation Procedures
5.03	Natural Disaster

S.No.44

Diagram S.No.44 outlines what the final result should appear like once headings are added.

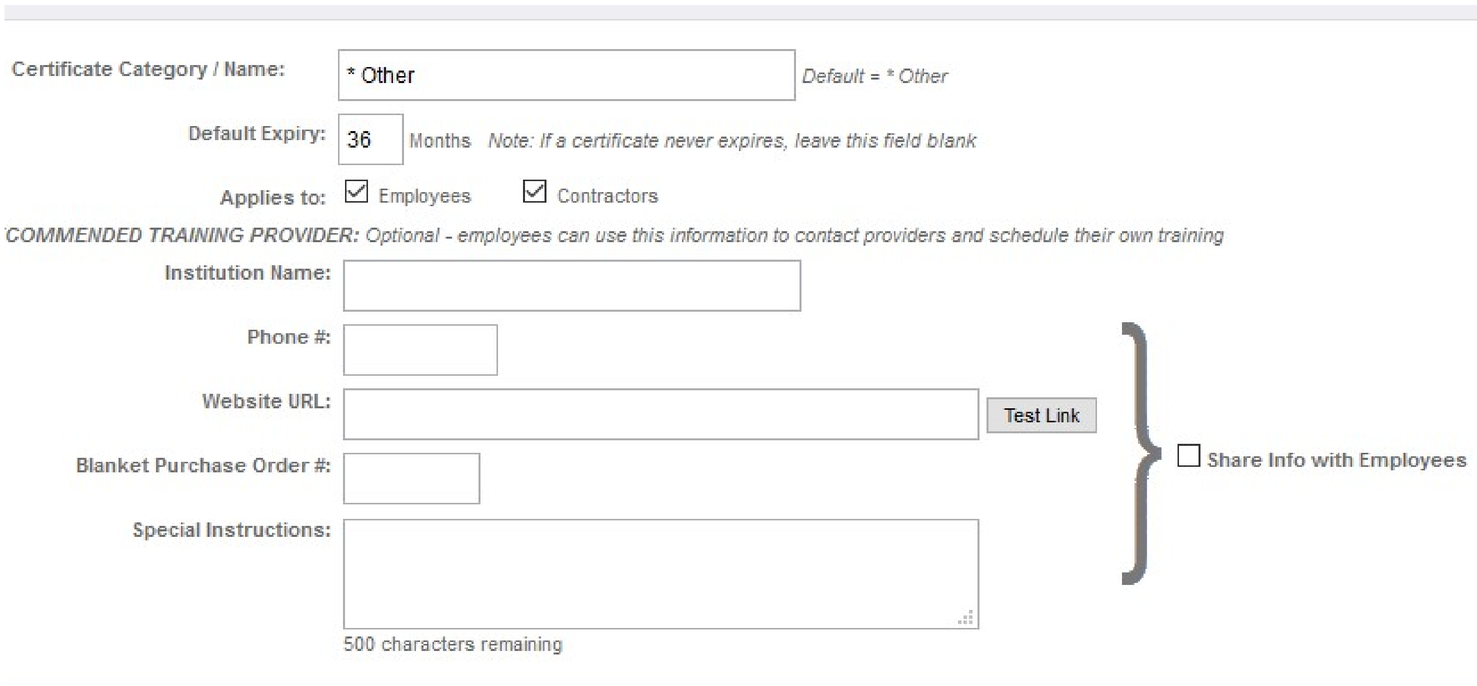
HINT: Procedure Section Numbering must be assigned appropriately in order for the procedures to appear beneath their heading (example 5.01 must be entered for the 1st Procedure in order to fall beneath section 5 – Emergency Response Procedures). Your procedures must also appear as 'Active' (Under 'Settings' for the procedure) before it will be 'Live' and viewable from the Employee side of the SafetySync Portal.

Step 6: Certificates

Navigate to **Admin > Training > Certificate Tracking > Add Certificate Category**.

In addition to completing courses online via SafetySync, our '**Certificate Tracking**' tool allows you to upload certificates pertinent to your workers positions. You may utilize this feature to upload any type of certificate, including but not limited to: H2S, Drivers Licenses, Drivers Abstracts, First Aid, Journeyman Certification etc.

From these steps, you will be provided the option to choose an EXISTING certificate category, OR Choose **'Other'** (Last Option) & **Continue** in order to create your own category.



S.No.23

If you did choose **'Other'** we recommend you change the **'Certificate Category / Name'** to the name of your certificate or ticket. Set the default expiry that you may want your certificate to expire (i.e. 36 Months = 3 Year Expiry) and whether or not the certificate applies to Employees and/or Contractors.

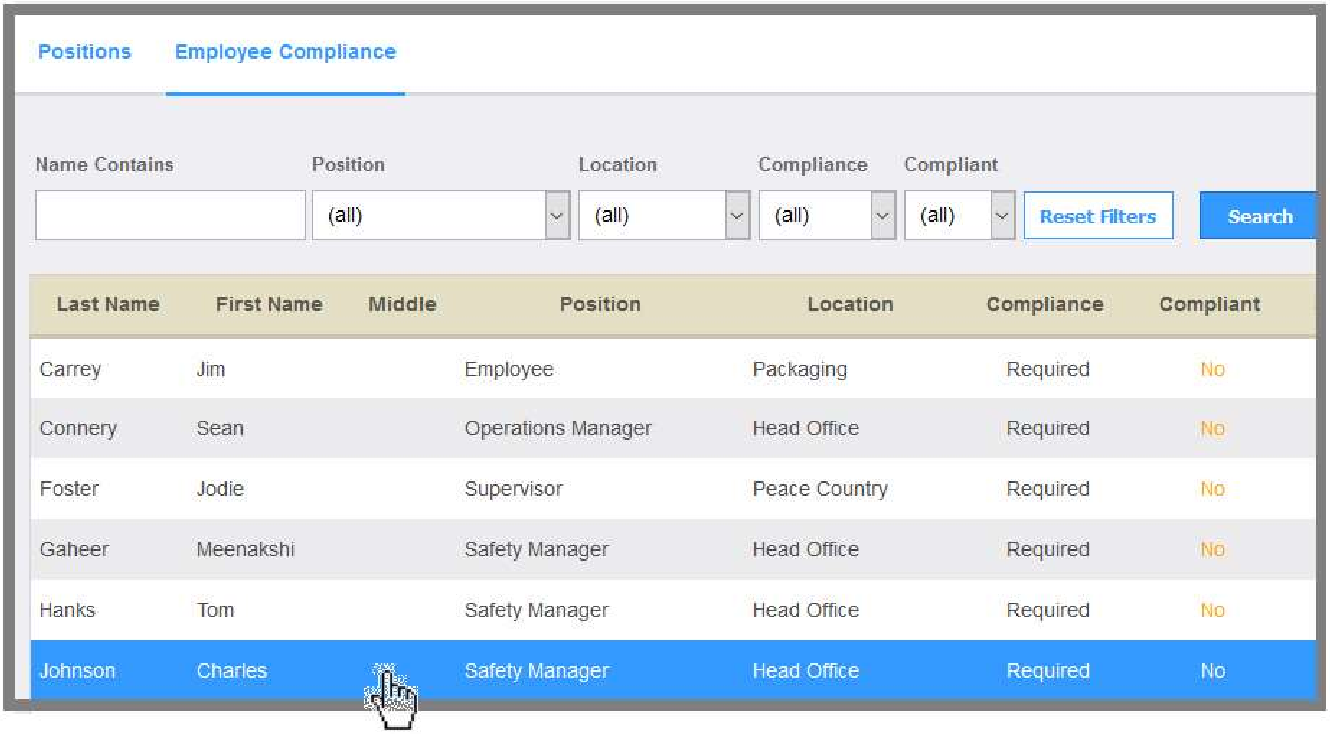
'RECOMMENDED TRAINING PROVIDER: Optional - employees can use this information to contact providers and schedule their own training'. In order to activate this section, select the check box for **'Share Info with Employees'**.

- **Positions:**
  - Select **N/A, Optional or Required** for Positions.
- **Employee Compliance:**
  - Search and/or use filters to pull up your relevant information demonstrating compliance with certificates. These compliance reports may be exported via PDF or Excel. These reports are only valid at time of printing since new certificates may be input/approved afterwards.

* There are two ways in which to upload certificates within the online system: Via the Administrative side and also via the employee side. These elements will be discussed further within this section.

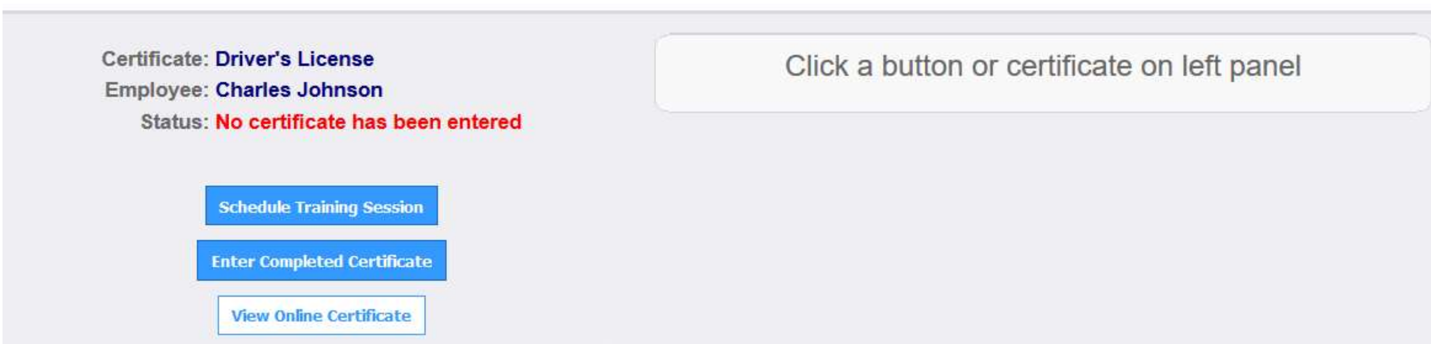
Admin Uploading:

1. For an administrator to upload certificates on behalf of an employee, simply navigate to **Admin > Training > Certificate tracking**. From here, select the specific certificate you would like to upload (for demonstration purposes Drivers License was selected).



S.No.45

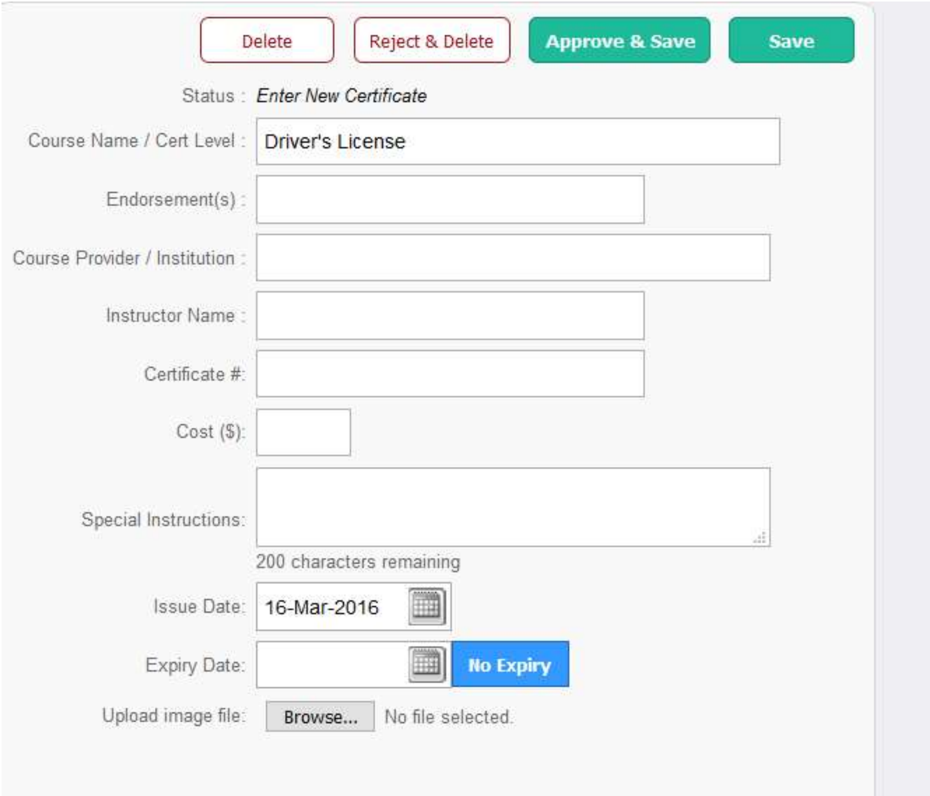
2. Next, select the employee name for whose certificate you'd like to upload. In this example, Charles Johnson was chosen as per diagram S.No.45. We can see this certificate is required for his position but that he is not yet compliant.
3. Next we will see a page similar to that of S.No.46 diagram.



S.No.46

4. From here, choose '**Enter Completed Certificate**'. Next, utilize the '**Browse**' button to upload a copy of the certificate. From here, **you must enter the issue and expiry date for the certificate** as well as any additional criteria. Once '**Saved**' the certificate should be approved by management to ensure validity. Alternatively, you may choose '**Approve & Save**'. See diagram S.No.47 below.

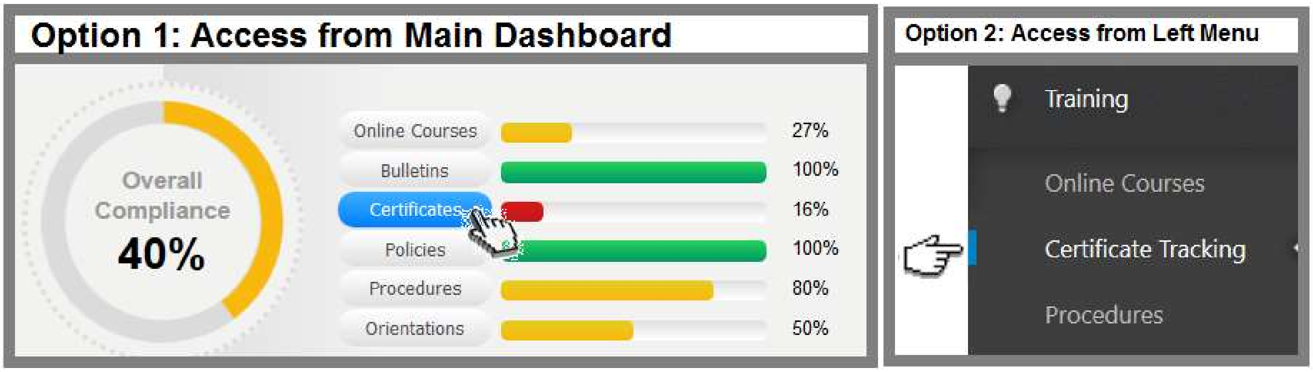
Note: When the certificates are entered with their expiration dates, they are flagged as Current (Up to date), Coming Due or Past Due on the users dashboard. Notifications may also be received via email for the employee and their supervisor depending on whether or not this component is active. You would utilize this function to track your workers compliance with reference to valid certificates.


Delete
Reject & Delete
Approve & Save
Save
Status : Enter New Certificate
Course Name / Cert Level :
Driver's License
Endorsement(s) :
Course Provider / Institution :
Instructor Name :
Certificate #:
Cost ($):
Special Instructions:
200 characters remaining
Issue Date:
16-Mar-2016
Expiry Date:
No Expiry
Upload image file:
Browse...
No file selected.
S.No.47

Employee Uploading

Another great feature of the system, is that Employees can upload their own certificates if provided the appropriate permissions. To upload a certificate from 'My Portal' as an employee, please complete the following steps:

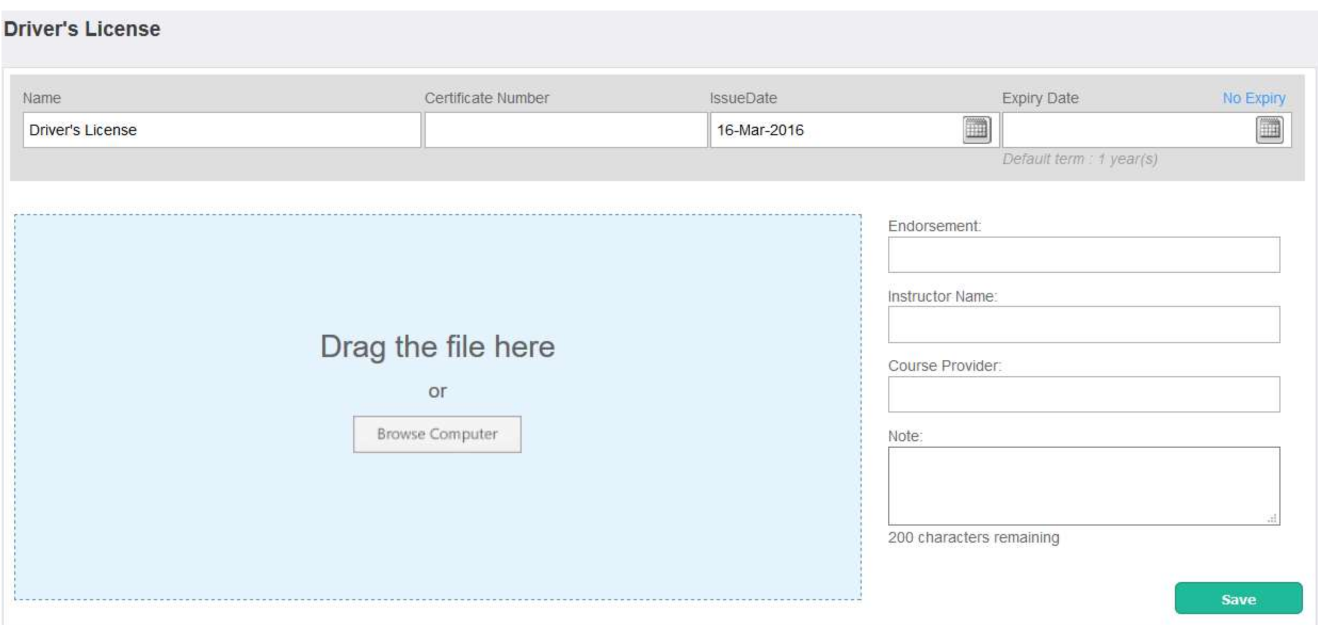
1. Navigate to 'My Portal' (main login page once signed in)
2. Diagram S.No.48 identifies 2 ways in which an employee may access and update their certificates



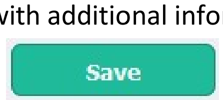
S.No.48

3. Once your next page loads, you will be required to select the specific certificate from the list that you'd like to upload.
4. Whether you had a pre-existing (expired) certificate in this section, or no other certificate was ever uploaded, you will need to choose 

in order to effectively attach your certificate.



S.No.49

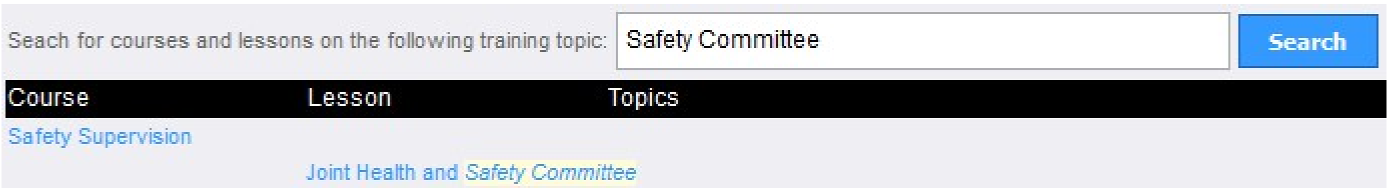
5. As displayed in Diagram S.No.49 You must choose 'Browse Computer' or drag-and-drop your certificate into the appropriate area along with additional information including Endorsements, expiry/issue date, instructor information etc. Choose 

once complete.

Step 7: Training Courses

Assignment

Navigate to **Admin > Training > Online Courses** to view our constantly growing available course list. If you don't see a course here you would like, use **'Search Topics'** on the top of the page to search phrases to find content similar to your criteria to identify the course you may be looking for. Diagram S.No.24.



S.No.24

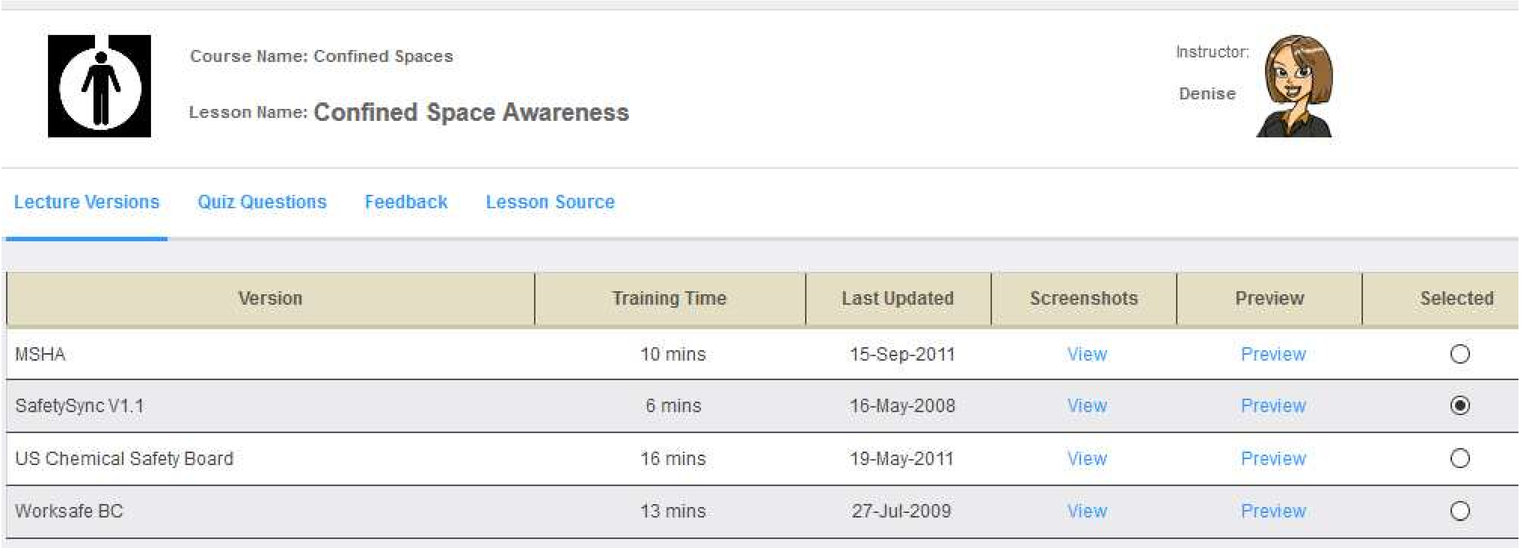
- To assign a course as *Optional* or **Required** for positions, navigate to **'Online Courses'**:
    - Choose your **Course Name**
    - Choose the Sub-Tab **'Positions'**
    - Use bubbles to indicate N/A, Optional, Required & **Save Changes**.
- **Settings under Course:**
    - This settings page lets you choose criteria aside from the default. Here, you can choose when the course will expire, Set your minimum quiz pass score, and many more options specific for this course. This criterion is expanded upon in **Part I: Components.**
- **Employee Compliance:**
    - You may use this search tool to set filters or do a generic search to determine who has or has not yet completed the course as well as the completion date(s).

Modules

Modules act sort of like 'Chapters' for each course. Each course may have 1 module or multiple modules depending on the content. Additionally, in some cases you may choose different available versions of a module if you are unsatisfied with the default version provided.

Take the steps below to ensure you have the most preferred module content selected and available for viewing by personnel.

1. **Navigate into any course** (For example purposes, the 'Confined Spaces' course will be used)
2. **Choose a module** for that course by selecting the module (For example purposes the 'Confined Space Awareness' module will be used).
3. Next you will be taken to a page that looks like the one displayed in S.No.25 with options at the top including **'Lecture Versions'**.



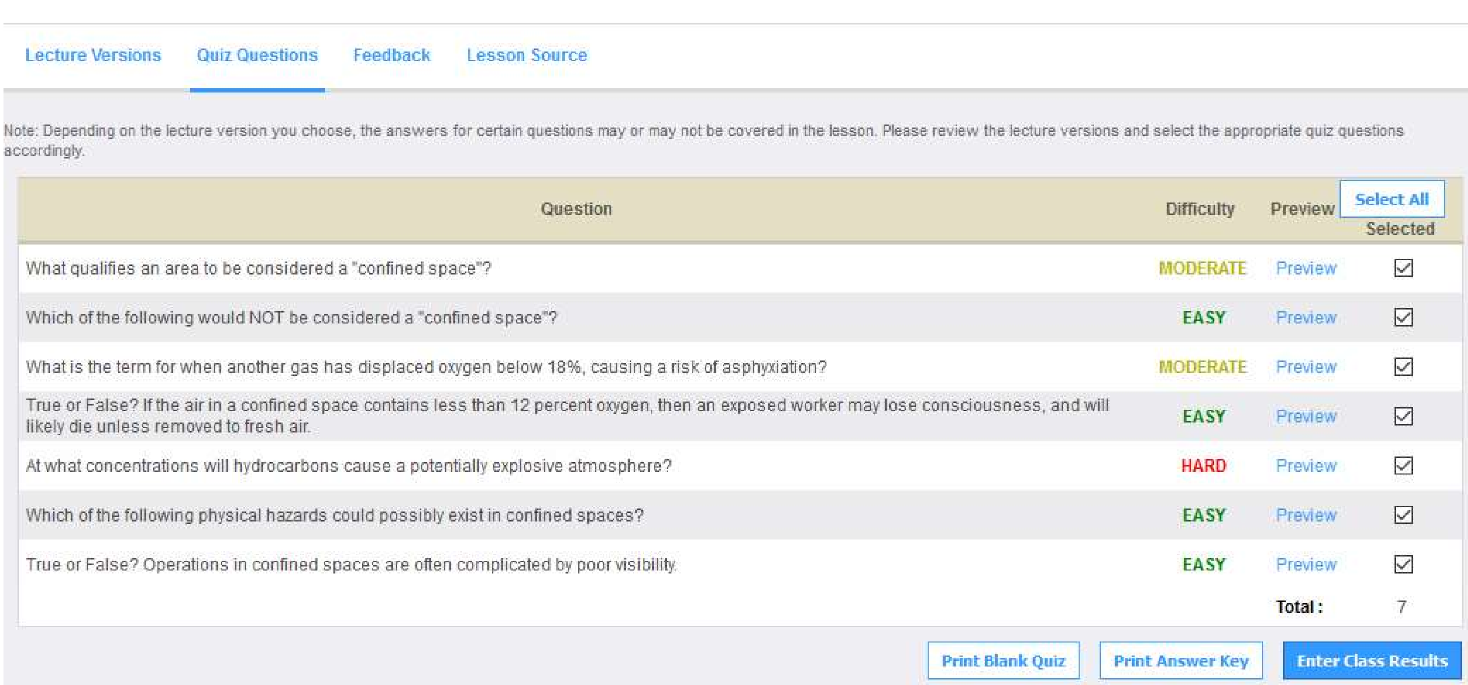
S.No.25

From here, you may **'View'** (if available) or **'Preview'** the course to determine the version you prefer best. The 'Version' text explains the source of where the content came from. You may use the bubble to select a different version of the specific module for the course & **Save Changes**.

Quiz'

Still within the same Page for your specified module (Example: Confined Space Awareness > Quiz Questions), select the Sub-Tab **'Quiz Questions'**.

Many times employees who utilize SafetySync complain that questions may not be challenging enough. This is a problem that is easily resolved via the 'Quiz Questions' tab. This tab is specific to the module/chapter for the course you have chosen. By default, SafetySync chooses certain questions to be asked on the associated Quiz'.



S.No.26

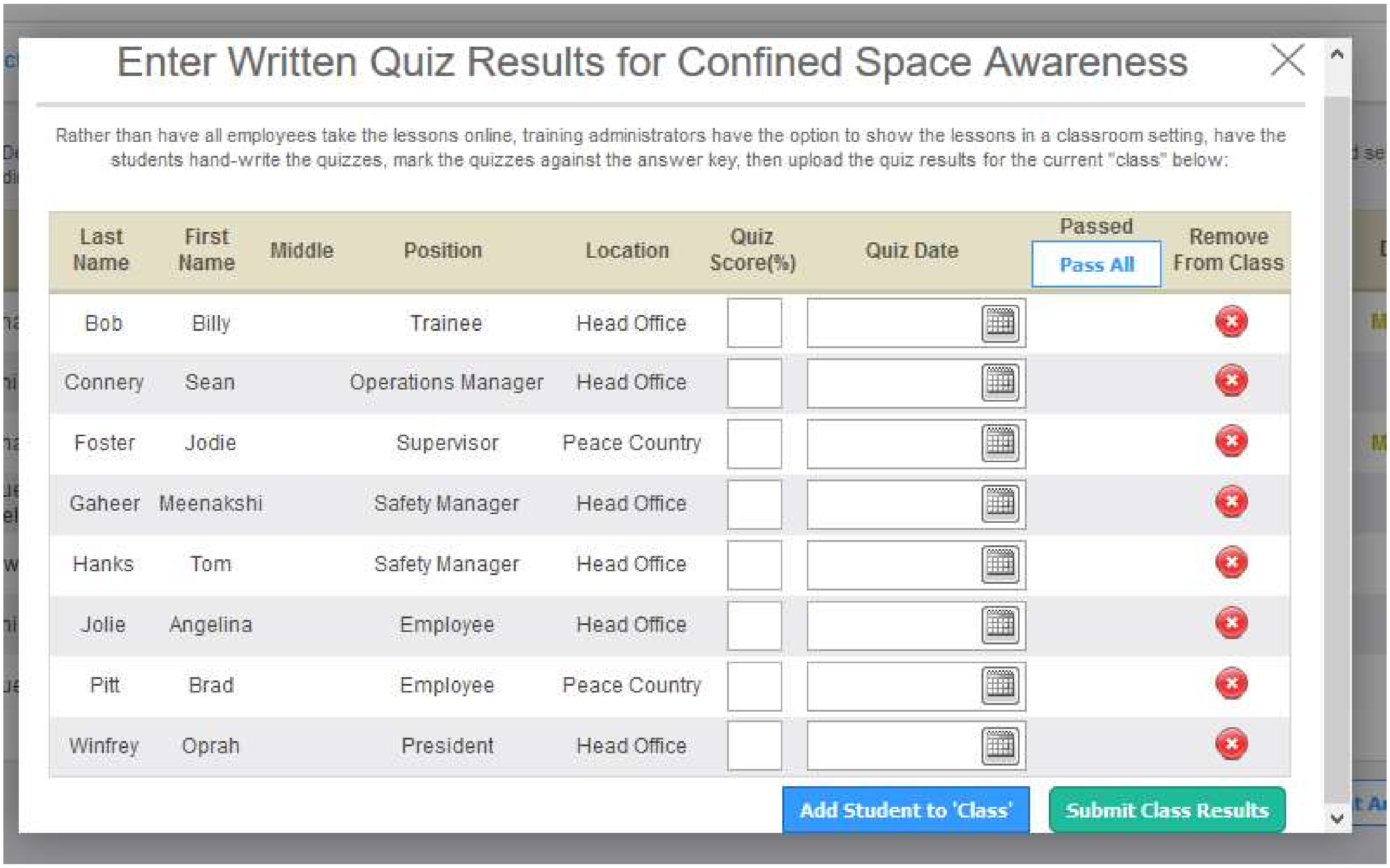
From Quiz Questions, you may Select or De-Select appropriate questions (Only accessible to Administrator).

These quiz questions are rated as **Easy**, **Moderate** or **Hard** based on the number of Correct or Incorrect responses chosen on average for all SafetySync users which may assist with assignment of questions. **'Save Changes'**.

- **Feedback Sub Tab**
  - This page outlines general feedback received on the particular module.
- **Lesson Source Tab**
  - This page identifies where the content is derived from and allows you to 'Report Broken' links to lessons that may be malfunctioning or not appearing as intended.
- **Print Blank Quiz**
  - This allows you to access a blank PDF copy of the associated quiz for employees who may prefer to print and complete the hard-copy quiz.

- **Print Answer Key**
  - This allows you to access a PDF which you may print which outlines the questions and correct answers for the particular modules Quiz.

- **Enter Class Results**
  - See Diagram S.No.27. This page allows you to enter in the written quiz results for the appropriate module. If your employees name is not displayed, choose 'Add Student to Class' to search the employee name and 'Add Selected Employee'. This will then allow you to **indicate the Quiz score, Quiz date** and **'Submit Class Results'.**
  - Hint: It is recommended that your completed hard-copy quiz' be sent into your Records section in SafetySync as proof of completion to back-up your input quiz scores OR to be kept on file for at least 3 years.



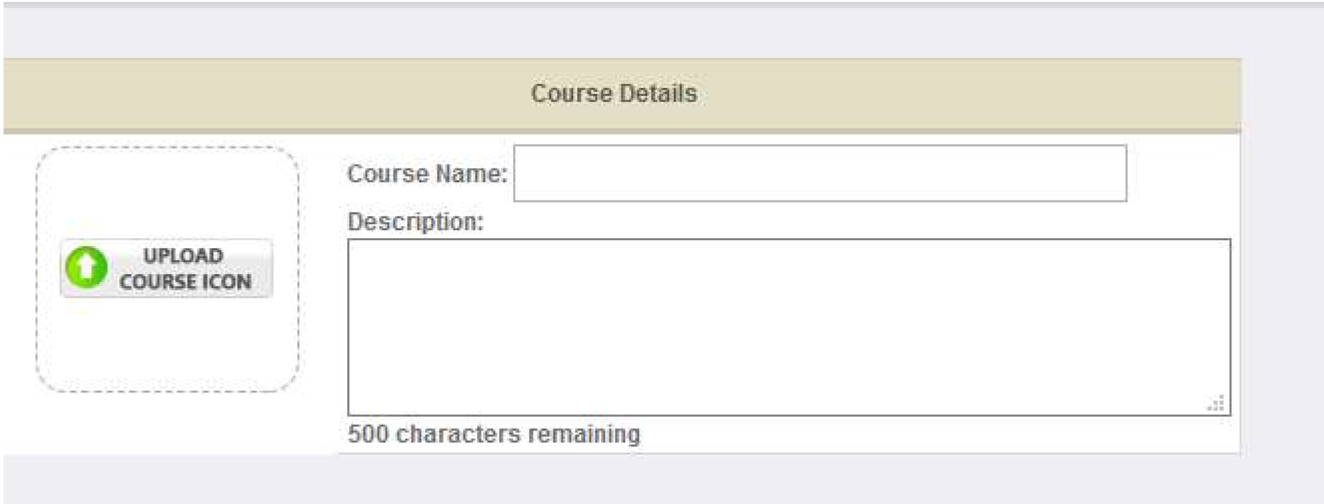
S.No.27

Custom Courses

Another exciting feature offered within SafetySync's Online Safety Management System includes Custom Courses that your company Administrator may complete to demonstrate OTJ Training (Job Tasks) or any other type of training via personalized videos or PDF's.

To build a custom course, navigate to **Admin > Training > Online Courses > Custom Courses > Create New Course**.

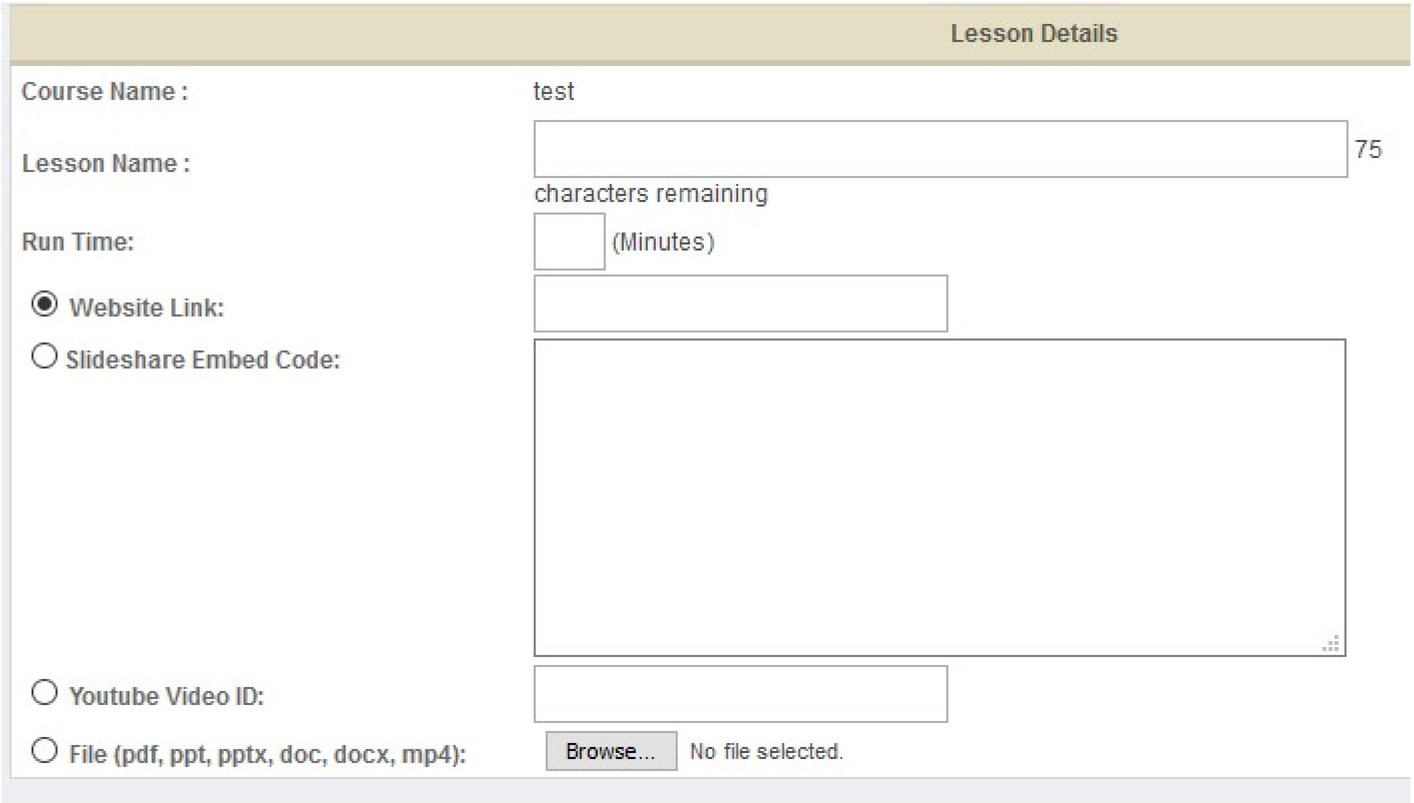
1. To get started, you'll want to **Upload Course Icon**, Provide a **course name** along with a brief **description**. Once this information is entered, we may begin including modules within this course. **Save Changes**.



S.No.28

- *Tips for Creating Courses:*
    - *Courses are meant to contain multiple lessons on a general topic*
    - *Once created, you can set options for your custom course in the Courses tab*
    - *The image you upload here will appear on the wallet card/certificate*

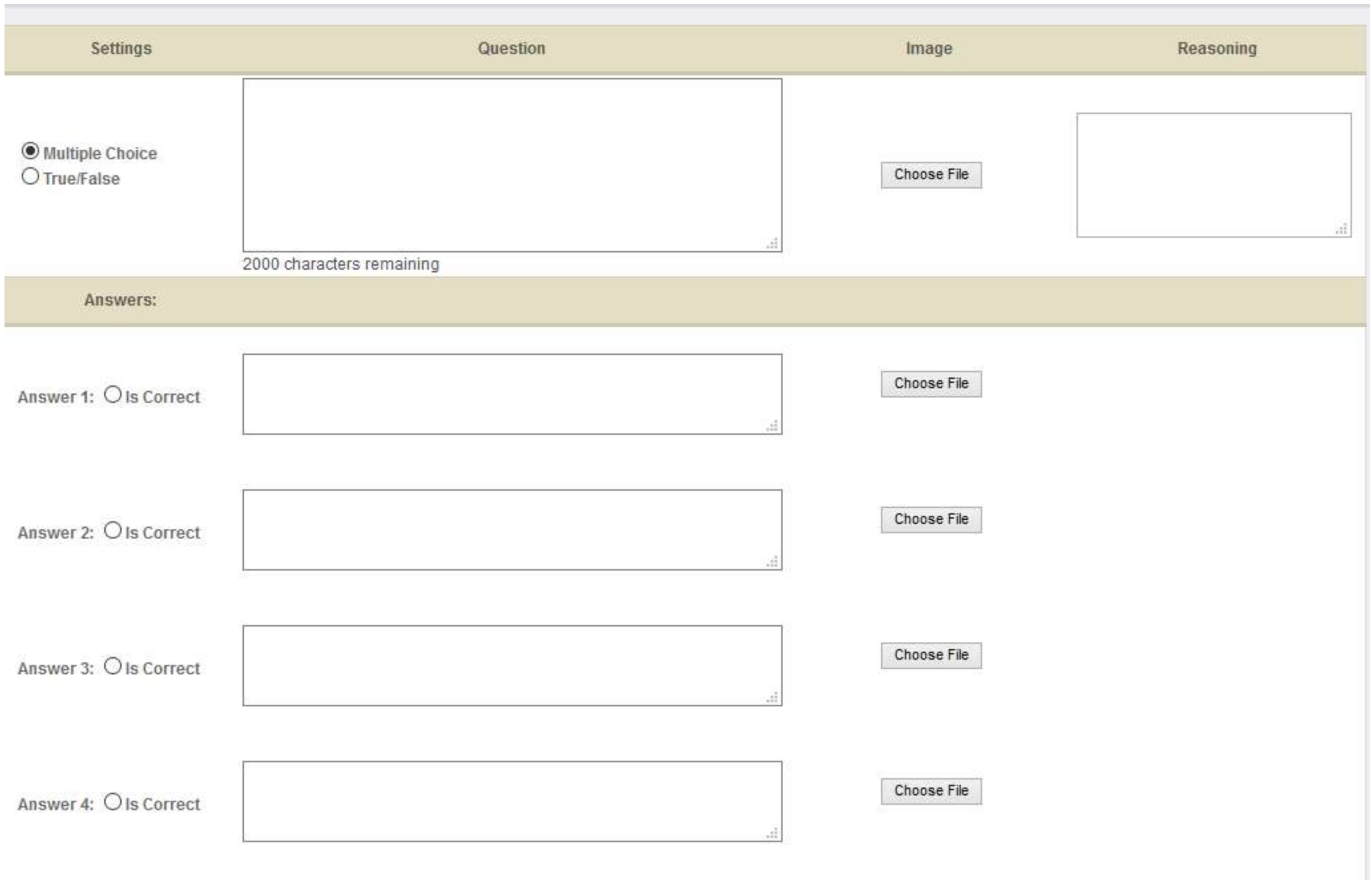
2. Next, select **'Create New Lesson'** to create your first course module/chapter. Here you'll need to enter your **Lesson Name**, **Run Time and choose your method of upload**:
    a. **Website Link:** Simply paste your website link for material you want reviewed prior to a quiz being taken.
    b. **Slide Share Embed Code:** Simply paste your Slide Share Embed Code in this section for material you want reviewed prior to a quiz being taken.
    c. **YouTube Video ID:** 12 digit string after v= in the URL under Sharing options e.g. TdoAYC1EGJ8
    d. **File:** A file may be uploaded from your computer. Available upload formats include: PDF, PPT, PPTX, DOC, DOCX, and MP4.
    e. **Save Changes**



S.No.29

- *Tips for Creating Lessons/Modules:*
  - *When asked for the Run Time of a file you are uploading, simply estimate the time needed to review the file*
  - *Try to divide up large PowerPoint presentations into 30 slides or less per lesson*
  - *We recommend keeping videos under the 15 minute range to help with memory retention*

3. Next, Choose **'Create New Question'** to begin creating a list of questions associated with this lesson/module
   a. **Type**: Select whether your question is either Multiple Choice OR True/False
   b. **Question**: Include your question in this box, up to 2000 maximum characters. You may also provide a **'Reasoning'** explanation to give credibility as to why the correct answer is what it is.
   c. **Answers**: You must select which of your option answers shows the correct answer based on what you have written for the answers.
   d. ***Optional****:* you may add images to this section as well. For example, you might want to add images if your question asked 'Which of the following symbols verifies that PPE is industry approved?' Images in this instance may be added to the corresponding answer(s) using **'Choose File'**.



S.No.30

After your first question is created, you may continue adding questions using the 'Create New Question' button which will be visible once your first question is saved.

**Step 8: Components

Now that you understand the basic functions and capabilities of the online system, it is critical to review your 'Components' and ensure appropriate Defaults are selected before moving on to further detail in **Part II**. Navigate to Admin > Monitoring > Components.

Because there are so many options under this section, it is critical to read and review the description that each of the components elements may offer. To demonstrate, we will simply review a few of the most commonly used settings outlined below.

Safety System Monitoring

This page outlines the frequency with which you would like Employees notified of compliance reminders for themselves. Also, the frequency with which your supervisors receive their Subordinate compliance reports, all which demonstrate System compliance with Course, Policies, Procedures, Valid certificates, Employee Reminders and much more!

Note: Part II Reviews adding workers to SafetySync, Please see this section to review how to assign supervisors specifically to personnel in order to ensure correct assignment and generation of subordinate compliance reports.

Example of compliance reminder S.No.31:

S.No.31

Policy Distribution and Acknowledgement

This page allows us to choose Defaults for the system with regards to system reminders. For example, we may assign specific extra time to review certain policies or procedures but this page allows us to choose the overall, default, minimum amount of time staff must review all other Policies, expiry of policies, Safety Points/Rewards (Discussed further in Part II) and much more.

Equipment Tracking Components

If your company does not own any equipment, you can go here to de-select that item from appearing in the administrative menu.

(M)SDS Components

If you do not have any chemicals present what-so-ever in your office, you may navigate to this place in order to turn the feature off entirely. Note: It is critical to include MSDS for any cleaners, Inks/toners, etc. that may be used in an office. Safety Data Sheets must be available for any possibly hazardous chemicals.

Safety Awareness Training

This components section allows us to select criteria pertaining to training courses including:

Q1) How long after passing a quiz should a training record expire? A) 1-5Years or Never.

-Q2) Can employees challenge quizzes without having to view the lessons first? A) Yes/No

- Enable/Disable Quizzes and much more!

As always, Save changes any time you change any of these elements!

Summary

SafetySync would like to take the time to thank you for reviewing **Part I: Introduction to System Tools.** We hope that with practice and guidance, your company will utilize SafetySync to its full capabilities and make it an integral part of your safety program. **Part II: Assigning criteria post-setup** goes into further detail of additional system tools once Part One is effectively understood. For any questions, comments or concerns, you may contact customer support at: **1.888.668.6403 or support@SafetySync.com.**