# Table of Contents

1 Background ........................................................................................................................................... 4
   1.1 About Outreach Portal .................................................................................................................. 4
   1.2 Access to Outreach Portal ............................................................................................................. 4

2 Getting Started ...................................................................................................................................... 4
   2.1 Entering Outreach Portal .............................................................................................................. 4

3 Outreach Portal Main Page – Top Menu Bar ........................................................................................ 5
   3.1 Main .............................................................................................................................................. 5
   3.2 OSHA.gov ...................................................................................................................................... 6
   3.3 Fact Sheet ...................................................................................................................................... 6
   3.4 Contacts ........................................................................................................................................ 7
   3.5 User Guide .................................................................................................................................... 7
   3.6 Policies & Procedures ................................................................................................................... 7
   3.7 E-Verify .......................................................................................................................................... 7

4 Outreach Portal Main Page – Bottom Banner ...................................................................................... 8
   4.1 Main .............................................................................................................................................. 8
   4.2 Verify a Wallet Card ...................................................................................................................... 8
   4.3 Contact .......................................................................................................................................... 8

5 Outreach Portal Main Page – Add Outreach Report ............................................................................. 8
   5.1 Add Program Report Page ............................................................................................................ 8
   5.2 Exception Request ...................................................................................................................... 10
   5.3 Add Topic Hours Page ................................................................................................................. 11
   5.4 Add Students Page ...................................................................................................................... 12
   5.5 Students Confirmation Page ....................................................................................................... 12
   5.6 Request Cards Page ..................................................................................................................... 12
   5.7 Pay for Cards Page ...................................................................................................................... 13

6 Outreach Portal Main Page – Check Submitted Outreach Reports .................................................... 14
   6.1 Icon Legend ................................................................................................................................. 14
   6.2 Paid ............................................................................................................................................... 15
   6.3 Voided ........................................................................................................................................... 15
   6.4 Entered Report Detail View ........................................................................................................... 15
<table>
<thead>
<tr>
<th>Section</th>
<th>Title</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>6.5</td>
<td>Pay for Cards</td>
<td>15</td>
</tr>
<tr>
<td>6.6</td>
<td>Flagged</td>
<td>15</td>
</tr>
<tr>
<td>6.7</td>
<td>Deleted Report</td>
<td>16</td>
</tr>
<tr>
<td>6.8</td>
<td>Submitted Report Page</td>
<td>16</td>
</tr>
<tr>
<td>7</td>
<td>Outreach Portal Main Page – Replacement Cards</td>
<td>17</td>
</tr>
<tr>
<td>7.1</td>
<td>Pay for Replacement Cards Requested</td>
<td>17</td>
</tr>
<tr>
<td>7.2</td>
<td>Requested Replacement Card Report Summary Page</td>
<td>18</td>
</tr>
<tr>
<td>7.3</td>
<td>Request Replacement Cards</td>
<td>19</td>
</tr>
<tr>
<td>8</td>
<td>Frequently Asked Questions (FAQs)</td>
<td>20</td>
</tr>
</tbody>
</table>
1  Background

1.1  About Outreach Portal
The Outreach Portal is a web-based application that allows authorized Outreach Trainers to submit Outreach Program Reports, manage report data, and submit payment for processing Outreach student course completion cards.

Note: Minor screen changes may take place from time to time and some options may not be available to all users.

1.2  Access to Outreach Portal
Outreach Trainers who have successfully completed a Trainer or Update Course (OSHA500, OSHA501, OSHA502, OSHA503, OSHA5400, OSHA5402, OSHA5600, or OSHA5602) through an OSHA Education Center can be granted access to the Portal.

2  Getting Started

2.1  Entering Outreach Portal

b. Enter your email and password in the top banner to log in to Outreach Portal Main page.
   i. Click the “Log in” button after entering approved email address and password for Outreach Portal.

c. If you have forgotten your password or if you are a new Trainer seeking access to Outreach Portal:
i. Click red “request a password”, “Click Here”, or click “First time users – Click Here to request a password.” to request log in information.

ii. Click the box to enter your email address and click “Send Password” button to reset or receive password. Log in information will be sent to the email address provided.

3 Outreach Portal Main Page – Top Menu Bar

Outreach Portal top banner and top menu bar options are available in all Outreach Portal pages.

3.1 Main

Click “MAIN” in top menu bar to go to Outreach Portal Main page.
3.2 OSHA.gov
Click “OSHA.GOV” in top menu bar to be redirected to the United States Department of Labor OSHA web site (http://www.osha.gov/).

3.3 Fact Sheet
Click “FACT SHEET” to be redirected to see OSHA Fact Sheet for OSHA Training Institute (OTI) Education Centers.
3.4 Contacts
Click “CONTACTS” to be redirected to see OTI Education Centers (OTIEC) Contact Sheet for all OSHA regions.

3.5 User Guide
Click “USER GUIDE” to be redirected to see Outreach Portal User Guide.

3.6 Policies & Procedures
Click “POLICIES & PROCEDURES” to see policies and procedures for Outreach Portal.

3.7 E-Verify
Click “E-VERIFY” to go to E-Verify page.
a. Enter first name, last name, card number, and click “Submit” button to verify an authorized OSHA Outreach Student Completion Card. Middle initial is optional.

4 Outreach Portal Main Page – Bottom Banner
Outreach Portal bottom banner options are available in all Outreach Portal pages.

4.1 Main
Click “Main” to go to Outreach Portal Main page.

4.2 Verify a Wallet Card
Click “Verify a Wallet Card” to go to E-Verify page. See section 3.7 E-Verify.

4.3 Contact
Click “Contact” to see the contact information of your OTIEC.

5 Outreach Portal Main Page – Add Outreach Report
Click “ADD OUTREACH REPORT” to go to Add Program Report page. All Outreach courses taught and course information entered in Outreach Portal must follow OSHA guidelines.

Access to adding a particular course will be temporarily suspended after 3 incorrect attempts in entering course information. Contact your OTIEC administrator if your account needs to be reset.

5.1 Add Program Report Page
a. Course – select from drop down box.
b. **Number of Students** – enter number of students that attended the course.

<table>
<thead>
<tr>
<th>Number of Students</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Course Duration Date Format</th>
<th>Start Date/Time</th>
<th>End Date/Time</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Training Site Name</th>
<th>Street Address</th>
<th>City</th>
<th>Country/Location</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>United States:</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Select State:</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>OSHA Jurisdiction</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Other</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Zip Code:</td>
</tr>
</tbody>
</table>

c. **Course Duration** – enter start and end dates and times for the course by selecting dates from the calendars and times from the drop down boxes.

d. **Training Site** – enter address of training site and select location along with corresponding state, jurisdiction, or specify other type of location of training site.

i. Drop down boxes for states in United States, OSHA jurisdiction, or text box for Other will appear after you have made the site location selection.

e. **Course Information** (check all that apply) – select language used for course instruction, if translator was present, if course was taught to youth 18 years old or younger, and if training was part of an OSHA alliance or partnership.

<table>
<thead>
<tr>
<th>Course Information (check all that apply)</th>
<th>Language:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>English</td>
</tr>
<tr>
<td></td>
<td>Spanish</td>
</tr>
<tr>
<td></td>
<td>Other</td>
</tr>
<tr>
<td>Was a Translator Present</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>No</td>
</tr>
<tr>
<td>Youth (age 18 or less)</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>No</td>
</tr>
<tr>
<td>Is this training part of an OSHA Alliance or Partnership</td>
<td>Yes</td>
</tr>
</tbody>
</table>

f. **Type of Training Site** – select type of training site from list.
g. Sponsoring Organization – select sponsoring organization from list. Drop down box for applicable union affiliation will appear when Labor Union is selected.

![Sponsoring Organization dropdown box]

h. OSHA Outreach Training Program guidelines – click to confirm if the Outreach training course was conducted following OSHA guidelines.

I certify that I have conducted this outreach training class in accordance with the OSHA Outreach Training Program guidelines. I have maintained the training records as required by these guidelines and I will provide these records to the OSHA Directorate of Training and Education (or their designee) upon request. I understand that I will be subject to immediate dismissal from the OSHA Outreach Training Program if information provided herein is not true and correct. I further understand that providing false information herein may subject me to civil and criminal penalties under Federal law, including 18 U.S.C. 1001 and sections 17(g) of the Occupational Safety and Health Act, 29 U.S.C. 666(g), which provides criminal penalties for making false statements or representations in any document filed pursuant to that Act.

I hereby attest that all provided is true and correct.

![OSHA Outreach Training Program guidelines]

i. Check carefully for course information accuracy and read Privacy Act Statement and Paperwork Reduction Act Statement before proceeding.

j. Click “Next: Add Topic Hours and/or Students” button to continue entering course information in the Add Topic Hours page after completing Add Program Report page. Note that after clicking “Next: Add Topic Hours and/or Students” button, names of the students must be entered in order for report to be considered complete. You cannot click the back button. Incomplete reports cannot be edited from “Check Submitted Outreach Reports” option.

![Add Topic Hours and/or Students]

Note: If the report did not meet the number of student requirement or was not submitted within the 30 day time limit, an exception box will appear. The trainer must enter the reason for the exception request in the box provided and click “submit”. If approved, an email will be sent to the trainer. If the box is left empty, it will automatically be rejected.

### 5.2 Exception Request

Click Submitted Reports link and click the flagged report to continue. If the exception is approved, an automated approval email will be sent to the trainer.
5.3 Add Topic Hours Page

Course topics and their requirements vary based on type of Outreach course. Total Hours will be automatically calculated at the bottom of the screen. **Access to adding a particular course will be temporarily suspended after 3 incorrect attempts in entering course information.** Contact your OTIEC administrator if your account needs to be reset. **Note: For 10 hour Construction Industry Outreach Training,** **Focus Four topics must total 4 hours.** Any additional time can be placed under Optional. 10 hour General Industry Outreach Training example:

- Required Topic information – select instruction time for each topic from the drop down boxes.
- Elective Topic information – select instruction time for each topic from the drop down boxes.
- Optional Topic information – select instruction time for each topic from the drop down boxes.
- **Check carefully for course information accuracy before proceeding.**
- Click “Next: Add Students” button to continue entering course information in the Add Students page after completing Add Topic Hours page.
5.4 Add Students Page

Student information can be added to the Outreach Portal by uploading an Excel file or by entering manually.

a. Uploading an Excel file
   i. Click “Choose File” to select Excel file. Excel file must follow specified format.
   ii. Click “Upload XLSX” to upload selected file.

b. Entering information manually
   i. First name and last name fields are required. Middle initial and Suffix fields are optional.
   ii. Names of students will be printed on the outreach cards as they are entered into the portal. Check spelling of the students’ names carefully.

c. Check carefully for course information accuracy before proceeding. Incorrectly entered student information can only be corrected by an OTIEC administrator.

d. Click “Submit” button when you have completed and verified your entry. If you do not complete payment after clicking “Submit” button, you may return to Outreach Portal to pay at a later time. See section 5.6 Request Cards page.

5.5 Students Confirmation Page

To correct incorrectly entered student name, contact your OTIEC administrator.

a. Click “Next: Request Cards for these Students” button.

5.6 Request Cards Page

a. Reach this page from Students Confirmation page or by clicking “Pay for Cards” icon in Submitted Reports List page or by clicking “Pay for Cards” icon in Submitted Report page.
b. Ship student completion cards to Trainer address on file – click “Ship to this address” button next to shipping address to go to Pay for Cards page.
   i. It is possible to have multiple shipping addresses on file for selection.
   ii. Click “Delete” icon to delete unwanted shipping address.

c. Ship cards to a new shipping address
   i. Enter new address and click “Enter New Shipping Address” button.
   ii. Click “Ship to this address” button next to the new address entered to go to Pay for Cards page.

   **Note:** National Resource Center/CPWR will bypass Pay for Cards page and go directly to verify and submit.

5.7 Pay for Cards Page

a. Pay for student completion cards by credit card
   i. Click “Pay For Your Card Order by Credit Card” button to go to Click Here To Pay page.
   
   ii. Click “Click Here To Pay” button in Click Here To Pay page to go to Credit Card Information page.

   iii. Enter credit card number, select credit card type and credit card expiration date from the drop down boxes, and click “>> Continue” button in Credit Card Information page or click “Reset” to clear credit card information entered to reenter credit card information.
Billing address is automatically populated by PayPal and does not need to be changed.

<table>
<thead>
<tr>
<th>Credit Card Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Card Number:</td>
</tr>
<tr>
<td>Cards Accepted:</td>
</tr>
<tr>
<td>Diner’s Club - Visa - Discover - JCB - American Express - MasterCard</td>
</tr>
<tr>
<td>Card Type:</td>
</tr>
<tr>
<td>Discover</td>
</tr>
<tr>
<td>Exp Date:</td>
</tr>
<tr>
<td>09/01/2012</td>
</tr>
</tbody>
</table>

b. Pay for cards by Purchase ID – Purchase ID can be set up for organizations with multiple Outreach Trainers. Contact your OTIEC administrator to set up Purchase ID or for more information.

i. Click “Pay For Your Card Order by Purchase ID” button to go to Purchase ID page.

ii. Enter purchase ID number in the “Enter your Purchase ID” box and click “Click Here To Submit Order” button in the Purchase ID page.

<table>
<thead>
<tr>
<th>Report</th>
<th>Students</th>
<th>Cost</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>5386</td>
<td></td>
<td>5.00</td>
<td>$25.00</td>
</tr>
</tbody>
</table>

Enter your Purchase ID

Click Here To Submit Order

6 Outreach Portal Main Page – Check Submitted Outreach Reports

Click “SUBMITTED REPORTS” to go to Submitted Reports List page.

ADD OUTREACH REPORT

SUBMITTED REPORTS

REPLACEMENT CARDS

6.1 Icon Legend

See icon legend in Submitted Reports List page. Click icon in “View” column to select available action for a submitted course.
6.2 Paid
   a. Click icon in Submitted Reports List page to see selected paid course report entered in Submitted Report page.

<table>
<thead>
<tr>
<th>Course</th>
<th>City</th>
<th>State</th>
<th>Submitted</th>
<th>Paid</th>
<th>Approved</th>
<th>Transaction Id</th>
<th>Institute</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Industry Outreach Training</td>
<td>Arlington</td>
<td>TX</td>
<td>02/04/2014</td>
<td>Yes</td>
<td>Pending</td>
<td>1234567890123</td>
<td>Your OTIEC</td>
</tr>
</tbody>
</table>

   b. See section 6.8 Submitted Report page.
   c. Onetime replacement cards can be requested for paid cards. See sections 6.8 and 7 for replacement cards information.

6.3 Voided
   a. Click icon in Submitted Reports List page to see selected voided course report entered in Submitted Report page.

<table>
<thead>
<tr>
<th>Course</th>
<th>City</th>
<th>State</th>
<th>Submitted</th>
<th>Paid</th>
<th>Approved</th>
<th>Transaction Id</th>
<th>Institute</th>
</tr>
</thead>
<tbody>
<tr>
<td>10 hr General Industry Outreach Training</td>
<td>Arlington</td>
<td>TX</td>
<td>02/03/2014</td>
<td>No</td>
<td>NO</td>
<td>N/A</td>
<td>Your OTIEC</td>
</tr>
</tbody>
</table>

   b. See section 6.8 Submitted Report page.

6.4 Entered Report Detail View
   a. Click icon in Submitted Report List page to see selected course report entered in Submitted Report page.

<table>
<thead>
<tr>
<th>Course</th>
<th>City</th>
<th>State</th>
<th>Submitted</th>
<th>Paid</th>
<th>Approved</th>
<th>Transaction Id</th>
<th>Institute</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Industry Outreach Training</td>
<td>Arlington</td>
<td>TX</td>
<td>02/03/2014</td>
<td>No</td>
<td>Pending</td>
<td>N/A</td>
<td>Your OTIEC</td>
</tr>
</tbody>
</table>

   b. When Pay for Cards icon is also present next to the Entered Report Detail view icon in Submitted Report List page, Pay for Cards option is available in Submitted Report page. See section 6.5 Pay for Cards and section 6.8 Submitted Report page.

6.5 Pay for Cards
   a. Click icon in Submitted Report List page to go to Request Cards page. See section 5.5 Request Cards page.

<table>
<thead>
<tr>
<th>View</th>
<th>Course</th>
<th>City</th>
<th>State</th>
<th>Submitted</th>
<th>Paid</th>
<th>Approved</th>
<th>Transaction Id</th>
<th>Institute</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>General Industry Outreach Training</td>
<td>Arlington</td>
<td>TX</td>
<td>12/05/2013</td>
<td>No</td>
<td>Pending</td>
<td>N/A</td>
<td>Your OTIEC</td>
</tr>
</tbody>
</table>

   b. When Pay for Cards icon is also present next to the Entered Report Detail view icon in Submitted Report List page, Pay for Cards option is available in Submitted Report page. See section 6.8 Submitted Report page.

6.6 Flagged
Data entry error replacement card requests and exception requests require OTIEC administrator approval prior to completion of a report. Approved reports will be flagged.

   a. Click icon in Submitted Report List page to see selected flagged course report entered in Submitted Report page.

<table>
<thead>
<tr>
<th>Course</th>
<th>City</th>
<th>State</th>
<th>Submitted</th>
<th>Paid</th>
<th>Approved</th>
<th>Transaction Id</th>
<th>Institute</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Industry Outreach Training</td>
<td>Arlington</td>
<td>TX</td>
<td>02/03/2014</td>
<td>Yes</td>
<td>YES</td>
<td>000000724602</td>
<td>Your OTIEC</td>
</tr>
</tbody>
</table>

   b. See section 6.8 Submitted Report page.
6.7 Deleted Report
   a. Click icon in Submitted Reports List page to see selected deleted course report entered in Submitted Report page.

   b. See section 6.8 Submitted Report page.

6.8 Submitted Report Page
This page displays details of course entered including trainer, students, course, error(s) if present, note(s) if present, and student cards information. Information displayed is based on status of the submitted report.

   a. Click “Open this report in PDF format for printing” button in the top or the bottom of the page to be redirected to report in PDF format.

   b. When student completion cards have not been paid or when selected course has not been approved, edit shipping option is available. Click “edit shipping” in the “Shipping for cards” section to edit student cards shipping information. See section 5.6 Request Cards page.

   c. When student cards have not been paid, pay for cards option is available. Click “Pay for these cards now” in the “Students” section to pay for student cards. See section 5.5 Request Cards page.

   d. One-time replacement cards can be requested for paid cards. Click to select student completion card(s) to be requested and click “Request Replacement Cards” button in the “Students” section to request replacement cards. See section 7 Outreach Portal Main Page – Replacement Cards for steps to complete payment of replacement cards.

   e. When a request for replacement card is made, it is indicated by a check mark in the Replacement Card column in the “Students” section and “Go to Card Que” option becomes
available. Click “Go to Card Que” button to go to Replacement Card Request Que page. See section 7 Outreach Portal Main Page – Replacement Cards.

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### 7 Outreach Portal Main Page – Replacement Cards

Click “REPLACEMENT CARDS” to go to Replacement Card Request Que page.

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#### 7.1 Pay for Replacement Cards Requested

Replacement cards requested are listed in Replacement Card Request Que page.

- a. Select reason for requesting replacement card from the “Lost or Damaged” drop down box and click “Update” button.

- b. Selecting “Data Entry Error” from the drop down box and clicking “Update” button opens data entry field for corrections.

- i. Data entry error replacement card requests and exception requests require OTIEC administrator approval prior to completion of a report. Approved reports will be flagged.

- c. Correct data entry error and click “Submit”
d. Click “In Cart/Pay Now” button to go to Request Cards page. See section 5.6 Request Cards page for information to complete payment. Only credit cards are accepted for replacement card orders.

7.2 Requested Replacement Card Report Summary Page

Click report detail icon in Replacement Card Request Que page to go to Requested Replacement Card Report Summary page.

a. Name of student is displayed in red when a replacement card is requested for the student.

7.3 Request Replacement Cards

Click “CLICK HERE” in Replacement Card Request Que page to go to Paid Students page.

a. Click arrow icon next to name of student in Paid Students page to request a replacement card in the Submitted Report page. See section 6.8 Submitted Report page.
8  Frequently Asked Questions (FAQs)

1. Who can I contact for assistance with the Outreach Portal?
   Please contact the OSHA Education Center at the University of Alabama at 205-348-4585.

2. What types of Outreach Program courses are available for me to request 10-or 30-hour cards?
   You are able to request 10- and 30-Hour cards using the Outreach Portal for Construction, General, Maritime, and Disaster Site Industries.

3. Who is allowed to use the Outreach Portal?
   Authorized Outreach Trainers whose trainer card(s) are current.

4. What are the most popular features of the Outreach Portal?
   - Outreach cards are preprinted with the Student’s Name, Trainer’s Name, and End Date of the course.
   - The Outreach Portal reduces the amount of errors and administrative functions which correlate with the processing of paper program reports.
   - The Outreach Portal makes it easier for record keeping and faster processing of OSHA Outreach trainer cards.

5. What happens if I enter the incorrect hours for a specific topic?
   If the hours entered are not in accordance to OSHA Outreach Training Program Requirements or Procedures, after three (3) attempts the Trainer will be blocked on the Outreach Portal and will not be allowed to proceed with their request, and will not be allowed to request the same type of cards until they have contacted their Authorizing Training Organization.

6. Will I be able to view ALL requests that are submitted through the Outreach Portal and will this help my recordkeeping for audits?
   All requests submitted through the Outreach Portal will be viewable by the Authorized Outreach Trainer with a summary report of their request. The summary report also includes the student names and the card numbers issued for each student. Although the Portal was designed to help Trainers with their record keeping, Trainers are still responsible to keep the required class records stated in OSHA Outreach Training Program Requirements.

7. If I use the Outreach Portal, how long will it take to receive my Outreach cards?
   The Outreach Portal was designed to make requesting cards simpler for Trainers and also help the OSHA Education Center with administrative functions as well. The Portal will be able to turnaround cards more efficiently through the special features added. If you have not received your cards within the time frame stated in OSHA Outreach Training Program Requirements please contact your OSHA Education Center for support.

8. If I have questions, how can I get support?
   Please contact the OSHA Education Center at the University of Alabama at 205-348-4585.