



Contractor Company Pinnacle User Guide

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Important Information

New Plymouth District Council (NPDC) is committed to providing a healthy and safe working environment for our workers and other stakeholders that come into contact with us and our activities.

This Pinnacle user guide contains instructions for completing the pre-qualification process and maintaining your account.



URL: <https://au.beakon.io/npdc>

System Provider:



Preferred web browser:



Additional Help:

[Beakon wikiHow](#)

If you have any further queries, please don't hesitate to contact one of the Health and Safety team.

Phone: 06 759 6060 Email: hseteam@npdc.govt.nz

Prequalification Process

As a contractor, you will need to demonstrate that you understand your duties under the HSWA Act and have processes and procedures in place to manage work safely.

Pre-qualification allows NPDC to understand how your business works, and allows you to understand our expectations around Health and Safety at work.

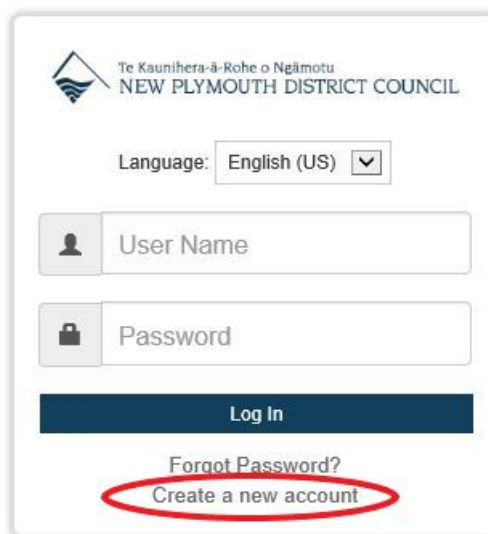
Below we have provided a step by step guide to completing the prequalification process.

Step 1: Apply

Complete an application online:

1.1 Visit the '[Contractor Information](#)' page on the NPDC website and click the link to '**Pinnacle**'.

1.2 Click 'Create a new account'



1.3 Complete the online application form.

Note: Any future email correspondence will be sent to your 'Primary contact' (you may need to check your junk folder).

1.4 Click 'save'. You should receive the following onscreen message and a notification email

Thank you! for registering your interest in becoming a pre qualified contractor for New Plymouth District Council. Once your application has been reviewed we will be in touch.

1.5 Await account activation email from NPDC before proceeding to Step 2.

Step 2: Login

Login to view your assigned tasks. You will be able to do this after you have received the Pinnacle 'account activation' email.

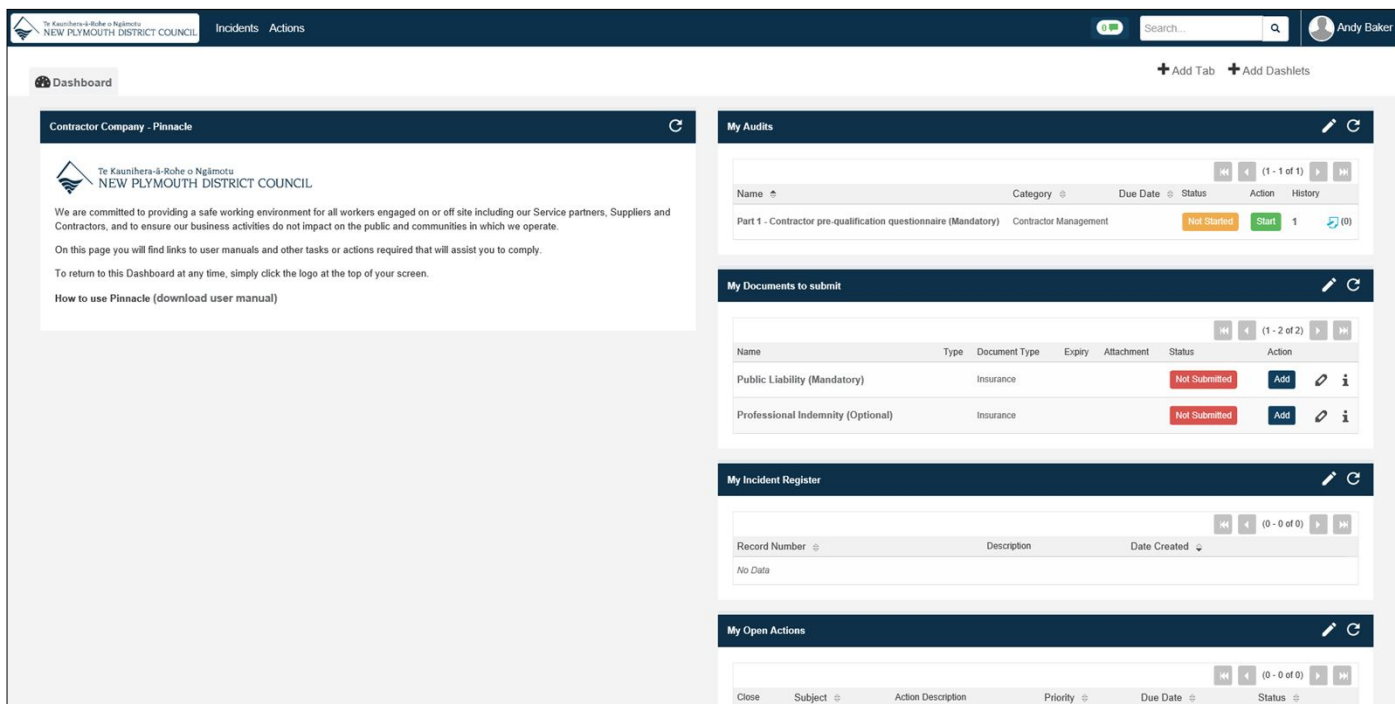
2.1 In your account activation email, log in to Pinnacle by clicking on the URL link and entering your assigned username and password.

Note:

- You will be prompted to set up a new password the first time you login.
- If you forget your password in future, click on the 'forgot password' link on the login page.

2.2 Once logged in you will be taken to your Dashboard/Home page.

Your dashboard will include a welcome message, and display the following 'Dashlets': "My Audits", "My Documents to submit", "My Incident Register" and "My Open Actions".

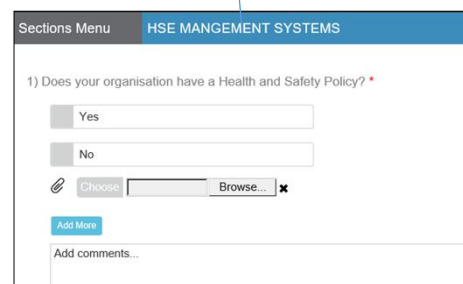
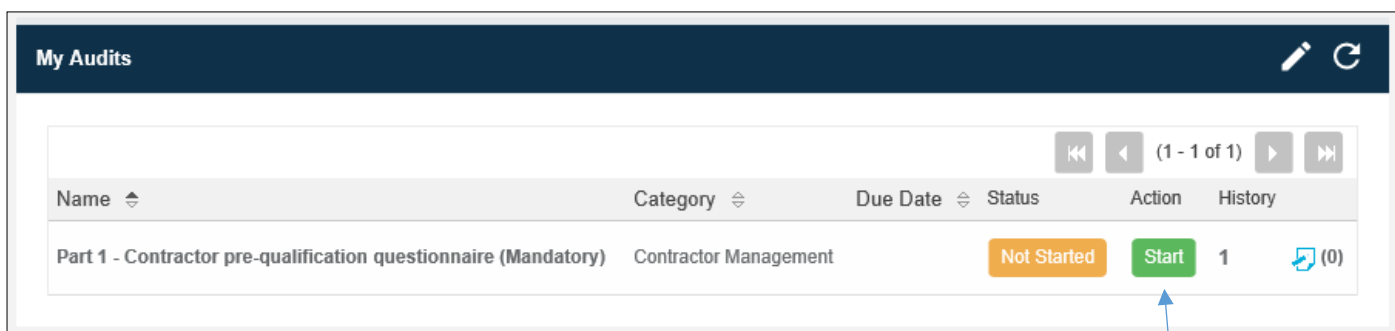


Step 3: Complete assigned tasks

Complete assigned questionnaires and submit required documentation to support your approval:

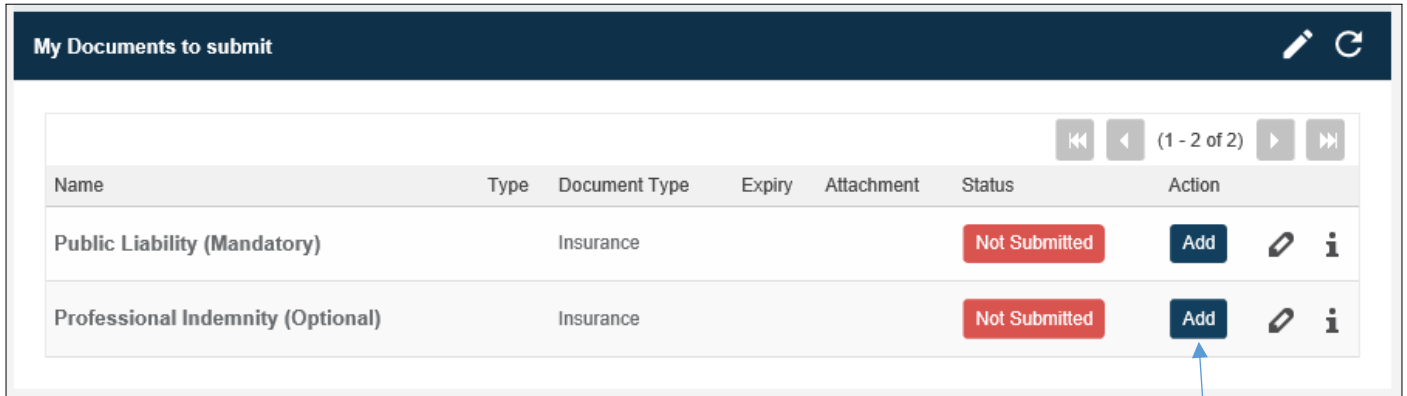
3.1 'My Audits' Dashlet





Click 'Start' button to complete 'Risk-based' contractor questionnaire/s uploading any documentation and supporting evidence required. (Note: You can save progress at any stage by clicking 'Save as Draft' option).

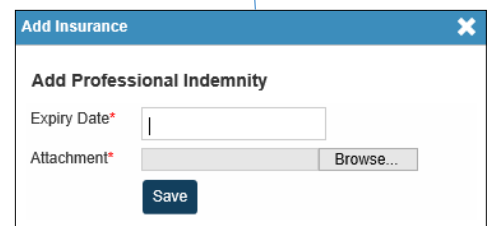


3.2 'My Documents to submit' Dashlet

Click 'Add' button to upload Insurance documents indicating the Expiry Date.



Name	Type	Document Type	Expiry	Attachment	Status	Action
Public Liability (Mandatory)		Insurance			Not Submitted	Add  
Professional Indemnity (Optional)		Insurance			Not Submitted	Add  



Add Insurance ✕

Add Professional Indemnity

Expiry Date*

Attachment*

3.3 Await response

Your application will be reviewed by our Health and Safety Team and the Contract Manager. Please allow up to ten working days for us to complete this process (e.g. 'Request Additional Information' or 'Reject' application). Following this we will be in touch with the outcome of your application.

Account Maintenance

Pinnacle Dashboard

Your dashboard will include a welcome message, and display the following 'Dashlets': "My Audits", "My Documents to submit", "My Incidents" and "My Open Actions".

Click 'NPDC Logo' (top left of screen) to return to the dashboard at any time.

The screenshot shows the Pinnacle Dashboard interface. At the top left, there is a logo for Te Kaunihera-i-Rohe o Ngāmotu NEW PLYMOUTH DISTRICT COUNCIL. The dashboard contains several sections: a welcome message, "My Audits" (showing a table with one entry: Part 1 - Contractor pre-qualification questionnaire (Mandatory), Contractor Management, Not Started, Start, 1), "My Documents to submit" (showing a table with two entries: Public Liability (Mandatory) and Professional Indemnity (Optional), both with Not Submitted status), "My Incident Register" (showing a table with no data), and "My Open Actions" (showing a table with no data). A blue arrow points to the NPDC Logo in the top left corner.

Approval status/company details

To check your approval status and update details:

1. Click on profile picture (top right of screen):

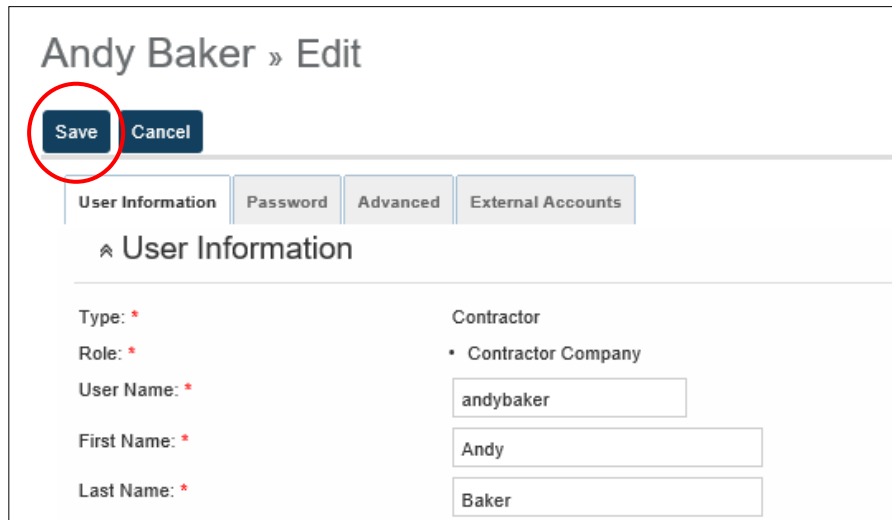


The screenshot shows the Pinnacle Dashboard interface. At the top right, there is a user profile picture and the name "Andy Baker". A blue arrow points to the profile picture. The dashboard content is the same as in the previous screenshot.

Option to:

- Update information (e.g. user name, contact details/personnel and more)
- Update password (click 'password tab')
- Check 'Approval Status'

2. Click 'Save' button after editing:



Andy Baker » Edit

Save Cancel

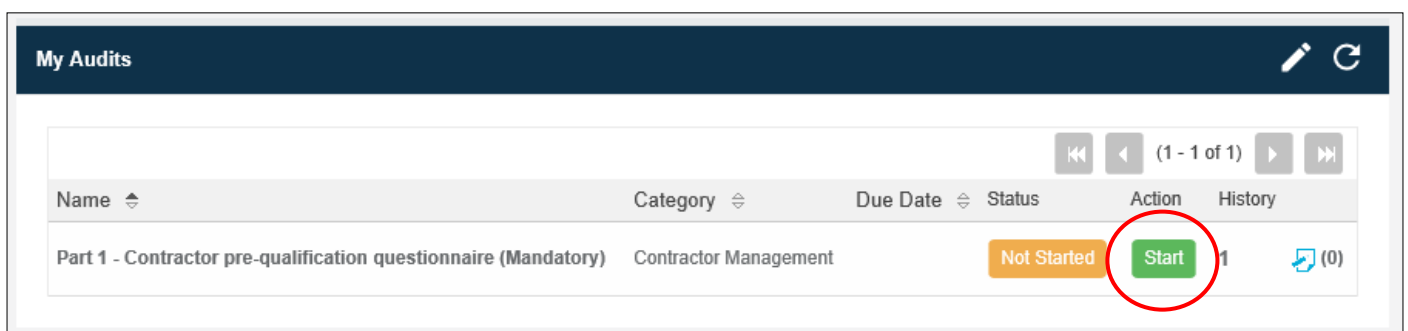
User Information Password Advanced External Accounts


⌵ User Information

Type: * Contractor
Role: * Contractor Company
User Name: * andybaker
First Name: * Andy
Last Name: * Baker

My Audits:

1. To complete any audits that have been assigned to you, click the green box titled 'Start'.



Name	Category	Due Date	Status	Action	History
Part 1 - Contractor pre-qualification questionnaire (Mandatory)	Contractor Management		Not Started	Start	1  (0)

2. Complete the audit/questionnaire (click 'next' button to proceed to next section and use 'Section Menu' to navigate (You can save progress at any stage by clicking 'Save as Draft' button):

Te Kaunihera-ā-Kohe o Ngāimotu
NEW PLYMOUTH DISTRICT COUNCIL

Incidents Actions

0

Andy Baker

Part 1 - Contractor pre-qualification questionnaire

Name: Andy Baker (Andy the Baker)

Audit Name: Part 1 - Contractor pre-qualification questionnaire Date/Time: 20/09/2018 14:58

Description: June 2018 Passing Score (%): N/A

Number of Questions: 14

Sections Menu **HSE MANAGEMENT SYSTEMS**

1) Does your organisation have a Health and Safety Policy? (if yes, upload evidence / if no, comment below) *

Yes

No

✖

3. Once completed, click 'Submit' (bottom of page).

4. A 'success' banner will be displayed (if not, check that all 'required fields' have been completed).

Part 1 - Contractor pre-qualification questionnaire

Results

✔ Thank you for submitting an audit for review!



Note: If you have attempted it and failed, a red box titled 'Failed' will appear. If you have passed, a green box titled 'Passed' will appear, and if you have not attempted it, there will be an orange box titled 'No Attempt'.

My Documents to submit:

You will receive an email notification before a document expires so that you are aware that you need to update it. You should be aware that some documents are mandatory and some are optional.


To submit a new document for approval:

1. Click 'Add' button and in the pop up box select the document expiry date and attach/upload the new document and press 'save':

My Documents to submit  

⏪ ⏩ (1 - 2 of 2) ⏴ ⏵

Name	Type	Document Type	Expiry	Attachment	Status	Action
+ Public Liability (Mandatory)		Insurance	18/09/2018	View	Expired	Add
+ Professional Indemnity (Optional)		Insurance	18/09/2018	View	Expired	Add



Add Insurance 

Add Public Liability

Expiry Date*

Attachment*

2. Status will change to 'pending approval':

My Documents to submit  

⏪ ⏩ (1 - 2 of 2) ⏴ ⏵

Name	Type	Document Type	Expiry	Attachment	Status	Action
+ Public Liability (Mandatory)		Insurance	22/09/2018	View	Pending approval	Add
+ Professional Indemnity (Optional)		Insurance	21/09/2018	View	Pending approval	Add

3. Once approved by NPDC, status will update:

My Documents to submit						
Name	Type	Document Type	Expiry	Attachment	Status	Action
+ Public Liability (Mandatory)		Insurance	22/09/2018	View	Approved	Add
+ Professional Indemnity (Optional)		Insurance	21/09/2018	View	Approved	Add

My Incidents

If you or your employees are involved in an incident or witness one that relates to NPDC business you can report the incident via your login:

1. Click on "Incidents" and "Incident Register" from the menu at the top of your screen and click on the Create button (Right Hand Side of screen).

The screenshot shows the 'Search Incident Register' page. At the top, there is a navigation bar with 'Incidents' and 'Actions' tabs, a search bar, and a user profile for 'Andy Baker'. Below the navigation bar, the page title is 'Search Incident Register'. On the right side, a 'Create' button is circled in red. The main form area contains several input fields: 'Record Number', 'Category' (dropdown), 'Type' (dropdown), 'Date and time observed', 'Reported by', 'Location', and 'Department'. The 'Reported by', 'Location', and 'Department' fields are marked with a red asterisk, indicating they are compulsory. There are also 'Search' and 'Clear' buttons at the bottom left of the form area.

2. Select the category and then type of incident and complete the form. Fields marked with a red asterisk are compulsory. You may attach a copy of your incident report/investigation. Click on 'Save' (top or bottom) to submit your incident to NPDC:

Te Kaunihira-ā-Rohe o Ngāmotu
NEW PLYMOUTH DISTRICT COUNCIL

Incidents Actions

0 12:30 12:30 12:30

Create

Save Cancel Create

Category and Type

Category: * Near Miss

Type: * Person

Details

Date and time observed: * [] [] [] [] [] []

Department: * [] + X

Location: * [] + X

Description: * []

Potential Consequence: []

Contractor Company Involved: Andy Baker + X

Incident Requires ICAM Investigation: Yes No

Reported by: * Andy Baker

Responsible Manager: Test Admin + X

Additional Location Details: []

Immediate Action Taken: * []

Department Responsible for Investigation: [] + X

Attachment: Upload File: [] Browse... Upload

Attachment link: http:// []

Save Cancel

3. Incidents logged will be saved to your 'My Incidents' dashlet on the Dashboard:

My Incident Register		
Record Number	Description	Date Created
INC_2638	What happened...	20/09/2018 12:55

My Actions

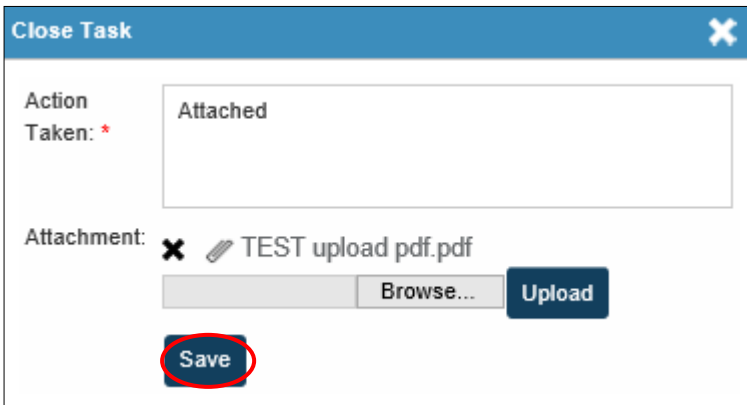
NPDC may assign an 'action' to complete.

How to complete an action:

1. Find 'My Open Actions' dashlet.
2. Select the Action you wish to update and click on the 'X' icon:



3. Add description of action taken and upload evidence then click "Save".



Continued...

- The action will disappear from your 'My Open Action' dashlet. A record will be displayed in the 'Actions register' (click 'Actions' in main menu):

The screenshot shows the 'Search Actions' page. At the top, there is a navigation bar with the council logo, 'Incidents Actions', a search bar, and a user profile for 'Andy Baker'. Below the navigation bar is a search filter section with fields for 'Subject', 'Due Date', 'Status' (set to 'Not Started'), and 'Assigned to'. There are also checkboxes for 'My Items' and 'Open Items', and buttons for 'Search' and 'Clear'. A 'Create' button is in the top right. Below the filters is a table with one record. The table has columns for Record Number, Date Created, Subject, Action Description, Priority, Due Date, Assigned User, Manager Name, and Status. The record shows ACT_441, created on 20/09/2018, related to INC_2638, with the subject 'Investigation' and description 'Please upload a copy of the incident investigation'. The priority is 'Medium', due date is '28/09/2018', assigned to 'Andy Baker', and the status is 'Completed'.

Close	Record Number	Date Created	Related to	Subject	Action Description	Priority	Due Date	Assigned User	Manager Name	Status
<input type="checkbox"/>	ACT_441	20/09/2018 14:17	INC_2638	Investigation	Please upload a copy of the incident investigation	Medium	28/09/2018	Andy Baker		Completed

FAQs:

What does my Contractor Approval Level mean?

You are designated an 'Approval Level' including:

- Approved Services
- Approved Locations
- Induction and NPDC training requirements
- Subcontractor management and autonomy level
 - **Level 1:** Approved contractor that has the capability to form partnerships and alliances with NPDC. Able to work unsupervised and manage their own subcontractors.
 - **Level 2:** Contractor can work unsupervised on NPDC sites and manages subcontractors under their approved umbrella.
 - **Level 3:** Contractor can work unsupervised when onsite by NPDC employees but any subcontractors must prequalify separately.
 - **Level 4:** Contractor must be supervised when onsite by NPDC employees and any subcontractors must prequalify separately.
- Internal & external assurance requirements, frequencies and responsibilities
- Multi-level influencing meeting frequency and responsibilities
- Lessons learned & hazard alert requirements
- Requalification review cycle (if different to the standard 2 year review requirement)

Why can't I update some details in my company profile?

Some fields have been locked to 'admin only'. To update these, please contact the Health and Safety Team: phone 06 759 6060 or Email: hseteam@npdc.govt.nz

How long will it take to get approved?

This will depend on the information and evidence supplied for review. Sometimes we need to request further detail or examples of processes or procedures in use. Providing everything up front will speed up the process and approval will generally be completed within ten working days from date of submission of questionnaire/s and documents to submit.

For more FAQ's, visit the NPDC website '[Contractor Information](#)' page.

For further information on this user guide contact the Health and Safety Team. 06 759 6060

Email: hseteam@npdc.govt.nz



Mountain to Sea
Te Kaunihera-ā-Rohe o Ngāmotu
NEW PLYMOUTH DISTRICT COUNCIL
newplymouthnz.com
2nd Best Region in the World to Visit (Lonely Planet 2017)