

# **Waste Management Safety Portal**

## **User Guide**

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# Portal

Enter the Portal URL into your web browser to navigate to WM Safety Portal.

**Portal Name** WM Safety Portal

**Portal URL** <https://www.wmsafetyportal.com>

## Step-By-Step Guides

### Step-by-Step Contractor Instructions



### Creating And Conducting a Course Classroom Session

1. Create a Classroom Session
  1. Navigate to the course.
  2. Click **Classroom Mode**.
  3. Click **New Online Session** or **New Offline Session** (one or both type may be available).
2. Add Session Details (*Optional*)
  1. Enter the session name, location, start/end date and time, notes.
  2. Click **Update Session Details**.
3. Add Attendees & Session Dates
  1. Click **Add Attendees**.
  2. Click the Sites drop-down and select a site.
  3. Click **Get Users**.
  4. Check the box for each session attendee.
  5. Click **Add Selected Attendees**.
  6. Add completion dates.
4. Download & Print Sign-In Sheet
  1. Click **Download Sign-In Sheet**.
  2. Locate and print the sheet.
5. Conduct the Course
  1. Click **Begin Course**.

2. Click **Continue** after each section finishes until the course has completed.
6. Complete, Upload & Verify the Sign-In Sheet
  1. Have attendees sign and date the sign-in sheet.
  2. Facilitator signs and dates sign-in sheet.
  3. Scan the sign-in sheet.
  4. Click **Upload Sign-In Sheet**.
  5. Locate and select the file.
  6. Click **Verify**.
  7. Update the attendee list and completion dates until they match the sign-in sheet.
    1. To remove attendees, check the box for their names and click **Remove**.
  8. Click **Close**.
7. Download, Deliver & Review Site-Specific Documents With Attendees
  1. Click **Download** for each site to save Site-Specific documents to your computer.
  2. Print out and review the Site-Specific documents with the employee(s) listed for each site.
8. Finalize the Session
  1. Click **Finalize Session**.
  2. Click **Finalize**.

# Register Company & Login

## Register Company

If this is your first time visiting WM Safety Portal, you will need to create an account for yourself and register your company.

1. Go to <https://www.wmsafetyportal.com>.
2. Click on **Register Your Company**.
3. Follow the on-screen instructions to complete the four-step process.
  1. Create Account - Your personal WM Safety Portal account.
  2. Update Profile - Your personal profile information.
  3. Register Company - Your company information
  4. Select Sites - The Waste Management site(s) where your company will perform work.

## Login

If you already have a username and password, log in using the following instructions.

1. Go to <https://www.wmsafetyportal.com>.
2. Click **Login**.
3. Enter your username and password.
4. Click **Login**.

*Note: After successfully logging in for the first time, you may be asked to change your password.*

# Manage Company

## Navigate to Company Management

1. Log into <https://www.wmsafetyportal.com>.
2. Click on **Manage Company**.

## Edit Company Information

1. [Navigate to your Company Management page](#).
2. Click on the **General** tab.
3. Modify company information, location, and contact information.
4. Click **Update Company** to save any changes.

## Add Sites To Company

1. [Navigate to your Company Management page](#).
2. Click on the **Sites** tab.
3. Click **Add Sites to Company** button to open a popup window, then select one or more sites to add to your company.
4. Click **Done** to add the selected sites.

## Remove Site From Company

1. [Navigate to your Company Management page](#).
2. Select the *Sites* tab
3. Check the box for any site(s) to remove from your company.
4. Click **Remove Sites From Company** to delete a site(s).

Note: Removing a Site may removed assigned courses.

## Review Site-Specific Documents

As a Contractor Manager, you are responsible for downloading, printing and reviewing the site-specific documents with the employees who perform work at Waste Management sites.

### Navigate to Site-Specific Documents

From *Sites* tab:

1. [Navigate to your Company Management page.](#)
2. Click the **Sites** tab.
3. Click the link in the *Site Files* column to display links to the site-specific documents.

From a user:

1. [Navigate to your Company Management page.](#)
2. Navigate to a user.
3. Click on the **Sites** tab.
4. Click the link in the *Site Files* column

From a course session:

After you've added or removed attendees, the portal will provide a current the list of site-specific documents and the employees who you need to review with and provide those documents.

1. [Create new course session.](#)
2. Navigate to Site-Specific documents.

### Review Site-Specific Documents

The review process is required for each site as the documents may vary between sites.

1. Click **Download** to save Site-Specific documents to your computer.
2. Print out and review the Site-Specific documents with the employee(s).

## View Company Course Status

You can view the course status, completion dates, and expiration dates for all your users in a single page by accessing your company's Course Status page.

### Navigate to Company Course Status

1. [Navigate to your Company Management page.](#)
2. Click the **Course Status** button.

### Using the Company Course Status

The Course Status page includes a search box and filters to assist you in understanding the status of your employee's course status.

- Search box - Type a user's name or portion of their name. Select a user from the drop-down list that appears.



- Filters - Click the filter boxes to filter the course status list by:
  - User
  - Course
  - Course Status

Click **Apply** to ensure the course status results are filtered by your selection(s).

## Print ID Cards

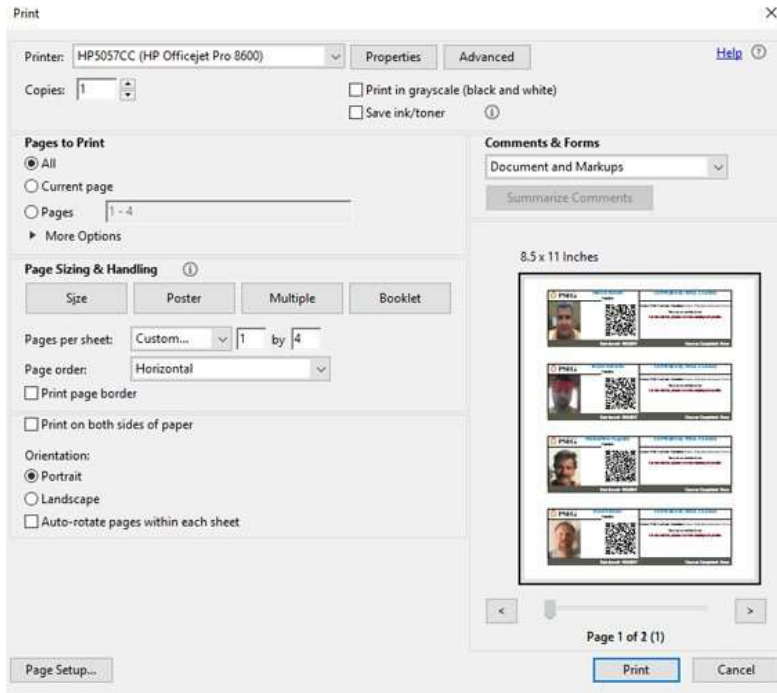
### Print Single ID Card

1. [Navigate to your Company Management page.](#)
2. Click the **Users** tab.
3. Click a user's name to navigate to their *User Management* page.
4. Click the **ID Card** button to download the ID card for the user.
5. Print the user ID card PDF, cut out the ID card, and insert into a laminated sleeve. (Use Avery 5397 laminated sleeves or similar for a card 2 1/4" x 3 1/2" size.)
6. Instruct your employees to **bring ID card to Waste Management site** as it will be required to gain site access.

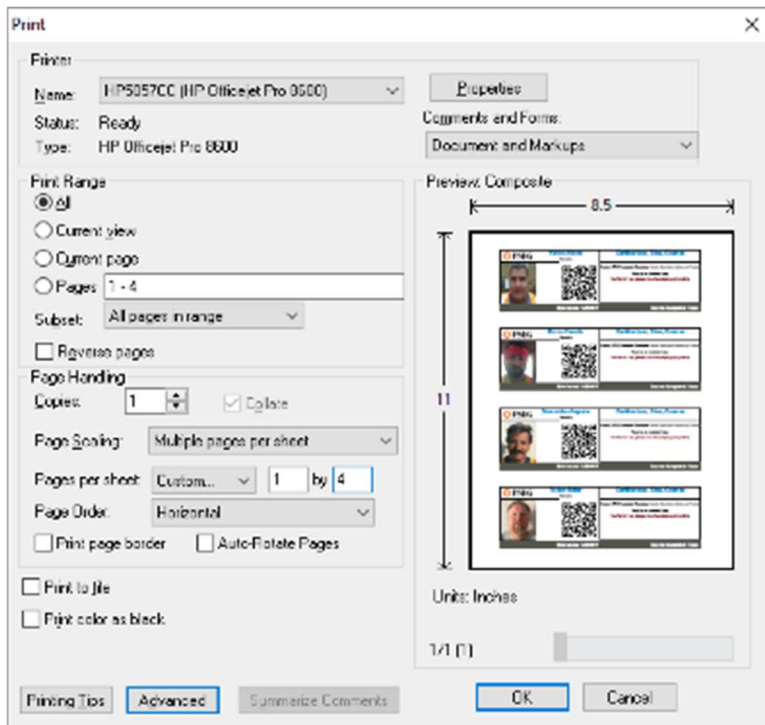
### Print Multiple ID Card

1. [Navigate to your Company Management page.](#)
2. Click the **Users** tab.
3. Click **Generate ID Cards**.
4. Use the "Start Date" and "End Date" fields to narrow down your list of users by when they were added.
5. Check each user you wish to print.
6. Click **Generate ID Cards**.
7. The system will generate a PDF version of each user's ID cards.
8. Print the user ID card PDF, cut out the ID card, and insert into a laminated sleeve. (Use Avery 5397 laminated sleeves or similar for a card 2 1/4" x 3 1/2" size.)
9. Instruct your employees to **bring ID card to Waste Management site** as it will be required to gain site access.

**Please Note:** For the most predictable printing experience, we recommend Adobe Reader for printing multiple ID Cards. Depending on the browser you use, you may need to save the PDF file (containing multiple ID cards) to your computer, open the PDF file using Adobe Reader, then carefully follow the instructions below.



1. Click the **Print** button or hit **CTRL+P** (Windows) or **Command+P** (Mac).
2. Make sure the page orientation is set to **Portrait**.
3. Click **Multiple** under **Page Sizing & Handling**.
4. Set **Pages per sheet** to **Custom** and enter: **1** by **4**.
5. Print the ID Card PDF, cut out the ID Cards and insert into a laminated sleeve.



1. Click the **Print** button or hit **CTRL+P** (Windows) or **Command+P** (Mac).
2. Make sure the page orientation is set to **Portrait**.
3. Set **Page Scaling** to **Multiple pages per sheet**.
4. Set **Pages per sheet** to **Custom** and enter: **1** by **4**.
5. Print the ID Card PDF, cut out the ID Cards and insert into a laminated sleeve.

# Manage Users

## Navigate to Users

1. [Navigate to your Company Management page.](#)
2. Click the *Users* tab.

*Note: Use the filters to narrow down the list of users.*

## Add Users

1. [Navigate to your Users.](#)
2. Click **Add Users**.
3. Add users you plan to send to Waste Management sites by complete each tab: Account, Profile, and Sites. (Mandatory fields are highlighted in red.)
4. Be sure the **record each user's username and password combination** as you will need to provide them this information to log into the WM Safety Portal system.

## Import Users


1. [Navigate to your Users.](#)
2. Click **Import Users**.
3. Click **Select Import File**, then find the appropriate document on your computer. *Note: The document must be an Microsoft Excel file.*
4. After you upload the Excel file, you will see "Processing" messages under the status.

*Note: "Processing" indicates that your file has been received and user accounts are being created for the employees in the file. The process may take some time, depending on the file size. You can leave this page and continue using the WM Safety Portal system. You will receive an email notification when processing is complete.*

## Edit User

1. [Navigate to your Users.](#)
2. Use filters to narrow the users list by using the options at the top of the page.
3. Click **View** for the user to edit.
4. Edit desired fields.
5. Click **Update User** to save.

## Add Site to User

1. [Navigate to your Users](#).
2. Select a user from the “Choose a user” list on the top of the page.
  - o *Note: Filter the User list by using the options at the top of the page.*
3. Click **View** for the user to edit.
4. Navigate to the *Sites* tab.
5. Click the **Add Sites to User** button.
6. Highlight the sites on the left to be added to the user.
7. Click  to add the highlighted sites to the user's site list.
8. Click **Done**.

## Remove Site From User

1. [Navigate to your Users](#) and select a user.
2. Click the *Sites* tab.
3. Check the box for each site to remove.
4. Click the **Remove Sites from User** button.
5. Click **OK** to confirm site deletion.

## Upload User Photo

1. [Navigate to your Users](#) and select a user.
2. Click the *Profile* tab.
3. Click **Upload Photo**.
4. Click **Select Image**, then find the appropriate image on your computer. Use the slider to resize and drag the image with your mouse to change its placement.
5. Click **Crop** once the image is correctly positioned and sized.
6. Click **Save**.

## View User Course Status

1. [Navigate to your Users](#) and select a user
2. Click the **Course Status** button to view Course

The Course Status page lists the course(s) that have been assigned to the selected user along with courses which the user has viewed or is in the process of viewing. The current progress of each course is displayed to the right of the course name.

There are three tabs organizing the assigned courses:

- **Assigned** - Courses that have not been started.
- **In Progress** - Courses that have not been completed.

- **Completed** - Courses that have been completed.

## Remove User

1. [Navigate to your Users](#) and select a user
2. Click the **Account** tab.
3. Click **Remove Account**.
4. Select the account status from the dropdown menu and provide a reason for selected status.
  1. Enter a termination date if "Termination" status is selected.
5. Click **Remove User** and confirm removal by clicking **OK**.

## Restore User

1. [Navigate to your Users](#) and select a user
2. Click the **Account** tab.
3. Click **Restore User**.
4. Enter a reason and/or comments for restoring user account.
  1. Modify username and/or email address if required.
5. Click **Restore User**.

# Courses

## Courses Overview

Course content can be completed in two different modes. One or both modes are available depending on the configuration.

1. **Individual Mode** - User can take a course individually on a computer or mobile device.
2. **Classroom Mode** - Manager can conduct a course for multiple users at a time.

### Email Notifications

You will automatically receive an email reminder **only** if an employee:

1. Has to take required training for the first time.
2. Is within 30 days of having to re-take required training.
3. Is past due to take required training.

## My Courses

**My Courses** list of the course(s) that have been assigned to you, along with courses which you have viewed or are in the process of viewing. The current progress of each course is displayed to the right of the course name.

There are three tabs organizing your assigned courses:

- **Assigned** - Courses that have not been started.
- **In Progress** - Courses that have not been completed.
- **Completed** - Courses that have been completed.

### Navigate to a Course Using My Courses

1. Click **My Courses**.
2. Click the course name.

## Course Search

Course search allows you to search for courses to which you have access. A search field along with a filter with several options is available to assist in narrowing down the list of courses.

### Navigate to a Course Using Course Search

1. Navigate to **Course Search**.
2. Use filters or search field to help locate course.
3. Find the course you wish to view.
4. Click the course name.

## Individual Mode

### View Course Content

Courses consist of one or more modules, containing one or more sections which contain media. All sections of all modules must be viewed to complete the course.

1. Navigate to a course.
2. Click **Begin/Continue**.
3. View course content.
4. Click **Continue**.

*Note: Continue button may not display until all of the section media has been viewed*

### Take Quiz

After viewing a course, module or section, you may be asked to complete a quiz. Multiple quizzes may be presented while viewing a course.

1. Complete all quiz questions.
2. Click **Continue**.

### Complete the Evaluation

After completing a course, you may be asked to complete an evaluation.

1. Complete the evaluation.
2. Click **Continue**.

## Classroom Mode

### Classroom Mode Overview

Classroom Mode allows a facilitator/instructor to lead a group of attendees through a course. Your level of system access will determine whether you have the ability to be a facilitator/instructor.

### Course Session List



The Session List page displays an overview of each session for a particular course. Existing course sessions are available to review or finalize. Based on session configuration, some or all of the following items will be visible in the Session List.

- Session - Unique number automatically generated at the time a new session is created.
- Modified - The user who last modified the session with the time and date of the modification.
- Mode - Online or offline.
- Attendees - Number of individuals who participated in course session.
- Requirements
  - Progress (online mode only)
  - Session Name (optional)
  - Location (optional)
  - Start Date (optional)
  - End Date (optional)
  - Sign-In Sheets (optional)
  - Attachments (optional)

*Note: Depending on your course configuration, all or some of the six course parts may be active and appear in the requirements column in the session list.*

- Finalized - Indicates “Yes” when the course session is finalized. Information will include the time and date the session was finalized. Indicates "No" if the course session has requirements which have not been completed.

### *Navigate to Course Session List*

1. Navigate to a course.
2. Click **Classroom Mode**.

**i** Below are links to the course-specific documents/files for this course:

1. [Handout.pdf](#)
2. [Presentation.pptx](#)

**NEW ONLINE SESSION**

**NEW OFFLINE SESSION**

SESSION	MODIFIED	MODE	ATTENDEES	REQUIREMENTS	FINALIZED	
325	07/19/2018 05:01 PM by Larkin, Dan	ONLINE	2	Progress: 100%, Session Name: KMC Test Session 6, Location: my office, Start Date: 07/18/2018 12:00 AM, End Date: 07/18/2018 12:00 AM, Sign-In Sheets: 1, Attachments: 1	7/19/2018 5:01:36 PM	View
324	07/19/2018 01:32 PM by Larkin, Dan	ONLINE	1	Progress: 100%, Session Name: KMC Test Session 1, Location: Here, Start Date: 07/18/2018 12:00 AM, End Date: 07/18/2018 12:00 AM, Sign-In Sheets: 1, Attachments: 1	7/19/2018 4:16:49 PM	View
306	07/13/2018 03:55 PM by Larkin, Dan	OFFLINE	0	Session Name: Unknown, Start Date: Unknown, End Date: Unknown, Sign-In Sheets: 0	NO	View
232	07/13/2018 03:48 PM by Larkin, Dan	ONLINE	3	Progress: 50%, Session Name: Unknown, Start Date: Unknown, End Date: Unknown, Sign-In Sheets: 0	NO	View
227	05/17/2018 05:10 PM by Larkin, Dan	OFFLINE	5	Session Name: A, Location: B, Start Date: 05/23/2018 12:00 PM, End Date: 05/23/2018 02:00 PM, Sign-In Sheets: 1, Attachments: 1	5/17/2018 5:12:53 PM	View
223	05/16/2018 06:24 PM by Larkin, Dan	ONLINE	0	Progress: 50%, Session Name: Unknown, Start Date: Unknown, End Date: Unknown, Sign-In Sheets: 0	NO	View
210	05/15/2018 04:16 PM by Larkin, Dan	ONLINE	1	Progress: 100%, Session Name: KMC Test Session 2, Location: 399 Arcola Rd, Collegeville, Start Date: 05/01/2018 10:00 AM, End Date: 05/01/2018 02:00 PM, Sign-In Sheets: 1, Attachments: 1	5/15/2018 4:18:09 PM	View
206	05/09/2018 12:26 PM by Larkin, Dan	ONLINE	2	Progress: 0%, Session Name: Unknown, Start Date: Unknown, End Date: Unknown, Sign-In Sheets: 1	NO	View
204	05/15/2018 03:55 PM by Larkin, Dan	ONLINE	0	Progress: 100%, Session Name: Unknown, Start Date: Unknown, End Date: Unknown, Sign-In Sheets: 0	NO	View
179	05/16/2018 02:13 PM by Larkin, Dan	ONLINE	0	Progress: 50%, Session Name: Unknown, Start Date: 05/04/2018 11:00 AM, End Date: 05/04/2018 12:00 PM, Sign-In Sheets: 0	NO	View

Page size: 10

40 items in 4 pages

### View Course Documents

If there are course-specific documents and files associated with a course, there is a link to them in the Session List.

1. Navigate to the Session List for a course.
2. Click the document title to view.

### Course Session Type

There are two classroom mode types available for conducting a course session.

- **Online** - Course content is delivered *inside* WM Safety Portal.

- **Offline** - Course content is delivered *outside* WM Safety Portal.

*Note: One or both types are available depending on the course configuration.*

## Create Course Session

### Create a New Online Session

1. Navigate to the Session List for a course.
2. Click **New Online Session**.

### Create a New Offline Session

1. Navigate to the Session List for a course.
2. Click **New Offline Session**.

## View Existing Course Session

View existing course sessions that are finalized or in-progress.

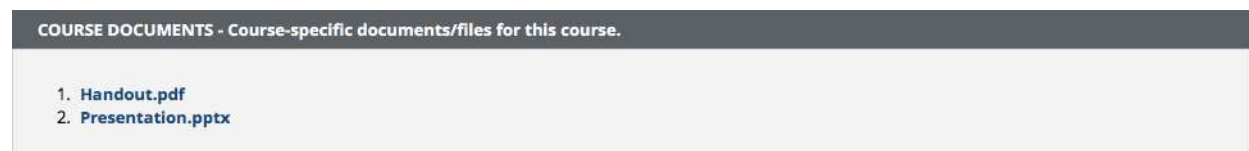
1. Navigate to the Course Session List for a course.
2. Find the course session you wish to view.
3. Click **View**.

## Course Documents

Documents can be attached to a course and are available at the top of the Course Session list page and at the top of the Course Session page. Attached documents will typically include course-related materials such as a course facilitator's guide or coursehandouts.

### View Course Documents From Course Session

1. Navigate to a course.
2. Click **Classroom Mode** to present the Session List.
3. View an existing session or create a new session.
4. Click document titles to view course documents.



The screenshot shows a dark grey header bar with the text "COURSE DOCUMENTS - Course-specific documents/files for this course." Below this is a light grey box containing a numbered list of two documents: "1. Handout.pdf" and "2. Presentation.pptx".

## Requirements

Requirements indicate the steps necessary to finalize a session. The Requirement icons appear greyed out when incomplete, and change to green to indicate that a requirement is complete. All requirements must be completed, and their respective icons must be green to finalize the session.

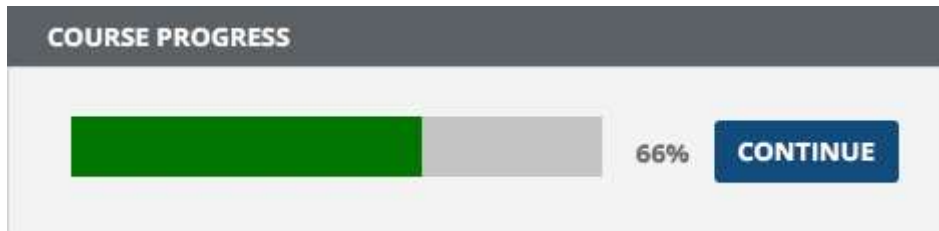
Requirements include the following items:

- Add Attendees
- Complete Course
- Upload Sign-In Sheet
- Finalize Session



### Course Progress

The course progress bar indicates the completion status of the session. This is only available for online course sessions.



Click **Begin Course** to start viewing the course. If you have already started a course, you will have the option to **Continue**.

### Previously Viewed Sections

You can review previously-viewed sections of a course by using the dropdown menu to select a course module and clicking **View**. The course will jump to the selected module and continue through the course sequentially. To return to where you last left off, click **Back to Session**. Once you are on the course session screen, click **Continue** in the course progress section to continue the course where you last left off.



## Attendees

The Attendees list indicates the individuals who are participating in the session, along with a field to enter each attendee's completion date.

### Add Attendees

1. Click the **Add Attendees** button
2. Filter the list of your employees by site selecting an option from the dropdown menu.
3. Click **Get Users**.
4. Click in the box next to each user participating in the course session.

*Note: Click **Check All** to select every available user in the list.*

5. Click **Add Selected Attendees**.

The status column in the Add Attendees will indicate the course completion status for each user.

Status	Description
Not Started	User has no record of completed the course.
<b>In-Progress</b>	User is in-progress for the course.
<b>Complete</b>	User has completed the course and <u>is more than 30 days away</u> needing to retake the course. Note: Users who have the status of "complete" can only be added if the course retake configuration setting is enabled.
<b>Expiring</b>	User has completed the course but <u>is within 30 days of needing</u> to retake the course. Only applies to courses that require users to retake.
<b>Expired</b>	User has completed the course in the past but is <u>past</u> the retake date for the course. Only applies to courses that require users to retake.

### Enter Completion Dates

Completion dates indicate the time and date the attendee concluded their course session. There are three ways to enter completion dates for your attendees listed below:

1. Individual
  1. In the field to the right of the attendee's name, enter a time and date the attendee completed the course session.
2. Group
  1. In the field at the top of the list, enter a time and date the attendees completed the course session.
  2. Click **Update Blank Dates** to apply the entered time and date to all attendees with blank completion dates.
3. Finalize
  1. If there are attendees with blank completion dates when you are finalizing the course session, those attendees' completion dates will be set to the date and time that you click **Finalize**.

### *Remove Attendee*

1. Click in the box next to the attendee's name to select that user for removal.
2. Click **Remove Attendees** to delete selected attendees.

### *Sign-In Sheets*

From the attendees list, sign-in sheets can be generated, downloaded, and printed to easily capture attendee signatures. Once a sign-in sheet has been filled-out it can be scanned, uploaded and verified within the system.

### *Download Sign-In Sheet*

A downloaded sign-in sheet may contain each attendee's employee ID, name and columns for signature, date, and time.

1. In the Attendees section, click Download Sign-In Sheet.
2. Locate your downloads folder.
3. Print out sign-in sheet.

### *Upload Sign-In Sheet*

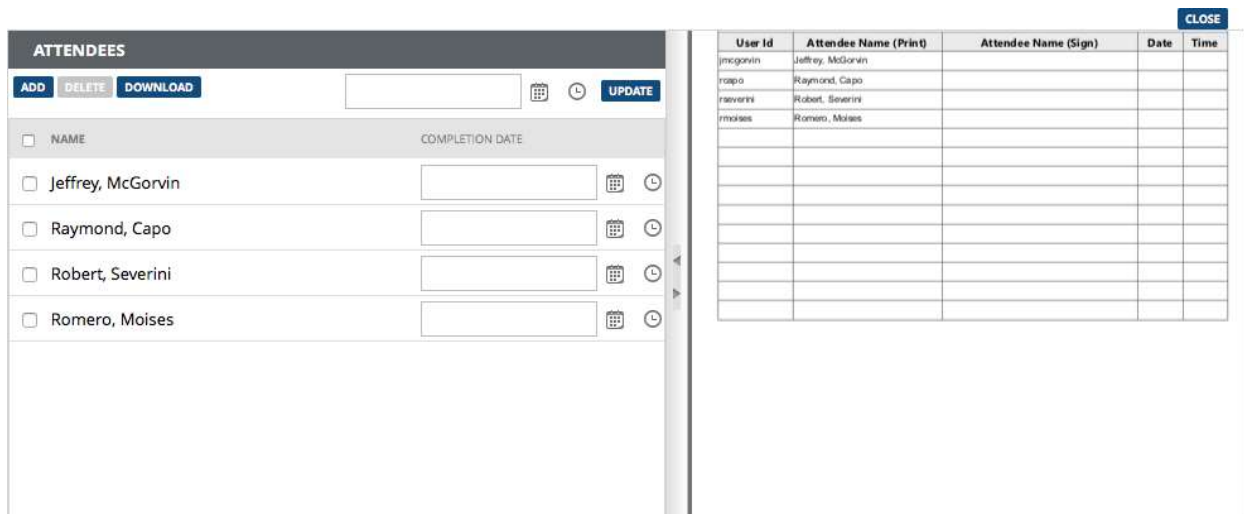
1. Click **Upload Sign-In Sheet**.
2. Find the sign-in sheet on your computer.
3. Select the file.



### Verify Sign-In Sheet

Once a sign-in sheet is uploaded to the course session, you may be required to verify the sign-in sheet to ensure you have signatures and completion dates for all attendees. Selecting **Verify** will display the course session attendee list you created in the system and the uploaded sign-in sheet, side-by-side.

1. Click the **Verify** button to view the course session attendee list and the uploaded sign-in sheet side-by-side.
2. Using the uploaded sign-in sheet as a reference, ensure the course session attendee list names and completion dates match.
3. Make any necessary adjustments so the course session attendee list names and completion dates match those on the sign-in sheet.
4. Click **Close** to dismiss the side-by-side view.



### Remove Sign-In Sheet

1. Click **Remove** next to the file name.

## Review Site-Specific Documents

As a Contractor Manager, you are responsible for downloading, printing and reviewing the site-specific documents with the employees who perform work at Waste Management sites.

### *Navigate to Site-Specific Documents*

From *Sites* tab:

1. [Navigate to your Company Management page.](#)
2. Click the **Sites** tab.
3. Click the link in the *Site Files* column to display links to the site-specific documents.

From a user:

1. [Navigate to your Company Management page.](#)
2. Navigate to a user.
3. Click on the **Sites** tab.
4. Click the link in the *Site Files* column

From a course session:

After you've added or removed attendees, the portal will provide a current the list of site-specific documents and the employees who you need to review with and provide those documents.

1. [Create new course session.](#)
2. Navigate to Site-Specific documents.

### *Review Site-Specific Documents*

The review process is required for each site as the documents may vary between sites.

1. Click **Download** to save Site-Specific documents to your computer.
2. Print out and review the Site-Specific documents with the employee(s).

### Finalize Session

The **Finalize Session** button will appear gray and is disabled until all requirements for the course session are completed and their respective icons are green.

*Note: The portal will alert you if any of the attendees are missing a completion time and date and suggest an option to set any blank completion date to the time and date that you click Finalize Session.*



1. Click **Finalize** to conclude a course session.

*Note: Once you finalize a session **no further changes can be made.***

### Delete Session

Delete a course session **only** when you have created one in error. Only sessions that are in-progress can be deleted. Finalized course sessions cannot be deleted. When a session is deleted, all associated files which may have been uploaded are also deleted from the portal.

1. Click **Delete Session**.

## Confirm Course Completion

### Navigate to Course Confirmation

There are two ways to access a user's *Course Confirmation* page.

#### *Email*

As a Contractor Manager, you receive an email notification each time an employee completes a course.

1. Click the link provided in the email and login to the Portal using your username and password.
2. You will automatically be directed to the *Course Confirmation* page.

#### *Direct*

If you are unable to locate the email notification or you want to perform the confirmation process for multiple courses and/or employees.

1. Navigate to your *Company Management* page.
2. Click the **Course Status** button.
3. Filter the page by user, course, and/or course status.
4. Click the course name for a course that has a status of *Awaiting Confirmation*.

### Confirm Course Completion

1. Click the **Confirm Completion** button to open the pop-up window.
2. If you have not already reviewed Site-Specific documents:
  1. Click **Download** to save Site-Specific documents to your computer.
  2. Print out and review the Site-Specific documents with the employee(s).
3. Click the **Confirm** button in the pop-up window to confirm employee's:

- Receipt of Site-Specific documents
- Course completion

Note: All of the current required courses must be retaken on a yearly basis. The “Valid Thru” or expiration date of each course is shown on your company’s Course Status page.