EDGEauditor

User Guide: Health and Safety

Last Updated: August 11, 2020

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Overview

Welcome to EDGEauditor!

EDGEauditor helps resorts remove their reliance on paper-based forms, waivers and more by transitioning all of these pertinent documents into digital form. Whether you're a small family-operated resort or an operation with thousands of employees, this digitized tool will improve efficiency and accuracy while decreasing administrative overhead and mitigating risk.

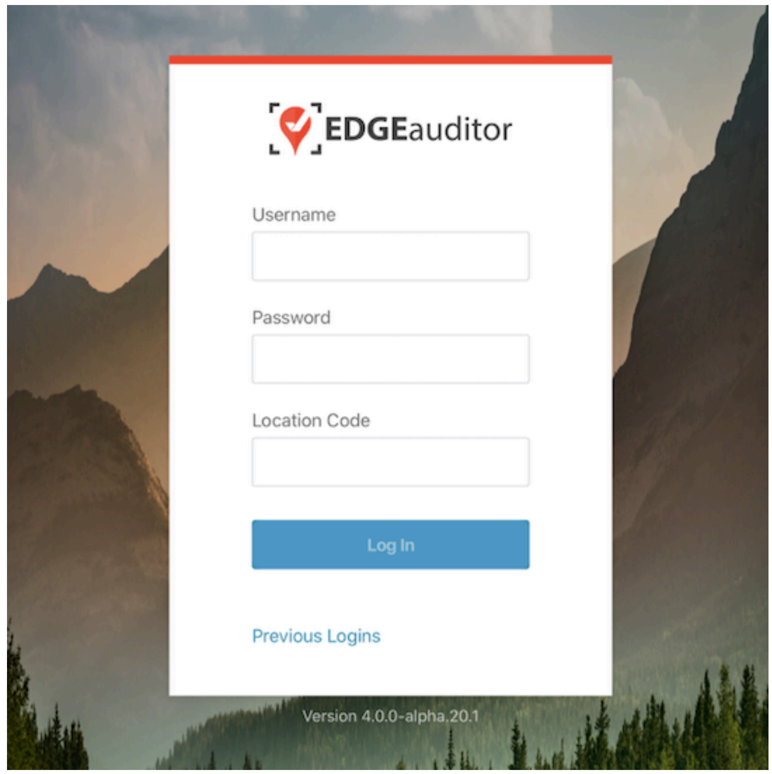
Some of the many benefits to using EDGEauditor are:

- Helping you maintain more consistent, complete and accurate reports with additional information that's just not possible with paper.
- Never having to deal with legacy versions of the software, or people using different versions. EDGEauditor is a SaaS (Software as a Service) solution so every update made to the software is automatically applied to every user.
- Desktop-based manager dashboard provides administrative users with a full 360-degree view of all reports, ability to approve or reject reports, add new sections or criteria to reports, export data and much more!
- Easily manage security and access permissions to each individual user so there's no need to worry about things going missing or being altered.
- Enable email and text alerts for incident reporting based on the criteria you set.
- Saving incident reports, daily logs, inspections and other reports locally on a tablet and then upload later when an internet connection is available.
- Through tablets and smartphones, your staff can start to catalog every piece of risk mitigation you have on your property.

Login

The login screen is a single point of entry into EDGEauditor. The EDGEauditor app is what frontline staff will use to complete safety meetings, trainings and reports. The EDGEauditor manager dashboard is an online website where managers review and approve submitted reports, trainings, meetings and more.

Accessing the EDGEauditor App



Mobile Device:

1. Download the EDGEauditor app from download.edgeauditor.com. You'll want to choose one of the download options that appears directly beneath the EDGEauditor RESORT logo.
2. Launch the app and on the login screen, enter your username, password and location code (case sensitive).
3. Tap the *Log In* button to log into the EDGEauditor application.

IMPORTANT: If you are using an iOS device, before you can access the app for the first time you will need to go into *Settings > General > Profile (or Device Management) > CloudStorm Solutions > Trust "CloudStorm" > Trust*.

Desktop Computer:

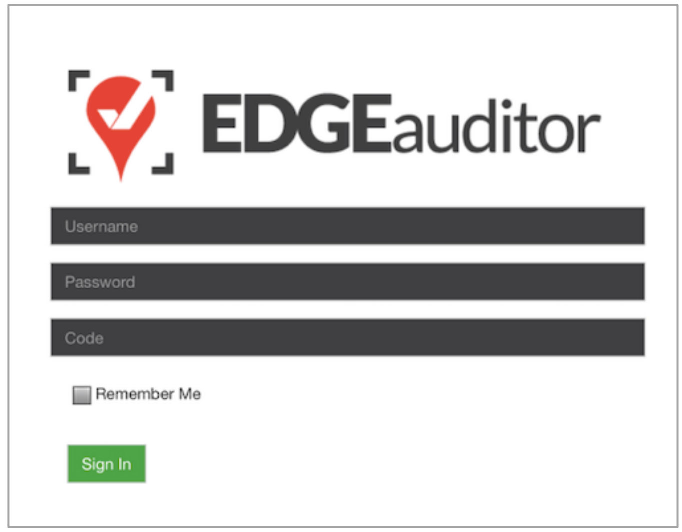
1. Open Chrome browser and go to browser.edgeauditor.com.
2. On the login screen, enter your username, password and location code (case sensitive).
3. Click the 'Log In' button to log into the EDGEauditor application.

EDGEauditor

Accessing the EDGEauditor Manager Dashboard

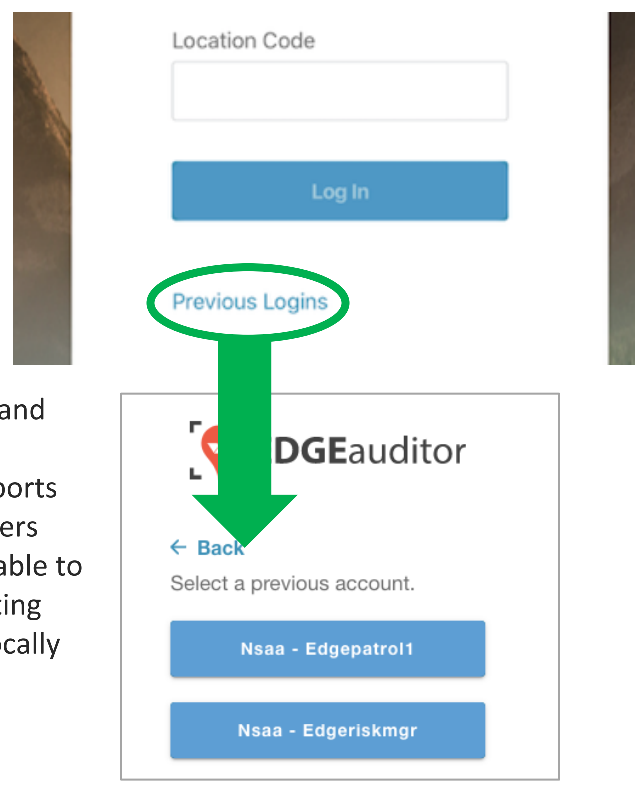
Desktop Computer:

1. Open Chrome browser and go to resort.edgeauditor.com.
2. On the login screen, enter your username, password and location code (case sensitive).
3. Click the *Sign In* button to log into the website.



Additional Notes

- Both the manager dashboard and the browser-based version of the app are optimized to work with Chrome browser.
- On the EDGEauditor app, if a previous login is saved it will be shown when you select *Previous Logins* located beneath the *Log In* button.
- You can then select the username and just add the password as a shortcut to login as that user. <u>A maximum of 2 previous logins can be saved. If logging in with a third user, it will clear the other logins.</u>
    - If either of those previous users have reports saved locally, the app will not be able to clear them until the user(s) logs in and clears the report(s) from PENDING LOCAL REPORTS. This login "failsafe" prevents reports from being accidentally deleted. If both users have locally saved reports you will not be able to login with a new user until one of the existing users submits/deletes the reports saved locally under their profile.

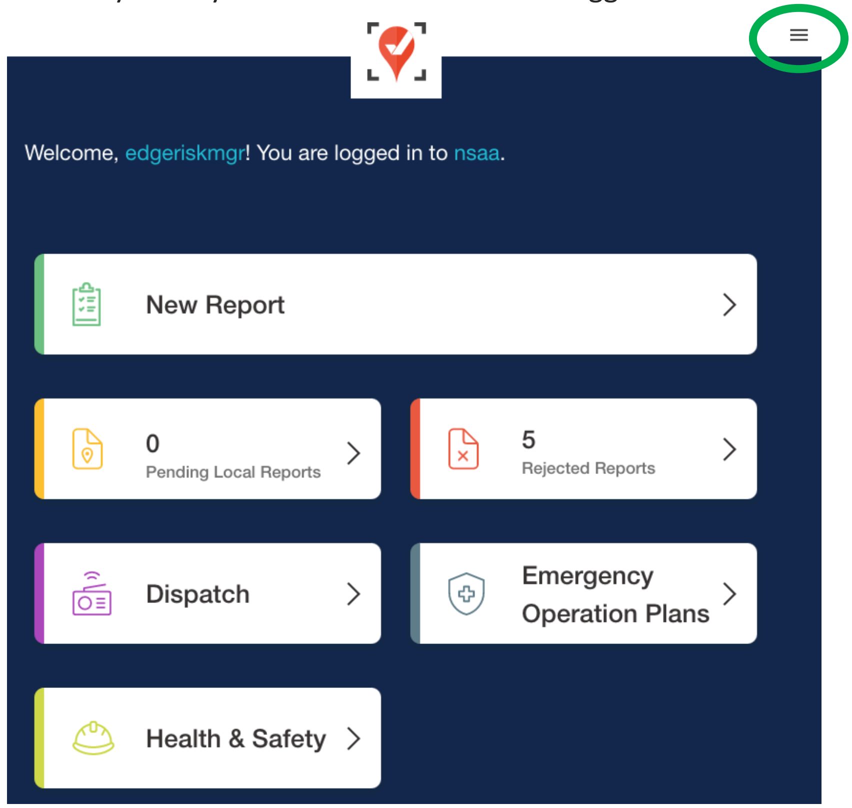


Getting Started

Upon successful login, you will be taken directly to the app home screen that shows each of the modules your user profile has access to. Access to specific modules are determined by the user permissions setup by your manager or those being used by your resort so you may not see all of these when logged in.

To access the settings for your account, select the menu icon located at the top right-hand corner of the main screen (circled in green on the image to the right). From settings you can:

- View your username and location.
- Log out of the app (be sure to do this every time you're finished using the app; this is a security feature to prevent unauthorized access to your account).
- Change your password – if your user profile allows for this (make sure you either memorize it or write it down and keep it in a safe place so you have it when needed).



Online / Offline Mode

The mobile app version of EDGEauditor that can be used on a phone or tablet allows you to use certain features even without an internet or cellular connection. <u>The only modules that can be used in OFFLINE mode are **Reports** (incident report and other reports), **Emergency Operation Plans** and **Health and Safety**.</u> However, functionality may be limited (e.g., location mapping will not be available on the incident report). You will know whether your device is connected by the ONLINE / OFFLINE icon that appears in the top right-hand corner of most screens on the app. If your connection status changes, the icon will change to reflect this. Depending on the screen size of your device, you may just see the connected/disconnected icon.

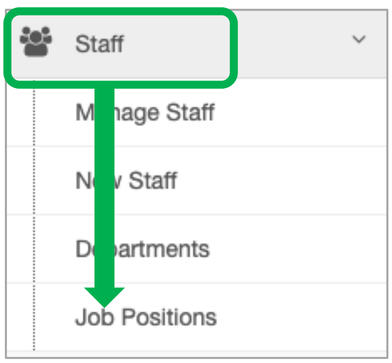
EDGEauditor

Health and Safety

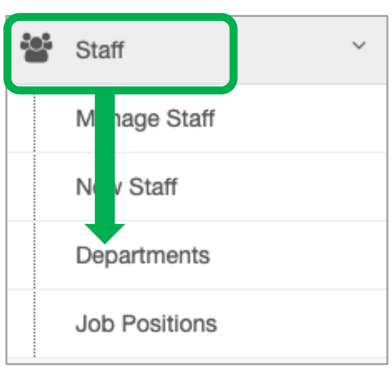
EDGEauditor's **Health and Safety** module allows organizations to track staff participation in trainings and safety meetings. Staff members will add their digital signature on the screen upon participating in any meetings or trainings. The **Health and Safety** module uses both the manager dashboard and app. First, we'll look at the manager dashboard as you'll need to setup your staff and training requirements.

Setting Up Staff to Participate in Trainings (Dashboard)

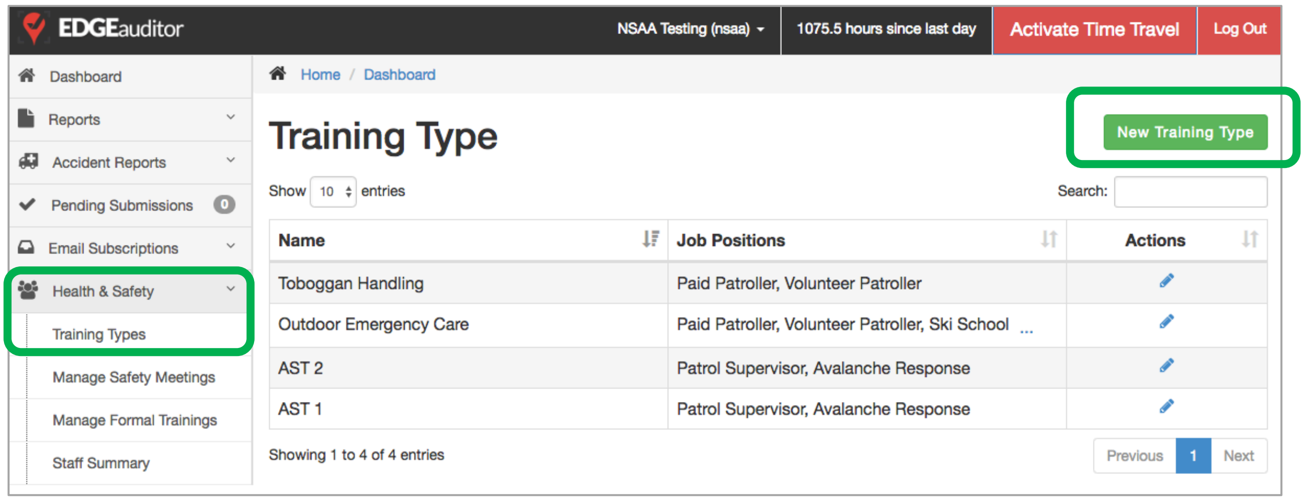
1. From a desktop computer, login to the manager dashboard at resort.edgeauditor.com.
2. From the side navigation click on *Staff > Job Positions*. Then click the green *New Job Position* button located in the top right-hand corner of the screen. This is the screen where you will create each of the job positions both staff and formal trainings can be attached to.



3. Next, you need to assign trainings at the department level. This is especially beneficial if you have a training type required of multiple departments. For example, a training type of First Aid Basics is required for departments Patrol, Ski School, Parks and Mountain Operations. From the side navigation click on *Staff > Departments*. Then click the green *New Department* button located in the top right-hand corner of the screen. This is where you will create each department a training and staff member can be assigned to.

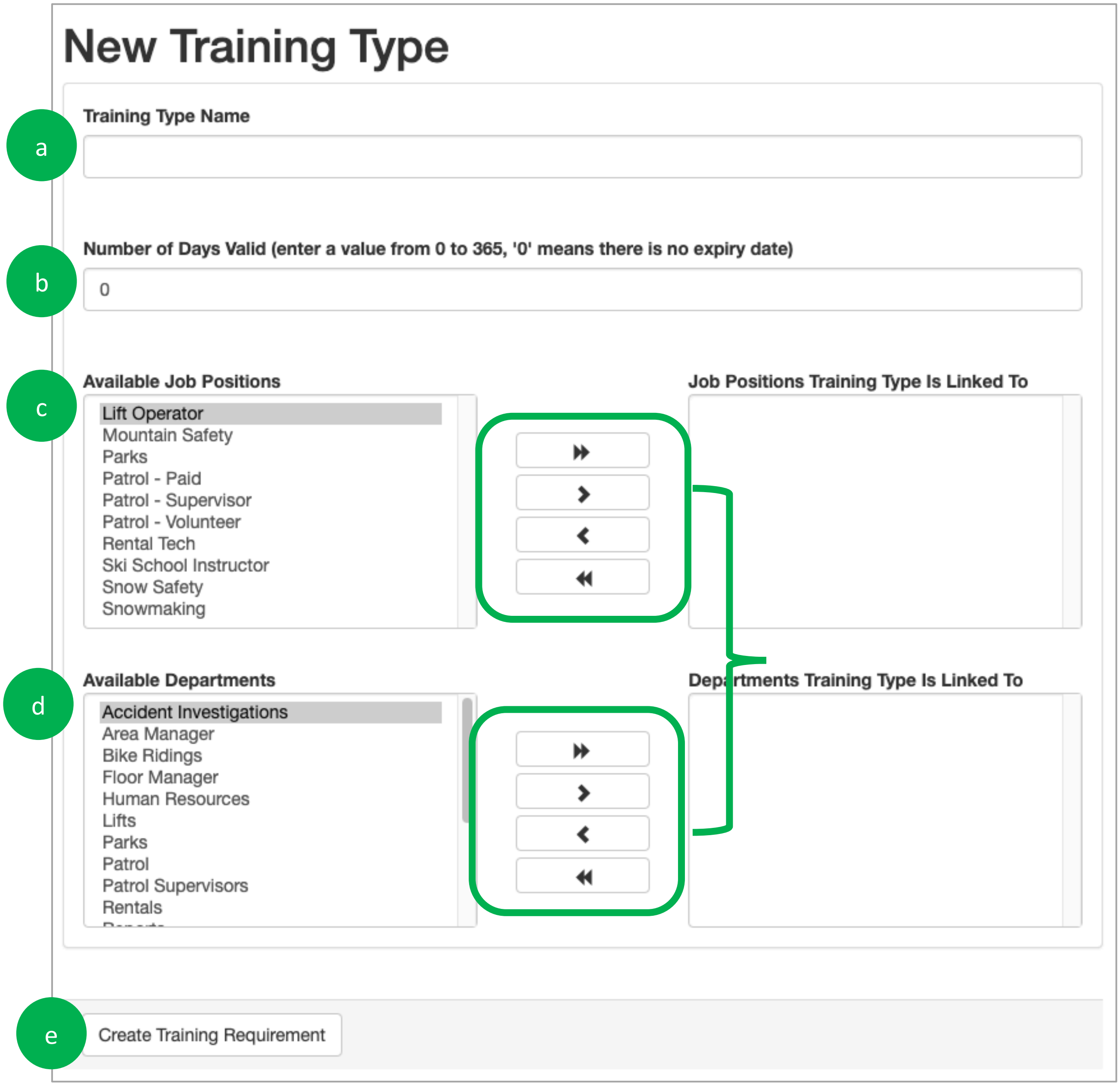


4. Once all your job positions and departments are created, navigate to *Health & Safety > Training Types*. Then click the green *New Training Type* button located in the top right-hand corner of the screen. This is where you will create the trainings required of each job position and department.



5. On the screen where you add your training type you will see the following options (please see screenshot on next page):
   a) *Training Type Name* > name for the training (e.g., First Aid Basics)
   b) *Number of Days Valid* > if you input value of "0" then the training will never expire.
   c) *Available Job Positions* > use the arrows provided to bring over/remove job positions that each training is attached to.
   d) *Available Departments* > use the arrows provided to bring over/remove departments that each training is attached to.
   e) Once you've completed the above, click the *Create Training Requirement* button.
   f) Repeat the above steps for each training type to be created.

The reason training types are attached to both job positions and departments is to allow for greater flexibility within the training module. There may be situations where not all staff within the same department are required to undergo the same training. For example, volunteer patrollers don't need to participate in AST 1 or AST 2 trainings as part of their job requirements, but they are still part of the patrol department as they share other training requirements with paid patrollers (e.g., standard first aid, outdoor emergency care, etc.). This will ensure staff tied to that department don't show an incorrect flag of "non-complaint" for training types not assigned to them.

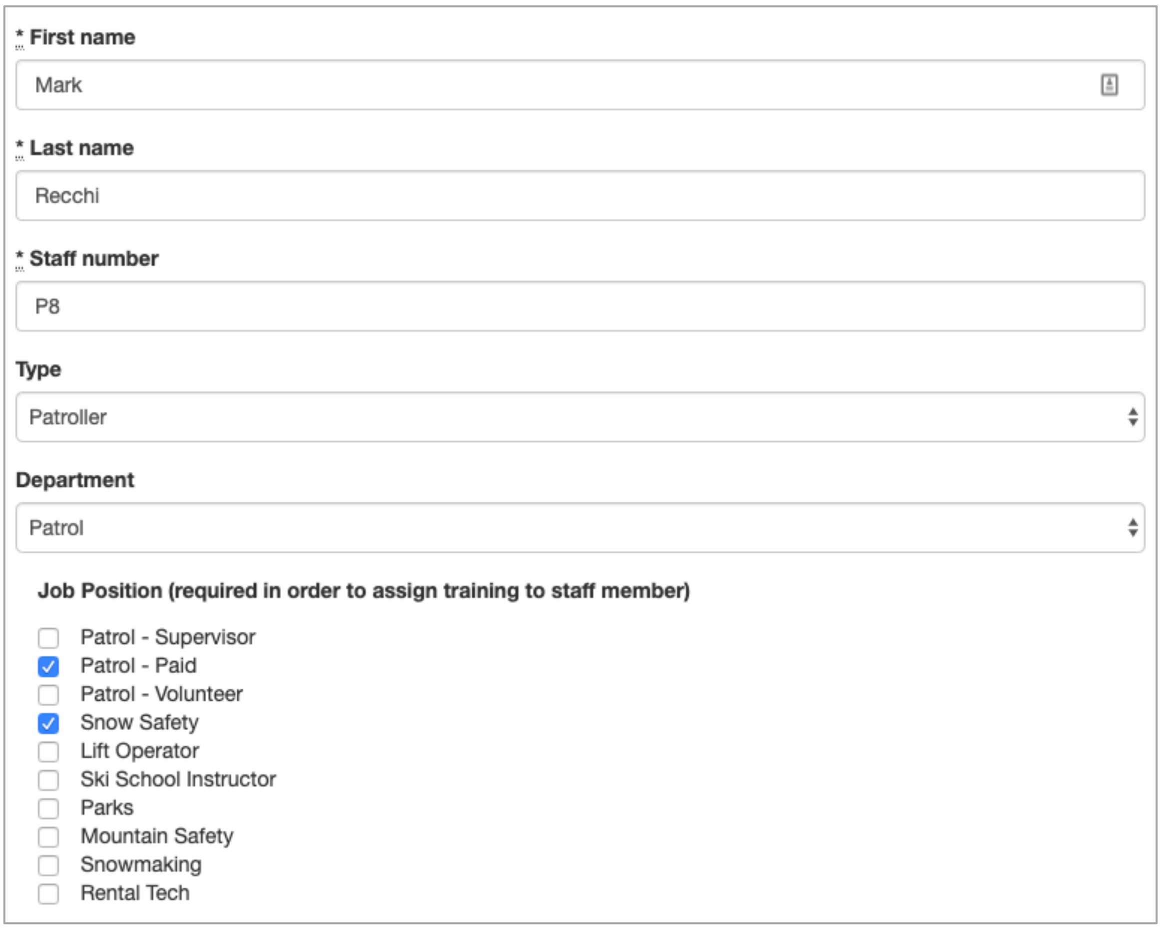


6. Once all the training types are created click on *Staff > Manage Staff* from the side navigation and click on the pencil icon to edit an existing staff member or click on the green *New Staff* button to setup a new staff member. This is where you will attach a staff member to one or more job positions and a department (see screenshot on next page).
    a) *First name*, *last name* and *staff number* are all mandatory fields.
    b) Type is an optional field and the list of options to choose from are static:
        - *Patrol* > Selecting this option will ensure the staff member appears on the dispatch console and incident report for selection.

  - *Rental Staff* > Selecting this option will ensure the tech is available on the app to rent/return equipment.
  - All other staff types chosen will allow the staff member to appear in a drop-down list for custom reports or added to a non-medical type dispatch event. If no staff type is chosen, the individual can still be assigned to any non-medical type dispatch event.

c) *Job position* is not mandatory. However, if a job position is not assigned then you will not be able to track the staff member's compliance for trainings.

d) Choosing the *department* a staff member belongs to is required for training purposes. Unlike job positions, <u>a staff member can only belong to one department</u>.



Now that staff are attached to job positions and departments that have training requirements you can monitor the staff member's compliance with those trainings. Next, you'll use the app to complete formal trainings for staff.

Completing Formal Trainings (App)

The screenshot on the next page illustrates steps #3 through #14.

1. Login to the EDGEauditor app with your user credentials and location code.

2. Select the **Health and Safety** module and then choose Formal Training.

3. Choose your department, which will then pre-populate the list of available training types.

4. Select the training type that applies.

5. Apply a filter if you want to filter the staff available for selection based on your chosen department and training type.

6. Add the name of your instructor.

7. Add the instructor's signature (this can be added later on before the training is submitted).

8. Add the date the training will occur on.

9. Add the time the training will occur.

10. Add the length of the training

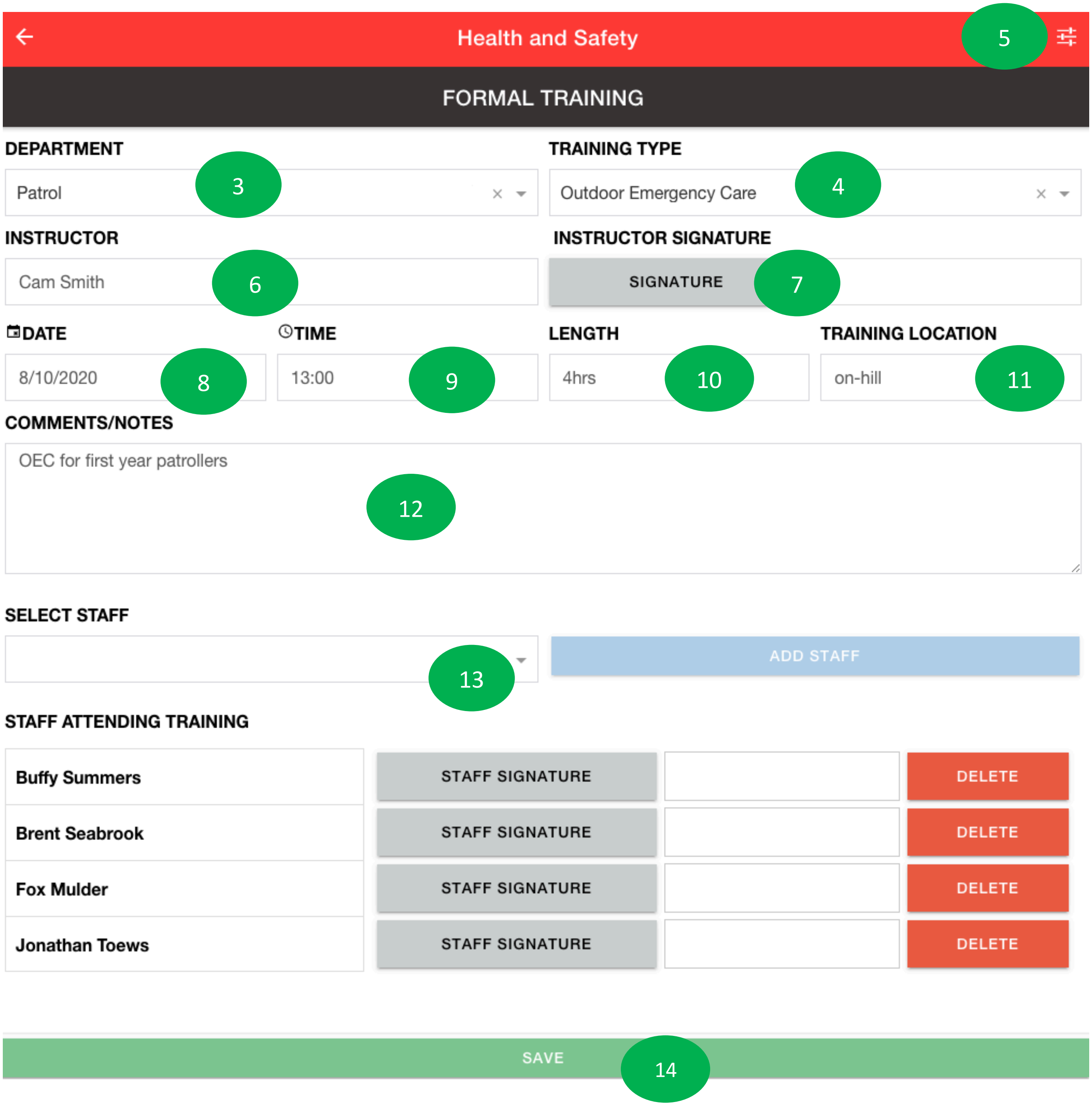
11. Add the training location.

12. Add comments or notes that explain the training, its purpose, etc.

13. To add staff to participate in the training, you can either start to type the staff member's name to filter results or use the drop down to scroll through the list and select the staff member. Then click the ADD STAFF button.
    - You can add all staff at once and then get staff members to add their signatures at a later time (e.g., once the training has finished and before you submit it).
    - This allows you to setup your formal trainings in advance of the actual training since it can be saved to the local device. <u>Remember, saving to the local device means the exact same tablet or computer must be used to access it</u>.

14. When you choose *SAVE*, you'll have the option to *Save Incomplete Formal Training to This Device* (where it can be accessed from **Pending Local Reports**) or *Save and Close Out Formal Training to Cloud* (this option removes the training from the app and sends it through to the manager dashboard).

- IMPORTANT: All fields except instructor signature and the staff members to be added must be filled in before you can save the training to the local device.
- Photos and other external documents can be attached via resort.edgeauditor.com once the training has been submitted.



Managing Submitted Formal Trainings (Dashboard)

1. From a desktop computer, login to the manager dashboard at resort.edgeauditor.com.
2. From the side navigation click on *Health & Safety > Manage Formal Trainings*. Find the formal training you wish to review and click on:
   - *Actions > View* to view the information that was submitted and attach any supporting documents such as certificates or course curriculum.
   - *Actions > Edit* to modify any of the information that was input on the app except date and staff members who attended the training.

Completing Safety Meetings (App)

If you already have your staff setup on the manager dashboard there are no further perquisites that have to be done before you can start completing safety meetings on the app. A staff member does not have to be assigned job positions or belong to a department in order to participate in a safety meeting.

1. Login to the EDGEauditor app with your user credentials and location code.

2. Select the **Health and Safety** module and then choose Safety Meeting.

3. Add the name of the meeting organizer.

4. Give your meeting a name.

5. Add the meeting date.

6. Add the meeting time.

7. Add the meeting length.

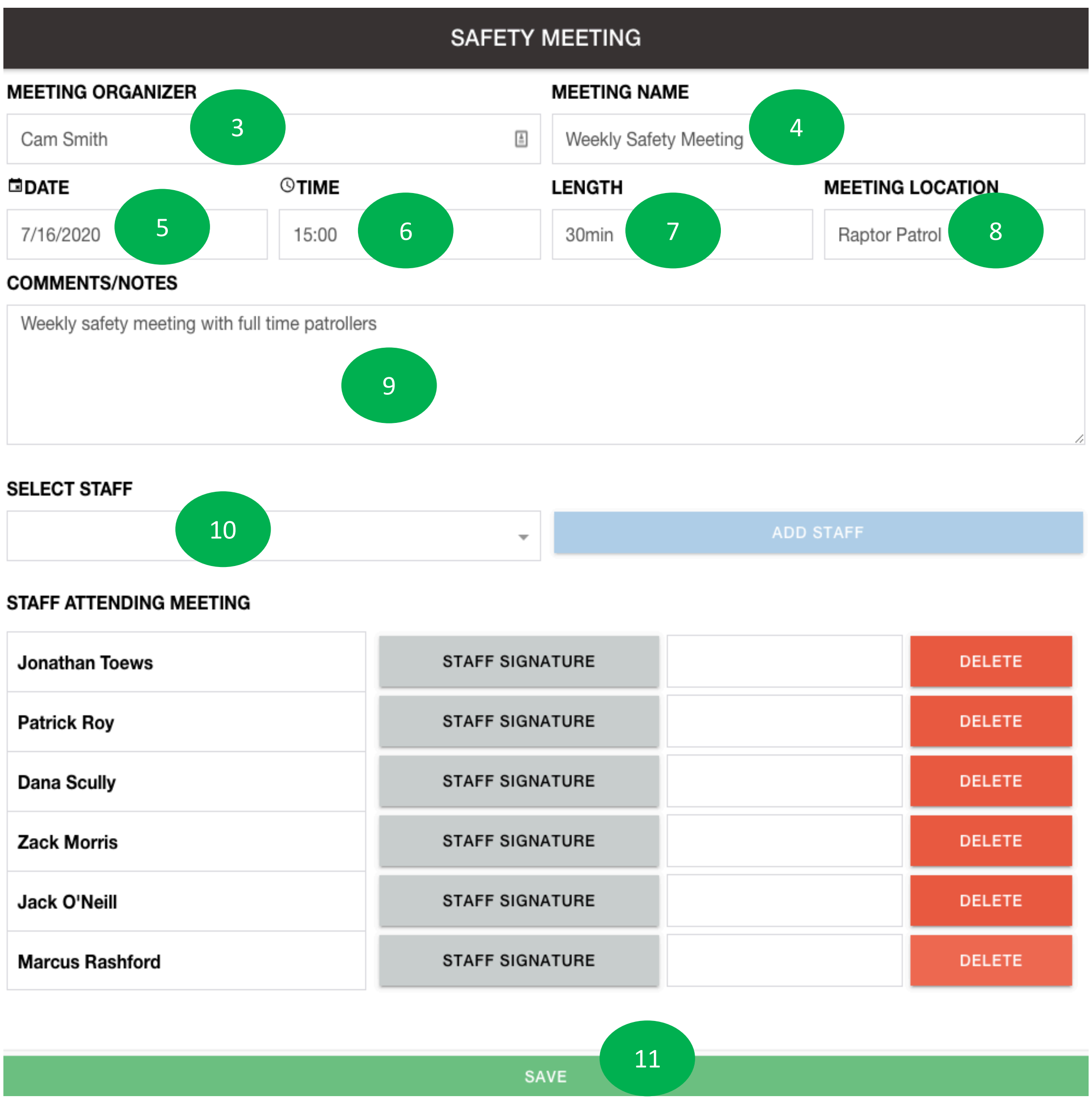
8. Add the meeting location.

9. Add comments or notes that explain the meeting (e.g., agenda).

10. To add staff to participate in the meeting, you can either start to type the staff member's name to filter results or use the drop down to scroll through the list and select the staff member. Then click the ADD STAFF button.
    - You can add all staff at once and then get staff members to add their signatures at a later time (e.g., once the meeting has finished).

- This allows you to setup your meetings in advance of the actual meeting since it can be saved to the local device. <u>Remember, saving to the local device means the exact same tablet or computer must be used to access it</u>.

11. When you choose *SAVE*, you'll have the option to *Save Incomplete Meeting to This Device* (where it can be accessed from **Pending Local Reports**) or *Save and Close Out Meeting to Cloud* (this option removes the meeting from the app and sends it through to the manager dashboard).
  - IMPORTANT: All fields except staff members to be added must be filled in before you can save the meeting to the local device.
  - For any images you add (e.g., photo of meeting agenda) you'll need to add a title for that photo. <u>Photos can only be added using the app version that can be installed on a mobile device.</u> Photos and other external documents can also be attached via the manager dashboard once the meeting has been submitted.



Managing Submitted Safety Meetings (Dashboard)

1. From a desktop computer, login to the manager dashboard at resort.edgeauditor.com.

2. From the side navigation click on *Health & Safety > Manage Safety Meetings*. Find the safety meeting you wish to review and click on:
   - *Actions > View* to view the information that was submitted and attach any supporting documents such as certificates or course curriculum.
   - *Actions > Edit* to modify any of the information that was input on the app except date and staff members attended the safety meeting.

Viewing Staff History (Dashboard)

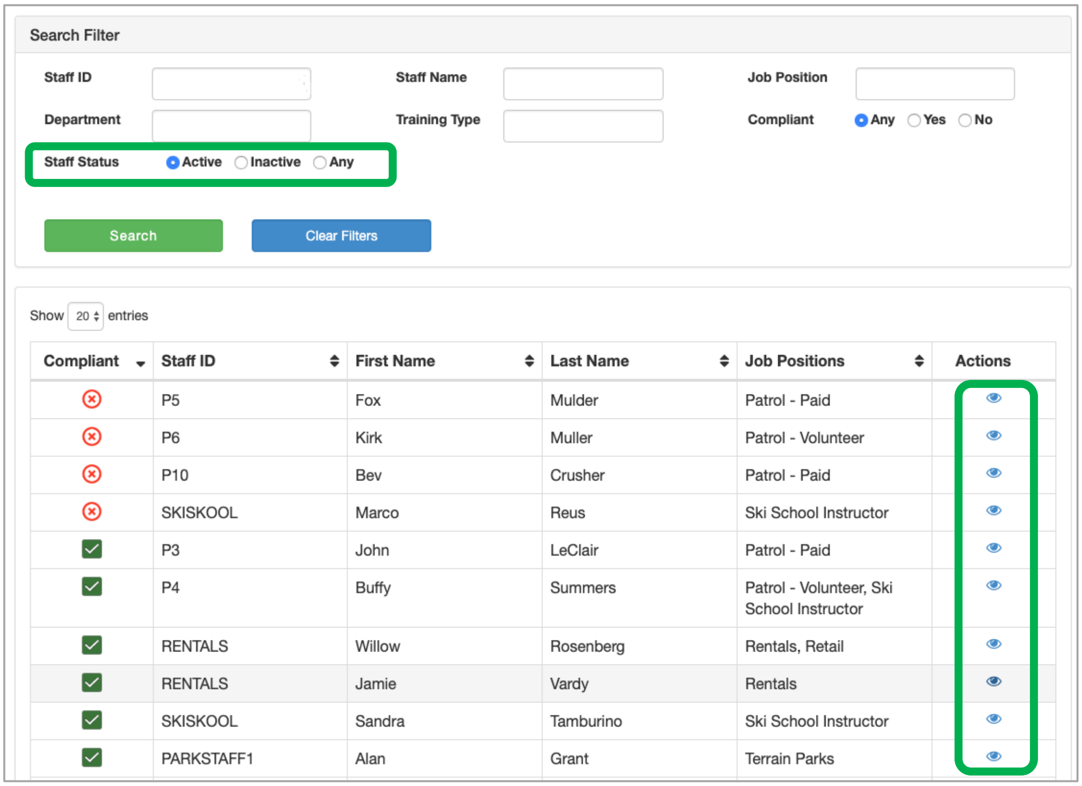
There is a master view on the manager dashboard that allows you to see whether a staff member is compliant/non-compliant with trainings assigned to their job position(s) as well as any safety meetings they participated in. By default, this master view shows only active staff members (so those currently setup under https://resort.edgeauditor.com/staffs). If you would like to view staff who have been deleted, just change the "Staff Status" option in the search filter to either *Inactive* or *Any*. This ensures there is still a record of participation in trainings and safety meetings even if the staff is no longer employed at your location.

1. From a desktop computer, login to the manager dashboard at resort.edgeauditor.com.

2. From the side navigation click on *Health & Safety > Staff Summary.*

3. Use the search functionality to filter the staff table or the column headers to sort the data. For the "Compliant" column the red 'X' indicates that a staff member is non-compliant (either because they are missing a training assigned to their job position or a training they've participated in previously has expired). A green checkmark indicates the staff member is fully compliant and has completed all trainings assigned to their job position(s).
   - IMPORTANT NOTE: Compliant/non-compliant only applies to formal trainings. For safety meetings, it is only participation that is recorded.

4. To view more details as well as the full history for that staff member, click on the “eye” icon from the *Actions* column.



5. The first table on the staff summary screen shows all trainings assigned to that staff member based on their job position(s) and whether or not they are compliant. The “Staff History” table shows the complete record of participation in all trainings and safety meetings.
   - Screenshot on the next page illustrates the above.
   - Clicking the *Generate PDF* button in the top right-hand corner will generate a PDF copy of the staff member’s training history, compliance and participating in safety meetings.

Training Compliance

Generate PDF

Staff ID: P1

Staff Name: Jonathan Towes

Job Positions: Paid Patroller, Avalanche Response

Show 10 entries Search:

Compliant	Training	Job Position
✓	Outdoor Emergency Care	Paid Patroller
✗	AST 1	Avalanche Response
✗	AST 2	Avalanche Response
✗	Toboggan Handling	Paid Patroller

Showing 1 to 4 of 4 entries Previous 1 Next

Staff History

Show 10 entries Search:

Name	Type	Date Attended	Valid Until	Signature
WHMIS Fall Meeting	Safety Meeting	2018-11-19		
WHMIS	Safety Meeting	2018-09-19		
Weekly Safety Check In	Safety Meeting	2018-10-04		
Toboggan Handling	Formal Training	2018-09-19	2018-09-20	
Outdoor Emergency Care	Formal Training	2018-09-19	Does not expire	
AST 2	Formal Training	2018-09-19	2018-09-21	
AST 1	Formal Training	2018-09-19	2018-09-20	

Staff Summary (App)

For users who do not have access to the manager dashboard or a desktop computer, the Staff Summary section will allow you to quickly identify a staff member's compliance with a specific training type so you can see if a training needs to be scheduled for them.

1. Login to the EDGEauditor app with your user credentials and location code.

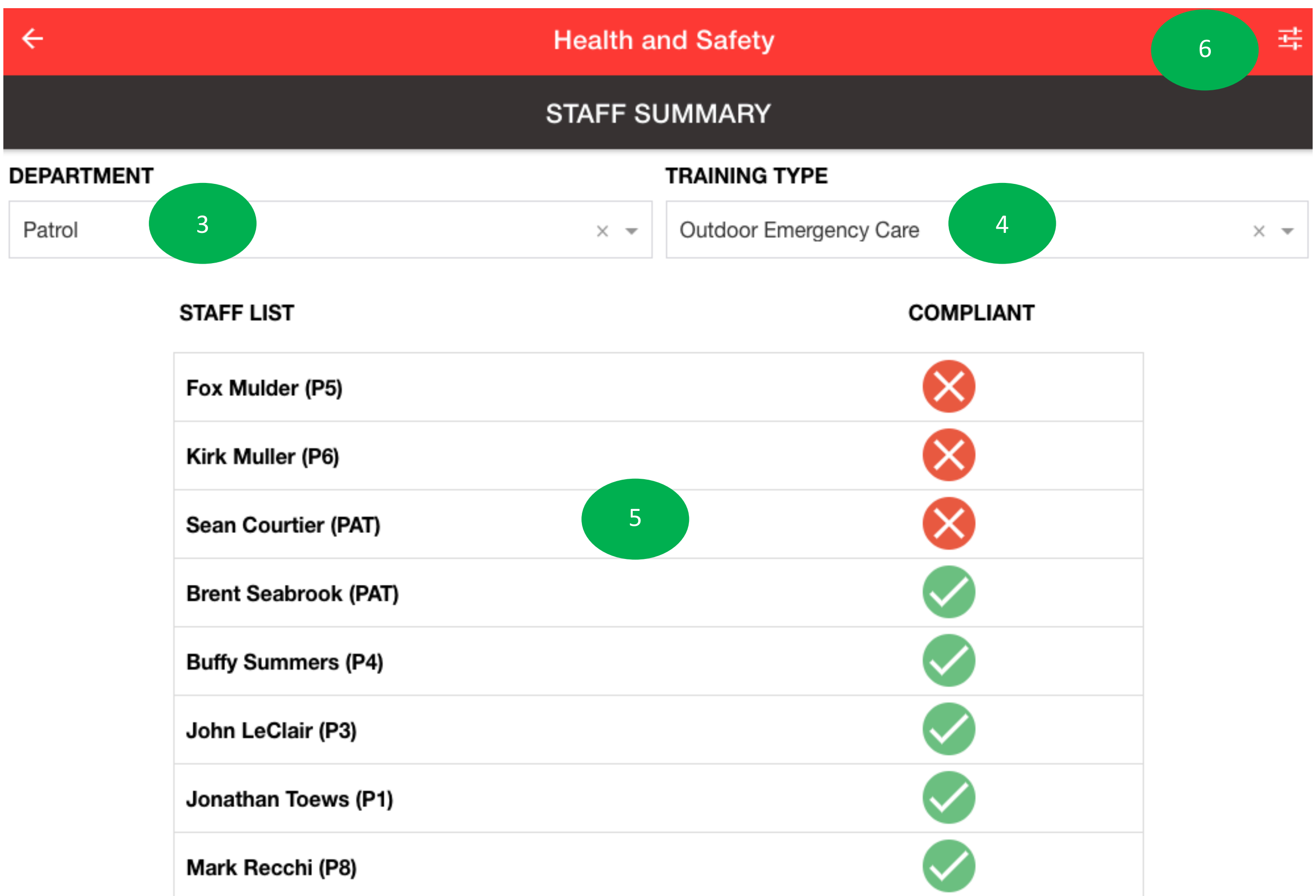
2. Select the **Health and Safety** module from the main screen and then choose Staff Summary.

3. Choose your department, which will then pre-populate the list of available training types.

4. Select the training type that applies.

5. The results will display a list of all staff who are required to have that training within the department chosen. By default, the list will be sorted by the staff members who are not compliant (as indicated by the red circle with an "X" in the middle).

6. You can use the filter option (located in the top righthand corner of the screen) to change the results that appear.



Technical Escalation Process

Escalations may be required when team members encounter technical issues within the application. Before contacting EDGEauditor support, please ensure you:

1. Determine if the issue is isolated to a single or handful of devices or affecting all tablets.
2. Armed with the above information, contact your IT resource so they can do some internal troubleshooting first in the event it is internet related.

If your internal IT department cannot resolve the issue, please follow these steps for incident reporting to EDGEauditor:

- Go to https://edgeauditor.zendesk.com/hc/en-us/requests/new and complete the required information in order to submit your ticket. The more information you are able to provide the easier it will be for the support team to troubleshoot. Otherwise, you can open a ticket by sending an email to support@edgeauditor.com.
- For severity Level 1 Service Incidents (defined below), please call 1-866-485-3571.

Business Hours Support

- For severity Level 1 Service Incidents, support is available 24 hours a day, seven days a week.
- All other service incidents will be handled during EDGEauditor business hours:
  - 9:00am to 5:00pm ET Monday to Friday (except statutory holidays observed in the province of Ontario, Canada)

After Business Hours Support

EDGEauditor provides after hours technical support should resorts encounter Level 1 Service Incidents, which are defined as:

- Application is not accessible on all devices.
- Application is accessible but major functions (e.g., saving) are unusable to the extent that the normal business use of the application is significantly impeded.

For support after hours and during statutory holidays, please call 1-866-485-3571
or send an email to support@edgeauditor.com