

Oil Sands Safety Association (OSSA)

**Application and Program Submission  
Guidelines  
APSG2014**



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## **1. INTRODUCTION**

### **1.1 Disclaimer**

The information in these Application and Program Submission Guidelines (the “Guidelines”) does not, in any way, create a business or professional services relationship between the OSSA Members and Employees (as hereinafter defined) and the Training Providers, Instructors, any Organization or its employees trained by Training Providers, or any other Organization.

These Guidelines and any Safety Training Standards and Regional Code of Practice (RCOP) are not (and are not intended to be) a guide to the OH&S Act, Regulation and Code and regardless of the guidelines, or in any Safety Training Standards or RCOP, set out herein, or in any Safety Training Standard or RCOP, or any approvals granted by OSSA pursuant to these Guidelines, each reader and user is solely responsible for their own compliance with all applicable Legislation, including but not limited to the OH&S Act, Regulation and Code. The OSSA assumes no obligation to update these Guidelines, its Safety Training Standards or RCOP to provide advice on further developments concerning the topics mentioned herein.

If the OH&S Act, Regulation and Code are amended at any time, such amended requirements shall take precedence over the standards set out in any RCOP or Safety Training Standards. Training Providers shall have an obligation to ensure that they are aware of and comply with the Legislation, including but not limited to the OH&S Act, Regulation and Code, at all times. The occupational health, safety and training of Organizations and their respective employees in the workplace remains the responsibility of each employer and employee.

The OSSA and its employees, agents and contractors, and the Members of the OSSA (collectively the “OSSA Members and Employees”), are not responsible for the contents of these Guidelines, the Safety Standards or any RCOP, for any errors or omissions therein, or for the results obtained from the use of the information contained in these Guidelines, Safety Training Standards, RCOP or for any other training or safety programs that may be developed from the use of the information in the applicable Safety Training Standards or RCOP. Each Training Provider is completely responsible for its own Training Programs. All information set out in these Guidelines and any related Safety Training Standards or RCOP is provided “as is”, with no guarantee of completeness, accuracy, timeliness or of the results obtained from the use of these Guidelines, Training Standards or RCOP. There is no warranty of any kind, express or implied, including, without limitation, warranties of performance, merchantability and fitness for a particular purpose. In no event will the OSSA Members and Employees be liable to the reader, user, Training Providers, Instructors, any Organization or its employees trained by Training Providers, or any other Organization for (i) any decision made or action taken in reliance on the information in these Guidelines, Safety Training Standards, or RCOP, (ii) any consequential, special, or similar damages (including, without limitation, personal injury), even if advised of the possibility of such damages, arising or resulting from the information contained in these Guidelines, Safety Training Standards, or RCOP, or (iii) any violation by such reader, user, Training Providers, Instructors, any Organization or its employees trained by Training Providers or any other Organization of the OH&S Act, Regulation and Code, or any other Legislation.

Certain words, phrases, names, designs or logos used in these Guidelines, Safety Training Standards and RCOP may constitute trademarks, service marks or trade names of the OSSA and its Members. Unless otherwise approved, the display of any such marks or names in these Guidelines, Safety Training Standards or RCOP does not imply that a License has been granted by the OSSA or any of its Members to use such marks or names.

Notwithstanding any other provision in these Guidelines, approval of an Administrative Application Package, or a Training Program Application, or any renewal of a License or review of an Accredited Training Program by the OSSA, is without liability of any kind, and in the sole discretion of the OSSA.

## 1.2 Definitions

**Accreditation** or **Accredited**: authorization, in writing, from OSSA that a Training Program meets the minimum requirements of a particular Safety Training Standard.

**Accreditation Team**: those individuals appointed by OSSA, from time to time, to review and evaluate a Training Program submitted by a Training Provider for Accreditation;

**Accredited Training Program**: a Training Program that has been Accredited by OSSA;

**Administrative Application Package**: has the meaning set out in Section 4.1.1 of the Guidelines;

**Administrative Audit**: the audit of the Training Provider’s Administrative Processes/Policies completed by OSSA in accordance with the process set out in Schedule “N” of the Guidelines;

**Administrative Manual**: means the manual provided together with the Administrative Matrix attached as Schedule “B” of the Guidelines which contains the Administrative Processes/Policies as more particularly set out in Article 5 of the Guidelines;

**Administrative Processes/Policies**: those policies and processes developed and implemented by the Training Provider to assure OSSA of consistent classroom management and content delivery by each Instructor, and which are required for a Training Provider to maintain its License and Accreditation of its Training Programs, including but not limited to those processes and policies set out in Article 5 of the Guidelines;

**Application Fee**: has the meaning set out in Section 4.1.1(d) of the Guidelines;

**Approval Letter**: has the meaning set out in Section 6.3.5(a) of the Guidelines;

**Approved Instructor**: has the meaning set out in Section 1.2.2(a) of Schedule “D” of the Guidelines;

**Approved Instructor List**: has the meaning set out in Section 1.4.1 of Schedule “D” of the Guidelines;

**Board of Directors**: the Board of Directors of OSSA;



**Credential Security Label:** has the meaning set out in Section 1.5 of Schedule “H” of the Guidelines;

**Guidelines:** the guidelines set out in these Application and Program Submission Guidelines (APSG 2014), including the Schedules hereto, as these guidelines may be amended from time to time by OSSA;

**Instructor(s):** employees or subcontractors of a Training Provider who provide instruction and training of an Accredited Training Program on behalf of a Training Provider;

**Instructor Hiring Criteria:** has the meaning set out in Section 1.1.1(a) of Schedule “D” of the Guidelines;

**Instructor Management Policies:** has the meaning set out in in Section 1 of Schedule “D” of the Guidelines;

**Instructor Training Program:** has the meaning set out in Section 1.2.1 of Schedule “D” the Guidelines;

**Legislation:** shall include, without limitation, all present and future, federal, provincial, municipal or other local laws, statutes, ordinances, by-laws, regulations, rules, standards, guidelines, orders, requirements, directives and decisions rendered by any ministry, department or administrative or regulatory agency, relating in any way to the health and safety of workers in the Province of Alberta;

**License:** a non-exclusive license granted by OSSA to an Organization who has been approved as a Training Provider for an Accredited Training Program pursuant to these Guidelines to use, copy and display the OSSA Trademarks and the OSSA Trade Names in connection with an Accredited Training Program;

**License Fee:** has the meaning set out in Section 6.3.5(a)(ii) of the Guidelines;

**Licensing Certificate:** has the meaning set out in Section 6.3.5(a)(iii) of the Guidelines;

**Members:** those Organizations that become enrolled as members of OSSA in accordance with the bylaws of OSSA, and their respective employees, officers, directors, shareholders, ownership groups and successors and assigns, including, without limitation, Shell Albian Sands, Canadian Natural Resources Ltd., Suncor Energy Inc., and Syncrude Canada Ltd.;

**OH&S Act, Regulation and Code:** the *Occupational Health and Safety Act* (Alberta), all of the regulations under the OH&S Act, the Occupational Health and Safety Code (Alberta), and any amendments thereto;

**Organization(s):** any individual, corporation, partnership, firm, joint venture, syndicate, association, government, governmental agency or board or commission or authority, and other forms of entity or organization;

**OSSA:** means the Oil Sands Safety Association;

**OSSA Members and Employees:** has the meaning set out in Section 1.1 of the Guidelines;

**OSSA Trademarks:** means the OSSA trademarks, as set out in Schedule “S” of the Guidelines;

**OSSA Trade Names:** means the OSSA trade names, being “Oil Sands Safety Association” or “OSSA”;

**OSSA Training Program:** a safety training program prepared by OSSA in relation to a particular Safety Training Standard;

**Participant Consent Form:** a form required to be filed out by a Participant for the purposes of obtaining necessary approvals to keep and upload training records into the Training Provider’s database, and for OSSA to be able to collect such Participant information to include in OSSA’s training tracking database provided by OSSA from time to time, as set out in Schedule “Q” of the Guidelines;

**Participant Records:** has the meaning set out in Section 1.1.1 of Schedule “I” of the Guidelines;

**Participant Training Credential:** a credential that is provided by a Training Provider to participants who successfully complete an Accredited Training Program as a proof of proficiency that the participant has successfully completed such program, in the form set out in Schedule “M” of the Guidelines;

**Program Change Process:** has the meaning set out in Section 1.4.1 of Schedule “E” of the Guidelines;

**Program Management Policies:** has the meaning set out in Section 1 of Schedule “E” of the Guidelines;

**Program Review:** a program review of an Accredited Training Program completed by OSSA in accordance with the process set out in Schedule “N” of the Guidelines;

**Program Submission Fee:** has the meaning set out in Section 6.3.1(k) of the Guidelines;

**Regional Code of Practice (RCOP):** a code of practice, endorsed by OSSA and as may be amended from time to time by OSSA, governing the practices, procedures and Safety Training Standards to be followed at the OSSA Member’s respective sites;

**Safety Training Standard:** the minimum acceptable safety training requirements approved by OSSA for a Training Program or an OSSA Training Program, including but not limited to the Fall Protection Safety Training Standard, Fire Watch Safety Training Standard, Elevated Work Platform Safety Training Standard and Confined Space Entry and Monitor Safety Training Standard each in the form set out on the OSSA website at [www.ossa-wb.ca](http://www.ossa-wb.ca), as may be amended, replaced or removed by OSSA from time to time, and such other safety training requirements approved by OSSA from time to time, as may subsequently amended, replaced or removed by OSSA;

**Training Program:** a safety training program submitted to OSSA for Accreditation in relation to a particular Safety Training Standard that will be taught in a classroom setting by an Instructor;

**Training Program Application:** has the meaning set out in Section 6.3.1 of the Guidelines;

**Training Provider(s):** an Organization that has been Accredited by OSSA to deliver either their Training Program(s) or an OSSA Training Program, and who has a License to use the OSSA Trademarks and OSSA Trade Names.

## **2. ADVERTISING**

Notwithstanding any other provision in these Guidelines, all advertising mentioning OSSA Accredited Training Programs must be submitted to OSSA for written approval prior to public release.

## **3. APPLICATION PROCESS**

3.1.1 These Guidelines:

- (a) Provide guidance to an Organization applying to OSSA for a License and to Training Providers applying for Accreditation of a Training Program; and
- (b) Describe the minimum expectations, systems, processes and documentation that must be submitted to OSSA to determine the ability of a Training Provider to deliver their Accredited Training Program(s) in a consistent and quality manner.

3.1.2 All Organizations must successfully submit an Administrative Application Package, as set out in Section 4.1 of the Guidelines, and receive approval from OSSA of such Administrative Application Package prior to submitting a Training Program Application for Accreditation of a Training Program, as set out in Section 6.3 of the Guidelines.

## **4. PART 1 - ADMINISTRATIVE APPLICATION PACKAGE**

### **4.1 Administrative Application Package**

4.1.1 An Administrative Application Package must be in a form acceptable to, or provided by, OSSA and must contain the information required by OSSA, including:

- (a) The completed Administrative Application form attached as Schedule “A” of the Guidelines;
- (b) A completed organization chart describing what roles are in place to manage, oversee and deliver all Accredited Training Programs, specifically setting out:
  - (i) The number of employees your organization employees;
  - (ii) The roles of each of your employees;

- (iii) Who the lead instructor will be; and
  - (iv) Who will be in charge of program development and reviews.
  - (c) The completed Administrative Matrix in the form attached as Schedule "B" of the Guidelines, together with the Administrative Manual;
  - (d) The applicable fee required to be paid as prescribed by OSSA from time to time for the submission of an Administrative Application Package (the "Application Fee"), as set out in Schedule "C" of the Guidelines;
  - (e) Documentation confirming the applicant has the necessary Administrative Processes/Policies in place to ensure consistent, quality delivery of the Training Program, as set out in Article 5
- (collectively referred to as the "Administrative Application Package").
- 4.1.2 Upon OSSA's receipt of a completed Administrative Application Package, OSSA will:
- (a) Log the receipt of the Administrative Application Package;
  - (b) Review the Administrative Application to ensure all documents are complete;
  - (c) Notify the applicant that their Administrative Application Package has been received and is being processed; and
  - (d) Deposit the Application Fee.
- 4.1.3 If OSSA approves an Administrative Application Package, OSSA will notify the applicant, in writing, that:
- (a) Their Administrative Application Package has been approved and that the applicant will be granted a License upon the Accreditation of their Training Program(s); and
  - (b) They can proceed to submit their Training Program Application for Accreditation of their Training Program(s) in accordance with Article 6 of the Guidelines.
- 4.1.4 If OSSA does not approve an Administrative Application Package, OSSA will, in its sole discretion, notify the applicant, in writing:
- (a) That the Administrative Application Package has not been approved; or
  - (b) Of the deficiencies with the Administrative Application Package.
- 4.1.5 If OSSA notifies the applicant of any deficiencies, OSSA will return the Administrative Application Package and its contents to the applicant to update as per the list of

deficiencies. Applicants must advise OSSA in writing of any changes or updates to their previously submitted or approved Administrative Application Package.

4.1.6 Upon updating the Administrative Application Package to address the deficiencies identified by OSSA, the applicant shall be permitted to re-submit such updated application to OSSA for further review. The initial Administrative Application Fee paid by the applicant shall include a maximum of three (3) reviews of the Administrative Application Package, provided that a re-submitted application must be received by OSSA within 30 days of OSSA's last review of the Administrative Application Package. The applicant must pay additional fees, as required by OSSA:

- (a) If a re-submitted application is not received by OSSA within 30 days of OSSA's last review of the Administrative Application Package; or
- (b) For each sequential review of the Administration Application beyond the 3rd review of the Administrative Application Package.

4.1.7 Should a submitted Administrative Application Package remain inactive for more than six (6) months, such application and information on OSSA's file respecting the same will be destroyed by OSSA. Should the applicant wish to re-submit its Administrative Application Package, the applicant must begin the process to submit an Administrative Application Package (as set out in Article 4 of these Guidelines) from the beginning.

4.1.8 Notwithstanding any other provision in these Guidelines, OSSA may, without liability of any kind, and in OSSA's sole discretion approve an applicant's Administrative Application Package.

## **5. ADMINISTRATIVE PROCESSES/POLICIES**

5.1.1 The applicants must have a clear set of Administrative Processes/Policies in place to assure OSSA that their Accredited Training Programs will be delivered consistently by all Instructors. The minimum Administrative Processes/Policies that applicants must maintain and provide to OSSA in the Administrative Manual submitted as part of their Administrative Application Package are:

- (a) Instructor Management Processes/Polices, with the requirements set out in Schedule "D" of the Guidelines;
- (b) Program Development and Management Processes/Polices in accordance with the requirements set out in Schedule "E" of the Guidelines;
- (c) Classroom Management Processes/Polices in accordance with the requirements set out in Schedule "F" of the Guidelines;
- (d) Safety and Equipment Management Processes/Polices in accordance with the requirements set out in Schedule "G" of the Guidelines;

- (e) Records Management Processes/Polices in accordance with the requirements set out in Schedule "H" of the Guidelines;
- (f) Training Records Database Processes/Polices in accordance with the requirements set out in Schedule "I" of the Guidelines; and
- (g) Accredited Program Information for OSSA Processes/Polices in accordance with the requirements set out in Schedule "J" of the Guidelines.

## **6. PART 2 - ACCREDITED TRAINING PROGRAM APPLICATION**

### **6.1 Accreditation**

- 6.1.1 Accreditation is a process utilized by OSSA to determine if a Training Provider's proposed Training Program(s) meet the minimum requirements of the applicable Safety Training Standards.
- 6.1.2 A Training Provider must apply for and receive a separate Accreditation from OSSA for each of its Training Programs.

### **6.2 Prior to Accreditation**

- 6.2.1 Prior to submitting a Training Program Application:
  - (a) The Training Provider's Administrative Application Package must be approved; and
  - (b) The Training Provider must call OSSA to review the submission requirements for a Training Program Application, and if requested by the OSSA, must meet in-person with an OSSA representative.

### **6.3 Training Program Application**

- 6.3.1 A Training Program Application must be in a form acceptable to, or provided by, OSSA and must contain the information required by OSSA, including:
  - (a) A completed Training Program Submission Form, in the form attached as Schedule "K" of the Guidelines;
  - (b) A copy of the lesson plans for the Training Program which includes but are not limited to the following:
    - (i) Instructing process;
    - (ii) Timelines;
    - (iii) Overall program learning objectives; and
    - (iv) Section learning objectives;

- (c) A copy of the table of contents for the Training Program;
- (d) A copy of the instructor manual, including instructor notes. A PowerPoint presentation and speaking notes for each slide must be submitted;
- (e) A copy of the participant workbook/handout (OSSA recommends the participant manual and instructor manual link closely with each other);
- (f) Knowledge and proficiency tests and testing processes, including test question answers;
- (g) Completed training material inventories in the form attached as Schedule “L” of the Guidelines;
- (h) Complete program in an un-locked electronic format, including but not limited to the instructor manual, any PowerPoint presentations, instructor notes, participant manual, tests, answer keys and handouts;
- (i) A completed Content Correlation Matrix for the applicable Safety Training Standard (Fall Protection Safety Training Standard, Fire Watch Safety Training Standard, Elevated Work Platform Safety Training Standard or Confined Space Entry and Monitor Safety Training Standard) in the form set out on the OSSA website at [www.ossa-wb.ca](http://www.ossa-wb.ca);
- (j) A copy of the Participant Training Credential in the form attached as Schedule “M” of the Guidelines; and
- (k) The applicable fee required to be paid as prescribed by OSSA from time to time for the submission of a Training Program Application as set out in Schedule “C” of the Guidelines (the “Program Submission Fee”)

(collectively referred to as the “Training Program Application”).

6.3.2 Copies of all materials submitted with the Training Program Application will be maintained at OSSA’s office and utilized by OSSA for Program Reviews and/or Administrative Audits.

6.3.3 The Training Program Application must be organized and presented to OSSA for review and evaluation in accordance with the form set out in the “Example of a Program Submission Package” on the OSSA website at [www.ossa-wb.ca](http://www.ossa-wb.ca);

6.3.4 Upon OSSA’s receipt of a completed Training Program Application, OSSA will:

- (a) Log the receipt of the Training Program Application;
- (b) Review the Training Program Application to ensure all documents are complete;

- (c) Notify the applicant that their Training Program Application has been received and is being processed; and
- (d) Deposit the Program Submission Fee after OSSA completes its first review of the Training Program Application.

6.3.5 If OSSA approves a Training Program Application:

- (a) OSSA will:
  - (i) Provide the Training Provider with a letter confirming the Accreditation of the Training Program (the "Approval Letter");
  - (ii) Send an invoice to the Training Provider for the annual fee prescribed by OSSA from time to time for the Training Program, as set out in Schedule "C" of the Guidelines (the "License Fee");
  - (iii) Upon OSSA's receipt of payment of the License Fee, mail the certificate acknowledging that the applicant has become Licensed to deliver an Accredited Training Program for OSSA (the "Licensing Certificate");
  - (iv) Confirm the Training Provider's contact information for registration for the Training Program and post it on the OSSA website, if the Training Provider so chooses;
  - (v) List the Training Provider on the OSSA website;
  - (vi) Provide the Training Provider with an OSSA Accreditation number that must be placed on all Participant Records given to the successful participants, including but not limited to the Participant Training Credential; and
  - (vii) Maintain a copy of the Training Program and Content Correlation Matrix, in the form set out on the OSSA website at [www.ossa-wb.ca](http://www.ossa-wb.ca), on file for both Program Review and Administrative Audit purposes.
- (b) The Training Provider will:
  - (i) Comply with and satisfy all of the requirements of a Training Provider as set out in these Guidelines;
  - (ii) Ensure their Training Program continues to meet and is delivered in accordance with all of the requirements set out in these Guidelines;
  - (iii) Provide OSSA with an executed copy of the acknowledgement attached to the Approval Letter; and



- (iv) Provide OSSA with completed Participant Consent Forms for all Participants in the Training Provider's Training Program;
  - (c) All of the credentials of the Accredited Training Program will be recognized by all of the OSSA Member's respective sites.
- 6.3.6 If OSSA does not approve the Training Program Application, OSSA will, in its sole discretion, notify the Training Provider in writing:
- (a) That the Training Program Application has not been approved; and/or
  - (b) Of any deficiencies with the Training Program Application.
- 6.3.7 If OSSA notifies the Training Provider of any deficiencies, OSSA will return the Training Program Application and its contents to the applicant to update as per the list of deficiencies. Training Providers must advise OSSA in writing of any changes or updates to their previously submitted or approved Training Program Application.
- 6.3.8 Upon updating the Training Program Application to address the deficiencies identified by OSSA, the Training Provider shall be permitted to resubmit such updated application to OSSA for further review. The initial Program Submission Fee paid by the Training Provider shall include a maximum of three (3) reviews of the Training Program Application, provided that a re-submitted application must be received by OSSA within 30 days of OSSA's last review of the Training Program Application. The Training Provider must pay additional fees, as required by OSSA:
- (a) If a re-submitted application is not received by OSSA within 30 days of OSSA's last review of the Training Program Application; or
  - (b) For each sequential review of the Training Program Application beyond the 3rd review of the Training Program Application.
- 6.3.9 If the Training Program Application, or any part thereof, requires a 3rd review, the Training Provider must call the OSSA within seven (7) days after the completion of the 2nd review to discuss the program requirements and, if requested by the OSSA, must meet with the OSSA in person.
- 6.3.10 OSSA will not approve a Training Program Application unless:
- (a) The Training Program meets the minimum requirements of the applicable Safety Training Standard; and
  - (b) The Training Provider acknowledges and agrees the Training Program will be taught in person by instructor facilitated delivery by Approved Instructors.

#### 6.4 **Program Review and/or Administrative Audit**

6.4.1 Upon providing a Training Provider with prior written notice, OSSA shall have the right, in its sole discretion, to complete a Program Review and/or Administrative Audit in accordance with the applicable process set out in Schedule "N" of the Guidelines.

#### 6.5 **Loss of Accreditation / Revocation**

6.5.1 The OSSA may, without liability of any kind, and in its sole discretion, revoke the Accreditation of one or more of a Training Provider's Accredited Training Programs for any one or more of the following reasons:

- (a) After a Program Review and/or Administrative Audit is completed, if:
  - (i) The quality and/or content of the Accredited Training Program being delivered no longer meets the agreed standards and requirements set out under the Guidelines or the applicable Safety Training Standards, and/or the program content is not being delivered as stated in the Accredited Training Program for which Accreditation was initially granted; or
  - (ii) The Administrative Processes/Policies of the Training Program submitted to OSSA as part of the Administrative Application Package are not developed and/or implemented and/or maintained as required by these Guidelines;
  - (iii) The Training Provider fails to complete the necessary annual requirements to maintain their Accreditation, including but not limited to applying for an annual renewal of their License;
- (b) Where a Training Provider has multiple Accredited Training Programs that are Accredited and the Training Provider fails to maintain the required Safety Training Standards in one or more of its Accredited Training Programs;
- (c) Failure of a Training Provider to comply with the OH&S Act, Regulation and Code or any other Legislation, judicial order, permit, license or agreement;
- (d) False or misleading information being provided by the Training Provider to the OSSA, its agents or employees;
- (e) The Training Provider ceases to carry on business;
- (f) Failure to apply for annual renewal of its License, and pay the annual License Fee by January 15<sup>th</sup>, as required by these Guidelines;
- (g) Bankruptcy or insolvency of the Training Provider; or
- (h) Any performance-based issues.

- 6.5.2 The Accreditation granted to a Training Provider by OSSA cannot be transferred upon the sale, assignment or transfer of the business of the Training Provider, including but not limited to a change of control of the Training Provider. Any change to the ownership structure or control of the Training Provider automatically results in the revocation or suspension (in the OSSA's sole discretion) of the Training Provider's License.
- 6.5.3 The OSSA may, without liability of any kind, and in its sole discretion, revoke or suspend a Training Provider's Accreditation of any one or more of a Training Provider's Accredited Training Programs for which the Training Provider has been Accredited for:
- (a) At any time by providing ninety (90) days prior written notice from OSSA to a Training Provider; or
  - (b) Immediately where:
    - (i) In the opinion of the OSSA, there is a safety concern;
    - (ii) The Accredited Training Program is not in compliance with the OH&S Act, Regulation and Code; or
    - (iii) The Accredited Training Program is not in compliance with the approved Safety Training Standard, the Administrative Application Standard submitted to OSSA, or these Guidelines.
- 6.5.4 In the event a Training Provider loses Accreditation for an Accredited Training Program:
- (a) The Training Provider's License will be automatically revoked for such Accredited Training Program and the Training Provider shall lose its right to reference OSSA Accreditation or identify their Training Program as meeting the OSSA's Safety Training Standard;
  - (b) The Training Provider shall not advertise or represent its Training Programs as Accredited Training Programs or provide the Participant Training Credential;
  - (c) All Instructors delivering the Accredited Training Program for which the Training Provider's Accreditation was lost will no longer be acknowledged by OSSA as an Approved Instructor for such Training Program;
  - (d) Workers trained by a Training Provider prior to the Training Provider's loss of their Accreditation will continue to have a valid Participant Training Credential, and may not require immediate re-training unless the Accredited Training Program taken by the participant did not comply with the Accredited Training Program initially approved by the OSSA, as shown in the results of a Program Review and/or Administrative Audit completed by OSSA.

- (e) The Training Provider will be removed as an Accredited Training Provider from the OSSA website; however, the Training Provider's name will remain on OSSA's website for a period of one (1) year as an Organization that is no longer Accredited to provide the specified Training Program; and
- (f) The Members and any advisory stakeholders will be notified of the change in Accreditation status accordingly.

6.5.5 Where a Training Provider's Accreditation has been suspended or revoked, the Training Provider automatically loses Accreditation to deliver the Accredited Training Programs for which their Accreditation was suspended or revoked.

6.5.6 Where a Training Provider's Accreditation has been suspended, OSSA may, in its sole discretion, and subject to any conditions set out by OSSA, allow a Training Provider to re-apply to OSSA to become an Accredited Training Provider, no earlier than one (1) year after the date of the suspension.

## 6.6 Program Updates / Reviews

6.6.1 Unless requested by OSSA, in the event that OSSA changes or rewrites its Safety Training Standard or RCOP, or if the Legislation is amended prior to the set program review schedule provided for in the Training Provider's Administrative Processes/Policies, a complete review of the Accredited Training Program may not be required.

6.6.2 The OSSA will only do a complete review of an Accredited Training Program under the following situations:

- (a) There have been major revisions or major changes to the RCOP;
- (b) There have been major revisions or major changes to the Safety Training Standards;
- (c) There have been major revisions or major changes to the OH&S Act, Regulation and Code; or
- (d) There have been re-occurring safety related incidents involving participants who took a particular Training Provider's Accredited Training Program.

6.6.3 The OSSA will notify a Training Provider in writing if they are required to update their Training Program(s) to reflect revisions or proposed revisions to a Safety Training Standard or RCOP, as well as the required changes that need to be made to the Training Provider's Accredited Training Program(s). It is the sole responsibility of the Training Provider to ensure that their Training Program is current with the OH&S Act, Regulation and Code at all times.

6.6.4 The Training Provider must confirm in writing that their Accredited Training Program(s), have been updated to meet the new Safety Training Standard or RCOP

within the time frame specified by OSSA, and that their revised Training Programs comply with all of the requirements set out in the Guidelines.

- 6.6.5 The Training Provider will be expected to submit a completed and revised Content Correlation Matrix in the form set out on the OSSA website at [www.ossa-wb.ca](http://www.ossa-wb.ca), or written confirmation as may be requested by OSSA, showing the appropriate changes made to all Accredited Training Programs within the specified time frame. The OSSA may, without liability of any kind, and in its sole discretion, revoke or suspend the Accreditation of a Training Provider’s Accredited Training Program if the Training Provider does not complete the required changes within the time specified by OSSA.
- 6.6.6 Notwithstanding any other provision in these Guidelines, it is the sole responsibility of the Training Provider to be aware of and comply with the Legislation, including but not limited to the OH&S Act, Regulation and Code, and any amendments thereto.

## **7. LICENSE RENEWAL AND REVOCATION**

- 7.1.1 The term of a License shall commence upon OSSA’s approval of the Training Program Application submitted by the Training Provider in accordance with Section 6.3.1 of the Guidelines, provided that:
- (a) The Training Provider must receive approval of its Training Program Application within six (6) months of the approval of its Administrative Application Package. A failure to do so will result in the Training Provider being required to re-submit their Administrative Application Package to OSSA, including payment of a further Application Fee for the Administrative Application Package; and
  - (b) The initial term of the License shall end on December 31<sup>st</sup> of the year in which the License was first issued (the “Initial Term”). Following the Initial Term, the Training Provider must apply for annual renewal of its License in accordance with this Article 7. The term of any renewed License will be from January 1<sup>st</sup> to December 31<sup>st</sup> of each year.
- 7.1.2 Upon OSSA’s approval of the Training Program Application, the Training Provider is required to pay the License Fee. The License Fee for the Initial Term shall be pro-rated from the date of OSSA’s approval of the Training Provider’s Administrative Application Package to December 31<sup>st</sup>.
- 7.1.3 All Training Providers must apply on an annual basis for renewal of their License, no later than October 31<sup>st</sup> of each year. An application for renewal of a License must include a Letter of Compliance in the form attached as Schedule “O” of the Guidelines.
- 7.1.4 If OSSA approves the renewal of a Training Provider’s License, the Training Provider must pay the annual License Fee as set out in the Fee Schedule attached as Schedule “C” of the Guidelines by January 15<sup>th</sup> of each year.

- 7.1.5 If OSSA approves the renewal of a Training Provider's License, and the Training Provider fails to pay the annual License Fee by January 15<sup>th</sup>, that Training Provider's License will be suspended or revoked at OSSA's sole discretion.
- 7.1.6 If, for any reason, OSSA does not renew a Training Provider's License, that Training Provider's License will expire on December 31<sup>st</sup> of that year;
- 7.1.7 A License may be revoked or suspended at any time by OSSA for any one or more of the following reasons:
- (a) Failure of a Training Provider to meet or abide by the Guidelines;
  - (b) Failure of a Training Provider to comply with the OH&S Act, Regulation and Code or any other Legislation, judicial order, permit, license or agreement;
  - (c) False or misleading information being provided by the Training Provider to the OSSA, its agents or employees;
  - (d) Failure to report the Quarterly Submission Information as set out in Schedule "P" of the Guidelines to OSSA;
  - (e) The Training Provider ceases to carry on business;
  - (f) The Training Provider fails to apply for annual renewal of their License;
  - (g) Bankruptcy or insolvency of the Training Provider; or
  - (h) Any performance-based issues.
- 7.1.8 Where a Training Provider's License has been revoked by OSSA, the Training Provider's Accreditation of its Accredited Training Program(s) is automatically revoked.
- 7.1.9 Where a Training Provider's License has been suspended by OSSA, the Training Provider is no longer able to deliver their Accredited Training Program during that time that their License is suspended.
- 7.1.10 The License granted to a Training Provider by OSSA cannot be transferred upon the sale, assignment or transfer of the business of the Training Provider, including but not limited to a change of control of the Training Provider. Any change to the ownership structure or control of the Training Provider may, without liability of any kind, and in the OSSA's sole discretion, result in the revocation or suspension of the Training Provider's License.
- 7.1.11 Notwithstanding any other provision in these Guidelines, OSSA may, without liability of any kind, and in OSSA's sole discretion:
- (a) Renew a Training Provider's License; or

- (b) Revoke or suspend a Training Provider's License at any time on providing ninety (90) days prior written notice from OSSA to a Training Provider.

7.1.12 Where a Training Provider's License has been suspended, OSSA may, in its sole discretion, and subject to any conditions set out by OSSA, allow a Training Provider to re-apply to OSSA to become a Licensed Training Provider, no earlier than one (1) year after the date of the suspension.

## 8. ORGANIZING AND SUBMITTING THE APPLICATION

All materials submitted to OSSA must be collated and presented in a tabulated format in a 3-ring binder, sectioned and titled appropriately or as otherwise identified on the OSSA website from time to time.

### 8.1 Sending Materials to OSSA

Material **mailed** should be addressed to:

Oil Sands Safety Association (OSSA)  
Box 13, 8115 Franklin Ave.  
Fort McMurray, AB T9H 2H7

Phone: (780) 791-4944 Fax: (780) 715-3945

Material that is submitted by **courier** should be addressed to:

Oil Sands Safety Association (OSSA)  
Room 132 Bob Lamb Industry Education Centre  
8015 Franklin Avenue  
Fort McMurray, AB T9H 5B9

Phone: (780) 791-4944 Fax: (780) 715-3945

### 8.2 Further Information

If further guidance is required in completing an application or submitting documents required by these Guidelines, please refer to the OSSA website at [www.ossa-wb.ca](http://www.ossa-wb.ca). or contact the OSSA at (780) 791-4944.

**SCHEDULE "A"**

**ADMINISTRATIVE APPLICATION FORM**

**Date:**

**Company Information:**

Company Name \_\_\_\_\_

Mailing Address \_\_\_\_\_

City \_\_\_\_\_ Province \_\_\_\_\_ Postal Code \_\_\_\_\_

Telephone # \_\_\_\_\_ Fax # \_\_\_\_\_

How many employees are there in your company: \_\_\_\_\_

How long has your company been offering safety training? \_\_\_\_\_ years \_\_\_\_\_ months

Describe the training courses that your company currently offers: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Company Website \_\_\_\_\_

**Contact Person Information:**

Contact Person \_\_\_\_\_ Contact E-Mail \_\_\_\_\_

Contact Phone# Office \_\_\_\_\_ Cell # \_\_\_\_\_

**Applicants Information:**

Applicant's Name \_\_\_\_\_ Applicant's Title \_\_\_\_\_

Applicant Phone # Office \_\_\_\_\_ Cell # \_\_\_\_\_

**What Training Programs will Your Company Be Seeking Accreditation For?**

Elevated Work Platform  Yes  No

Confined Space Entry and Monitor  Yes  No

Fall Protection  Yes  No

Fire Watch  Yes  No



**Program Development & Delivery:**

**\*\* Your company's organization chart must accompany this application** (This chart must include: the number of employees your organization employees, the roles of each of your employees, who the lead instructor will be; and who will be in charge of program development and reviews.)

What is your company's background in safety? \_\_\_\_\_

---

What is your company's background in adult education/training? \_\_\_\_\_

---

What type of electronic database do you use, and what are the exporting capabilities and formats (for example: xls, or xms) \_\_\_\_\_

---

Where are the locations that you will be offering training?

<b>PROVINCE</b>	<b>CITY (CITIES)</b>
Newfoundland & Labrador	
Prince Edward Island	
Nova Scotia	
New Brunswick	
Quebec	
Ontario	
Manitoba	
Saskatchewan	
Alberta	
British Columbia	
United States	
Other	

**Please Read Before Signing:**

I certify that:

- (a) All information provided by me in this Application is true and complete to the best of my knowledge and that I have withheld nothing that, if disclosed, would alter the integrity of this Application; and
- (b) I have read the Application and Program Submission Guidelines APSG2014, including the Schedules thereto, and understand the requirements to have my company licensed and to keep it in good standing, and the requirements to receive Accreditation for my company's Training Program.

Dated this \_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.

Company Name: \_\_\_\_\_

Per: \_\_\_\_\_  
(Authorized Signatory)

Name: \_\_\_\_\_

Title: \_\_\_\_\_

**SCHEDULE “B”**

**ADMINISTRATIVE MATRIX - ADMINISTRATIVE PROCESSES/POLICIES**

**General Comments:**

All Administrative Policies and Processes are to be submitted in a tabbed three ringed binder and labeled the “Administrative Manual”. All sections are to be clearly labeled and all information is to be computer generated, not handwritten.

All references below to section numbers refer to the sections in the corresponding Schedule to the Guidelines for the respective Administrative Process/Policy.

**Review Comments:**

Add if needed

<b>SCHEDULE “D” - INSTRUCTOR MANAGEMENT PROCESS/POLICY</b>		<b>Location in Administrative Manual</b>	<b>OSSA Review – Meets, Gap or More Information Required</b>
<p><b>The Training Provider must have a clearly documented policy, system, and process to ensure all Instructors are qualified and approved to teach the respective Accredited Training Program(s) which meet the Safety Training Standards. The policy, system and process shall be evaluated by OSSA, from time to time and in the sole discretion of OSSA, to confirm all Instructors continue to meet the requirements and content of the Accredited Training Program (the “Instructor Management Policies”). Instructor Management Policies shall include, but are not limited to:</b></p>			
<b>1.1.1 (a) Instructor Hiring Criteria</b>	Define specific “Instructor Hiring Criteria”		
<b>1.1.1 (b) Instructor Qualifications</b>	Define policies that ensure Instructors meet the Instructor Hiring Criteria for each Safety Training Standard for which the Instructor will be delivering the Accredited Training Program		
<b>1.2.1 and 1.2.2 Instructor Training</b>	Describe the Instructor Training Program		
<b>1.2.3 and 1.2.4 Instructor Training</b>	Describe the minimum number of Accredited Training Programs the Instructors must teach each year to maintain status as an Approved Instructor		
<b>1.2.5 Instructor Training</b>	Agree and acknowledge that the Training Provider takes all risk, liability and responsibility for training, maintaining competency and auditing Instructors, and that the OSSA Members and Employees assume no risk, liability or responsibility to provide any training of any kind to any Instructors.		

<b>1.3.1 and 1.3.2 Instructor Audits</b>	Describe the Instructor audit/review policy that meets the requirements set out in Section 1.3.2 of Schedule "D"		
<b>1.3.3 Instructor Audits</b>	Describe what audit/review processes you have in place to ensure your Accredited Training Program is being delivered in a way that does not deviate from the Accredited Training Program approved by OSSA		
<b>1.3.4 Instructor Audits</b>	Describe the record keeping procedure in place for all in-classroom audits of Instructors		
<b>1.4.1 Instructor Records</b>	Describe your policy for updating the Approved Instructor List		
<b>1.4.2 Instructor Records</b>	Describe your policy that ensures that only Accredited Instructors are signing Participant Training Credentials		
<b>1.4.3 Instructor Records</b>	<p>It is the responsibility of the Training Provider to maintain an up-to-date qualified Instructor List for each Accredited Training Program. The Instructor List must contain at a minimum the following:</p> <ol style="list-style-type: none"> <li>1) Instructor Name</li> <li>2) Organization</li> <li>3) Training taken to instruct the Accredited Training Program</li> <li>4) Field experience with the applicable Safety Training Standard</li> <li>5) Period of time Instructor has been instructing the content of the applicable Safety Training Standard</li> <li>6) Education credentials (for example: Certificate of Adult Education)</li> <li>7) Training credentials as it applies to the Safety Training Standard being taught</li> <li>8) Date Instructor was officially approved by the Training Provider to instruct the Accredited Training Program</li> <li>9) Instructor audits and findings related to the delivery of the Accredited Training Program by the Instructor</li> <li>10) Records maintained verifying that all Administrative Processes/Polices have been read, understood and acknowledged by each Instructor, prior to being approved by the Training Provider.</li> </ol> <p>Please indicate how these measures are implemented in your company.</p>		

<b>SCHEDULE “E” - PROGRAM DEVELOPMENT &amp; MANAGEMENT PROCESS/POLICY</b>		<b>Location in Administrative Manual</b>	<b>OSSA Review – Meets, Gap or More Information Required</b>
<b>The Training Provider must have a clearly documented policy, system and process to ensure that all Instructors professionally manage classroom activities (the “Program Management Policies”). The Program Management Policies shall include, but are not limited to, the following:</b>			
<b>1.1.1 (a) Lesson Plan</b>	A written lesson plan must be in place for each Accredited Training Program to be followed by each Instructor		
<b>1.1.1 (b) Lesson Plan</b>	The lesson plan should at a minimum clearly define the process each Instructor is to follow to deliver the Accredited Training Program		
<b>1.1.1 (c) Lesson Plan</b>	Provide OSSA with an example of an Accredited Training Program for the Instructor		
<b>1.2.1 (a) Program Review/Revisions</b>	Describe your policy regarding the process and frequency for completing reviews of each Accredited Training Program		
<b>1.2.1 (b) Program Review/Revisions</b>	Describe your policy regarding how a review of an Accredited Training Program is done (include a copy of the Training Provider’s template)		
<b>1.2.1 (b) Program Review/Revisions</b>	Describe how your documentation includes the results of the review and how any program changes are incorporated		
<b>1.2.1 (c) Program Review/Revisions</b>	Describe your policy to ensure all revisions to Training Programs have been sent to OSSA for approval prior to actual implementation		
<b>1.3.1 Knowledge Evaluation</b>	Describe your company’s process and frequency for evaluating test questions		
<b>1.3.1 Knowledge Evaluation</b>	Describe how your company evaluates the test questions to determine if the training program content and/or test question / program delivery requires review and revision based on the success or concerns of any test question		
<b>1.3.2 Knowledge Evaluation</b>	Describe what documentation is in place that demonstrates that actual test question reviews have occurred for each program, and include the results of the review and any changes incorporated with appropriate resubmission to the OSSA		
<b>1.4.1 Program Changes &amp; Instructors</b>	Describe your company’s Program Change Process		
<b>1.4.2 Program Changes &amp;</b>	Describe your company’s Program Change Process as it relates to validating that each and all Instructors of the specific Safety Training Standard have		

<b>Instructors</b>	received the updates and/or changes		
<b>1.5.1 Participant Feedback</b>	Describe your company’s process that is in place to receive participant feedback forms and evaluating for possible program changes		
<b>1.5.2 Participant Feedback</b>	Describe your system that is in place for maintaining the feedback forms and making them available for review upon request by OSSA		
<b>SCHEDULE “F” - CLASSROOM MANAGEMENT PROCESS/POLICY</b>			
<p><b>The Training Provider must have a clearly documented policy, system and process that directs and provides guidance to Instructors to ensure that classroom activities are managed consistently and similarly by all Instructors of each Accredited Training Program. Classroom management policies, systems and processes shall include, but are not limited to, the following:</b></p>		<b>Location in Administrative Manual</b>	<b>OSSA Review – Meets, Gap or More Information Required</b>
<b>1.1.1 (a) Validating Prior Learning</b>	Describe your process that is in place to ensure that all Accredited Training Program pre-requisites are verified prior to the start of the training session		
<b>1.1.1 (b) Validating Prior Learning</b>	Describe your process for confirming participant’s prior learning level as it relates to the Accredited Training Program		
<b>1.2.1 Late Arrivals / Early Departures</b>	Describe your process for all Instructors to follow in the event participants arrive late for the start of the Accredited Training Program or leave prior to the end of the training session		
<b>1.3.1 (a) Class Size</b>	Describe the maximum and minimum class size for each Accredited Training Program		
<b>1.3.1 (b) Class Size</b>	Describe the actions that may be required by the Instructor should the class size not meet the policy, system or process set by the Training Provider		
<b>1.4.1 (a) Student Evaluation Integrity</b>	Describe the actions required by Instructors to ensure the integrity of the theory and practical testing processes during the Accredited Training Program		
<b>1.4.1 (b) Student Evaluation Integrity</b>	Describe your procedure for the Training Provider to maintain copies of the completed written exams		
<b>1.5.1 (a) Tracking Failures or</b>	Describe your process for tracking and reporting participants that fail the Accredited Training Program due to not passing the practical or theory tests or		

<b>Incompletes</b>	not completing the Accredited Training Program		
<b>1.5.1 (b) Tracking Failures or Incompletes</b>	Describe the process in place to validate that all Instructors are following the tracking process		
<b>1.6.1 (a) Learning Concerns</b>	Describe the policy in place requiring all Accredited Training Programs to be taught only in English and without translators		
<b>1.6.1 (b) Learning Concerns</b>	Describe your process for Instructors to follow to effectively manage any and all participant learning concerns, for example: language barriers, reading or writing challenges		
<b>SCHEDULE "G" - SAFETY &amp; EQUIPMENT MANAGEMENT PROCESS/POLICY</b> <b>The Training Provider must have a clearly documented safety policy, system and process that:</b> <b>(a) Directs and provides guidance to Instructors to ensure that all training activities associated with the Accredited Training Program are completed in a safe environment; and</b> <b>(b) Requires the Training Provider to be able to demonstrate at all times that they are fulfilling the employer responsibilities as defined at a minimum in the OH&amp;S Act, Regulation and Code</b> <b>Such policies, systems and processes shall include but are not limited to the following:</b>		<b>Location in Administrative Manual</b>	<b>OSSA Review – Meets, Gap or More Information Required</b>
<b>1.1.1 (a) Worksite Safety</b>	Describe your documented policy ensuring Instructor's review with all participants at the beginning of the training program all worksite safety requirements for both classroom and field training that states at a minimum that no safety infraction will be tolerated during any Accredited Training Program		
<b>1.1.1 (b) Worksite Safety</b>	Describe your process that validates the safety rules have been reviewed during the training session, including any personal protective equipment (PPE) requirements		
<b>1.2.1 (a) Equipment Inspections and Hazard Assessment</b>	Describe your documented policy requiring Instructors to inspect all tools, material and equipment prior to classroom training and/or participant use		
<b>1.2.1 (b) Equipment Inspections and Hazard</b>	Describe the policy that includes maintaining the inspection records and demonstrate that all equipment, materials and tools have been inspected		

<b>Assessment</b>			
<b>1.2.1 (c) Equipment Inspections and Hazard Assessment</b>	Describe your process for maintaining records which demonstrate that any equipment provided to the Training Provider (for example: elevated work platforms) is inspected prior to training participants		
<b>1.2.1 (d) Equipment Inspections and Hazard Assessment</b>	Describe a formal hazard assessment sign off and how these records are maintained on file		
<b>1.2.1 (e) Equipment Inspections and Hazard Assessment</b>	Describe your formal inspection sign off and how these records are maintained on file		
<b>SCHEDULE "H" - RECORDS MANAGEMENT PROCESS/POLICY</b> The Training Provider must have a clearly documented records management policy, system and process that directs and provides guidance to Instructors to ensure that all training records are maintained as required by OSSA. This includes, but is not limited to:		<b>Location in Administrative Manual</b>	<b>OSSA Review – Meets, Gap or More Information Required</b>
<b>1.1.1 Consent Forms</b>	Describe how your company utilizes and maintains all consent forms used for obtaining necessary participant approval to retain and upload training records into your database and OSSA's training tracking database provided by OSSA from time to time		
<b>1.2.1 Training Provider Database</b>	Provide details on the database you currently use to maintain Participant Records, for example: participant's first, middle and last name, date of birth, course name, training date and expiry date		
<b>1.3.1 Replacement Student Credentials</b>	Provide details on your process for issuing replacement Participant Training credentials including how you search the database to locate students who require a replacement		
<b>1.4.1 Search Capabilities</b>	Provide details of how you search the database to verify if a participant has received previous training for a particular Safety Training Standard		
<b>1.5.1 Training Credential</b>	Provide that your company will provide Participant Training Credential s which meet the minimum standards as set out in the form attached as Schedule "M"		



	of the Guidelines, and have a security label obtained from OSSA		
<b>SCHEDULE "I" - TRAINING RECORDS DATABASE PROCESS/POLICY</b>		<b>Location in Administrative Manual</b>	<b>OSSA Review – Meets, Gap or More Information Required</b>
<b>1.1.1 Training Records Database</b>	Describe the processes your company utilizes to maintain Participant Records		
<b>1.2.1 Training Records Database</b>	Describe the process to validate each participant's identity		
<b>1.3.1 Training Records Database</b>	Describe the process to notify the successful participants of the location of the Participant Records and the process for retrieving their information if they so desire		
<b>1.4.1 and 1.4.2 Training Records Database</b>	Describe the process to make records available to the participants in the event of loss of their Participant Training Credentials up to and including the expiry of their credential  *The Training Provider <b>will be required</b> to submit and/or upload all successful participant training records into any electronic database, if requested by OSSA		
<b>SCHEDULE "J" - ACCREDITED PROGRAM INFORMATION FOR OSSA PROCESS/POLICY</b> **Failure to report this information may result in a loss of the Training Provider License		<b>Location in Administrative Manual</b>	<b>OSSA Review – Meets, Gap or More Information Required</b>
<b>1.1.1 Accredited Program Information for OSSA</b>	Describe your process that will ensure you meet the Quarterly Submission Requirements for the following: <ul style="list-style-type: none"> <li>• Number of courses instructed for each Accredited Training Program</li> <li>• Total number of successful participants per Accredited Training Program</li> <li>• Total number of non-successful participants per Accredited Training Program</li> <li>• Location where training took place for each quarter, for example:</li> </ul>		

	<p>total participants =55; 40 in Edmonton, AB; 15 in Fort McMurray, AB</p> <ul style="list-style-type: none"><li>• Current number of Approved Instructors on File</li><li>• Number of new Instructors approved to Instruct each Accredited Program</li><li>• Number of Instructors losing their approval to Instruct an Accredited Program</li><li>• Number of Credential Security Labels used (including those damaged or issued on re-printed credentials)</li></ul>		
<p><b><i>The Licensed Training Provider is responsible to collect the information from all Instructors and send to OSSA on time. The information gathered will be utilized as a measurement of the effectiveness of OSSA in meeting objectives. Failure to report this information may result in a loss of Licensing.</i></b></p>			

**SCHEDULE "C"**  
**FEE SCHEDULE**

**1. FEES**

OSSA is a not-for-profit Organization which has the following fee structure in place:

- (a) An Application Fee is required to be paid by an applicant for the review of an Administrative Application Package;
- (b) A Program Submission Fee is required to be paid by a Training Provider for the review of a Training Program Application;
- (c) A Licensing Fee is required to be paid by all Training Providers on an annual basis; and
- (d) A Credential Security Label Fee is required to be paid by a Training Provider.

All payments must be in the form of a cheque made payable to the Oil Sands Safety Association.

**1.1 Application Fee**

- 1.1.1 A non-refundable fee of one thousand fifty (\$1,050.00) dollars (including GST) must be paid when the Administrative Application Package is submitted to OSSA.
- 1.1.2 In the event OSSA does not approve an applicant's Administrative Application, but allows the applicant to address the deficiencies identified by OSSA, the applicant shall be permitted to re-submit such updated application to OSSA for further review. The initial Application Fee paid by the Training Provider shall include a maximum of three (3) reviews of the Administrative Application Package, provided that a re-submitted application must be received by OSSA within 30 days of OSSA's last review of the Administrative Application Package.
- 1.1.3 Re-submissions after 30 days may require an additional non-refundable fee of one thousand and fifty (\$1,050.00) dollars (including GST) which will include a maximum of three (3) further reviews provided a re-submitted application is received by OSSA within 30 days of OSSA's last review of the Administrative Application Package.

**1.2 Program Submission Fee**

- 1.2.1 A non-refundable fee of two thousand one hundred (\$2,100.00) dollars (including GST) must be paid when with the Training Program Application for each Training Standard that the Training Provider wishes to receive Accreditation for is submitted to OSSA.
- 1.2.2 In the event that OSSA does not approve a Training Provider's Training program Application, but allows the Training Provider to address the deficiencies identified by OSSA, the applicant shall be permitted to re-submit such updated application to OSSA for further review. The initial Program Submission Fee paid by the Training Provider shall

include a maximum of three (3) reviews of the Training Program Application, provided that a re-submitted application must be received by the OSSA within 30 days of OSSA's last review of the Training Program Application.

- 1.2.3 Re-submissions after 30 days may require an additional non-refundable fee of two thousand one hundred (\$2,100.00) dollars (including GST) which will include a maximum of three (3) further reviews provided a re-submitted application is received by OSSA within 30 days of OSSA's last review of the Administrative Application Package.

### 1.3 **Licensing Fee Structure**

- 1.3.1 Unless otherwise directed by OSSA, the following Licensing Fee structure is in place for all Training Providers:

- (a) Licensing Fee for the Initial Term. Upon obtaining Accreditation of their 1st Training Program, OSSA will invoice the Training Provider a non-refundable fee of three thousand one hundred and fifty (\$3,150.00) dollars (including GST) for the Initial Term. The License Fee for the Initial Term shall be pro-rated from the date of OSSA's approval of the Training Provider's Administrative Application Package to December 31st. The Training Provider must pay an additional one thousand five hundred and seventy-five (\$1,575.00) dollars (including GST) for each additional Accredited Training Program.
- (b) Licensing Fee to be paid annually. Once Licensed, all Training Providers will be required to notify OSSA by October 31<sup>st</sup> of each year of their intent to renew the License for their Accredited Programs for the upcoming calendar year, including a Letter of Compliance in the form attached as Schedule "O" of the Guidelines.

- 1.3.2 An example of how the Licensing Fee works is as follows:

- (a) A Training Provider seeking a license to deliver one (1) Accredited Training Programs must pay OSSA a Licensing Fee in the amount of three thousand one hundred and fifty (\$3,150.00) dollars (including GST);
- (b) A Training Provider seeking a license to deliver two (2) Accredited Training Programs must pay OSSA a Licensing Fee in the amount of four thousand seven hundred twenty-five (\$4,725.00) dollars (including GST);
- (c) A Training Provider seeking a license to deliver three (3) Accredited Training Programs must pay OSSA a Licensing Fee in the amount of six thousand three hundred (\$6,300.00) dollars (including GST); and
- (d) A Training Provider seeking a license to deliver four (4) Accredited Programs must pay OSSA a Licensing Fee in the amount of seven thousand eight hundred and seventy-five (\$7,875.00) dollars (including GST).

#### 1.4 **Credential Security Label**

A non-refundable fee of one dollar and five cents (\$1.05) (inclusive of GST) must be paid by the Training Provider for each Credential Security Label requested by the Training Provider. Credential Security Labels will only be sold to Training Providers in good standing with OSSA. Quantities issued will be based on previous year's training numbers, and will be tracked by OSSA.

## **SCHEDULE "D"**

### **ADMINISTRATIVE PROCESSES/POLICIES - INSTRUCTOR MANAGEMENT PROCESS/POLICY**

#### **1. INSTRUCTOR MANAGEMENT**

The Training Provider must have a clearly documented policy, system, and process to ensure all Instructors are qualified and approved to teach the respective Accredited Training Program(s) which meet the Safety Training Standards. The policy, system and process shall be evaluated by OSSA, from time to time and in the sole discretion of OSSA, to confirm all Instructors continue to meet the requirements and content of the Accredited Training Program (the "Instructor Management Policies"). Instructor Management Policies shall include, but are not limited to:

##### **1.1 Instructor Hiring Criteria**

1.1.1 A clearly documented policy, system and process which:

- (a) Clearly defines the specific Instructor hiring criteria for each Safety Training Standard for which the Training Provider is seeking Accreditation of a Training Program (the "Instructor Hiring Criteria"); and
- (b) Demonstrates that Instructors will be or have been hired that meet the Instructor Hiring Criteria for each specific Safety Training Standard for which the Instructor will be delivering the Training Provider's Accredited Training Program.

##### **1.2 Instructor Training**

1.2.1 The Training Provider must have an instructor qualification and training program ("Instructor Training Program") that demonstrates how an Instructor progresses from being hired to become an Approved Instructor to deliver the Accredited Training Program.

1.2.2 Examples of an Instructor Training Program include the following:

- (a) Watching the Accredited Training Program being delivered by an Instructor who has been approved by the Training Provider as having successfully completed the Instructor Training Program, as approved by the Training Provider ("Approved Instructor");
- (b) Co-teaching the Accredited Training Program with an Approved Instructor;
- (c) Instructing the Accredited Training Program as the lead Instructor; and
- (d) Instructing the Accredited Training Program under observation of an Approved Instructor.

- 1.2.3 The Training Provider must establish a minimum number of Accredited Training Programs that an Instructor must teach. Unless otherwise approved by OSSA, all Instructors must at a minimum, instruct three (3) Accredited Training Programs per year for the Instructor’s status as an Approved Instructor to remain active.
- 1.2.4 Should the Instructor fail to instruct three (3) Accredited Training Programs per year for the Training Provider, the Instructor must be re-approved before instructing the Training Programs.
- 1.2.5 Each Training Provider takes all risk, liability and responsibility of training, maintaining competency and auditing all Instructors. The OSSA Members and Employees assume no risk, liability or responsibility to provide any training of any kind to any Instructors.

### 1.3 **Instructor Audits**

- 1.3.1 The Training Provider must have a clearly documented Instructor audit/review policy, system and process. The audit/review must ensure that all Instructor audits are completed and any identified follow-up actions are in place for each Approved Instructor.
- 1.3.2 Unless otherwise approved by OSSA, all Instructors must at a minimum, have an in-classroom audit within six (6) months of completing the Instructor Training Program and at least once every two (2) years after that to maintain their approval to instruct Accredited Training Programs for which they have been certified.
- 1.3.3 The internal audit must demonstrate at a minimum that each Instructor has not altered or changed the Accredited Training Program’s content, including, without limitation, the equipment requirements, testing processes and Participant Training Credential in any way that deviates from the Accredited Training Program approved by OSSA.
- 1.3.4 The Training Provider must maintain records of all in-classroom audits of Instructors for review by OSSA for a period of no less than two (2) years after the termination and/or resignation of the Instructor.

### 1.4 **Instructor Records**

- 1.4.1 It is the responsibility of the Training Provider to maintain an up-to-date qualified Instructor listing (the “Approved Instructor List”) for each Accredited Training Program which sets out the Approved Instructors who have successfully completed the Instructor Training Program.
- 1.4.2 Only Instructors that appear on the Approved Instructor List are authorized to sign the Participant Training Credential provided to participants who successfully complete an Accredited Training Program.
- 1.4.3 The Approved Instructor List must contain, at a minimum, the following information:

- (a) Instructor name;
- (b) Organization;
- (c) Training taken to instruct the Accredited Training Program;
- (d) Field experience with the applicable Safety Training Standard;
- (e) Period of time Instructor has been instructing the content of the applicable Safety Training Standard;
- (f) Educational credentials (i.e. Certificate of Adult Education);
- (g) Training credentials as it applies to the Safety Training Standard being taught;
- (h) Date Instructor was officially approved by Training Provider to instruct the Accredited Training Program;
- (i) Instructor audits and findings related to the delivery of the Accredited Training Program by the Instructor; and
- (j) Records maintained verifying that all Administrative Processes/Policies have been read, understood and acknowledged by the Instructor prior to being approved by the Training Provider.



## **SCHEDULE "E"**

### **ADMINISTRATIVE PROCESSES/POLICIES - PROGRAM DEVELOPMENT & MANAGEMENT PROCESS/POLICY**

#### **1. PROGRAM DEVELOPMENT & MANAGEMENT**

The Training Provider must have a clearly documented policy, system and process to ensure that all Instructors professionally manage classroom activities (the "Program Management Policies"). The Program Management Policies shall include, but are not limited to, the following:

##### **1.1 Instructor Training Package**

1.1.1 A clearly documented policy, system and process which requires:

- (a) A written lesson plan with clear learning objectives and instructor notes for each Accredited Training Program to be followed by each Instructor for the purposes of training the Instructor to instruct the Training Program;
- (b) That the lesson plans will at a minimum clearly define the process each Instructor is to follow to deliver the content of the Accredited Training Program; and
- (c) That the Training Provider will submit to OSSA an example of an Instructor Training Program for each Training Program for review and approval.

##### **1.2 Program Review/Revisions**

1.2.1 A clearly documented policy, system and process stating the process and frequency of reviews and/or revisions of each Accredited Training Program which:

- (a) Includes the results of the review and any program changes incorporated;
- (b) Details how a review is done (include a copy of the Training Provider's template); and
- (c) Requires the delivery to OSSA of all program revisions for approval prior to implementation.

##### **1.3 Knowledge Evaluation**

1.3.1 A clearly documented policy, system and process stating the process and frequency of evaluating test questions. The purpose of the evaluation is to determine if the Accredited Training Program content and/or test questions and/or program delivery requires review and revision based on the success or concern of any test question.

1.3.2 The Training Provider must have documentation demonstrating that actual test question reviews have occurred for each Accredited Training Program, and are to include the

results of the review and any changes incorporated with appropriate resubmission to OSSA.

#### 1.4 **Program Changes & Instructors**

- 1.4.1 A clearly documented policy, system and process for providing Instructors with any changes to the content or process for delivery of an Accredited Training Program (the "Program Change Process").
- 1.4.2 The Program Change Process must have a system to validate that all Instructors of the Safety Training Standard have received the updates and/or changes.

#### 1.5 **Participant Feedback**

- 1.5.1 A clearly documented policy, system and process stating the process and frequency of reviewing the participant feedback forms and evaluating such forms for possible changes to the Accredited Training Program.
- 1.5.2 The Training Provider must have a system for maintaining the feedback forms, and shall provide them to OSSA upon request by the OSSA.

## SCHEDULE "F"

### ADMINISTRATIVE PROCESSES/POLICIES - CLASSROOM MANAGEMENT PROCESS/POLICY

#### 1. CLASSROOM MANAGEMENT

The Training Provider must have a clearly documented policy, system and process that directs and provides guidance to Instructors to ensure that classroom activities are managed consistently and similarly by all Instructors of each Accredited Training Program. Classroom management policies, systems and processes shall include, but are not limited to, the following:

##### 1.1 Validating Prior Learning

1.1.1 A clearly documented policy, system and process to:

- (a) Ensure that all pre-requisites to an Accredited Training Program are verified prior to the start of the training session (such as OSSA Fall Protection certificates for OSSA's Elevated Work Platform Standard); and
- (b) Confirm participant's prior learning level as it relates to the Accredited Training Program.

##### 1.2 Late Arrivals / Early Departures

1.2.1 A clearly documented policy, process and system for all Instructors to follow in the event participants arrive late for the start of the Accredited Training Program or leave prior to end of training session, which would result in the participant not being able to complete the course or receive its credentials for that Accredited Training Program.

##### 1.3 Class Size

1.3.1 A clearly documented policy, system and process stating:

- (a) The maximum and minimum class size for each Accredited Training Program; and
- (b) The actions required of the Instructor should the class size not meet the policy, system or process set by the Training Provider.

##### 1.4 Student Evaluation Integrity

1.4.1 A clearly documented policy, system and process which describes the actions required by Instructors to:

- (a) Ensure the integrity of the theory and practical testing processes during the Accredited Training Program; and
- (b) Maintain copies of the completed written exams on file.

## 1.5 **Tracking Failures or Incompletes**

1.5.1 A clearly documented policy, system and process:

- (a) Tracking and reporting participants that fail the Accredited Training Program as the result of not passing the practical or theory tests or not completing the Accredited Training Program; and
- (b) Demonstrating that all Instructors are following the tracking process.

## 1.6 **Learning Concerns**

1.6.1 A clearly documented policy, system and process:

- (a) Requiring all Accredited Training Programs to be taught only in English and without any translators; and
- (b) Describing the process for Instructors to follow to effectively manage any and all participant learning concerns. The learning concerns may include such things as language barriers and reading or writing challenges.

## **SCHEDULE "G"**

### **ADMINISTRATIVE PROCESSES/POLICIES - SAFETY & EQUIPMENT MANAGEMENT PROCESS/POLICY**

#### **1. SAFETY & EQUIPMENT MANAGEMENT**

The Training Provider must have a clearly documented safety policy, system and process that:

- (a) Directs and provides guidance to Instructors to ensure that all training activities associated with the Accredited Training Program are completed in a safe environment; and
- (b) Requires the Training Provider to be able to demonstrate at all times that they are fulfilling the employer responsibilities as defined at a minimum in the OH&S Act, Regulation and Code.

Such policies, systems and processes shall include but are not limited to the following:

##### **1.1 Worksite Safety**

1.1.1 A clearly documented policy, system and process:

- (a) Requiring Instructors to review at the beginning of each Accredited Training Program all worksite safety requirements for both classroom and field training with the participants; and
- (b) Setting out a process to validate that the safety rules have been reviewed during the training session, including any personal protective equipment requirements.

##### **1.2 Equipment Inspections and Hazard Assessment**

1.2.1 A clearly documented policy, system and process requiring Instructors to:

- (a) Inspect all tools, material and equipment prior to classroom training and/or participant use;
- (b) Maintain the inspection records and demonstrate that all equipment, materials and tools have been inspected;
- (c) Maintain records demonstrating that any equipment that is provided to the Training Provider (such as elevated work platforms) is inspected prior to training participants;
- (d) Complete a formal hazard assessment;
- (e) Implement a formal inspection sign-off process and these records must be maintained on file.

## **SCHEDULE "H"**

### **ADMINISTRATIVE PROCESSES/POLICIES - RECORDS MANAGEMENT PROCESS/POLICY**

#### **1. RECORDS MANAGEMENT**

The Training Provider must have a clearly documented records management policy, system and process that directs and provides guidance to Instructors to ensure that all training records are maintained as required by OSSA. This includes, but is not limited to:

##### **1.1 Consent Forms**

1.1.1 The Training Provider must utilize and maintain all consent forms for the purposes of obtaining necessary participant approvals to keep and upload training records into the Training Provider's database and/or that are required by OSSA from time to time, including but not limited to the Participant Consent Forms, in the form attached as Schedule "Q".

##### **1.2 Training Provider Database**

1.2.1 The Training Provider must have a current database utilized to maintain all Participant Records. The database must include at a minimum the participant's full first, middle and last name, birth date, course name, training date and expiry date.

##### **1.3 Replacement Participant Credentials**

1.3.1 A clearly documented policy, system and process for issuing replacement Participant Training Credentials to participants. The process must be reviewed during each Accredited Training Program.

##### **1.4 Search Capabilities**

1.4.1 The Training Provider's database must have the ability to be searched to validate if a participant has received previous training for a particular Safety Training Standard.

##### **1.5 Training Credential**

1.5.1 The Training Provider must provide a Participant Training Credential which meets the minimum standards as set out in the form attached as Schedule "M" of the Guidelines, and has a security label obtained from OSSA (the "Credential Security Label") as indicated on the Participant Training Credential in the form attached as Schedule "M" of the Guidelines. Training Providers must request the Credential Security Labels from OSSA by filling out the form attached Schedule "R" of the Guidelines. Training Providers must also pay the fees for the Credential Security Labels as set out in the Fee Schedule attached as Schedule "C" of the Guidelines.

## **SCHEDULE "I"**

### **ADMINISTRATIVE PROCESSES/POLICIES - TRAINING RECORDS DATABASE PROCESS/POLICY**

#### **1. TRAINING RECORDS DATABASE**

##### **1.1 Participant Records**

1.1.1 The Training Provider must maintain records of all participants who successfully or have not successfully completed the Accredited Training Program (the "Participant Records").

##### **1.2 Identification Validation**

1.2.1 The Training Provider must validate the participant's identity by collecting proper government issued photo ID which contains the participant's full first, middle and last name, birth date and a photo of the participant; or OSSA Member site provided photo ID which contains the participant's full first, middle and last name, as well as a picture of the participant.

##### **1.3 Location**

1.3.1 The Training Provider and/or Instructors have a responsibility to notify the successful participants of the location of the Participant Records and the process of retrieving their information if they so desire.

##### **1.4 Availability**

1.4.1 The Training Provider will provide participants with a new copy of their Participant Training Credential in the event of loss of a Participant Training Credential, up to and including expiry of their credential.

1.4.2 The Training Provider will be required to submit and/or upload all successful Participant Records into any electronic database as required by OSSA from time to time.

## SCHEDULE "J"

### ADMINISTRATIVE PROCESSES/POLICIES - ACCREDITED PROGRAM INFORMATION FOR OSSA PROCESS/POLICY

#### 1. ACCREDITED PROGRAM INFORMATION FOR OSSA

##### 1.1 Quarterly Submission of Information Requirements

1.1.1 Unless otherwise directed, the Training Provider must in every quarter of the calendar year (being on or before January 15th, April 15th, July 15th and October 15th of each year) provide OSSA, at a minimum, with the following information for each Accredited Training Program and Instructor:

- (a) Number of courses instructed for each Accredited Training Program;
- (b) Total number of successful participants for each Accredited Training Program;
- (c) Total number of non-successful participants for each Accredited Training Program;
- (d) Location where Accredited Training Programs were provided for each quarter, for example: total participants = 55; 40 in Edmonton, AB; 15 in Fort McMurray, AB;
- (e) Current number of Approved Instructors;
- (f) Number of new Instructors approved to instruct each Accredited Training Program;
- (g) Number of Instructors losing their approval to instruct an Accredited Training Program; and
- (h) Number of Credential Security Labels used (including those damaged or issued on re-printed credentials).

1.1.2 Failure to report this information may result in the revocation or suspension of the Training Provider's License.



**SCHEDULE "K"**

**TRAINING PROGRAM SUBMISSION FORM**

**Date:** \_\_\_\_\_

**Company Information:**

Company Name: \_\_\_\_\_

Street Address: \_\_\_\_\_

Mailing Address (*if different*): \_\_\_\_\_

City: \_\_\_\_\_ Province: \_\_\_\_\_ Postal Code: \_\_\_\_\_

Office Telephone # \_\_\_\_\_ Fax # \_\_\_\_\_

**Primary Contact Information:**

**Alternate Contact Information:**

First Name: \_\_\_\_\_ Last Name: \_\_\_\_\_

First Name: \_\_\_\_\_ Last Name: \_\_\_\_\_

Position Title: \_\_\_\_\_

Position Title: \_\_\_\_\_

Office Telephone # \_\_\_\_\_ Cell # \_\_\_\_\_

Office Telephone # \_\_\_\_\_ Cell # \_\_\_\_\_

E-mail address: \_\_\_\_\_

E-mail address: \_\_\_\_\_

**What Program are you seeking Accreditation for?** \_\_\_\_\_

**What is/are the name(s) of the individual(s) who developed the material being submitted for this Program?**

Name(s)	Relationship to the Provider (for example: Employee, 3 <sup>rd</sup> Part Developer, Consultant, etc.)

**List the locations where this program will be taught.** (specific address if possible)


--	--

**What is the name of the Approved Instructor who will approve/certify other Instructors in this course?**

---

**Please Read Before Signing:**

I certify that:

- (a) All information provided by me in this submission is true and complete to the best of my knowledge and that I have withheld nothing that, if disclosed, would alter the integrity of this submission; and
- (b) I have read the Application and Program Submission Guidelines APSG2014, including the Schedules thereto, and understand the requirements to have my company licensed and to keep it in good standing, and the requirements to receive Accreditation for my company's Training Program.

Dated this \_\_\_\_ day of \_\_\_\_\_, 20 \_\_\_\_.

Company Name: \_\_\_\_\_

Per: \_\_\_\_\_  
(Authorized Signatory)

Name: \_\_\_\_\_

Title: \_\_\_\_\_

**SCHEDULE "L"**  
**TRAINING MATERIALS INVENTORIES**

Company Name: \_\_\_\_\_

Initial       Revision

**APPENDIX A**  
**Training Material Inventory**  
*Instructional Aides*

<b>ID Number</b>	<b>Video/DVDs Title</b>	<b>Brief Description of A/V Content</b>	<b>How The Content Is Used In Program</b>
A-1			
A-2			
A-3			
A-4			
A-5			
A-6			
A-7			

Company Name: \_\_\_\_\_

Initial       Revision

**APPENDIX B**  
**Training Equipment Inventory**  
*Instructional Aides*

<b>ID Number</b>	<b>Training Equipment</b>	<b>Brief Description of Equipment</b>	<b>How The Equipment Is Used In Program</b>
<b>B-1</b>			
<b>B-2</b>			
<b>B-3</b>			
<b>B-4</b>			
<b>B-5</b>			
<b>B-6</b>			
<b>B-7</b>			

Company Name: \_\_\_\_\_

Initial       Revision

**APPENDIX C**  
**Other**  
*Instructional Aides*

<b>ID Number</b>	<b>Other</b>	<b>Brief Description of "Other" Content</b>	<b>How The "Other" Content Is Used In Program</b>
<b>C-1</b>			
<b>C-2</b>			
<b>C-3</b>			
<b>C-4</b>			
<b>C-5</b>			
<b>C-6</b>			
<b>C-7</b>			

Company Name: \_\_\_\_\_

Initial       Revision

**APPENDIX D**  
**References (Legislative, Regulatory, Other)**

References	Supporting Information
<b>Legislation</b>	1. 2. 3. 4. 5. 6.
<b>Regulatory</b>	1. 2. 3. 4. 5. 6.
<b>Other</b>	1. 2. 3. 4. 5. 6.

## SCHEDULE "M"

### PARTICIPANT TRAINING CREDENTIAL

<b>ABC Training Company</b> <b>OSSA Confined Space</b> <b>Entry/Monitor</b>		<b>Training Provider Name</b>		<b>NEW</b> Reserve for OSSA Sticker
<b>Timothy Jan Gondek</b> Participant Name (Print) (Full First, Full Middle, Full Last)		<b>OSSA (Program Name)</b>		
<b>Sept 30, 2011</b> Course Date	<input checked="" type="checkbox"/> Initial	<b>STS #CSE/M2010</b> <b>OSSA # 123459-44</b> <b>TP# 1234</b>	<b>Candidate Name (Print)</b> (Full First, Full Middle, Full Last)	<b>STS#CSE/M2010</b> <b>OSSA # 123456-78</b> <b>TP# 1234</b>
<b>Sept 30, 2014</b> Expiry Date	<input type="checkbox"/> Renewal	<b>John Frank Smith</b> Authorization (Print) <i>John F. Smith</i> Authorization (Signature)	<input type="checkbox"/> Initial	Authorization (Print)
			<input type="checkbox"/> Renewal	Authorization (Signature)

#### 1. Participant Training Credential

Training Providers will ensure candidates who successfully complete OSSA Accredited Training Programs are given a Participant Training Credential. This record is the candidate's proof of proficiency that they have successfully completed an OSSA Accredited Safety Training Program.

The Training Provider must submit a sample of its Participant Training Credential for approval by OSSA.

##### 1.1 Participant Training Credential Example

1.1.1 Each Participant's Training Credential must include, at a minimum, the following:

- A safety training standard number for which you are accredited;
- The Training Provider number allocated by OSSA (for example: OSSA# 10234-56);
- Accredited Training Provider's Name (Organization Name);
- Area for the OSSA Credential Sticker (.5"x.5"). This sticker must be on the front of the Participant Training Credential;
- The independent number assigned to each successful participant by the Training Provider (for example: TP#1234);
- Successful participant's name (full first, full middle, full last) printed. If there is no middle name please add the initials "nmn" ("no middle name" to credential);

- (g) Title of Training Program (for example: Fall Protection Safety Training Standard, Fire Watch Safety Training Standard, Elevated Work Platform Safety Training Standard or Confined Space Entry and Monitor Safety Training Standard);
- (h) Date of Training Program;
- (i) Training expiry date;
- (j) Instructor's full name printed;
- (k) Instructor's signature;
- (l) Identification as to whether the training is:
  - (i) Initial; or
  - (ii) Re-certification

## 1.2 **Temporary Participant Training Credential**

1.2.1 A temporary Participant Training Credential may be issued with the written permission of OSSA. In order for an Accredited Training Provider to be granted permission to issue a temporary Participant Training Credential, the following guidelines must be followed:

- (a) A formal written request must be made to the OSSA stating the reason for requesting the use of a temporary Participant Training Credential along with a copy of the form of the temporary card;
- (b) The Participant Training Credential must have a Training Provider number on the temporary card, and it must correspond with the number on the permanent Participant Training Credential which must be issued to the participant within thirty (30) days;
- (c) The word "Temporary" must be watermarked diagonally across the front of the temporary Participant Training Credential;
- (d) There must be a note in the Expiry Date line of the temporary Participant Training Credential that includes the following statement:

"This Participant Training Credential Record/Card  
expires 30 days from date issued";
- (e) All other information required on permanent Participant Training Credential (as set out above in Section 1.1) must be included on the temporary Participant Training Credential; and



- (f) The Accredited Training Provider must have a policy in place to ensure that the Permanent Training Credential card is received by the participant within 30 days.

## SCHEDULE "N"

### ADMINISTRATIVE AUDITS AND PROGRAM REVIEWS

#### 1. Administrative Audits and Program Reviews

##### 1.1 Administrative Audits

- 1.1.1 OSSA reserves the right (but not the obligation) to complete Administrative Audits with Training Providers in OSSA's sole discretion. If OSSA exercises its right to complete an Administrative Audit, the Training Provider must provide OSSA with all of the information and documentation submitted to OSSA as part of their Administrative Application and Training Program Application packages.
- 1.1.2 In the event OSSA conducts an Administrative Audit of a Training Provider as a result of an internal investigation commenced by OSSA in response to a complaint with respect to such Training Provider, all reasonable costs and expenses incurred by OSSA in conducting such Administrative Audit or internal investigation will be the sole responsibility of the Training Provider.
- 1.1.3 The Training Provider must ensure that recorded audit and follow-up processes are in place for each Approved Instructor ensuring that each Approved Instructor does not alter or change the Accredited Training Program's content, including, without limitation, the equipment requirements, testing processes and Participant Training Credential cards, in any way that deviates from the Accredited Training Program approved by and on file with OSSA. The Training Provider has the responsibility to inform all Instructors that OSSA reserves the right to complete Administrative Audits at OSSA's sole discretion.
- 1.1.4 Upon completion of the Administrative Audit, a decision will be made by OSSA to reflect one of the following:
- (a) The Training Provider maintains Accreditation / License for the Accredited Training Program being evaluated;
  - (b) The Training Provider is given a time frame within which to correct any concerns raised by OSSA and to submit an updated Content Correlation Matrix in the form set out on OSSA's website at [www.ossa-wb.ca](http://www.ossa-wb.ca); or
  - (c) The Training Provider's Accreditation is suspended or withdrawn.

##### 1.2 Program Reviews

- 1.2.1 OSSA reserves the right (but not the obligation) to complete the Program Reviews with Training Providers in OSSA's sole discretion. If OSSA exercises its right to complete a Program Review, each Training Provider must allow a representative of OSSA to attend at the Training Provider's place of business or instruction of the Accredited Training Program to review the Accredited Training Program with any Instructor.

- 1.2.2 The Program Review will assess program content, instructor delivery methodology, written and practical testing, and integrity and credential allocation compared to the Accredited Training Program approved by OSSA. The Training Provider must provide a company representative (the "Program Representative") to join the individual from OSSA conducting the review, for the duration of the Program Review.
- 1.2.3 The Training Provider has the responsibility to inform all Instructors that OSSA reserves the right and discretion to complete Program Reviews with them.

## **2. Administrative Audit and/or Program Review Preparation**

To ensure an efficient and effective use of both the Training Provider's and OSSA's auditing resources, the following processes and procedures will be followed by the Training Provider and OSSA for an Administrative Audit and Program Review:

### **2.1 Pre-Administrative Audit**

2.1.1 OSSA will:

- (a) Notify the Training Provider that an Administrative Audit will be completed (the "Audit Notice"); and
- (b) Confirm a date with the Training Provider for the Administrative Audit, which will be no later than sixty (60) days from the date of the Audit Notice.

2.1.2 The Training Provider will:

- (a) Upon receipt of the Audit Notice, advise OSSA of potential dates for the completion of the Administrative Audit;
- (b) Provide and/or have available to OSSA on the date of the Administrative Audit all documentation specified in the Guidelines and submitted to OSSA as part of the Administrative Application Package and the Training Program Application;
- (c) In the event that the Administrative Audit is occurring on an OSSA member site, access passes and/or security clearances will be completed in advance of the Administrative Audit to allow OSSA to have access to such site to complete the Administrative Audit; and
- (d) Identify the Training Provider's representative (the "Audit Representative") who will participate in the Administrative Audit.

### **2.2 Day of Administrative Audit**

2.2.1 The representative of OSSA conducting the Administrative Audit and/or Program Review (the "OSSA Auditor") will:

- (a) Arrive at the time and place determined by the Training Provider and the OSSA Auditor; and
- (b) Conduct an interview of the Audit Representative and document the results of such interview.

2.2.2 The Audit Representative will ensure all resources required by the OSSA Auditor to complete the Administrative Audit are available to the OSSA Auditor.

### 2.3 **Post-Administrative Audit**

2.3.1 The OSSA Auditor will prepare and submit to the Executive Director of OSSA (or their designate) a summary of the Administrative Audit for the review and use as the basis for the final Report of the Administrative Audit (the “Final Audit Report”). The Final Audit Report will be broken down into 3 Sections:

- (a) Section 1 – Required critical actions that must be taken to ensure the Training Provider’s Accredited Training Program remains in good standing;
- (b) Section 2 – Suggestions for improvements to the Accredited Training Program based upon best practices or general observations made by the OSSA Auditor; and
- (c) Section 3 – Key observations and findings utilized as the basis for Sections 1 and 2 above. This Section includes additional observations not requiring action.

2.3.2 The Training Provider will respond to the findings set out in the Final Audit Report and take any actions required by the Final Audit Report within the time frame set out from time to time in the sole discretion of OSSA.

### 2.4 **Pre-Program Review**

2.4.1 OSSA will:

- (a) Notify the Training Provider that a Program Review will be completed (the “Review Notice”); and
- (b) Confirm a date with the Training Provider for the Program Review, which will be no later than sixty (60) days of the Review Notice.

2.4.2 The Training Provider will:

- (a) Upon receipt of the Review Notice, advise OSSA of potential dates for the completion of the Program Review;
- (b) Provide and/or have available to OSSA on the date of the Program Review all documentation specified in the Guidelines and submitted to OSSA as part of the Administrative Application Package and the Training Program Application;

- (c) Identify the Program Representative who will participate in the Program Review;
- (d) Provide and/or have available two (2) copies of all training materials (including instructor notes, presentation materials, student manuals, and tests);
- (e) Ensure the Instructor is aware of the time and place of the Program Review;
- (f) Provide an area in the classroom with access to electrical plug-ins; and
- (g) Identify and provide any unique safety equipment that may be required (for example, the OSSA Auditor will have a hard hat, safety glasses, steel toed boots and gloves).

## 2.5 Day of Program Review

### 2.5.1 The OSSA Auditor will:

- (a) Arrive at the time and place determined by the Training Provider and the OSSA Auditor;
- (b) Conduct an interview of the Program Representative and document the results of such interview;
- (c) Ask the Instructor several questions throughout the day (when appropriate during breaks);
- (d) Observe only and not be expected to answer questions in the classroom setting unless specifically asked and it is appropriate to do so; and
- (e) Provide a high level summary of Program Review findings, prior to leaving.

### 2.5.2 The Instructor will:

- (a) Deliver the course as directed by the Training Provider's requirements; and
- (b) Participate a high level summary of Program Review findings, if that is required by the Training Provider.

### 2.5.3 The Program Representative will:

- (a) Ensure all resources required by the OSSA Auditor to complete the Program Review are available to OSSA; and
- (b) Participate in the high level summary of Program Review findings.

## 2.6 Post Review

- 2.6.1 The OSSA Auditor will prepare and submit to the Executive Director of OSSA (or their designate) a summary of the Program Review for the review and use as the basis for the final Report of the Program Review (the “Final Review Report”). The Final Review Report will be broken down into 3 Sections:
- (a) Section 1 – Required critical actions that must be taken to ensure the Training Provider’s Accredited Training Program remains in good standing;
  - (b) Section 2 – Suggestions for Improvements to the Accredited Training Program based upon best practices or general observations made by the OSSA Auditor;
  - (c) Section 3 – Key observations and findings utilized as the basis for Sections 1 and 2 above. This Section includes additional observations not requiring action.
- 2.6.2 The Training Provider will respond to the findings set out in the Final Review Report and take any actions required by the Final Review Report within the time frame set out from time to time in the sole discretion of OSSA.

## SCHEDULE "O"

### LETTER OF COMPLIANCE

On behalf of \_\_\_\_\_ (the "Training Provider"), the undersigned hereby represents and warrants to the Oil Sands Safety Association ("OSSA") that the following obligations have been met for the 20\_\_ calendar year.

- (a) We are aware of all of the requirements set out in the Application and Program Submission Guidelines (APSG2014) (the "Guidelines").
- (b) We have complied with all of the Administrative Processes/Policies submitted with our Training Program Application which were approved by OSSA, as set out in the Guidelines.
- (c) We have maintained all information required by OSSA pursuant to the Guidelines and participated (if applicable) in Program Reviews and/or Administrative Audits which were conducted at the discretion of OSSA.
- (d) Any changes to our Accredited Training Programs and/or Administrative Processes/Policies will be submitted to OSSA for approval prior to implementation.
- (e) We have submitted our training numbers in the form attached as Schedule "P" of the Guidelines, to OSSA within 2 weeks of the end of each quarter.

Furthermore, we intend to maintain or seek Accreditation for the following programs with the OSSA for the upcoming year.

- Confined Space Entry/Monitor (CSE/M2010)
- Elevated Work Platform (EWP2010)
- Fall Protection (FP2010)
- Fire Watch (FW2010)

Dated this \_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.

Company Name: \_\_\_\_\_

Per: \_\_\_\_\_  
(Authorized Signatory)

Name: \_\_\_\_\_

Title: \_\_\_\_\_

**SCHEDULE "P"**

**QUARTERLY SUBMISSION INFORMATION**

Details		1st Quarter Jan – Mar	2nd Quarter Apr- Jun	3rd Quarter Jul – Sept	4th Quarter Oct – Dec	20__ Totals
<b>Section A - New Participants</b>						
1	Number of Courses taught by Instructors (New participants Only)					
2	Number of participants receiving a Participant Training Credential by Instructors -less participants that were unsuccessful (New participants only)					
3	Number of participants who did not successfully complete course by Instructors					
<b>Section B - Re-certification Participants</b>						
Please note: Complete the following information if you have trained participants for <b>re-certification purposes only</b>		<b>** not available until July 21, 2014 at the earliest (3 years from date of issue for current standards)</b>				
4	Number of Courses taught by Instructors for Re-certification Training					
5	Number of participants receiving the re-certification credential by Instructors					
<b>Section C – Security Labels Issued</b>		<b>1<sup>st</sup> Quarter</b>	<b>2<sup>nd</sup> Quarter</b>	<b>3<sup>rd</sup> Quarter</b>	<b>4<sup>th</sup> Quarter</b>	<b>Totals</b>
6	<b>Total number of security labels issued on credentials</b>					
7	<b>Number of damaged/destroyed labels</b>					

Section D - Location Where Participants Received Initial Training For Reporting Quarter	# of participants Trained				
	1 <sup>st</sup> Quarter	2 <sup>nd</sup> Quarter	3 <sup>rd</sup> Quarter	4 <sup>th</sup> Quarter	Totals





## SCHEDULE "Q"

### PARTICIPANT CONSENT FORM

Training Program: \_\_\_\_\_

Date: \_\_\_\_\_

#### PARTICIPANT INFORMATION

First: \_\_\_\_\_ Middle: \_\_\_\_\_ Last: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Personal Email (Optional): \_\_\_\_\_

#### COMPANY INFORMATION OF PARTICIPANT'S EMPLOYER

Company Name	Company Contact / Manager
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Address	City	Province	Postal Code
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#### **Informed Consent for Use of Personal Information**

The undersigned Participant, by signing this Participant Consent Form (the "Form"), hereby acknowledges and agrees that:

1. the Participant information contained in this Form (the "Participant Information") will be used by \_\_\_\_\_ (the "Training Provider") in the Training Provider's database, and will be disclosed by the Training Provider or its designated agent to the Oil Sands Safety Association of Alberta ("OSSA") for OSSA's records and use in the training tracking database implemented and maintained by OSSA from time to time. The Participant Information may also be disclosed by the Training Provider or its designated agent to members of OSSA, contractors of OSSA or any third party approved by OSSA.
2. he/she has read and understands the content of the forgoing consent, and consents to the Training Provider's collection and delivery of his/her information to OSSA, members of OSSA, contractors of OSSA or any third party approved by OSSA.

Dated as of the date above written.

\_\_\_\_\_  
Signature of Witness to Participant

\_\_\_\_\_  
Signature of Participant

\_\_\_\_\_  
Print Name of Witness

\_\_\_\_\_  
Print Name of Participant

**SCHEDULE "R"**

**CREDENTIAL SECURITY LABEL REQUEST FORM**

The OSSA tamper proof security label must be affixed to the front of all OSSA Participant Training Credentials issued for Program standards 2010 (STS\*\*\*2010) or newer.  
See [www.ossa-wb.ca](http://www.ossa-wb.ca) under the program submission documents for an example.

**Date:** \_\_\_\_\_

**Training Provider Information:**

**Quantity Requested \* #** \_\_\_\_\_

Company Name: \_\_\_\_\_

**Shipping Information :**

Ship Attention To:

Name: \_\_\_\_\_ E-mail Address: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

City: \_\_\_\_\_ Province: \_\_\_\_\_ Postal Code: \_\_\_\_\_

Office Telephone # \_\_\_\_\_ Fax # \_\_\_\_\_

Upon receipt of this request, OSSA will issue an invoice for the total cost, as set out in the Fee Schedule attached to Schedule "C" of the Guidelines. Product will ship upon receipt of payment. Labels will only be available to Accredited Training Providers whose membership is in good standing.

\*Quantities of Credential Security Labels issued to each Training Provider will be tracked. Training Providers must report any damaged labels when submitting their Quarterly Submission Information to OSSA in the form attached as Schedule "P" to the Guidelines.

**SCHEDULE "S"**

**OSSA TRADEMARK**

