

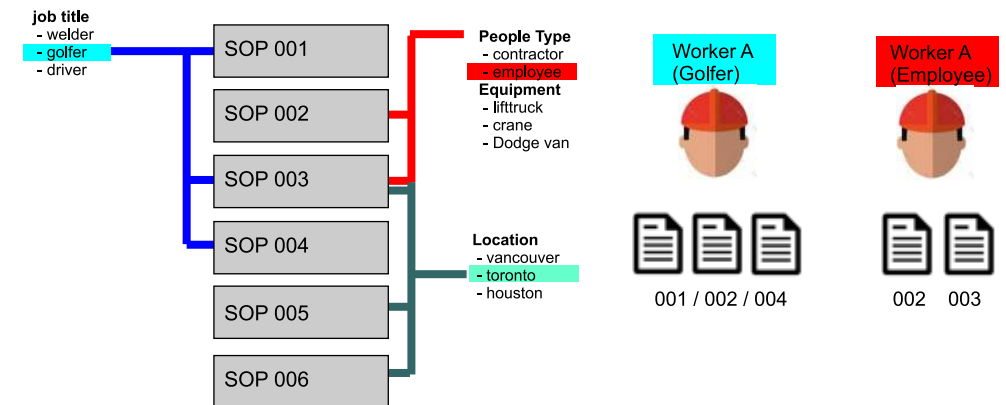
2018.03.26 review of BPCI module design

Focus:

- properties of BPCI's
- assignment
- delivery
- acknowledgment input - worker or SPV/WTL
- innovation fields
- reporting / escalation
- alerting

questions

- practical demo scheduling
- observation by video body camera? store?
- workable by email addresses for sale outside ST?
- contractor training/compliance/verification by camera
- inspections???? create checklists, how to save details



ASSIGNMENTS

Documents are assigned via the BPCI module assignments page.

Students get BPCI based on their job title, people type, Loc/Dept, WT, or individual assignment.

job title
- welder
- golfer
- driver
Location
- vancouver
- toronto
- houston
People Type
- contractor
- employee
Equipment
- liftruck
- crane
- Dodge van

SOP 001

SOP 002

SOP 003

SOP 004

Worker A
(Golfer)



Worker A
(Employee)



001 / 002 / 004



1 Alert sent to all assigned workers to login and review/acknowledge in the Training Center

OR

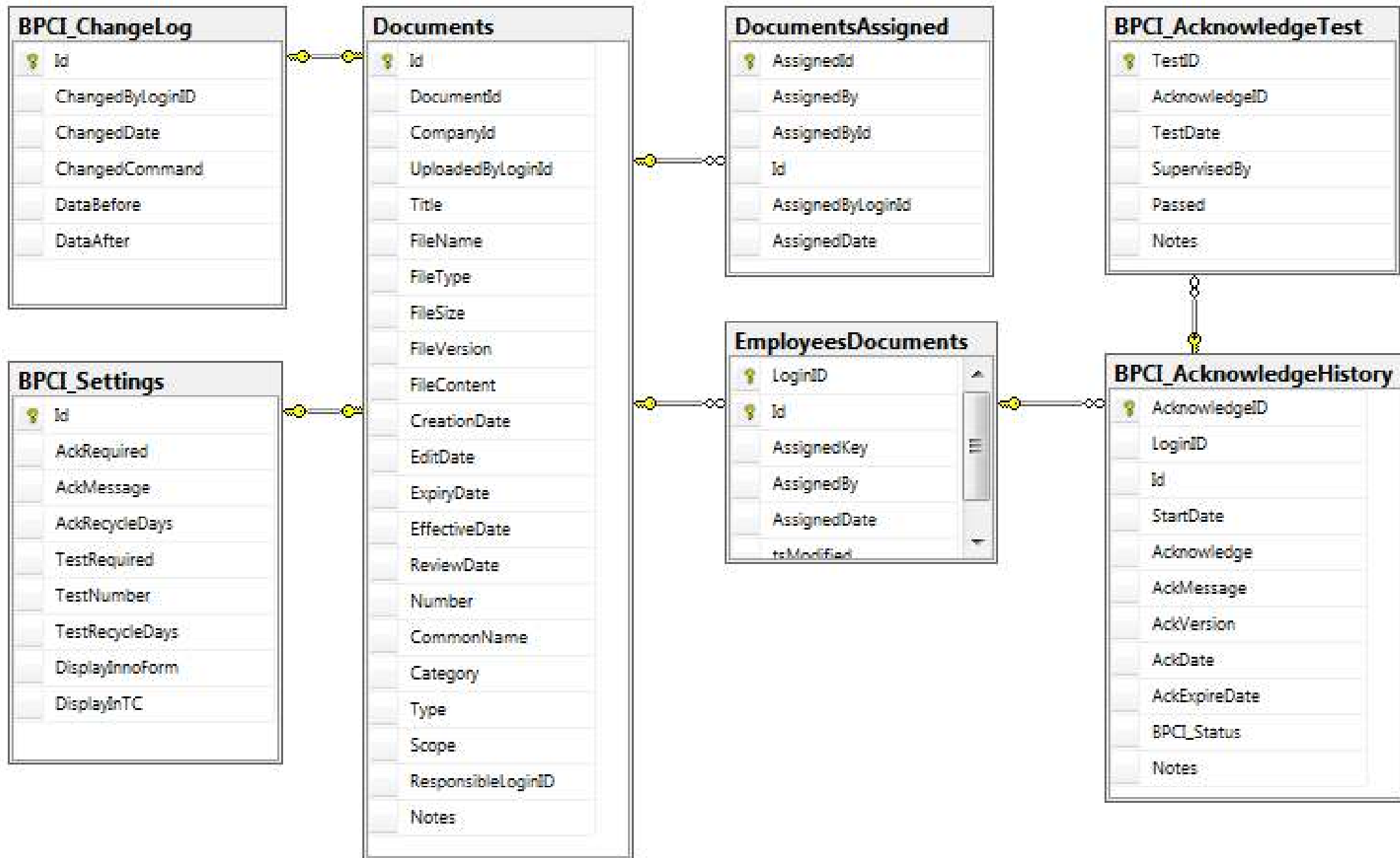
2

Alerts sent to SPV/WTL only who uses 'Add Scores' page to enter completions for workers. I added a 'practical test' checkbox field to the dbase. Only a SPV or WTL should be able to access this field on forms to confirm the student has completed a practical test. A document should be available to the supervisor who may want to upload it attached to the student record. This would be a checklist form of the items the student demonstrated.

See next page



BPCI's only appear in a new TC tab and are not treated as a course.



2018.05.31 some ID field names to change, two more tables may be needed in the future to hold custom movies and quiz items.

This may now be old and out of alignment with the new table structure

Use drop down boxes to keep form simple

In the best case we should let them set the name 'SOP' or 'Best Practice' etc.

pointer to file

Drop down boxes

Best Practice - Continous Improvement

Persons Assigned: {258} Current compliance: 87%

Title:

Common Name:

Number:

Version#:

Type:

Category:

Scope:

Responsible:

File:

Attachment(s):

Date Details:

Acknowledgement

Notes

View Change Log

Cancel

Save

how to add/delete/edit?

Attachment(s):

http://www.kccsoft.com/howto.pdf

+

-

http://www.kccsoft.com/howto2.pdf

+

-

http://www.kccsoft.com/howto3.pdf

+

-

+

-

Date Details:

Created:

Effective:

Last Updated:

Review:

Expires:

Acknowledgements

☐ Require acknowledgment (customize below)

I hereby acknowledge that I have read, understood, and will comply with this {best practice} Title: zzzzzzzzzz Version: 1 Dated (Effective date).

Acknowledgment is ☒ one time ☐ repeat every 730 days.

☐ Display innovation input form on acknowledgment page.

☐ Make publicly available to assigned staff in the Training Centre login page.

☐ Requires practical demonstration of understanding within 30 days to be complete

BPCI_Documents table fields

BPCI_Acknowledgements table (exists now under another name?)

Changelog

| | | |
|------------|--------------------------------------|------------|
| 2016.02.14 | acknowledge message edited | King, Bill |
| 2016.07.12 | version number changed 1.2 to 1.3 | Singh, J. |
| 2017.11.16 | changed the procedure to include.... | King, Bill |
| | | |

Read only changelog (audit trail), For legal reasons we must track all changes, especially to the ack message.

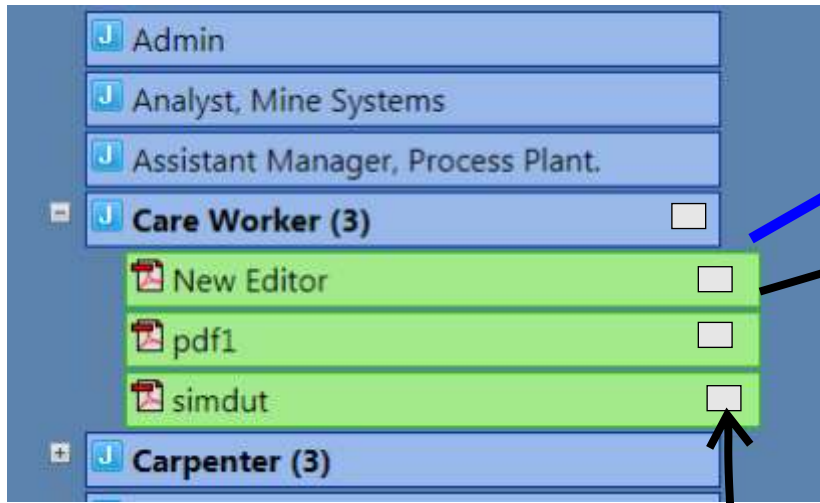
Notes: (row by row?)

| | | | | |
|------------|--------------------------------------|------------|---|---|
| 2016.02.14 | created sop | King, Bill | + | - |
| 2016.07.12 | version 1.2 created | Singh, J. | + | - |
| 2017.11.16 | changed the procedure to include.... | King, Bill | + | - |
| | | | | |

Notes

Here are the notes for this item...

Cancel / Save



no pauses between, all are due now, but maybe are sequenced

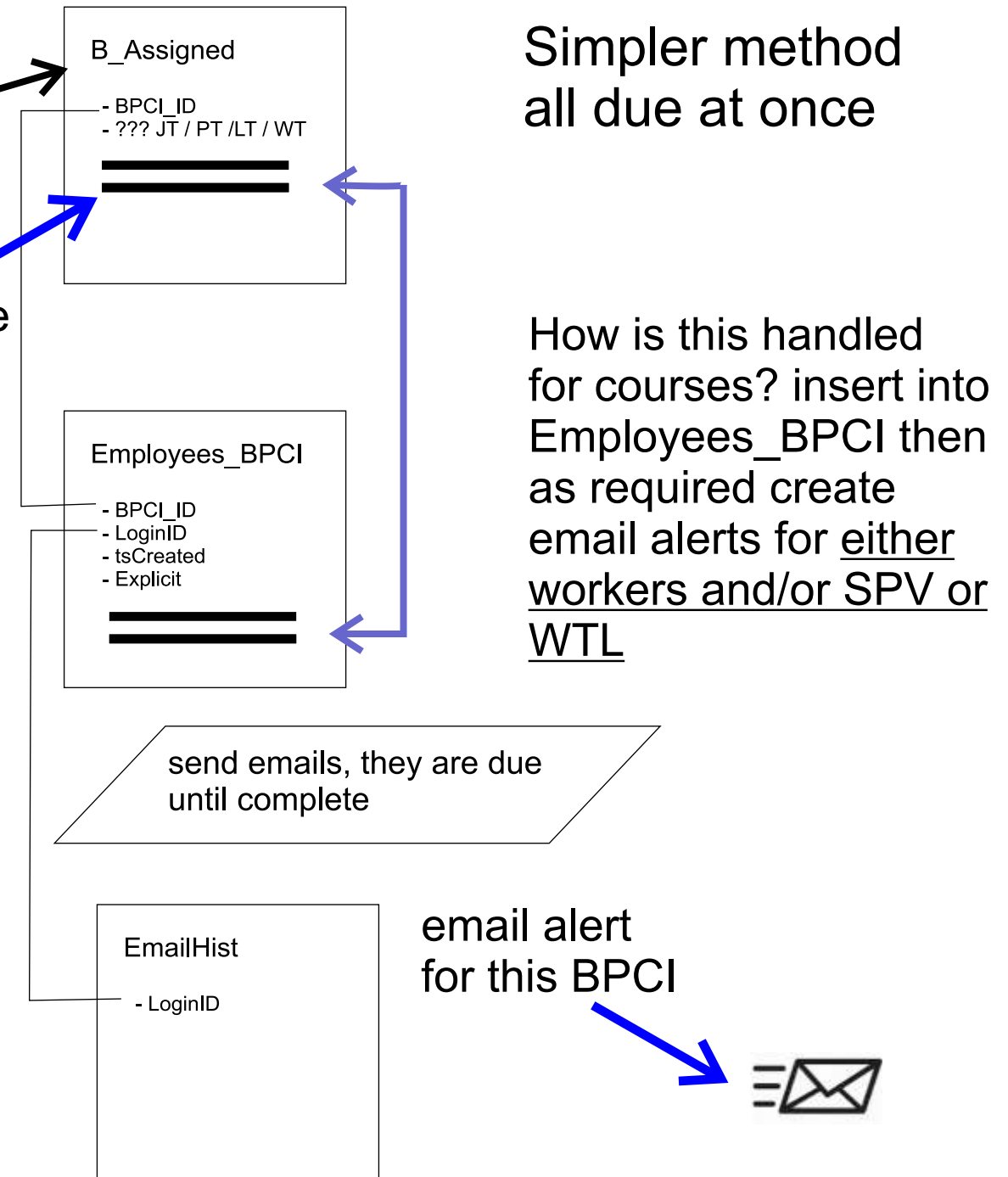
email alert for this BPCI

due today

Add a new date field for future possible use

what happens if there is a 'recycle' on these items, like 365 days? All dates would have to be recalculated

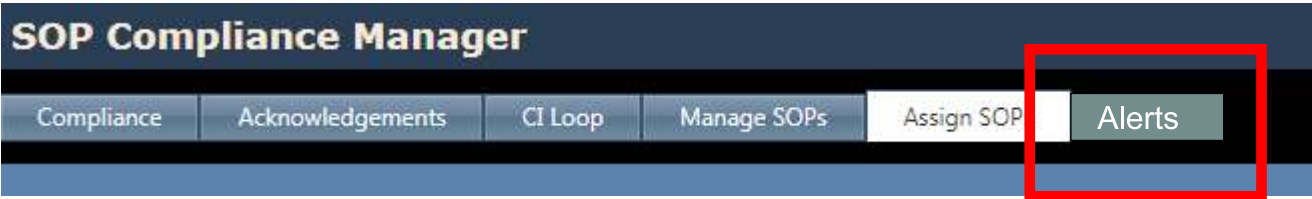
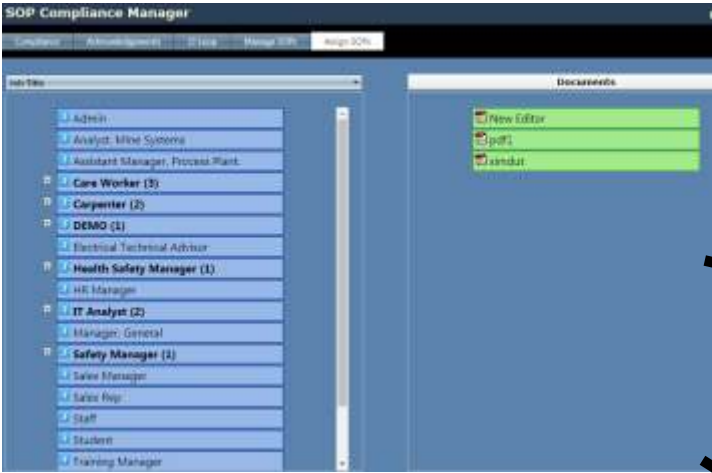
simpler method, all are assigned at once and due at once. The manager gets an accurate report of 'due' and compliance. The user could do all items the same day (not good).



Documents upload form. Modify form to upload BP and documents using the same fields.

PDF upload

- type = document - attach to some object, these items can be assigned in the normal assignments page and may appear in a TC tab but do not get acknowledged or show innovation functions. They open on their own.
- type = BPCI - appears in BPCI module for assignment, alerting, compliance, assigned from the BP manager, may require acknowledgment. They open in an HTML template and may have acknowledgment function on. In the future they may be assigned to courses.



DECISION:
SEND TO
EITHER SPV/WTL's
OR Workers



Alert to SPV or WTL contains a list of persons assigned to an BPCI(s). SPV or WTL is expected to present the BPCI then 'add scores' to record compliance. How can we get a statement of compliance from each? Signature? Or they input their personal password?

Contains a link to open the U2C / BCPI.

Let's add a new tab for 'Alerts'. Then show the alerts on the screen with customizable messages.

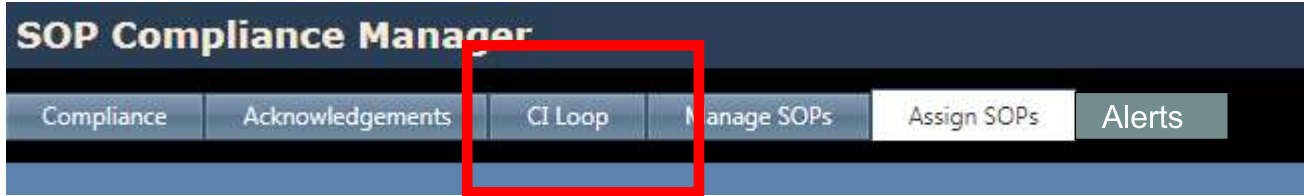


Alert to workers contains a link to login and run the U2C that contains the BPCI(s). The worker is expected to acknowledge the BPCI.

[Click here to open/review BPCI #455 Welding Fumes](#)

On assignment alerts:

See the next page for alerts. It would be good to have a manual method or button here to be able to edit a message then send.



Current Design Issues and questions 20180531:

- automatic alerting on 'assigned' - send to SPV/WTL or Workers?
- The CI loop - was meant for innovations. What to do with it now? Hide it? It is good for marketing.
- for SPV/WTL group acknowledgment input, the ability to take a picture of the group might be effective (as well as a signature panel)



Alert to SPV or WTL contains a list of persons assigned to an BPCI(s). SPV or WTL is expected to present the BPCI then 'add scores' to record compliance. How can we get a statement of compliance from each? Signature? Or they input their personal password?

Contains a link to open the U2C / BPCI



Alert to workers contains a link to login and run the U2C that contains the BPCI(s). The worker is expected to acknowledge the BPCI

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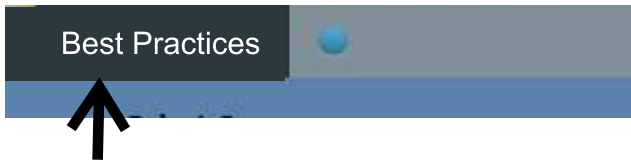
We need to add a BPCI's tab to 'add scores'

We need to test it thoroughly on smart phones

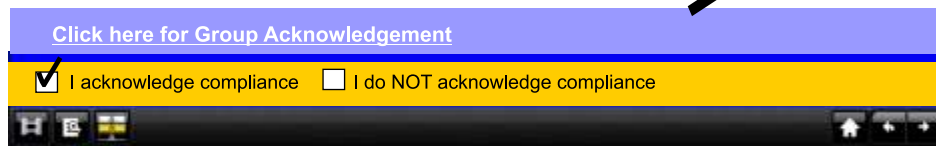
SPV / WTL input step:



I'm still thinking about this, but I think it may be best to have a separate tab called 'Best Practices' so we can keep this separate from training.



~~Lists BPCI's like courses. In the BPCI an acknowledge bar appears at the bottom for everyone (if turned on). If the logged in user is a SPV/WTL another blue band appears for 'Group Acknowledgement'.~~



Color coding: either ■ acknowledged ■ expiring<90 ■ non-acknowledgement

[illegible]

If desired, he may open the drop down to record a signature (how to input?) in jpg format, check the practical demonstration checkbox and (autoinsert) date, and to add any 'notes' which could be legally important (id the worker did poorly on using the equipment)

BPCI 443 Welding Fumes v1.1 2018.04.02

I acknowledge I have read and understood and will comply with....

- ☐ Ron Ramsey 4342

□ Practical demonstration completed 2018.04.19 ■

Verified by: {supervisor name/loginID}

Save





For simplest use the form would just look like this, with the SPV / WTL checking the checkboxes.

Note: they may just do this on the delivery of the BPCI but the practical demonstration is scheduled / alerted for a later date (30 or 90 days, etc.).








If they check the acknowledgement it will go green. But if it requires a practical, the checkmark will not appear until the practical is done.

So we really need two levels of alerting, when due for the BPCI and until acknow., then another alert when the practical demo is due.

The SPV/WTL would return to this form and open up the detail panel and insert the practical demonstration date/time, at which time the checkbox on the green box appears.

Color coding: either  acknowledged but practical test not complete  acknowledged  expiring<90  non-acknowledgement

BPCI 443 Welding Fumes v1.1 2018.04.02
(read only Acknowledgement message)
I acknowledge I have read and understood and will comply with....

| | <u>Name</u> | <u>LoginID</u> | <u>Last Ack.</u> | <u>By</u> | ✓ <u>Practical</u> |
|---|-------------------|----------------|------------------|----------------|--------------------|
|  | + Ron Ramsey | 4342 | 2018.02.03 | Ron Ramsey | 2018.02.03 |
|  | + Javier Martinez | 9989d | 2016.07.13 | George Dan WTL | ----- |
|  | + Bill Poole | 8878 | 2012.04.02 | Bill Poole | ----- |
|  | + Roger Whittaker | 98989 | ----- | | |
|  | + Harry Leman | 443 | ----- | | |
|  | + Suzy Snow | snows | 2011.09.22 | Suzy Snow | 2018.02.03 |
|  | + Laura Pickering | 1917 | 2017.03.12 | Roger Shaw SPV | ----- |

*I, Bill King, Supervisor, verify by clicking 'Submit' below that the persons checked above have been informed of and have indicated to me their understanding of **BCPI 443 Welding Fumes v1.1 2018.04.02** and their intention to comply fully with the information contained within.*

4 acknowledgements submitted by Bill King 2018.04.30 3:31PM

Cancel Submit

This message would have to be adjustable by the company.

The practical column and checkbox does not appear if not turned on

Acknowledge - loginID / workstation / inputBy / DT / SOPID / SOPName / Version / Expires / NextDue / BiometricID / Notes?
*notify manager somehow if notes added

There can be three responses:

- Acknowledged
- No response (waiting)
- Non-acknowledgment (refusal)

Do we do anything if the worker just doesn't click either? He/She will still be 'due'.

Need practical test version for SPV/WTL

use video upload?

✓ Acknowledgment

I acknowledge that I have read, understood, and will comply with SOP# {224} {name} version {}.

{Worker Name} {LoginID} {DT}

Optional Comments:

✗ Cancel

✓ Send

Form opens with the full customizable company text for confirmation. Once we receive the worker ack we need to keep that text from being edited.

ADD INNOVATION

☒ I acknowledge compliance

☐ I do NOT acknowledge compliance

Should be radio buttons by standards, but mutually exclusive checkboxes look better. Only one can be checked at a time and opens the related form.

Acknowledge - loginID / workstation / inputBy / DT / SOPID / SOPName / Version / Expires / NextDue / BiometricID / Notes?
*notify manager somehow if notes added

✖ Non - Acknowledgment

I am not able to acknowledge that I have read, understood, and will comply with SOP# {224} {name} version {}.

{Worker Name} {LoginID} {DT}

To help us improve this procedure, please detail reason(s):

Note: A refusal reason is mandatory.

✖ Cancel

✔ Send

Form opens with the full customizable company text for confirmation. Once we receive the worker ack we need to keep that text from being edited.

Note: The SEND button is dimmed until the text field has data in it. We need a reason for non compliance.








☐ I acknowledge compliance

☒ I do NOT acknowledge compliance

Should be radio buttons by standards, but mutually exclusive checkboxes look better. Only one can be checked.




Should the user be able to set this period when the assigned BP is overdue when not acknowledged?

Status of the BPCI:

- 1. created  (white)
- 2. assignment/notification to assigned persons - autonotify or manual  (grey) if > 30 days  without acknowledgement
- 3. acknowledgment or refusal - compliant or non-compliant 
- 5. IF the BPCI has a practical test a full green  box appears when complete, otherwise it shows compliant but incomplete in lists
- 4. non acknowledgment or refusal (pending. non-compliant) 
- 5. acknowledged with notes (needs manager response and closure)
- 6. refusal (needs manager response and closure) (non compliant)
- 7. if the BPCI recycles, it goes yellow 60 days prior and shows up on due lists 




Initial state

=====

-  Assigned
-  Notified
-  Notified > 30 days without ack.





Compliant

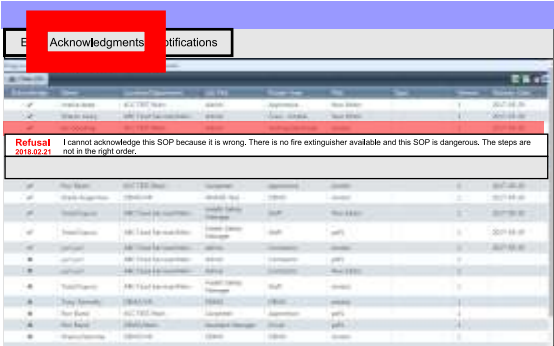
=====

-  Acknowledged
-  Acknowledged, waiting for practical test
-  Acknowledged with notes

Non compliant

=====

-   Created or Notified
-  Pending
-  Refusal with notes



Can we change the row background color if there are notes that have not been responded to?

We should review these color codings!

Acknowledgments page:



On entering the page I think it should be grouped on BPCI name. What would be very effective is a chart in each showing compliance level.

Acknowledge / Name / LoginID / Loc-Dept **OR** WorkTeam/ Title / BPCI# / Version / Ack Date/ **Last Practical Date** (if turned on)
Can we turn off some of these columns in telerik? They may want loc or work team, and may want Job Title or People Type as well.

We should use the standard color codings instead of checkmarks.

| Acknowledge | Name | Location/Department | Job Title | People Type | Title | Type | Version | Acknow. Date |
|-------------|-----------------|------------------------|------------|----------------------|------------|------|---------|--------------|
| | charlie delta | KCC TEST/Main | Admin | Apprentice | New Editor | | 1 | 2017-05-29 |
| | Sharon Avery | ABC Food Services/Main | Admin | Crew - mobile | New Editor | | 1 | 2017-05-29 |
| | Ian Gooding | KCC TEST/Main | Admin | Visiting Electrician | simdut | | 1 | 2017-05-29 |
| | Jav Mar | KCC TEST/Main | Carpenter | Apprentice | pdf1 | | 1 | 2017-05-29 |
| | Javier Martinez | KCC TEST/Main | Carpenter | Location Manager | New Editor | | 1 | 2017-05-29 |
| | Joe Crumbaugh | ABC Food Services/Main | HR Manager | HR Manager | pdf1 | | 1 | 2017-05-29 |
| | Ron Eland | KCC TEST/Main | Carpenter | Apprentice | simdut | | 1 | 2017-05-29 |
| | Sheila Angerman | DEMO/HR | WHMIS Test | DEMO | simdut | | 1 | 2017-05-29 |
| | Peter Fenrich | ABC Food Services/Main | Admin | Apprentice | simdut | | 1 | 2017-05-29 |

Acknowledgment features

Here is what the received acknowledgment looks like to the manager:

Reply to: Sharon.Avery@cobre.com

I understand Sharon, I'll clarify this in the next version.

or is there another way to do this email?

Cancel

Send

Reply sends an email then pastes a notes trail in below.

Manager notes is a field for the manager to put comments.

Status is manually set.

- assigned
- assigned and notified
- notified > 30 days not acknowledged (overdue)
- acknowledged (no practical) = closed
- acknowledged with practical done= closed
- Ack with no practical or failed
- ack with comments = open (after reply the manager should set to closed)
- Ack is expired
- Ack is within 60 days of expiry (red overrides)

| | | | | |
|---|--|------------------------|-----------|--------|
| X Filter Off | | | | |
| Acknowledge | Name | Location/Department | Job Title | People |
| + <div></div> | charlie delta | KCC TEST/Main | Admin | App |
| - <div></div> | Sharon Avery | ABC Food Services/Main | Admin | Crew |
| Ack Text: | I refuse to acknowledge that I have read, understood and will comply... | | | |
| Notes: Reply | I had a problem understanding this SOP. It's not very clear. {2018.02.12 12:10pm} | | | |
| Replied 2018.02.12 | I understand Sharon, I'll clarify this in the next version. {Sent 2018.02.12. 12:34pm} | | | |
| Ack Text: | I acknowledge that I have read, understood and will comply... | | | |
| Replied 2018.02.12 | We have updated this SOP and made the changes you asked for, thank you. {Sent 2018.02.12. 12:34pm by Tom King} | | | |
| Practical 2018.02.12 | Failed. Worker did not understand the correct sequence. {Sent 2018.02.12. 12:34pm by Tom King} | | | |
| Practical 2018.02.12 | Passed. Worker now understands. {Sent 2018.02.12. 12:34pm by Tom King} | | | |
| Manager Notes | Manager lists any corrective action taken here (used later for reports). Record who entered and date/time. | | | |
| Set status: <div>Closed</div> can be: Open / On-hold / Closed | | | | |

- Normal ack, no notes (green checkmark)
- If the user refuses this is written here and status goes red. If they then acknowledge this is inserted to another row, and the status is green.
- Practicals are inserted as they are done.
- How do we alert on late ones?
- When the record 'recycles' closed records are moved to history and a fresh empty one inserted. Records that are red however and not 'closed' do not recycle until manually closed. We need to alert on those.

SOP Compliance Manager

Ron Eland

Compliance

Acknowledgements

CI Loop

Manage SOPs

Assign SOPs

Add new document

Compliant

Non-compliant

Refresh

put delete function into 'edit' form

| | | | | Effective | Review | Expires | Assignees | Scope | Compliance Level | | | |
|-------------|------------|-------------|---|-----------|------------|------------|-----------|------------|------------------|-----------------|-----------------|-------------------------|
| <div></div> | New Editor | | 1 | 2018/6/30 | 2017/5/31 | 2018.03.30 | 288 | Company | <div></div> | Javier Martinez | <div>View</div> | <div></div> <div></div> |
| <div></div> | simdut | <div></div> | 1 | 2017/5/27 | 2018.05.30 | 1900/1/1 | 193 | Work Teams | <div></div> | Javier Martinez | <div>View</div> | <div></div> <div></div> |
| <div></div> | pdf1 | <div></div> | 1 | 1900/1/1 | 1900/1/1 | 1900/1/1 | 12 | BC | <div></div> | | <div>View</div> | <div></div> <div></div> |

This page gives a quick readout of important information. We need to be able to sort by:
newest / oldest / most compliant / least compliant / expiry date / responsible / category / scope / type / review date

Filters: expired / review date / type / responsible / ???

Manage SOP's page. What am I missing here?

color coded backgrounds for review and expiry dates

This page gives a quick readout of important information. We need to be able to sort by:
newest / oldest / most compliant / least compliant / expiry date / responsible / category / scope / type / review date

Filters: expired / review date / type / responsible / ???

We should track the notifications in a list - date/time sent, to who, by SOP... where should this go?
On the edit window in a tab?