

# User Guide

## Associating a contractor to site from pending data

### STEP ONE | Associate contractors within pending data

At the Realm level click Show near the Pending Data/Incomplete Actions

Welcome To Your Corporate Realm 

► Click home in the menu bar to redisplay this page any time during your session.

#### Enter Other Webs

Site:  representing

**Pending Data / Incomplete Actions**

In the dropdown under pending data, choose **Cardholder Associations** and Click Apply

**Pending Data** Type:  Limit:  Source:  Filter By:

**Incomplete Actions**

**Latest Version 2.156.**

**New Features**

- **Multiple Companies**  
Cardholders may now w
- **Default Companies**  
Cardholders have a real
- **End Employment**  
When employees leave
- **Company Relationship**  
Notification emails are no

-- Please select --

Companies

Company Associations

Compliance Certs

Compliance SMS Reviews

Cardholders

Cards

**Cardholder Associations**

Bookings

Assessments

Verified Docs

Verified Doc Competency Uploads

-- All --

are not yet multiple-company aware.

ment instead of having to inactivate them.

s created.

Click Show next to the cardholder associations section

**Pending Data** Type:  Limit:

Cardholder Associations: Count: **32** Sort by:

Click into the cardholder you want to process

**Pending Data** Type:  Limit:  Source:  Filter By:

Cardholder Associations: Count: **1** Sort by:

Name	ID	Company	Due Date	Source	For Realm/Site	Submitted On	Submitted By	Comment
Blackmore, Joe	605753	Pegasus Management Pty. Limited [Training Data]		PORTAL	Realm: Pegasus Demonstration	23 Jan 2020	Donna Thomas	Status update.

If you approve the cardholder click the tick box and the Approved button

## Process Cardholder Association of Joe Blackmore with Pegasus Demonstration

### 1. Contractor Details

Name: Joe Blackmore  
Date of Birth: 01 Jan 1977  
Company: Pegasus Management Pty. Limited [Training Data]

### WARNING

You are about to establish an association between Joe Blackmore and Pegasus Demonstration. That association will enable access to **personal information** about Joe Blackmore. Ensure that you have the appropriate authority from the owner of the personal information prior to establishing this association.

Please ensure this association is established in accordance with the **site's privacy policies** and the **Privacy Act 1988 (Cth)**. If you are unsure, please seek appropriate legal advice.

If you proceed, you will be recorded as the person who established this association. You or your employer may be personally liable for any damage resulting from any unauthorised use of the personal information.

I approve the association of **Joe Blackmore** with **Pegasus Demonstration**.

▶ **Reject** this contractor to prevent them from being associated.

▶ **Approve** the association of this contractor. To enable the approve button, tick the approval box above.

If you want to reject the cardholder, click the Reject button enter the reason and click apply

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I approve the association of **Joe Blackmore** with **Pegasus Demonstration**.

cancel

reject

approve

▶ Please explain **why this contractor should not be associated**.  
Your explanation will be emailed to this company's representative.

Not Allowed at site

apply