Outreach Portal User Guide
For Trainers

National Resource Center – West Virginia University
National Labor College
3604 Collins Ferry Road PO Box 6615,
Morgantown, WV 26506-6615
Phone: 800-626-4748
Fax: 304-293-5905
https://outreachportal.com

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1 Background

1.1 About Outreach Portal
The Outreach Portal is a web-based application that allows authorized Outreach Trainers to submit Outreach Program Reports, manage report data, and submit payment for processing Outreach student course completion cards. The Outreach Portal also has administrative functionalities to allow Outreach Administrators (Admins) to monitor Trainer activities, manage courses and Trainers, and process Outreach student course completion cards.

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

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

2 Getting Started

2.1 Entering Outreach Portal

i. Enter your email and password in the top banner to log in to Outreach Portal Home page.

ii. Click the “Log in” button after entering approved email address and password for the Outreach Portal.

To retrieve your password or request access Follow This Link

iii. If you have forgotten your password or if you are a new Trainer seeking access to Outreach Portal, click “Follow This Link” to request log in code.

Enter Your Email Address:  
Send Log-in Code
iv. Click the box to enter your email address and click “Send Log-In Code” button to receive code. Once you receive the code in your email, type the code in the box and click “verify code”

Enter that code here to continue

v. Enter new password in the “New Password” box. Enter same password again in the “Enter it again” box and click “Change Password”.

vi. Click “Return to Log in”.

Note: Use trainer email address on file with OTI Education Center.

3 Outreach Portal Home Page – Top Menu Bar

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

3.1 Home

Click “Home” in top menu bar to go to Outreach Portal Home page.
3.2 **Fact Sheet**
Click “Fact Sheet” to be redirected to OSHA Fact Sheet for OSHA Training Institute (OTI) Education Centers.

![OSHA Fact Sheet](image)

**OSHA Training Institute (OTI) Education Centers**
The OSHA Training Institute (OTI) Education Centers are a national network of nonprofit organizations authorized by OSHA to deliver occupational safety and health training to private and public sector workers, supervisors, and employers. These organizations

3.3 **Ed Center Contacts**
Click “Ed Center Contacts” to be redirected to OTI Education Centers (OTIEC) Contact Sheet for all OSHA regions.

![Contact Sheet](image)

[osha.gov/dte/edcenters](http://osha.gov/dte/edcenters)

3.4 **Policies**
Click “Policies” to see policies and procedures for the Outreach Portal.

3.5 **e-Verify**
Click “e-VERIFY” to go to e-Verify page.
a. To verify an authorized OSHA Outreach Student Completion Card, enter First Name, Last Name, Card Number, and click “Verify Card” button.
b. To verify an authorized OSHA Trainer Card, enter First Name, Last Name, Card Number, place a checkmark in the trainer card box and click “Verify Card” button.

Note: Enter name exactly as it appears on card

3.6 Profile
Click “Profile” to go to Profile page.

a. Enter password and click “Change” to change password. A password must be at least eight characters including one uppercase letter, one lowercase letter, one number and a special character.

b. Click “View Your Students” to go to “My Students” report page.

i. Click the date boxes to select reports approved from and to dates, select type of course from the drop-down box and click “Filter Results” button to filter list of reports.
ii. Click “Download XLS of these Students” to download in a spreadsheet.

c. Enter contact information in the applicable boxes and checkmark the languages spoken. Click “Yes, publish my contact information” to be listed on the OSHA.GOV website and click “Update Your Contact Information”.

![Contact Information Form]

**PLEASE NOTE**
OSHA needs your permission to publish your contact information as a trainer on OSHA.GOV. Please check an option below to opt in or opt out:

- [ ] Yes, publish my contact information
- [x] No, do not publish my contact information

**UPDATE YOUR CONTACT INFORMATION**

- FULL LEGAL NAME: Michelle Bradshaw
- NICK-NAME:
- COMPANY/FIRM: Coordinator
- JOB TITLE: Arlington
- ADDRESS: 140 W Mitchell
- ADDRESS 2: Box 19197
- CITY: Arlington
- STATE: TX
- ZIP CODE: 76019
- DAY/OFFICE PHONE: 8172722581
- DAY/OFFICE PHONE EXTENSION: 0765
- HOME PHONE:
- CELL PHONE:
- WEBSITE: http://www.outreachportal.com

**SELECT ALL LANGUAGES IN WHICH YOU TEACH**

- [x] ENGLISH
- [x] SPANISH
- [x] DUTCH
- [x] FRENCH
- [x] GERMAN
- [x] INDONESIAN
- [x] ITALIAN
- [x] PORTUGUESE
- [x] POLISH
- [x] ROMANIAN
- [x] RUSSIAN
- [x] ARABIC
- [x] TURKISH
- [x] HINDI
- [x] VIETNAMESE
- [x] CHINESE
- [x] JAPANESE

[Update Your Contact Information Button]

d. Click “edit” to edit or delete a shipping address. Click “Add a shipping address” to add a new shipping address to the list.
e. Click the font choice and click “Change Font” to change the font preference.

f. Place a checkmark in the box to order a trainer replacement card and click “Order Cards Now”

i. Click “CHECKOUT” to enter shipping address and pay for trainer replacement card.

ii. Click the purple icon under View/Edit to delete order.

iii. Click the red X icon under View/Edit to delete the trainer replacement card request.

iv. Click “Add More Cards To This Order” to add another industry trainer card.

v. Click “Checkout – Choose Shipping Address” to order and pay for card.

g. Click “View My Trainer Card Orders” to check the status of the order
i. Click “Checkout” to pay for trainer replacement card order.

h. Click the box to enter Outreach Portal suggestions or feedback and click “Send”.

4 Home Page – Add Outreach Report

Click “Add Outreach Report” to go to Add Outreach Report page. All Outreach courses taught and course information entered in Outreach Portal must follow OSHA guidelines. Access to adding a particular course will be temporarily suspended after 3 incorrect attempts in entering course information. Do not click the back button. Contact your OTIEC administrator if your account needs to be reset.

4.1 Add Outreach Report Page

a. Course – select from drop down box.

Please avoid using your browser’s “Back” button while adding the report. Doing so may cause the current page to either reload or possibly expire the session.
b. **Number of Students** – enter number of students that completed the course.

![Image of Number of Students field]

```
NUMBER OF STUDENTS
```

\[\text{Number of Students} \]

\[\text{Enter number of students that completed the course.} \]

\[\text{Field} \]

\[\text{Example} \]

\[\text{Number of Students: } 50 \]

\[\text{Complete entry} \]

\[\text{Save} \]

\[\text{Submit} \]

\[\text{Next Step} \]

\[\text{Additional Information} \]

```
\[\text{Start Date/Time} \]
\[\text{End Date/Time} \]
\[\text{Training Site} \]
\[\text{Course Information} \]
```

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

![Image of Course Duration field]

```
\[\text{Start Date/Time} \]
\[\text{End Date/Time} \]
```

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

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

![Image of Training Site form]

```
\[\text{Training Site Name} \]
\[\text{Street Address} \]
\[\text{Address Continued} \]
\[\text{City} \]
\[\text{Country/Location/State} \]
\[\text{Zip Code} \]
```

e. **Course Information** (check all that apply) – select language used for course instruction, if translator was present, if course was taught to youth, and if training was part of an OSHA alliance or partnership.
f. Type of Training Site – select type of training site from list.

![Type of Training Site](image)

- Workplace
- School
- Office
- Hotel
- Union
- Employer Association
- Other

g. Sponsoring Organization – select sponsoring organization from list. When choosing Labor Union button – a drop down box will appear to make your union affiliation choice.

![Sponsoring Organization](image)

- Safety & Health
- Education
- Employer Association
- Employer
- Community
- Labor Union
- N/A

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

![OSHA Outreach Training Program guidelines](image)

I certify that I have conducted this Outreach Training Class in accordance with the OSHA Outreach Training Program guidelines. I have maintained the training records as required by these guidelines and I will provide these records to the OSHA (Directorate of Training and Education) for their (designated) upon request. I understand that if I will be subject to immediate dismissal from the OSHA Outreach Training Program if information provided here is not true and correct. I further understand that providing false information here may subject me to civil and criminal penalties under federal law, including Title 18, U.S.C. Sections 1001 and 1028(a) of the Occupational Safety and Health Act, as amended. This provides criminal penalties for making false statements or representations in any document filed pursuant to that act.

I hereby attest that all provided is true and correct.

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

![Privacy Act Statement and Paperwork Reduction Act Statement](image)
Note: If the report did not meet the number of students’ requirement or was not submitted within the 30 day time limit, an exception box will appear. A reason for the exception request must be entered in the box provided, then click the submit button. You will receive an email with an approval or rejection. If the box is left empty, it will automatically be rejected. See 4.2 exception requests.

j. Click “Next: Add Detailed Hours and/or Students” button to continue entering course information in the "Add Detailed Hours" page after completing Add Program Report page.

k. Select start and end times for each day of class from the drop down boxes and click “Add Hours to Days” button.

l. Page displays hours entered for each day. Click “Change These Hours and Days” to make changes or click “Next: Add Topic Hours” to add topic hours.

4.2 Exception Request
If the exception is approved, an approval email is automatically sent to the trainer. Click Submitted Reports link and click the flagged report to continue.
4.3 Add Topic Hours Page

Course topics and their requirements vary based on type of Outreach course. Total Hours will be automatically calculated at the bottom of the screen. **PLEASE DO NOT HIT THE BACK BUTTON!** Access to adding a particular course will be temporarily suspended after 3 inaccurate or incorrect attempts in entering course information. Contact your OTIEC administrator if your account needs to be reset.

10 Hour Construction Industry Outreach Training example:

```
<table>
<thead>
<tr>
<th>Required</th>
<th>Topic</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hours</td>
<td>Introduction to OSHA</td>
</tr>
<tr>
<td>1 hr.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Focus Four</td>
</tr>
<tr>
<td></td>
<td>Fall Protection</td>
</tr>
<tr>
<td>1 hr. 30 min.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Electrical</td>
</tr>
<tr>
<td>1 hr.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Struck By</td>
</tr>
<tr>
<td>1 hr. 30 min.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Caught in / between</td>
</tr>
<tr>
<td>1 hr.</td>
<td></td>
</tr>
<tr>
<td>5.00</td>
<td></td>
</tr>
<tr>
<td>30 min.</td>
<td>Personal Protective and Lifesaving Equipment</td>
</tr>
<tr>
<td>45 min.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Elective</th>
<th>Topic</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hours</td>
<td>Materials Handling, Storage, Use and Disposal</td>
</tr>
<tr>
<td>45 min.</td>
<td></td>
</tr>
<tr>
<td>45 min.</td>
<td>Tools - hand and power</td>
</tr>
<tr>
<td>0</td>
<td></td>
</tr>
<tr>
<td>0</td>
<td>Scaffolds</td>
</tr>
<tr>
<td>30 min.</td>
<td>Cranes, Derricks, Hoists, Elevators, and Conveyors</td>
</tr>
<tr>
<td>45 min.</td>
<td>Excavations</td>
</tr>
<tr>
<td></td>
<td>Stairways and Ladders</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Optional</th>
<th>Topic</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hours</td>
<td>JHA</td>
</tr>
<tr>
<td>1 hr.</td>
<td></td>
</tr>
<tr>
<td>Hours</td>
<td>Record keeping</td>
</tr>
<tr>
<td>30 min.</td>
<td></td>
</tr>
<tr>
<td>0</td>
<td></td>
</tr>
<tr>
<td>0</td>
<td></td>
</tr>
<tr>
<td>11.50</td>
<td>Total Hours</td>
</tr>
</tbody>
</table>

Next: Add Students
```
a. **Required Topic information** – select instruction time for each topic from the drop down boxes.
b. **Elective Topic information** – select instruction time for each topic from the drop down boxes.
c. **Optional Topic information** – select instruction time for each topic from the drop down boxes. Manually type the topic taught in the box.
d. **Check carefully for course information accuracy before proceeding.**
e. Click “Next: Add Students” button to continue entering course information in the Add Students page after completing Add Topic Hours page.

**Note:** Names of the students must be entered for report to be considered complete. Please do not click the back button.

### 4.4 Add Students Page
Student information can be added to the Outreach Portal by uploading an Excel file or by entering manually.

a. **Uploading an Excel file**

i. Click “Choose File” to select Excel file. Excel file must follow specified format.

ii. Click “Upload XLSX” to upload selected file.

iii. Make changes to the names and click “Add These Students”. If no changes need to be made to the name, click “Add These Students”.

iv. Check spelling of students’ names and click “Next: Request Cards for these Students” to go to shipping and payment page or click “Back: Edit your students” to edit names.

b. **Entering information manually**

i. First Name and Last Name fields are required. Middle initial, Suffix, and email fields are optional. Note: student email information is trainer information only.
ii. Names of students will be printed on the outreach cards as they are entered into the portal. Check spelling of the students’ names carefully.

c. **Check names carefully for accuracy before proceeding.**

d. Click “Submit” button when you have completed and verified your entry. If you do not complete payment after clicking “Submit” button, you may return to the Outreach Portal to pay at a later time. *See Section 4.6 Request Cards Page.*

e. Check spelling of students’ names and click “Next: Request Cards for these Students” to go to shipping and payment page or click “Back: Edit your students” to edit names.

### 4.5 Students Confirmation Page

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

### 4.6 Request Cards Page

a. Reach this page from Students Confirmation page or by clicking “Pay for Cards” icon in Submitted Reports View List page.

b. Ship cards to Trainer address on file – click “Send Cards To This Address” button next to shipping address to go to Pay for Cards page.

i. It is possible to have multiple shipping addresses on file for selection.

ii. Click “Delete” icon to delete an unwanted shipping address.
c. Ship cards to a new shipping address

**Add a new shipping address**
(For Express Services Please Do Not Enter A PO Box Address)

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address</td>
<td></td>
</tr>
<tr>
<td>Address 2</td>
<td></td>
</tr>
<tr>
<td>City</td>
<td></td>
</tr>
<tr>
<td>State</td>
<td></td>
</tr>
<tr>
<td>Country</td>
<td></td>
</tr>
<tr>
<td>Zip</td>
<td></td>
</tr>
<tr>
<td>Phone</td>
<td></td>
</tr>
</tbody>
</table>

Enter A New Shipping Address

Enter new address and click “Enter A New Shipping Address” button.

Click “Send Cards To This Address” button next to the new address entered to go to “Pay for Cards” page.

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

### 4.7 Pay for Cards Page

a. Pay for cards by credit card

i. Click “Pay For Your Card Order by Credit Card” button to go to Click Here To Pay page.

If the above information looks OK, please continue by submitting below. Cards will be printed and shipped to the above address on approval.

Choose to pay by credit card.

Click Here To Pay by Credit Card

ii. Click “Click Here To Pay” button in Click Here To Pay page to go to Credit Card Information page.

iii. Enter credit card number, select credit card type and credit card expiration date from the drop down boxes, and click “>> Continue” button in Credit Card Information page or click “Reset” to clear credit card information entered to reenter credit card information.
b. Pay for cards by Purchase ID – Purchase ID (Purchase Orders) can be set up for organizations with multiple Outreach Trainers. Contact your OTIEC administrator to set up Purchase ID or for more information.

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

If the above information looks OK. please continue by submitting below. Cards will be printed and shipped to the above address on approval.

Choose to pay by credit card.

Pay For Your Card Order by Credit Card

OR

Choose to pay by “Purchase ID.”

Pay For Your Card Order by Purchase ID

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

5 Home Page – Submitted Reports

Click “Submitted Reports” to go to Submitted Reports List page.
5.1 **Icon Legend**
See icon legend in Submitted Reports List page. Click icon in “View” column to select available action for a submitted course.

![Icon Legend Image]

5.2 **Incomplete Report**
   a. Click icon in Submitted Reports List page to see an incomplete course report entered in Report Submission page.
      i. Click “Edit this Report” near the bottom of the page to edit or continue entering a report.

   ![Incomplete Report Image]

   **Approval:** Pending

   **NOTE:** You may not edit the number of students on a paid report.

   b. Click “Portal Report Detail PDF” button in Report Submission page to be redirected to report in PDF format.
   c. Click “OSHA Format PDF” button in Report Submission page to be redirected to report in OSHA Format PDF.
   d. Click “XLS Format” to open in XLS Format.

5.3 **Entered Report Detail**
   a. Click icon in Submitted Report List page to see a course report entered in Report Submission page.
   b. Click “Portal Report Detail PDF” button in Report Submission page to be redirected to the report in PDF format.
5.4 **Flagged Reports**

a. Click flagged icon to edit days and times for rejected report or to continue report entry for approved exception requests.

![Flagged Reports Table]

5.5 **Pay for Cards**

a. Click “Pay For Cards” icon in View column on Submitted Report List page to pay for cards. See section 4.6.

![Pay for Cards Example]

5.6 **Paid**

a. Click “Paid” icon in Submitted Reports List page to see a paid course report entered in Report Submission page.

![Paid Report Example]

b. Click “Portal Report Detail PDF” button in Submitted Report page to be redirected to report in PDF format.

5.7 **Add Files**

a. Click “File Name” box to name the document added. Click “Choose File” to choose the file being uploaded and click “Upload File”.

![Add Files Interface]

b. Click the blue arrow to open saved file

c. Click red X to delete saved file

Note: PDF files only. Photocopies of front and back of the outreach cards will automatically save in the Outreach Report if UTA prints the cards.
5.8 **Add Tracking Number**

a. Click “Tracking” and enter tracking number into the box and click “Add Tracking Number”.

```
Tracking: [Input field]  Add Tracking Number
```

Note: USPS, UPS, and FedEx will automatically link to their website tracking pages.

5.9 **Deleted Report**

a. Click “Delete” icon in “View” column of Submitted Reports List page to view a deleted course report entered in Report Submission page.

<table>
<thead>
<tr>
<th>VIEW</th>
<th>REPORT NUMBER</th>
<th>COURSE</th>
<th>CITY</th>
<th>STATE</th>
<th>SUBMITTED</th>
<th>PAID</th>
<th>APPROVED</th>
<th>TRANSACTION ID</th>
<th>INSTITUTE</th>
</tr>
</thead>
<tbody>
<tr>
<td>X</td>
<td>12345</td>
<td>30 hr Construction Industry Outreach Training</td>
<td>ABC</td>
<td>TX</td>
<td>Today</td>
<td>No</td>
<td>No</td>
<td>612345612345</td>
<td>The University of Texas at Arlington</td>
</tr>
</tbody>
</table>

6 **Home Page – Replacement Cards**

Click “Replacement Cards” to go to Replacement Cards Request Queue.

6.1 **Request Replacement Cards**

Click “CLICK HERE” in Replacement Card Request Queue page to go to Student List of paid reports page.

```
REPLACEMENT CARD REQUEST QUEUE

CLICK HERE to request a replacement card for a specific student or to add an additional student to your queue.
```

a. Click the arrow icon next to name of student in Paid Students List page to request a replacement card in the Submitted Report page. If the student is not listed and is “pre-portal”, add student manually. *See section 5 Submitted Report page.*
NOTE: Trainer replacement card requests. See section 3.6g Profile

6.2 Pay for Replacement Cards Requested
Replacement cards requested are listed in Replacement Card Request Queue page.

a. Select reason for requesting replacement card from drop down box and click the "Update" button.

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

i. Click the red X to delete replacement request.

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

iii. Correct data entry error and click "Submit".

iv. Click the “In Cart/Pay Now” button to go to Request Cards page.

6.3 Requested Replacement Card Report Summary Page
Click report detail icon in Replacement Card Request Queue page to go to Requested Replacement Card Report Summary page.
7 Frequently Asked Questions (FAQs)

1. Who can I contact for assistance with the Outreach Portal?
   Please contact the OSHA Education Center at the National Resource Center West Virginia University at 800-626-4748.

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

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

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

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

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

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

8. If I have questions, how can I get support?
   Please contact the OSHA Education Center at the National Resource Center West Virginia University at 800-626-4748.