



Contractor Instructions for *Link2CDMS* Contractor Document Management System

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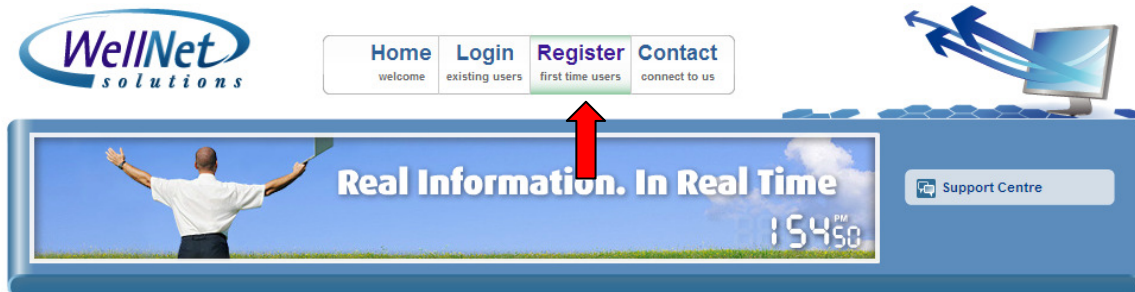
Contractor Instructions for Link2CDMS

Getting Started

When you first access the Link2CDMS contractor page, you'll see a navigation toolbar across the top.

1. If this is **your first time** accessing the Link2CDMS system, click on the **REGISTER** button. You will need to enter:
 - Your Affiliate ID (as provided by the company to which you will be supplying work/services)
 - An email address at which you will receive updates and information about your approval status
 - A password.

Then click **Register**.



Register

Affiliate ID:

Email:

Password:



- If you have **previously created an account** on Link2CDMS click on the **LOGIN** button. You will need to enter:
 - Your Affiliate ID (as provided by the company to which you will be supplying work/services)
 - The email address which you previously used to register your account
 - Your account password.

Then click **Login**.

Viewing Your Qualification Dashboard

Clicking on the **Dashboard** tab provides access to an overview of your status as it relates to being a qualified supplier of contracted services.

The screenshot shows the WellNet solutions dashboard. At the top, there is a navigation bar with 'Home', 'Service Center', and 'Logout' buttons. Below this, there are three tabs: 'Dashboard', 'Company Profile', and 'Account'. The 'Dashboard' tab is selected, and a red arrow points to the 'Company Profile' status, which is 'Incomplete'. Below this, a table lists various qualification requirements, each with a 'Response Required' link in the right-hand column.

Responses are required for the following items	
Field Name	
Address	Response Required
Alternate Name/Doing Business As:	Response Required
Are activities to be conducted on site by the contractor deemed critical safe work or construction?	Response Required
City	Response Required
Company Description	Response Required
Company Name	Response Required
Do you have a disciplinary policy for safety infractions?	Response Required
Does your company engage in periodic safety inspections?	Response Required
Does your company engage in promoting zero incidents and injuries?	Response Required
Does your company have a formal system for employee feedback regarding safety concerns	Response Required
Does your company have a formal system for tracking and closure of employee related safety concerns that is reported to senior management?	Response Required
Does your company have a Job hazard analysis or Job Safety Analysis form to be completed for tasks?	Response Required
Has the contractor received any EHS governmental convictions or charges received in the previous three (3) years	Response Required
Have you had any serious incidents and injuries in the last three years	Response Required
If so what % of employees are involved in inspections / observations process?	Response Required
If you answered yes how often has it been used in the last three years?	Response Required
If your company has a formal system for tracking and closing accidents investigations and corrective actions, what percentage of these items	Response Required

If you click on any of the **Response Required** links in the right-side column you will be presented with a separate page where you can provide the appropriate information for that specific qualification requirement.

Near the bottom of the page you can see a log of your activity on the Link2CDMS system, as well as an 'export' button that provides a report of your logged activity.

Secondary Contact Email	Response Required
Secondary Contact Fax	Response Required
Secondary Contact Name	Response Required
Secondary Contact Phone	Response Required
Secondary Contact Title	Response Required
What % of time spent by supervision in field related to safety	Response Required
Which site do you intend to work on?	Response Required
Will the contractor be performing any of the following tasks?	Response Required
	
Log Date	Log Message
December 9, 2013 12:12 PM	Accepted APOC H&S Agreement
December 9, 2013 12:11 PM	Registered

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Submitting Company Profile Information

You can enter or update information about your company by clicking on the **Company Profile** tab. This page contains the same information requested on the **Dashboard** view, so your qualification status will be updated accordingly when you enter information here.

Items marked with a red asterisk (*) are mandatory fields. After entering any information remember to click **Save Profile**.

The screenshot shows a web application interface for submitting company profile information. At the top, there are three tabs: 'Dashboard' (Overview), 'Company Profile' (Company Information), and 'Account' (manage login credentials). Below the tabs, there are four sub-sections: 'Company Information', 'EHS Requirements', 'Document Upload', and 'Employee List'. The 'Company Information' section is active and contains several input fields, each marked with a red asterisk (*): 'Company Name', 'Alternate Name/Doing Business As:', 'Address', 'Postal Code', 'City', and 'Province/State' (a dropdown menu with options: Ontario, Alberta, British Columbia, Manitoba). To the right of these fields is a large text area for 'Company Description'. Below this is the 'Primary Contact' section with fields for 'Primary Contact Name', 'Primary Contact Title', 'Primary Contact Phone', 'Primary Contact Fax', and 'Primary Contact Email'. The 'Secondary Contact' section has fields for 'Secondary Contact Name', 'Secondary Contact Title', 'Secondary Contact Phone', 'Secondary Contact Fax', and 'Secondary Contact Email'. A 'Save Profile' button is located in the top right corner, with a red arrow pointing to it.

Additional tabs in this section include the [EHS Requirements](#) page which presents information required by the specific employer as it relates to contractor health and safety practices and history.

Dashboard Overview **Company Profile** Company Information **Account** manage login credentials

Company Information **EHS Requirements** Document Upload Employee List

Save Profile

EHS Requirements

Number of employees 0 1-7 8-25 26-50 > 50

Are activities to be conducted on site by the contractor deemed critical safe work or construction? Critical safe work Construction N/A

Has the contractor received any EHS governmental convictions or charges received in the previous three (3) years If Yes, please explain:

Have you had any serious incidents and injuries in the last three years If Yes, please explain:

If your company has a formal system for tracking and closing accidents investigations and corrective actions, what percentage of these items 0-10 11-25 26-50 51-100 No system in place

The [Document Upload](#) tab presents an interface page where you can submit required documents as part of the qualification process. The expected documents will be listed, as well as a field to specify the certification expiry date for any documents that you upload.

Dashboard
Overview

Company Profile
Company Information

Account
manage login credentials

Company Information

EHS Requirements

Document Upload

Employee List

Document Upload

Evidence of workers compensation insurance File Successfully Uploaded No file chosen

*

Current workers compensation insurance documents

Certificate of Insurance coverage Choose File No file chosen

*

Current certificate of insurance coverage

Safety policy Choose File No file chosen

You can add employees to your company profile by accessing the **Employee List** tab and selecting *Add Employees*. This will help the organization who will be contracting work from you to know who needs to be included as part of the qualification process.



Dashboard Overview | **Company Profile** Company Information | Account manage login credentials

Company Information | EHS Requirements | Document Upload | **Employee List**

Save Profile

+ Add Employees

First Name	Last Name	Title	Email	Completed Contractor Orientation
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

No Employees have been added to your company profile.

Updating Your Password

You can update your account's password by clicking on the **Account** tab.

Dashboard Overview | Company Profile Company Information | **Account** manage login credentials

Set a new account password.

Email:

Password:

Save

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You can also reach us directly at: support@link2cdms.com.

Thank you for using the Link2CDMS Contractor Document Management System!