

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

The screenshot shows the software interface with the following elements:

- Pending Data** section with a dropdown menu set to "Cardholder Associations".
- Filter options: Limit: First 10, Source: Portal, Filter By: Nothing, and an apply button.
- Incomplete Actions** section.
- Latest Version 2.156** section.
- New Features** section with a list of updates:

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

The dropdown menu under "Pending Data" is open, showing the following options:

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

Click Show next to the cardholder associations section

Pending Data Type: Limit:

Cardholder Associations: Count: 1 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
heasman, Van	466858	Heasman, Van Eric		PORTAL	Site: Onsite HQ	24 Jul 2018	Van Eric Heasman	Status update.

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

Process Cardholder Association of Van heasman with Onsite HQ

1. Contractor Details

Name: Van eric heasman
Date of Birth: 19 Apr 1994
Company: Heasman, Van Eric

WARNING

You are about to establish an association between Van heasman and Onsite HQ. That association will enable access to **personal information** about Van heasman. 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 Van heasman with Onsite HQ.

- ▶ **Cancel** pending processing. Your home page will list the unprocessed pending data.
- ▶ **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 Van heasman with Onsite HQ.

cancel

reject

approve

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

Not allowed on site

apply