UPDATING 360 FEEDBACK & LOCATE STATUSES

A HOW TO GUIDE

ONTARIO ONECALL

LOCATE TIMELINES OVERVIEW
SINGLE ADDRESS REQUESTS

5 Business Days

+
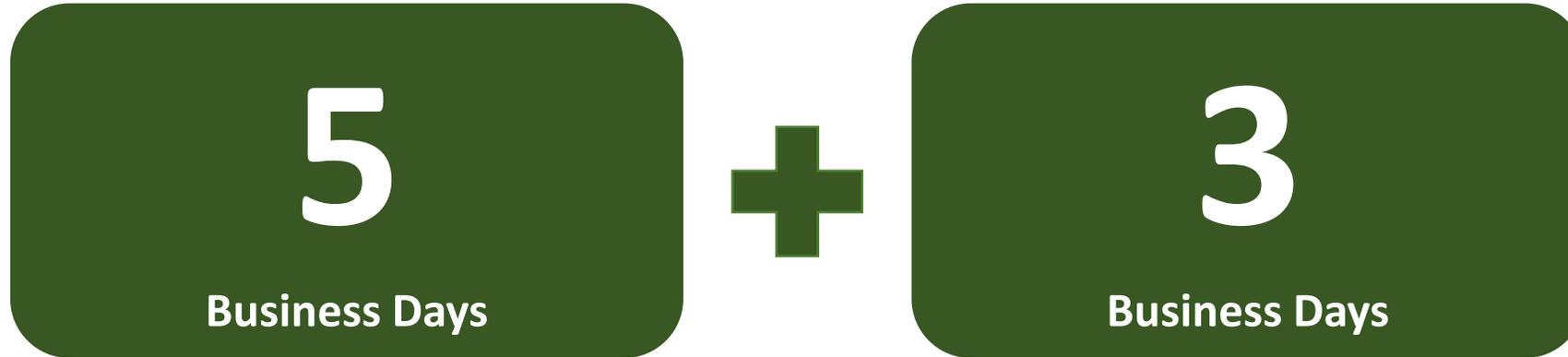
3 Business Days

Members are required to complete locates within 5 business days of receiving a single address request. A single address refers to a standard locate notification in the Act.
S.6 (3) of the Act

Members need to provide an update to 360 Feedback within 3 business days of completing a locate.
S.14 (1) of the Act

ONTARIO ONECALL

LOCATE TIMELINES OVERVIEW
ADVANCED REQUESTS

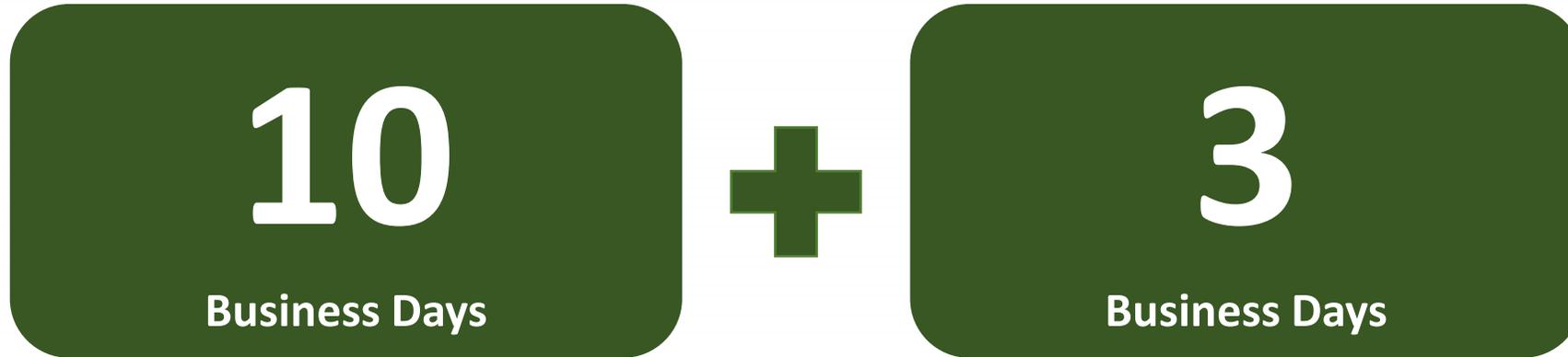**10** Business Days **+** **3** Business Days

Members are required to complete an advanced request within 10 business days of receiving the notification. Advanced requests refer to **large excavation or dig sites** defined as (a) at least two properties or parts of properties, each having its own municipal address, or (b) one or more properties or parts of properties, at least one of which has no municipal address. **O Reg. 136/24**

Members need to provide an update to 360 Feedback within 3 business days of completing a locate.
S.14 (1) of the Act

ONTARIO ONECALL

LOCATE TIMELINES OVERVIEW
DEDICATED LOCATE REQUEST

10
Business Days

+

3
Business Days

The Dedicated Locator is required to complete a locate within 10 business days of receiving the Dedicated locate notification.
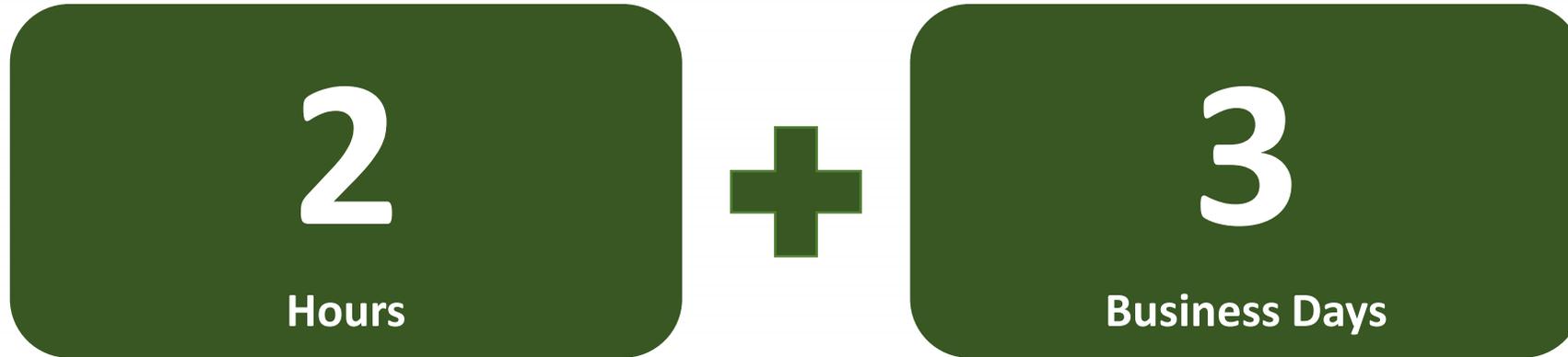**S.7 (10) of the Act**

Member or Dedicated Locator shall notify Ontario One Call within 3 business days of completing a locate.
S.14 (1) of the Act

ONTARIO ONE CALL

LOCATE TIMELINES OVERVIEW
EMERGENCY LOCATE REQUEST

2
Hours

+

3
Business Days

Members are required to have a person onsite or provide a clearance within 2 hours.
S. 6 (4) of the Act

Members need to provide an update to 360 Feedback within 3 business days of completing a locate.
S.14 (1) of the Act

ONTARIO ONECALL

360 FEEDBACK DEFINED

"360 Feedback" means the web-based solution provided by Ontario One Call for either:

(i)   Members or Members' designates to use to notify Ontario One Call whenever the status of a Locate Request has changed or

(ii)   anyone that has requested a locate to use the online function and check the status of their request or find contact information for each member notified.

BENEFITS OF UPDATING 360 FEEDBACK?

Besides being a legal obligation for Members to update 360 Feedback, the information provided is also valuable to Excavators, Ontario One Call and other Members.

Major Benefits:
- de-escalate suspected late locate situations
- reduce reach outs and follow up calls
- validate the renegotiation of a new due date
- notify Ontario One Call of a Locate Delay
- track locator performance, whether it be internal staff or an external locating company completing locates

360 FEEDBACK OBLIGATIONS
SECTION 14(1) of the Act

3

Business days

Upon completing a locate a Member (or their LSP) must update 360 Feedback within **three (3) Business Days.**

STATUS OPTIONS

360 FEEDBACK

360 FEEDBACK STATUS OVERVIEW

Temporary Status
These statuses do not stop or change the response time required for the Member to complete a locate request

| Not Completed | Notification Sent | Requestor Must Provide More Info | Sent to Locator | Contact member |

Temporary Status
Changes the legal due date. Response required by the new renegotiated date.

| Renegotiated |

Complete Status
Only way to legally complete a locate request in 360 Feedback.

| Cleared | Completed |

ONTARIO ONE CALL

360 FEEDBACK STATUSES

Notification Sent

This is the default status that is assigned to a locate by Ontario One Call to identify the locate was sent to the Member/LSP. This status cannot be re-assigned

Sent to Locator

If locates are screened for possible clearances before going to an LSP, this status should be the first status assigned if a physical locate is needed.

Completed and Cleared are the only compliant statuses

360 FEEDBACK STATUSES

Not Completed

Can be used for many reasons e.g. Locator has started but not completed locate

Requestor Must Provide More Info

The locate request could be too vague or may require clarification

Contact member

The Member would like the Excavator to contact them

Completed and Cleared are the only compliant statuses

ONTARIO ONECALL

360 FEEDBACK STATUSES

Renegotiated	**Cleared**	**Completed**
An alternate locate due date was mutually agreed in writing by both Member/LSP and Excavator. For More info: [Click Here](#)	The excavation will not affect the infrastructure. Paperwork has been provided to the Excavator	The infrastructure has been marked and paperwork has been provided to the Excavator

Completed and Cleared are the only compliant statuses

ONTARIO ONE CALL

LOGGING IN TO THE WEB PORTAL

On the landing page of the Web Portal log in as a Member

I am a:

To begin, please select the option which best describes you.

Why am I here?

CONTRACTOR
Select this option if you are digging as a professional excavator, professional landlord, or excavating for/on behalf of a business or organization.

HOMEOWNER
Select this option if you are digging on your property of residence which you rent or own, or if you are digging on a residence property owned or rented by a friend or family member.

MEMBER
Select this option if you are an Owner of Underground Infrastructure.

(reach out to MemberServices@OntarioOneCall.ca if you do not have access)

SEARCHING FOR REQUESTS

- Click on the Request Search field

- Use the basic search to search using the locate request number of the locate that requires a status update

- Use the Advanced Search to search with different parameters such as date, location, type of request, station code, etc.

Tell us what you are doing!

🔍 Request Search

Advanced Search

Please enter a request #

Request #   2019381563

Reset   Search   Close

EXPANDED SEARCH RESULTS VIEW

- When using the Advanced Search feature, the results may be displayed in an expanded list or a collapsed list.
- The image below is the Expanded list which can be sorted using various criteria.
- Select the request number in green to open the locate or click "Collapsed List" to change your view
- Data can be exported monthly from the web portal. You can find the how-to guide here

COLLAPSED SEARCH RESULTS VIEW

- This is what the Collapsed Search list looks like

- Scroll through the list on the left and click on the locate you'd like to update
- You can return to the expanded list by clicking "Expand List"

SEARCH RESULTS

- The locate details are found to the right of the list. Scroll down to view all of the details

- Click on "Locate Status" to skip to the status section or scroll down

NOTIFICATION LIST

Member Name	Station Code	Contact	Status	Action
PVS FOR CITY OF HAMILTON WATER (HW01)	HW01		CLEARED	View History
PVS FOR COGECO CONNEXION (CPVS2)	CPVS2		NOTIFICATION SENT	View History
PVS FOR ALECTRA UTILITIES-HAMILTON HYDRO (LOCAL HYDRO) (HHP1)	HHP1		NOTIFICATION SENT	View History
PVS FOR ENBRIDGE GAS (LEGACY UNION GAS) (EN2HN01)	EN2HN01		NOTIFICATION SENT	View History
PVS FOR ENBRIDGE GAS CRITICAL LINES (LEGACY UNION) (ENCLHAM)	ENCLHAM		NOTIFICATION SENT	View History
CRAMM FOR STREET LTG (HHP3)	HHP3		NOTIFICATION SENT	View History
PVS FOR BELL CANADA (BCHN01)	BCHN01		SENT TO LOCATOR	View History

- This is the list of infrastructure owners has been notified and their current statuses
- The default status is "Notification Sent"
- The notifications you are responsible for updating will show a "view" option. There could be more than one depending on your set up

*A renegotiation must be mutually agreed upon by the Infrastructure Owners/LSP and Excavator

ONTARIO ONECALL

NOTIFICATION LIST

Status	Renegotiated	Closed	Updated	Notes	Action
CLEARED		05/15/2023 07:28	05/15/2023 07:28		View History
NOTIFICATION SENT			05/15/2023 02:05		View History
NOTIFICATION SENT			05/15/2023 02:05		View History
NOTIFICATION SENT			05/15/2023 02:05		View History
NOTIFICATION SENT			05/15/2023 02:05		View History
NOTIFICATION SENT			05/15/2023 02:05		View History
SENT TO LOCATOR			05/15/2023 05:47		View History

- Use the horizontal scroll bar at the bottom to view the contact information and any notes for all members

*A renegotiation must be mutually agreed upon by the Infrastructure Owner/LSP and Excavator

ONTARIO ONE CALL

VIEWING THE LOCATE STATUS BOX

- Clicking on "View" opens the Locate Status window in a view only state. No edits are possible

LOCATE STATUS - EDIT

- To update the status of a locate, click on "Edit Request" near the top of the screen

- A box will populate asking you to choose the action to perform on the locate in question. Click "Locate Status Modification"

- The "View" option is now "Edit". Click on "Edit'

LOCATE STATUS - EDIT

- Notification Sent is the original status assigned to a locate

- There are 2 mandatory fields needed for every update – the status and processed by field

- The other mandatory fields vary based on the status that is being assigned

- If a mandatory field is not filled out, the system will provide you with feedback on which fields are mandatory when trying to save. The following chart provides a detailed outline of all relevant status information

STATUS OVERVIEW

Status	Use	Mandatory Fields			
		Closed Date	Processed By	Renegotiated Date	Notes
Completed	Locate area was physically marked	X	X		
Marked/Completed	Use "Completed"	X	X		
Cleared	The excavation will not affect the infrastructure and paperwork has been provided to the excavator	X	X		
Not Completed	Temporary status used when a locate has not been completed		X		X
Contact Member	Something is preventing the completion of the locate i.e. broken tracer wire, site access needed, etc.		X		
Renegotiated	The excavator and LSP mutually agreed to an alternate locate due date in writing	X	X	X	X
Requestor Must Provide More Info	More information is needed in order to provide a locate response.		X		X
Not Completed/Needs Additional Info	Select the stand alone status "Not Completed" or "Requestor Must Provide More info"		X		

TIP – The statuses highlighted in yellow are older 360 Feedback responses. Statuses were updated in 2017 to provide more clarity. The previous statuses remain in the system as they are still used by Members with older software. Please select the newer statuses

ONTARIO
ONECALL

IMPORTANT CONSIDERATIONS ABOUT STATUS

- COMPLETED and CLEARED are the **ONLY** compliant statuses

- If a locate is no longer required (e.g. the excavator has reached out saying it is no longer needed AFTER the work to begin date), please mark the request as 'Completed' with a closed date and add a note explaining the situation.

ONTARIO ONE CALL

LOCATE STATUS - EDIT

- The fields that most commonly require updating include:
  - Status
  - Processed by
  - Closed date
  - Notes

- Feel free to use the other fields that are available as you see fit

ASSIGNING A STATUS

- Click on the Status field to open the drop down menu

- Use the scroll bar on the left of the status drop down to select the accurate status

ASSIGNING A STATUS

- You have **not** met your legal obligation if you have selected the following statuses:
  - Contact Member
  - Needs Additional Info
  - Requestor Must Provide More Info
  - Not Completed

- Enter your name in the Processed by field

- Use the **Notes** to explain why the status has been assigned

- Click **Save**

For an official locate response, the Request status MUST be updated and CLOSED

ASSIGNING A COMPLIANT STATUS
& CLOSING A LOCATE

- **Status**: Select the accurate status
  - Was the locate cleared onsite?
    - Select **Cleared**
  - Was the infrastructure marked?
    - Select **Completed**
- **Closed Date**: This is the date the paperwork is provided to the Excavator
- **Processed By**: Add the name of whomever is updating the status

For an official locate response, the Request status <u>MUST</u> be updated and <u>CLOSED</u>

FINALIZING A LOCATE

Locate Status ×

2019384600

Clearance #

Status
COMPLETED ⌄

Renegotiated Date

Processed By
Crystal 🔍

Locator
🔍

Region

Work Started
No ⌄   ☐ Flags on Site?

Area Marked
No ⌄   ☐ Site Visit?

Notes (Max. 500 Characters)

G-TEL FOR UNION GAS (UGONE01)

Type
CHOOSE A TYPE ⌄

Closed Date
📅 10/03/2019

Last Updated
01/24/2022

Accepted By

Internal Order #

☐ Stakes on Site?   ☐ Paint on Site?

☐ Are Notes Private?   ☐ No Network Present

500 characters left

Cancel   Save

- Here's an example of what a nearly finalized Completed status update looks like

- Remember, a closed date is required when a cleared or completed status is assigned

- After all of the required fields are filled out click **Save**

Each Member is solely responsible for the accuracy and adequacy of their locates, and any information provided to Ontario One Call

FINALIZED LOCATE

Locate Status

Member Name	Station Code	Status	Renegotiated	Closed	Updated	Action
PROMARK FOR BELL CANADA (BCTE01)	BCTE01	NOTIFICATION SENT			01/24/202	History
CHIPPEWAS OF RAMA (CHPPWA01)	CHPPWA01	NOTIFICATION SENT			01/24/202	History
G-TEL FOR HYDRO ONE (H5ONE01)	H5ONE01	NOTIFICATION SENT			01/24/202	History
G-TEL FOR BELL CANADA (BCONE01)	BCONE01	NOTIFICATION SENT			01/24/202	History
G-TEL FOR UNION GAS (UGONE01)	UGONE01	COMPLETED		10/03/2019 00:00	02/03/202	View History

ONTARIO ONE CALL

CLOSED DATE

- An accurate **Closed Date** is **mandatory** when finalizing a locate. The closed date should be the date the paperwork was provided to the excavator.

- Failing to include a **Closed Date** means the locate stays open and the clock keeps counting the days it takes to finalize the locate.

- If there's no closed date by the intended timeline, it will be considered "non-compliant no response" even if the locate or clearance has been provided to the requestor.

Completed

Cleared

CLOSED DATE

ONTARIO ONE CALL

NOTES
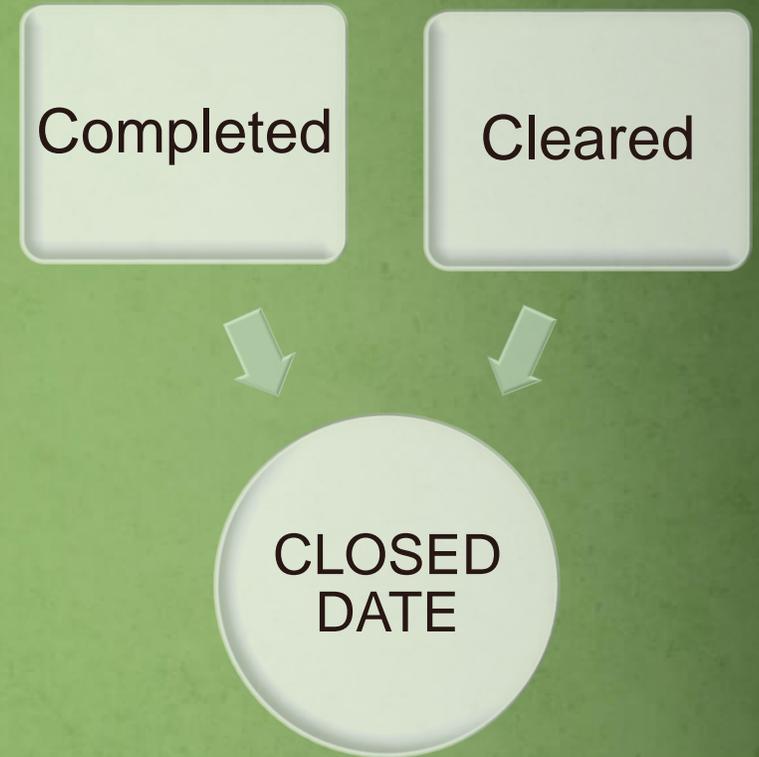
```
Renegotiated

        Requestor
        Must Provide
        More
        Information

                        Not
                        Completed

                NOTES
```
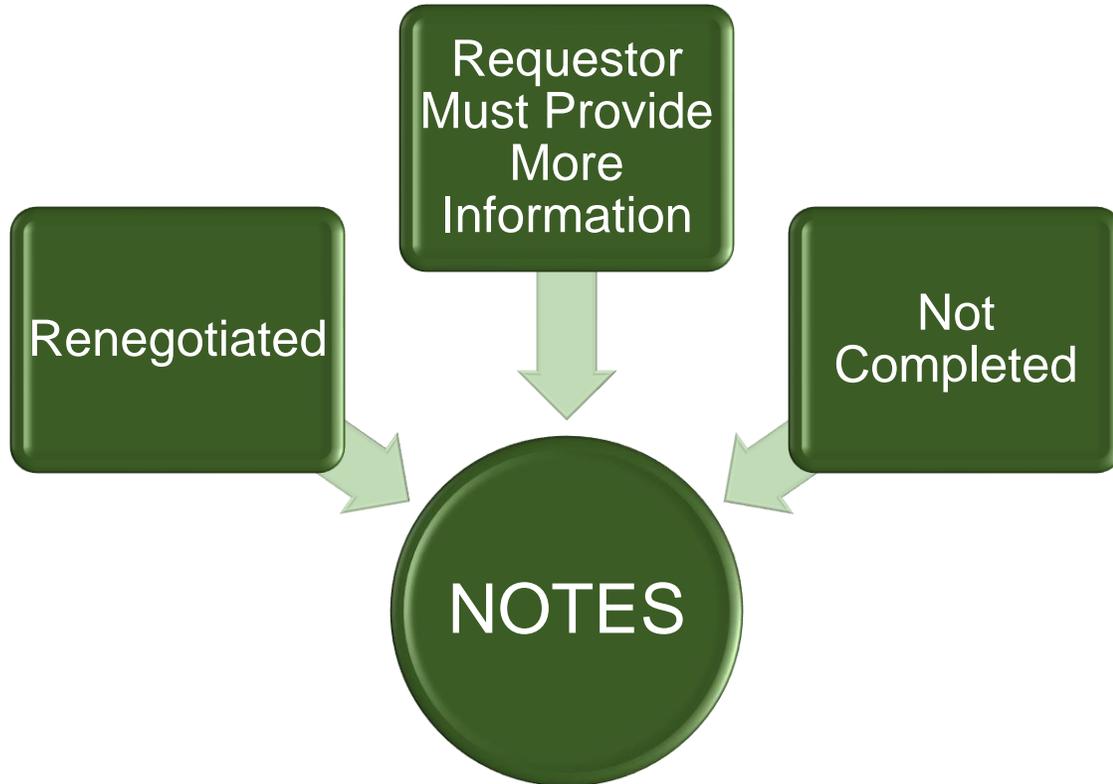
The Notes field should be used to document any communication with the Requestor or anything abnormal about the locate.

Examples:

1. Renegotiated: new due date of June 14th approved in writing to change legal due date on June 1st by Dwayne Roberts, project lead

2. Requestor Must Provide More Information: 06/01/2024 L/M for Steve requesting site plans to clarify dig location

3. Not Completed: 06/01/2024 Broken tracer wire. Will be onsite to rectify on June 8th

*Remember, none of these statuses are complete. Further action must be taken to fulfill your locate obligations.
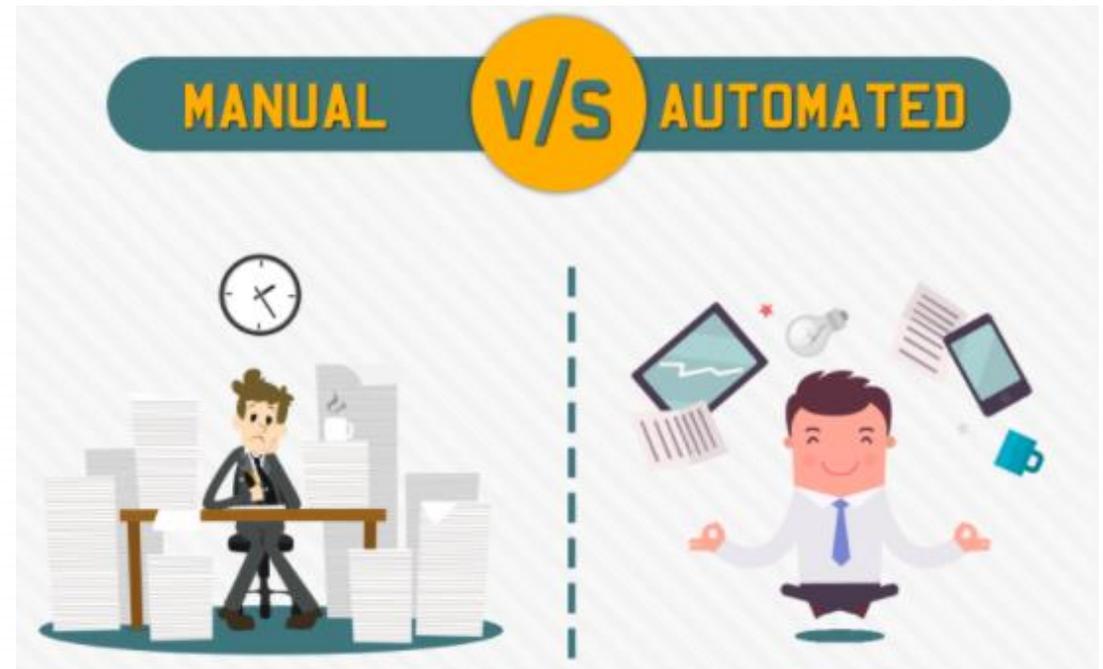
ONTARIO ONECALL

AUTOMATED SOFTWARE

• Options are available to automate your responses to 360 Feedback. It becomes advantageous when receiving 4 or more locates per day on average

Source: www.qualitesoft.com

SOFTWARE

There are two options available to automate the 360 Feedback responses

Please note: should the Member decide to purchase software, they are responsible to make sure it correctly integrates with 360 Feedback

1. Program your existing work management system, using our Web Service document, to respond directly to 360 Feedback

2. Purchase software that will automatically update 360 Feedback, while also providing many other benefits to streamline your locate processes

ONTARIO
ONE CALL

AUTOMATED SOFTWARE

Contact our Education & Training team to request the Web Service document or for a list of available Software Providers

Training@OntarioOneCall.ca