



## 'HOW TO' GUIDE FOR CONTRACTORS

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

This user guide contains instructions for using the Pinnacle system to complete H&S prequalification and manage your assigned tasks.

**Note:** To become 'H&S prequalified' you will need to complete a supplier pack as part of the prequalification and procurement process. Please ask the person you are supplying services to at the Council for a 'new supplier' pack to complete.

### Quick Links

[Logging in for the First Time](#)

[Assigned Tasks](#)

[Completing Pre-qualification](#)

[Contractor Review Meetings](#)

[Uploading Insurance Documents](#)

[Help & Support](#)

For any questions, please don't hesitate to contact us:

### Health and Safety Team, NPDC

Phone: 06-759-6060

Email: [hswteam@npdc.govt.nz](mailto:hswteam@npdc.govt.nz)

NPDC Website: [Contractor Information](#)

Pinnacle system URL: [https://live.ecoportal.com/o/npdc\\_pinnacle](https://live.ecoportal.com/o/npdc_pinnacle)

## ABOUT THE PINNACLE SYSTEM

### You can:

- **Complete Pre-Qualification**

You'll receive notification from NPDC to login to Pinnacle to complete the prequalification online. Follow the guide on the next page to learn how to do this.

- **Complete Contractor Review Meetings Online**

Once you're engaged for work, we conduct regular contractor review meetings. These are managed online via the Pinnacle system. You'll find instructions in this guide which will help you understand how to use this.

## LOGGING IN FOR THE FIRST TIME

1. You'll receive email notification to advise that you have a task pending to complete. If you're logging in for the first time you'll see the screens below.

**Note:** We recommend you use either a **Chrome** or **Edge** browser

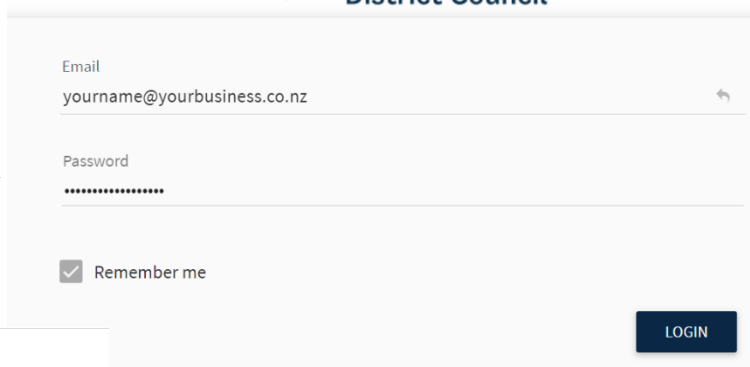
2.



The screenshot shows the New Plymouth District Council login page. At the top is the council's logo and name in both English and Māori. Below is a form with an 'Email' label and a text input field containing 'yourname@yourbusiness.co.nz'. A blue callout bubble points to the input field with the text 'Enter your email address and click 'Next''. At the bottom right of the form is a dark blue button labeled 'NEXT'.

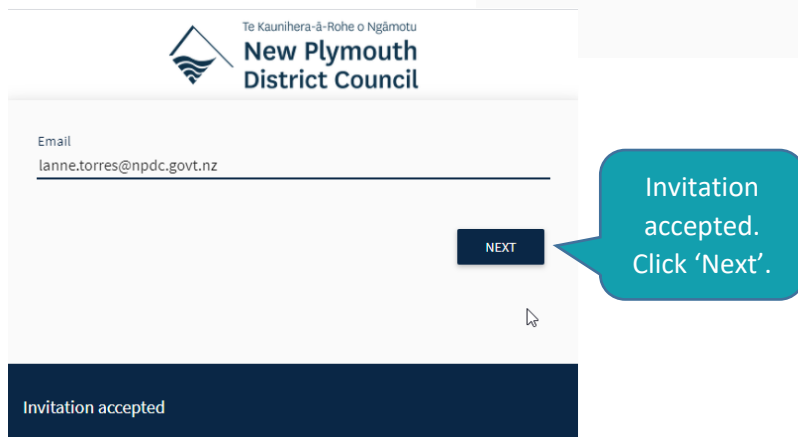
3.

Create a password, tick 'Remember me' then click 'Login'.



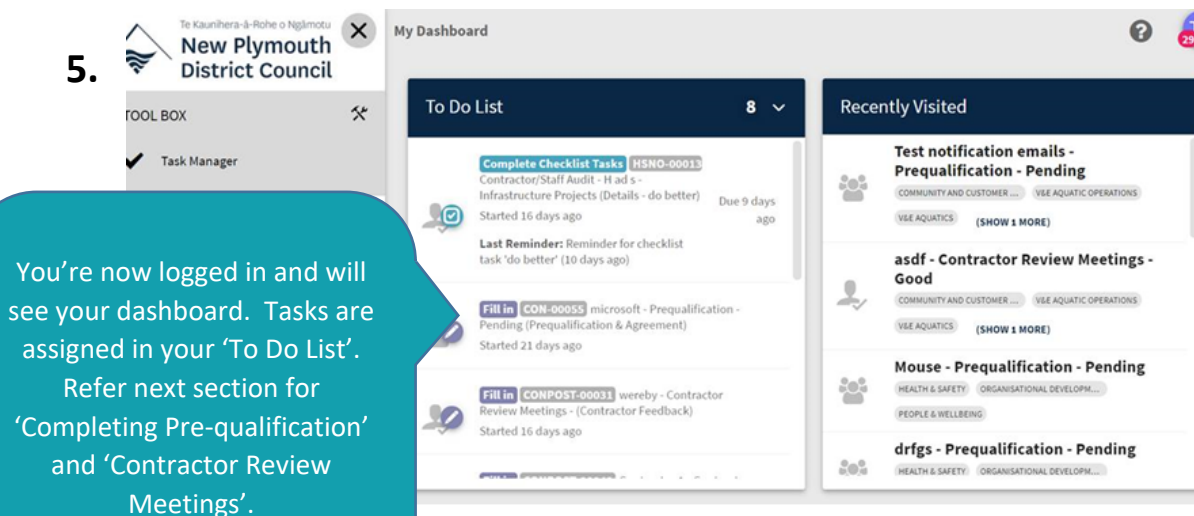
The screenshot shows the password creation step of the login process. It features the same council logo and name at the top. The form has two input fields: 'Email' (containing 'yourname@yourbusiness.co.nz') and 'Password' (with masked characters). Below the password field is a checkbox labeled 'Remember me' which is checked. A dark blue button labeled 'LOGIN' is at the bottom right.

4.



The screenshot shows the invitation acceptance screen. It has the council logo and name at the top. The form has an 'Email' label and a text input field containing 'lanne.torres@npdc.govt.nz'. A dark blue button labeled 'NEXT' is at the bottom right. A blue callout bubble points to the 'NEXT' button with the text 'Invitation accepted. Click 'Next''. Below the form, a dark blue banner displays the text 'Invitation accepted'.

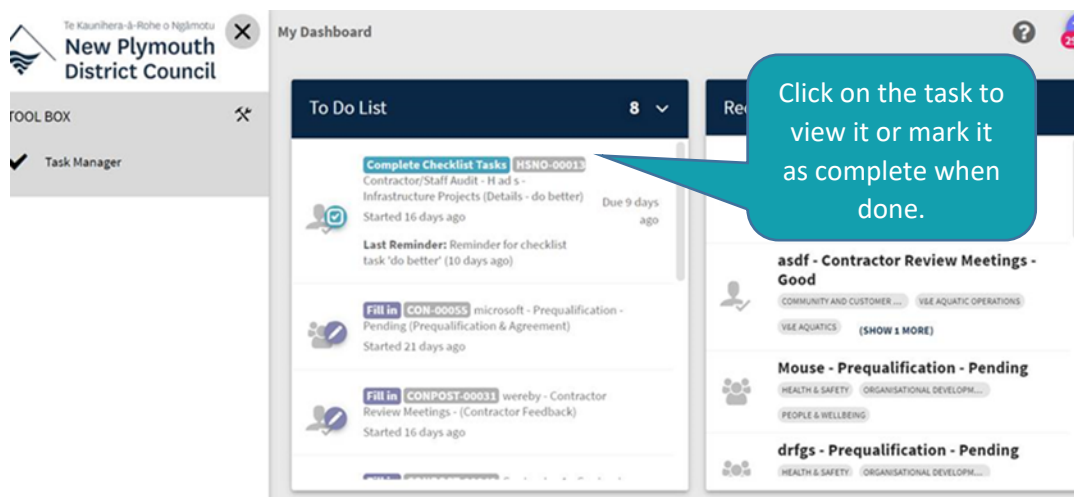
5.



The screenshot shows the user's dashboard after logging in. On the left is a 'TOOL BOX' with a 'Task Manager' icon. The main area is titled 'My Dashboard' and contains a 'To Do List' with three tasks: 'Complete Checklist Tasks', 'Last Reminder: Reminder for checklist task', and 'Fill in CON-00055'. On the right is a 'Recently Visited' section with three items: 'Test notification emails - Prequalification - Pending', 'asdf - Contractor Review Meetings - Good', and 'Mouse - Prequalification - Pending'. A large blue callout bubble at the bottom left contains the text: 'You're now logged in and will see your dashboard. Tasks are assigned in your 'To Do List'. Refer next section for 'Completing Pre-qualification' and 'Contractor Review Meetings'.'

## ASSIGNED TASKS

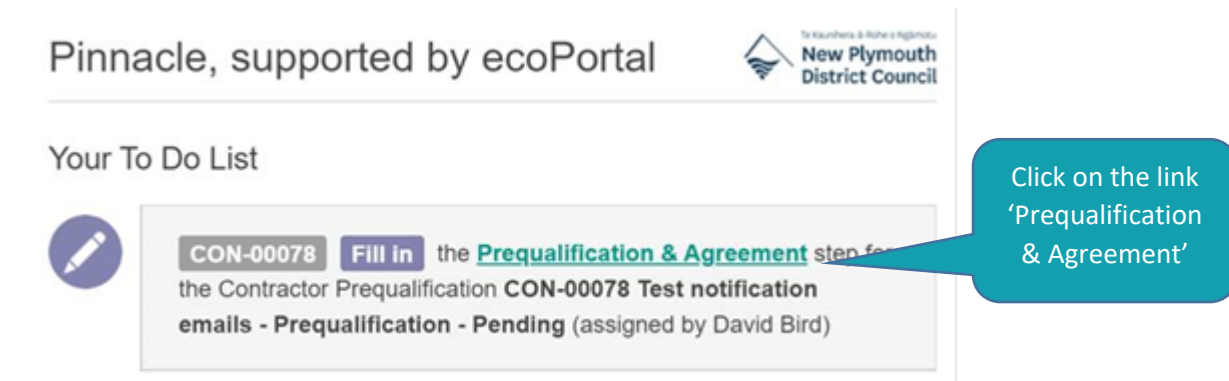
During the contractor review process, NPDC may create a task for the contractor to complete. You'll receive a notification email with a link to access this, and the task will show on your dashboard as below:



Once the task is complete, it will no longer show on your dashboard.

## COMPLETING PRE-QUALIFICATION

1. You'll receive an email which includes the following message to login to complete pre-qualification. **Note:** We recommend you use either a **Chrome** or **Edge** browser.



2. If this is the first time logging in, please see directions in the previous section. If this is not the first time, the 'Prequalification & Agreement' link will take you directly to this form:

Te Kaunihara ā-Rohi o Ngāmotu  
New Plymouth District Council

TOOL BOX  
✓ Task Manager

Test notification emails - Prequalification - Pending

NPDC Pinnacle Health, Safety & Environment

Test notification emails - Prequalification - Pending  
UID#: CON-00078 Created Sep 16, 2021 Updated Sep 16, 2021 No upcoming events

1 Contractor Details 2 Prequalification & Agreement 3 Sign-Off Decision

New Plymouth District Council is committed to providing a healthy and safe working environment. We are committed to doing all we can to ensure our contractors and subcontractors are safe and healthy whilst undertaking work on our behalf.

Fill In ASSIGN TO SAVE PROGRESS SAVE & SUBMIT

3. Follow the prompts and complete the sections. Sections with a red bar indicate they're mandatory sections to complete.

Test notification emails - Prequalification - Pending

above conditions, and both my workers and I will comply with all health and safety standards as required.

Contractor representative:  
Joe Blogs

Position:  
H&S manager

Contractor acknowledgement:  
Joe  
Signed/witnessed by Test Contractor on 17/09/2021, 02:27pm

SIGN AGAIN CLEAR

Fill In ASSIGN TO SAVE PROGRESS SAVE & SUBMIT

Once you've completed the sections, the 'Save and Submit' icon has turned blue. You can now click this to submit the application.

4. Upon submitting, NPDC will review the information. If any further information is required, NPDC will reject the application which will send it back to the contractor to revise and resubmit with further detail or documentation. You'll receive an email that looks like this:

Pinnacle, supported by ecoPortal

Te Kaunihara ā-Rohi o Ngāmotu  
New Plymouth District Council

Your To Do List

CON-00078 Revise the Prequalification & Agreement step for the Contractor Prequalification CON-00078 Test notification emails - Prequalification - Pending

Reviewer message: "see comment"

Click the link to login to Pinnacle to revise your application.

5. If NPDC make changes or add comments to your application you'll receive notifications, which may look like the following. Click the link to view the comment.

Pinnacle, supported by ecoPortal



### New Comment



David Bird commented on [Test notification emails - Prequalification - Pending](#)

(You are assigned)

+[occiebird@gmail.com](mailto:occiebird@gmail.com) Please upload new insurance

You've been assigned a comment within a particular page.

6. When the final 'sign off' decision is made, you'll receive an 'Approved' email.

Pinnacle, supported by ecoPortal



### New Activity



David Bird updated [CON-00078 Test notification emails - Prequalification - Approved](#)

Sign-Off Decision on CON-00078 Test notification emails - Prequalification Approved has completed.

Congratulations!

## CONTRACTOR REVIEW MEETINGS

1. You'll receive an email which includes a message to login to complete the Contractor Review.  
**Note:** We recommend you use either a **Chrome** or **Edge** browser.
2. If this is the first time logging in, please see directions on page 2. If this is not the first time, the 'Contractor Feedback' link will take you directly to this form to complete.


This screenshot shows the 'test - Contractor Review Meetings' form at the NPDC. The form is titled 'test - Contractor Review Meetings' and includes a red icon in the top left corner. A callout box points to the top right corner, stating: 'Click this tile to take you to the dashboard.' The form has a progress bar with three steps: 1. Details, 2. Contractor Feedback (current step), and 3. Summary & Sign Off. The 'Contractor Feedback' section is highlighted with a red border. A callout box points to the 'Contractor representative:' field, stating: 'All red sections are mandatory fields.' The form includes a 'TOOL BOX' on the left with a 'Task Manager' link. The bottom of the form has buttons for 'Fill In', 'ASSIGN TO', 'SAVE PROGRESS', and 'SAVE & SUBMIT'.

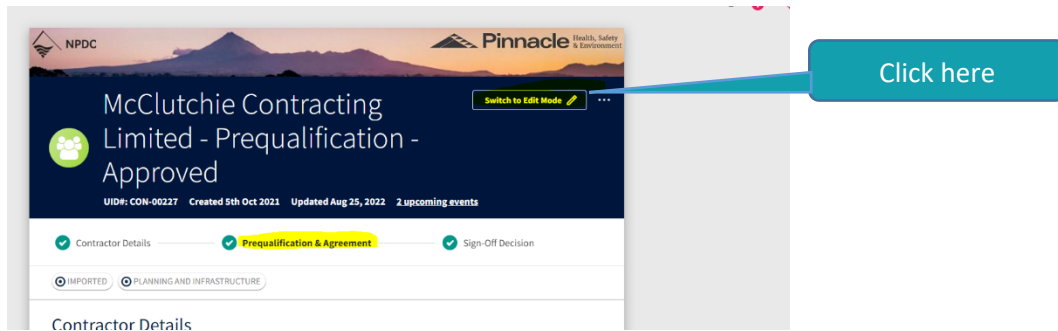
3. Complete the section of the form and submit to NPDC. **Note:** You may need to share login details with the staff member who needs to complete this on your behalf.

This screenshot shows the 'test - Contractor Review Meetings' form at the NPDC, specifically the 'Contractor's Specific Feedback' section. The form is titled 'test - Contractor Review Meetings -' and includes a red icon in the top left corner. A callout box points to the 'Task Manager' link in the 'TOOL BOX' on the left, stating: 'Click here to view all tasks and reviews, current or previous.' The 'Contractor's Specific Feedback' section is highlighted with a red border. A callout box points to the 'SAVE PROGRESS' button at the bottom, stating: 'Save Progress allows you to save and come back to it later to complete.' The form includes a progress bar with three steps: 1. Details, 2. Contractor Feedback, and 3. Summary & Sign Off. The 'Contractor's Specific Feedback' section is highlighted with a red border. A callout box points to the 'SAVE & SUBMIT' button at the bottom right, stating: 'When all sections are filled out you can Save and Submit'. The form includes a 'TOOL BOX' on the left with a 'Task Manager' link. The bottom of the form has buttons for 'EXCELLENT', 'GOOD', 'SATISFACTORY', 'UNSATISFACTORY', 'POOR', 'N/A', 'SAVE PROGRESS', and 'SAVE & SUBMIT'.

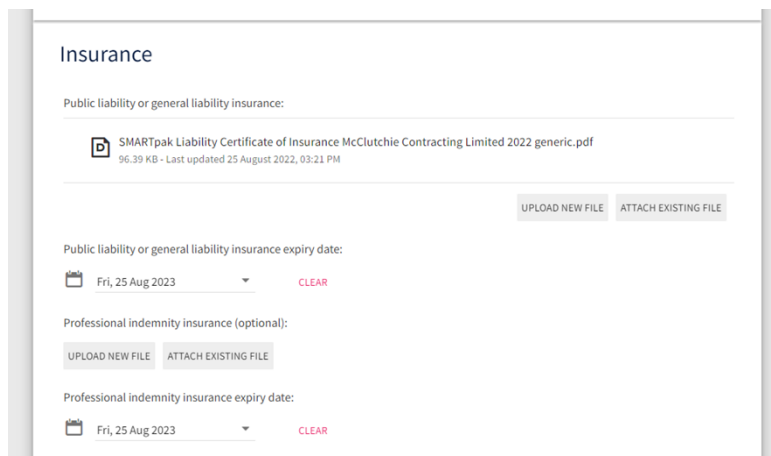
4. Once you've submitted your feedback, NPDC and your representative will meet to review, assign any corrective actions and sign it off. You'll receive email notification to confirm that the review has been signed off.

## UPLOADING INSURANCE DOCUMENTS

1. Log into [Pinnacle](#)
2. Click on  **Prequalification & Agreement**
3. Switch to Edit Mode (top right corner)

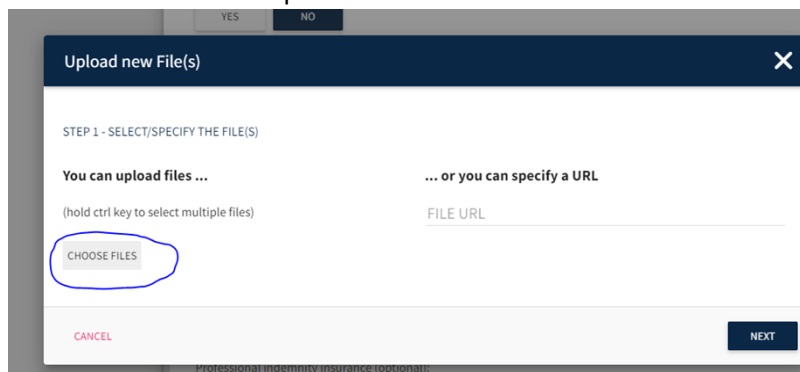


4. Scroll down to Insurance Section

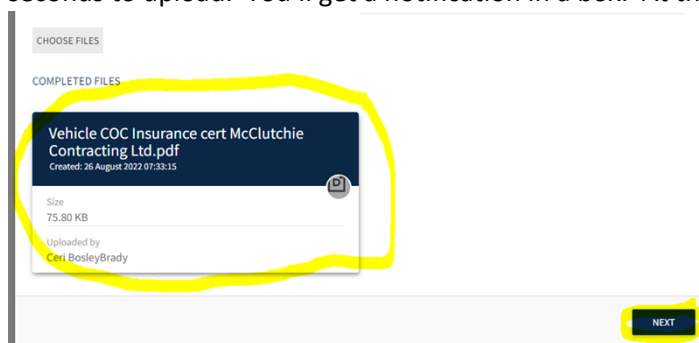


The screenshot shows the "Insurance" section of the Pinnacle web interface. It contains two main sections: "Public liability or general liability insurance:" and "Professional indemnity insurance (optional):". Each section has a file upload area with a "SMARTpak Liability Certificate of Insurance McClutchie Contracting Limited 2022 generic.pdf" file listed. Below the file upload area, there is a date picker for the "Public liability or general liability insurance expiry date:" and a "CLEAR" button. The "Professional indemnity insurance expiry date:" section also has a date picker and a "CLEAR" button.

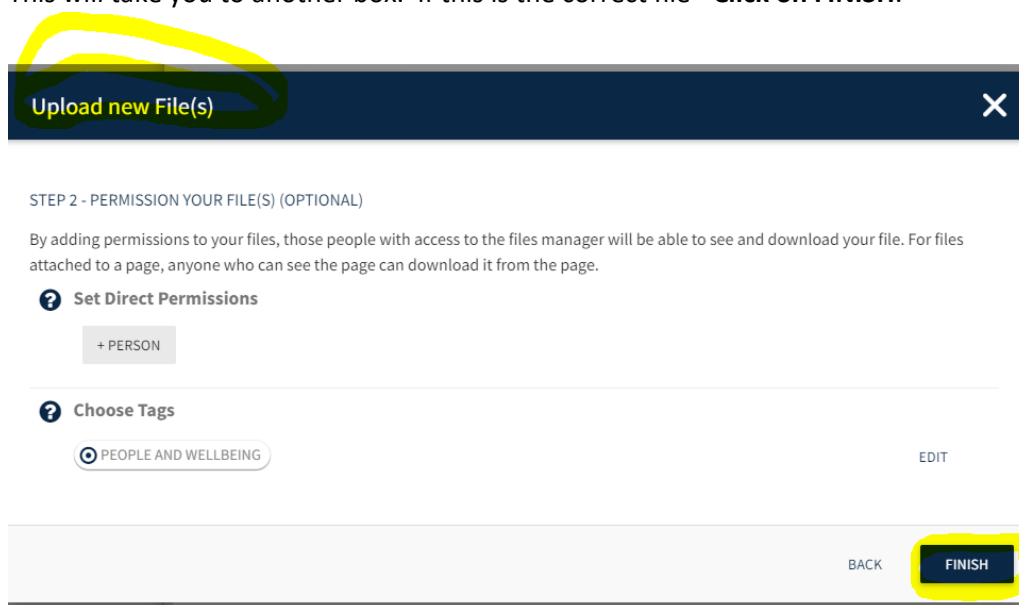
5. Select 'choose file' to upload new insurance certificate



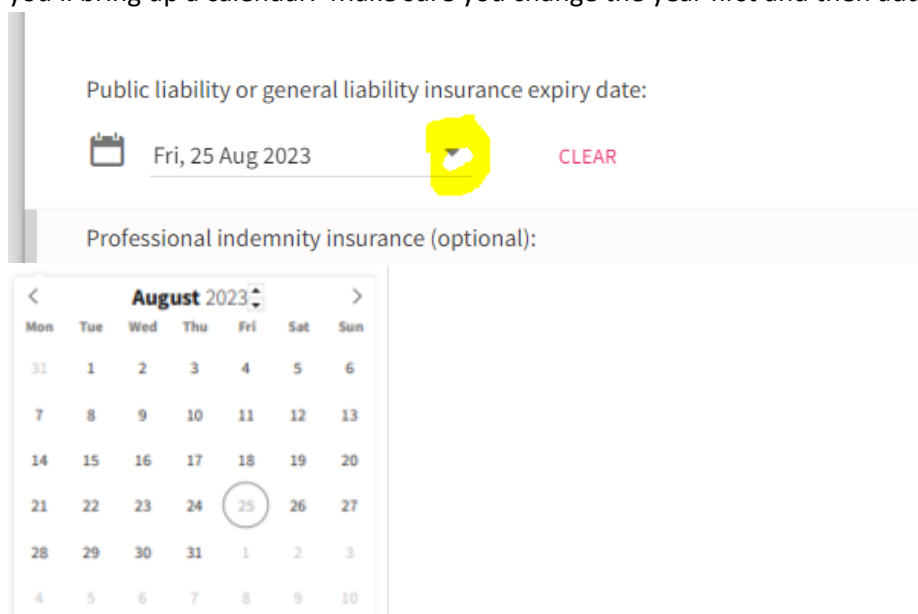
6. Choose the File from your computer and then **click Open**. **Note:** The file may take a few seconds to upload. You'll get a notification in a box. At this point **Click on NEXT**



7. This will take you to another box. If this is the correct file - **Click on FINISH**.

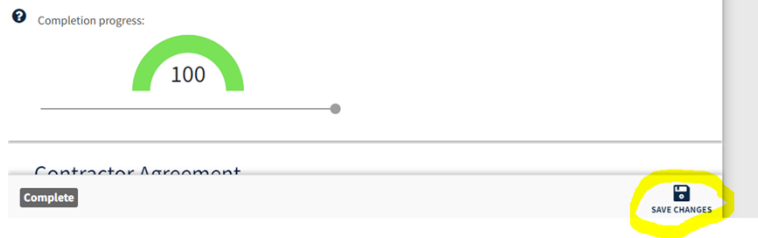


8. You will need to also update the expiry date of the insurance. By Clicking on the dropdown you'll bring up a calendar. Make sure you change the year first and then add the date.





## 9. Save changes – bottom right of the page



## HELP AND SUPPORT

For help on using the system or technical issues, please contact the HSW team

### Health and Safety Team, NPDC

**Phone:** 06-759-6060

**Email:** [hswteam@npdc.govt.nz](mailto:hswteam@npdc.govt.nz)