STAC

User Guide

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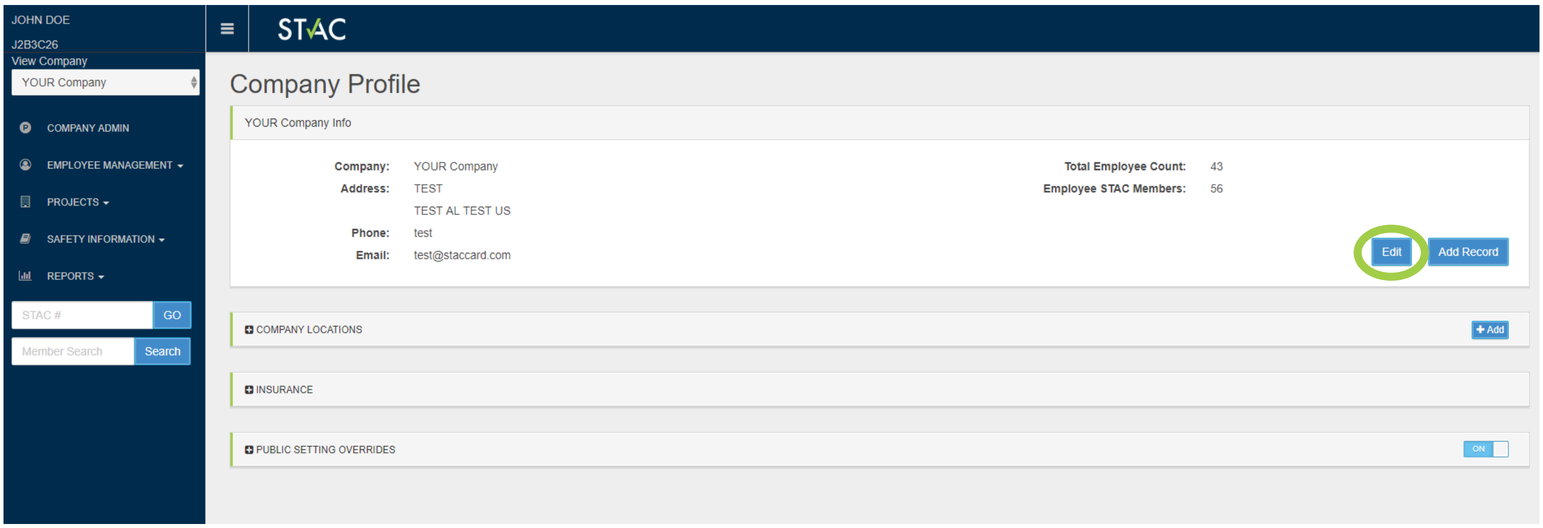
Table of Contents

Company Admin

YouTube Tutorial: https://youtu.be/tZdf8UhrIzQ

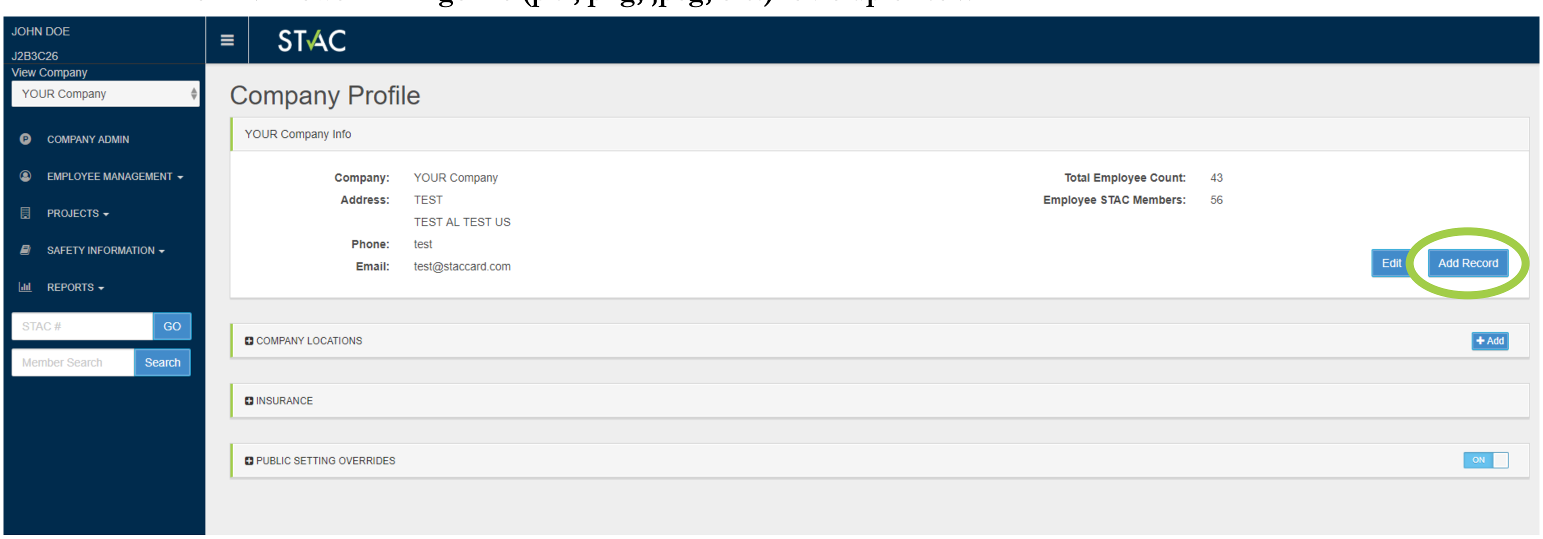
Company Profile:

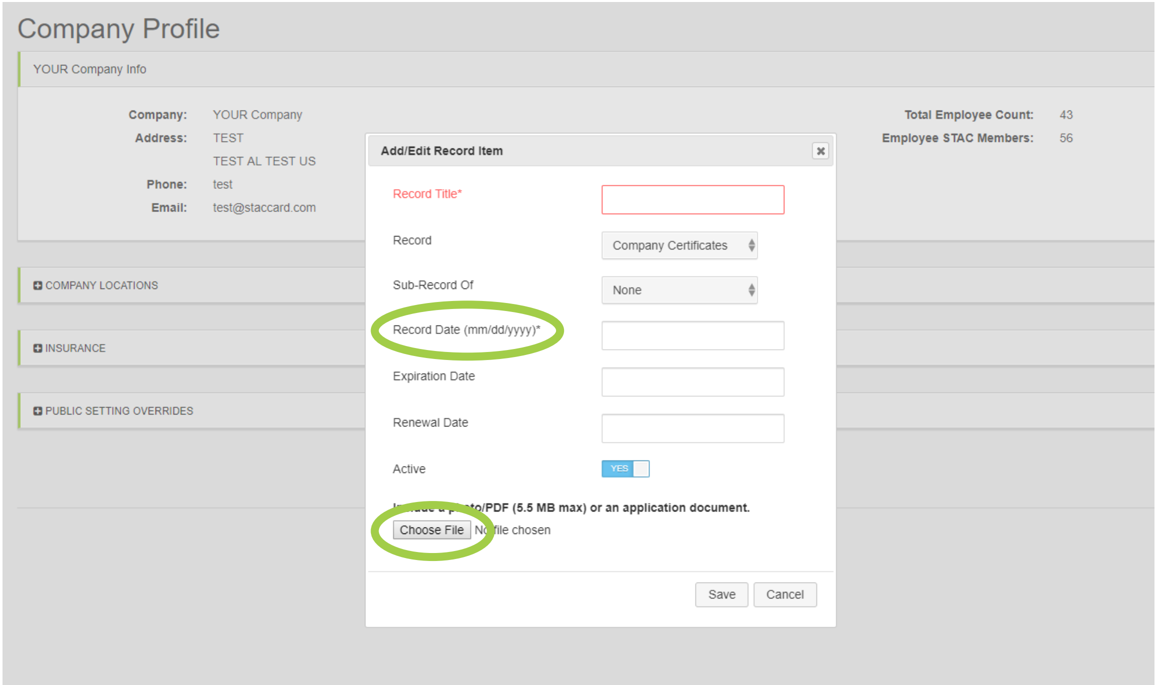
The company profile page allows you to provide basic information regarding your company, add company records, add company locations, and edit overrides for what is shown on employee profiles. Basic company information like address, phone number, or email can be changed by clicking the "Edit" button.



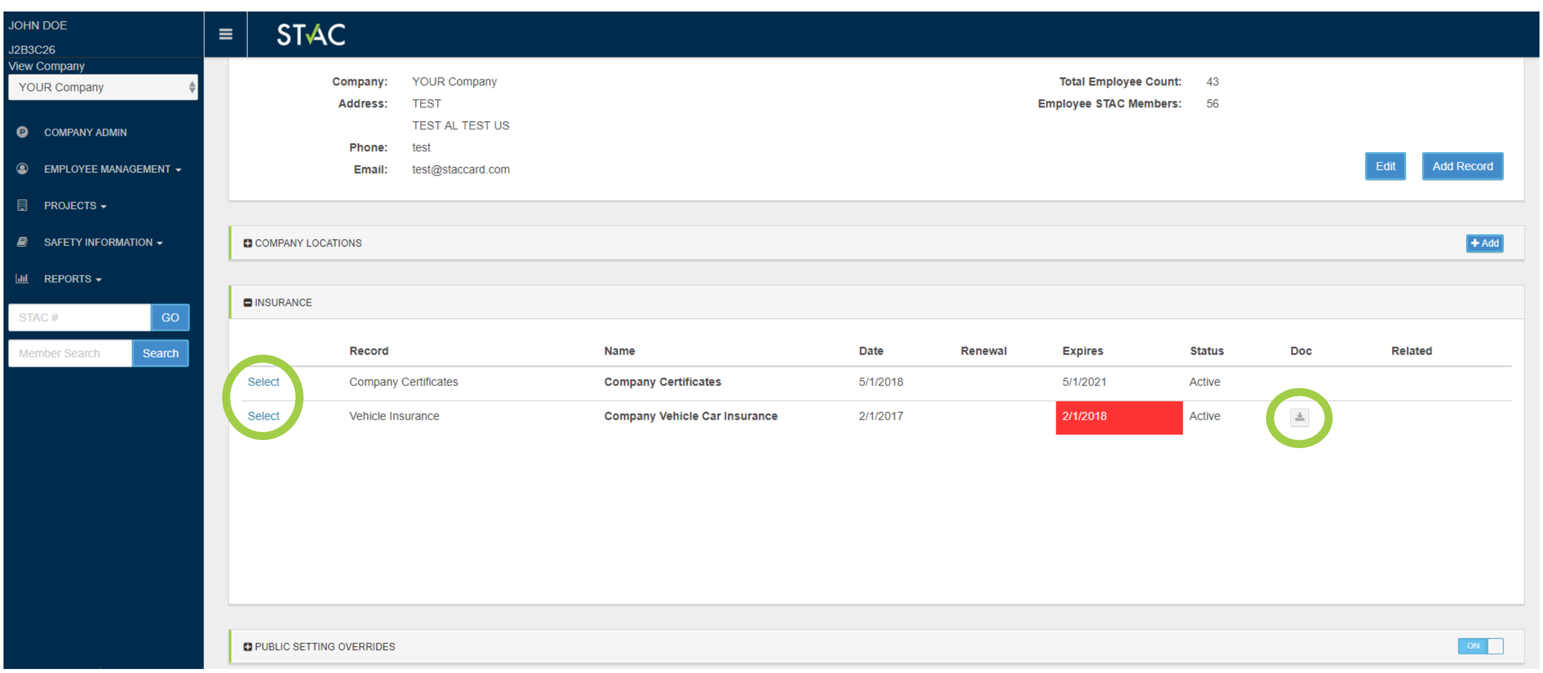
Add Record:

Employee records can be added by clicking the "Add Record" button. Company records can range from certificates to safety/training documents or vehicle insurance. If there is a type of company document you would like to add that is not listed, please let us know. Each record requires a Record Date and allows an image file (pdf, png, jpeg, etc.) to be uploaded.



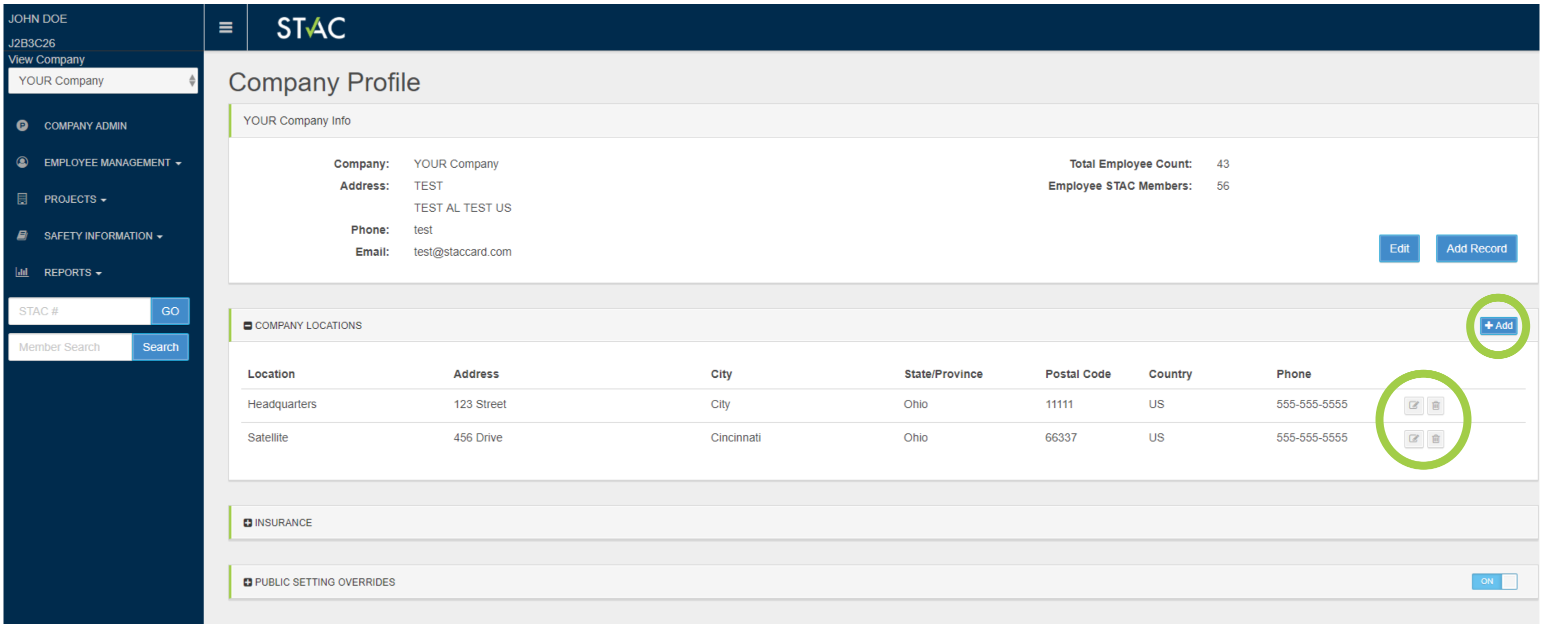


Once saved, company records are stored by alphabetical order. Documents can be viewed by clicking the download button. Records can be edited by clicking "Select" to bring up the record information.



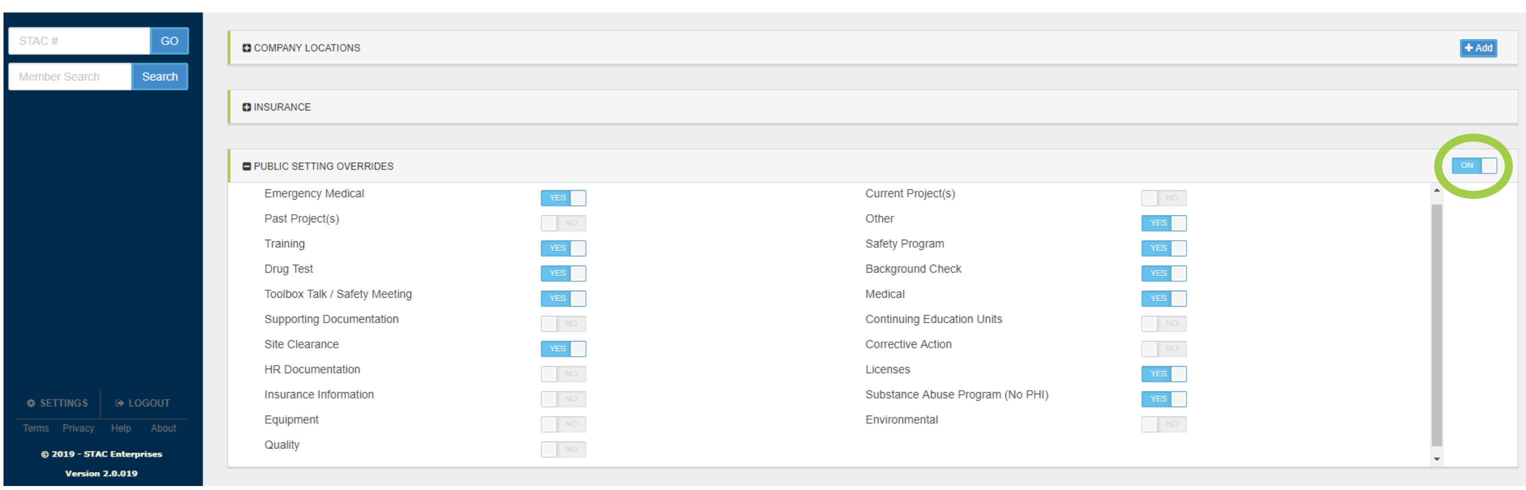
Company Locations:

Company Locations allows you to provide information for more than one office. This allows companies to assign employees to their proper location based on where they work. Company locations can be added by clicking the "+Add" button found in the Company Locations dropdown. Locations can be edited/deleted by the icons located to the right-hand side.



Public Setting Overrides:

Public Setting Overrides allows you to edit what type of information is available to be viewed publicly for all employees if a card/sticker is scanned. If an employer uses STAC to store drug tests or background checks but does not want this information available to the public, the public setting overrides can keep this information confidential. Turn public setting overrides on by clicking the button to the right-hand side until it highlights blue "ON". Select each button individually to show what information you want to be publicly viewable.



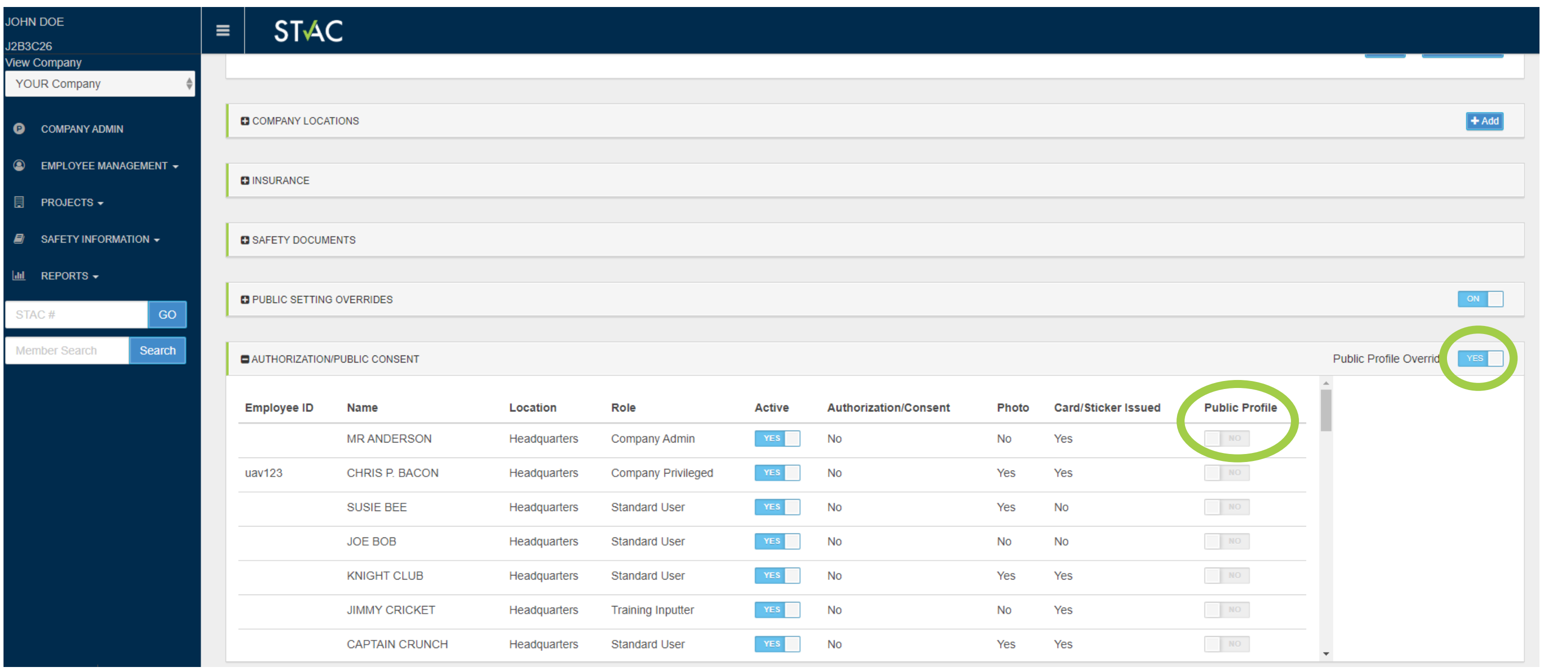
Authorization/Public Consent

The purpose of the Authorization/Public Consent Tab is to activate and deactivate employee public profiles.

- **To activate an individual employee public profile, click the button under the Public Profile column to "YES". To activate all active employee public profiles at once, click the Public Profile Override in the right-hand corner.**

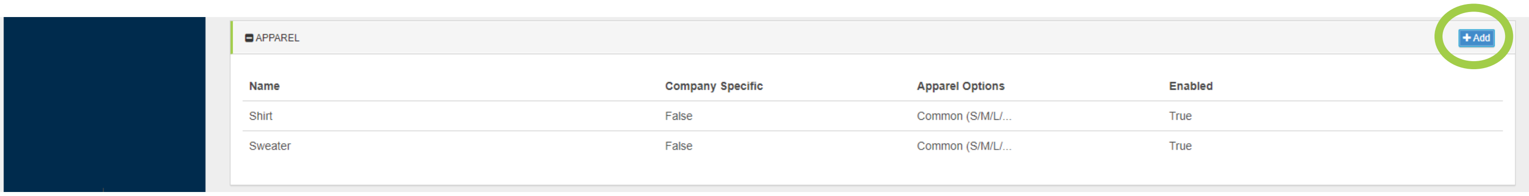
The Authorization/Public Consent Tab allows you to view and track the following:

- **Employee roles**
- **Authorization consent forms on file**
- **Issuance of employee ID card and/or stickers**



Apparel

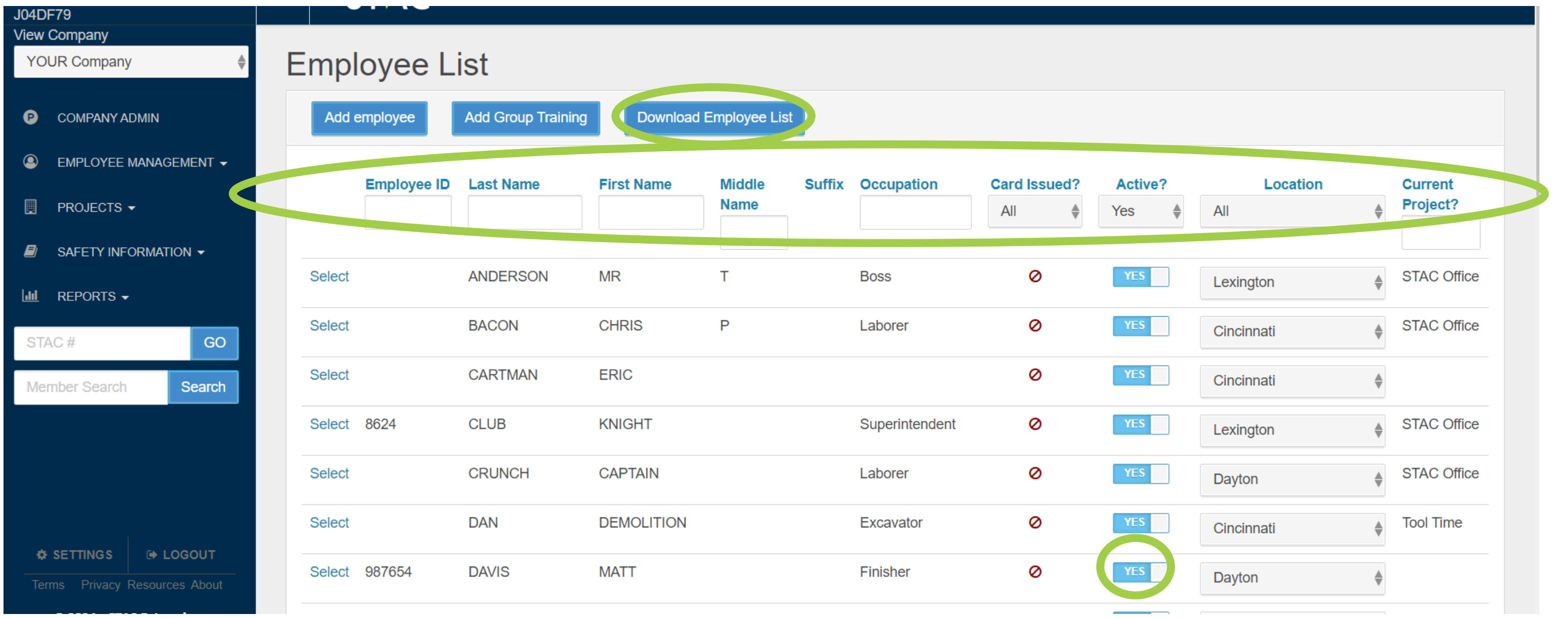
The Apparel section allows you to add custom apparel options so you can track employee sizes and information. To add a new apparel item, click the '+Add' button and fill out the information. Once created, these apparel options are located on employee profiles under the Other Information section.



Employee Management

Employee List:

The Employee List contains all employees currently uploaded into the STAC database. The list can be filtered using the highlighted ID, Name, Suffix, Occupation, Card Issued, Active, Location, and Current Project column headers. Search bars are available for ID, Names, Occupation, and Project headers. Employees can be activated/deactivated from this list by using the Active button.

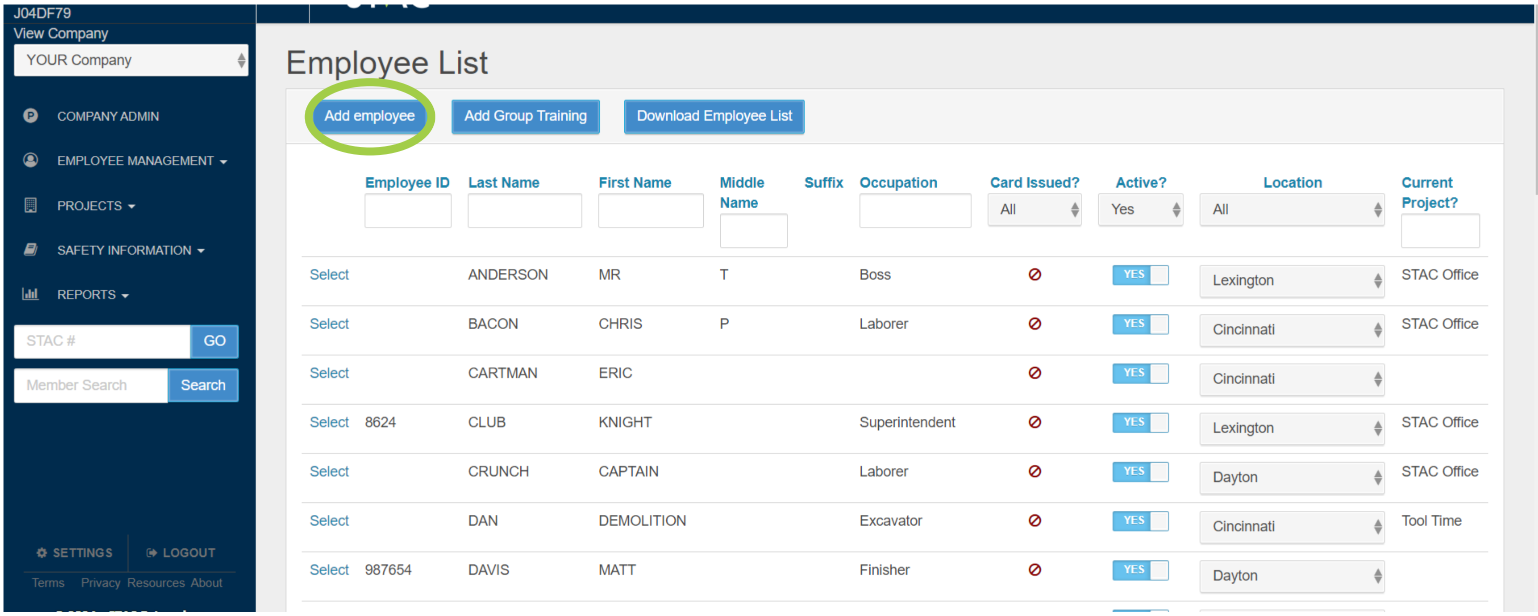


Download Employee List:

The download Employee List button allows you to download an excel file of your Employee List with the current filters applied. To use this feature, filter your list to the employees you would like shown and click the 'Download Employee List' button. Your list will now be available in your downloads folder.

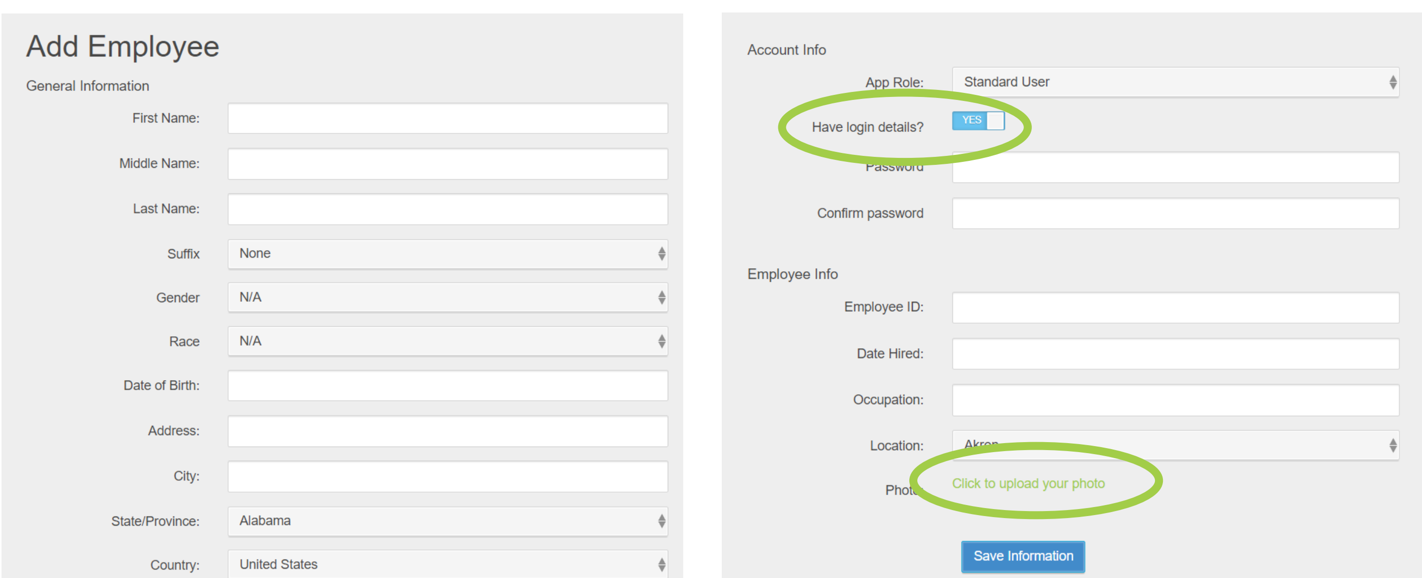
Add Employee:

Employees can be manually added to the employee list by clicking the “Add Employee” button.



When manually adding employees, the following information is required:

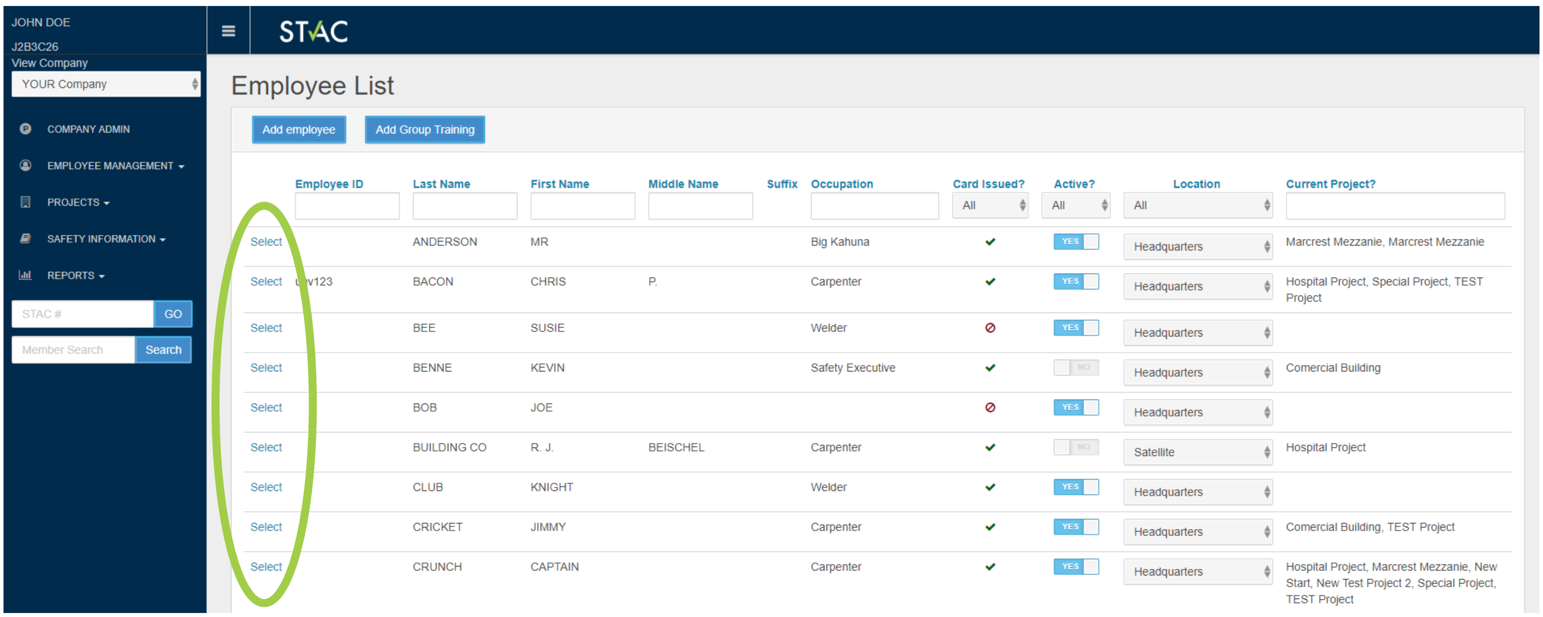
- First/Last Name
- Gender
- Race
- Date of Birth
- City
- State
- Country
- Postal Code
- Location



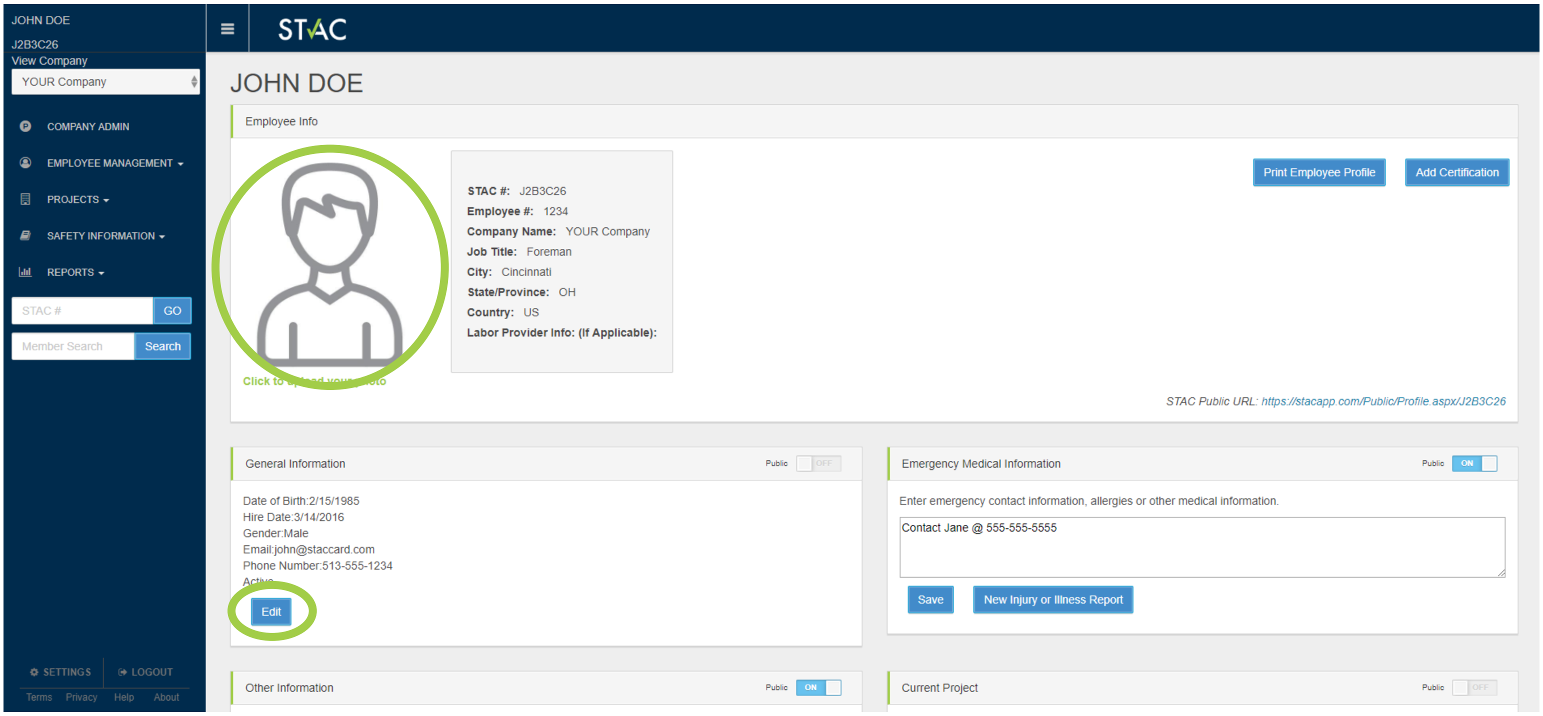
To give your employee login credentials, fill out the Account Info section. If you do not want this employee to have credentials, change the box from 'Yes' to 'No' next to 'Have login details?'. If you would like to upload an employee's profile picture, this can be done by clicking the 'Click to upload your photo' at the bottom of the screen. Once the information is filled out select "Save Information" to add this employee to the employee list.

Employee Profile:

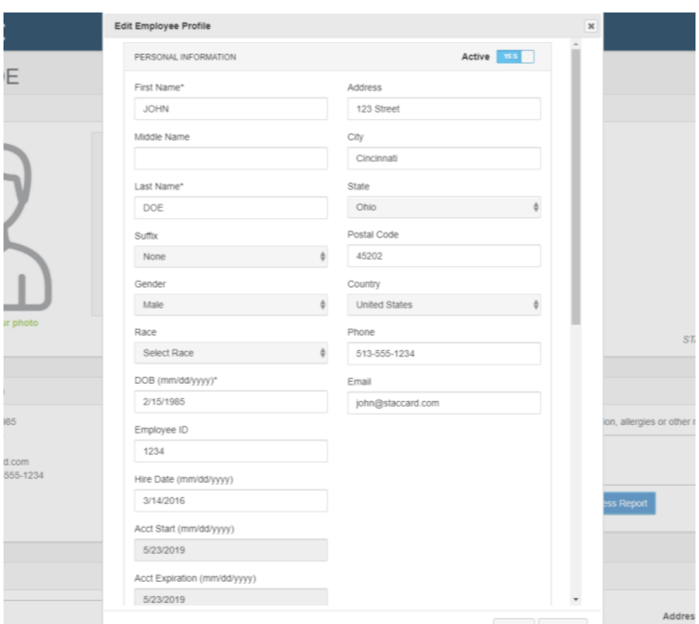
To view an employee's profile, click the "Select" button location next to the employee's name. This will allow you to view and edit the information that is associated with this employee.

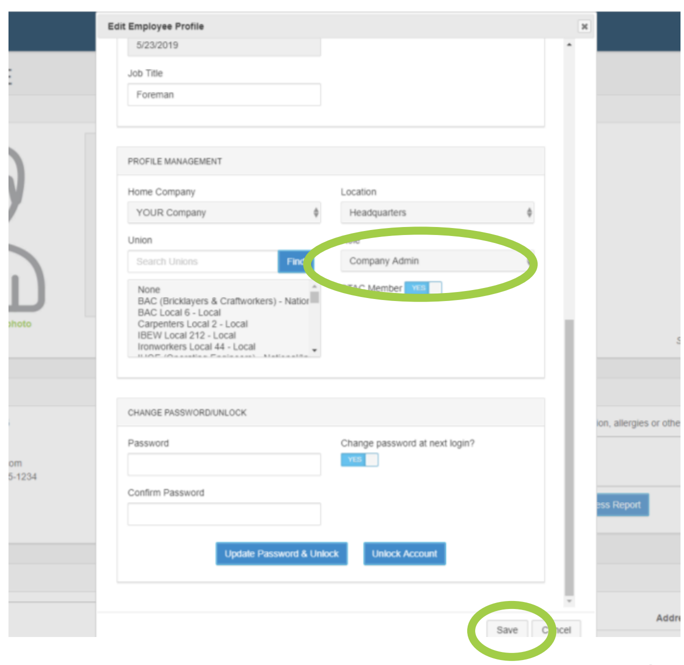


Basic information is shown along the top of the profile including a STAC #. This is a unique number given to each employee within STAC to provide a unique identifier when adding/editing this profile in the future. An employee photo can be uploaded by clicking on the blank photo. The Employee Info is separated into multiple categories:

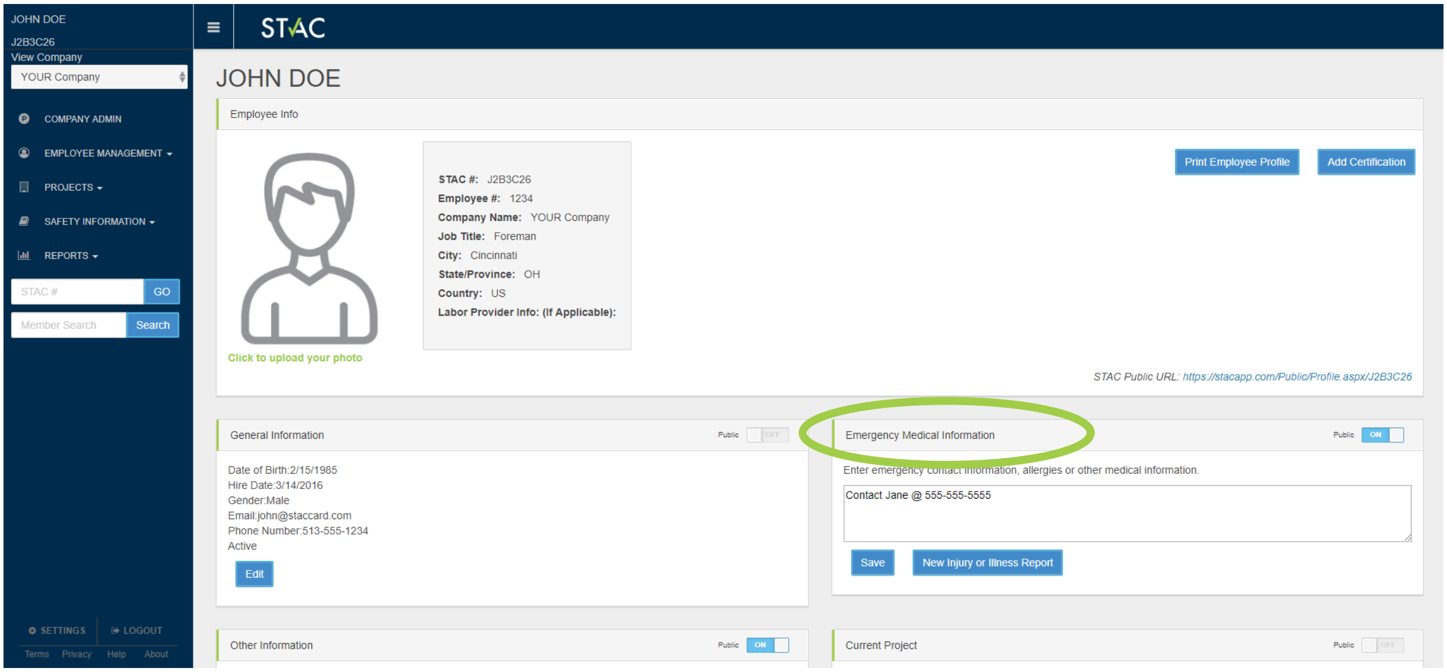


General Information – Contains the employee's personal information (information filled out when creating employee), profile management (ability to assign union relationships and company roles), and ability to change a login password or unlock their account. This information can be edited by clicking the "Edit" button within the General Information section. To complete an employee's login information, change their role to allow for more permissions.

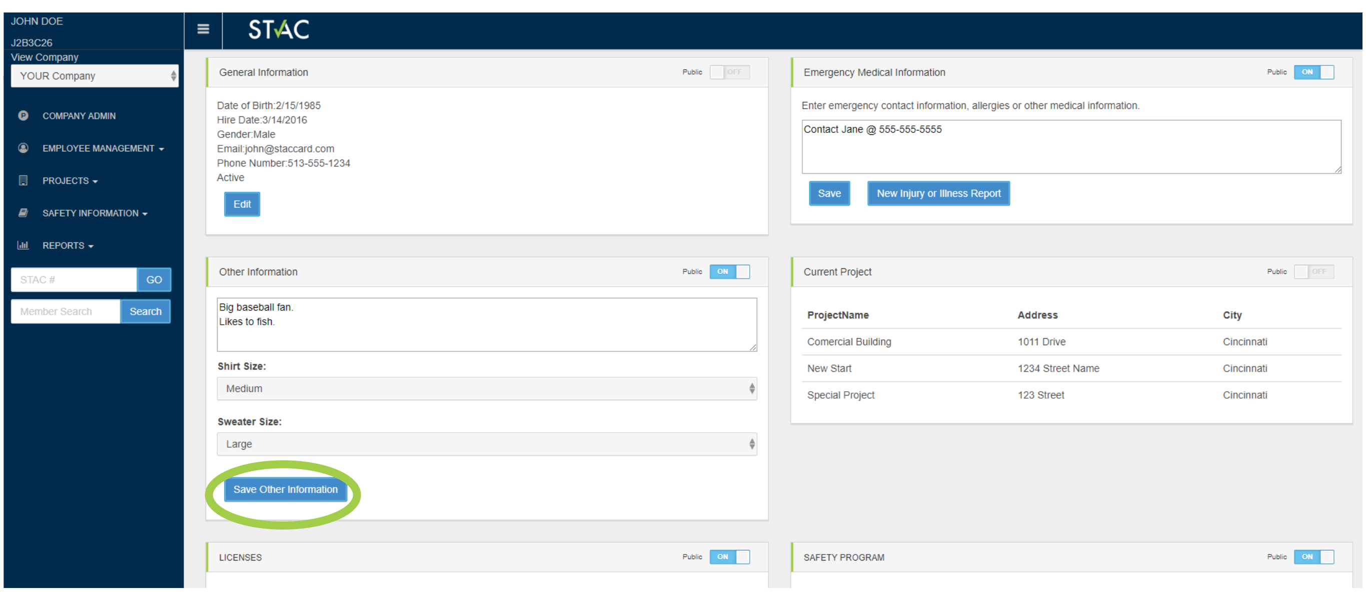




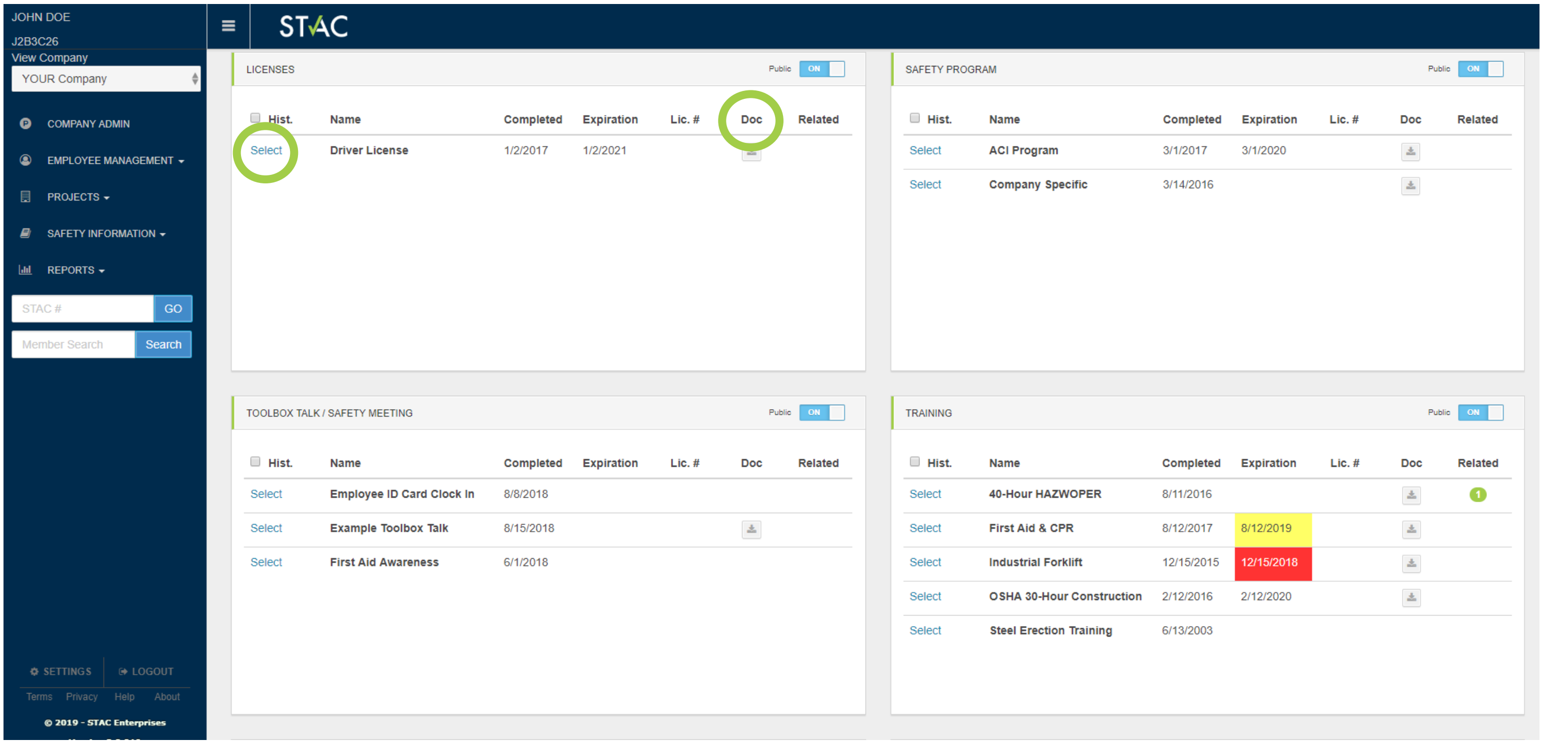
Emergency Medical Information – Contains a text box that allows medical information to be inputted on the employee's behalf. This can be used to input emergency contact information, known allergies, or report illnesses or injuries. To edit this information, type in the text box and click "Save". To report an injury or illness, click the "New Injury or Illness Report" button (see Safety Information for more).



Other Information – Contains a text box to add any information for this employee that is not part of their general information. Shirt Size and Sweater Size are also available to select. To edit this information, type in the text box or select from the drop-down lists and click "Save Other Information".



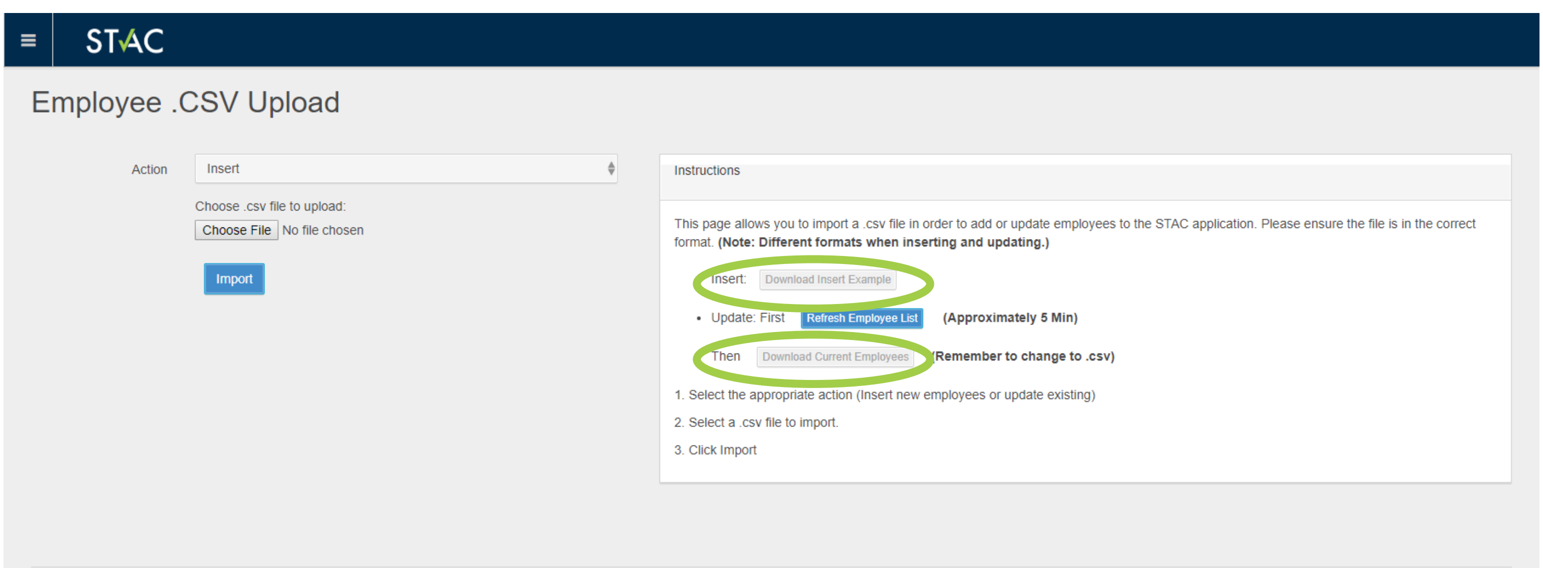
Additional Information Boxes – Contains the projects, safety trainings, and certifications of the employee you are viewing. Documents can be viewed by clicking the Download icon. Information can be edited by clicking the "Select" button (see Add Training for more information).



Employee .CSV Upload:

YouTube Tutorial: https://youtu.be/-z6TFAhOtnI

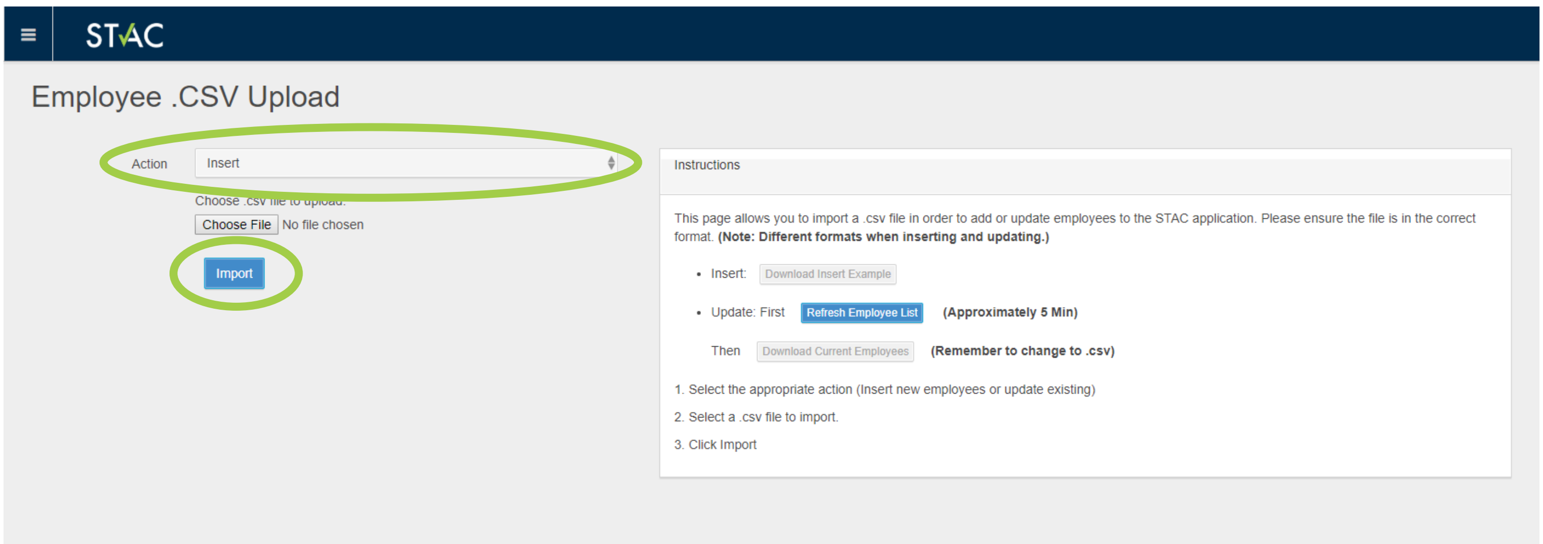
The Employee .CSV Upload is a way to import or update multiple employees at one time. To use the upload function, you will need to use the compatible CSV files located via download to the right of the screen.



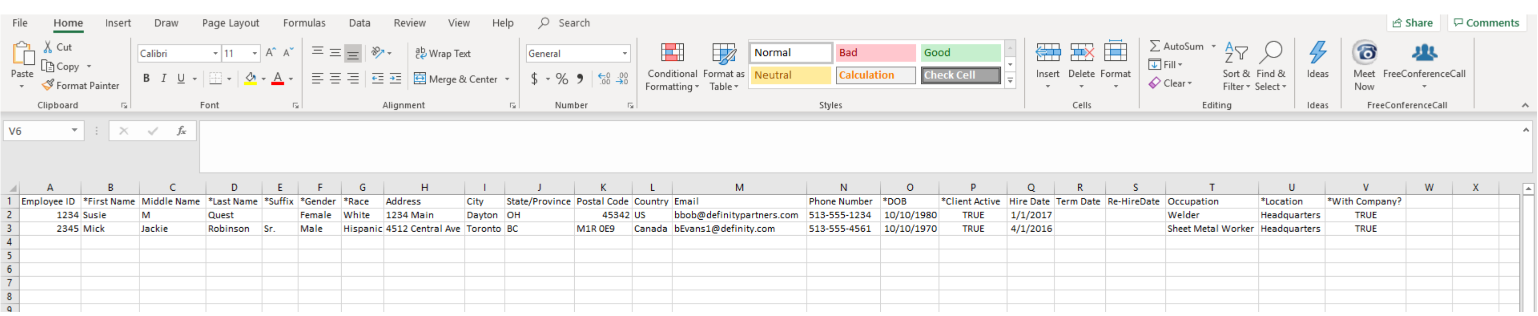
Insert:

To import new employees not currently on your Employee List, select the insert csv file by clicking the "Download Insert Example" file. Once downloaded, you will need to fill out the column information for each employee. The column headers with an "*" are information that is required for the upload to be completed. Options for Column Dropdowns are as follows:

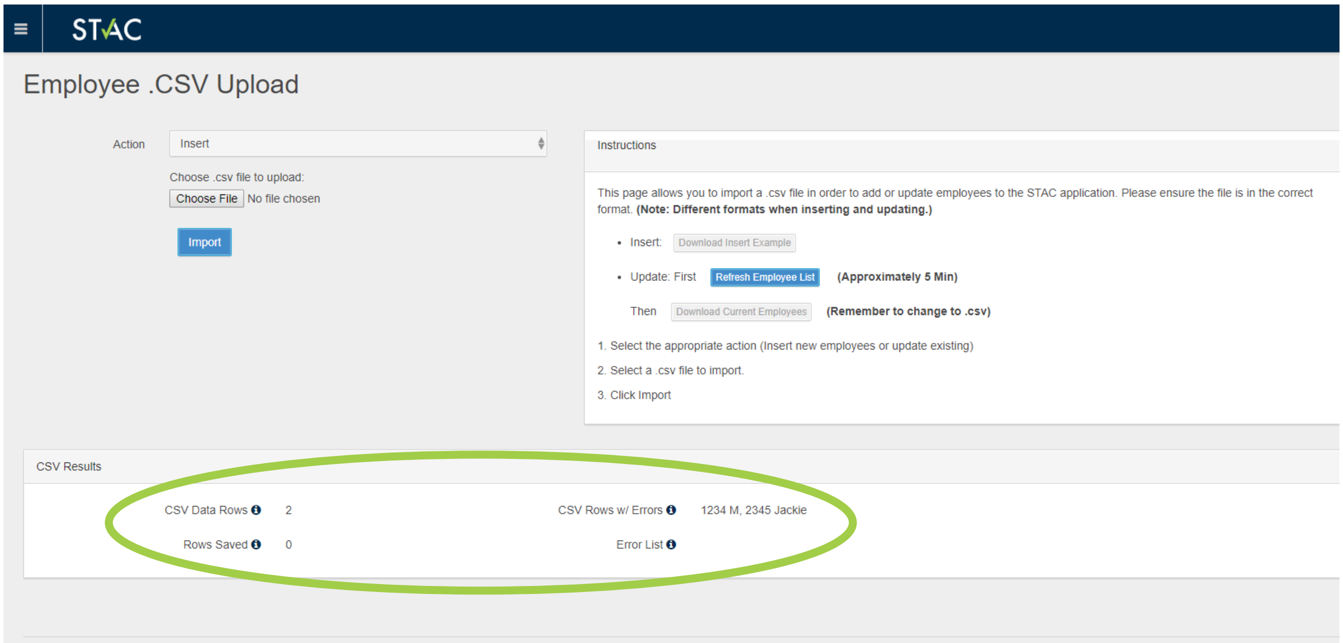
- **Gender: Male, Female, N/A**
- **Race: American Indian or Alaskan Native, Asian, Black or African American, Hispanic or Latino, Multiracial, N/A, Native Hawaiian or Other Pacific Islander, White**
- **State: United States and Canadian Provinces (Use two letter abbreviation for upload)**
- **Country: US or Canada**
- **Client Active: TRUE, FALSE**
- **Location: Must match a company location**
- **With Company: TRUE, FALSE**



Once the file is filled out, save the file as a CSV. Under the action dropdown select Insert, choose your csv file and click Import.

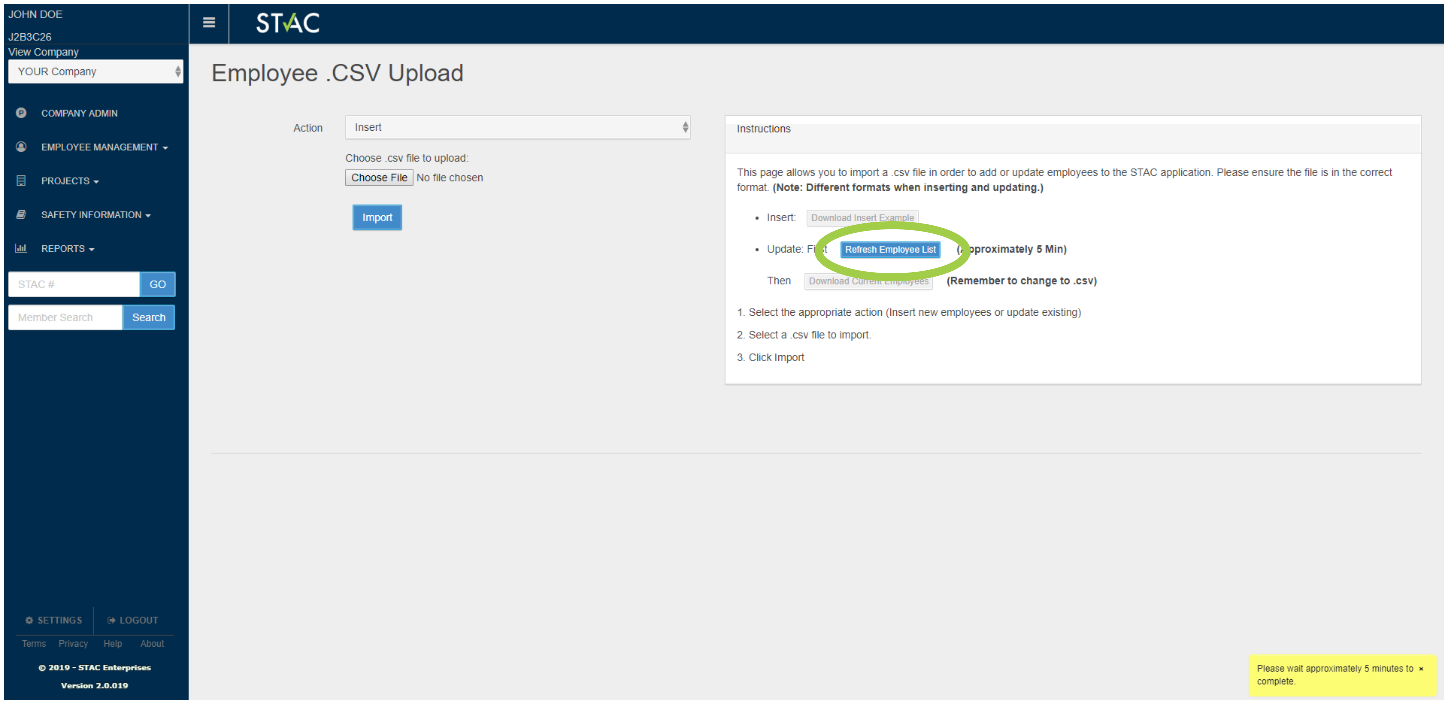


Once imported you will see a CSV results section. If the number of CSV Data Rows matches the Rows Saved, all information was imported correctly. If these numbers do not match, check the CSV Rows w/ Errors to view what problems need fixed.

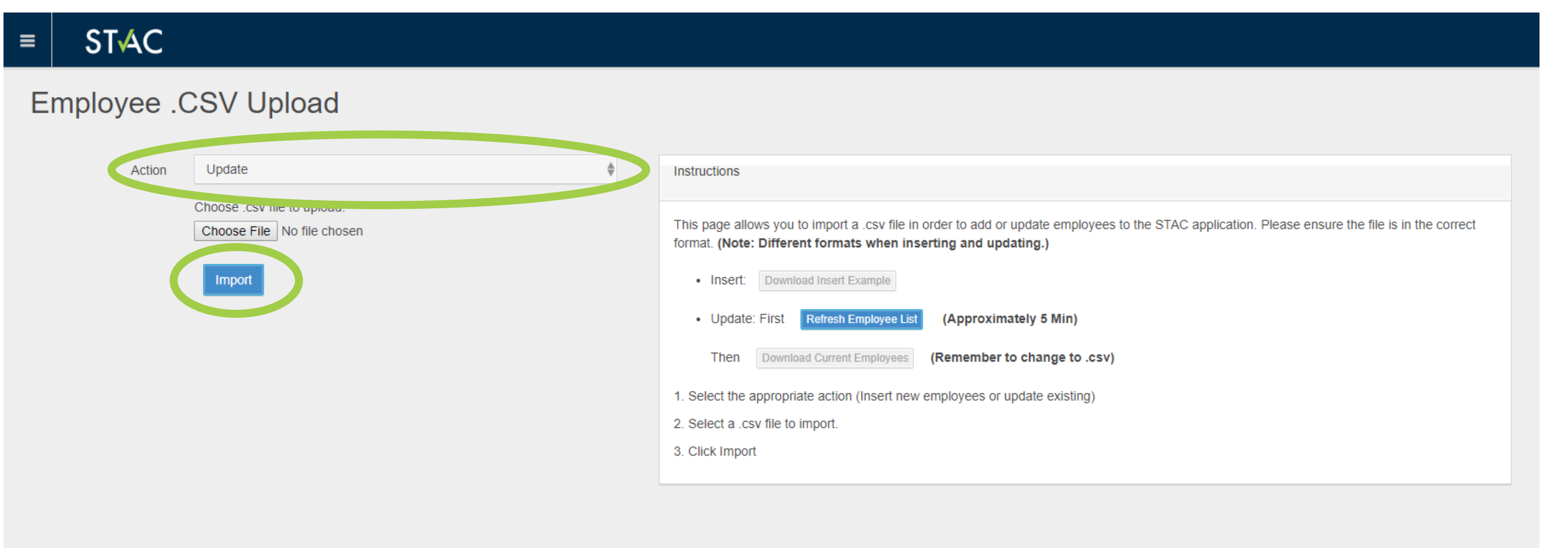


Update:

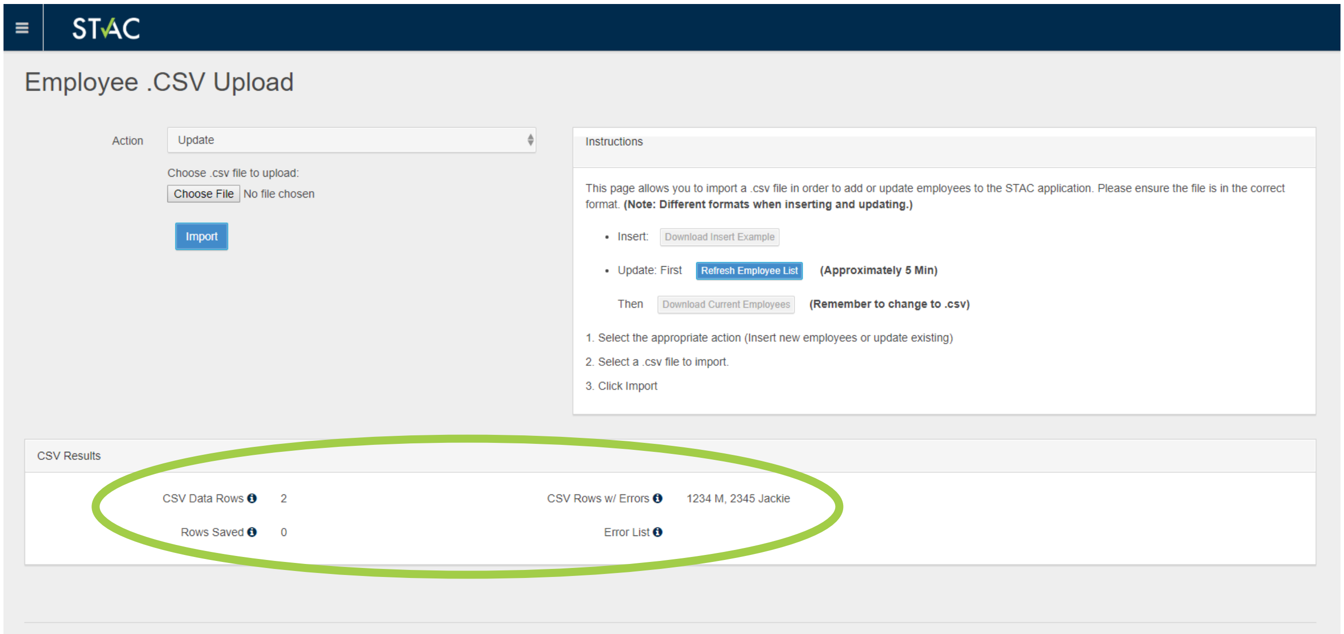
To update existing employee information, you will first need to refresh the employee list by clicking the "Refresh Employee List" button.



You will need to wait a few minutes to allow the list to update. Once you have waited, click the "Download Current Employees" button. This will open the employee list as an excel to edit (if you receive an error during download, refresh Employee List again and wait an additional amount of time). Once the list is updated, save the file as a CSV document. Under the action dropdown select Update, choose your csv file and click Import.



Once updated you will see a CSV results section. If the number of CSV Data Rows matches the Rows Saved, all information was updated correctly. If these numbers do not match, check the CSV Rows w/ Errors to view what problems need fixed.

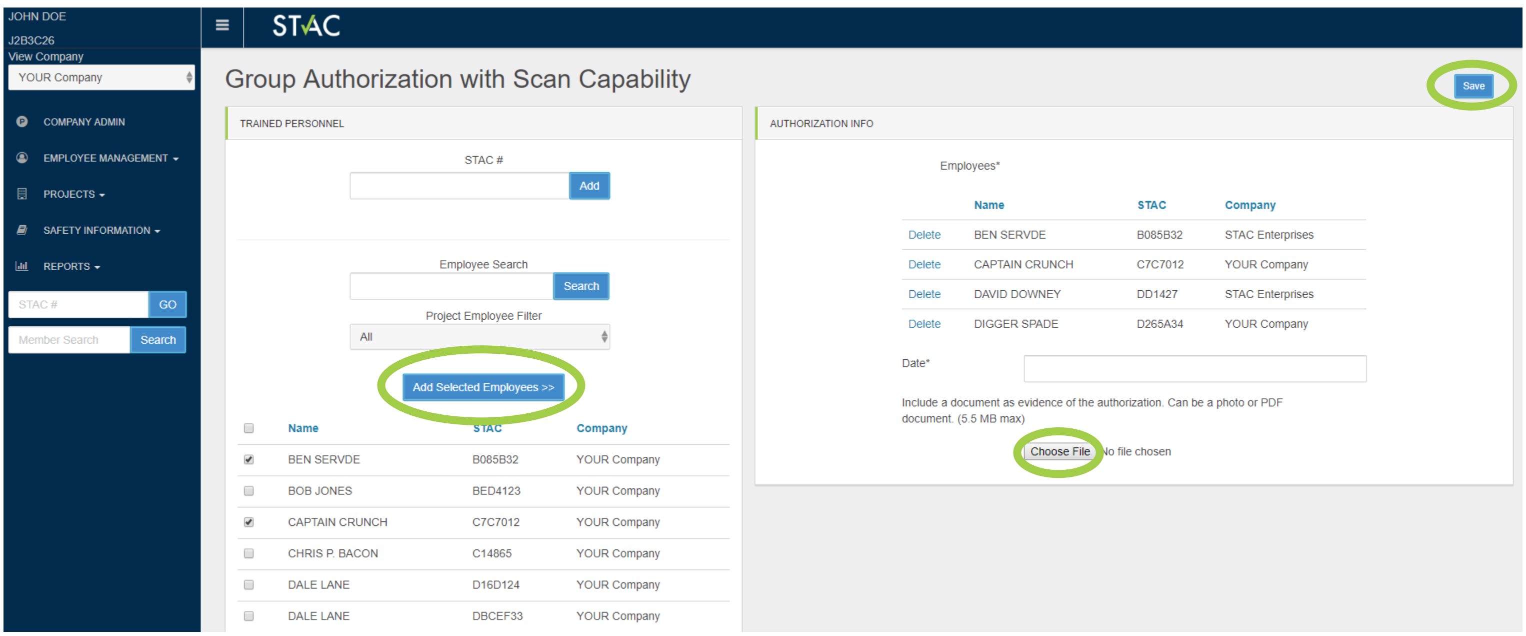


Add Authorization:

YouTube Tutorial: https://youtu.be/9uI3jNLQswg

Employee Authorization forms are used to confirm your employees have given consent to share their personal information. These forms are not required to use STAC, however they are encouraged due to ever changing privacy laws and regulations.

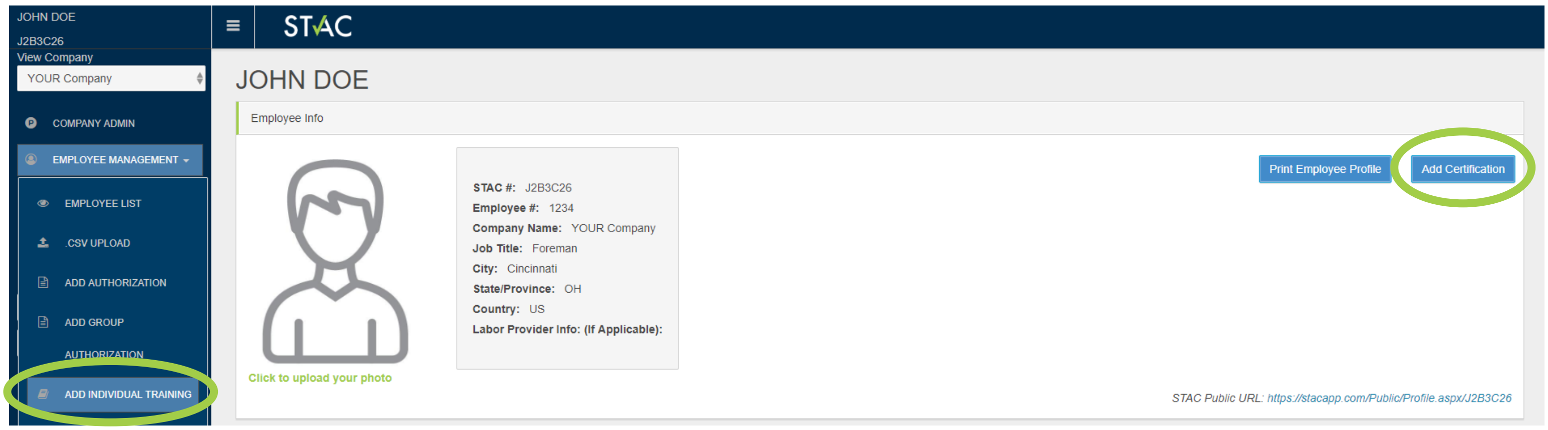
The authorization form for an employee(s) is uploaded by either scanning/swiping their badge or by selecting their names from the employee list. Once all employees have been scanned/swiped or selected, click the "Add Selected Employees" button. This will populate your selected employees to the right of the screen for review. Add the date they signed the form (dd/mm/yyyy), select the file, and then hit save at the top right-hand corner. The authorization is then added to employee profile(s) as proof of their consent.



Add Individual Training:

YouTube Tutorial: https://youtu.be/KPg9yJI6ABY

There are two places to add an Individual Training for one employee. The first is under "Add Individual Training". The second is within their employee profile by clicking "Add Certification".



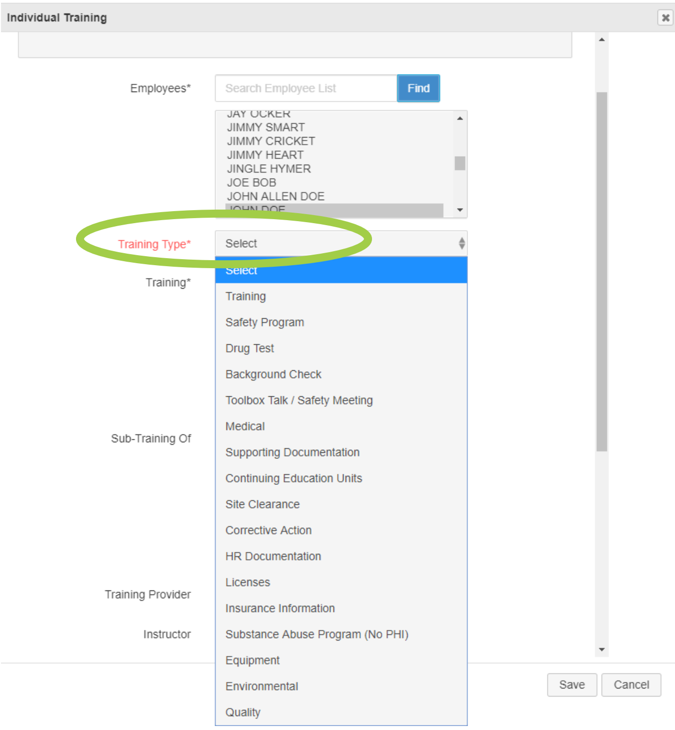
When selecting Add Individual Training, the first step will be to select the employee. If you are on an employee profile and click "Add Certification" that employee will automatically be selected for the training.

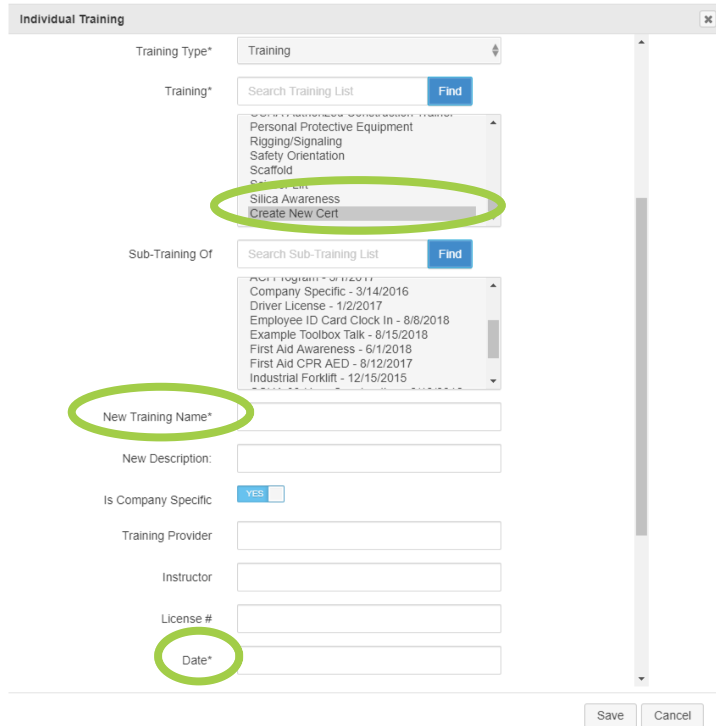
You will then select a training type. These training types are how information is grouped within an employee profile. Once a training type is selected, you must choose the type of training. Select a training from the list or select 'Create New Cert' from the bottom of the list to create a new training name not listed (If you are creating a new cert, the New Training Name is required. When creating a new cert, make sure the Company Specific button is turned to Yes so this will only be viewable for your company).

The 'Sub-Training Of' function will be used for refresher courses that relate to a specific training (ex. HAZWOPER yearly refresher would be a sub-training of the HAZWOPER cert).

Then input the date the training was taken in the dd/mm/yyyy format. The remaining information (Training Provider, Instructor, License, Expiration Date, Retrain Date) are optional but are encouraged to track when things are set to expire. Lastly, select an image file (pdf, png, jpeg) to upload and click "Save".

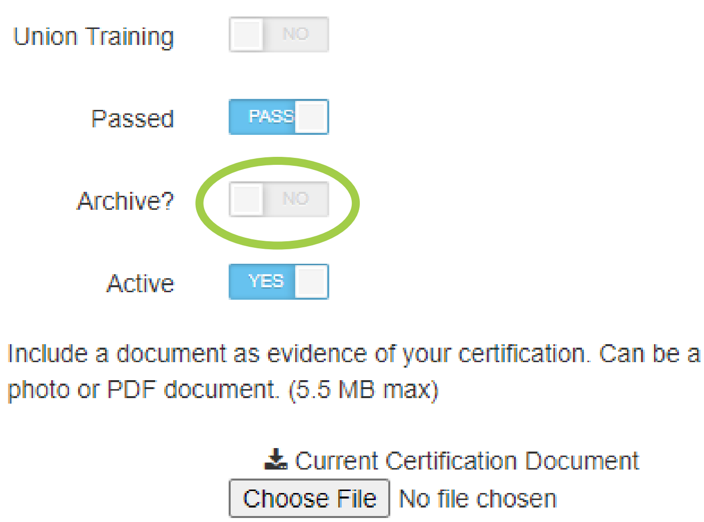
Once saved the individual trainings will be viewable on the employee's profile under the provided training type. These trainings can be edited by clicking Select to open the training window.





Archive Function

Once a training has expired or is no longer relevant, this training can be archived. Archiving the training does not remove the training but allows it to be hidden from view so only relevant training is shown. To archive a training, go to the employee's profile and select the training, scroll to the bottom of the page, and check the "Archive" button from No to YES. Once saved the training is hidden from view. To view archived training, click the "Hist" checkbox located along the top of the Training Type. The archive function is available for both individual and group trainings.



TRAINING

Public ON

Hist.	Name	Completed	Expiration	Lic. #	Doc	Related
Select	Company Specific Training	1/3/2021				
Archived	New Training	11/8/2019				
Select	New Training	7/31/2022	7/31/2023			

Auto Archive Function

A training will be automatically archived when a new training with the same name is added with an expiration date. This automatic archive will hide the old training so only the new training with the updated expiration date is visible. An example of this function would be an annual training such as Rough Terrain Forklift has been taken and it is time for recertification. Once the training is added again with a new training date and expiration, the current training will be archived automatically. The auto archive function works for both individual and group trainings.

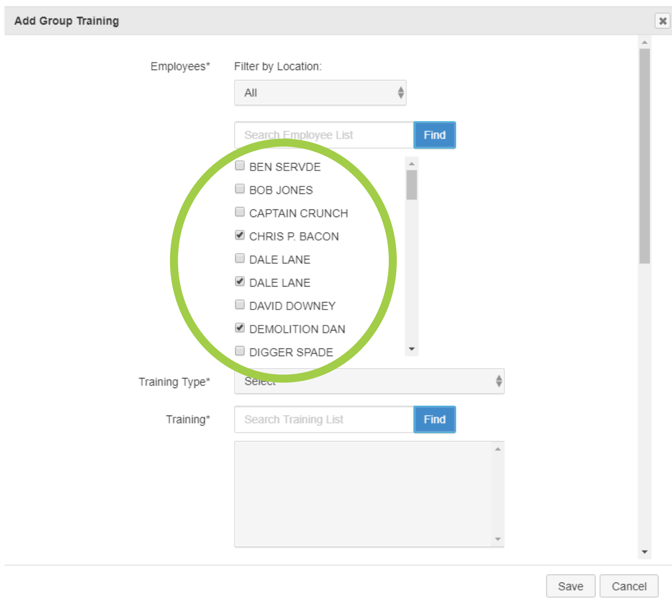
TRAINING

Public ON

Hist.	Name	Completed	Expiration	Lic. #	Doc	Related
Archived	Rough Terrain Forklift	7/31/2018	7/31/2021			
Select	Rough Terrain Forklift	7/31/2021	7/31/2024			

Add Group Training:

The Add Group Training function allows you to create a group training for multiple employees with one document attachment. To assign multiple employees, click the box next to the employee. From here, the steps are the same as <u>Add Individual Training</u>. Once saved, this group training will then be assigned to each individual employee profile with the same attachment. The training can be viewed and edited for each individual by clicking "Select" next to the training within the employee profile. See <u>Edit Group Training</u> to edit training for all individuals.



Add Group Training (Scan):

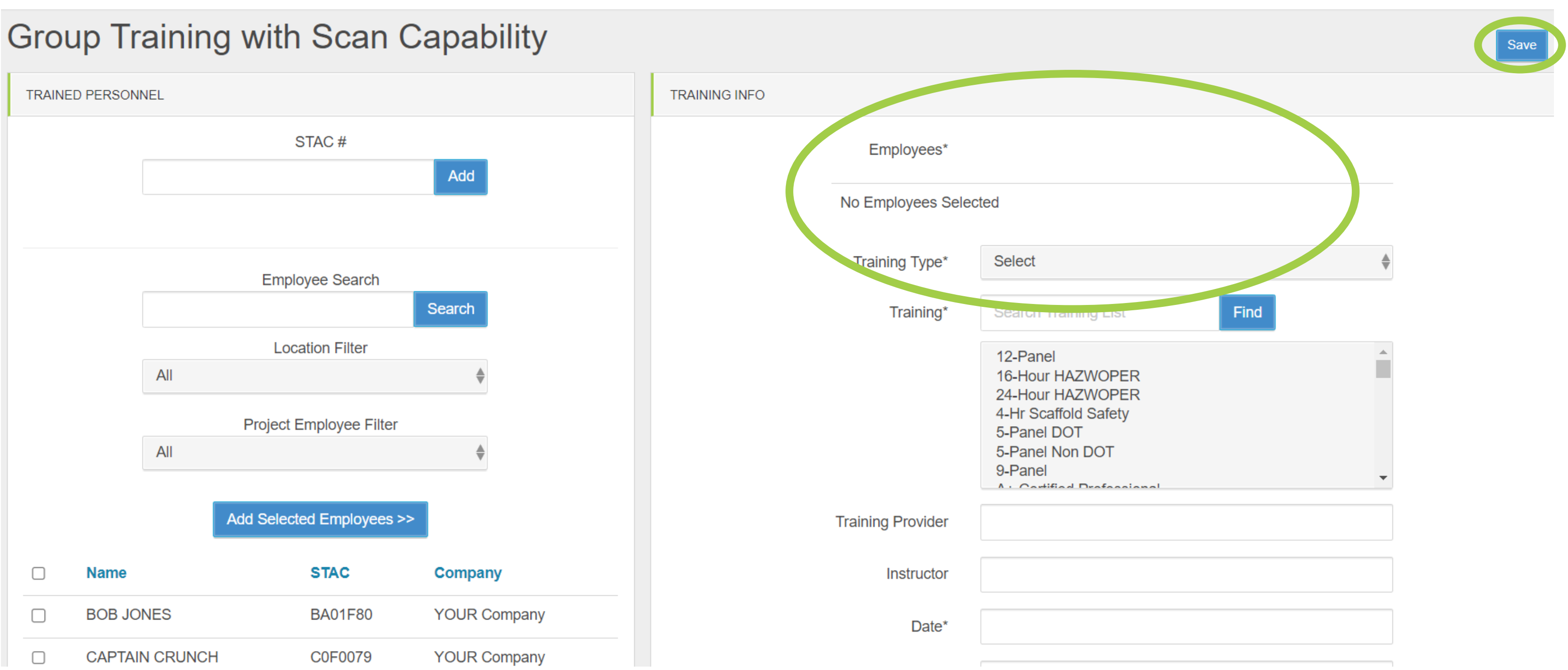
YouTube Tutorial: https://youtu.be/ajLPT-HiglI

The Add Group Training (Scan) allows for ability to create a group training by scanning, swiping, or manually inputting the employees that are involved in the training.

Scan/Swipe:

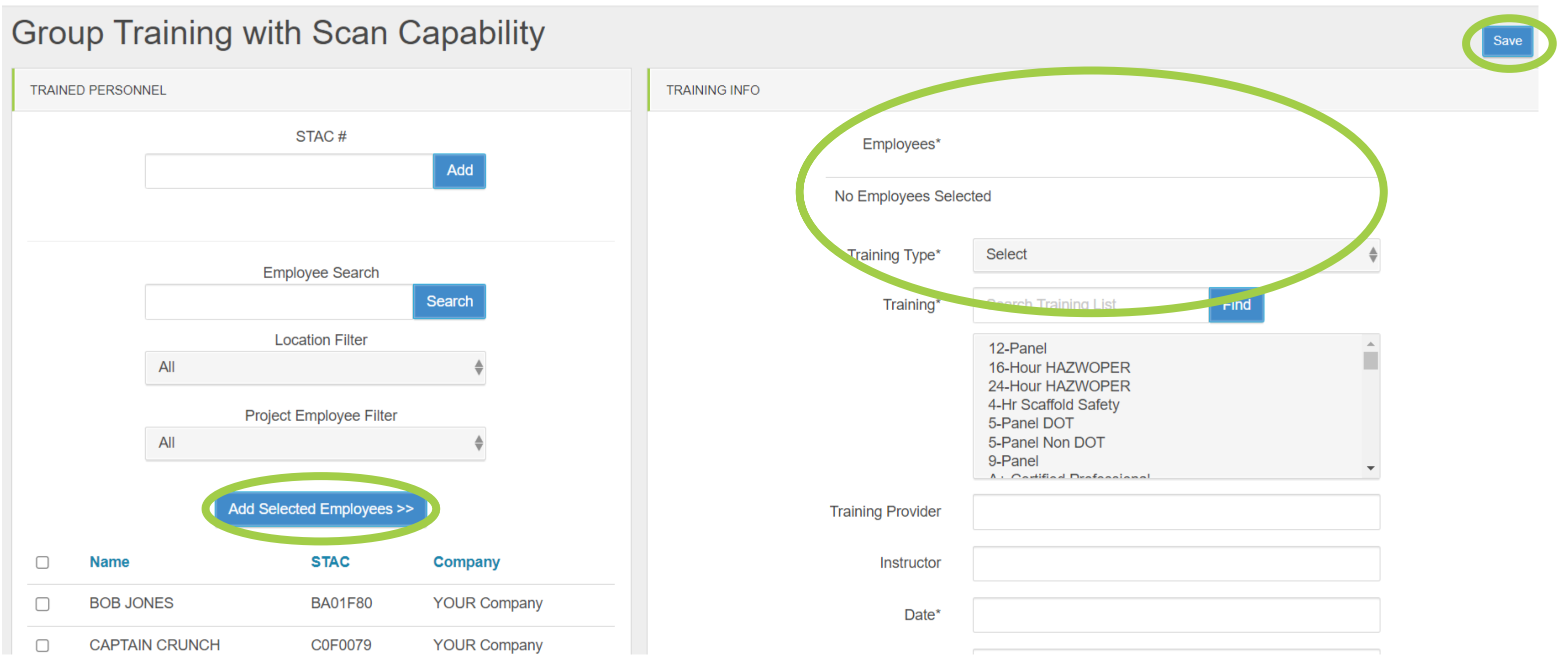
The scan/swipe capability requires the employee profiles to already be uploaded into the STAC database. These functions also require additional hardware (2-D bar scanner or magnetic strip reader) and the employee card/sticker to be present.

To add employees to the training, you will either scan their QR code or swipe their card. These employees will then be added to the right-hand side of the screen as Selected Employees. Once all employees have been scanned/swiped, review the names at the top of the right-hand side of the page then fill out the remaining training information using the same steps as the Add Individual Training option above. Once the information is complete and the image file (pdf, png, jpeg) has been uploaded, click the "Save" button at the bottom of the page or in the right-hand corner. The training can be viewed and edited for each individual by clicking "Select" next to the training within the employee profile. See Edit Group Training to edit training for all individuals.



Manual Input:

The Add Group Training Scan can also be used for manual entries without the scan/swipe function. Select employees by clicking the box next to their name. Once selected click the "Add Selected Employees" button to populate them to the right-hand side of the page. Once all employees have been selected, review the list of employees and follow the steps within Add Individual Training to complete the information. Once the information is complete and the image file (pdf, png, jpeg) has been uploaded, click the "Save" button at the bottom of the page or in the right-hand corner. The training can be viewed and edited for each individual by clicking "Select" next to the training within the employee profile. See Edit Group Training to edit training for all individuals.

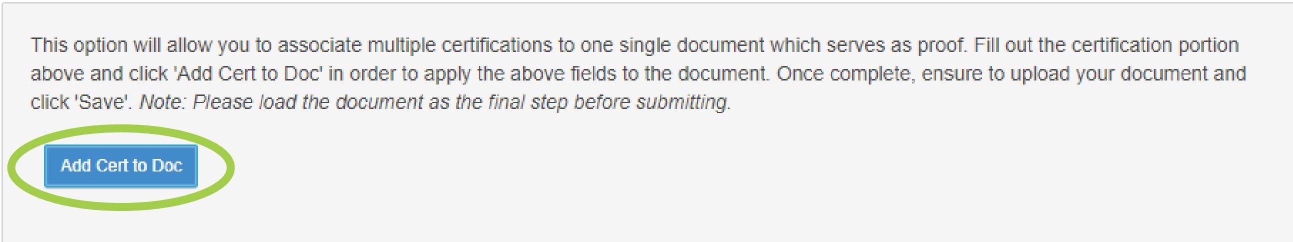


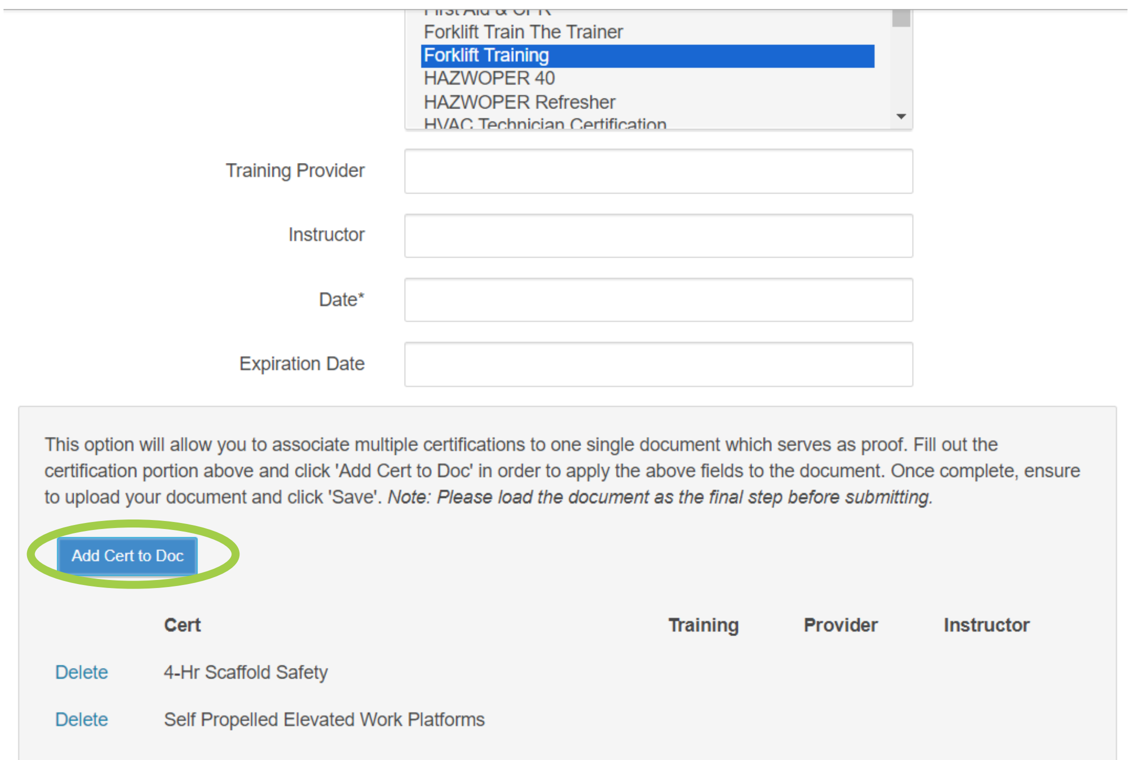
Add Cert to Doc:

YouTube Tutorial: https://youtu.be/T8dt58-v7mc

The Add Cert to Doc function found within the Add Group Training allows the ability to upload multiple group trainings using the same employees and the same document. An example of when this function could be used is if a single sign-in sheet were used for multiple trainings (ex. Fall Protection, PPE, and Employee Orientation all covered in same day using the same sign-in sheet).

This function works by completing the training information as you would for the Scan/Swipe or Manual Input. Prior to uploading the image file (pdf, png, jpeg) and clicking save, you will click the "Add Cert to Doc" button to create the next training that will be associated with the upload document.

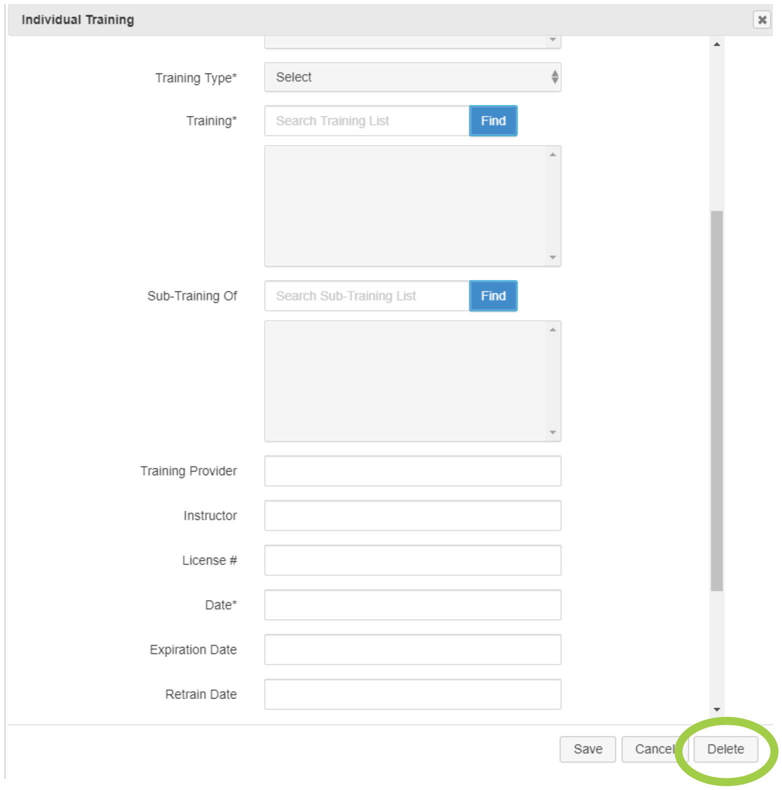




Fill out the next training information for the additional trainings until you are on your last group training. Once you have completed your last group training, upload the image file (pdf, png, jpeg) for all trainings and click "Save". These group trainings will be saved individually for each employee profile as separate trainings with the upload document. The trainings can be viewed and edited for each individual by clicking "Select" next to the training within the employee profile.

Delete Function:

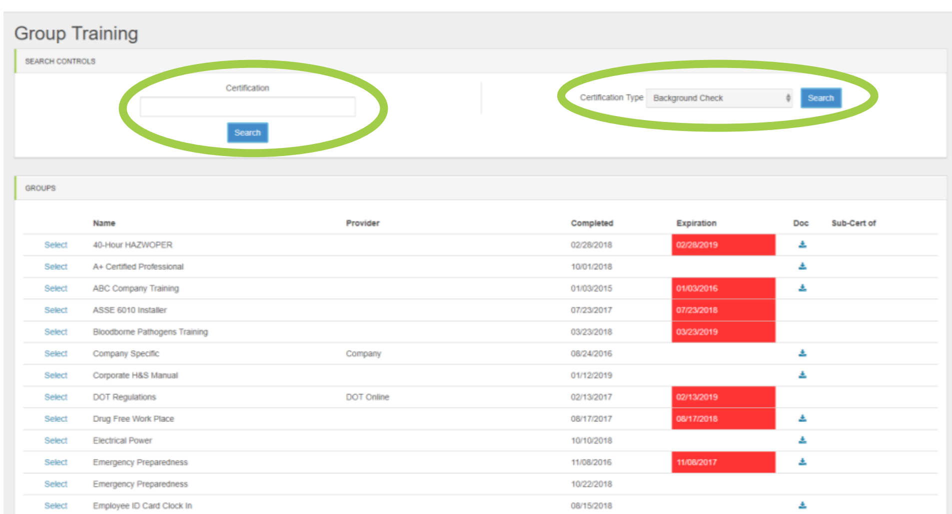
If you need to delete a training, the Delete Function can be found when editing the training. Select the training that you wish to delete by clicking the "Select" button within the employee profile. In the lower right-hand corner, click the "Delete" button. If a training has been deleted by accident, please notify STAC as soon as possible to restore the training. If STAC is not notified, the training will be deleted indefinitely.



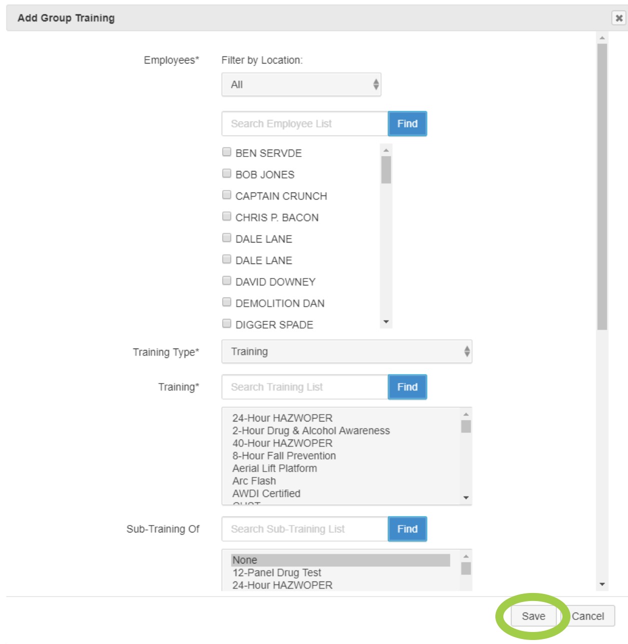
Edit Group Training:

YouTube Tutorial: https://www.youtube.com/watch?v=o88aN9tcvvg&feature=youtu.be

Edit Group Training is used to edit a group training as a whole, instead of on the individual side. Certifications can be searched using the search bar or certification type dropdown along the top of the page. To edit a certification, click the "Select" button next to the certification.



When selected, the group training popup will allow you to edit the training information like shown in the Add Group Training function. Employees can be added/removed, information changed, or the group training can be deleted. Once all information is changed click "Save" to complete changes.



Delete Function:

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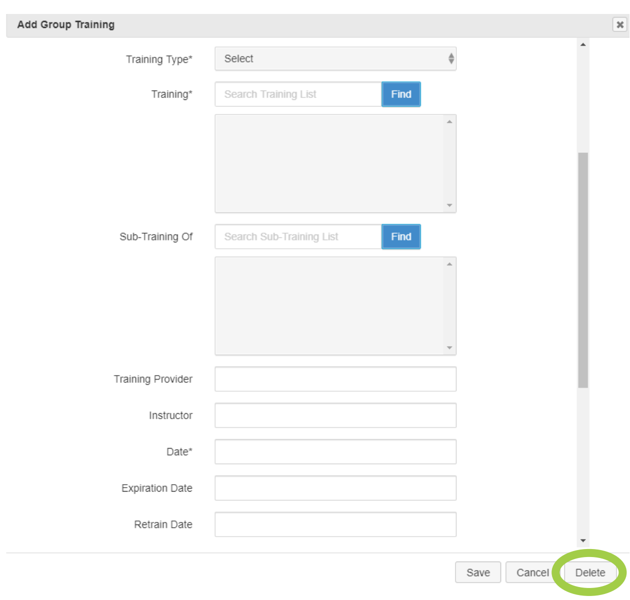


View Requests:

View Requests allow users to see Certification Requests that have been submitted to STAC for review. All background checks, drug tests, and medical information are submitted to STAC for review prior to being uploaded to the employee's profile STAC's review process is to ensure the correct name on the document is displayed on the correct profile for privacy concerns.

View Requests Status

AUTHORIZATION REQUESTS - LAST 60 DAYS

Name	Authorized Date	Approved?	Reason	Last Update
JAY OCKER	06/05/2019	✓		06/06/2019
NEIL D IAMOND	06/05/2019	✓		06/06/2019
KNIGHT CLUB	06/05/2019	✓		06/06/2019
JIMMY HEART	06/05/2019	✓		06/06/2019
DIGGER SPADE	06/05/2019	✓		06/06/2019
KEVIN MCCALLISTER	05/07/2019	✓		05/07/2019

CERTIFICATION REQUESTS - LAST 60 DAYS

	Certification	Name	Date	Approved?	Reason	Last Update
Select	12-Panel Drug Test	JAY OCKER	03/30/2019	✓		06/06/2019
Select	12-Panel Drug Test	JIMMY HEART	04/14/2019	✓		06/06/2019
Select	12-Panel Drug Test	DIGGER SPADE	05/14/2018	✓		06/06/2019
Select	Background Check	KNIGHT CLUB	06/04/2017	✓		06/06/2019
Select	12-Panel Drug Test	NEIL D IAMOND	11/20/2018	✓		06/06/2019

Background Checks & Drug Tests:

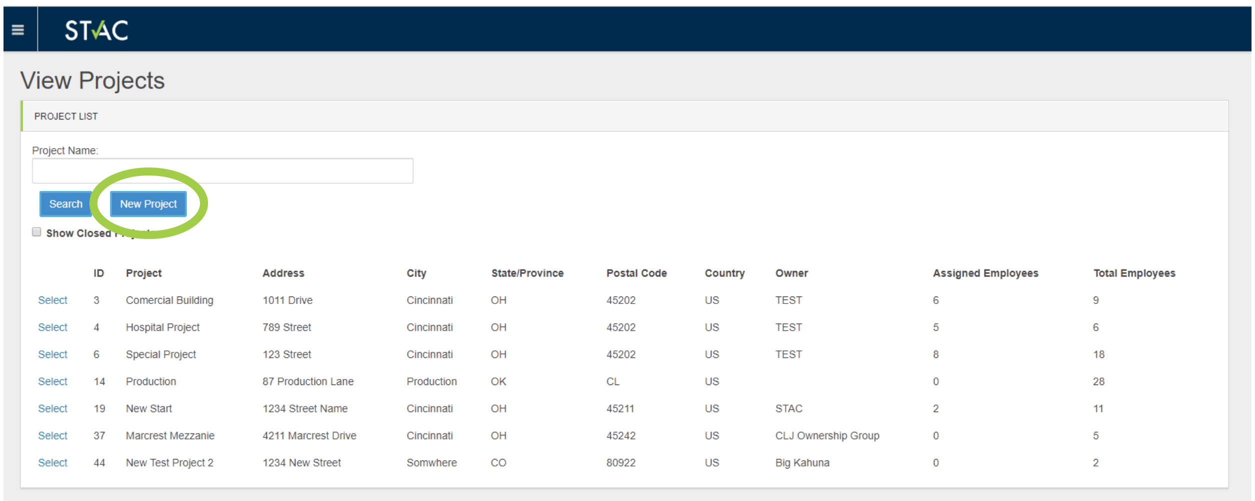
Background Checks and Drug Tests is currently in development. When complete, this portal will house information regarding employee drug tests such as ordering, reviewing tests, and payment with a partner company. Email contact@staccard.com for more information.

Projects

Project List:

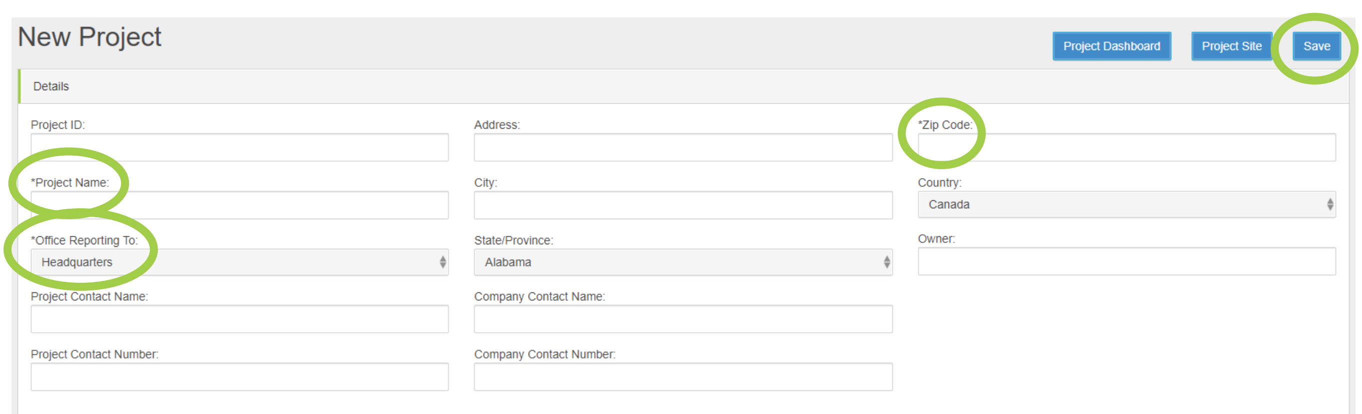
YouTube Tutorial: https://youtu.be/yAtcMUSPWMY

The Project List is where you can view, edit, and assign requirements to projects for your employees. New projects can be created by clicking the "New Project" button.



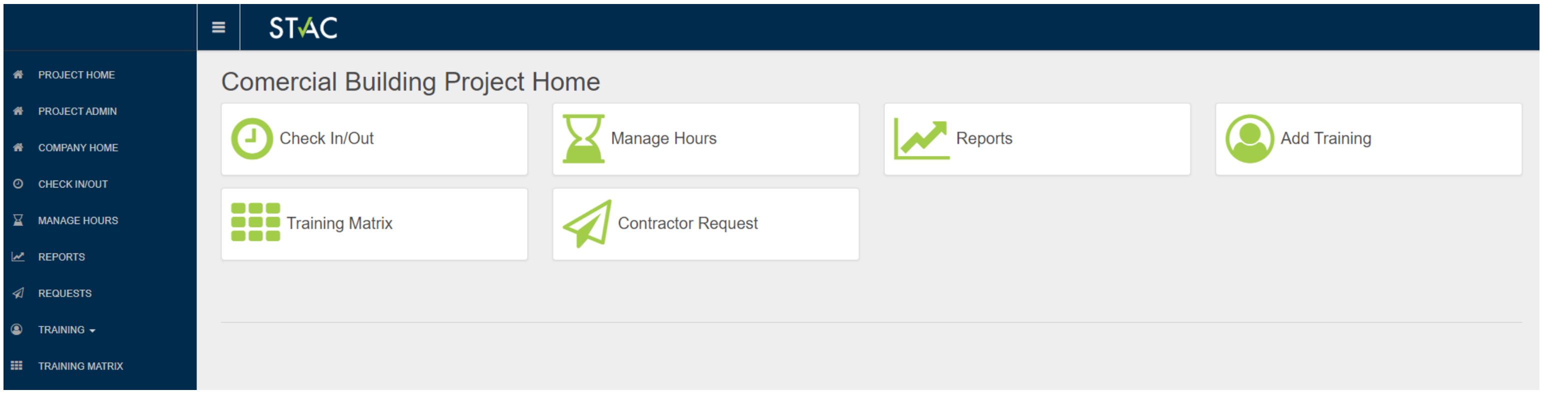
New Project:

For new projects the Project Name, Office Reporting To, and Zip Code are required. All additional information is optional. Management requirements can be added for each project using the [Management](#) feature. Once all information is completed click the "Save" button in the top right-hand corner.



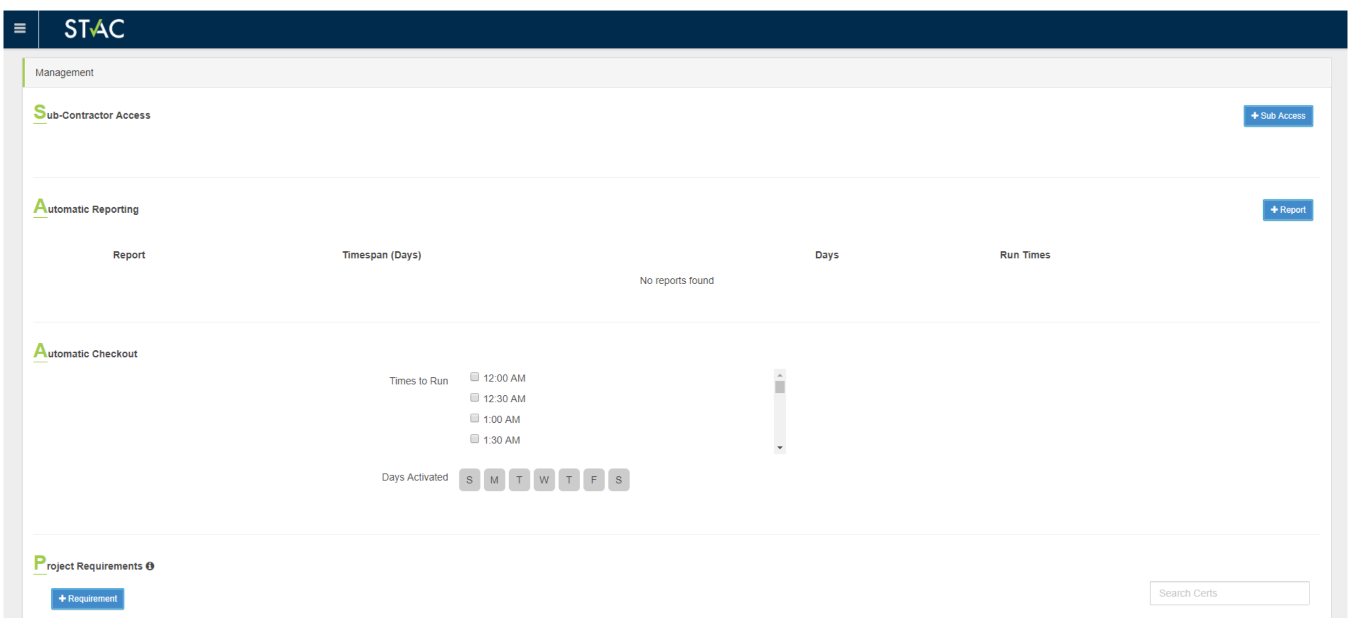
Project Site:

The Project Site is the application used to track employees based on the [Management](#) features below. This allows contractors to check-in employees to a project site, manage hours, run labor reports, add trainings specific to the project and run a Training Matrix for project employees. For more information regarding the Project Site email contact@staccard.com or review the Project Site User Guide.



Management:

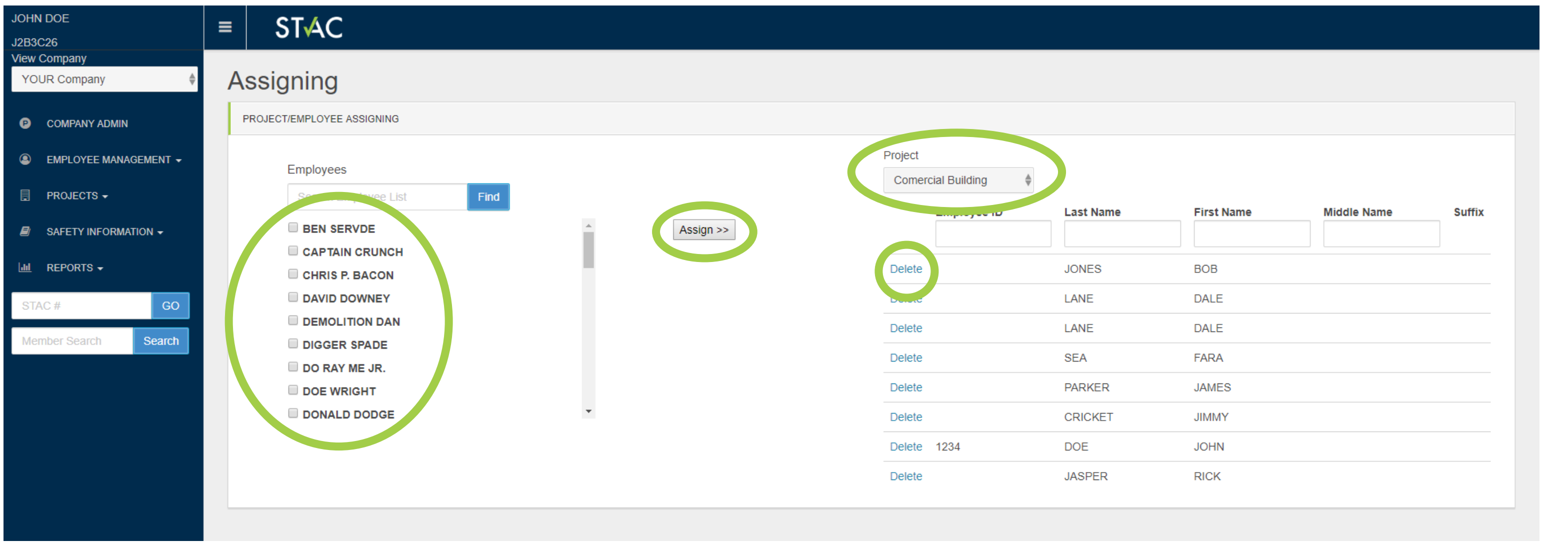
The Management feature allows companies to add certain access and requirements for project sites (mainly used by General Contractors). For more information regarding the Management feature email contact@staccard.com or review the Project Site User Guide.



Project Assigning:

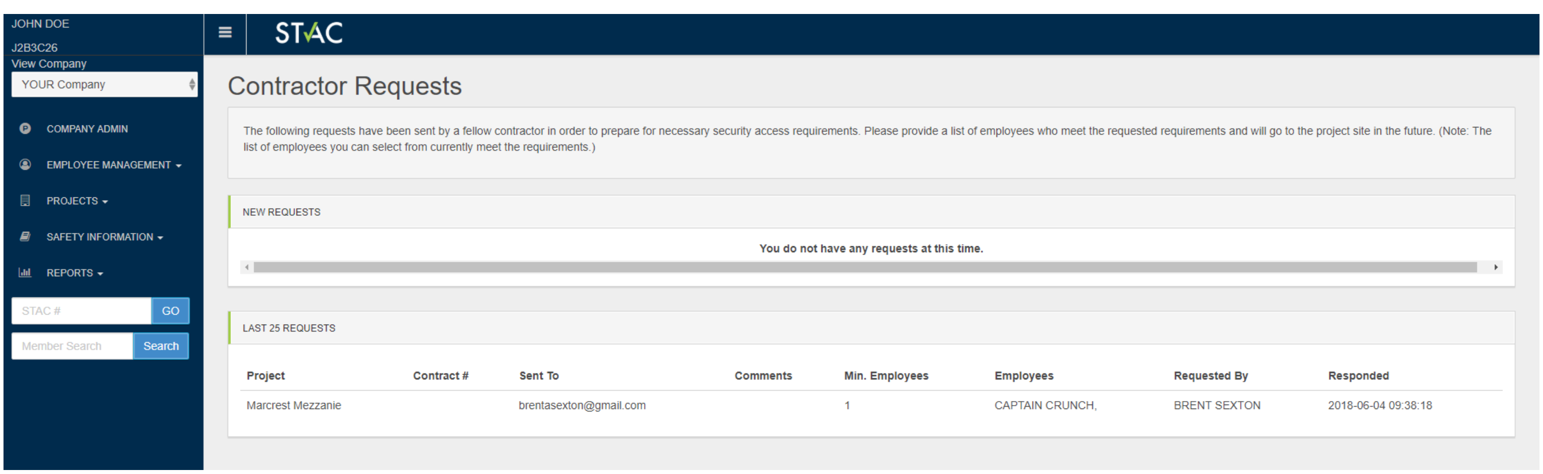
YouTube Tutorial: https://youtu.be/oA--IFjqOIw

The Project Assigning feature allows you to add multiple employees to a project at once. You will select the project in which to add employees by using the Project drop down. Once the project is selected you will select your employees by using the Employees List and clicking the check box of who you want to add. Once all employees are checked, click the "Assign>>" button to add these employees to the Project. If you wish to remove employees from the project selected, click the "Delete" button next to the employee you want to remove.



Contractor Requests:

The Contractor Requests tab is the way to view requests sent by contractors to prepare for a project. These requests will have the requirements needed to access the project. Subcontractors can respond to these requests to provide information regarding the employees they plan on sending to the project.



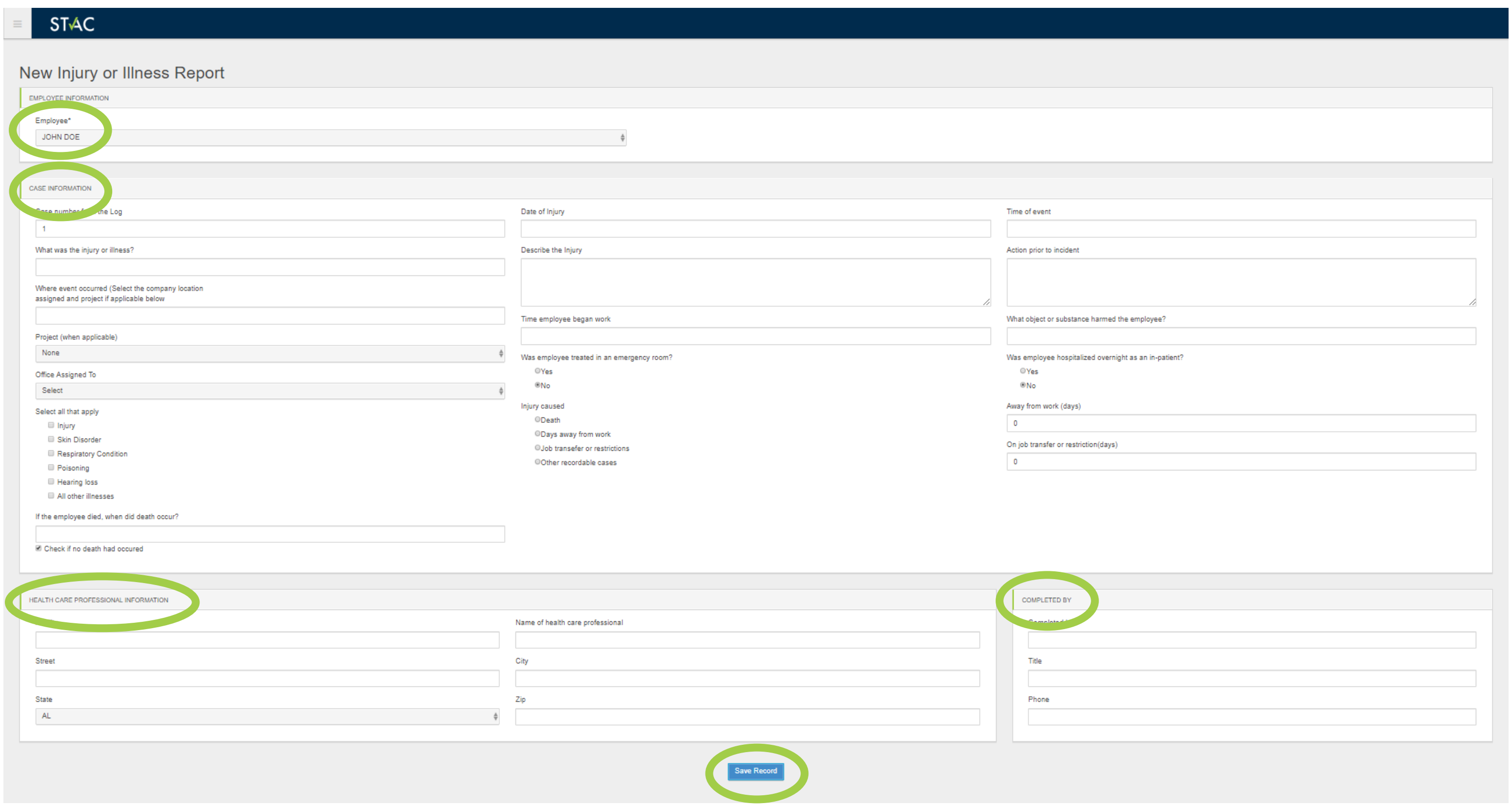
Safety Information

Add Incident:

YouTube Tutorial: https://youtu.be/g8hgYYg_TUc

Add Incident is the ability to add new injuries or illnesses for employees that occur on the job. These incidents can then be saved and added to the OSHA 300 log (see below).

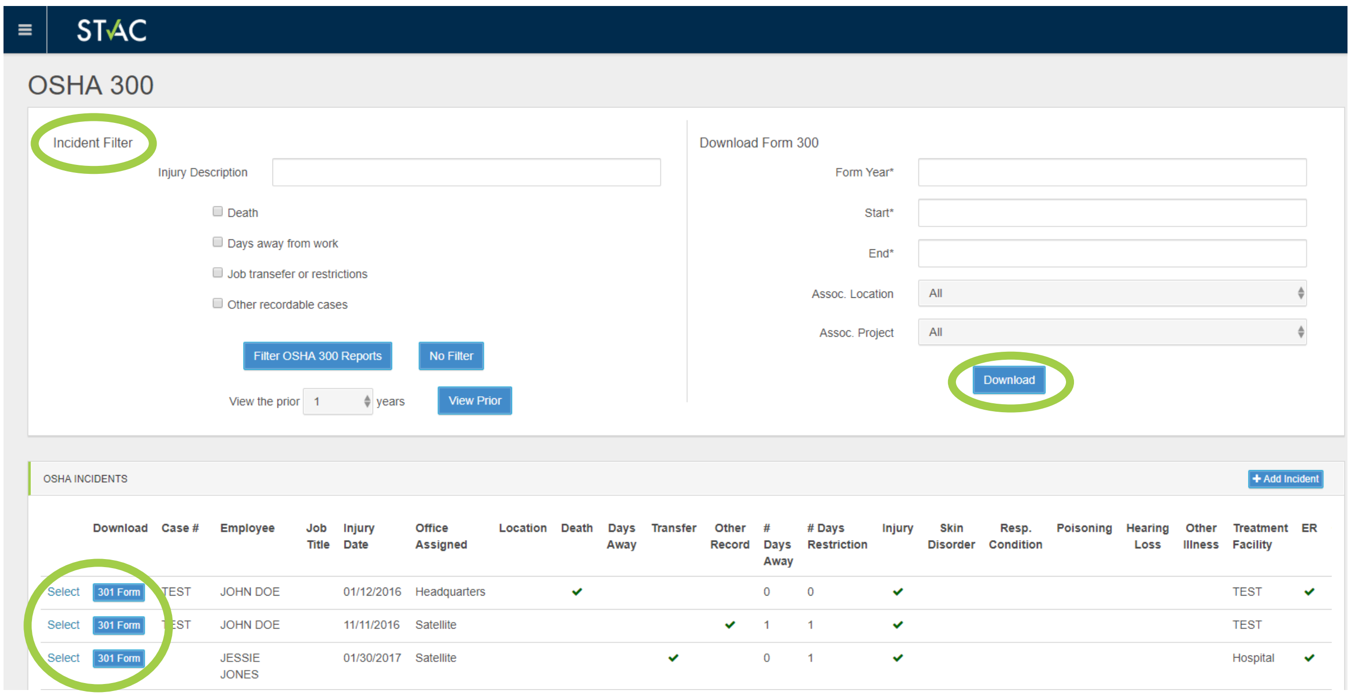
To add an incident, begin by selecting the employee that was injured. Fill out the Case Information, Health Care Professional Information, and Completed By tabs. Once the information is completed click the "Save Record" button at the bottom of the page to save the incident and add to the OSHA 300 log. If you do not have all the information available you may save the record and edit the information later.



View OSHA 300:

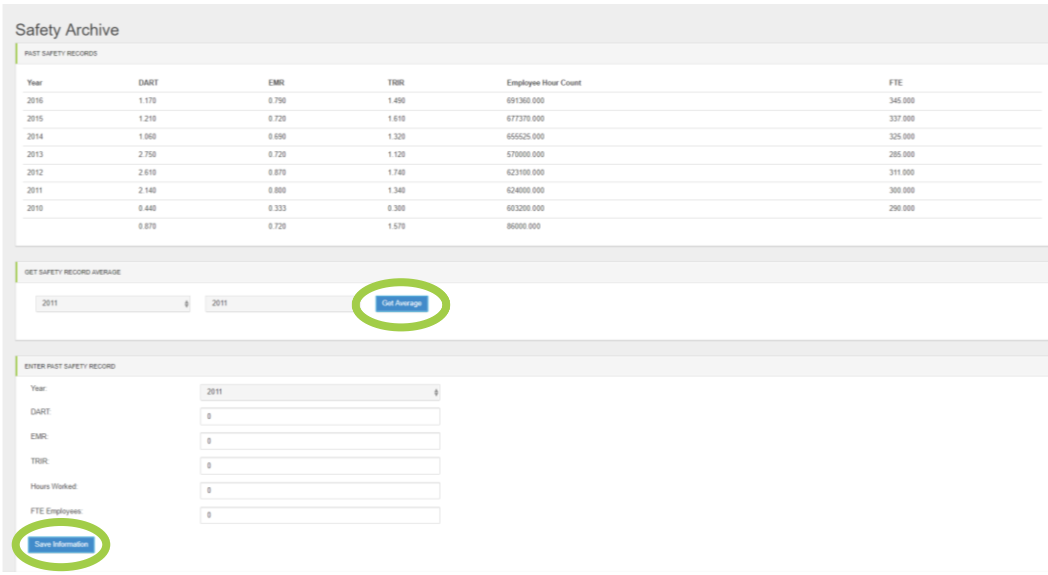
YouTube Tutorial: https://youtu.be/g8hgYYg_TUc

The View OSHA 300 log allows you to view recorded incidents using the [Add Incident] function. You can filter incidents by using the Incident Filter report. Incidents can be reviewed and edited under the OSHA Incidents tab. To edit an incident, click the "Select" button next to the incident. To download the OSHA 301 Form for an incident (.xlxs) click the "301 Form" button next to the incident. To download an OSHA 300 form, insert the Year, Start Date (dd/mm/yyyy), End Date (dd/mm/yyyy), and the Locations/Projects from the dropdowns. Once information is inputted click the "Download" button to download the OSHA 300 Log (xlsx).



Company Safety:

Company Safety allows you to archive safety information from previous years. To input information, use the Enter Past Safety Record tab to input the safety information. Once inputted click "Save Information" to add to the Past Safety Records. Averages can be found by selecting the year range and clicking the "Get Average" button.



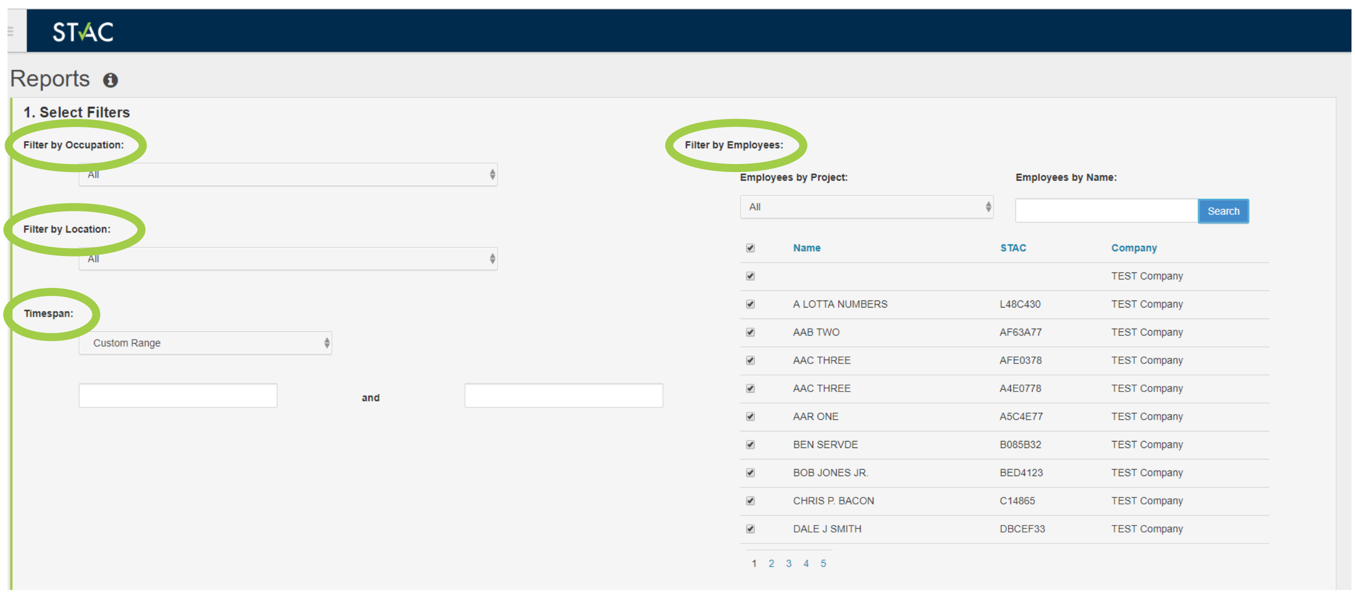
Reports

Certifications:

YouTube Tutorial: https://youtu.be/KfqGHKtCy9Q

Certification Reports allows reports to be ran when looking for employees with certain types of certifications. There are multiple filters for Occupation, Location, Project, and by Name along the top of the page. Individuals can be selected using the Filter by Employees and checking the box next to their name. Once filters are used, select the report you would like to run. Reports can be ran in 5 different ways:

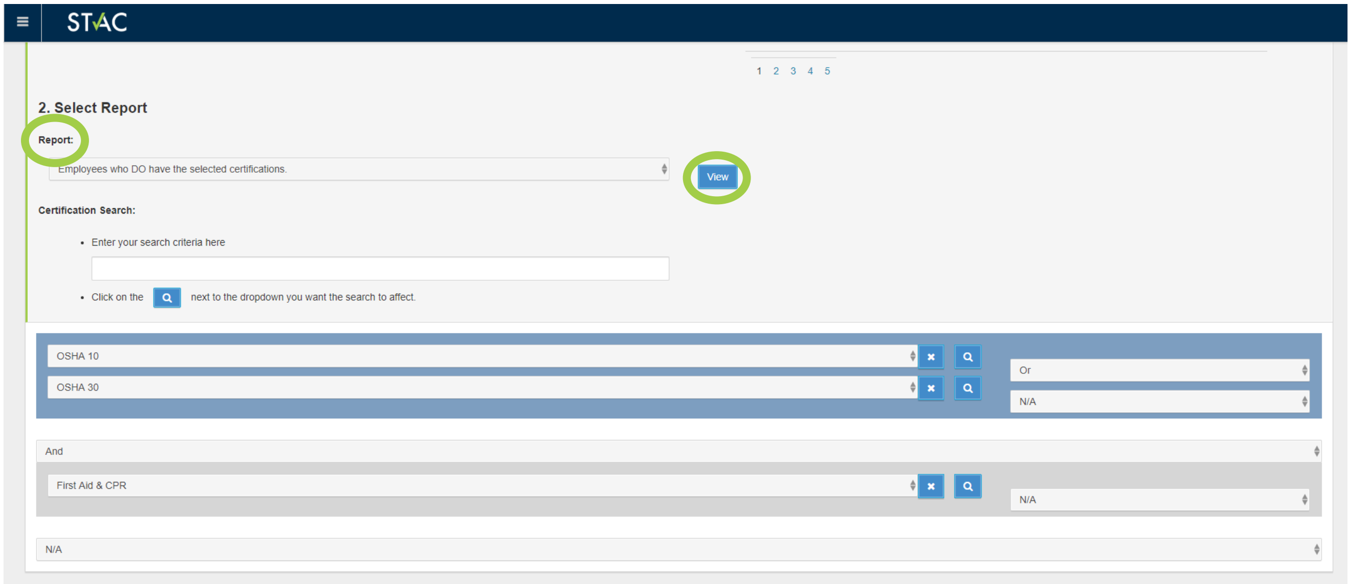
- **View ALL Certifications**
- **View Employees who DO NOT have the selected certifications**
- **View Employees who DO have the selected certifications**
- **Certifications Expiring within date range (Use the Timespan filter to select date range)**
- **Certifications Taken within date range (Use the Timespan filter to select date range)**



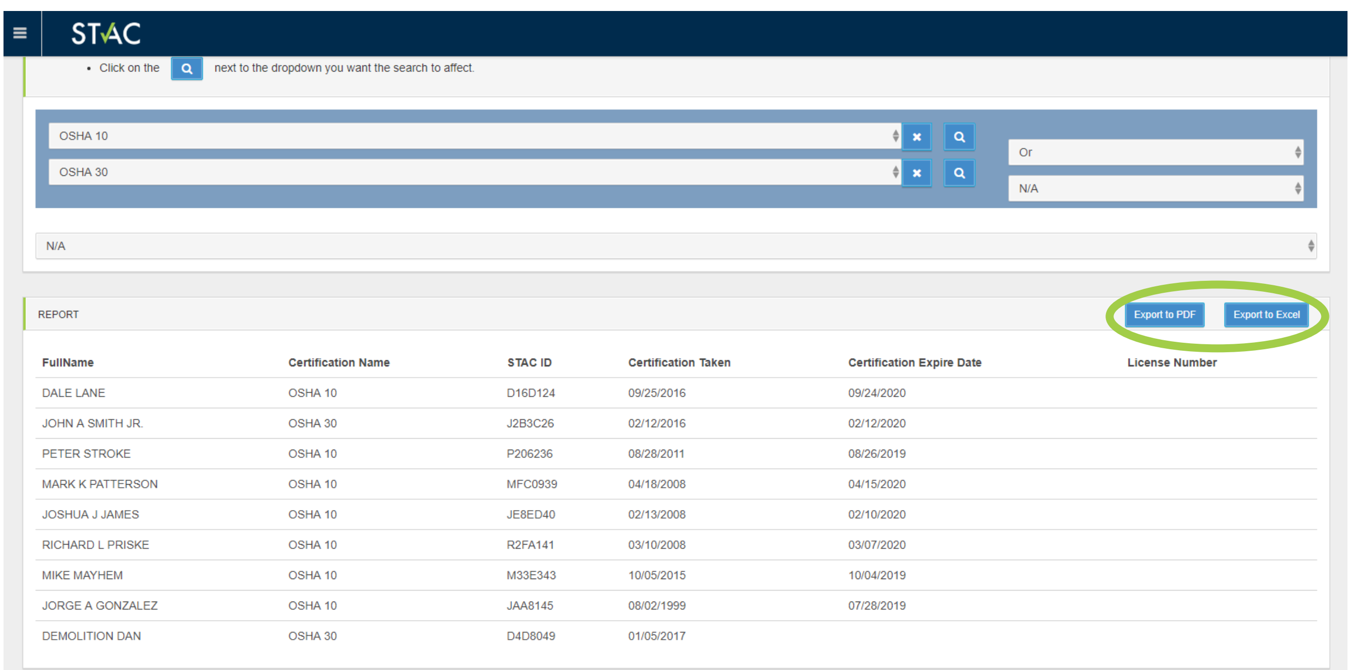
Once the type of report is selected, use the dropdown to select the type of certification you want to report. Additional certifications can be added by using the N/A, And, Or dropdowns.

- **N/A – No additional certifications to be viewed**
- **And – You want another certification to be required (you will see employees with both of these certifications)**
- **Or – You want to see which employees have one of the two certifications**

When the dropdowns are complete, click the "View" button next to the report type (ex. Report below will search for Employees who Do have an OSHA 10 or OSHA 30 card along with First Aid and CPR Training).



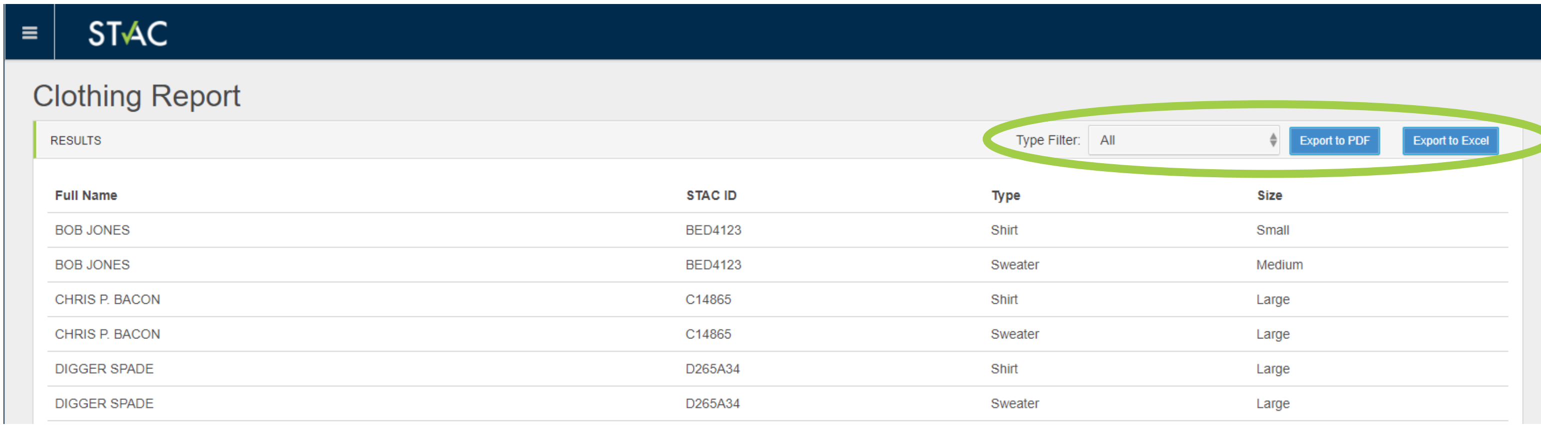
Once the View button is clicked, the Report will populate below. Reports will show the Name, Certification, STAC ID, Taken/Expiration Date, and License Number. Reports can then be exported to either a PDF or Excel by clicking the "Export to PDF", "Export to Excel" buttons on the right-hand side.



FullName	Certification Name	STAC ID	Certification Taken	Certification Expire Date	License Number
DALE LANE	OSHA 10	D16D124	09/25/2016	09/24/2020	
JOHN A SMITH JR.	OSHA 30	J2B3C26	02/12/2016	02/12/2020	
PETER STROKE	OSHA 10	P206236	08/28/2011	08/26/2019	
MARK K PATTERSON	OSHA 10	MFC0939	04/18/2008	04/15/2020	
JOSHUA J JAMES	OSHA 10	JE8ED40	02/13/2008	02/10/2020	
RICHARD L PRISKE	OSHA 10	R2FA141	03/10/2008	03/07/2020	
MIKE MAYHEM	OSHA 10	M33E343	10/05/2015	10/04/2019	
JORGE A GONZALEZ	OSHA 10	JAA8145	08/02/1999	07/28/2019	
DEMOLITION DAN	OSHA 30	D4D8049	01/05/2017		

Clothing:

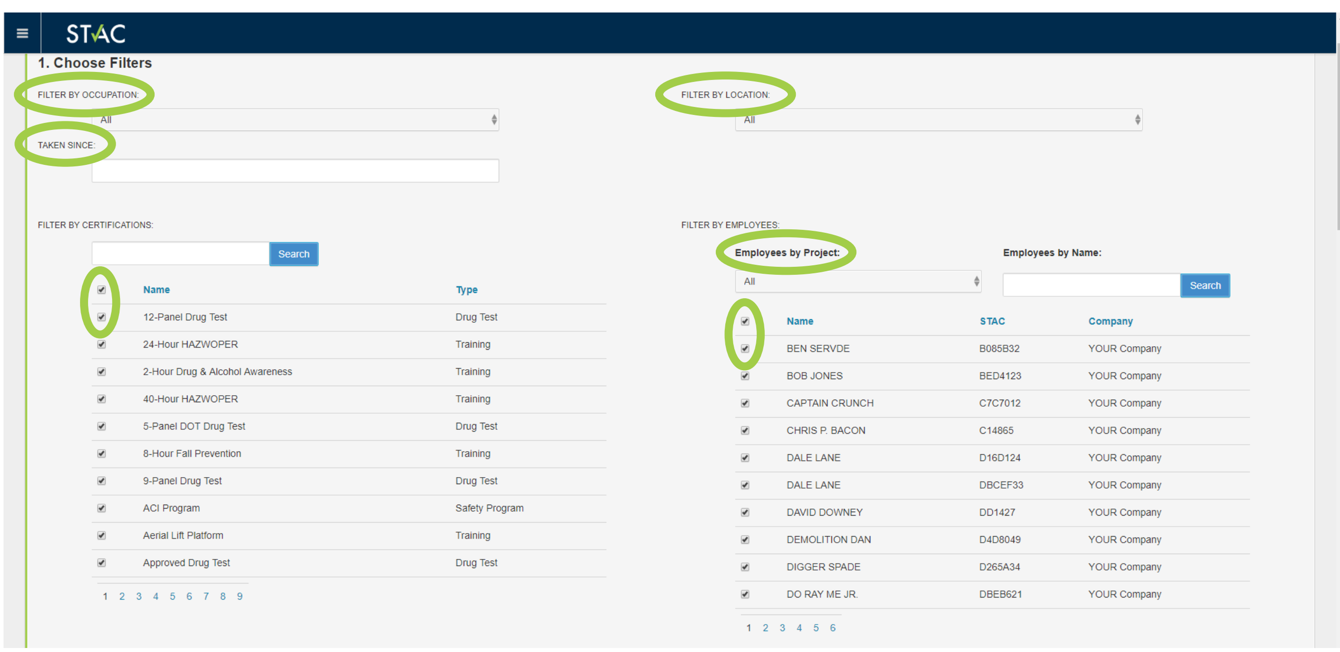
The Clothing Report allows reports to be ran for employee apparel items. This information is uploaded to the [Employee Profile] under Other Information. To download this report, click the "Export to PDF" or "Export to Excel buttons". Apparel items can be filtered using the Type Filter



Training Matrix:

YouTube Tutorial: https://youtu.be/BrIFszPJCcs

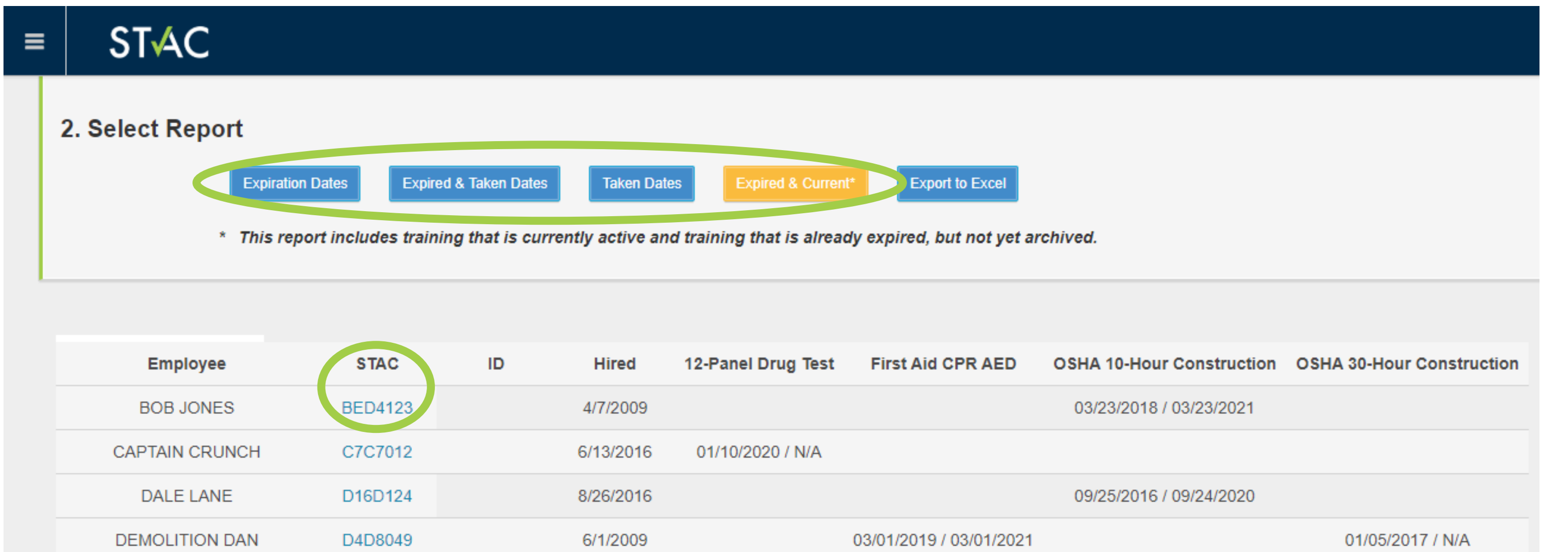
Training Matrix report allows reports to be ran for employees to show their certifications. The Filters can be used for Occupation, Location, Project, and Taken Since date. Certifications and Employees have filters to show what certifications you want to view for the given employees. Select certifications/employees by using the check box next to their names.



Once the filters are set, select the type of report you want to view by clicking one of the report buttons.

- Expired Dates – shows the expiration date of selected certifications
- Expired & Taken Dates – shows both the expiration and taken dates of selected certifications
- Taken Dates – shows the taken date of selected certifications
- Expired & Current* – shows all training that is current/expired but not archived

Reports will be ran below the report buttons (ex. Report ran is looking for drug tests, First Aid, and OSHA 10/30 cards with the Expired & Taken dates selected).



You can either export the report or view employee profiles by selecting the highlighted STAC ID of the profile you wish to view.

Once the report has been ran, the information can be exported to an Excel file by clicking the "Export to Excel" button next to the report buttons.