

OUTREACH
PORTAL

Outreach Portal

User Guide

1. What is the Outreach Portal?

The Outreach Portal is a web based application that allows Authorized Outreach Trainers to request 10- and 30- hour student completion cards electronically via the Internet. This portal provides trainers with a personal, easy to use interface that uploads course information and stores data for better recordkeeping.

Who has access to the Outreach Portal?

All Authorized Outreach Trainers that have successfully completed a trainer or update course (OSHA500, OSHA501, OSHA502, OSHA503, OSHA5400 and OSHA5600).

2. Getting Started

2.1 How to locate the Outreach Portal

Visit www.OutreachPortal.com in your web page browser. In the upper right hand corner enter your email address and password to login. First time users must “request a password” by clicking on the red link below the login button.

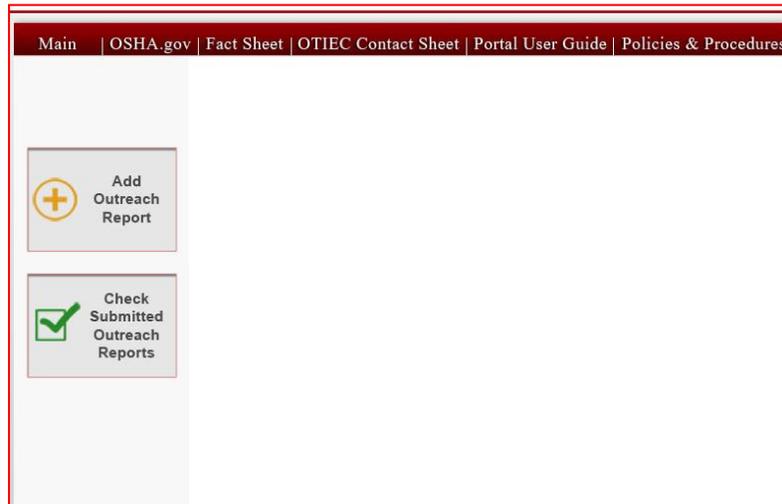
The screenshot shows the OSHA Outreach Training Portal website. At the top left is the logo for Outreach Portal.com. To the right, there is a login section with fields for Email and Password, and a Log in button. Below the login button, a note states: "First time users must request a password to begin submitting card requests." A navigation menu below the login section includes links for Main, OSHA.gov, Fact Sheet, OTIEC Contact Sheet, Portal User Guide, and Policies & Procedures. The main content area features a welcome message, a "Get Started!" section with a link to request a password, and a section titled "OSHA Training Institute Education Centers" which provides information about the program and lists several education centers: Mountain West OSHA Training Center, OSHA Education Center at Arlington, The University of Alabama OSHA Education Centers, and Mid-Atlantic OSHA Education Center.

Tip: For first time users, a password will need to be requested before logging in. You will see a hyperlink, “request password”. Once you click on the “request password” link, you will be asked to enter your email address so a password can be sent directly to your mailbox.

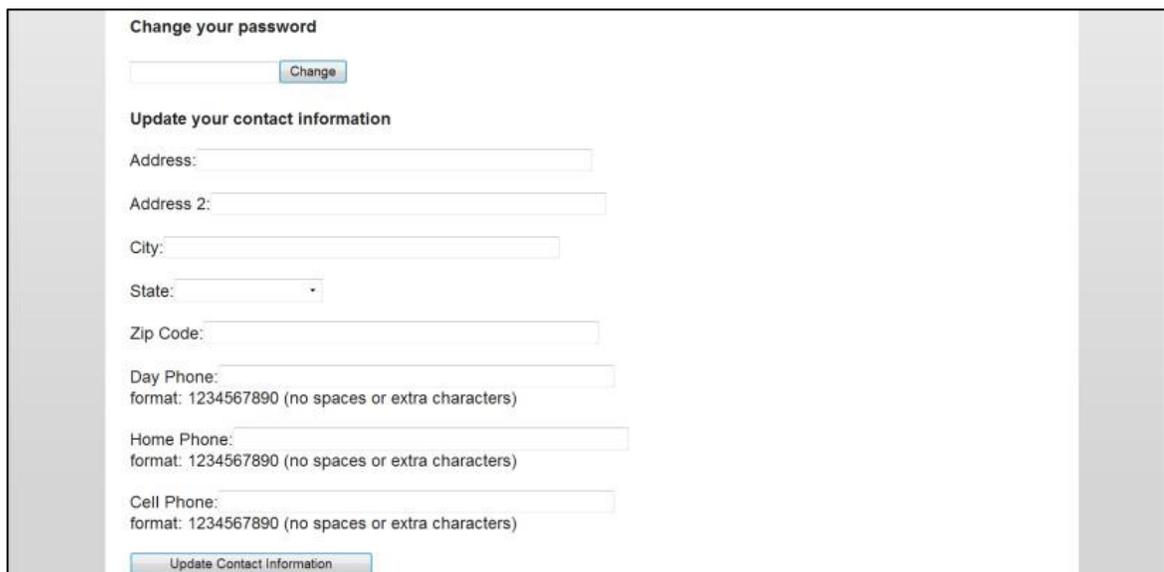
2.2 Main Menu: Basic Page Elements

The Outreach Portal is organized to allow you to easily navigate through your account. The menu consists of the following:

- The **Main Menu** provides a link to your Home page where you have the option to add a program report, view previous program reports, and make edits to your profile information.



- **My Profile** located at the top of the screen will give you the option to change your password and edit your contact information on file.

A screenshot of a user profile management page. The top section is titled "Change your password" and contains a single text input field with a "Change" button to its right. Below this is a section titled "Update your contact information" which contains several form fields: "Address:", "Address 2:", "City:", "State:" (a dropdown menu), "Zip Code:", "Day Phone:" (with a format example "1234567890 (no spaces or extra characters)"), "Home Phone:" (with a format example "1234567890 (no spaces or extra characters)"), and "Cell Phone:" (with a format example "1234567890 (no spaces or extra characters)"). At the bottom of this section is an "Update Contact Information" button.

- **Add Outreach Report** - located on the left hand side of the homepage with a yellow plus sign. This link will get you started in requesting your student completion cards by asking relevant questions regarding your outreach course taught.

- **Check Submitted Outreach Reports** is located on the left hand side directly under the “Add Outreach Report” option with a green check mark. This link will allow users to view all outreach courses requested through our online portal and print a summary report for each outreach report submitted.
 - **View** – An icon legend is located at the top of the screen with the icons that will be listed under the “View” column.



- Will be viewable when a program report has been submitted and paid for.



- Will be viewable when a program report has been submitted but payment was declined/voided.



- Allows trainers to view a summary of their report.



- Will be viewable when a program report has been submitted but a payment has not been received yet. Trainer can click the blue icon and pay for their cards.



- Will be viewable when an incomplete program report has been submitted. This also means a payment was not received

Reports entered before October 1, 2011 are not subject to payment.
Icon Legend: Paid Voided Entered Report Detail view Pay for Cards Incomplete Report Detail View

3. Begin Your Outreach Request

After clicking “Add Outreach Report” you will begin to add your course information, hours, and student names.

3.1 Add Course Information

- Begin inputting the course information regarding your Outreach course taught - such as type of training, number of students, course duration, training site, course information, type of training, and sponsoring organization.

OSHA.gov Fact Sheet OTIEC Contact Sheet Portal User Guide Policies & Procedures FAQs

Add Program Report

Course

Number of Students

Course Duration Start Date/Time End Date/Time

Training Site Name
Street Address
City
Country/Location
 United States
 OSHA Jurisdiction
 Other
Zip Code

Course Information (check all that apply)
Language:
 English
 Spanish
 Other

Was a Translator Present
 Yes
 No

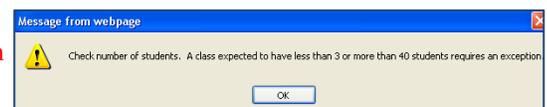
Youth (age 18 or less)

- Once you have answered everything correctly, you will then check the “Statement of Certification” and click “Next: Add Topic Hours”.

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 section 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.

Tip: If any of the questions were not answered in accordance to OSHA requirements and procedures, you will see an error message and will have to reenter any incorrect information.



3.2 Adding Topic Hours

- The “Outreach Topics” page will appear and you will now be allowed to enter all of your hours for each required, elective, and optional topic. Once you have completed everything correctly, click on “Next: Add Students”.

OSHA.gov | Fact Sheet | OTIEC Contact Sheet | Portal User Guide | Policies & Procedures | FAQs

OSHA Outreach Training
Good Evening Trainer 1
My Profile | Log Out

Program Report summary added for **Construction Industry Outreach Training - 10 hour**

Add Outline for Construction Industry Outreach Training 10-Hour Topics.

Required
Hours: 0
Topic: Introduction to OSHA
Focus Four
0 Fall Protection
0 Electrical
0 Struck By
0 Caught in / between
Focus Four Total: 0
Personal Protective and Lifesaving Equipment: 0
Health Hazards in Construction - e.g. noise, hazard communication and silica: 0

Elective
Hours: 0
Topic: Materials Handling, Storage, Use and Disposal
Tools - hand and power
Scaffolds
Cranes, Derricks, Hoists, Elevators, and Conveyors
Excavations
Stairways and Ladders

Optional
Hours: 0
Topic:

Total Hours

Tip: If any of the hours were not in accordance to OSHA requirements and procedures, your error(s) will be highlighted in red.

Main | OSHA.gov | Fact Sheet | OTIEC Contact Sheet | Portal User Guide | Policies & Procedures

Program Report summary added for **Construction Industry Outreach Training - 10 hour**

Add Outline for Construction Industry Outreach Training 10-Hour Topics.

Attempt number: 2

Required
Hours: 1 hr.
Topic: Introduction to OSHA
Focus Four
1 hr. Fall Protection
1 hr. Electrical
1 hr. Struck By
1 hr. Caught in / between
Focus Four Total: 4
Personal Protective and Lifesaving Equipment: 30 min.
Health Hazards in Construction - e.g. noise, hazard communication and silica: 30 min.

Required Total 6 hours
(Less than required hours of 7)

3.3 Adding Student Names

- Now that your course has been entered along with the hours taught, you are ready to enter the student names. Two options are available for inputting student names.

OSHA.gov Fact Sheet OTEC Contact Sheet Portal User Guide Policies & Procedures FAQs

Program Report summary added for 10 hr - Construction Industry Outreach Training
You have entered 3 students. All first and last names required for all students.

Load an Excel file of students into your course report.

Your Excel file must be in the following format:

First Name	Middle Initial	Last Name	Suffix
------------	----------------	-----------	--------

First and Last Name fields are required to have content. Middle initial and Suffix can be left blank.
Do not include any column headers as headers would be regarded as student information and uploaded as such.

Or

Manually Add Students

1 First Name Middle Initial Last Name Suffix

2 First Name Middle Initial Last Name Suffix

3 First Name Middle Initial Last Name Suffix

Tip: The “First Name” and “Last Name” are required fields.

- The first option is to upload an excel sheet with the student’s first name, middle initial, last name and suffix. Do not use titles for any of the columns but make sure Column A is for first names, Column B for middle initials, Column C for last names and Column D for suffixes. See example below. This can be done by clicking **Browse** to locate the file you wish to upload from your local computer. Click **Upload XLSX** to upload file.

Tip: The Excel file must have a file extension of .XLSX, version 2010.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
1	Carrie	L	Smith																
2	Mark		Good																
3	John		Gordon	Jr.															
4																			
5																			

- The second option is to manually type each individual name. The application recognizes the number of students you entered on the first page and automatically pulls the correct number of fields so you can type each student name as you would like it printed on the cards.

Manually Add Students

1 First Name Middle Initial Last Name Suffix

2 First Name Middle Initial Last Name Suffix

3 First Name Middle Initial Last Name Suffix

- After uploading or adding your student names, the next step will be to verify that all the names entered are spelled correctly. If everything is correct, click “Submit” and you will be sent to the next page to verify spelling and request cards for those students.

3.4 Shipping Address

- After your request is complete, confirm the shipping address. If a shipping address is not on file, you will be asked to enter a new shipping address. Once this address is entered it will be stored for future courses.



The screenshot shows the OSHA Outreach Training Portal interface. At the top left is the logo for 'OUTREACH PORTAL.com'. At the top right, it says 'OSHA Outreach Training' and 'Good Evening Trainer 1' with links for 'My Profile' and 'Log Out'. Below this is a navigation bar with links: 'OSHA.gov', 'Fact Sheet', 'OTIEC Contact Sheet', 'Portal User Guide', 'Policies & Procedures', and 'FAQs'. The main content area is titled 'Trainer 1 add a shipping address'. It contains a section 'Add a new shipping address' with the following fields: Address, Address 2, City, State, Country, Zip, and Phone. At the bottom of these fields is a button labeled 'Enter New Shipping Address'.

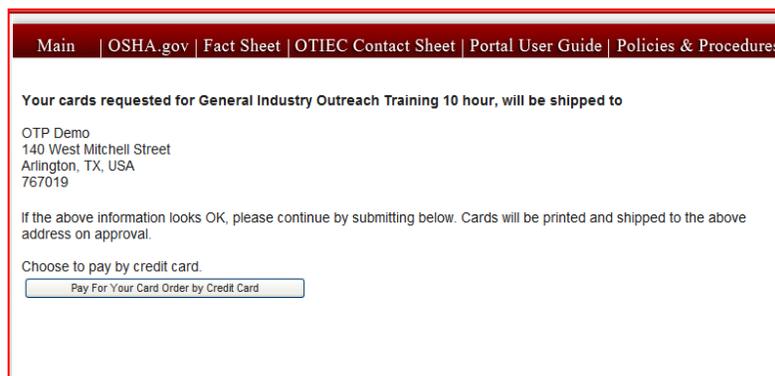
Tip: The shipping addresses can be edited once a report has been requested and paid for as long as the report is not approved yet. Go to “Check Submitted Outreach Reports” view the report you are wishing to edit and you will see “Edit Shipping” next to the address on file.

3.5 Payment

- After your shipping address is confirmed, you will be directed to the payment screen.
 - **Paying for Cards via Credit Card**

3.5 Payment

- After your shipping address is confirmed, you will be directed to the payment screen.
 - **Paying for Cards via Credit Card**



The screenshot shows a payment screen with a navigation bar at the top containing links: 'Main', 'OSHA.gov', 'Fact Sheet', 'OTIEC Contact Sheet', 'Portal User Guide', and 'Policies & Procedures'. The main content area has the heading 'Your cards requested for General Industry Outreach Training 10 hour, will be shipped to'. Below this is the shipping address: 'OTP Demo, 140 West Mitchell Street, Arlington, TX, USA, 767019'. A message states: 'If the above information looks OK, please continue by submitting below. Cards will be printed and shipped to the above address on approval.' At the bottom, it says 'Choose to pay by credit card.' and features a button labeled 'Pay For Your Card Order by Credit Card'.

- Once you click the option to “Pay For Your Card Order by Credit Card” you will be given a report number as a reference along with the number of students entered. A \$5.00 fee will be calculated for each card request, giving you the total amount due.

Report	Students	Cost	Total
662	3	\$5.00	
			\$15.00

[Click Here To Pay](#)

- To complete your order, choose “Click Here To Pay”.
- Enter the required Credit Card information.

Outreach Portal

Credit Card Information

Card Number: *

Cards Accepted: Diner's Club - Visa - Discover - JCB - American Express - MasterCard

Card Type: *

Exp Date: / *

*** Required field**

Please note that we only support the US-English character set. In order to ensure that your transaction is processed correctly, please refrain from using International Characters.



VERIFLY▶

- The last step is to authorize your payment and submit your transaction. Once it is approved you will be given a reference number and the amount charged to your credit card.

Your transaction was approved!

Reference #: VSHN7D500D59

Total Amount: \$15.00

Tip: A detailed receipt for the payment can be printed by choosing “Check Submitted Outreach Reports” from the Main Page, then under the “View” Column click the “Entered Report Detail view” Icon.

- **Paying for Cards via Purchase ID**

- If the option is available to pay for your card order via a Purchase ID and are going to use this option, click “Pay For Your Card Order by Purchase ID”.

Please Note: A Purchase ID is intended for use by Organizations / Companies with multiple Outreach Trainers who purchase Outreach Student Completion Cards via Purchase Order. Please contact your OSHA Training Institute Education Center for more information regarding the Purchase ID.

- You will be given a report number as a reference along with the number of students entered. A \$5.00 fee will be calculated for each card request, giving you the total amount due. You will also enter your Purchase ID No.

Report	Students	Cost	Total
2451	3	\$5.00	
			\$15.00

Enter your Purchase ID

- After choosing “Click Here to Submit Order” the next screen will state “**Submission Successful**”.

Tip: A detailed receipt for the payment can be printed by choosing “Check Submitted Outreach Reports” from the Main Page, then under the “View” Column click the “Entered Report Detail view” Icon.

Frequently Asked Questions (FAQs)

1. 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. Requests for Maritime and Disaster Site Worker Cards will be available soon.

2. Who is allowed to use the Outreach Portal?

Any Authorized Outreach Trainer will be able to use the Portal as long as their trainer card(s) are up to date.

3. What happens if I enter the incorrect hours for a specific topic?

If the wrong hours (hours that are not in accordance to OSHA's requirements or procedures) are entered in the Portal after three attempts, the trainer will not be allowed to proceed with their request and will not be allowed to request the same type of request until they are contacted by the Authorizing Training Organization.

4. 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 online 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 recordkeeping, trainers are still responsible to keep the required class records stated in OSHA's requirements.

5. 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 easier for Trainers but also help the OSHA Education Center with Administrative work as well. With this being said, the Portal will be able to turnaround cards quicker through the special features added.

6. If I have questions, how can I get support?

You may contact your Authorizing Training Organization for questions.