

NCDOL OSH Consultative Services

New Employee / Cut Loose Checklist & Tracking Log

Name of New Hire: _____ **Start date with CSB:** _____

This document lists items needed for a consultant to be cut loose to perform independent visits. The district supervisor will verify all applicable tasks are satisfactorily completed. The length of time needed will vary depending upon the consultant's OSH experience.

Date/ Initials	<u>TRAINING REQUIREMENTS</u>	<u>RESPONSIBLE PERSON</u>
	Within First Few Days	
	New Employee Orientation (if new to the Department)	Supervisor/HR
	Tour the building, supply, storage, restrooms, stairwells, elevator, water fountain, break room, etc.	Supervisor/ co-workers
	Emergency Evacuation/Shelter in Place Procedures	Supervisor/ Floor Monitors/ Administrative Assistant
	Introduce new employee to coworkers, floor monitors, other bureaus in the building, etc.	Supervisor/ co-workers
	CSB Unit Safety & Health Policies & Procedures	Employee/Supervisor/ S&H Committee Chair, Coordinator
	Office equipment/Telephone Training	Supervisor/ Administrative Assistant
	OSHR Position Description Form	Supervisor/HR
	Weekly time entry (Beacon/Fiori); Calendar sharing; Holiday, community service, sick and vacation leave	Supervisor / calendar share with supervisor, BC & co-workers
	Credentials/ID Card – Photo & Building Access	Administrative Assistant
	Parking space (if downtown Raleigh)	Administrative Assistant/ NCDOL Parking Coordinator
	Business Cards	Administrative Assistant
	Office keys	Administrative Assistant/ Bureau Chief
	Notify IT Group of Change (building and group email lists, OTI, intranet employee directory update, ensure F: drive access to consultation) OE consultant address for reports Add contact info to CSB staff employee contact list	Administrative Assistant/ Supervisor
	CSHO ID assignment or transfer from compliance	Administrative Assistant
	Laptop, Tablet; Printer; other Office Equipment & Supplies; Planner/Calendar; Field Equipment; PPE; & logo clothing	Administrative Assistant/ Supervisor
	OSHA Express notebook	Supervisor/ Admin
	US OSHA Computer Security	Administrative Assistant
	Wifi Access or Hot Spot	Bureau Chief
	Signature to e-signature for reports	Supervisor/ Consultants
	General bureau & departmental info such as ERC fundraising events, annual training & banquet	Supervisor/ Administrative Staff
	General Policy & Procedure	

	Inventory requirements (Physical fixed asset from FSD in April/May, and annual requirements for telework in July/August) and Equipment requests	Supervisor/ Administrative Assistant
	Car Reservations, Motor Fleet Policy, Vehicle Inspections, Accident Reporting & Follow-up, Excessive Speed Policy, and telematics.	Supervisor/ Administrative Assistant / Bureau Chief
	NCDOL Travel Policy & Procedure	Supervisor/ Administrative Assistant/ Bureau Chief
	Annual work physical – April-May	Administrative Assistant
	Miscellaneous Admin. Paperwork	Supervisor/ Administrative Assistant
	Consultant Activity Policy & Procedure	
	Accurate & timely completion of Monthly reports, policy & instruction (time distribution, OE weekly time entries, expense report and private car mileage, blanket DOLB-8, individual DOLB-8 needs, receipts; and travel car log (once released if assigned state motor vehicle).	Employee/ Supervisor
	Work Plan/Education & Training Plan/NCVIP	Supervisor
	Review F: drive documents, GS Targeting Access for lapse time reports and deferrals	Supervisor
	Review location of CSB policies & procedures on One Stop Shop & Public website	Supervisor
	Consultant review/understanding of the CPPM and Bureau Operating Procedures, Forms	Employee/ Supervisor
	SEP Committees, bureau goals	Supervisor/ Bureau Chief
	Initial Course Training Requirements	
	Training record submission	Supervisor/ to ETTA Training Coordinator
	#100 – Initial Compliance Course	Employee/ Supervisor
	Technical Writing/OSHA Express	Employee/ Supervisor
	Career Path – Safety: #105 – Introduction to Safety Standards for Safety Officers; OR Health: #125 – Introduction to Health Standards for Industrial Hygienists	Employee/ Supervisor
	Consultation Specific Required Training:	
	OSHA TI 1500 Course Enrollment/Travel	Administrative Assistant/ Employee
	Additional Training Courses:	
	Optional or post release #141 Inspection Techniques and Legal Aspects; IS-100- Introduction to the Incident Command System; IS-700 – National Incident Management System (NIMS), an Introduction. PSM, PQV, Combustible Dust	Employee/ Supervisor
	On The Job Training	
	Provide employee OJT & visit tracking log/spreadsheet	Supervisor
	Properly use & maintain equipment	Supervisor/ Consultant mentors
	OE visit/request entries, OSHA 300 data entry, entering interventions, running reports, routing requests, weekly time entries, etc.	Employee/ Supervisor/ Consultant mentors
	Case File/OE file Management/ managing queue folders	Supervisor
	Review Casefile & Report guidelines and Instructions	Supervisor/ Consultant mentors

	Form 33 Training, guidance & resource documents	Supervisor/ 1500 course/ consultant mentors OJT
	SHARP Training – review all SHARP operating procedures and relevant CPPM chapters; SHARP log on F:drive; employer annual review paperwork review; managing expirations and requests for renewals; SHARP approval paperwork (with DART/TRC calculations); SHARP event worksheet & communication with employer & Commissioner’s Office	Supervisor/ Employee/ Consultant mentors
	Local Surveys with other Consultants – conduct opening, closing, full visit, schedule surveys, coordinate with other discipline. Take part in SHARP visits, construction, general industry, public sector, SEP visits, visits with sampling and noise dosimetry (if health consultant trainee), visits with both disciplines, and across districts if available. As opportunity allows, go on training and education visits, follow-up visits, interventions, and technical visits such as PSM, and combustible dust, and other visit types such as the “enhanced consultative construction program”. The exact number of surveys will vary depending upon the consultant’s OSH experience.	Employee/ Consultant mentors
	Report writing & casefile management – follow casefile & report instructions, write the full report, write hazards, evaluate, and enter abatements, abatement extensions, enter Form 33 attribute ratings and comments, enter communication log, tiff documents, withdraw requests, route visits and requests, manage lapse time	Employee/ Consultant mentors/ Supervisor
	Discuss speaking events, events & booth attendance, attending conferences, promoting Consultative services	Supervisor/ Consultant mentors
	Attend bureau, district, SEP committee, consultant discipline specific meetings	Employee/ Supervisor
	Post release	
	If teleworking: Telework package (policy agreement, inventory withhold wage form, home office safety attestation, photo, home office visit)	Supervisor
	Motor Fleet Policy, travel log procedures	Supervisor
	OJE visit requirements	Supervisor

Date Consultant Released: _____

Consultant’s Signature: _____ **Date:** _____

Supervisor’s Signature: _____ **Date:** _____

Bureau Chief’s Signature: _____ **Date:** _____