

# Pegasus<sup>TM</sup>

Powered by Onsite



## WORKER ROLE PORTAL

FULL USER GUIDE  
V1.3

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# Log Into Worker Portal



## LOGIN

Select, “Company Admin”  
Enter your username and  
password and “Login”.

If prompted, enter your  
company name and  
“select”.

- Follow this guide this step-by-step guide to register new workers or manage existing workers in the Contractor Management System
- For Company Administrators, Select the **Company Admin** option before logging in. This will ensure you are correctly signing in to manage all of your company’s workers.
- For the correct Worker Roles portal you want to enter, head to: <https://Pegasus.net.au/contractors> and open the Client’s Contractor facing information page for more detail. The correct portal link page will be listed there.
- For all things Worker Portal Related head to <https://kb.Pegasus.net.au/display/occs/Worker+Portal>

Pegasus  
Powered by Onsite

## Welcome to the Pegasus Portal

What is your role?

COMPANY ADMIN WORKER

### Company Admin Portal

Login to manage roles and competency checks for your company's *workers*.

Username

Password

LOGIN

Register  
Recover my password  
Login with Pegasus Account

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# Log Into Worker Portal



## INDIVIDUAL WORKER PORTAL

Not all Portals have this feature. The option will be shown on Portals that supports it.

Look to the user guide on that Portal's Help & Resources Page for more information

- If your portal has the Individual Worker Login feature, this will show as the “WORKER” option on the portal login screen.
- Using your personal Onsite Track Easy Username and Password, this will allow you to login and view your profile in this portal. *You must have been previously invited by your Company Administrator.*
- The Individual Worker Portal is not covered in this user guide, but more information can be found here: <https://kb.pegasus.net.au/display/OCCS/Individual+Worker+Portal>

Pegasus

### Welcome to the Pegasus Portal

What is your role?

COMPANY ADMIN WORKER

#### Worker Portal

Complete *your* registration, add new roles to *your* account.

Onsite ID

Password

LOGIN

Register  
Recover my password  
Login with Pegasus Account

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# Log Into Worker Portal



The home page allows access to Manage Roles, Manage Employees, and Pending Actions

- Once logged in you will see the options:
  - Home
  - Manage Companies ( if applicable – not covered in this guide )
  - Manage Roles
  - Manage Employees
  - Manage Assets ( if applicable – not covered in this guide )
  - Company Relationships ( if applicable – not covered in this guide )
  - Pending Actions
  - Logout

The screenshot shows the Pegasus Worker Portal interface. The top navigation bar includes the Pegasus logo, the user email 'dchallen@pegasus.net.au', the company name 'PEGASUS MANAGEMENT PTY. LIMITED', and a notification bell. A left-hand sidebar contains a menu with icons for Home, Manage Companies, Manage Roles, Manage Employees, Manage Assets, Pending Actions, and Logout. The main dashboard area is a grid of six tiles. The top row contains 'Manage Companies' and 'Manage Roles'. The middle row contains a large image of a construction site with a crane and a 'Pending Actions' tile with a bell icon. The bottom row contains 'Manage Employees' and 'Manage Assets'. The 'Manage Assets' tile features a background image of a train track at night.



# WORKER REGISTRATION

# Worker Registration – Adding New Employee

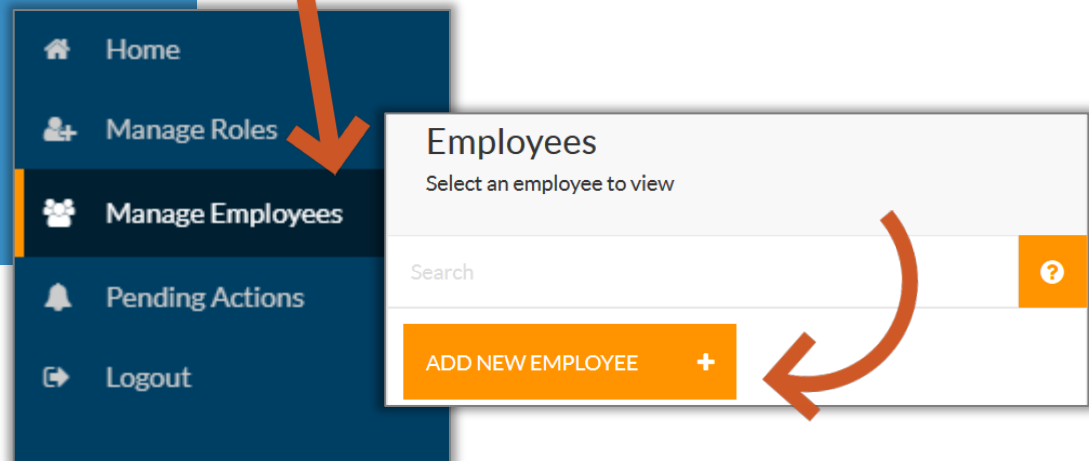


## STEP 1

On the home page, click “Manage Employees”.

Search for an existing worker or add a new worker.

- This is where you will enter your company’s Workers. If required, you will order their site access cards and book inductions
- Use the system to update Worker profiles and information, or to add competencies and skills
- If you are not adding a new Worker, but wanting to manage an existing one, skip to page 9 to check if that Worker has a Subscription for the portal.



# Worker Registration – Adding New Employee



## STEP 2

Upload a photo and enter the employee's details.

Scroll and complete all fields, then click "Save & Close".

- The information entered here will be displayed on the Worker's Pegasus profile
- If the Worker is a contractor and not an employee of your company, tick the box next to "Contractor"
- Read the Terms and Conditions and tick the box to create a new Worker in the system
- We can now continue to add roles, assign to sites, and upload documents for this Worker, after paying a subscription (if required)

**Personal Details**  
Create a new employee

Person

Photo Upload  
Upload

Contractor

\* Agree to Terms and Conditions

Back to Manage Employees      **SAVE & CLOSE**



# Worker Registration – Adding New Employee



## STEP 3


You can process the payment for the worker's subscription (if required) at a later time.

Or click “Subscription” and pay before proceeding to add roles to Employee

- If you need to leave the process and come back at a later time, log out or process the payment and then log out. The card application will be under Pending Actions > Continuing Applications
- If you are completing the process now, click on the Subscription tab and follow the process to pay for that Subscription (if applicable)
- *A Paid Subscription is required for some portals before being able to add Roles*
- For payment process, refer to the Shopping Cart section later in this guide

### Manage Employee

Manage a selected employee



**Citizen, John**  
ID# 2307180  
**Submitted**

DOB: 01/01/1970    Gender: Male  
Phone: 0412345637    Email: test@tester.com  
Address 123 test st, Testville, NSW 2000 AU

Subscription Not issued - Add to cart >

Work Roles 0 0 0 >



# MANAGING A WORKER'S SITES

# Adding Sites

## STEP 1

On the “Manage Employees” page, search for the worker and click on the worker. Then under their profile click “Work Roles”.

This will open the “Manage Roles” section.

- NOTE: This section has assumed that the Worker already has a Subscription (if applicable), as this is a prerequisite for adding Sites and Roles. *Please note that not all Portals use this feature.*
- Multiple sites can be added at once
- Worker must be associated to a site to work there
- If you do not see the site access required, check that you are in the correct portal

The screenshot displays the Pegasus Management System interface. The top navigation bar shows the Pegasus logo, user ID 918261, and company name PEGASUS MANAGEMENT PTY. LIMITED. The sidebar on the left contains navigation links: Home, Manage Roles, Manage Employees (highlighted), Manage Assets, Pending Actions, and Logout. The main content area is titled 'Employees' and shows a search bar with 'jacq'. Below the search bar is an 'ADD NEW EMPLOYEE' button. A list of employees is shown, with 'Bracey, Jacqueline' highlighted. A red arrow points from this entry to the 'Manage Employee' profile page. The profile page displays the employee's photo, name 'Bracey, Jacqueline', ID# 533586 (Approved), DOB: 05/02/1977, Gender, Phone: 0402693892, Email: peteram69@yahoo.com.au, and Address: 426 King Street, Newcastle, NSW 2300 AU. The 'Work Roles' section shows three roles (two green, one red) and buttons for 'Re-invite / Reset Password' and 'End Employment'.

# Adding Sites

## STEP 2

If no Sites are previously selected, you will be prompted to select a site first.

Click “ADD SITE”

Choose the sites the worker will be at, then click “ADD # SITE”

- Multiple sites can be added at once
- Roles can not be chosen/managed until sites are selected first
- If you do not see the site where access required, check that you are in the correct portal
- Other company administrators can see what sites this Worker is associated with in the Portal, so that may help when managing employees. Where possible, only add sites Worker will be attending. You can remove site associations if Worker no longer needs to attend that site.

**Sites/roles for Jacqueline**  
Select all roles for Jacqueline or the site they are working on

Jacqueline must have a minimum of a single site before they can proceed. Select **ADD SITE** to continue.

Back to Manage Employees    **ADD SITE**

Close

**Add site associations**

Search

Onsite HQ

**Pegasus Demonstration** ✓

**ADD 1 SITE**

# Adding Sites

## STEP 3

Selected Site(s) added will now be displayed for the Worker.

Click on “All Roles” tab, this will open the option to add or manage roles on the right of the screen.

Roles can now be added if required.

- You MIGHT get roles added automatically depending upon the site and the Portal you are in.
- If you have had roles automatically added, these are a Site requirement and need to be completed. Site will be looking for these roles to be complete and active.
- If you delete a role, you can re-add it.
- Adding new roles are covered in the next section of this guide

The screenshot displays a two-pane interface. The left pane is titled 'Sites/roles for Jacqueline' and contains a sub-header 'Select all roles for Jacqueline or the site they are working on' and a trash icon. Below this are two tabs: 'All Roles' (highlighted in orange) and 'Pegasus Demonstration'. A red arrow points from the 'All Roles' tab to the right pane. The right pane is titled 'All roles for Jacqueline Bracey' and features a search bar with a question mark icon. At the bottom, there are three buttons: 'Back to Selected Employees' (grey), 'ADD SITE' (orange), and 'ADD NEW ROLE' (orange).



# SHOPPING CART PAYMENTS


# Shopping Cart Payments



## STEP 1

Review the shopping cart prior to processing payment.

Click the “Shopping Trolley” icon to continue.

- Payment depends on the portal system and may be for adding or updating a subscription, applying for cards, and some roles and inductions.
- If something requires payment, the shopping cart  will be highlighted at the top of the page
- Multiple items can be paid for at the same time.
- You can continue in the system and return to the Shopping Cart later, to pay items in one go.

[Close](#)

**Employee has been added to your cart**

This employee has been added to your cart as they do not have a card yet.

OK

[Close](#)

**Would you like to pay now?**

This will enable your Employees to get their ID Checks and submit their Role updates.

CHECKOUT NOW

[I don't want to checkout now](#)

# Shopping Cart Payments



## STEP 2

Review the shopping cart prior to processing payment.

Click “Checkout \$” to proceed.

- Payments can be processed by credit or debit card, or Purchase Order (upon prior approval)
- A tax invoice will be produced and will also be emailed on successful payment.
- Items can be removed from shopping cart

### Checkout Successful!

Company: [blurred] Tax Invoice: [blurred]

Item No.	Item	Quantity	Price/unit	Total
IT001	Card Purchase	1	\$40.00	\$40.00
IT001	Registration, Subscription, Roles, Card for [blurred]	1		\$40.00
			Subtotal:	\$40.00
			Tax (10%):	\$4.00
			<b>Total:</b>	<b>\$44.00</b>

[Download Invoice](#) [Continue Processing Employees](#)

918261 PEGASUS MANAGEMENT PTY. LIMITE

Dashboard / Checkout

### Shopping Cart

Item No.	Item	Details	Quantity
IT001	Card Purchase		1
IT001	Registration, Subscription, Roles, Card for John Citizen.	<a href="#">Edit</a>	1

Subtotal: \$40.00  
Tax (10%): \$4.00  
**Total: \$44.00**

[Dummy](#) [Dummy PO](#) [PayPal / Credit Card](#) [Checkout \\$](#)

[Purchase Order](#)  
[Back](#)





# ADDING ROLES

# Worker Registration – For New or Existing Employees

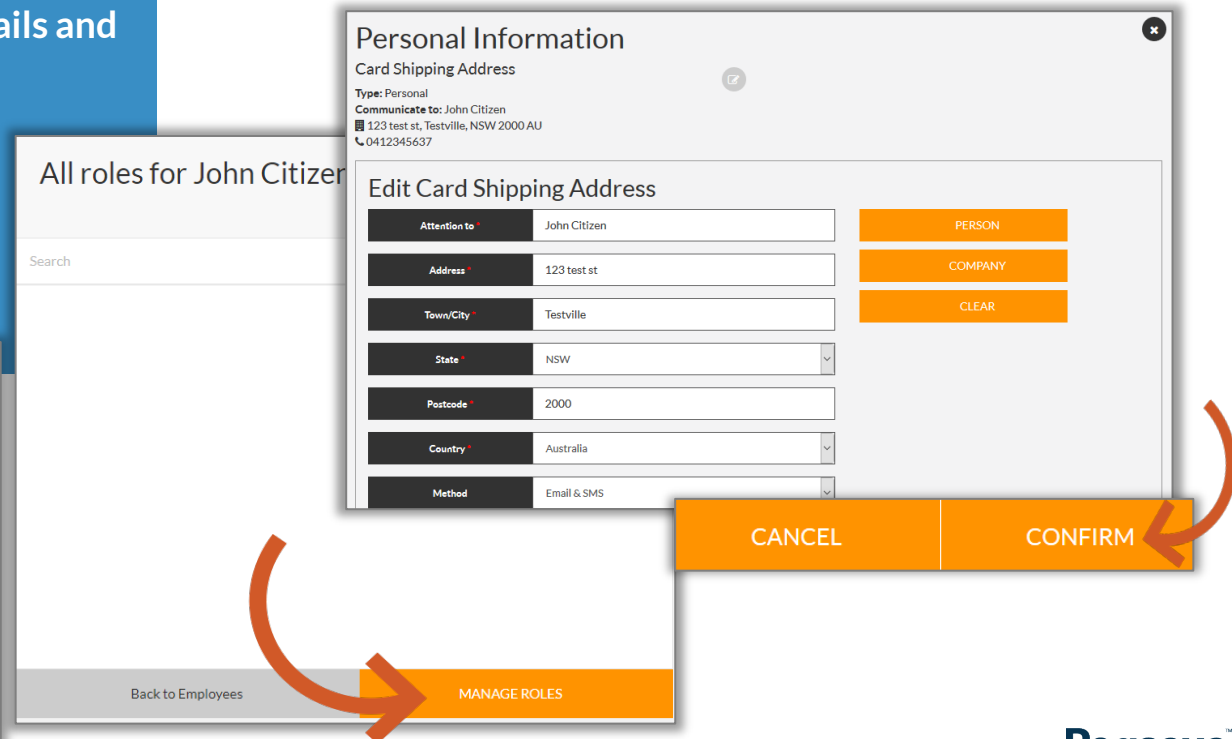
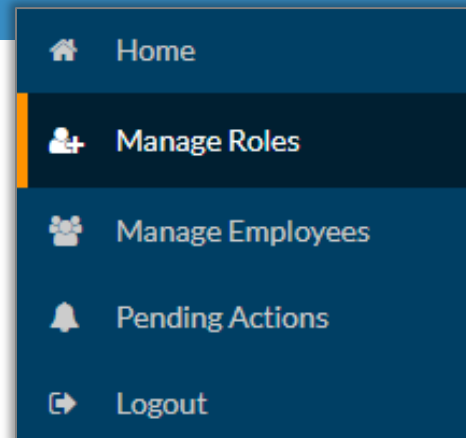
## STEP 1

Click “Manage Roles”.

Search for Employee you wish to manage. If Employee has no Subscription, you will be prompted to confirm the worker’s details and card shipping address if a card is required.

Press “CONFIRM” when done

- The shipping address can be the worker’s or your company. Simply click the buttons on the right to change details
- Scroll down to view all of the information and click “Continue”
- A screen confirms this worker was added to the shopping cart. We will return to the shopping cart later
- *A Paid Subscription is required for some portals before being able to add Roles*



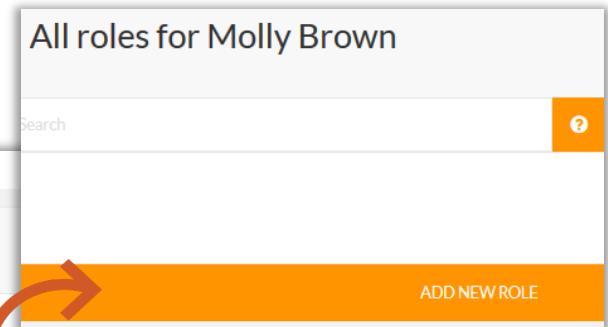
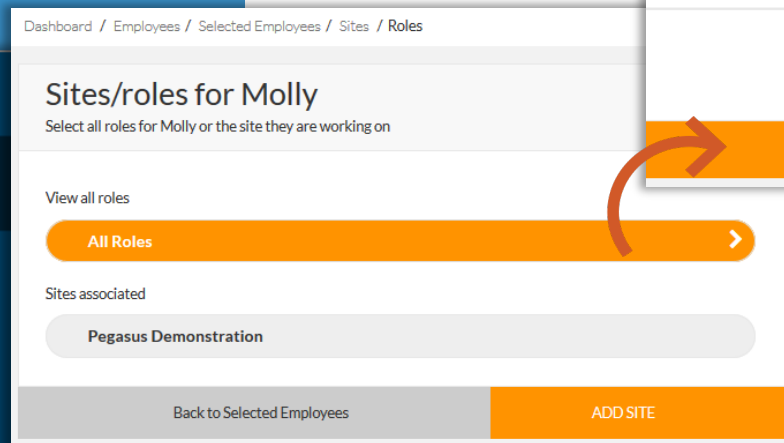
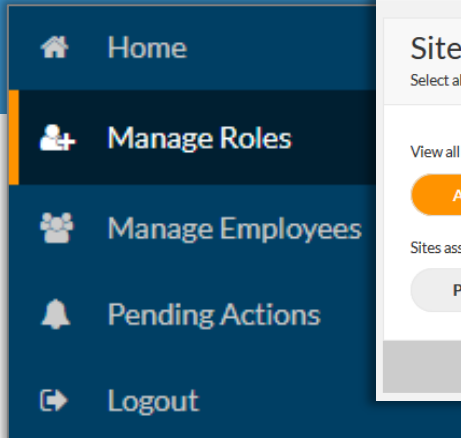
# Worker Registration – For New or Existing Employees

## STEP 2

Under the “Manage Roles” section, for your selected worker, click “All Roles”

If Worker already has Roles already they will be displayed. If none, click on “ADD NEW ROLE”.

- Step 2 assumes Employee has a subscription.
- Step 2 Assumed you have already assigned at least one Site to your worker.
- A list of site approved roles will be displayed. Roles are descriptions of what task the worker will be undertaking at sites but may not reference a title.
- Roles are set by site. If you cannot find a suitable one to select, speak to your site contact
- Multiple roles can be selected at once



# Worker Registration – For New or Existing Employees

## STEP 3

Click an added role to open the document upload section.

Click on the competency you are uploading against and then click “Select or Upload Document”.

Complete all relevant information then click “Save & Next”.

- You need to upload a document that meets the role requirements. The document will need to be scanned and saved to your computer to do this
- The system will step through all the competencies listed. Mandatory items must be uploaded to submit the application.
- The Document Library will store previously uploaded documents to save you having to re-upload

**Add New Roles**

Search

- Boilermaker - Metal Fabricator
- Carpenter - Qualified Supervisor
- Delivery Driver
- Electrician - High Voltage Electrician
- Electrician - Master Electrician
- Plumber - Master Plumber
- Plumber - Mechanical Services
- Site Worker** ✓
- Trade Generic - Boilermaker

ADD 1 ROLES

**Competencies for Moll**

Role Site Worker

Search

**MANDATORY**

- OH&S-WHS.Certificate.Work Safely in the Construction Industry - White Card
- Safety.Induction.Demonstration Course
- Photo

**OPTIONAL** 1/2

- Emergency Response.Certificate.Provide First Aid

Back to Employee Roles

**Competency**

OH&S-WHS.Certificate.Work Safely in the Construction Industry - White Card

Select evidence for: OH&S-WHS.Certificate.Work Safely in the Construction Industry - White Card

Select or Upload Document

Save & Course Selector

# Worker Registration – About The Document Library



The Document Library supports PDF, DOC, JPG, JPEG, XLS, TXT, DOCX, XLSX files

Uses the normal interface to upload files according to your operating system

Select the file to upload against the required competency and select “Open” to upload to the Document Library

- You need to upload a document that meets the competency business rule requirements. The document will need to be scanned and saved to your computer to do this
- Previously uploaded documents will show for this employee, if used before and if still stored in your internet browser cache.

**Competency**  
OH&S-WHS.Certificate.Work Safely in the Construction Industry - White Card

Select evidence for: OH&S-WHS.Certificate.Work Safely in the Construction Industry - White Card

Select or Upload Document

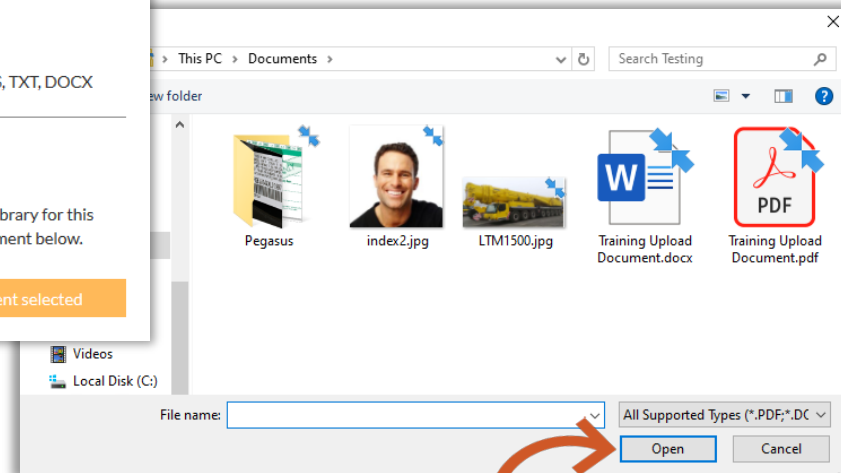
Save & Course Selector

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

Select None

You don't have any documents stored in the library for this employee yet. Start by uploading a new document below.

Upload new document No document selected



# Worker Registration – The Document Library

## Document Library

Select or upload the document required

Allowed file types: PDF, DOC, JPG, JPEG, XLS, TXT, DOCX

Edit Select None

Upload new document Select 2 documents ✓

- Multi-Page PDF documents are read by the library and pages are extracted so they can be previewed. Arrow in bottom right of each icon allows to preview file in new window to see contents in more detail
- Multiple documents can then be selected if needed to supply correct evidence for the competency you are uploading evidence for
- Can upload additional documents if necessary (if evidence is across a PDF and Word document for example) and they can also be selected together when uploading the evidence
- Word Documents are NOT extracted. You can only select the word document as evidence, you can not preview it.
- No limit on uploads to library or against competency when uploading evidence.

## Competency

OH&S-WHS.Certificate.Work Safely in the Construction Industry - White Card

Select evidence for: OH&S-WHS.Certificate.Work Safely in the Construction Industry

Select or Upload Document

Add more documents

Extra information required:

Group \* OH&S-WHS.Induction.Construction QLD

Issue Date dd/mm/yyyy

# Worker Registration – The Document Library

Edit

Select None

## Document Library

Select or upload the document required

Allowed file types: PDF, DOC, JPG, JPEG, XLS, TXT, DOCX

Finished Editing

Remove All



- Select Edit in Document Library to edit what current documents are visible for this worker.
- Old documents will be displayed, if previously uploaded. Use the EDIT button to display the option to DELETE the documents no longer required to stay in the Document Library for ease of access.
- Click the “X” next to each document to instantly remove it from the Document Library. This will NOT remove it from the Workers competency. It just removes the quick access to that document. You can always re-upload the document if the incorrect one was deleted.
- Once finished editing the document in the library, click “Finished Editing” to return the Document Library view back to the normal layout.

# Worker Registration – Upload Proof or Do Training

## OPTION

Click on the Competency next in your list. If applicable this following options will appear.

“Select Training” or “Upload Documentation”

Choose the relevant option, undertake any action required, then press Save and Next to continue.

- Some Roles will offer a new option - Select Training or Upload Documentation
- These are recognisable by the University Icon next to the competency.
- Process is the same as Training or Uploading documents, but the feature is available under the one competency to do should that competency allow for that option.
- Only one selection is required here. Click on Business Rules button if unsure of what evidence to supply for this competency,

### Competency

Site.Induction.Acciona GMR4 – Site Establishment & Delivery

Business Rules

EITHER SELECT AN APPROPRIATE TRAINING COURSE TO FULFIL COMPETENCY REQUIREMENT  
OR  
UPLOAD SUPPORTING DOCUMENTATION IF ALREADY COMPLETED

**Select Training** Upload Documentation

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

Next

### Competency

Site.Induction.Acciona GMR4 – Site Establishment & Delivery

Business Rules

EITHER SELECT AN APPROPRIATE TRAINING COURSE TO FULFIL COMPETENCY REQUIREMENT  
OR  
UPLOAD SUPPORTING DOCUMENTATION IF ALREADY COMPLETED

Select Training **Upload Documentation**

Select or Upload Document

Save & Next



Upload Proof or Do Training



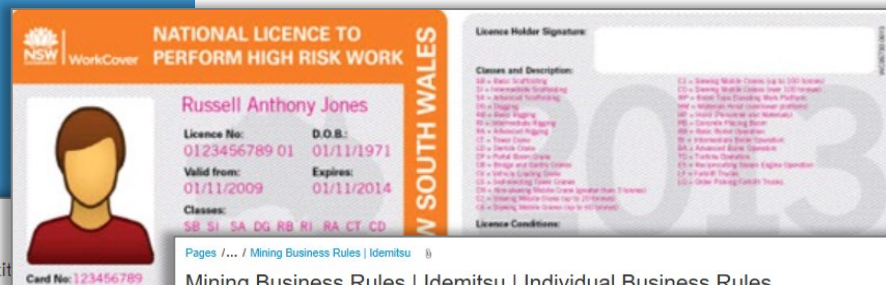
# Worker Registration – Note on Business Rules



## BUSINESS RULES FOR ROLE AND COMPETENCY REQUIREMENTS

Click on the Business Rules link in the file details section.

- The Business Rules will help you understand the information that must be supplied to meet role requirements.
- Business rules will display the document and upload requirements, and an example document. Competency expiry periods may also be noted.
- Uploading the correct document(s) will ensure a smoother application of roles to your worker. Incorrect documents will be returned to the submitter and can cause delays in role applications.
- If you wish to view all the business rules for this client, visit their Contractor page by clicking on the relevant tile at <https://Pegasus.net.au/contractors>



# Worker Registration – For New or Existing Employees



## STEP 4

After documents are uploaded and evidence supplied, for each Mandatory Competency, Submit button will appear.

Click “SUBMIT” to finish processing role(s) for worker

- Once documents selected against the competency, the option to add further documents can be done if needed with the “Add more documents” link
- Complete any mandatory fields, marked with an Asterix, to complete the competency upload process.
- Depending upon Role applying for, will either require online or classroom course sections
- If a Role requires a Course booking, it will NOT display at this time, but remain pending until supplied documents are approved first.

**Competency**  
OH&S-WHS.Certificate.Work Safely in the Construction Industry - White Card

Select evidence for: OH&S-WHS.Certificate.Work Safely in the Construction Industry

Select or Upload Document

MEDICAL REPORT  
MEDICAL REPORT

Medical Certificate

[Add more documents](#)

Extra information required:

Group *	OH&S-WHS.Induction.Construction QLL
Issue Date	dd/mm/yyyy

Cancel Save

Save & Course Selector

## Congratulations!

The following employee applications have been submitted for verification:

Molly Brown

OK

You will be advised by email the outcome of the verification process.

# Pending Enrolments Until Documents Approved



## NOTE

If Portal has feature enabled, details will show when prompted to continue with:

1. Online Courses
2. Classroom Courses

- Notes below will appear in portals with this activated
- Does not stop Portal Administrator from continuing with the Worker Role application
- Training related emails will follow once documents to be submitted, are approved.
- Should Worker application be returned; documents will need to be actioned, re-submitted and approved, before training enrolments will be sent.

## Competency

2

Site.Procedure.Moolarben - Personal Electronic Devices

### Classroom Courses

Enrolment in this training course will not be available until all documents have been verified and approved. On approval, you will be emailed instructions to enrol your worker and select a classroom session.

Enrol in required courses for competency?

[Next](#)

[Checkout](#)

1

## Competency

Generic.Induction.Yancoal Generic Induction

**About Training:** This induction applies to all employees and contractors working on a Yancoal Site. It provides key information on our people, values, safety and environmental procedures

### Online Courses

Enrolment in this training course will not be confirmed until all documents have been verified and approved. On approval, an email with instructions to complete the online training will be sent.

Enrol in required courses for competency?

[Next](#)

[Checkout](#)



# **PENDING ENROLMENTS UNTIL DOCUMENTS APPROVED**

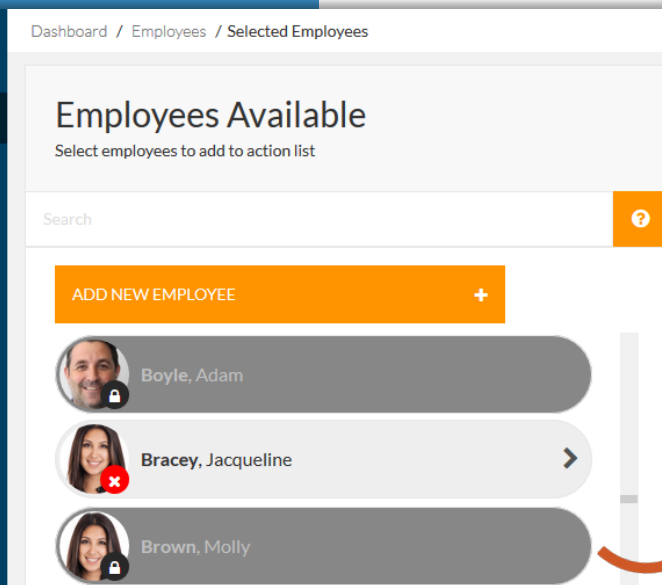
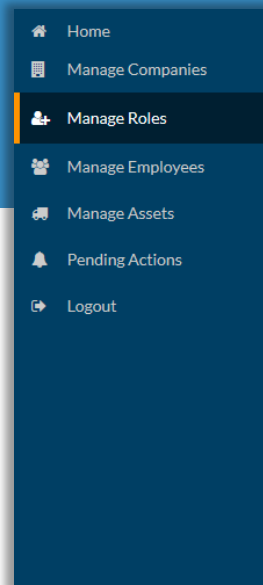
# Pending Enrolments Until Documents Approved



## STEP 5

Once all uploads are completed and role has been submitted, the worker is now locked, pending document approval from Pegasus

- NOTE: if multiple roles are being added at same time, documents for ALL ROLES need to be uploaded before SUBMIT button is available.
- Processing times for application submissions will vary per client site however the standard processing timeframe is up to 2 business days .
- Can now process other workers if necessary
- Portal Administrator that processed this Employee will be notified via email of approval/application return status.
- Can view under Pending actions if Company Administrator is away and has been returned in their absence. Notes will be listed in Pending Actions if some action are required to re-submit.



Status key	
Symbol	Value
	Subscription current
	Subscription expiring
	No subscription or subscription expired
	Pending card submitted

# Pending Enrolments Until Documents Approved



## SUBMISSION PROCESS

After Portal User submits role application

Documents are viewed and verified where appropriate by Pegasus

Once all approved, Verification email sent to Portal User and Worker

- New feature added to configured Worker Role portals.
- Training enrolments are NOT sent through to the worker until uploaded documents are approved first, can take up to 48 hours to be actioned.
- If Application is returned to Portal Administrator, requested action MUST be resolved, role re-submitted and verified BEFORE training enrolments will be sent.
- Once documents are approved, Portal Administrator and the relevant Worker are informed.

### Congratulations!

The following employee applications have been submitted for verification:

Joe Blackmore

OK

You will be advised by email the outcome of the verification process.

### Receipt/Tax Invoice 937979



Pegasus Safety Online <do\_not\_reply@onsitetrackeasy.com.au>  
To: Damien Challen



Receipt Tax Invoice 937979.pdf  
76 KB

Dear Damien Challen,

Thank you for purchasing online from Pegasus Safety.

The attached receipt/tax invoice is your reference for any inquiries relating to this purchase.

Yours sincerely,  
Pegasus Safety

Dear Damien Challen,

The following person has been approved for Yancoal portal registration.

**Person:** Joe Blackmore

**Company:** Pegasus Management Pty. Limited [Training Data]

**Approved By:** Damien Challen

**Approved On:** 17 Sep 20 at 21:12

# Pending Enrolments Until Documents Approved



## STEP 6

Any enrolled training is now sent to the Portal admin and the Worker

1. Online courses can be started now by the Worker
2. Classroom Courses require Session Selection

- Portal administrator that submitted the role application gets a copy of training emails for reference or to action if required.
- Click on the hyperlinks to launch training content
- Classroom courses require choosing a date/time to attend

2

## Yancoal Australia Enrolment Approved

Hello Joe Blackmore,

As part of your compliance to work for Yancoal Australia you must successfully complete the following training which has just been approved -

Moolarben General Induction V2

This is a classroom course so you will need to select the session that you wish to attend by clicking the 'Select Session' button below, or by pasting the link below into your browser.

Select Session

<https://qa.onsitetrackeasy.com.au/training-service/enrolment/cf6b389c-30e1-4691-92c7-0a04e1daa497/select-session>

1

## Yancoal Australia Enrolment Approved

Hello Joe Blackmore,

As part of your compliance to work for Yancoal Australia you must successfully complete the following training which has just been approved -

[Yancoal Generic Induction](#)

# Pending Enrolments Until Documents Approved



## STEP 7

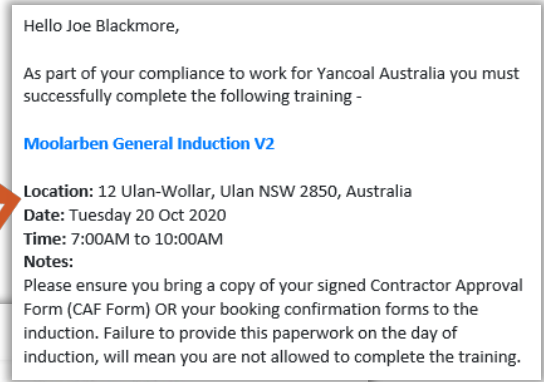
### Classroom Courses Prompt for Session Selection

Choose Suitable session and press Select

Press Save to confirm session time

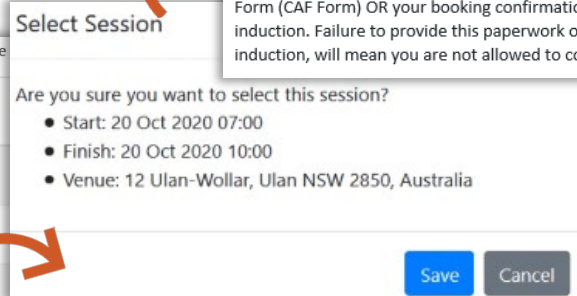
Email is sent to Worker and Portal Admin as confirmation

- Portal administrator that submitted the role application gets a copy of Date/Time of session selected for reference
- Once selected, Session Date/Time are locked in.
- Additional notes regarding course requirements, location, site requirements etc will be in the email
- Microsoft Calendar file attached to booking, for additional reminder in worker and Portal Administrators calendars



Please select session for *Moolarben General Induction* from the

Date	Start	Finish	Available Seats	
Tuesday, 22 Sep 2020	07:00	10:00	unlimited	
Tuesday, 6 Oct 2020	07:00	10:00	unlimited	
Tuesday, 20 Oct 2020	07:00	10:00	30	<a href="#">Select</a>
Tuesday, 3 Nov 2020	07:00	10:00	30	12 Ulan-Wollar, Ulan NSW 2850, Australia <a href="#">Select</a>
Tuesday, 17 Nov 2020	07:00	10:00	29	12 Ulan-Wollar, Ulan NSW 2850, Australia <a href="#">Select</a>







# PENDING ACTIONS

# Pending Actions – Subscription Renewals



**Continuing Applications – Shows any unsubmitted applications that were started by administrators. You can search for a worker and continue, or cancel these applications. Helpful if original person that submitted has changed and you want to continue.**

- Pending actions essentially allows company administrators to check on the status of applications and workers without a lot of searching.
- If you had not originally submitted an application, (i.e. Administrator that did is now on leave) you can see the status of any unfinished items.

- Home
- Manage Roles
- Manage Employees
- Manage Assets
- Pending Actions**
- Logout

### Pending Actions

Please review and complete any outstanding items

- Subscription Renewals
- Returned Applications >
- Continuing Applications >
- Returned Employees >

### Subscription Renewal

ADD ALL TO CART

Person:	Subscription	Expiry Date:	
Ilce Vojdanoski		08/01/2020	Add To Cart

# Pending Actions – Returned Applications



Returned Applications – Any application that does not meet the Client’s Business Rules will be returned to be resolved. You can then re-open the application and correct the item(s) listed as needing to be changed.

- Pending actions essentially allows company administrators to check on the status of applications and workers without a lot of searching.
- If you had not originally submitted an application, (i.e. Administrator that did is now on leave) you can see the status of any unfinished items.
- Common returns are: Incorrect document uploaded (i.e. wrong paperwork for a competency), expired documents uploaded, incorrect photo uploaded that is not in a passport style format.
- Application can be continued and only the returned items will need to be addressed before re-submitting.

- Home
- Manage Roles
- Manage Employees
- Manage Assets
- Pending Actions**
- Logout

### Pending Actions

Please review and complete any outstanding items

- Subscription Renewals
- Returned Applications**
- Continuing Applications
- Returned Employees >

### Returned Applications

Search

<b>Employee Name:</b> Manuel Eduardo	<b>Start Date:</b> 08/07/2019	<b>RETURNED</b> <b>CONTINUE &gt;</b>
---	----------------------------------	---

**Description:**  
Registration, Roles, Card

**Ashlee Woolnough - Wed, Jul 10, 2019 12:02 PM**

Please be advised that the name and date of birth on the licence Manuel [redacted], doesnot match the name and date of birth in the system. If this needs to be updated in the system, please call us on [redacted] or email us at [redacted]

# Pending Actions – Continuing Applications



Continuing Applications – Shows any unsubmitted applications that were started by administrators. You can search for a worker and continue or cancel these applications. Helpful if original person that submitted has changed and you want to continue.

- Pending actions essentially allows company administrators to check on the status of applications and workers without a lot of searching.
- If you had not originally submitted an application, (i.e. Administrator that did is now on leave) you can see the status of any unfinished items.

- Home
- Manage Roles
- Manage Employees
- Manage Assets
- Pending Actions**
- Logout

### Pending Actions

Please review and complete any outstanding items

- Subscription Renewals
- Returned Applications
- Continuing Applications**
- Returned Employees

### Continuing Applications

Select All Search

Person: Tim Workman	Description: Registration, Roles	Continue
Person: Emily Cassidy	Description: Subscription, Roles	Continue
Person: John Patel	Description: Roles	Continue



# Pending Actions – Returned Employees



Returned Employees – Shows any new Employees that were created by an Administrator. Reasons for returning are generally the submitted employee has details that match and existing one in the system, or incorrect data was submitted in application.

- Pending actions essentially allows company administrators to check on the status of applications and workers without a lot of searching.
- If you had not originally submitted an application, (i.e. Administrator that did is now on leave) you can see the status of any returned items
- If Employee Returned, please contact Pegasus Support in order to either merge this new cardholder or have the existing employee found associated with your company.

- Home
- Manage Roles
- Manage Employees
- Manage Assets
- Pending Actions**
- Logout

### Pending Actions

Please review and complete any outstanding items

- Subscription Renewals
- Returned Applications
- Continuing Applications
- Returned Employees

### Returned Employees

Search

Employee Name: Belinda Gannon	EDIT >
Rhiannon Manning - 19/06/2017 Already in the system	
Employee Name: Belinda Gannon 2018 Entry point for new profile for	EDIT >

View Comment



# RENEWING EXPIRING DOCUMENTS

# Renewing Documents



## STEP 1

Click on “Manage Roles” and find the Employee you wish to view.

View the Role you wish to see the Status of.

If the Role has an expiring Competency, it will list the earliest expiring date against the Role.

- Documents that **have** expired will generally be requested when applying for Roles. As that document related to a competency has already expired, then you would follow the normal process on the slides under “Adding Roles” section starting on slide 14.
- Renewing a document that is **due** to expire, you can upload a newer document in advance of it expiring. Once approved, this will then add the updated document to your profile and the competency will then reflect the new end date of that document.
- Some competencies never expire, due to the business rules of the client. Check the relevant business rules for that competency.
- Expiring Competency notifications are sent to Company Administrators and Worker’s email address at both 30 days and 7 days before expiry.

Sites/roles for Jacqueline  
Select all roles for Jacqueline or the site they are working on

All Roles

Pegasus Demonstration

Back to Selected Employees

ADD SITE

All roles for Jacqueline Bracey

Site Worker  
Expires: 07/01/2020

# Renewing Documents



## STEP 2

Click the competency you wish to update.

Click the “Renew document” button

This will open the Document Library page.

- In order to renew a document, the option will only appear after the competency reaches the 30 day expiry period. Prior to this, the “Renew document” option does not appear.
- You can at any time download the existing approved document assigned to the competency by pressing “Download document” and save it to your computer., even if it isn’t due to expire. This is useful if you are requiring to upload this in a different clients portal, or can not easily find the file on your computer.

The screenshot shows a user interface for managing competencies. At the top, it says "Competencies for Jacqueline Bracey" and "Role Site Worker". Below this is a search bar and a list of competencies under the heading "MANDATORY". The first competency is "OH&S-WHS.Certificate.Work Safely in the Construction Industry - White Card" with an expiry date of "Expires: 07/01/2020". A red arrow points from the text "Click the competency you wish to update." to this competency. Another red arrow points from the text "Click the 'Renew document' button" to the "Renew document" button in the expanded view. A third red arrow points from the text "This will open the Document Library page." to the "Download document (153.4 kb)" button. The expanded view shows the text "Select evidence for: OH&S-WHS.Certificate.Work Safely in the Construction Industry - White Card" above the two buttons. At the bottom left, there is a card for "All roles for Jacco" with a "Site Worker" role that expires on "07/01/2020".



# Renewing Documents



## STEP 3

Click on the required option for upload (already in Document Library or Upload new document)

Complete any Mandatory Fields  
Click Save and Submit.

Now will be sent to Pegasus for approval.

- Follow the same steps shown in “Adding Roles” slide 18, to understand how the Document Library works if unsure.
- Additional document evidence can be uploaded against the competency if required. So multiple files can be uploaded and submitted for the competency.
- Not all file uploads require “Group” “Issue Date” “Expiry Date” “Comments” contents to be filled out. If one is Mandatory, you will not be able to submit until it is completed.
- Once Submitted, will then lock profile with Pegasus to approve.

The screenshot displays the Pegasus system interface for document management. It is divided into three main sections:

- Document Library:** A section titled "Document Library" with the instruction "Select or upload the document required". It lists allowed file types: PDF, DOC, JPG, JPEG, XLS, TXT, DOC. Below this, there are buttons for "Edit" and "Select None". A grid of document thumbnails is shown, including a red-bordered "ACMI PLANT OPERATOR VDC Register" document. A red message "Group is required" is visible at the bottom left of this section.
- Form Fields:** A section titled "Add more documents" with the heading "Extra information required:". It contains three input fields: "Group \*" (with a dropdown menu showing "OH&S-WHS.Induction.Construction NSW"), "Issue Date" (with a date picker showing "dd/mm/yyyy"), and "Expiry Date" (with a date picker showing "01/01/2021"). At the bottom right of this section are buttons for "Cancel", "Save", and "Save & Submit".
- File Explorer:** A Windows File Explorer window is open, showing the "Documents" folder. It contains several files, including "Pegasus", "index2.jpg", "LTM1500.jpg", "Training Upload Document.docx", and "Training Upload Document.pdf". The "PDF" icon for the training document is highlighted with a red box.



FOR ANY QUESTIONS OR ASSISTANCE PLEASE CALL

**1300 131 194**

OR EMAIL [support@onsitetrackeasy.com.au](mailto:support@onsitetrackeasy.com.au)