

Action Plan Proposal & Delivery

INSTRUCTIONAL GUIDELINE

ACTION PLAN HOW-TO RESOURCES

Action Plan Audit Software Resource

Online Action Plan Proposal & Delivery Processes

The Action Plan Proposal & Delivery Instructional Guideline provides guidance on Energy Safety Canada (ESC)'s new Online Action Plan Proposal & Delivery Processes for the employer or designated auditor to complete.

The employer or designated auditor will log in through their ESC account to access the Auditor Portal and complete the new online Action Plan Proposal process. Once complete, it is submitted to ESC for QA (QA). After the proposal has been approved, the delivery stage will be available to complete the action plan. After the Delivery Stage is complete, it is re-submitted to Energy Safety Canada for final QA review.

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Completing the Action Plan Proposal

1. Log in to your My Energy Safety Canada account.
2. Click the **My Account** button.
3. Under the **Auditor Portal** dropdown menu, select **Action Plan Dashboard**.



Action Plan Dashboard

Under **Action Plans in Progress**, click **Go to Audit**.

Action Plan Dashboard

Welcome to the Auditor Portal. Here you will find tools to help you manage your interactions with Energy Safety Canada. There are tools for your company's representative for COR to manage your safety audits and for Energy Safety Canada auditors. If you cannot access the tools you are looking for, you may need to update your profile. Please contact us at CORInfo@EnergySafetyCanada.com

Action Plans In Progress

Company	Audit #	Status	
A Safe Petroleum - TestCo	202401406	Proposal	Action Plan Report Go To Audit

My Completed Action Plans

Company	Audit #	Start Date	Status
There are no records.			

Company Information Page

This page includes the main company's address, the employer (COR) contact name and email address, and the company profile from the Registration phase.

Click **Next** to review the Action Plan Guidance Pages.

ACTION PLAN GUIDANCE

Under the **Action Plan Guidance** tab, there are six steps and a scoring guide that provide detailed instructions on how to build out each objective and milestone in your Action Plan Submission. A printable PDF version can be found on the [Energy Safety Canada website](#).

Action Plan Tool

SUMMARY PAGE

1. Click **Action Plan Tool**. You will be brought to the Summary Page.
2. The Summary page lists five objectives.
3. Click **Objective 1** to begin entering your objectives.

Assessor	Cert Type
Bernice Bogisich - Test	COR

Objective	Review Objective	Review Milestones
Objective 1		
Objective 2		
Objective 3		
Objective 4		
Objective 5		

OBJECTIVES

1. Input your objectives. If your objectives were based on a recommendation from a previous audit, check the box.
2. Click **Save**. A green checkmark will appear to confirm your entries are saved.

Objective 1

Milestone 1

Milestone 2

Objective 2

Objective 3

Objective 4

Objective 5

Add Objective

Save

Objective 1*

The JHSC Chair and Co-Chair did not meet the training requirements. This objective will focus on ensuring they receive the required training based on Alberta and SK legislation.

3823 characters left

This objective was based on a recommendation from a previous audit

MILESTONES

1. After entering your objective, add your milestones.
2. Include the responsible party, target date, points assigned and proposed deliverables.
3. Click **Save**.

Milestone 1

Milestone 2

Objective 2

Objective 3

Objective 4

Objective 5

Add Objective

Save

Mark for follow up

Objective 1

Total: 3

Total: 0

Total: 0

Points Assigned*

Self Score

ESC QA Points

3

0

0

Milestone 1*

Revise the Training Matrix to include the new JHSC Chair and Co-Chair training requirements for AB & SK.

3896 characters left

Responsibility (Individual or group assigned)*

H&S Manager

Target Date*

5/7/2025

Completion Date

MM/DD/YYYY

MM/DD/YYYY

Proposed Deliverables *

Previous and updated training matrices.

3961 characters left

To submit, you must complete at least **two milestones** for each of the five objectives and all required fields.

ADDING/DELETING ADDITIONAL OBJECTIVES OR MILESTONES

1. If you have more than five objectives to add, click **Add Objective**.
2. If you have more than two milestones to add, click the **plus sign (+)**.
3. If you need to remove an added milestone or objective, click **Delete Milestone** or **Delete Objective**.

Objective 1

Objective 2

Objective 3

Objective 4

Objective 5

Objective 6

Milestone 1

Milestone 2

Objective 6*

4000 characters left

This objective was based on a recommendation from a previous audit

Objective 1

Milestone 1

Milestone 2

Milestone 3

Objective 2

Milestone 3*

Mark for follow up

Objective 1

The JHSC Chair and Co-Chair did not meet the training requirements. This objective will focus on ensuring they receive the required training based on Alberta and SK legislation.

Total: 3

Total: 0

Total: 0

Points Assigned*

Self Score

ESC QA Points

0

0

0

Delete Milestone

Review and Submit

1. Ensure your work is saved.
2. When you have completed the Action Plan Proposal, return to the **Summary Page**.

3965 characters left

Add Objective

Responsibility (individual or group assigned)*
sdfasdfsdfasdfsdfs

Target Date*
5/9/2025

Completion Date

MM/DD/YYYY MM/DD/YYYY

Proposed Deliverables*

sdfasdfsdfasdfsdfs

3987 characters left

< Save >

Summary Page ←

This will bring you back to the menu page.

3. Click the chevrons beside each objective to see a breakdown of the points assigned.

Objective	Review Objective	Review Milestones
Objective 1		↘
Milestone	#	Points
Milestone	1	3
Milestone	2	1
Milestone	3	5
Milestone	4	1
Objective 2		>
Objective 3		>
Objective 4		>
Objective 5		>
Objective 6		>

To download a PDF version of your submission to review before submitting:

4. Click on **Action Plan Dashboard**.

A Safe Petroleum - TestCo

Action Plan Dashboard

Audit #	Action Plan Status	Action Plan Start	Action Plan Stage	Scope
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5. Click on **Audit Report**. Depending on your internet speed, this report may take several minutes to generate.

Note: This report will always be accessible throughout the Action Plan process and after it has been completed.

Action Plan Dashboard

Welcome to the Auditor Portal. Here you will find tools to help you manage your interactions with Energy Safety Canada. There are tools for your company's representative for COR to manage your safety audits and for Energy Safety Canada auditors. If you cannot access the tools you are looking for, you may need to update your profile. Please contact us at CORInfo@EnergySafetyCanada.com

Action Plans In Progress

Company	Audit #	Status		
A Safe Petroleum - TestCo	202403104	Proposal	Action Plan Report	Go To Audit

1. Click **Go To Audit**.
2. Click the **Finalize and Submit**.
3. Confirm that the proposal stage is complete by checking the box.
4. Click **Submit**.

Denise Bogisich - Test

 **Finalize and Submit**

Action Plan Proposal - Submission

I confirm proposal stage is complete.

SUBMIT

When the Action Plan Proposal is submitted, you will be directed to the Action Plan Dashboard. **Proposal Under Review** indicates your proposal review is underway. A confirmation email will be sent to your inbox.

Action Plans In Progress

Company	Audit #	Status	Action Plan Report	Proposal Under Review
A Safe Petroleum - TestCo	202403104	ProposalSubmitted	Action Plan Report	Proposal Under Review

Action Plan Proposal Submitted - Audit # 202403104

i Retention: ESC OMS-STD-013 3 year + 6 month delete (3 years, 6 months) Expires: Wed 14-Jun-2028 11:59 AM

**E N E R G Y
S A F E T Y
C A N A D A**

Dec 17, 2024

Bernice Bogisich - Test
A Safe Petroleum - TestCo
18960 72 Ave
Surrey, BC
V4N 5M8

(604) 313-9990

Dear Bernice Bogisich - Test,

Please be advised that we have received your company's health and safety Action Plan proposal.

The quality assurance review time is 2-4 weeks.

If the proposal requires revisions, as identified by Energy Safety Canada Quality Review, it will be returned to you to complete the improvements and to resubmit through the Auditor Portal. The resubmission will then be reviewed to verify the required improvements have been completed.

Please contact us if you have any questions.

Regards,

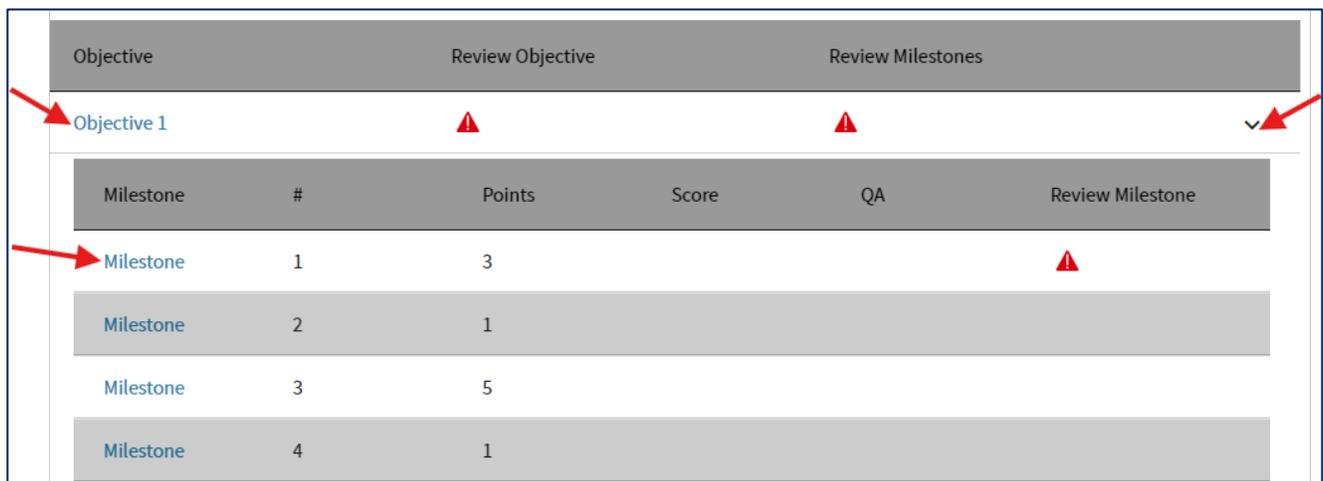
Safety Audits and Certifications
Energy Safety Canada
1 800 667 5557 Ext 3
CORInfo@EnergySafetyCanada.com

RETURNED FOR REVISION – PROPOSAL STAGE

If any issues with the Proposal are identified during the QA process, the assigned employer contact or auditor will receive an email indicating that revisions are required.

To make corrections:

1. Log in to the **Auditor Portal**.
2. Access your Action Plan through the Action Plan Dashboard.
3. Click **Action Plan Tool**. A red triangle will identify Any objectives and milestones requiring revision.
4. To view the items requiring revision, click the objective or the chevron.



Objective	Review Objective	Review Milestones			
Objective 1	⚠	⚠ ✓			
Milestone	#	Points	Score	QA	Review Milestone
Milestone	1	3			⚠
Milestone	2	1			
Milestone	3	5			
Milestone	4	1			

You will see a red **Revisions Required** box in the top right corner and the **Reviewer Note** under **Save**.

1. Follow the direction of the Reviewer Note.
2. Make your corrections as required. Click **Save** when the correction is completed.

Objective 1

Milestone 1

Milestone 2

Milestone 3

Milestone 4

Objective 2

Objective 3

Objective 4

Objective 5

Objective 6

Add Objective

Objective 1*

The JHSC Chair and Co-Chair did not meet the training requirements. This objective will focus on ensuring they receive the required training based on Alberta and SK legislation.

3823 characters left

This objective was based on a recommendation from a previous audit

Save

Reviewer Note

Please make the Objective measurable

A green checkmark and border will appear.

Objective 1

Milestone 1

Milestone 2

Milestone 3

Milestone 4

Objective 2

Objective 3

Objective 4

Objective 5

Objective 6

Add Objective

Objective 1*

The JHSC Chair and Co-Chair did not meet the training requirements. This objective will focus on ensuring they receive the required training based on Alberta and SK legislation. Successful completion of this Objective will result in 2 fully trained JHSC chairs.

3739 characters left

This objective was based on a recommendation from a previous audit

Save

Reviewer Note

Please make the Objective measurable

1. When all the corrections are made, return to the **Summary Page**.

2. Click **Finalize and Submit**.
3. Click **Submit** to resubmit the Audit.

If the QA Reviewer approves the changes, you will receive a Proposal Approval email, and the Action Plan Program Delivery Stage will open.

Action Plan Proposal Approved- Audit # 202403104

**S A F E T Y
C A N A D A**

Dec 17, 2024

Bernice Bogisich - Test
A Safe Petroleum - TestCo
18960 72 Ave
Surrey, BC
V4N 5M8

(604) 313-9990

Dear Bernice Bogisich - Test,

Your Action Plan Proposal has been reviewed and approved.

The completed Action Plan along with the deliverables must be submitted for review prior to **November 30**, of the calendar year.

Completed Action Plans must include:

- Assigned company representative who completed the Action Plan
- Description of what was done to reach each objective
- Self-score for each objective (Note: Energy Safety Canada will assign the final score)
- Sampling of supporting documents (policies, presentations, records, etc.) that support the objective

Supporting documents must be:

- Relevant to the project objective
- Clearly labelled and dated
- Representative of the calendar year that the Action Plan covers
- Representative of the provincial jurisdictions relevant to the COR

Please contact us if you have any questions.

Regards,

Action Plan Tool – AMENDMENTS

Anything approved during the Proposal stage is read-only during the Delivery Stage. If you need to make a change before the **October 31 Amendment deadline**, please call or email CORinfo@EnergySafetyCanada.com.

Action Plan Tool – DELIVERY STAGE

Action Plans are due on **November 30**.

You can access the Action Plan Tool through the Action Plan Dashboard throughout the remainder of the year until you are ready to submit.

Action Plans In Progress

Company	Audit #	Status		
A Safe Petroleum - TestCo	202403104	Delivery	Action Plan Report	Go To Audit

During the Delivery Stage, you will assign a Self Score.

1. Include the completion date and Assessor Notes.
2. Under Assessor Notes, provide details on whether the milestone was complete or incomplete. Upload your deliverable documents.
3. Click **Save**. Your total points will be updated.

Note: The Self Score cannot exceed the points assigned, and the Completion Date must be in the current year.

Objective 1
< >

- Milestone 1
- Milestone 2
- Milestone 3
- Milestone 4

Mark for follow up

Objective 1

requirements. This objective will focus on ensuring they receive the required training based on Alberta and SK legislation. Successful completion of this Objective will result in 2 fully trained JHSC chairs.

Total: 100

Points Assigned*

3

Total: 3

Self Score*

3

Total: 0

ESC QA Points

0

Milestone 1*

Revise the Training Matrix to include the new JHSC Chair and Co-Chair training requirements for AB & SK.

3896 characters left

Responsibility (Individual or group assigned)*

H&S Manager

Target Date*

5/7/2025

MM/DD/YYYY

Completion Date*

4/26/2025

MM/DD/YYYY

Proposed Deliverables *

Previous and updated training matrices.

3961 characters left

Assessor Notes *

The JHSC Chairs completed their committee training course online through Energy Safety Canada. Please see the 2 Certificates attached to verify completion.

3845 characters left

<
↻
Save
>

Browse for file

Choose Files

Tips and Tric...t Writing.pdf

Upload

1. When you are ready to submit, return to the **Summary Page**.
2. Click **Finalize and Submit**.

3. Confirm that the proposal stage is complete by checking the box.
4. Click **Submit**.

You will receive an email stating that the Action Plan has been submitted and will now undergo QA review.

Bernice Bogisich - Test

 **Finalize and Submit**

Action Plan Delivery - Submission

I confirm delivery stage is complete.

SUBMIT

Action Plan Submitted - Audit # 202403104

i Retention: ESC OMS-STD-013 3 year + 6 month delete (3 years, 6 months) Expires: Wed 14-Jun-2028 12:48 P

**E N E R G Y
S A F E T Y
C A N A D A**

Dec 17, 2024

Bernice Bogisich - Test
A Safe Petroleum - TestCo
18960 72 Ave
Surrey, BC
V4N 5M8

(604) 313-9990

Dear Bernice Bogisich - Test,

Please be advised that we have received your company's Final Action Plan submission.

If the audit requires revisions as identified by an Energy Safety Canada's Quality Assurance (QA) review, it will be returned to you for improvement. We will then review the resubmission to verify required improvements have been completed.

Energy Safety Canada will provide notification to you on the status of the Action Plan Final Submission once the QA review has been completed.

Please contact us if you have any questions.

Regards,

Safety Audits and Certifications
Energy Safety Canada
1 800 667 5557 Ext 3
CORInfo@EnergySafetyCanada.com

RETURNED FOR REVISION – DELIVERY STAGE

If QA identifies any issues with the Delivery, the Employer Contact or Auditor assigned will receive a Revisions Required email. To make corrections:

1. Log in to the Auditor Portal.
2. Access your Action Plan through the Action Plan Dashboard.
3. Click Action Plan Tool. Any objectives and milestones requiring revision will be identified with a red triangle.
4. To view the items requiring revision, click the objective or the chevron.

Objective	Review Objective	Review Milestones			
Objective 1		⚠			
Milestone	#	Points	Score	QA	Review Milestone
Milestone 1	1	1	1	1	⚠
Milestone 2	2	1	1	1	

You will see a red **Revisions Required** box in the top right corner and the **Reviewer Note** under **Save**.

1. Follow the directions of the Reviewer Note.
2. Make your corrections as required. Click **Save** when the correction is completed.

Objective 1

Milestone 1

Milestone 2

Mark for follow up

Objective 1

Total: 99

Total: 93

Total: 2

Revisions Required

< ✓ Save >

Reviewer Note
A Self Score is Required

The green checkmark will appear, and the red border will turn green.

< ✓ Save >

Reviewer Note
A Self Score is Required

Objective 1 < >
 Milestone 1 Mark for follow up Revisions Required
 Milestone 2

Objective 1 Total: 99 Total: 93 Total: 2

1. When all the corrections are made, return to the **Summary Page**.
2. Click **Finalize and Submit**.
3. Confirm your delivery stage is complete by checking the box.
4. Click **Submit**.

Finalize and Submit

Action Plan Returned Delivery - Submission

I confirm returned delivery stage is complete.

SUBMIT

Action Plan Report

If the QA Reviewer approves of the changes, you will then receive an Action Plan Final Approval email.

Action Plan Approved - Audit # 202503228



Corinfo

To: bb_asafepetro@mailinator.com

Cc: bb_asafepetro@mailinator.com

**E N E R G Y
S A F E T Y
C A N A D A**

Jan 08, 2025

Bernice Bogisich - Test
A Safe Petroleum - TestCo
18960 72 Ave
Surrey, BC
V4N 5M8

(604) 313-9990

Dear Bernice Bogisich - Test,

Thank you for participating in the Action Plan process. The company's Action Plan for this year has been successfully completed.

Please find the Final Action Plan Report and QA Summary on your Action Plan Dashboard under "My Completed Action Plans."

The Action Plan Report will provide a complete print out of your final approved Action Plan, including ESC QA Points assigned. **External Auditors must provide a copy of this report to their client.**

The final QA Summary report will display any reviewer notes identified throughout the Proposal QA and/or Delivery QA, as well as display the QA points awarded by ESC for each Objective/Milestone.

For Employers completing first year Action Plans: For employers to be considered for approval to perform an Action Plan next year, they must achieve 80% or higher on this year's Action Plan to be eligible for an Action Plan next year.

The deadline to apply for the Action Plan next year is January 31.

For Employers completing 2nd year Action Plans: A COR Certification Audit is required for the following year and should be conducted at your peak season prior to COR Expiry.

Please contact us if you have any questions.

Regards,

Safety Audits and Certifications
Energy Safety Canada
1 800 667 5557 Ext 3
CORInfo@EnergySafetyCanada.com

Note: If you have completed a 2nd year Action Plan, a Certification Audit must be completed the following year.

After the Action Plan has passed QA and you have received the email, the Action Plan Report and QA Summary will be accessible on your Action Plan Dashboard under **My Completed Action Plans**.

The Action Plan Report will provide a complete printout of your final approved Action Plan, including the ESC QA Points assigned.

Note: External Auditors completing an Action Plan on behalf of the Company are responsible for providing their client with the Final “Action Plan Report.”

Your final QA Summary report will display any reviewer notes identified throughout the Proposal QA and/or Delivery QA as well as display the QA points Awarded by ESC for each Objective/Milestone

Action Plan Dashboard

Welcome to the Auditor Portal. Here you will find tools to help you manage your interactions with Energy Safety Canada. There are tools for your company's representative for COR to manage your safety audits and for Energy Safety Canada auditors. If you cannot access the tools you are looking for, you may need to update your profile. Please contact us at CORInfo@EnergySafetyCanada.com

Action Plans In Progress

Company	Audit #	Status
There are no records.		

My Completed Action Plans

Company	Audit #	Start Date	Status	
A Safe Petroleum - TestCo	202503228	1/8/2025	Completed	Action Plan Report QA Summary

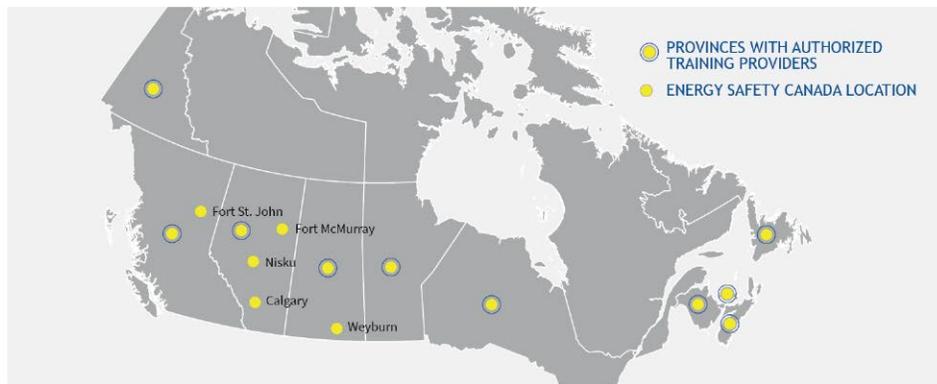
Note: The report may take a couple minutes to load.

SAFETY DOESN'T CLOCK IN AND IT DOESN'T PUNCH OUT. IT'S 24/7.

ENERGY SAFETY CANADA'S SERVICES:

- Virtual training
- Safety services
- Company consultations
- Data reports
- Certificate of Recognition

LOCATED WHERE YOU ARE:



Phone:
1 800 667 5557



Email:
Safety@Energy
SafetyCanada.com



Web:
EnergySafety
Canada.com