OUTREACH TRAINING PROGRAM
WWW.OSHACARDPORTAL.COM
Available Features:

- Anyone can access the OSHA Card Portal; however, pre-registered Outreach trainers will be able to log in.
- Without a log in you can:
  - Verify an OSHA Card
  - Pay an Invoice
VERIFYING AN OSHA CARD
VERIFYING AN OSHA CARD

How to Verify an OSHA Card:

• Enter in the Full Name as it appears on the card; be sure to include any suffix, middle name, and punctuation

• Enter in the Outreach Card number, including the dash

• Click the Submit button
How to Verify an OSHA Card:

- The portal will either provide Valid Card or Not Valid once submitted.
- If you receive a Not Valid response and believe it is a valid card, click Verify Another Card.
- Once you’re back to the verification page, re-enter the information from the card.
- Be sure to double check the spelling of the name, including punctuation, and resubmit.
PAYING AN INVOICE
WITHOUT A LOG IN
Without a Log In:

- This feature is designed to be used by a third-party who submits payment for an order placed by an Outreach trainer
  - This is including, but not limited to, accounting departments, military, and educational institutions
- Enter in the **Order Number**. This is found on the Invoice provided by the Outreach trainer
- Enter in the **Billing Zip Code**. This is found on the Invoice provided by the Outreach trainer
- Once the information is entered into the corresponding box, click **Submit**
Submitting Payment:

- After clicking Submit, you will be able to review the details of the order and complete payment with a credit card.
- Only credit card payments may be submitted on the portal. Instructions for submitting a payment with a check are available on every invoice.
- The Shipping Address and Shipping Method cannot be adjusted once the order has been submitted for invoicing.
- If the billing address is incorrect, they can select Use a different Billing Address and make the necessary adjustments.
- Once complete, click Pay Now.
SETTING UP YOUR ACCOUNT
SETTING UP YOUR ACCOUNT

Once a new account has been created, you will receive a New Account Created email from the portal to the address that was provided:

- Only 1 email address per user
- An email address cannot be shared with another user
- Go to www.OSHACardPortal.com
- Click on Forgot Password?

First Time Logging In?
SETTING UP YOUR ACCOUNT

• Input your User Email
• Click *Send Password Reset Email*
• An email with the reset password link will be sent to your email address
• Click on the link, it will prompt you to create a password
SETTING UP YOUR ACCOUNT

• Passwords must be at least eight (8) characters long and contain one of each of the following characters:
  o An uppercase letter
  o A lowercase letter
  o A number
  o A special character (such as $, %, &, etc.)
• Click Submit after entering your new password in both boxes
• After your password is created you can go back to the OSHA Card Portal webpage and log in
ONCE YOU’RE LOGGED IN
Once you’re logged in:

- There are four main tabs: **Home**, **Outreach Classes**, **Students**, & **Orders**
- In the gray box to the right, you’ll find your **Active Credentials, Card Orders, and Training Deliveries**
  
  - **Active Credentials**: A quick view of your current active credentials and their expiration dates
  - **Card Orders**: A quick view of cards that have shipped in the last 2 weeks and cards that are Pending ATO Approval
  - **Training Deliveries**: A quick view of how many students you’ve taught & how many classes you’ve instructed
ONCE YOU’RE LOGGED IN

Mid Atlantic OTIEC

Home | Outreach Classes | Students | Orders

My Tasks

- **Add Class**: Clicking here will start the reporting process for a recently completed class.
- **Request Reprint**: This will take you to the Students tab where you can order a replacement Student Completion Card.
- **My Tasks**: Reports listed in this category need attention before they’re approved.
- **Recent Orders**: A list of your most recent orders and their status.

Recent Orders

<table>
<thead>
<tr>
<th>Order No.</th>
<th>Date</th>
<th>Status</th>
<th>View</th>
<th>Track</th>
</tr>
</thead>
<tbody>
<tr>
<td>320568</td>
<td>12/21/2021</td>
<td>Awaiting Print</td>
<td></td>
<td></td>
</tr>
<tr>
<td>320687</td>
<td>12/14/2021</td>
<td>Awaiting Print</td>
<td></td>
<td></td>
</tr>
<tr>
<td>320565</td>
<td>12/07/2021</td>
<td>Awaiting Approval</td>
<td></td>
<td></td>
</tr>
<tr>
<td>320564</td>
<td>12/02/2021</td>
<td>Awaiting Approval</td>
<td></td>
<td></td>
</tr>
<tr>
<td>320563</td>
<td>11/30/2021</td>
<td>Awaiting Print</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Hi, Jeni

Mid Atlantic OTIEC
What are *My Tasks*?

- Reports listed in this category need attention before they're approved
  - **Awaiting Approval**: Report has been submitted and is waiting for the ATO to review the report
  - **Incomplete Report**: Report was started but was not finished. Click **Complete Report** to add any missing information and submit the report
  - **Order Awaiting Payment**: Report was submitted for invoicing, and the invoice is waiting on payment
  - **Changes Required**: Report was completed, submitted, paid for, and reviewed by the ATO. Click **Revise Report** and make any necessary adjustments and resubmit
  - Classes outlined in yellow have additional information that needs to be addressed
Adding a Class:

- Locate and click the Add Class button found above the My Tasks section.
SUBMITTING A CLASS REPORT

Adding a Class:

- Select from the drop-down list of OSHA Outreach Courses
- Only courses you're authorized to instruct will be listed
- Once you hit **Continue** the report will be started
SUBMITTING A CLASS REPORT

Create Class Report:

- **Report Details:** Shows the progress of the report in *In Progress, Payment Pending, Submitted, Approved,* & *Rejected*
- **Class Details:** Type of Course, Trainer Card Number, Sponsoring Organization, Language Emphasis other than English, and Other Emphasis, such as Youth (age 18 and under)
- **Training Site:** Location Name, Address Type, and Address
- To add a new address, or select from a previous address, click the *Change* button.
SUBMITTING A CLASS REPORT

Change Training Site:

• Under Change you can select from the list of Most Recently Used or Previously Used addresses

• Click Add New Training Site to add a training site not listed below

• Once a site is added, it will be available to select for future class reports

• There is no limit to the number of addresses that can be kept on file
Create Class Report:

- Verify that all the information in the **Class Details** and **Training Site** are correct.
- Scroll down to the next section, **Class Duration**.
SUBMITTING A CLASS REPORT

Class Duration:

- The **Class Duration** is the total time that the students are in class, including all **Topic** hours, breaks, and administrative matters.
- Input the **Class Date**, **Start Time**, and **End Time** for each day.
- Select **AM** or **PM** from the drop-down menu.
- Click **Add Day** if you need to report additional class days.
- If you do not need all the days listed, leave it blank and it will remove them from the report.
- All classes must be **completed within 6 months** from start to finish.
- Scroll down to the next section, **Topics**.
SUBMITTING A CLASS REPORT

Topics:

- 3 topic categories for every report: **Required**, **Elective** and **Optional**
- Topic time must be in decimal format
  - 30 min = 0.5
  - 45 min = 0.75
  - 1 hour = 1.00
  - 1 hour & 15 min = 1.25
- Click **Add Optional Topic** to add additional topics instructed
- Scroll down to the next section, **class roster**
Class Roster:

- Under **Class Roster** you can enter the **Number of Students in Class**, or click the **Add Student** button to add students one at a time.
- Outreach training classes must have no less than 3 students and no more than 40 students per class.
- The student’s name must be their full legal name and should match what appears on a driver’s license or government issued ID.
- Include any applicable suffix for the student, such as, Jr, Sr, II, or III.
- Only students who have completed the full training as indicated by the dates/times/topics above should be included on this report. Makeup students are submitted on their own separate report.
- Once you’re complete, click the **Save & Continue** button to proceed with reviewing the report.
Review Class Report:

- The review page is similar to what the ATO will see while reviewing the report for approval.
- Review each section to ensure that all information is accurate and follows the Outreach Training Program Requirements and Procedures.
- Scroll down to review the next section, **class duration**.

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**Report Details**

<table>
<thead>
<tr>
<th>Report Status</th>
<th>In Progress</th>
</tr>
</thead>
</table>

**Training Site**

<table>
<thead>
<tr>
<th>Location Name</th>
<th>Main Street</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address Type</td>
<td>Workpiece</td>
</tr>
<tr>
<td>Address</td>
<td>123 Main St, Suite A, City, St, 00000</td>
</tr>
</tbody>
</table>

**Class Details**

<table>
<thead>
<tr>
<th>Outreach Course</th>
<th>Construction 10-Hour</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trainer Card No.</td>
<td>00-0000000000</td>
</tr>
<tr>
<td>Sponsoring Organization</td>
<td>None Selected</td>
</tr>
<tr>
<td>Emphasis Language</td>
<td>Spanish</td>
</tr>
<tr>
<td>Other Emphasis</td>
<td>Youth (age 18 and under)</td>
</tr>
</tbody>
</table>

**Class Duration**
Review Class Report:

- Class Duration will list the dates and times provided on the previous page and will now include the **OTPR Submission Deadline** date.

- OTPR stands for Outreach Training Program Report and is one of the required recordkeeping documents. The OSHA Card Portal will generate the OTPR for you from the report that is being submitted.

- All OTP reports must be submitted within 30 calendar days of class completion.

- Scroll down to review the next section, **topics**.
Review Class Report:

- Double check that the topics submitted match the topics provided on the detailed topic outline for the class
- Scroll down to review the next section, class roster
Review Class Report:

- Review the names submitted on the **Class Roster** for accuracy.
- If you’ve found errors that will need to be adjusted, click the **Back** button and make the necessary adjustments.
- Once payment has been made, you cannot add or remove any students.
- **Note to ATO:** Leave a note about the class that the ATO may need to know. Do not provide information about payment or shipping.
  - Shipping is an automated process and cannot be adjusted by the ATO.
  - The report cannot be viewed until payment has been made. If you have updates about payment, please email the ATO.
- Click **Add to Cart** to proceed.

### Class Report

<table>
<thead>
<tr>
<th>Count</th>
<th>Student Name</th>
<th>Total Count: 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Student N. Three</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Student Two, Jr.</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Student One</td>
<td></td>
</tr>
</tbody>
</table>

### Note to ATO

Use this area if you need to provide additional information about this Outreach Training Program Report to your Authorizing Training Organization. The notes entered here are for the ATO only and will not be recorded on your official 9018 program report.

Leave a note here for the ATO to read. Example: "A student missed the second day of class, they attended a minimum of 50% of the class and will be making up the second day at a later date. A report will be submitted for that student once the make-up day is complete."
Statement of Certification:

- All reports must have a **Statement of Certification** on File.
- By clicking **Confirm** you certify that you conducted the Outreach Training Program Class in accordance with the OSHA Outreach Training Program Requirements and Procedures.
- Click **Confirm** to proceed with payment.
COMPLETING THE CHECKOUT PROCESS
Shopping Cart:

- Once the Statement of Certification is confirmed, the report will move into the **Shopping Cart**
- **Item Summary**: A breakdown of the different items in the cart
- **Order Summary**: The total cost of all items in the shopping cart, minus shipping
- If you have more than one report, or a replacement card request to submit on the same invoice, click **Add More** to add to the order
  - **Please note**, invoices must be paid in full and cannot be split between multiple payment methods
- Once all items have been added, click the **Checkout** button to proceed with payment
Shipping Address:

- The **Shipping Address** will be pre-filled in with the address provided in your account settings.
- The shipping address should be the *home or business* address of the primary Outreach trainer.
- Click **Continue** to select a shipping method.
Shipping Method:

- **USPS First Class with Tracking Info**: Provided at no additional cost. Arrives in 7-10 business days.
- **FedEx Express Saver (3-day)**: Additional cost varies by location and quantity of cards. Arrives in 3-4 business days.
- **FedEx 2Day**: Additional cost varies by location and quantity of cards. Arrives in 2-3 business days.
- **FedEx Standard Overnight**: Additional cost varies by location and quantity of cards. Arrives in 1-2 business days.
- Expedited (FedEx) orders approved by the ATO by 2:00pm EST are shipped the same day.
- Choose shipping method and click **Continue** to proceed with payment.
COMPLETING CHECKOUT PROCESS

Payment Method - Pay Now:

- If making a payment by credit, enter in the credit card information in the **Payment** section.

- The **Shipping Address** is selected as the default **Billing Address**; however, this can be changed by selecting **Use a different Billing Address** and filling in the alternate **Billing Address** information.

- Click **Pay Now** and the report will be instantly submitted to the ATO for review.
Payment Method - Pay Later:

- If you would like to request an invoice, select **Pay Later** in the **Payment** section.

- The **Shipping Address** is selected as the default **Billing Address**; however, this can be changed by selecting **Use a different Billing Address** and filling in the alternate **Billing Address** information.

- The **Billing Address** can be adjusted by the person who is submitting payment.

- The **Ship To** address and **Shipping Method** can only be adjusted by the Outreach trainer and not a 3rd party submitting payment.

- Click **Submit** to generate an invoice.
COMPLETING CHECKOUT PROCESS

Pay Later Confirmation:

• By selecting to Pay Later, an invoice will be created for this order and your order will remain in *Awaiting Payment* status until payment is received.

• Orders *Awaiting Payment* are not considered submitted; payment must be completed within 30 days from the last day of class to remain in compliance with the program requirements.

• Orders *Awaiting Payment* cannot be reviewed by the ATO, and will not be visible until payment has been received.

• Click **Confirm** to generate the invoice.
Invoice Confirmation:

- A copy of the Invoice will be emailed to you
- Click Pay Online to submit a payment with your credit card
- Click Email the Invoice to send an email directly from noreply@oshacardportal.com to someone else
- Click Invoice to download a PDF copy of the invoice
COMPLETING CHECKOUT PROCESS

PDF Invoice:

- From Google Chrome, clicking Invoice will open a new window
- Click Download to download a copy of the invoice to your computer
- Click Print to print a copy of the invoice to your printer
EDITING YOUR ACCOUNT
My Account

- In the top right corner, click on the greeting that says **Hi, Xxxx**
- This will bring up a dropdown menu, select **My Account** to view and edit your account information
User Properties:

- Information under **My Account** is must remain up to date
- **Basic Information**: Your full legal name, company, and a phone number where the ATO can reach you directly
- **Account Information**: The email address you will utilize to log into your account. This can be updated at any time
- **Credentials**: A list of current and past credentials. A replacement Outreach trainer card can be requested if the credential is **Valid**
- Scroll down to view the next section, **OSHA Specifics**
OSHA Specifics:

- This section is utilized to publish yourself to OSHA.gov list of Outreach Trainers
- Click the check box to activate
- Add any websites or languages
- OSHA.gov will also publish the email address and phone number listed on your account
- The Opt-In trainer list is submitted to OSHA at the end of each month and should be uploaded by the 15th of the following month. If you do not see your information after the 15th of the following month, please reach out to your ATO
- Scroll down to view the next section, Shipping Address and Billing Address
Account Addresses:

- **Shipping Address**: This is the address that will default for all OSHA Card Portal orders. This will also be the address that any communication from the ATO will be sent to.

- **Billing Address**: This can be the same as the Shipping Address by clicking the check mark at the bottom or can be a separate address.

- Once any adjustments have been made, click the **Save** button at the bottom of the page. If you do not click **Save**, the adjustments will revert back.
EXPLORING THE FOUR MAIN TABS
HOME | OUTREACH CLASSES | STUDENTS | ORDERS
EXPLORING THE FOUR MAIN TABS

Mid Atlantic OTIEC

Home:

The highlighted Outreach Class Report has been returned to you for changes and requires you to resubmit.
The highlighted Outreach Class Reports are nearing or have passed the OSHA timeline requirement.

My Tasks

- Awaiting Approval: Class - 12/16/2021 (0d) - Email ATO
- Incomplete Report: Class - 12/07/2021 (21d) - Complete Report
- Order Awaiting Payment: Order - 12/02/2021 (21d) - Pay Invoice
- Incomplete Report: Class - 11/22/2021 (36d) - Complete Report
- Changes Required: Class - 11/09/2021 (49d) - Revise Report

Recent Orders

- Order No. 320588: 12/21/2021 - Awaiting Print - View | Track
- Order No. 320587: 12/14/2021 - Awaiting Print - View | Track
- Order No. 320586: 12/07/2021 - Open Invoice - View | Track
- Order No. 320584: 12/02/2021 - Awaiting Approval - View | Track
- Order No. 320583: 11/30/2021 - Awaiting Print - View | Track

Active Credentials

- General Industry
  - Exp: 11/28/2020
- Construction
  - Exp: 11/07/2023

Card Orders

- Cards Shipped (last 2 weeks): 0
- Cards Pending ATO Approval: 18

Training Deliveries

- Students Trained: 76
- Classes Delivered: 18
EXPLORING THE FOUR MAIN TABS
HOME | OUTREACH CLASSES | STUDENTS | ORDERS
Outreach Classes:

- Use the **Search Box** to search for a specific student’s name
- Classes can be **filtered** by:
  - Class Completed Date
  - Status of Outreach Classes
  - Course Type
- Columns with the light blue arrow can be sorted by **ascending or descending** order
- **View**: This will take you to the Outreach Class review page
- **Order**: This will take you Order information associated with the class; such as, payment and shipping information
- **PDF**: This will download the PDF copy of the OTPR, one of the required recordkeeping documents
Outreach Training Program Report (OTPR):

- The Outreach Training Program Report (OTPR) is one of the required recordkeeping documents and should be downloaded and kept with the class recordkeeping documents.
- Click Download to download the PDF copy of the OTPR to your computer.
- Click Print to print a copy of the OTPR.
EXPLORING THE FOUR MAIN TABS

HOME | OUTREACH CLASSES | STUDENTS | ORDERS
Students:

- Use the **Search Box** to search for a specific student’s name.
- Classes can be **Filtered** by:
  - Class Completed Date
  - Status of Outreach Class
  - Course Type
- Columns with the light blue arrow can be sorted by *ascending* or *descending* order.
- **View**: This will take you to the Student Completion card information page.
- **Request Reprint**: This will take you to the order page to request a replacement card for that student.
EXPLORING THE FOUR MAIN TABS

Request Student Replacement Card:

- Verify that the student information at the top is the card you wish to replace (Name & Card Number)
- Select the Reason for the Request, misspelled or lost/damaged/stolen
- Student completion cards are only eligible for reprint if the class was completed within the last 5 years
- Only one replacement card for lost/damaged/stolen
  - If the student completion card is lost more than once, the student will be required to take the course again
Replacing a Misspelled Card:

- If requesting for a misspelled card, enter in the correct spelling in the box provided.
- The misspelled card must be returned to the ATO at the address provided. The Outreach trainer must check the box that states, *I will return the misspelled card.*
Orders:

- Use the **Search Box** to search for a specific student’s name
- Classes can be **Filtered** by:
  - Class Completed Date
  - Status of Outreach Classes
  - Order Item Type
  - Payment Type
- Columns with the light blue arrow can be sorted by **ascending** or **descending** order
- **Pay**: This will take you to the checkout page to make payment for the order
- **View**: This will take you Order information associated with the class; such as, payment and shipping information
- **Track**: If the order has shipped, this will take you to **USPS** or **FedEx** tracking page. **USPS does not track beyond 120 days**
Questions?