2020

SAFETECH
Synergy

Elevating **QHSE** with Industry Best **Technology!**
Presented by I T R ∧ K

Thursday, May 28 10:00 AM (MST)

ITRAK Procedure Competency

ISV Connect Premier Tier Partner

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Microsoft
Dynamics 365
Certified

Microsoft

www.useitrak.com

Introductions

Diane Fritz
Senior Consultant

Corinne Dyck
Accountant & Sales Support

21:05

Competency in ITRAK 365
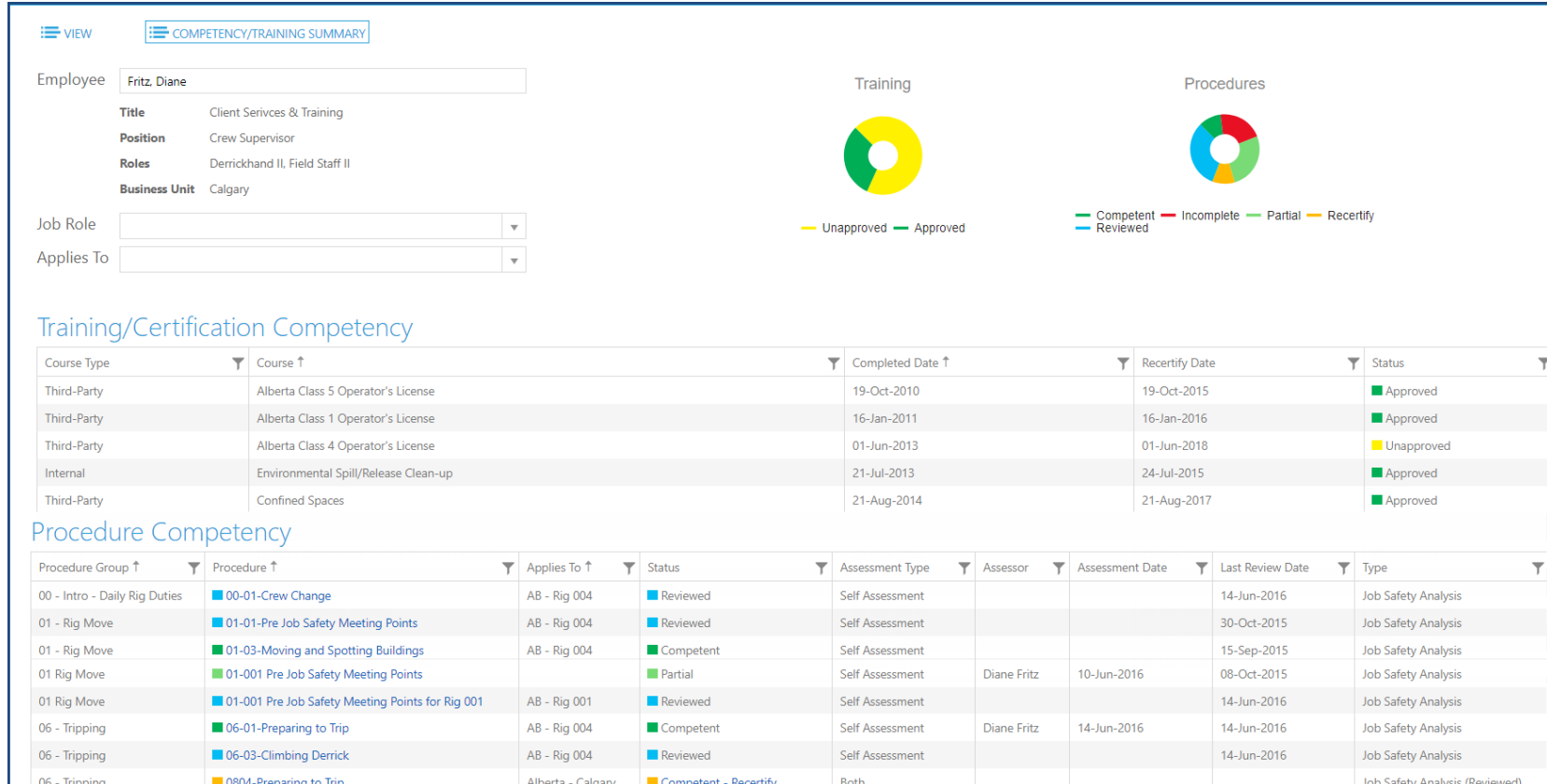

VIEW | **COMPETENCY/TRAINING SUMMARY**

Employee Fritz, Diane

Title	Client Serivces & Training
Position	Crew Supervisor
Roles	Derrickhand II, Field Staff II
Business Unit	Calgary

Job Role

Applies To

Training

- Unapproved
- Approved

Procedures

- Competent — Incomplete — Partial — Recertify
- Reviewed

Training/Certification Competency

Course Type	Course ↑	Completed Date ↑	Recertify Date	Status
Third-Party	Alberta Class 5 Operator's License	19-Oct-2010	19-Oct-2015	Approved
Third-Party	Alberta Class 1 Operator's License	16-Jan-2011	16-Jan-2016	Approved
Third-Party	Alberta Class 4 Operator's License	01-Jun-2013	01-Jun-2018	Unapproved
Internal	Environmental Spill/Release Clean-up	21-Jul-2013	24-Jul-2015	Approved
Third-Party	Confined Spaces	21-Aug-2014	21-Aug-2017	Approved

Procedure Competency

Procedure Group ↑	Procedure ↑	Applies To ↑	Status	Assessment Type	Assessor	Assessment Date	Last Review Date	Type
00 - Intro - Daily Rig Duties	00-01-Crew Change	AB - Rig 004	Reviewed	Self Assessment			14-Jun-2016	Job Safety Analysis
01 - Rig Move	01-01-Pre Job Safety Meeting Points	AB - Rig 004	Reviewed	Self Assessment			30-Oct-2015	Job Safety Analysis
01 - Rig Move	01-03-Moving and Spotting Buildings	AB - Rig 004	Competent	Self Assessment			15-Sep-2015	Job Safety Analysis
01 Rig Move	01-001 Pre Job Safety Meeting Points		Partial	Self Assessment	Diane Fritz	10-Jun-2016	08-Oct-2015	Job Safety Analysis
01 Rig Move	01-001 Pre Job Safety Meeting Points for Rig 001	AB - Rig 001	Reviewed	Self Assessment			14-Jun-2016	Job Safety Analysis
06 - Tripping	06-01-Preparing to Trip	AB - Rig 004	Competent	Self Assessment	Diane Fritz	14-Jun-2016	14-Jun-2016	Job Safety Analysis
06 - Tripping	06-03-Climbing Derrick	AB - Rig 004	Reviewed	Self Assessment			14-Jun-2016	Job Safety Analysis
06 - Tripping	0804-Preparing to Trip	Alberta - Calgary	Competent - Recertify	Both				Job Safety Analysis (Reviewed)

Procedures in ITRAK 365

Our People

Diane
Procedure Author
- Responsible for authoring procedures in the Portal and on Mobile

Jane
Employee
- Has Procedure Competency records assigned to her by her Job Role(s)
- Responsible for reviewing and being competent in tasks related to her job

Bob
Supervisor
- Jane's Supervisor
- Responsible for assessing Jane

Jim
Company Assessor
- Company wide assessor
- Can assess **any** employee, including Jane and Bob

ITRAK
365
SAFETY & COMPLIANCE SOFTWARE

Procedure Authoring

Procedure Authoring

- Procedures are designed to be managed in the Portal

- Procedures are authored in the Portal

- Procedures can optionally have an Approval / Review process or be Published straight from Draft

- Procedures can be corporate or site specific

- Procedures can be duplicated to make minor adjustments for the various sites

- Procedures can be revised with version history

Procedure Authoring

Add Procedure

Name *

Procedure Number

Type*

Critical ☐

Group*

Subgroup

Assessment Type*

Self Assessment

Potential Risk

Residual Risk

Applies To

Facility

Team Lead

Exam

Next Review Date

Valid (Months)

Description

Reviewers
Michelle Bryan

Approver
Procedure Global Approve Team

Hazards
Export to Excel   Export to PDF

Name

Page 0   of 0   10   items per page

To enable this content, save the record

Other Hazards

Controls
Export to Excel   Export to PDF

Name

Page 0   of 0   10   items per page

To enable this content, save the record

Other Controls

Performed By
Export to Excel   Export to PDF

Role

Page 0   of 0   10   items per page

To enable this content, save the record

Procedure Multiselect 1

Procedure Multiselect 2

Save & Open

Using Chain Saw (Draft)

⚙ Diane Fritz ✕

←

Draft
Published
⬇ Next

Procedure

Name
Using Chain Saw (Draft)

Procedure Number
CHN-870

Type
Job Safety Analysis

Group
Power Tools

Assessment Type
Self Assessment

Exam
Chain Saw Procedure Exam

✏ Edit

Document

Select files...

Steps/Tasks

Export to Excel   Export...

# ↑	Name	Desc...
1	Review JSA	
2	Preparing for work	Know Emerg... Respo...
5	Transporting chainsaws	
6	Clean area and equipment.	

Page 1   of 1

⊕ Add   Reorder

PPE/Tools Requi...
2-Way Radio, Chaps, Fire Exting...
✏ Edit

Attachments
Export to Excel

Title	Preview	Comments

Page 0   of 0   20   items per page   No items to display

⊕ Add

Add Step/Task

Critical

Section

Notice

Caution

Name*

Description

Hazards/Concerns

Potential Risk

Controls/Recommendations

Residual Risk

Performed By
Export to Excel   Export to PDF

Role ↑

Page 0   of 0   10   items per page   No items to display

To enable this content, save the record

Attachment
Export to Excel   Export to PDF

Subject ↑	File Name	Size	Created By	Created On (Local Time) ↑

Page 0   of 0   10   items per page   No items to display

To enable this content, save the record

Assessment Criteria

Type	Description

Page 0   of 0   10   items per page   No items to display

To enable this content, save the record

The employee record & who can assess

Bob
Supervisor
- Jane's Supervisor
- Responsible for assessing Jane

Reports To
- An individual who can assess the employee in the Portal. Generally the Manager or the Supervisor is identified here.

Reviewed By
- A second individual who can assess the employee in the Portal. This may be the Supervisor if the Reports To is identified as the Manager.

Reporting Team
- A Team is a group of users.
- The Team is related to the employee.
- All members of the Team are able to assess the employee.
- An example of this use is when you have a site that has multiple Leads that can assess the employees for their competency

Assessment Types

3 assessment types provide flexibility to how your employees achieve competency for a specific Procedure.

Self Assessment

Employee reviews the Procedure and acknowledges by:
- Agreeing to a statement that they understand what they have reviewed
- Successfully passing a related exam

Once successful, Competency status is '**Reviewed**'

Assessor Assessment

An assessment is completed by the employees Reports To, Reviewed By, the company Assessor, or a member of the employee's Reporting Team.

An assessment can optionally contain criteria on how the employee is to be assessed on each step/task

Reports To, Reviewed By, the company Assessor, or a member of the employee's Reporting Team updates the Competency status to '**Partial**' or '**Competent**'

Both

Involves the employee and the employees Reports To, Reviewed By, the company Assessor, or a member of the employee's Reporting Team.

The employee first reviews the Procedure as outlined in Self Assessment.

Once the employee has completed their review, the Reports To, Reviewed By, the company Assessor, or a member of the employee's Reporting Team completes their assessment and updates the Competency status to '**Partial**' or '**Competent**'

Employee
&
Procedure Competency

ITRAK Portal & the Employee

Jane
Employee
- Has Procedure Competency records assigned to her by her Job Role(s)
- Responsible for reviewing and being competent in tasks related to her job

Activity page
- **Outstanding Competencies**: all Procedure Competencies related to a Job Role for Jane which she needs to complete her review

Personal page
- **Competency grid**: all Procedure Competencies related to Jane, regardless of status. Outstanding, Competent, Partial, Reviewed, etc.

Meeting control
- **Process flow (form)**: Using the Meeting control, a Procedure can be reviewed. Employees who attend and sign off on the Meeting receive a 'Reviewed' Competency record when the process flow is **Closed**

Demo – Employee Jane in the Portal

Supervisor
&
Procedure Competency

ITRAK Portal & the Supervisor

Bob
Supervisor
- Jane's Supervisor
- Responsible for assessing Jane

Activity page
- **Outstanding Team Competencies**: all Procedure Competencies employees have completed their review, or that are Assessor Assessment that Bob needs to assess.

Team page
- **Filter and select employee**
- **Competency grid**: Review Jane's Procedure Competency records. Assess Jane's Competency.

Competency page - optional
- **Employee**: Search and select employee's.
- **Competency grid**: Review Jane's Procedure Competency records. Assess Jane's Competency.

Demo – Supervisor Bob in the Portal

Company Assessor
&
Procedure Competency

ITRAK Portal & the Super Trainer

Jim
Company Assessor
- Company wide assessor
- Can assess **any** employee, including Jane and Bob

Competency page
- **Employee**: Search and select any employee.
- **Competency grid**: Review Bob or Jane's Procedure Competency records. Assess their Competency.

Procedure page
- **Procedure Steps:** Assessors can add Assessment criteria to a Procedure Step at any time to the Procedure, whether it is in a Draft or Published state.

Procedure Competency Recertification

Recertification

- Recertification is the how you keep your employees safe
- There are 4 ways recertification works with Procedures

1. Valid For: Number of months the Procedure is valid for. An Expiry Date is set on the Procedure Competency record based on the number of months and when the employee completed the requirements.

2. Procedure Revision – Recertification: When a procedure is revised and employees need to be recertified.

3. Procedure Revision – Recertification – Self Assessment Only: Available when the Procedure being revised was Assessment Type of Both. Option to have the employees do a Self Assessment instead of completing the review and then being assessed.

4. Procedure Revision – Notified: When a procedure is revised, and it is only a minor change, option to notify employees only and not require recertification.

Highlights of 4.14

Highlights of 4.14

- Employee Reporting Team: Ability to have a Team related to the employee record that can review Procedure Competency and Training records. Previously this was limited to the Reports To and Reviewed By, individual employees identified on the employee record.

- Procedure Valid For: Recertification process based on the number of months a Procedure is valid for. Similar to Training and how long a Course is valid for.

- Activity page: My Outstanding Competencies, Outstanding Team Competencies. Ability for employees, Reports To/Reviewed By/Reporting Team to manage Competency from the Activity page.

- Procedure fields: Procedure Number, Sub-groups related to Groups, 2 customizable multi selects

- Procedure page: Procedure View. A view which can be filtered and customized for your Procedures.

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Procedure Competency ITRAK Mobile Apps

Procedure Competency & the Apps

Menu **Procedures** Filter

| Add | Copy | Edit Existing | Entered |

Search

Preparing to Trip

Using Chain Saw

Operating Skid Steer

Welding
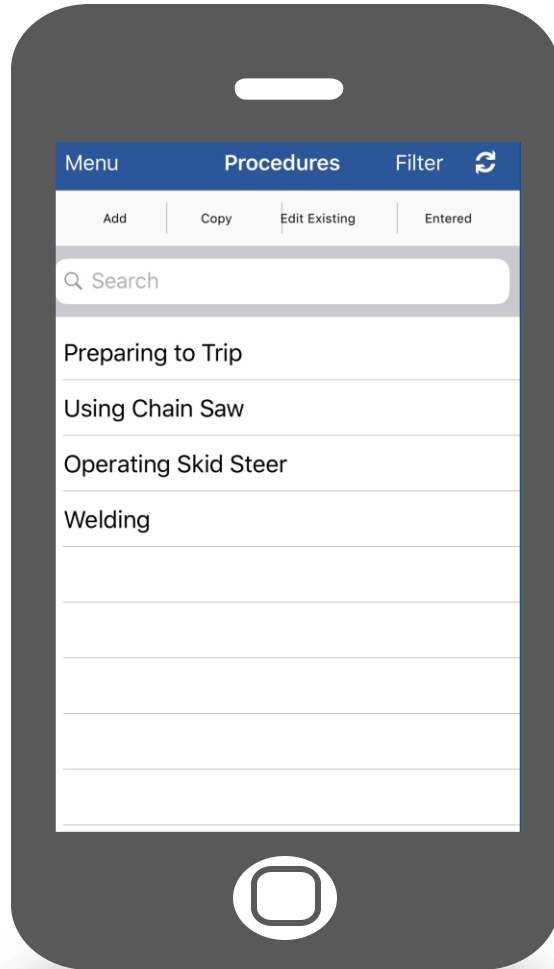
PROCEDURES

Create Procedures
- Add
- Edit
- Create

Self review a Procedure

COMPETENCY

Complete an assessment on the App

Menu **Competency**

- Pending Assessment

Preparing to Trip
Mickey O'Brien - Reviewed - Recertify

Preparing to Trip
Vince Parsons - Reviewed - Recertify
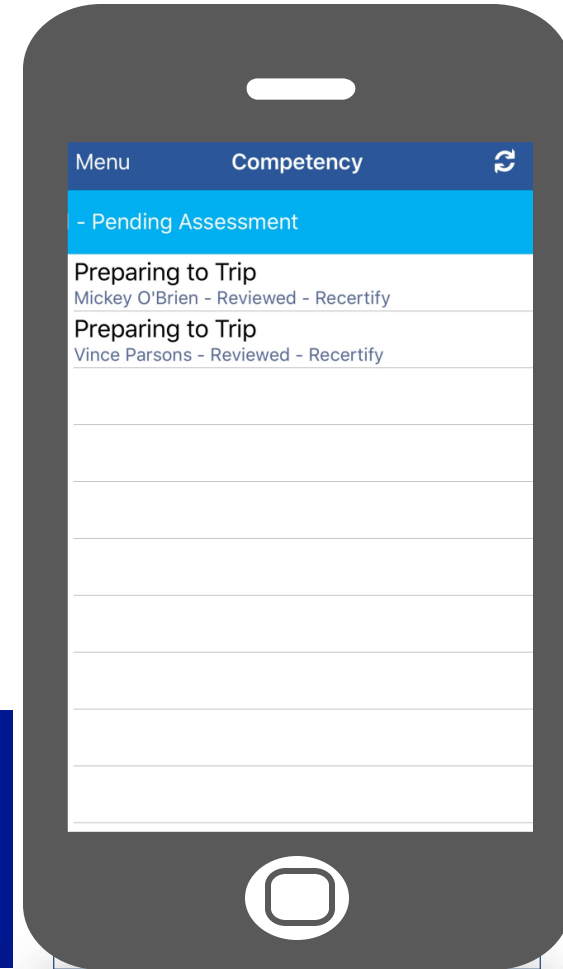
Name

Type

Assessment Type

Group

Potential Risk

Residual Risk

Critical
☐

Applies To
Excavation

Facility
Controls
[Edit]

Other Controls

Competency Roles
[Edit]

PPE/Tools Required
[Edit]

Steps/Tasks
[Add Step] [Reorder Steps]

Section

Name

Description

Notice

Caution

Hazards/Concerns

Potential Risk

Controls/Recommendations

Residual Risk

Attachments
[New Photo] [Existing Photo]

Performed By
[Edit]

1 - Pending Assessment

Preparing to Trip
Mickey O'Brien - Reviewed - Recertify

Preparing to Trip
Vince Parsons - Reviewed - Recertify

1.0 Review JSA

Assessor Comments

Attachments

New Photo Existing Photo

2.0 Fill out trip sheet, Pre trip inspection of equipment, Discuss "kick warning signs while tripping" with crew & shut in procedures relevant to well type (class I, II, etc.)

☐ Direct Observation: Confirm that the employee clears the work area of all debris before starting the trip process.

Attachments

New Photo Existing Photo

Partial   Competent

Procedure Competency And Teams

Competency and Training channel (video)

Questions?

If we do not get an opportunity to respond to your question, we will follow up.

A pdf of the presentation will be in the chat window.

SAFETECH Synergy Schedule! Upcoming Sessions!

- https://neosystems.com/conference-schedule/

2020

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Elevating **QHSE** with Industry Best **Technology**
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Available on
Microsoft AppSource

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