ATC forms and templates

Purpose: To provide examples of supporting documentation (forms and templates) for Training Organizations to keep records as per The Open Group's accreditation requirements.

How to use it: These documents become part of the Organization's Quality Management process and it is the Organization's responsibility to keep them up to date.
The Organization's Quality Management System should refer to these documents.
It is recommended to adapt them to the Organization's best practices:
- Document name and version number.
- Column titles may replace by terms more commonly used by the Organization.
- The scope of each document may be broaden to meet the Organization's needs.
Records must be kept for a minimum of 6 years.

Please take the time to study each template or form prior to using the documents.

Quarterly voucher report
The Organization must provide a quarterly statement of vouchers purchased by the Organization and its Affiliates, showing the voucher number, attendee name, country, date of course attendance, and any other particulars as the Certification Authority may reasonably require. It contains information that is required to be reported quarterly to The Open Group.

Complaint records
It should contain information related to each complaint received but also information showing that the Organization does apply continual improvement. It might be required to define what a ""complaint"" is. It might also be interesting to include feedback of ""in satisfaction"" from candidates even if not officially raised as a complaint."

Survey form
The categories (Services, Venue, Facilities, Material and Trainer) are a minimum requirement. The questions within each category are suggestions only and we encourage these be changed as long as they are proven to be relevant to the continual improvement of the Organization.

Survey summary
The summary should enable the Organization to compile survey results, analyse them and take action where required. An area has been added for the trainer to record comments that were made during the training but were not shared via a survey form.
Please note that the current categories and questions are automatically extracted from the Survey form. A change in a question will be automatically reflected in the summary, however, additional questions need to be added manually.

Internal audit trail

Purpose: to provide training Organizations with a supporting document that they can use to perform their internal audits and keep track of the audits performed.

How to use it. This document becomes part of the Organization's Quality Management process and it is the Organization's responsibility to keep it up to date.
It is recommended to adapt it to the Organization's best practices:
- Document name and version number.
- Column titles may be renamed to use terms more commonly used by the Organization.
- Columns 1, 2, 3 and 4 contain the formal requirements and can't be modified.
- The audit scope may vary from time to time but must be relevant and clearly stated for each audit.
- The verifications may vary from time to time but must be relevant and clearly stated for each audit.
- Feel free to increase the scope to include other risk areas (IT, information security...).

The Internal audit trail shows a 3 years cycle that matches the re-accreditation cycle; all requirements must be checked at least once during one cycle, or more if an audit has raised issues.
The audit trail is only valid if thoroughly filled. Audit records must be kept for a minimum of 6 years

Internal audit process
It should be performed by someone who isn't the process owner or who isn't involved in the process; it can be someone from outside the organization. It is expected to include live observations and documentation verifications to be performed on several stages of the training delivery process. The audit trail is only valid if all records verified are included in the file.

ATC Proctor/Trainer list
The Organization must maintain a list of all of its own and its Affiliates' trainers, including names, contact details, training qualifications, and certification status, and must make this list available to The Open Group promptly upon request. This also includes proctors, when applicable.

References:
All Training Course Accreditation documents are displayed on
http://certification.opengroup.org/training-course-accreditation-docs or
http://opengroup.org/certifications/accreditation