



# Quick Submit Verification



Pending Data  
Client Admin Guide V2



# Quick Submit Verification Overview

Is a new way of processing Workers in the Supplier Portal. This will increase the effectiveness of the portal by removing some current restrictions.

The Quick Submit Verification (QSV) Supplier Portal enhancement, aims to streamline the competency submission process for suppliers and workers alike. By accepting competency submissions one-by-one, Avetta is empowering users to enhance compliance turnaround time and provide more detailed feedback.

Previous functionality had supplier administrators using the Supplier Portal for one large submission, often resulting in a lengthy process – especially for those who were waiting on evidence from an external provider.

With QSV, documents can be submitted independently. The review process can be completed, cards (if applicable) printed, and workers can get on-site faster.

The Supplier Guide and Video [can be found here](#)


The screenshot displays the 'ADD NEW EMPLOYEE' button at the top. Below it, a list of employees is shown with their status:

- Balding, Harry: Pending (blue icon), Subscribed (green button)
- Bishop, Alex: Subscribed (green button)
- Bishop, Alysse: Subscribed (green button)
- Blackmore, Joe: Expired (red button)

A modal window titled 'MANDATORY' is open, showing a list of competency submissions with a '6/6' indicator and a dropdown arrow. The submissions are:

- Driver.Govt Licence/Authority.AUS Drivers Licence: Pending (blue button)
- Electrical.Trained.Training and PPE: (no button)
- Safety.Induction.GlobalCo Orientation Training: Pending (blue button)
- Electrical.Course.Arc Flash Awareness Expires: 30 June 2023: Expiring Soon (orange button)
- Electrical.Govt Licence/Authority.Electrical Contractor: Valid (green button)
- Electrical.Trained.Lockout/Tagout: Valid (green button)

A tooltip message is displayed over the 'Pending' button for 'Safety.Induction.GlobalCo Orientation Training', stating: 'The competency has been submitted for verification or training not yet complete'.



# Viewing Workers in the Supplier Portal

Before they appear in Pending Data



# Viewing a Worker

- In the supplier portal, viewing a worker is the same
- Under Manage Employees you can view the list of your workers
- Now you can see extended statuses for every worker:
  - No Subscription
  - Subscribed
  - Expiring Subscription
  - Expired
- A valid Subscription is required to apply for Roles and to view a Workers Data

GlobalCo BUILDING THE WORLD

Access Gateway Pegasus Management Pty. Limited [Training Data]

Dashboard / Employees / Manage Employees

## Employees

Select an employee to view

Search


ADD NEW EMPLOYEE +

	Bishop, Alex	Subscribed
	Bishop, Alysse	Expiring Subscription
	Blackmore, Joe	Expired
	Branson, Thomas	Subscribed
	Brennan, Dara	Expired
	Brown, Karlee	No Subscription

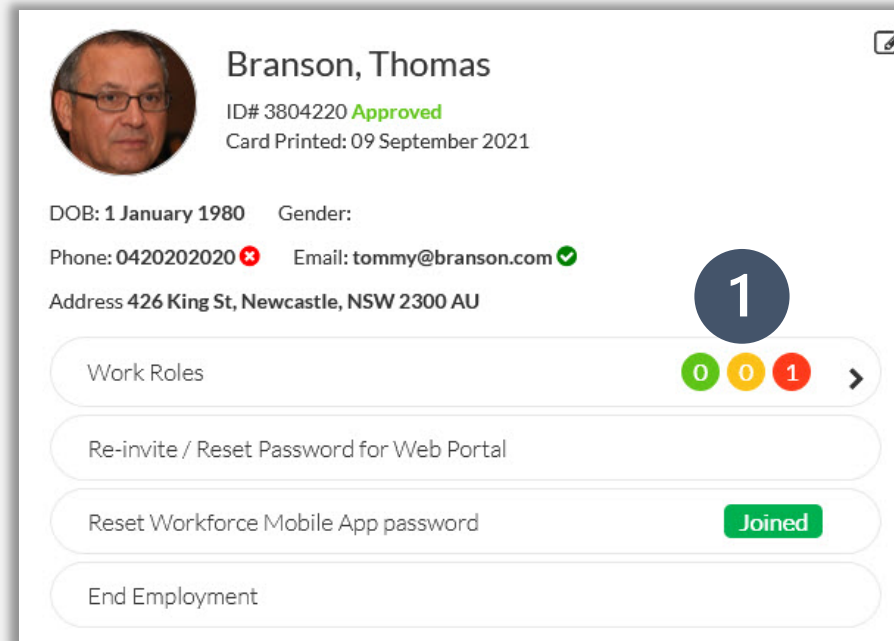
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# Viewing a Worker

- To review a Workers information, click on their name from the list
- Edit a workers details ( except for DOB) by using the edit tool 

- 1
  - View their current Role status:
    - Green = Complete Roles
    - Amber = Expiring/Working Towards
    - Red = Expired Roles
- 2
  - Clicking the number will open the Role status. You can quickly see the status of the Role
- 3
  - You can then explore and see what might need attention



Branson, Thomas  
ID# 3804220 **Approved**  
Card Printed: 09 September 2021

DOB: 1 January 1980 Gender:  
Phone: 0420202020  Email: tommy@branson.com   
Address 426 King St, Newcastle, NSW 2300 AU

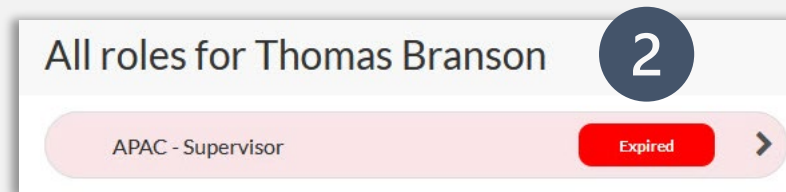
1

Work Roles 0 0 1 >

Re-invite / Reset Password for Web Portal

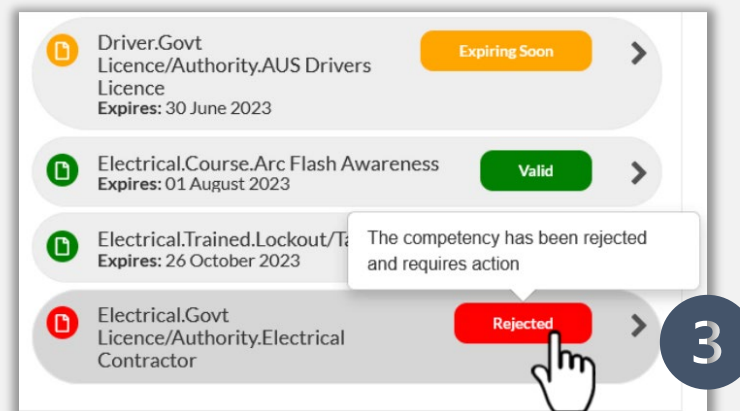
Reset Workforce Mobile App password **Joined**

End Employment



All roles for Thomas Branson 2

APAC - Supervisor **Expired** >



Driver.Govt Licence/Authority.AUS Drivers **Expiring Soon** >  
Licence Expires: 30 June 2023

Electrical.Course.Arc Flash Awareness **Valid** >  
Expires: 01 August 2023

Electrical.Trained.Lockout/T... **The competency has been rejected and requires action**  
Expires: 26 October 2023

Electrical.Govt Licence/Authority.Electrical Contractor **Rejected** >

3



# Adding a Worker in the Supplier Portal

What Pending Data appears from this action



# Adding a Worker

- Click *Add New Employee*
- Upload a Passport style photo in JPG format, adjust to fit frame and click *Done*
- Once complete, move to enter workers personal details
- Add Mobile Number is applicable
- Ensure that Email address is unique
- Preferably Workers personal email address.
- This is required for notifications of expiring items, login for Learning Management System and Site Broadcast Notifications
- Email is checked to see if unique
- Agree to End User Service Agreement, then *Save & Close*

Person

Photo Upload \*

Please supply a recent and genuine profile image of the worker.

Note: Image must be a JPEG no more than 5MB in size.

Business Rules

Done ✓

Personal Details

Create a new employee

Note: Image must be a JPEG no more than 5MB in size.

Business Rules

Upload

Crop

DOB \* 02 February 1949

Phone \* 0420202020

Email \* MichelleMasters@trial.net.au

Locale No preference

Find Address

Search for the address or supply it manually below

Back to Manage Employees

SAVE & CLOSE

Email \* webinartraining@pegasus.net.au

This email already exists, please use another

Agree to End User Service Agreement

Back to Manage Employees

SAVE & CLOSE



# Adding a Worker – Pending Data

- Depending upon the portal configuration this worker might be auto approved, or sitting in Pending Data to be approved.
- To review, open Onsite Track Easy under your Site/Realm, click *Pending Data* > *Select Type = All and Apply*
- Review the list of workers under the Cardholders section and select the relevant person to open their application for a new worker
- This will open a new page to review them

The screenshot shows a worker's profile for Michelle Masters. The profile includes a blue person icon, name, ID# 4424828 (Submitted), and Card: Not yet printed. Below this are fields for DOB (2 February 1949), Gender, Phone (+61420202020), Email (MiichelleMasters@trial), and Address (123 test st, testtown, NSW 2300 AU). There are buttons for Subscription, Work Roles, and End Employment. A blue arrow points from the 'Pending Data' section of the dropdown menu to the 'Pending Data' section of the profile page.

**Pending Data** Type: -- All --

- Please select --
- Companies
- Company Associations
- Compliance Certs
- Compliance SMS Reviews
- Cardholders
- Cards
- Cardholder Associations
- Bookings
- Assessments
- Verified Docs
- Verified Doc Competency Uploads
- All --

**Latest Version 2.192.**

- New Features \***
- Multiple Companies**  
Cardholders may now w
- Default Companies**  
Cardholders have a rea
- End Employment**  
When employees leave
- Company Relationshi**  
Notification emails are now sent when new company relations

**Cardholders:** Count: 21 Sort by: Company [hide]

Name	ID	Due Date	Company	Source	For Site	Dependent Sites	Submitted On	Submitted By
Soto, John	1497519		NORTH GRID ELECTRICAL PTY LIMITED	PORTAL	Ausgrid - ASP		01 Nov 2022	Jessica Soto
Forgetter, Darren	1587774		Pegasus Management Pty. Limited [Training Data]	PORTAL			08 Jul 2023	Damien Challen
Masters, Michelle	1587775		Pegasus Management Pty. Limited [Training Data]	PORTAL			03 Jul 2023	Damien Challen
Suszwicki, Matthew	1518927		PERIMETA PTY LTD	PORTAL			12 Jan 2023	Paul Davis
Connolly, Louise	1575580		Siobhan's Traffic Control Services Pty Ltd	PORTAL			03 Jun 2023	Siobhan Mc Allen





# Adding a Worker – Pending Data

- Review the data inputted for this worker and check to see if all appears valid. The portal will do some checks to ensure the fields contain the right data, like phone numbers or dates, but you can check names and locations.
- Once happy with the information, you can approve this request to begin the creation step.
- Or return this application to the portal for the Supplier Administrator to amend. It will appear for them under Returned Cardholders.

**Pending Cardholder Michelle Masters**

▶ Please review and approve the pending person fields and files for entry to Onsite.

**1. Fields**

Company: Pegasus Management Pty. Limited [Trair]  
Last Name: Masters  
First Name: Michelle  
Middle Name:  
Date of Birth: 02 Feb 1949  
Drivers License Number:  
Drivers License State:  
Drivers License Class:  
Drivers License Expiry:  
Gender: Unset  
Address: 123 test st  
Town: testtown  
State: NSW  
Post Code: 2300  
Country: Australia  
Phone 1: +61420202020  
Phone 2: +61420202020  
Email 1: MichelleMasters@trial.com  
Email 2: MichelleMasters@trial.com  
Place of Birth:

**2. Files**

No file uploads were required.

**3. History**

Date/Time	Status Set To	Status Set By	Comm	Comment
03 Jul 23 at 11:51	STARTED	Damien Challen		Saved in PortalAusgrid
03 Jul 23 at 11:51	SUBMITTED	Damien Challen		Status update

**4. Dependencies**

Details	Date/Time	Status Set To	Status Set By	Comment
Pegasus Card Request	03 Jul 23 at 11:51	STARTED	Damien Challen	

▶ Data that cannot be processed until this pending person is **approved** are known as **dependencies**.  
▶ If you **reject** this pending person all of their dependent data will be rejected.  
▶ Pending person rejection should be reserved for **false/misleading data**. If you do not want this person to be associated with or attend training on a site you should reject their association or booking.

I approve the pending person fields and files to be entered into Onsite.

cancel return reject approve

▶ **Approve** this person to be entered into Onsite either as an existing or new person.  
To enable the approve button, tick all file approval boxes, process photos and then the one above.

▶ **Return** this person to their creator for data completion before processing.

▶ **Reject** this person to prevent them from being processed by another user.

I approve the pending person fields and files to be entered into Onsite.

cancel return reject approve

▶ Please explain why this pending person should be returned.  
Your explanation will be visible to users from this person's company.

apply

# Adding a Worker – Pending Data

- If choosing to approve, it might suggest that this worker already exists. The system will conduct an initial search to identify similar matches on key criteria.
- Should no exist match occur: You can proceed to add as new, to create this worker in the system.
- If there is a match: You can review the existing worker that appears, see if it matches on a number of fields and approve or reject the duplicate. Best practice suggests we would only consider a match if the worker names and date of birth align.
- In this example, once approved, in the Supplier Portal the ID# status will change from **Submitted** to **Approved**

**Pending Cardholder Michelle Masters**

Company: Pegasus Management Pty. Limited (Trair)  
Last Name: Masters  
First Name: Michelle  
Middle Name:   
Date of Birth: 02 Feb 1949  
Drivers License Number:   
[cancel](#)

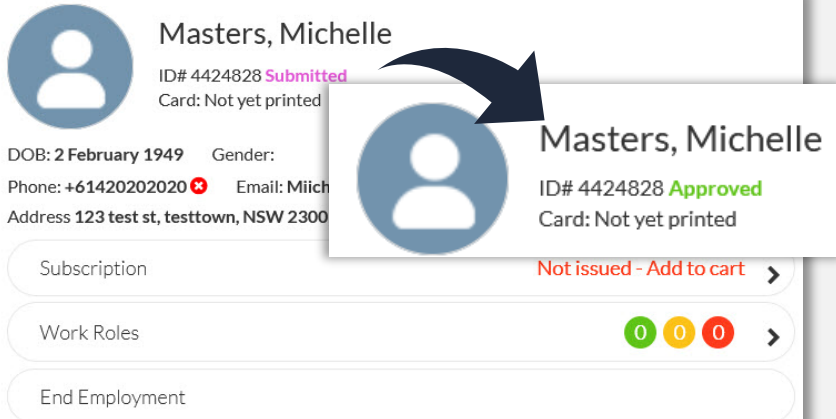
---

**ADD CONTRACTOR TO ONSITE**

[search for existing](#) ▶ Before a new contractor can be added use **search for existing** to determine  
▶ Search results will include system-wide Contractors and Employees you have  
 Include "sounds like" ▶ **Select a name below** for a side-by-side comparison and the option of using

**SEARCH DONE: No Matching Cardholders Found.**

[add as new](#)  
▶ If you are sure there is no existing cardholder use **add as new** to proceed with adding the new contractor.  
▶ Please make sure you are not creating a duplicate.

A user profile card for Michelle Masters. The card shows her name, ID# 4424828, and status. The status is initially 'Submitted' in pink, but an arrow points to a callout box where it has changed to 'Approved' in green. Other details include her date of birth (2 February 1949), gender, phone number, email, and address. There are also sections for 'Subscription', 'Work Roles', and 'End Employment'.

**Masters, Michelle**  
ID# 4424828 **Submitted**  
Card: Not yet printed

DOB: 2 February 1949 Gender:   
Phone: +61420202020 ✘ Email: Miich   
Address 123 test st, testtown, NSW 2300

Subscription Not issued - Add to cart >

Work Roles 0 0 0 >

End Employment



# Adding a Role to a Worker in the Supplier Portal

What Pending Data appears from this action



# Manage Roles

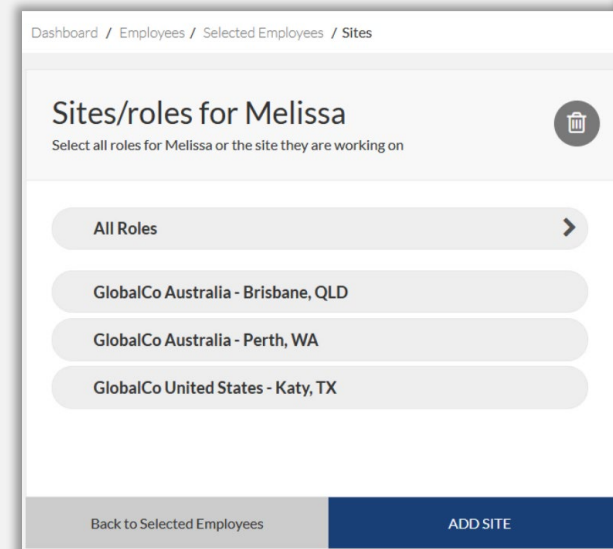
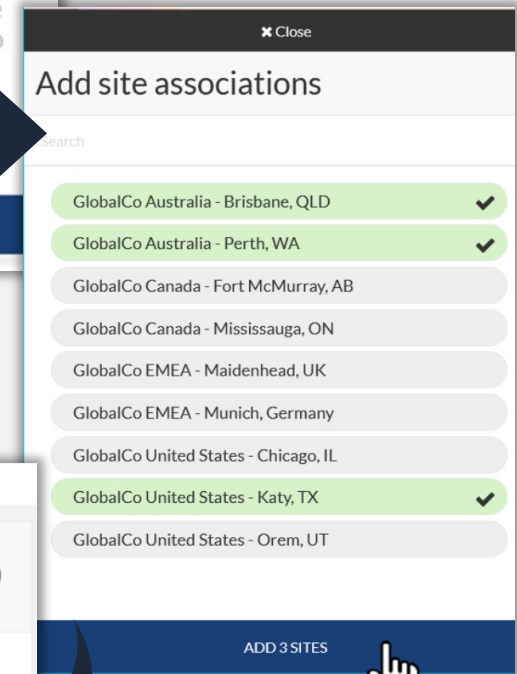
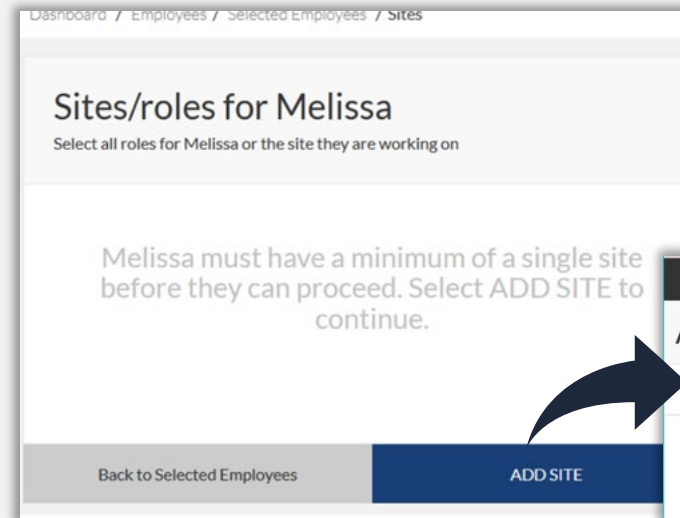
- Click on *Manage Roles*
- *Search/Click* on the relevant Worker
- Ensure they have a valid Subscription. Workers without a subscription will not be able to have Roles added/modified.
- Click on *Worker Name* to Select
- They will appear in right-hand menu. *Select Continue* to progress

The screenshot illustrates the 'Manage Roles' workflow. On the left, a dark blue navigation menu contains 'Home', 'Manage Roles' (highlighted with a green bar), 'Manage Employees', 'Pending Actions', and 'Logout'. An arrow points from 'Manage Roles' to the main content area. The main content area is titled 'Dashboard / Employees' and features a section 'Employees Available' with the instruction 'Select employees to add to action list'. Below this is a search bar containing 'melissa' and an 'ADD NEW EMPLOYEE +' button. A list of employees is shown, with 'Runners, Melissa' highlighted and a green 'Subscribed' button next to her name. An arrow points from this button to the 'Employees Selected' section. This section is titled 'Employees Selected' with the instruction 'These are the employees you will action'. It includes a search bar and a list of three employees: 'Thomas Branson' with a 'COURSE SELECTOR' button, 'Sharon Challenge' with a 'CONTINUE' button and a 'Pending' status indicator, and 'Melissa Runners' with a 'CONTINUE' button. A hand cursor is shown clicking on the 'CONTINUE' button for Melissa Runners.



# Adding Sites

- Click on *Add Site*
- *Select Site(s)* from the list available. Only select Sites your worker will attend
- Multiple Sites can be selected at once. *Select Add Site(s)* when ready
- Worker will now be associated to those sites\*. In Onsite Track Easy and Client Portal this worker will now appear as visible.  
*\*Depending on whether the auto-associate to site settings are configured*
- Can use the rubbish bin button to remove a site if it was applied by mistake, or if you wish to remove association





# Adding Roles

- Click on *Add New Role*
- Can add multiple Roles at once
- *Note that roles are NOT APPLIED at this time to the worker, we are essentially assigning these roles to apply for at this time*
- Once added, depending upon any existing competencies, the Role Status will show. In this example there are none, so Role is not compliant
- *Click on desired role to start uploading evidence/book training/answer questions*

Close

## Add New Roles

Search

- APAC - Electrician ✓
- APAC - HVAC Technician
- APAC - Heavy Truck Driver
- APAC - In-Store Entertainer ✓
- APAC - Pest Control
- APAC - Project Manager (Construction)
- APAC - Welder
- Crown Safety Awareness
- LK Test
- US - Electrician

ADD 2 ROLES

## All roles for Melissa Runners

Mandatory training has not been completed, mandatory competencies not supplied, have expired or have been returned for action

Search

- APAC - In-Store Entertainer Not Compliant
- APAC - Electrician Compliant

ADD NEW ROLE

## Competencies for Melissa Runners

Role APAC - In-Store Entertainer

Expand All | Collapse All

**MANDATORY** 0/2

- Driver.Govt Licence/Authority.AUS Drivers Licence Unfilled
- Government.Immunisation.Covid 19 Vaccination / Exemption Unfilled



# Adding Requirements

- Click on first competency item
- Multiple options could appear:
  - File Uploads
  - Online/Classroom Training Enrolment
  - Questions
  - Acknowledgement Steps
  - Optional Competencies
- For file uploads, they stay in the portal for this worker in the Document Library. Library files can be re-used when applying for Roles to save re-uploading
- Business Rules link available for all items to check you are uploading relevant items
- When ready, press *Save & Submit* to send this item to the Verification Team

Competency  
Driver.Govt Licence/Authority.AUS Drivers Licence

Business Rules

Select evidence for: Driver.Govt Licence/Authority.AUS Drivers Licence

Select or Upload Document

Cancel

Document Library  
Select or upload the document required  
Allowed file types: PDF, DOC, JPG, JPEG, XLS, TXT, DOCX

Edit Select None

MEDICAL HISTORY  
Medical Certificate  
ACMI  
PLANT OPERATOR  
VOC Register  
Name: \_\_\_\_\_  
Company: \_\_\_\_\_

Select or Upload Document

Select 1 document

Extra information required:

Issue Date	01 June 2023
Expiry Date	30 June 2023
Comments	

Cancel Save & Submit



# Adding Requirements

- Work through each Role Requirement and supply evidence, answer question or book into training
- Each time you press *Save & Submit*, this that evidence is sent to the verification team to process. As items are reviewed and verified, you will see that status change in the Supplier Portal for that competency/item
- **Statuses are:**
  - Unfilled
  - Pending
  - Expiring Soon
  - Valid
  - Rejected
- Hover over any item to see context specific information

Competencies for Melissa Runners  
Role APAC - Electrician

[Expand All](#) | [Collapse All](#)

**MANDATORY** 4/6

- Electrical.Trained.Training and PPE (Unfilled)
- Safety.Induction.GlobalCo Orientation Training (Pending)
- Driver.Govt Licence/Authority.AUS Drivers Licence Expires: 30 June 2023 (Expiring Soon)
- Electrical.Course.Arc Flash Awareness Expires: 01 August 2023 (Valid)

[Back to Roles](#)

Electrical.Trained.Lockout/T Expires: 26 October 2023 (The competency has been rejected and requires action)

Electrical.Govt Licence/Authority.Electrical Contractor (Rejected)





# Pending Data - Competencies

- As each competency is submitted in the portal this will instantly appear as a pending data item under Verified Documents
- You can see under Document, what the item is that requires verification
- 1. Select the Workers name to bring the data verification process
- 2. Review the application. You can click the Worker ID to be taken to their profile for easy access to other Roles/Competencies if necessary.
- Press Cancel to send this application back to pending data. If you don't, after 1 hour of inactivity, this will automatically return this.
- 3. Can now start the verify the document process
- 4. Can see history of this file application

**MANDATORY**

The competency has been submitted for verification or training not yet complete

- Driver.Govt Licence/Authority.AUS Drivers Licence **Pending**
- Government.Immunisation.Covid 19 Vaccination / Exemption **Unfiled**

**Pending Data** Type: -- All -- Limit: First 10 Source: Portal Filter By: Not

Verified Docs: Count: 1 Sort by: Submitted On **hide**

Name	ID	Source	Company	Document
Runners, Melissa	613621	PORTAL	Pegasus Management Pty. Limited [Training Data]	Driver.Govt Licence/Authority.AUS Drivers Licence

1

**Process GlobalCo - \*Global Pending Card Verified Doc**

- ▶ Please review and verify Melissa Runners's file upload.
- ▶ The file should be opened and checked to ensure it matches the requirements.

**1. Compliance**

Person: **Melissa Runners**

Person Id: **4205737**

Date of birth: 01 May 71

Company: Pegasus Management Pty. Limited [Training Data]

Communicate To: Damien Challen

Communicate Email: dchallen@pegasus.net

**cancel**

2

**2. Data**

**AUS Drivers Licence** **verify**

Driver.Govt Licence/Authority.AUS Drivers Licence

<https://kb.pegasus.net.au/display/PMBR/Manufacturing+Business+Rules+%7C+GlobalCo>

Mandatory for Role(s): **APAC - In-Store Entertainer** , **APAC - Electrician**

**3. History**

Date/Time	Status Set To	Status Set By	Comm	Comment
20 Jun 23 at 15:24	STARTED	Damien Challen		
20 Jun 23 at 15:24	SUBMITTED	Damien Challen		

3


4



# Pending Data - Competencies

- As mentioned, click *Verify* to start the process
- Review:
  - Person details
  - Competency type
  - Click *file* to open and verify matches worker person details. This should be rejected if it does not match.
  - Issue date (if applicable)
  - Expiry date (if applicable)
- If business rules request this, adjust those dates accordingly. The expiry date will be linked to this competency and make that the expiry date for this evidence.
- Once reviewed and satisfied it matches rules and person, select “*I have carefully checked*” and “*It genuinely DOES represent the person*”.
- Enter in a comment and press *Verify*
- Only *Cancel* if you do not wish to verify this now and return to the list of files to be verified

2. Data

AUS Drivers Licence  
 Driver.Govt Licence/Authority.AUS Drivers Licence

Mandatory for Role(s): APAC - In-Store Entertainer , APAC - Electrician

3. History

Date/Time	Status Set To	Status Set By	Comm	Comment
20 Jun 23 at 15:24	STARTED	Damien Challen		
20 Jun 23 at 15:24	SUBMITTED	Damien Challen		


Competency

Person:	Melissa Runners
Date of Birth:	01 May 1971
Competency:	Driver.Govt Licence/Authority.AUS Drivers Licence
Library:	GlobalCo - *Global

(no existing assignments)

Document

Issue Date:	<input type="text" value="01 Jun 2023"/> <input type="button" value="19"/>
Expiry Date:	<input type="text" value="30 Jun 2023"/> <input type="button" value="19"/>
Uploaded By:	Damien Challen
Upload Time:	20 Jun 23 at 15:24
Private:	No
Sensitive:	No
File Type:	Adobe Acrobat Document
File Size:	51,928 bytes

   
click to open

Comment:

Declaration

I, **Damien Challen**, have carefully checked this document, and declare as follows:

It genuinely **DOES** represent the Person, Competency, Issue Date and Expiry Date shown above.

It genuinely **DOES NOT** represent the Person, Competency, Issue Date and Expiry Date shown above.

Comment:



# Pending Data – Returning a File

- Rejecting a file follows the same process as verifying however we change the declaration option.
- Select “*It genuinely DOES NOT represent the person*”
- Enter in the appropriate comment. This will be displayed on the email the Supplier Administrator receives as the reason for the rejection.
- The Supplier portal will show the status as Rejected
- This comment will also display in the Supplier Portal under the Competency Section for the administrator to see the reason for this being not verified

**Competency**

Person:	Melissa Runners
Date of Birth:	01 May 1971
Competency:	Electrical.Govt Licence/Authority.Electrical Contractor
Library:	GlobalCo - *Global

(no existing assignments)

**Document**

Issue Date:	01 Jun 2023
Expiry Date:	
Uploaded By:	Damien Challen
Upload Time:	20 Jun 23 at 15:27
Private:	No
Sensitive:	No
File Type:	Adobe Acrobat Document
File Size:	81,037 bytes

click to open

**Declaration**

I, Damien Challen, have carefully checked this document, and declare as follows:

It genuinely **DOES** represent the Person, Competency, Issue Date and Expiry Date shown above.

It genuinely **DOES NOT** represent the Person, Competency, Issue Date and Expiry Date shown above.

**Comment:** (mandatory) Wrong Name on Certificate submitted. Please submit the correct one.

cancel reject

### Competencies for Melissa Runners

Role APAC - Electrician

Competency	Status
Driver.Govt Licence/Authority.AUS Drivers Licence Expires: 30 June 2023	Expiring Soon
Electrical.Course.Arc Flash Awareness Expires: 01 August 2023	Valid
Electrical.Trained.Lockout/Tagout Expires: 26 October 2023	The competency has been rejected and requires action
Electrical.Govt Licence/Authority.Electrical Contractor	Rejected

### Competency (Rejected)

Electrical.Govt Licence/Authority.Electrical Contractor

Wrong Name on Certificate submitted. Please submit the correct one.

Business Rules

Select evidence for: Electrical.Govt Licence/Authority.Electrical Contractor


Renew/Replace document Download document (7)




# Pending Data – Returning a File

- An action email is now sent to the Supplier Administrator informing them of the worker, what document was rejected and what actions are required next.
- Under Pending Actions in the Supplier Portal there is a new section called Returned Competencies
- Returned items are shown here. If the original Supplier Administrator that submitted this is not available (they would have been sent an email) this section will show all competencies that have been rejected/returned. Any administrator with access can then select *Continue* and manage these returned items.

A Competency for Melissa Runners has been Returned for Action by GlobalCo Worker Management

 Onsite Track Easy <do\_not\_reply@onsitetrackeasy.com.au>  
To: Damien Challen

 **Pegasus Workforce**

A Competency has been Returned for GlobalCo - \*Global. Please see reason below and action accordingly.

**Person** : Melissa Runners  
**Competency** : Electrical.Govt Licence/Authority.Electrical Contractor  
**Reason** : Wrong Name on Certificate submitted. Please submit the correct one.  
**Rejected by** : Damien Challen  
**Rejected on** : 20 Jun 23 at 15:30

**Action Now** Please go to Pending Actions then Returned Competencies and upload documents then submit for verification.

For further assistance please contact:  
**Email** : [info@pegasus.net.au](mailto:info@pegasus.net.au)  
**Phone** : 1300441433

The GlobalCo Worker Management is powered by Pegasus Workforce an Avetta Company  
**Portal Website** : <https://GlobalCo-epe.ap-on.net>

### Pending Actions

Please review and complete any outstanding items

- Returned Applications >
- Returned Competencies >**
- Continuing Applications >
- Returned Employees >
- Book Training >

### Returned Competencies

<b>Employee Name:</b> Melissa Runners	<b>Comment Date:</b> 20 June 2023	<b>REJECTED</b> <b>CONTINUE &gt;</b>
<b>Competency:</b> Electrical.Govt Licence/Authority.Electrical Contractor		
<b>Comments:</b> Wrong Name on Certificate submitted. Please submit the correct one.		
<b>Employee Name:</b> Sim Card	<b>Comment Date:</b> 01 June 2023	<b>REJECTED</b> <b>CONTINUE &gt;</b>
<b>Competency:</b> Pest Control.Qualified.Pest Management Licence		
<b>Comments:</b> An incorrect document has been submitted. Please refer to the		



# Submitting Roles

- Once all file uploads are done, depending upon the Role configuration, the option to either Submit or Course Selector\* will appear  
*\*if configured for online courses*
- Review the notes on the page for both configurations
- You will know you are ready to submit when the “*Is this Role Application Complete?*” appears. This will finally submit the Roles you wish to apply for to the Verification Team to approve these Roles.
- *Note you might be required to apply for site and/or trade and task roles depending upon the client.*
- Once submitted, the company administrator will receive an email once the Roles are approved

Competencies for Melissa Runners  
Role APAC - Electrician

Expand All | Collapse All

MANDATORY 5/6

- Electrical.Trained.Training and PPE Pending
- Safety.Induction.GlobalCo Orientation Training Pending
- Driver.Govt Licence/Authority.AUS Drivers Licence Expires: 30 June 2023 Expiring Soon
- Electrical.Course.Arc Flash Awareness Expires: 01 August 2023 Valid

Back to Roles

Competency  
Electrical.Course.Arc Flash Awareness

Business Rules

Extra information required:

Issue Date	01 June 2023
Expiry Date	01 August 2023
Comments	Assigned in Realm: GlobalCo - "G"

Course Selector

Course Selector  
Please go through the list and confirm the dates for the classroom courses

- GlobalCo Safety Orientation Induction

Back to Employee Roles SUBMIT

How to Book Courses

**For Online Training:**  
Once the application is submitted the employee will be enrolled into our online training platform. Please ensure they check their email for instructions.

**For Classroom Training:**  
Classroom training must be completed to meet the requirements for this role.  
After you submit or checkout and pay, you will be presented with a Book Training button.  
Click that button to be taken to the Book Training page, where you

**Is this Role Application Complete?**

Please ensure you have selected all Roles that are required.

If you continue you acknowledge that this Role Application will be locked for processing. You will not be able to add or remove Role(s) until the Application is reviewed and processed.

Back Continue



# Approving Role Applications

Speeding up the old process



# Approving a Role

- Once the Supplier Administrator select the Continue option on the “*Is this Role Application Complete*” page, this pushes the role application to pending data
- The portal will reflect this with the Role Status as well. Statuses such as Awaiting Approval, Expiring Soon, Expired will be labeled on the Role
- Returning to Pending data, we now refresh the view, once again looking for all types. This will display a new item under Cards for this worker. You can see the Card/Data reference is for Data. This means Role steps need attention
- Depending upon the Role(s) the worker applied for, there may be some additional steps the worker has to do before the Role(s) are approved. This can be classroom/online training to be completed before the Role is complete. The worker may not necessarily be allowed on site at this time.

Is this Role Application Complete?

Please ensure you have selected all Roles that are required.

If you continue you acknowledge that this Role Application will be locked for processing. You will not be able to add or remove Role(s) until the Application is reviewed and processed.

Back  Continue

## All roles for Melissa Runners

Search

Competencies are submitted for processing or complete and role is awaiting approval. When an application is awaiting approval you cannot add or remove roles

APAC - Electrician Awaiting Approval

APAC - In-Store Entertainer Awaiting Approval

**Pending Data** Type: -- All -- Limit: First 10 Source: Portal Filter By: Nothing

Cards: Count: 2 Sort by: Company hide

Name	ID	Company	Card Design	Card / Data	Source	For Realm/Site
Inayat, Soofia	1720511	PEGASUS MANAGEMENT PTY. LIMITED	Pegasus International	Sub	PORTAL	Realm: GlobalCo - *Global
Runners, Melissa	1720857	Pegasus Management Pty. Limited [Training Data]	Pegasus International	Data	PORTAL	Realm: GlobalCo - *Global



# Approving a Role

- 1. Pending data will show the worker notes. We can not approve the role at this time (“I approve” is greyed out) until some additional verification steps are undertaken
- Client Admins can click on Cardholder ID to review their profile
- 2. Click *Plus Sign* to open and review Role(s) worker is applying for and contact details.  
*Note: Some clients require worker to apply for a Site Role, Trade/Task and additional Contractor/Employer role. If this is the case, the worker would have this Role application returned so they can add the additional required Role(s).*
- 3. Begin reviewing files section to ensure all appropriate files have been approved and verified where necessary

1

Please review and approve this person's roles.  
Each file should be opened and checked to ensure it matches the requirements.

**1. Summary**

Person: Melissa Runners  
 Cardholder Id: 4205737  
 Date of Birth: 01 May 1971  
 Company: Pegasus Management Pty. Limited [training Data]  
 Uploads: 6 files  
 Request Type: Roles

I approve Melissa Runners's roles and have verified the uploaded files

cancel
return
reject
approve

▶ Cancel pending processing... Your home page will list the unprocessed data.  
▶ Return  
▶ Reject  
▶ Approve To enable tick all files

2

**2. Data**

**GENERAL**  Reviewed Roles: APAC - In-Store Entertainer, APAC - Electrician hide general

**Roles**

Role	Admin Notes Since Last Submit
APAC - In-Store Entertainer	(none)
APAC - Electrician	(none)

Communicate To: Damien Challen  
 Communicate By: Email  
 Email: dchallen@pegasus.net.au

3

**FILES**  Reviewed 6 Approved hide files

**File1: \* AUS Drivers Licence** Authority: GlobalCo - \*Global

Driver.Govt Licence/Authority,AUS Drivers Licence (id 110547) Verified On: 20 Jun 23 at 15:29

Mandatory for Roles: APAC - In-Store Entertainer,APAC - Electrician, Click [here](#) to search full list Expiry Date: 30 Jun 2023

<https://kb.pegasus.net.au/display/PMBR/Manufacturing+Business+Rules+%7C+GlobalCo>

**File2: \* Arc Flash Awareness** Authority: GlobalCo - \*Global

Electrical.Course.Arc Flash Awareness (id 110571) Verified On: 20 Jun 23 at 15:29

Mandatory for Roles: APAC - Electrician, Click [here](#) to search full list Expiry Date: 01 Aug 2023

[Click here](#) for a list of GlobalCo Business Rules.

**File3: \* Covid 19 Vaccination** Authority: GlobalCo - \*Global

Government.Immunisation.Covid 19 Vaccination / Exemption (id 110617) Verified On: 20 Jun 23 at 15:28

Mandatory for Roles: APAC - In-Store Entertainer,APAC - Electrician, Click [here](#) to search full list Expiry Date: 30 Sep 2023

[Click here](#) for a list of GlobalCo Business Rules.





# Approving a Role

- 1. Each section must be reviewed individually by pressing the + icon. This will tick off the Reviewed indicator. This ensures that Pending Data reviewers are checking each step of the process.
- 2. Once all sections are reviewed, then option to approve or return unlocks. Review the required comments here and if returning, a comment section will appear if you choose to return.
- Note: Typically roles are not Rejected but Returned for the Supplier Administrator to manage. The comment field will appear if this option is selected.
- 3. Once a Role is approved, the Supplier Administrator that is listed under the contact field will be informed of this Role approval. Notes accompany email stating that worker might still not meet site requirements and to review access.

2. Data 1

GENERAL	<input checked="" type="checkbox"/> Reviewed	Roles: APAC - In-Store Entertainer, APAC - Electrician	show general +
FILES	<input checked="" type="checkbox"/> Reviewed	6 Approved	show files +

1. Summary 2

Person: Melissa Runners  
 Cardholder Id: 4205737  
 Date of Birth: 01 May 1971  
 Company: Pegasus Management Pty. Limited [training]  
 Uploads: 6 files  
 Request Type: Roles

I approve Melissa Runners's roles and have verified the uploaded files

cancel return reject approve

▶ **Cancel** pending processing. Your home page will list the unprocessed data.  
 ▶ Please explain **why this card print should be returned.**  
 Your explanation will be visible to users from this person's company.

cancel return reject approve

▶ **Cancel** pending processing. Your home page will list the unprocessed data.  
 ▶ **Return** this roles to creator for data completion before processing.  
 ▶ **Reject** this roles to prevent this person from having their data updated.  
 ▶ **Approve** this person's roles and verify the uploaded files.  
 To enable the approve button, review all data, verify all documents, tick all file approval boxes and then the one above.

GlobalCo Worker Management Role Application for Melissa Runners has been Approved 3

OT Onsite Track Easy <do\_not\_reply@onsitetrackeasy.com.au>  
 To Damien Challen

Pegasus Workforce

The following person has been approved for GlobalCo Worker Management Role Application:

Person : Melissa Runners  
 Approved By : Damien Challen  
 Approved On : 20 Jun 23 at 15:38

**IMPORTANT:** An approved Role Application does not mean the worker will have access to site. The worker must meet Site Requirements for Role and Access Control Compliance.

For further assistance please contact:

Email : [info@pegasus.net.au](mailto:info@pegasus.net.au)  
 Phone : 1300441433

The GlobalCo Worker Management is powered by Pegasus Workforce an Avetta Company



# Approving a Role with Card Data

- 1. Depending upon the Supplier Portal configuration for the client, the pending data under Cards might show a card/data request.
- 2. Repeat the same steps as mentioned in previous pages but you will also see a Card Image for this worker on-screen.
- 3. Approving the files are the same, however there will be an additional step to approve the *Worker Photo*. This is because it will be attached to the card upon printing and needs to meet the standard card image requirements.
- Card image should be passport photo format, no sunglasses, no hat, on white background for clarity and in focus. A Client Admin can return this application if the photo does not match requirements.

**Pending Data** Type: -- All -- Limit: First 10 Source: Portal Filter By: Nothing

Cards: Count: 5 Sort by: Company hide

Name	ID	Company	Card Design	Card / Data	To Verify	Source	For Realm/Site
Anderson, Sam	1512542	Heavy Haulers	Pegasus International	Card/Data	1	PORTAL	Realm: GlobalCo - *Global
Albertson, James	1635255	Minecrafters	Pegasus International	Card/Data	1	PORTAL	Realm: GlobalCo - *Global

1

## Process Pegasus International Registration, Roles, Card for Sam Anderson

- Please review and approve this person's registration, roles, card.
- Each file should be opened and checked to ensure it matches the requirements.

### 1. Summary

Person: Sam Anderson  
 Cardholder Id: 3872011  
 Date of Birth: 19 Aug 1960  
 Company: Heavy Haulers  
 Uploads: 3 files  
 Request Type: Registration, Roles, Card



2

I approve Sam Anderson's Pegasus International registration, roles, card and have verified the uploaded files

cancel return reject approve

- Cancel** pending processing. Your home page will list the unprocessed data.
- Return** this registration, roles, card to creator for data completion before processing.
- Reject** this registration, roles, card to prevent this person from having a card printed.
- Approve** this person's registration, roles, card and verify the uploaded files. To enable the approve button, review all data, verify all documents, tick all file approval boxes and then the one above.

### 2. Data

**GENERAL**  Reviewed • Roles: APAC - Heavy Truck Driver show general

**FILES**  Reviewed • 2 Pending 1 Approved hide files

**File1 \*** AUS Drivers Licence  
 Driver:Govt Licence/Authority.AUS Drivers Licence (id 110547)  
 Mandatory for Roles: APAC - Heavy Truck Driver , Click here to search full list  
 Authority: GlobalCo - \*Global  
 Verified On: 20 Jun 22 at 10:41  
 Expiry Date: 02 Apr 2028  
<https://kb.pegasus.net.au/display/PMBR/Manufacturing+Business+Roles+%7C+GlobalCo>

**File2 \*** Covid 19 Vaccination  
 Government.Immunisation.Covid 19 Exemption (id 110616)  
 (GRP Government.Immunisation.Covid 19 Vaccination / Exemption)  
 Mandatory for Roles: APAC - Heavy Truck Driver , Click here to search full list  
verify  
[Click here](#) for a list of GlobalCo Business Rules.

**File3 \*** Photo  
 Mandatory Cardholder Photo  
 Head and shoulders well lit photo taken from the front with a plain background. Please remove hat or sunglasses. Image can be larger than needed as it will be framed and cropped before printing on the card.

Name	Comment	Thumbnail	Open	Approve
3872011_396848122image.jpg			<input type="checkbox"/>	<input type="checkbox"/>

### 3. History

Date/Time	Status Set To	Status Set By	Comm	Comment
23 Feb 22 at 09:01	STARTED	Kurt Girven		
18 Oct 22 at 14:22	SUBMITTED	Kurt Girven		Submitted in portal

3

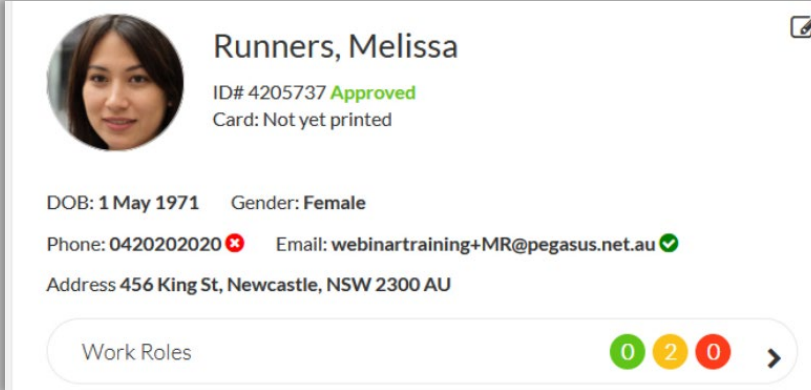


# Viewing Approved Roles for a Worker

Checking up on someone

# Approved Role - Portal View

- With Roles approved, we can now see this status reflected in the Supplier Portal for that worker under Manage Employees.
- Selecting the number against Work Roles will open the status
- Context sensitive tool tips will highlight the status of Roles when hovered over.
- A Role Status (not a competency) can be one of the following:
  - Compliant
  - Non Compliant
  - Expiring Soon
  - Expired
  - Awaiting Approval



Runners, Melissa

ID# 4205737 **Approved**  
Card: Not yet printed

DOB: 1 May 1971 Gender: Female

Phone: 0420202020 🇺🇸 Email: webinartraining+MR@pegasus.net.au ✓

Address 456 King St, Newcastle, NSW 2300 AU

Work Roles 0 2 0 >

## All roles for Melissa Runners

APAC - Electrician  
Expires: 30 June 2023

Expiring Soon

APAC - In-Store Entertainer  
Expires: 30 June 2023

Expiring Soon

## MANDATORY

The competency is expiring within 30 days

Driver.Govt Licence/Authority.AUS  
Drivers Licence  
Expires: 30 June 2023

Expiring Soon

Government.Immunisation.Covid 19  
Vaccination / Exemption  
Expires: 30 September 2023

Valid



# Support

- Want more information on other items mentioned today?
- Visit [Supplier Administrator Support Page](#) for links including:
- [Interactive Courses](#)
- [On Demand Videos](#)
- [Supplier Portal Page](#) containing user guides and videos
- Contact Pegasus Support:
- Phone AU 1300 441 433 Monday – Friday 7am – 7pm AEST  
Phone NZ 0800 700 163 Monday - Friday 7am – 7pm NZ
- Email: [support@pegasus.net.au](mailto:support@pegasus.net.au)