



Contractor Instructions for *Link2CDMS* Contractor Document Management System

Table of Contents

Getting Started	2
Viewing Your Qualification Dashboard	3
Submitting Company Profile Information	4
Updating Your Password	9



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**.

A screenshot of the Link2CDMS contractor registration page. At the top left is the 'wellnet solutions' logo. To its right is a navigation toolbar with four buttons: 'Home' (with 'welcome' below it), 'Login' (with 'existing users' below it), 'Register' (with 'first time users' below it), and 'Contact' (with 'connect to us' below it). A red arrow points to the 'Register' button. To the right of the navigation bar is a graphic of a computer monitor with blue arrows pointing away from it. Below the navigation bar is a large banner with a background image of a man in a white shirt standing with his arms raised in a field. The banner contains the text 'Real Information. In Real Time' and a digital clock showing '1:54:50 PM'. A 'Support Centre' button is located in the bottom right corner of the banner. Below the banner is a registration form titled 'Register' with three input fields: 'Affiliate ID:', 'Email:', and 'Password:'. A 'Register' button is located at the bottom of the form.

- 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 qualification dashboard. At the top, there are navigation links for Home, Service Center, and Logout. Below these are tabs for Dashboard, Company Profile, and Account. A red arrow points to the 'Company Profile' tab, which has a status of 'Incomplete'. Below this is a table listing various qualification requirements, each with a 'Response Required' link.

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

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](#).

Dashboard
Overview
Company Profile
Company Information
Account
manage login credentials

Company Information
[EHS Requirements](#)
[Document Upload](#)
[Employee List](#)

Company Information

Company Name *

Alternate Name/Doing Business As: *

Address *

Postal Code *

City *

Province/State

- Ontario
- Alberta
- British Columbia
- Manitoba

Company Description

Primary Contact

Primary Contact Name * Primary Contact Title *

Primary Contact Phone * Primary Contact Fax *

Primary Contact Email *

Secondary Contact

Secondary Contact Name Secondary Contact Title

Secondary Contact Phone Secondary Contact Fax

Secondary Contact Email

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

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.

The screenshot shows a web application interface with a blue header bar. Below the header, there are three main navigation tabs: 'Dashboard' (Overview), 'Company Profile' (Company Information), and 'Account' (manage login credentials). Under the 'Company Profile' tab, there are four sub-tabs: 'Company Information', 'EHS Requirements', 'Document Upload', and 'Employee List'. The 'Document Upload' sub-tab is active. In the top right corner of the main content area, there is a 'Save Profile' button. The 'Document Upload' section is titled 'Document Upload' and contains three document upload forms. The first form is for 'Evidence of workers compensation insurance'. It shows a green status 'File Successfully Uploaded' and a 'Choose File' button with the text 'No file chosen'. Below this is a 'Document Expiry Date' input field with a red asterisk, and an 'Upload' button. Below the form is a text box containing the text 'Current workers compensation insurance documents'. The second form is for 'Certificate of Insurance coverage'. It shows a 'Choose File' button with the text 'No file chosen'. Below this is a 'Document Expiry Date' input field with a red asterisk, and an 'Upload' button. Below the form is a text box containing the text 'Current certificate of insurance coverage'. The third form is for 'Safety policy'. It shows a 'Choose File' button with the text '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.

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

Once you have submitted the appropriate employee information, please click "Save Profile" and then ensure that all required information has been submitted in each of the previous profile tabs listed above. ***NOTE*** All fields marked with a red asterisk (*) must be filled in. Save Profile


 **+ Add Employees** 

		First Name	Last Name	Title	Email
>	Edit Delete	Don Juan	De Marco	Paramour	djdemarco@generic.com
>	Edit Delete	Jean	Valjean	Mayor	24601@generic.com
>	Edit Delete	Stan	Lee	Comic book artist	stan.lee@generic.com
>	Edit Delete	Richie	Rich	Independently wealthy heir and adventurer	richie.rich@generic.com


Also, by clicking on the arrow located to the left of any particular employee name you can upload certification documents for that individual and/or launch e-learning courses required for qualification as specified by the contracting organization.

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

Once you have submitted the appropriate employee information, please click "Save Profile" and then ensure that all required information has been submitted in each of the previous profile tabs listed above. ***NOTE*** All fields marked with a red asterisk (*) must be filled in. Save Profile

+ Add Employees 


		First Name	Last Name	Title	Email
>	Edit Delete	Don Juan	De Marco	Paramour	djdemarco@generic.com
>	Edit Delete	Jean	Valjean	Mayor	24601@generic.com
>	Edit Delete	Stan	Lee	Comic book artist	stan.lee@generic.com
▼	Edit Delete	Richie	Rich	Independently wealthy heir and adventurer	richie.rich@generic.com

 **+ Upload Certification**

Certifications & Training		
File Name	Certification	Expiry Date
No Certifications Uploaded		

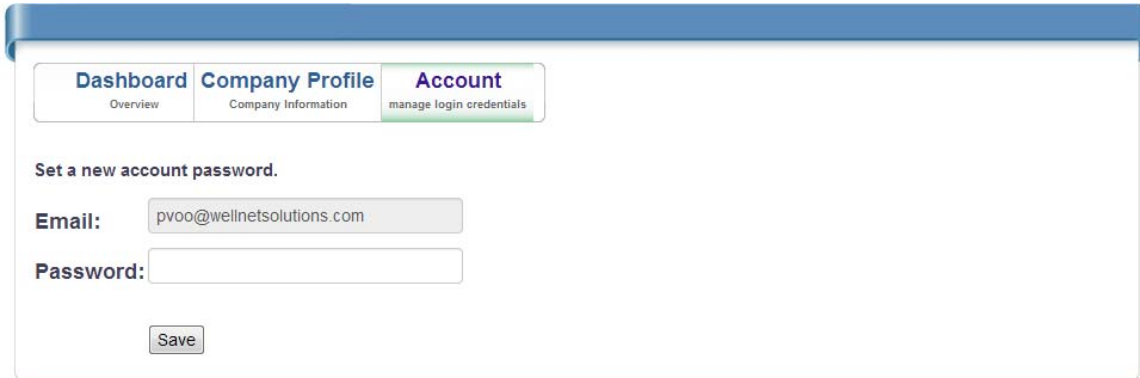
Link2eLearning Courses
Please have your employee's take the course(s) outlined below. Click the 'Send Email Invitation' link to send an email training invitation - or click the 'Launch Course' link if the employee is present at the terminal. Each course link is unique. Please do not share the same link for every employee.

Course Title	Course Link	Progress	Completed	Email Invitation
Integrated Accessibility Standards Orientation	Launch Course	0%	Incomplete	Send Email Invitation
Contractor Safety Orientation	Launch Course	0%	Incomplete	Send Email Invitation
Test Course	Launch Course	0%	Incomplete	Send Email Invitation



Updating Your Password

You can update your account's password by clicking on the [Account](#) tab.



The screenshot shows a web interface with three tabs: **Dashboard** (Overview), **Company Profile** (Company Information), and **Account** (manage login credentials). The **Account** tab is active. Below the tabs, the text reads "Set a new account password." There are two input fields: "Email:" with the value "pvoo@wellnetsolutions.com" and "Password:" which is empty. A "Save" button is located below the password field.

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

Thank you for using the Link2CDMS Contractor Document Management System!