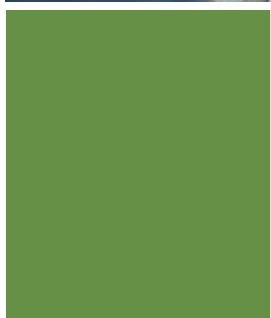


# EDUCATE

## INTERNSHIP SUPPORT PROGRAM

Ontario  
Funeral Sector



**NOTICE:** Effective April 1, 2016, the Bereavement Authority of Ontario assumed responsibility for the licensing and enforcement activities previously exercised by the Board of Funeral Services (BOFS) and BOFS was dissolved as a corporation. This publication remains for informational purposes. Please contact the BAO at 1-844-493-6356 or visit [www.bereavementauthorityontario.ca](http://www.bereavementauthorityontario.ca) for more information.



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## Introduction

Fair assessment of an intern's competence begins and ends with the preceptor.

Throughout the internship term, the preceptor is responsible for ensuring that the intern receives proper training in each of the identified competencies for the specified personal licence class; a task that may involve input from a number of team members with various areas of focus or specialty (e.g. embalming, preneed arrangements, at need arrangements, and administration).

Designed on the premise of a 'learning journal', the *Internship Support Portal* provides a centralized forum to record learning progress by inputting Competency Achievements and required BOFS Reports for assessment by the preceptor.

Created as a collaborative and interactive process for interns and preceptors, the success of an intern is best supported with the input of regular entries on a weekly basis; a commitment that requires an investment of approximately one hour of time per week.

While the *BOFS Funeral Sector Professional Competency Profiles – Second Edition* and *Success Passport* for the specified personal licence class provides a point of reference, reporting and assessing an intern's progress must be completed using the *Internship Support Portal*.

When the initial assessment is completed it is expected that the intern will achieve a level of 1: Developing (red) in most Areas (A), Competencies (C) and Sub-competencies (SC). As learning progresses throughout the internship term, the Level of Achievement is anticipated to grow incrementally.

The goal over time is to become 3: Competent (green) in most components and 2: Knowledgeable (yellow) in other components, as indicated by an asterisk (\*). In some cases, the intern may achieve a level of 4: Advanced (blue) however it is not anticipated that advanced status will be achieved in all instances.

The *Internship Support Portal – Instruction Manual* is a guide that is intended to support preceptors and interns. Content is based on the knowledge available at the time of printing. The document will be updated as necessary.

## Helpful Hints

Criteria for the *Internship Support Portal* is based on the competencies identified for each specified personal licence class in the *BOFS Funeral Sector Professional Competency Profiles – Second Edition*.

To download a copy of the *BOFS Funeral Sector Professional Competency Profiles – Second Edition* or the *Success Passport*, please visit the Resources section of the *Internship Support Portal*.

The legend below outlines the naming convention that has been put in place to identify the individual components that must be assessed by the preceptor during the internship term which are referenced in the *BOFS Funeral Sector Professional Competency Profiles – Second Edition* and throughout the *Internship Support Portal*:

Abbreviation	Component
A	Area
C	Competency
SC	Sub-competency
EPD	Expected Performance to Demonstrate
SCOM	Sub-competency Owner/Manager

Abbreviated references for each personal licence class on the *Internship Support Portal* are as follows:

Abbreviation	Component
FD1	Funeral Director – Class 1 (embalming)
FD2	Funeral Director – Class 2 (non embalming)
TSSR	Transfer Service Sales Representative
FPP	Funeral Preplanner

The Level of Achievement assigned by the preceptor on the *Internship Support Portal* throughout the internship term, is based on the scale and definitions outlined below:

Level of Achievement	Definition
1: Developing (red)	The intern has little or no knowledge/experience of this competency; would need some training to achieve its requirements.
2: Knowledgeable (yellow)	The intern has some knowledge/experience of this competency but may need some guidance or support from others to achieve its requirements.
3: Competent (green)	The intern has good knowledge/experience of this competency; can achieve and maintain its requirements on a consistent basis.
4: Advanced (blue)	The intern has very good knowledge experience of this competency; can consistently achieve its requirements and is able to support others.

# **Preceptor Instructions**

## Preceptor: Quick Reference Guide

Launch access as a preceptor through ensuring the intern has first logged into the *Internship Support Portal*. Entries submitted by the intern and other portal information cannot be viewed by the preceptor until this step is complete.

Login Details:

- [https://www2.skilsure.net/skilsure\\_bofs\\_interns/](https://www2.skilsure.net/skilsure_bofs_interns/)
- Username: Licence Number
- Password: Licence Number + last name (all lower case)

To obtain a forgotten password, click ‘Forgot Password’ and the information will be forwarded to the email address on file with the regulator.

### Initial Assessment (Beginning of Internship Term)

Establish a platform for success through conducting an initial assessment of the intern’s current level of competence during the first two weeks of internship. Investing the time to understand the process and conduct a thorough assessment from the outset will provide a solid foundation for learning opportunities throughout the internship term.

1. To conduct the initial assessment, visit the Tab: Intern Progress, select the name of the intern, and click View Progress by Competency.
2. During the initial assessment, conduct a review of each Area (A), Competency (C) and Sub-competency (SC) with the intern.
3. Assign a Level of Achievement to each Competency (C) and Sub-competency (SC) based on the intern’s initial demonstration of knowledge in each category.

It is expected that the intern will be assessed at a 1: Developing (red) for the majority of identified components. As learning progresses throughout the internship, Levels of Achievement will evolve to reflect the intern’s growing competence.

### Ongoing Assessment of the Intern’s Competence (Approximately One Time Per Month)

Commit to an ongoing assessment of the intern’s competence through reviewing submissions and assigning Levels of Achievement on a monthly basis at minimum.

1. Access the Tab: Intern Progress approximately once per month to update the intern’s progress based on submitted Competency Achievements and BOFS Reports.
2. As each component is assessed, assign a Level of Achievement to the overall area based on assessment of each Competency (C) and Sub-competency (SC) through the Tab: View Progress by Area.



# Internship Support Portal – Instruction Manual

## **Reviewing Submissions** (Approximately Once Per Week)

Access the *Internship Support Portal* approximately once per week to review Competency Achievements and BOFS Reports submitted by the intern.

1. For each Competency Achievement, assign a Level of Achievement to the reported Expected Performance to Demonstrate (EPD).
2. If any submission of either category is rejected or needs correction, provide an explanation in the comment section.

## **Technical Support**

For email technical support, make changes to your password, or to sign out, click the Wheel Cog located in the top right hand corner of the screen.

# Internship Support Portal – Instruction Manual

## Tab: Notice Board

The opening screen is the Notice Board. Each time the intern submits documentation, the preceptor will be notified.

It is important to note that Tab: Notice Board links to Tab: Documentation. When information is accessed on the Notice Board, the information that is presented appears under the Tab: Documentation.

To receive an email each time a notice is posted on the Notice Board click the box requesting “I would like to receive email notifications as well”.

For the purposes of the *Internship Support Portal*, documentation is defined as either:

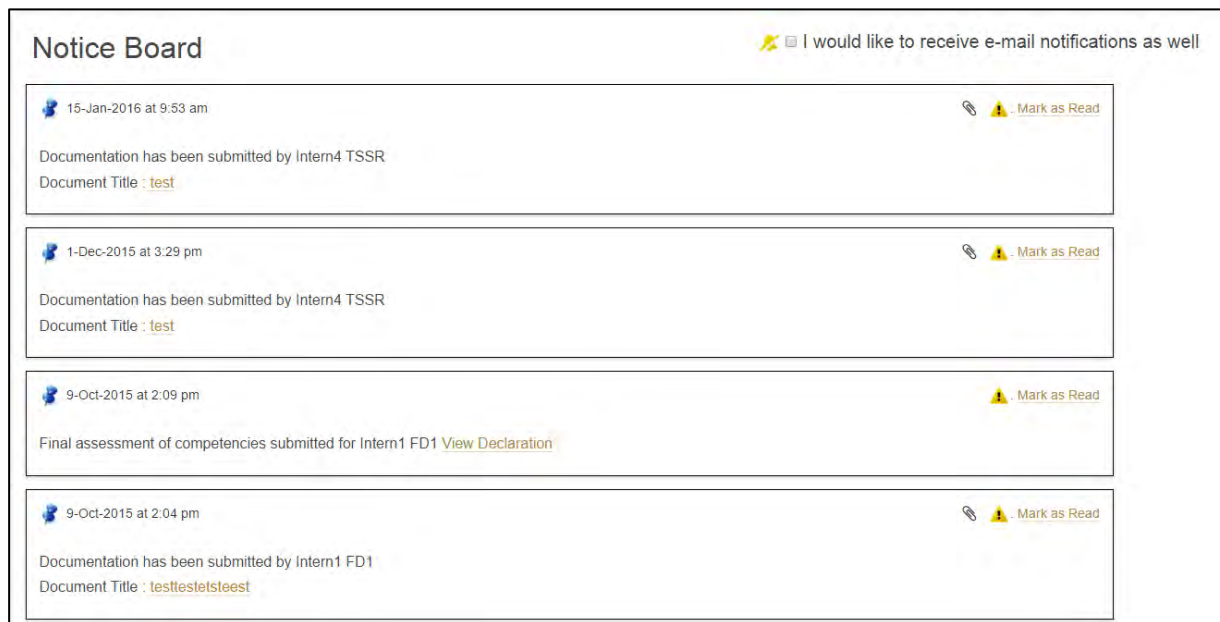
- Documentation – by Competency or
- Documentation – by BOFS Reports

When documentation is received from the intern, click the Review Document Submission link to view the submission.

After viewing the submission click Mark as Read on the Notice Board to indicate that the documentation has been reviewed. Documentation that has been marked as read will be removed from the Notice Board.

To view a detailed listing of reported Documentation – by Competency or Documentation – by BOFS Report, click the Tab: Documentation.

Each piece of documentation submitted by the intern will have the paper clip symbol if there is an attachment.

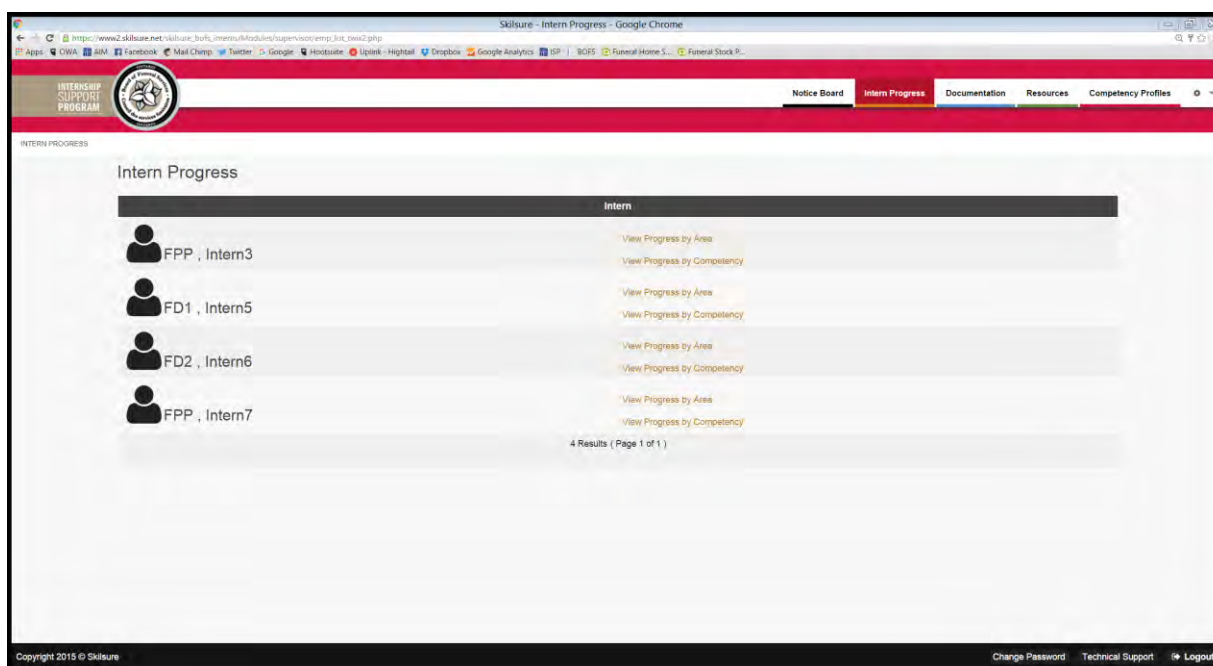


Screenshot - Preceptor Notice Board

# Internship Support Portal – Instruction Manual

## Tab: Intern Progress

The Tab: Intern Progress page, provides a complete list of the intern(s) that are currently assigned to the preceptor.



Screenshot - Tab: Intern Progress

Access to the initial assessment that needs to be completed for each registered intern during the first two weeks of internship registration is provided at Tab: Intern Progress.

Tab: Intern Progress offers the preceptor with a choice to either View Progress by Area or View Progress by Competency. The applicable Area (A) for each personal licence class is defined in the *BOFS Funeral Sector Professional Competency Profiles – Second Edition*.

Area	Funeral Director – Class 1 (embalming)	Funeral Director – Class 2 (non embalming)	Transfer Service Sales Representative	Funeral Preplanner
Communication and Responsiveness	✓	✓	✓	✓
Care of the Deceased	✓	✓	✓	N/A
Disposition, Funeral Services and Visitation	✓	✓	✓	✓
Business Practice	✓	✓	✓	✓
Professionalism	✓	✓	✓	✓

# Internship Support Portal – Instruction Manual

## View Progress by Area

The pie chart provides an outline of the intern's progression in each Area (A). Prior to the initial assessment being conducted, all pieces of the pie chart will be grey. Once the initial assessment is complete, colours will be added to the pie chart which reflects the Level of Achievement that has been assigned by the preceptor.

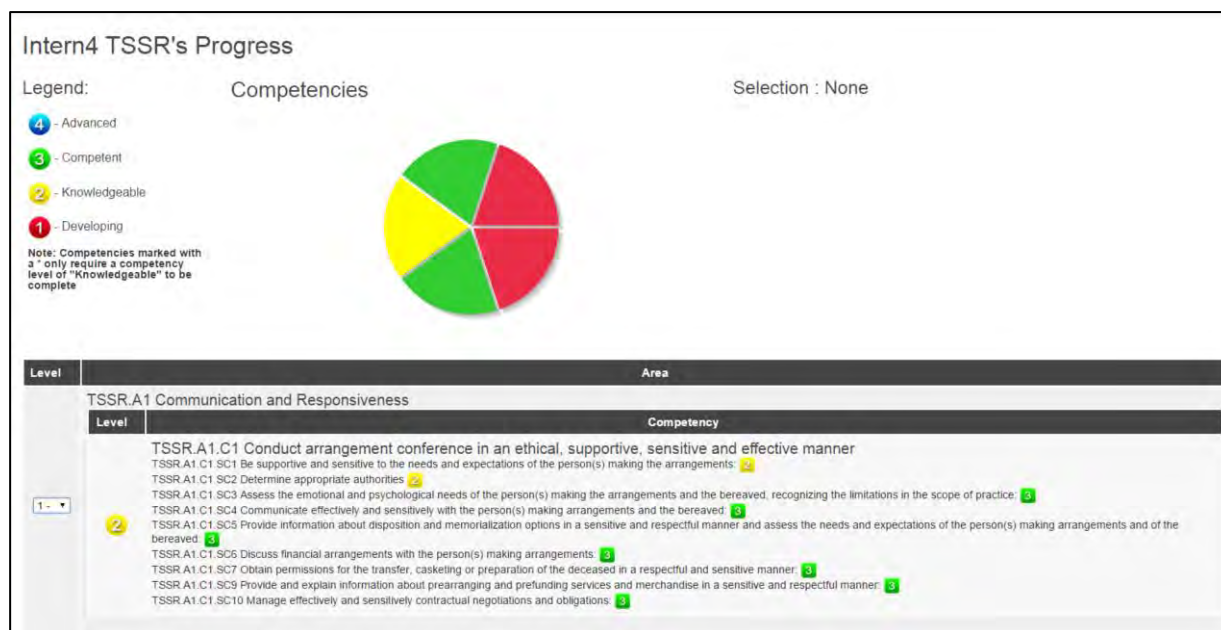
Below the pie chart, each Area (A) has a dropdown menu that allows the preceptor to assign the intern's Level of Achievement:

- 1: Developing (red)
- 2: Knowledgeable (yellow)
- 3: Competent (green) or
- 4: Advanced (blue)

It is expected that the colours on the pie chart will change throughout the internship term as the intern's learning progresses.

For each Area (A), the Level of Achievement that has been assigned to each Competency (C) and Sub-competency (SC) is displayed. By reviewing the Level of Achievement assigned to each Competency (C) and Sub-competency (SC), the preceptor is able to determine the Level of Achievement that has been assigned to the specified Area (A).

To view competencies and sub-competencies prior to determining the appropriate Level of Achievement by Area, click View Progress by Area.



Screenshot - View Progress by Area

# Internship Support Portal – Instruction Manual

## INTERNSHIP SUPPORT PROGRAM

### View Progress by Competency

The pie chart provides an outline of the intern's progression in each Competency (C) and Sub-competency (SC). Prior to the initial assessment being conducted, all pieces of the pie chart will be grey. Once the initial assessment is complete, colours will be added to the pie chart which reflects the Level of Achievement that has been assigned by the preceptor.

Below the pie chart each component of the individual competencies and sub-competencies are provided in a list format. A dropdown menu for the Level of Achievement is provided for each Competency (C) and Sub-competency (SC).

Below each Sub-competency (SC) the respective Expected Performances to Demonstrate (EPD) are identified. To the right of each Expected Performance to Demonstrate (EPD), the current Level of Achievement that has been assigned by the preceptor is provided. Competency Achievements, related to each Expected Performance to Demonstrate (EPD) may be viewed by clicking View Documentation.

As the Screenshot - View Progress by Competency indicates, a view of the Competencies, Sub-competencies and Expected Performances to Demonstrate is provided to support the determination of the appropriate Level of Achievement for each Competency (C) and Sub-competency (SC).

Note: The Level of Achievement assigned to an Expected Performance to Demonstrate (EPD), will appear to the right of the EPD in static form. The Expected Performance to Demonstrate (EPD) cannot be adjusted from this screen. To change the Level of Achievement click the View Documentation button that appears beside the assigned number / Level of Achievement.

Level	Competency	Subcompetency
	FD1.A1.C1 Conduct arrangement conference in an ethical, supportive, sensitive and effective manner	
		FD1.A1.C1.SC1 Be supportive and sensitive to the needs and expectations of the person(s) making the arrangements:
3		FD1.A1.C1.SC1.EPD1 communicate in a manner deemed supportive and sensitive consistent with accepted professional practice <a href="#">View Documentation</a>
		FD1.A1.C1.SC1.EPD2 receive the initial enquiry and subsequent – by telephone, in person or other means <a href="#">View Documentation</a>
		FD1.A1.C1.SC1.EPD3 provide required information and respond to requests, clarifying any misinformation or misperceptions <a href="#">View Documentation</a>
		FD1.A1.C1.SC1.EPD4 arrange follow up as required <a href="#">View Documentation</a>
3		FD1.A1.C1.SC2 Determine appropriate authorities
		FD1.A1.C1.SC2.EPD1 ask appropriate questions to determine who has the legal authority to make arrangements for a funeral or disposition of the deceased, obtaining written confirmation and supporting documentation to make arrangements for a funeral or disposition of the deceased, obtaining written confirmation and supporting documentation wherever necessary and possible <a href="#">View Documentation</a>
		FD1.A1.C1.SC3 Assess the emotional and psychological needs of the person(s) making the arrangements and the bereaved, recognizing the limitations in the scope of practice:
3		FD1.A1.C1.SC3.EPD1 determine the concerns, expectations and needs of the person(s) making the arrangements, based on verbal and non verbal communication <a href="#">View Documentation</a>
		FD1.A1.C1.SC3.EPD2 show concern for those who are in distress, while retaining professional objectivity <a href="#">View Documentation</a>
		FD1.A1.C1.SC3.EPD3 understand and be able to explain fundamental theories of grief or common reactions to grief <a href="#">View Documentation</a>
		FD1.A1.C1.SC3.EPD4 where beyond the scope of practice make persons aware of the availability of counselling or refer to appropriate health care professional(s), e.g. physician, grief counsellor or therapist <a href="#">View Documentation</a>
		FD1.A1.C1.SC3.EPD5 understand how grief affects the functioning of a family from childhood through adulthood, and respond appropriately <a href="#">View Documentation</a>
		FD1.A1.C1.SC3.EPD6 be sensitive and accepting of the person's social, cultural and economic status and religious or philosophical persuasion <a href="#">View Documentation</a>
		FD1.A1.C1.SC3.EPD7 remain aware of different coping styles, attitudes and expectations among those affected by death <a href="#">View Documentation</a>
		FD1.A1.C1.SC4 Communicate effectively and sensitively with the person(s) making arrangements and the bereaved:
		FD1.A1.C1.SC4.EPD1 apply basic techniques of dispute resolution and counselling, including communication and listening skills, use of questions, identifying feelings, summarizing and paraphrasing, use of examples and clarifying <a href="#">View Documentation</a>
		FD1.A1.C1.SC4.EPD2 obtain complete and accurate information for the purpose of documentation <a href="#">View Documentation</a>
3		FD1.A1.C1.SC4.EPD3 assist in the preparation of death announcements <a href="#">View Documentation</a>
		FD1.A1.C1.SC4.EPD4 communicate in a manner that exemplifies reverence, empathy and dignity at all times <a href="#">View Documentation</a>
		FD1.A1.C1.SC4.EPD5 explain and discuss the importance of documentation (such as the Statement of Death – Form 15 and the funeral director's proof of death) <a href="#">View Documentation</a>
		FD1.A1.C1.SC4.EPD6 explain and discuss price list and options for disposition <a href="#">View Documentation</a>
		FD1.A1.C1.SC4.EPD7 maintain confidentiality of information at all times <a href="#">View Documentation</a>
		FD1.A1.C1.SC4.EPD8 use all means of communication effectively <a href="#">View Documentation</a>
		FD1.A1.C1.SC5 Provide information about disposition and memorialization options in a sensitive and respectful manner and assess the needs and expectations of the person(s) making arrangements and of the bereaved:
3		FD1.A1.C1.SC5.EPD1 explain available options for disposition and memorialization, including anatomical donation (organ, tissue, whole body) <a href="#">View Documentation</a>
2		FD1.A1.C1.SC5.EPD2 explain processes and procedures accurately and thoroughly to allow the person(s) making arrangements sufficient information to make informed decisions, including the potential advantages and disadvantages <a href="#">View Documentation</a>
		FD1.A1.C1.SC5.EPD3 present, describe and explain services and merchandise offered for sale <a href="#">View Documentation</a>
		FD1.A1.C1.SC5.EPD4 communicate limitation of scope of practice, available services or facilities <a href="#">View Documentation</a>
		FD1.A1.C1.SC5.EPD5 provide price list and explain clearly as it applies to the options offered <a href="#">View Documentation</a>
		FD1.A1.C1.SC6 Discuss financial arrangements with the person(s) making arrangements:

Screenshot - View Progress by Competency

The View Documentation button appears beside each Expected Performance to Demonstrate (EPD) and provides a link to the Document Submission Overview which includes the option to view documentation as either:

- Reviewed Documents
- Not Reviewed Documents

In addition, the document title, submission date, and document status (accepted or rejected) also appear.

To view details related to a specific submission, click on the document title. The information that follows shows the full document submission, including the Level of Achievement that has been assigned to each Expected Performance to Demonstrate (EPD).

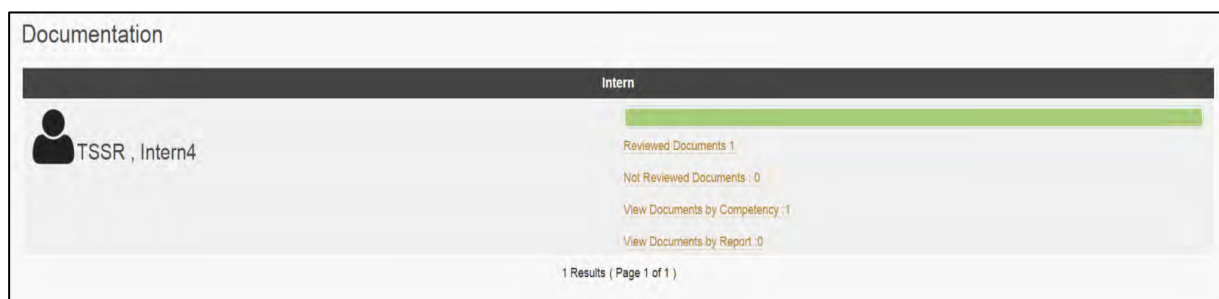
If a number does not appear beside the Expected Performance to Demonstrate (EPD), the intern has not reported having completed the Expected Performance to Demonstrate (EPD) or a Level of Achievement has not been assigned to the submission by the preceptor.

If a Level of Achievement has not been assigned, the preceptor may do so from this screen. Additionally, the preceptor could opt to change the Level of Achievement for any Expected Performance to Demonstrate (EPD) displayed.



## Tab: Documentation

The Tab: Documentation is a dashboard listing all active interns assigned to the preceptor.



Screenshot - Documentation

For each intern, the preceptor can review submissions based on the following categories:

- Reviewed Documents
- Not Reviewed Documents
- View Documents by Competency
- View Documents by Report

At any time during the internship, the preceptor can re-assess any component or review any piece of documentation. If the preceptor wishes to revise the assigned Level of Achievement for a particular submission, return to the documentation in question and change the Level of Achievement.

### Reviewed Documents

Click the Document Submission Overview of each Competency Achievement to view submissions that have been accepted by the preceptor.

### Not Reviewed Documents

Click the Document Submission Overview of each Competency Achievement that the intern has submitted to view submissions that have not been reviewed by the preceptor.

### View Documents by Competency

Click View Documents by Competency to view all Competency Achievements submitted by the intern. Headings that appear without a document below indicate that the intern has not submitted a Competency Achievement for the identified component.

### View Documents by Report

Click View Documents by Report to view all *BOFS Reports* submitted by category (e.g. embalming, preneed arrangements, at need arrangements, funeral directing).

## Documentation – Competency Achievements

Competency Achievements submitted by the intern appear in Documentation – Competency Achievements which is accessed by clicking View Documents by Competency.

Attachments are not required as part of Documentation – Competency Achievements, though the preceptor may determine if supporting documents are necessary to back up any or all submissions.

When assessing Documentation – Competency Achievements assign a Level of Achievement to each reported Expected Performance to Demonstrate (EPD).

Below each Expected Performance to Demonstrate (EPD) a dropdown menu appears with four options. From the menu select the appropriate level to correspond with intern's current Level of Achievement as outlined below.

Level of Achievement	Definition
1: Developing (red)	The intern has little or no knowledge/experience of this competency; would need some training to achieve its requirements.
2: Knowledgeable (yellow)	The intern has some knowledge/experience of this competency but may need some guidance or support from others to achieve its requirements.
3: Competent (green)	The intern has good knowledge/experience of this competency; can achieve and maintain its requirements on a consistent basis.
4: Advanced (blue)	The intern has very good knowledge experience of this competency; can consistently achieve its requirements and is able to support others.

Each time a review of Documentation - Competency Achievements is conducted the intern receives notification on the Notice Board to advise of the preceptor's decision to either 'accept' or 'reject' the submission. Decisions to mark Documentation – by Competency as 'rejected' require the preceptor to include an explanation in the comment section outlining the reason for the intern's documentation not being accepted.

Documentation – Competency Achievements that have been 'rejected' appear on the intern's Notice Board prompting the intern to review comments provided by the preceptor and take appropriate action. Competency Achievements that have been 'rejected' must be re-submitted by the intern for review by the preceptor.

Competency Achievements that have been 'accepted' will maintain the assigned Level of Achievement until new documentation is provided and the preceptor assigns a new Level of Achievement.

When the status has been assigned by the preceptor, click Save Review.



## Documentation – BOFS Reports

*BOFS Reports* submitted by the intern appear in Documentation – BOFS Reports which is accessed by clicking View Documents by Report.

All *BOFS Reports* templates are available in the Tab: Resources section. Each report must be completed on paper and submitted for approval by the preceptor.

When assessing Documentation – BOFS Reports open the attached files and confirm the *BOFS Report* matches the assigned Document/Category (e.g. embalming, preneed arrangements, at need arrangements, and funeral directing) depending on the intern's specified personal licence class.

After reviewing each *BOFS Report*, assign the Document Status as:

- Accepted
- Rejected or
- Under Review/Changes Required

Decisions to mark Documentation – BOFS Reports as 'Rejected' or 'Under Review/Changes Required' require the preceptor to include an explanation in the comment section outlining the reason for the intern's documentation not being accepted.

Once the status has been assigned by the preceptor, click Save Review.

Under the competency-based training model, an intern is not required to complete a minimum number of embalmings, preneed arrangements, at need arrangements, or funerals directed. Instead the preceptor is responsible for assessing the intern's competence in each identified area throughout the internship term.

The intern is however responsible for completing one *BOFS Report* for each embalming, preneed arrangement, at need arrangement and funeral directed until a personal licence has been issued.

## Tab: Resources

The Tab: Resources provides information to support interns and preceptors which includes *BOFS Reports*, the *BOFS Funeral Sector Professional Competency Profile – Second Edition*, legislative links, commonly asked questions and answers, the *Success Passport* for each personal licence class and the *Introduction to Embalming*, *Introduction to the Arrangement Conference*, *Introduction to Funeral Directing*.

## Tab: Competency Profiles

The Tab: Competency Profiles contains information found in the *BOFS Funeral Sector Professional Competency Profile – Second Edition*.

Click ‘Expand All Competencies’ to view all Areas (A), Competencies (C), Sub-competencies (SC) and Expected Performances to Demonstrate (EPD) according to specified personal licence class.

Information found in the Tab: Competency Profiles is static and provided only as a point of reference.

## Technical Support

For email technical support, make changes to your password, or to sign out, click the Wheel Cog located in the top right hand corner of the screen.

## Declaring an Intern's Competence

The preceptor is responsible for the fair assessment of an intern's competence.

An intern must be declared competent in all identified competencies for the specified personal licence class, prior to being eligible to graduate from an approved Funeral Service Education Program at an accredited educational institution in Ontario. Graduation from a Funeral Service Education Program deems the individual to be eligible to write the provincial entry to practice examinations offered by the regulator.

To declare an intern to be competent, the intern must have achieved a minimum level of 3: Competent (green), or as denoted by an asterisk (\*), a minimum level of 2: Knowledgeable (yellow), in each Area (A), Competency (C), Sub-competency (SC), and Expected Performance to Demonstrate (EPD). All information must be recorded on the *Internship Support Portal*.

When the minimum level of competence is both achieved and reported, and the preceptor is comfortable with declaring the intern to be competent, the preceptor is responsible for advising the accredited educational institution and the regulator through the *Internship Support Portal* by clicking the 'Complete' button located on the Tab: Intern Progress.

Components that are highlighted in red indicate that:

- the intern has not submitted a Competency Achievement for a particular Expected Performance to Demonstrate (EPD) **or**
- the preceptor has assigned a Level of Achievement that is below the required minimum level of competence

In either instance, the intern or the preceptor needs to rectify the deficiency before the preceptor can declare completion.

When all components have been adequately addressed, the preceptor will be prompted to sign an online declaration when the Complete button is clicked. The online declaration requires the preceptor to affirm the intern has achieved an acceptable level of competence in the competencies identified for the specified personal licence class.

If the intern requires additional time to achieve the minimum level of competence, please contact the regulator to arrange for an extension of internship privileges.

A signed online declaration requires the:

- Preceptor Name
- Intern Name
- Internship Start Date
- Date of Completion of Competence

# Internship Support Portal – Instruction Manual

When the declaration has been completed by the preceptor, the intern will receive notification on the Notice Board. A copy of the signed online declaration will also appear on the preceptor's Notice Board. Submission of the signed online declaration is automatically transmitted to the accredited educational institution to confirm submission of all required assignments and eligibility for graduation from the Funeral Service Education Program.

When confirmation of the intern's competence has been declared by the preceptor and the accredited educational institution has verified eligibility for graduation from the Funeral Service Education Program, the regulator is notified through the *Internship Support Portal*.

Interns must continue to complete and upload one *BOFS Report* for each embalming, preneed arrangement, and at need arrangement conducted or funeral directed, as applicable to the personal licence class, until a personal licence is issued.

Once a personal licence has been issued to the intern, information on the *Internship Support Portal* is transferred to the online *AIM Support Tool* providing an option for continued reference as a licensed funeral professional.

# **Intern Instructions**

## Intern: Quick Reference Guide

The intern launches access for the preceptor by first logging into the *Internship Support Portal*. Preceptors cannot complete the required initial assessment of the intern until this step is complete.

Login Details:

- [https://www2.skilsure.net/skilsure\\_bofs\\_interns/](https://www2.skilsure.net/skilsure_bofs_interns/)
- Username: Registration Number
- Password: Registration Number + last name (all lower case)

To obtain a forgotten password, click ‘Forgot Password’ and the information will be forwarded to the email address on file with the regulator.

### **Initial Assessment** (Beginning of Internship Term)

Connect with the preceptor who will conduct an initial assessment aimed at determining a current level of the intern’s competence during the first two weeks of internship. Investing the time to understand the process and conduct a thorough assessment from the outset will provide a solid foundation for learning opportunities and tracking progress throughout the internship term.

### **Ongoing Assessment of Competence** (Approximately one time per month)

Commit to an ongoing assessment of competence with the preceptor to review submissions on a monthly basis and assign current Levels of Achievement.

### **Documentation Submissions** (Approximately one time per week)

Access Tab: Documentation on the *Internship Support Portal* approximately one time per week to submit Competency Achievements and BOFS Reports.


## Tab: Notice Board


The opening screen is the Notice Board. Each time the preceptor responds to a submission, the intern will be notified on the Notice Board.

Submissions that have been reviewed by the preceptor will be either ‘accepted’ or ‘rejected’. Rejected submissions need to be reviewed by the intern for correction.

To receive an email each time a notice is posted on the Notice Board click the box requesting “I would like to receive email notifications as well”.

### Notice Board


 ☐ I would like to receive e-mail notifications as well


 15-Jan-2016 at 12:44 pm

Documentation that you have submitted has been reviewed

Evidence title : test

Status : Accepted


 [Mark as Read](#)


 15-Jan-2016 at 12:43 pm

Documentation that you have submitted has been reviewed

Evidence title : test

Status : Accepted


 [Mark as Read](#)


 15-Jan-2016 at 10:02 am

Documentation that you have submitted has been reviewed

Evidence title : test

Status : Accepted


 [Mark as Read](#)

 15-Jan-2016 at 10:02 am

Documentation that you have submitted has been reviewed

Evidence title : test

Status : Under Review/Changes Required

 [Mark as Read](#)

Screenshot – Tab: Notice Board

## Tab: My Progress

The Tab: My Progress provides details about current Levels of Achievement that have been assigned by the preceptor.

The information appears on the dropdown menu under either:

- By Area or
- By Competency

Information provided Tab: My Progress is static meaning the intern cannot make any changes.

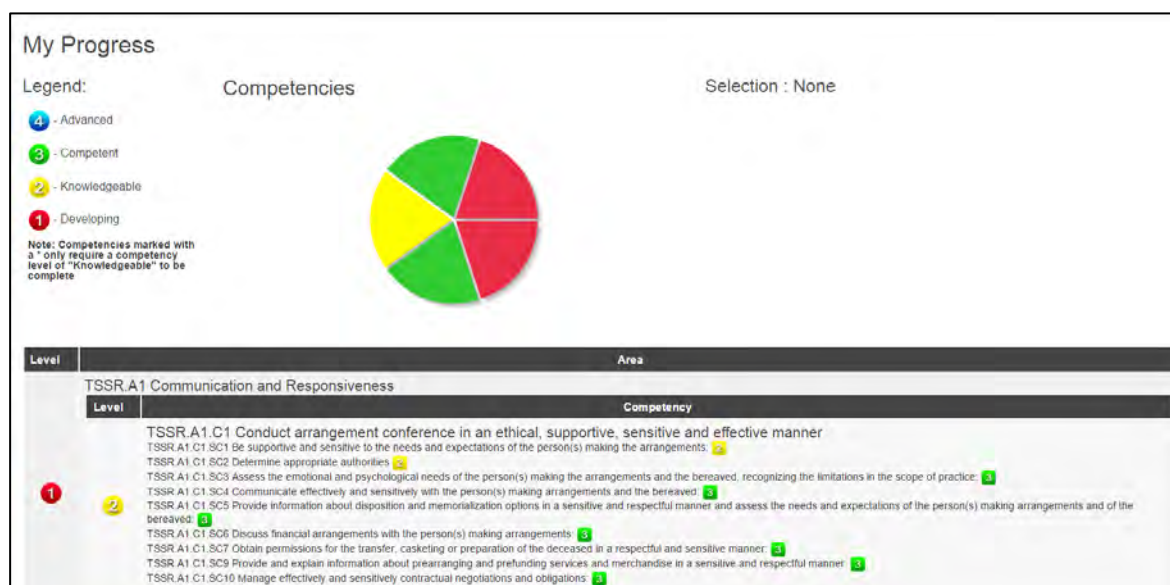
### By Area

The pie chart provides an outline of the intern's progression in each Area (A). Prior to the initial assessment being conducted all pieces of the pie chart will be grey. Once the initial assessment is completed by the preceptor, colours will be added to the pie chart which reflect the Level of Achievement that has been assigned.

The preceptor may assign one of four Level of Achievements:

- 1: Developing (red)
- 2: Knowledgeable (yellow)
- 3: Competent (green) or
- 4: Advanced (blue)

For each Area (A) the Level of Achievement that has been assigned to each Competency (C) and Sub-competency (SC) is displayed.



Screenshot – My Progress – By Area



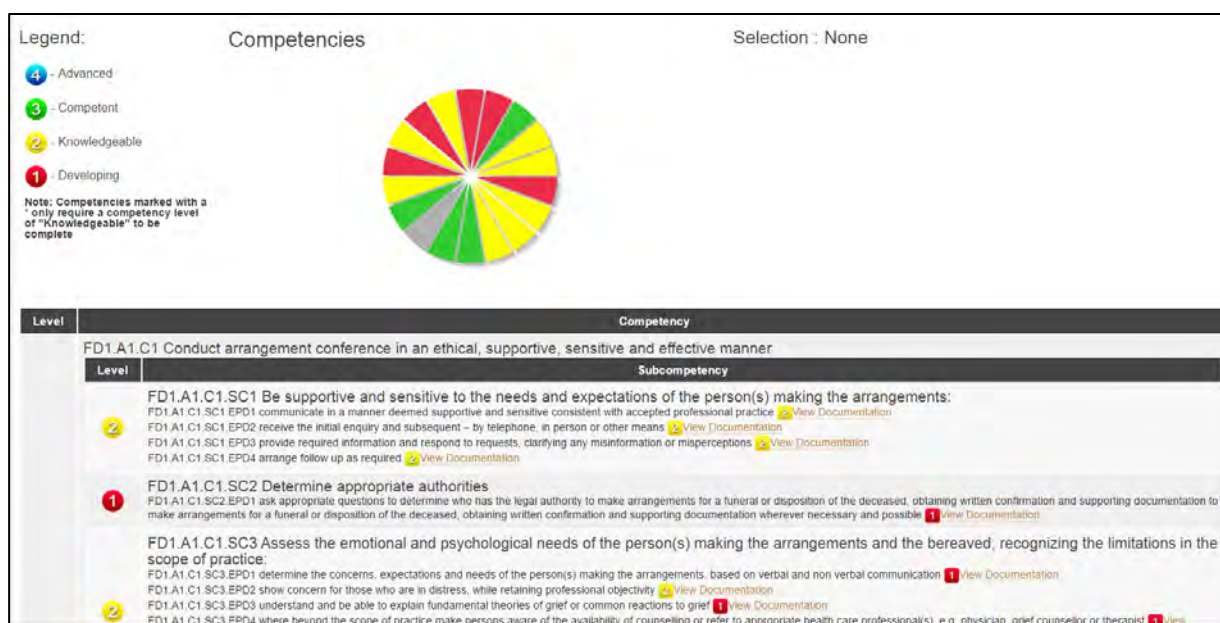
## By Competency

The pie chart provides an outline of the intern's progression in each Competency (C) and Sub-competency (SC). Prior to the initial assessment being conducted, all pieces of the pie chart will be grey. Once the initial assessment is complete, colours will be added to the pie chart which reflects the Level of Achievement that has been assigned by the preceptor.

Below the pie chart each component of the individual Competencies (C) and Sub-competencies (SC) is displayed in a list format. A dropdown menu for the Level of Achievement is provided for each Competency (C) and Sub-competency (SC).

Below the each Sub-competency (SC) the respective Expected Performances to Demonstrate (EPD) are identified. To the right of each Expected Performance to Demonstrate (EPD), the current Level of Achievement that has been assigned is indicated. Competency Achievements, related to each Expected Performance to Demonstrate (EPD) may be viewed by clicking View Documentation.

As the Screenshot: By Competency indicates, a view of the Competency (C), Sub-competency (SC) and Expected Performances to Demonstrate (EPD) is provided.



Screenshot – My Progress – By Competency

The View Documentation button appears beside each Expected Performance to Demonstrate (EPD) and provides a link to the Document Submission Overview which includes the option to view documentation as either:

- Reviewed Documents
- Not Reviewed Documents

In addition, the document title, submission date, and document status (accepted or rejected) also appear.

To view details related to a specific submission, click on the document title. The information that follows shows the full document submission, including the Level of Achievement that has been assigned by the preceptor to each Expected Performance to Demonstrate (EPD).

If a number does not appear beside the Expected Performance to Demonstrate (EPD), the intern has not reported having completed the Expected Performance to Demonstrate (EPD) or a Level of Achievement has not been assigned to the submission by the preceptor.

## Tab: Documentation

The Tab: Documentation includes a dropdown menu that allows the intern to:

- Submit Documentation or
- View Documentation

### Submit Documentation

Under the heading Submit Documentation, the intern provides information for review by the preceptor in the form of either:

- Competency Achievements or
- BOFS Reports

### Competency Achievements

Competency Achievements provide a detailed overview of each Competency (C), Sub Competency (SC) and Expected Performance to Demonstrate (EPD) as found in the *BOFS Funeral Sector Professional Competency Profile – Second Edition*.

To prepare a Competency Achievement reflect on a task that was recently completed which applies to one or more of the Expected Performances to Demonstrate (EPD). Approach the data input task as a learning journal entry by completing the following fields:

#### Document Title

Assign a title that clearly identifies the information being reported; similar to a subject line for an email.

#### Supervising Funeral Professional

Insert the name of the individual who supervised the activity being reported. This person may be a licensed funeral professional or an expert in another capacity that supports the profession (e.g. administrative assistant, hospital employee, police officer or coroner). The field is required to provide the preceptor with a point of reference to confirm the intern's Level of Achievement.

#### Establishment

Insert the name of the licensed establishment at which the reported activities were conducted. The field is required to provide the preceptor with a point of reference to confirm the intern's Level of Achievement. In some instances the name of the funeral establishment will not change.

#### Document Location (optional)

To upload files stored in One Note or Dropbox, click the box provided.

## Document Files (optional)

To insert files to support Competency Achievements, click the 'Upload Files' button and select the appropriate document or image. Ensure files being uploaded comply with privacy legislation and funeral establishment policies and procedures.

## Description

Provide a detailed description of the Competency Achievement. Capture the essence of the learning being reported, in a comprehensive paragraph or several bullet points. Ensure adequate details are provided to support the preceptor's fair assessment of the Level of Achievement.

## EPD/Sub-competency List

To expand the list click the plus (+) box and check the Expected Performances to Demonstrate that apply to the Competency Achievement being reported.



Screenshot: Documentation Submission – Competency Achievements

It is not expected that all Expected Performances to Demonstrate (EPD) will be addressed each week. Instead the intent is to report weekly on specific learning obtained over the course of the internship term.

For additional information on the development of Competency Achievements refer to the Scenarios page in this publication.

## Save

Once the Competency Achievement entry is complete, click the Save button to submit documentation for assessment by the preceptor.

If the preceptor rejects the submission, the intern is responsible for replacing the Competency Achievement with a new entry.

## BOFS Reports

*BOFS Reports* must be completed by the intern for each embalming, preneed arrangement, at need arrangement and funeral directed until a personal licence is issued. Completed *BOFS Reports* must be uploaded in the appropriate Report Category.

### Document Title

Assign a title to the document that clearly identifies the information being reported (e.g. BOFS Embalming Reports – 1-8).

### Supervising Funeral Professional

Insert the name of the licensed funeral professional who supervised the activity being reported. The field is required to provide the preceptor with a point of reference to confirm the intern's level of achievement.

### Establishment

Insert the name of the licensed establishment at which the reported activities were conducted. The field is required to provide the preceptor with a point of reference to confirm the intern's level of achievement. In some instances the name of the funeral establishment will not change.

### Document Location (optional)

To upload *BOFS Reports* stored in One Note or Dropbox, click the box provided.

### Document Files (optional)

To insert *BOFS Reports*, click the 'Upload Files' button and select the appropriate document or image. Ensure files being uploaded comply with privacy legislation and funeral establishment policies and procedures.

### Report Category

*BOFS Reports* must be uploaded in the appropriate file depending on the personal licence class which may include:

- *BOFS Embalming Reports*
- *BOFS At Need Reports*
- *BOFS Preneed Reports*
- *BOFS Funeral Directing Reports*

Template of each *BOFS Report* is available in the Resources tab.

For ease of review by the preceptor, ensure different categories of reports are submitted separately (e.g. *BOFS Embalming Reports* are not scanned and uploaded in a file with *BOFS At Need Reports*).

*BOFS Reports* from the same category may be uploaded in small batches. Ensure the file is appropriately named (e.g. BOFS Embalming Reports 1-8).

## View Documentation

Under the heading View Documentation, the intern can review information that has been submitted for review and assessed by the preceptor as either:

- Competency Achievements or
- BOFS Reports

## Competency Achievements

Click Competency Achievements on the dropdown menu located under the heading View Documentation to view all competency achievements submitted to the preceptor.

To view Competency Achievements that have been submitted to the preceptor for assessment, click the individual 'Documentation Title'. The information provided is a comprehensive list of all submitted Competency Achievements.

Components that have not been addressed are identified with text that indicates “No documents accepted against this competency”.

## BOFS Reports

Click BOFS Reports on the dropdown menu located under the heading View Documentation to view all *BOFS Reports* submitted to the preceptor. BOFS Reports are listed by category (embalming, pre need arrangements, at need arrangements, and funeral directing).

To view BOFS Reports that have been submitted to the preceptor for assessment, click the individual 'Documentation Title'. *BOFS Reports* that have been accepted by the preceptor will appear under View Documentation.

In the event that an error has been made, *BOFS Report* submissions may be edited. To edit the category, or information on a *BOFS Report*, click the Edit button.

## Tab: Resources

The Tab: Resources provides information to support interns and preceptors which includes *BOFS Reports*, the *BOFS Funeral Sector Professional Competency Profile – Second Edition*, legislative links, commonly asked questions and answers, the *Success Passport* for each personal licence class and the *Introduction to Embalming*, *Introduction to the Arrangement Conference*, *Introduction to Funeral Directing*.

## Tab: Competency Profiles

The Tab: Competency Profiles contains information found in the BOFS Funeral Sector Professional Competency Profile – Second Edition.

Click “Expand All Competencies” to view the Areas (A), Competencies (C), Sub-competencies (SC) and Expected Performances to Demonstrate (EPD) according to specified personal licence class.

Information in the Tab: Competency Profiles is static and provided only as a point of reference.

## Technical Support

For email technical support, make changes to your password, or to sign out, click the Wheel Cog located in the top right hand corner of the screen.



## Declaring Competence

The preceptor is responsible for the fair assessment of an intern's competence.

An intern must be declared competent in all identified competencies for the specified personal licence class, prior to being eligible to graduate from an approved Funeral Service Education Program at an accredited educational institution in Ontario. Graduation from a Funeral Service Education Program deems the individual to be eligible to write the provincial entry to practice examinations offered by the regulator.

To declared competence, the intern must have achieved a minimum level of 3: Competent (green), or as denoted by an asterisk (\*), a minimum level of 2: Knowledgeable (yellow), in each Area (A), Competency (C), Sub-competency (SC), and Expected Performance to Demonstrate (EPD). All information must be recorded on the *Internship Support Portal*.

When the minimum level of competence is both achieved and reported, and the preceptor is comfortable with declaring the intern to be competent, the preceptor is responsible for advising the accredited educational institution and the regulator through the *Internship Support Portal* by clicking the 'Complete' button located on the Tab: Intern Progress.

If the intern requires additional time to achieve the minimum level of competence, please contact the regulator to arrange for an extension of internship privileges.

When the declaration has been completed by the preceptor, the intern will receive notification on the Notice Board. A copy of the signed online declaration will also appear on the preceptor's Notice Board.

Submission of the signed online declaration is automatically transmitted to the accredited educational institution to confirm submission of all required assignments and eligibility for graduation from the Funeral Service Education Program.

When confirmation of the intern's competence has been declared by the preceptor and the accredited educational institution has verified eligibility for graduation from the Funeral Service Education Program, the regulator is notified through the *Internship Support Portal*.

Interns must continue to complete and upload one *BOFS Report* for each embalming, preneed arrangement, and at need arrangement conducted or funeral directed, as applicable to the personal licence class, until a personal licence is issued.

Once a personal licence has been issued to the intern, information on the *Internship Support Portal* is transferred to the online *AIM Support Tool* providing an option for continued reference as a licensed funeral professional.



## Scenarios

Following completion of the initial assessment, it is important for the intern and preceptor to meet approximately one time per month to discuss overall progress.

In addition, it is imperative that both the intern and preceptor connect at least one time per week via the *Internship Support Portal* to submit and review documentation. Collectively throughout the week, both the intern and the preceptor need to invest a maximum of approximately one hour per week.

To support the success of the intern, it is important to identify a specific focus (e.g. embalming, arrangements or transfers) and set a learning goal each week. Investing the time to do so will serve to clarify focused competency achievements at the end of the week.

For example:

**Specific Focus:** Embalming

**Learning Goal:** To improve restoration techniques on deceased remains.

**Learning Outcome:** The intern is primarily focused on embalming. As the week unfolds, the intern is afforded an opportunity to embalm five deceased remains; four of which progress as planned. The fifth case however requires extensive restoration and techniques that have not been needed in the past. As a result, the intern's level of learning is enhanced.

**Competency Achievement:** Reflecting on the events of the week, the intern reports a Competency Achievement that is focused on learning obtained during the fifth embalming.

**Specific Focus:** Preneed Arrangements

**Learning Goal:** To conduct preneed arrangements with consumers from different cultural backgrounds.

**Learning Outcome:** The intern is primarily focused on serving consumers in a preneed capacity. As the week unfolds, the intern is provided with three opportunities to conduct preneed arrangements. Two of the consumer's request direct cremation. The third consumer makes preneed arrangements that require embalming, a full church service with extensive detail for personalization, and burial.

**Competency Achievement:** Reflecting on the events of the week, the intern reports a Competency Achievement that is focused on learning obtained during the third preneed arrangement.

Applying an approach consistent with the examples above will help the intern to focus their ongoing efforts. It is not expected that the intern will submit Competency Achievements for each component of the *Internship Support Portal* on a weekly basis. Instead regular reports serve to demonstrate progressive learning throughout the internship term.



# **Questions & Answers**

## Questions and Answers

### **When does a preceptor need to meet with the intern to conduct an initial assessment of the intern's competence?**

The preceptor needs to conduct an initial evaluation of the intern's competence within the first two weeks of internship. At this time, it is expected that a Level of Achievement will be assigned to each Area (A), Competency (C) and Sub-competency (SC). This process helps to set expectations and identify learning objectives throughout the internship term.

### **How often do the preceptor and intern need to meet throughout the internship term to discuss Competency Achievements?**

The *Internship Support Portal* is intended to serve as a tool to report Competency Achievements; the portal however does not replace the importance of the preceptor and intern connecting regularly to discuss progress and set future learning objectives.

While it is important to ensure that Competency Achievements are reported and reviewed on a weekly basis, the preceptor and intern need to set aside time at least one time per month to re-assess the intern's Level of Achievement in each Area (A), Competency (C) and Sub-competency (SC).

Recognizing that learning will progress over time, it is expected that the intern will have achieved a minimum Level of Achievement of 3: Competent (green) by the end of the internship term. Components marked by an asterisk (\*) denote a minimum Level of Achievement of 2: Knowledgeable - 2 as being acceptable.

### **How often does the intern need to report Competency Achievements on the *Internship Support Portal*?**

Competency Achievements need to be reported on the *Internship Support Portal* a minimum of one time per week.

### **What may be used as documentation of a Competency Achievement?**

The intent behind document uploads is to provide further evidence that serves to demonstrate or support the Competency Achievement. While there are numerous possibilities, documents may include: a first call sheet, embalming room inventory, personal effects list, or before and after photos of grounds, etc. In all instances it is important to ensure the intern is complying with privacy legislation and funeral establishment policies and procedures.

### **Do each Area (A), Competency (C) and Sub-competency (SC) and Expected Performance to Demonstrate (EPD) need to be reviewed each week?**

No, all identified competencies for the specified personal licence class do not need to be reviewed each week. The intent is not to use the *Internship Support Portal* as a checklist. Instead it is expected that the intern will set a learning goal for the week based on areas that require attention, complete activities throughout the week, and record learning outcomes at the end of the week. For additional information on reporting Competency Achievements refer to the Scenarios page located in this publication.

### **Are document uploads required for every Competency Achievement?**

Document uploads serve to support an intern's learning. Choosing to include a document or certificate helps to highlight the Competency Achievement however, uploads are not required in all instances.

Preceptors and interns are encouraged to work together to collaborate on which components are best supported by document uploads.

### **How often does the preceptor need to access the *Internship Support Portal*?**

The preceptor is responsible for assessment of the intern's competence throughout the internship term. As a result, the preceptor needs to access the *Internship Support Portal* at a minimum one time per week. Preceptors can click "I would like to receive email notifications as well" on the Notice Board to receive an email notification when the intern has reported a Competency Achievement or uploaded a *BOFS Report*.

### **How is an intern's level of competency determined if the Levels of Achievement on Expected Performances to Demonstrate (EPD) are at varying levels?**

The overall Level of Achievement for each Area (A), Competency (C), or Sub-competency (SC) is determined by the preceptor. For instance, if each Expected Performance to Demonstrate (EPD) has been assessed by the preceptor and assigned a Level of Achievement of 4: Advanced (blue), the preceptor may deem the intern's overall competency in the Sub-competency (SC) or Competency (C) to be 2: Knowledgeable (yellow).

Throughout the internship term each component is assigned a Level of Achievement independently of the whole. It is important however for the preceptor to refer to levels previously assessed before deciding on the overall Level of Achievement.

### **How often does the intern need to upload *BOFS Reports* to the *Internship Support Portal*?**

*BOFS Reports* need to be uploaded to the *Internship Support Portal* at a minimum one time per week.

### **Where do I find *BOFS Reports*?**

Templates of the *BOFS Reports* for embalming, preneed arrangements, at need arrangement and funeral directing can be downloaded by from the Tab: Resources page of the *Internship Support Portal*.

### **What are *BOFS Embalming Reports*?**

Funeral Director – Class 1 Interns are required to complete one *BOFS Embalming Report* for each embalming performed until a personal licence is issued.

All *BOFS Embalming Reports* must be signed by the Funeral Director – Class 1 Intern, Supervising Funeral Director and Assigned Preceptor. If the Assigned Preceptor and Supervising Funeral Director are one and the same, the Assigned Preceptor is required to sign in both places.

Signed copies of completed *BOFS Embalming Reports* must be uploaded to the intern's "Documentation – By Reports" in the appropriate folder and accepted by the preceptor.

### **What are *BOFS Preneed* and *At-Need Reports*?**

All registered interns are required to complete one *BOFS Preneed Report* or one *BOFS At-Need Report* for each preneed or at-need arrangement conducted prior to a personal licence being issued.

# Internship Support Portal – Instruction Manual

All *BOFS Preneed Reports* and *BOFS At-Need Reports* must be signed by the Intern, Supervising Funeral Professional and Assigned Preceptor. If the Assigned Preceptor and Supervising Funeral Director are one and the same, the Assigned Preceptor is required to sign in both places.

Signed copies of completed *BOFS Preneed Reports* and *BOFS At-Need Reports* must be uploaded to the intern's "Documentation – By Reports" in the appropriate folder and accepted by the preceptor.

## **What are *BOFS Funeral Directing Reports*?**

Funeral Director – Class 1 Interns are required to complete one *BOFS Funeral Directing Report* for each funeral directed or observed until a personal licence is issued.

All *BOFS Funeral Directing Reports* must be signed by the Intern, Supervising Funeral Director and Assigned Preceptor. If the Assigned Preceptor and Supervising Funeral Director are one and the same, the Assigned Preceptor is required to sign in both places..

Signed copies of completed *BOFS Funeral Directing Reports* must be uploaded to the intern's "Documentation – By Reports" in the appropriate folder and accepted by the preceptor.

## **What is the minimum number of *BOFS Reports* that must be completed throughout the internship term?**

The introduction of a competency-based training model eliminated the requirement for an intern to complete a minimum number of *BOFS Reports* for embalming, preneed arrangements, at need arrangements and funerals directed. Instead the competence level of the intern is assessed by the preceptor. The intern however is still responsible for completing one *BOFS Report* for each embalming, preneed arrangement, and at need arrangement conducted and funeral directed until a personal licence is issued.

## **What is the *BOFS Funeral Sector Professional Competency Profiles – Second Edition*?**

The *BOFS Funeral Sector Professional Competency Profiles – Second Edition* provides the foundation for all funeral service education initiatives in Ontario. Competencies identified in the competency profile for each personal licence class are consistent with the information presented on the *Internship Support Portal*. The *BOFS Funeral Sector Professional Competency Profiles – Second Edition* can be found on the *Internship Support Portal* under Competency Profiles.

## **What if an intern's documentation is not accepted?**

Each time the intern submits documentation for review by the preceptor, notification is provided on the preceptor's Notice Board. The preceptor is responsible for accepting or rejecting the submission. Rejected submissions must be promptly addressed by the intern.

## **Can submitted documentation be edited by the intern?**

The intern can view documentation previously submitted by opening the Competency Achievement or *BOFS Report* under the Tab: Documentation, and clicking on View Documentation. Competency Achievements which have submitted can be deleted using the Delete button but editing the information is not possible. *BOFS Reports* may be edited using the Edit button which allows the intern to make changes including any required field, dropdown to report category, or attachment.

## **Why are interns expected to learn components listed as Owner/Manager?**

Over the course of the internship term, it is expected that the intern will receive training in all competencies for the specified personal licence class. While the components listed under Owner/Manager may not pertain specifically to the role of the intern, it is expected that the intern will obtain a level of knowledge of all elements, ultimately preparing them for a career in funeral service.

## **How are changes of internship status reported to the regulator?**

Changes of internship status including transfer to another establishment, the assignment of a different preceptor, or termination of employment must be immediately reported to the accredited educational institution and the regulator.

The preceptor is responsible for ensuring that entries on the *Internship Support Portal* are accurate and complete. Prior to changes of internship status being confirmed, the preceptor must conduct an assessment of current Competency Achievements and ensure all entries are either accepted or rejected. Additionally, all BOFS Reports must be completed and uploaded in the appropriate folder on the *Internship Support Portal*.

Once changes to internship status have been processed by the regulator, access to the *Internship Support Portal* will be terminated for both the intern and preceptor. In instances where changes to internship status are made during the internship term, intern access to the portal will be reinstated and privileges assigned to the new preceptor.

## **How do I stop receiving emails of notices?**

Both the intern and preceptor have the option of receiving notices via email. To stop receiving email notices unclick the box “I would like to receive email notifications as well” on the Notice Board.

## **When can an intern be declared competent?**

The preceptor is responsible for declaring the intern to be competent at the end of the internship term. To learn more about declaring an intern to be competent, refer to the Declaring Competence section located in this publication.

## **Can an intern continue to work in the capacity of an intern after they have been declared competent?**

Yes, an intern can continue to work in the capacity of an intern after they have been declared competent provided the regulator has been notified with the submission of Change of Internship Status documentation by fax or email/scan.

## **Is it acceptable for a preceptor to confirm a Level of Achievement if they have not personally witnessed the task being completed?**

Throughout the internship term, the preceptor is responsible for ensuring that the intern receives proper training in each of the identified competencies for the specified personal licence class; a task that may involve input from a number of team members with various areas of focus or specialty (e.g. embalming, preneed arrangements, at need arrangements, and administration). As a result, it is acceptable for a preceptor to confirm a Level of Achievement if they have connected with the individual who witnessed completion of the task to discuss the intern’s involvement and the learning that occurred.



## Glossary

**Assigned Preceptor:** a licensed funeral professional who has completed the Preceptor Training Program and agreed to train the intern.

**At Need [arrangement]:** the time immediately following the death of an individual when funeral services are needed, short for “at the time of need.”

**Clearing [a funeral]:** funeral sector terminology used to describe finalizing details of the funeral.

**Competency Achievements:** an activity completed by a registered intern to demonstrate competence during the internship term and reported on the *Internship Support Portal*.

**Disbursements:** a payment made by a funeral professional or a person who operates an establishment on behalf of a purchaser of services or supplies, or both.

**Disposition:** a disposal method of deceased remains (e.g., cremation, interment, resomation or entombment).

**Documentation:** Competency Achievements and *BOFS Reports* which demonstrate a level of achievement of identified competencies on the *Internship Support Portal*.

**Embalming:** the preservation and disinfection of all or part of deceased remains by means other than by refrigeration. The procedure of embalming refers to removing the blood and body fluid from the deceased remains and replacing it with a chemical preservative.

**Funeral:** a rite or ceremony in connection with the death of a person where the body is present.

**Funeral Services:** the care and preparation of deceased remains and the co-ordination and provision of rites and ceremonies with respect to the individual which does not include cemetery or crematorium services.

**Level of Achievement:** the degree of competence of an intern as assessed by a trained preceptor for each identified competency for the specified personal licence class.

**Preneed [arrangement]:** An arrangement for the provision of specific funeral services, supplies or transportation of a dead human body on the death of a person who is alive at the time the arrangement is made

**Prepayment:** The payment or the guarantee of a payment pursuant to a prepaid contract.

**Prepayment Funds:** The money deposited in trust under the provisions of the Act and the income therefrom and includes the proceeds of an insurance policy received by a licensee.

**Provider/Service Provider:** An operator of a cemetery, crematorium, funeral establishment or transfer service

**Purchaser:** A person who has accepted financial responsibility under a funeral service contract.

**Recipient:** A person for whom funeral services or supplies, or both, are to be provided under a contract or prepaid contract

**Services:** Funeral, visitation, opening and closing of a grave, and cremation.

**Ship Out (Repatriation):** Sending the body of a dead human back to their country of origin.

**Supervising Funeral Director:** Licensed funeral director who was present at the time of arrangement referred to in the intern’s report

**Supplies:** Caskets, markers and monuments, vaults, urns and flowers.

**Transfer Service:** A service to the public with respect to the disposition of dead human bodies, including the transportation of dead human bodies and the filling out of necessary documentation with respect to the disposition of dead human bodies.