

## Record Retention

*This Tip Sheet addresses the record retention requirements for your OSHA 10- and 30-hour class.*

- Maintaining the required records and documentation is integral to success as an outreach trainer.
- You are required to keep your 10- and 30-Hour class documentation for **five years**
- Your Authorizing Training Organization (ATO) reserves the right to request copies of your class records for verification purposes at any time.
- You**, individually, as an Outreach Trainer, are responsible for maintaining your records.
- Make sure that you have access to the documents should you leave your place of employment. If you are requested to send copies of your records to your ATO, you will be notified in writing with information on
  - what is being requested, and
  - how and when to submit.
- If you fail to keep the required documentation it may result in corrective action, up to and including the revocation of your OSHA Outreach Training Program Authorized Trainer Status.

Make sure you have access of your training records/documents in case you change employers.

## Record Retention Checklist



### Daily Sign-In Sheets

- Separate sign-in sheet(s) for each day.
  - **Helpful Hint:** 100% attendance is **REQUIRED**. Consider adding on your sign-in-sheet "It will be noted if you arrive late or leave early."
- Printed or typed names must appear next to the student's signature
  - Helpful Hint:** If printed names are hand-written, confirm spelling before class is over!
- Must contain the course name (e.g., OSHA 10-hour General Industry), date, and times of the course sessions.
- Location of the training, city and state
- Primary/Assistant Outreach trainer(s) first and last names and signature



### Student Contact Information

- Name and address of where you will send their OSHA card. Remember it must be the student's home or business.
  - Helpful Hint:** Have each student address their own mailing envelope! Less chance of the information being wrong!



### Detailed Topic Outline & Trainer Information

- Course title, location, and the actual time spent on every topic being covered.
  - It must include breaks and mealtimes.
  - **Remember:** You can only train for 7.5 hours, not including administrative procedures, breaks, and mealtimes. A class day cannot exceed 10 hours.
- If using guest/Assistant Outreach trainers, indicate the time and topic(s) each guest trainer covered.

- Maintain a list of each Assistant Outreach Trainer participating in the class, including name, specific topics covered, allotted time, and copy of any additional Authorized Trainer's valid card.

*What are "Qualifications?" Qualifications can be a résumé, previous years of experience, a competent person credential, etc. The definition of qualification is up to the trainer, but be prepared to explain it.*

- Maintain a list of each guest trainer, specific topics they covered, allotted time, and their qualifications.
- Copies of any handouts (one or each topic), assessments (with documented answers).
- **Helpful Hint:** Be sure you know the run-time of any videos, the title of the video, and the topic.

### Course Completion Cards



- Prior to distributing the cards to the students, make a copy of the front and back of each student's card and keep it with your class records.
- If students self-addressed the envelope for mailing their card, make a copy first before you send it!

### OSHA Outreach Training Program Report (OTPR)



- The official OTPR report is generated from within the [GT OTIEC portal](#) where you report your class and request your student cards. You must download and maintain this official OTPR with your class records.

*Upload your course documentation (agenda, sign-in sheets, student contact information, etc.) to the portal when you create your course report. Let the portal serve as your back-up for your course files!*

*Keep records of each guest instructor including name, specific topic(s) covered, time for each presentation, and a copy of their Authorized Trainer card (if applicable).*

### More Helpful Hints/Reminders



- Enclose a "note" asking the student to notify you when they receive their card. Give them 7-10 days to contact you. If you have not heard from them within that time, you are encouraged to contact them. Additionally, enclose a reminder of how they can contact you, their Outreach Trainer, should they need to replace their card, and also provide the contact information for your ATO.

*OSHA 10- and 30-hour cards do NOT expire. However, they can only be replaced ONCE, and only within 5 years of their issue date.*

- Remember the card can only be replaced once in a 5-year period – encourage your classes to make a copy of their card for safe-keeping and ease of replacement. After five years from the course end date, you can purge your files. Unfortunately, if someone misplaces their card after five years, they will have to retake a 10- or 30-hour class.

*Even if you retire, or decide not to conduct Outreach Training classes any longer, you are still responsible for maintaining your class records for 5 years after the class date. Make a back-up plan!*

- Use a different color folder for each year. It is easier to find each year's files when it's time to purge the files.

