



'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

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[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

NPDC Website: [Contractor Information](#)
Pinnacle system URL: 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**

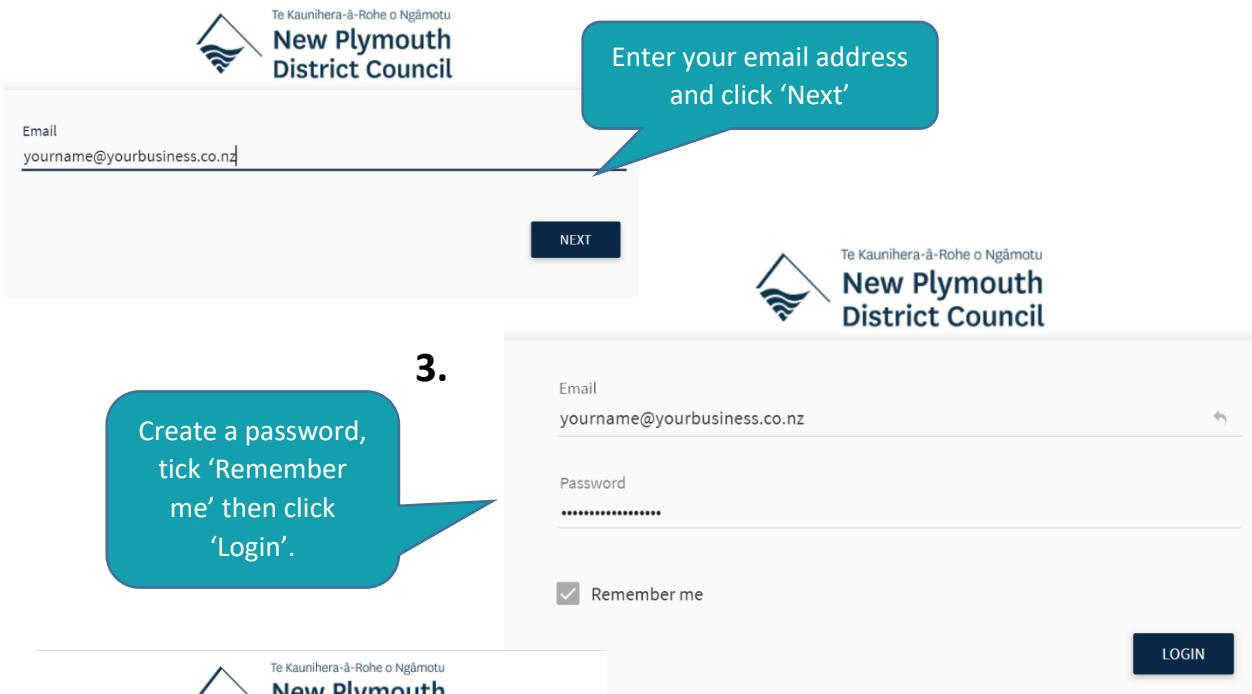
Once you're engaged for work, we conduct regular contractor review meetings. These are managed online via the Pinnacle system. You'll find instructions in this guide which will help you understand how to use this.

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.



Te Kaunihera-ā-Rohe o Ngāmotu
New Plymouth District Council

Email
yourname@yourbusiness.co.nz

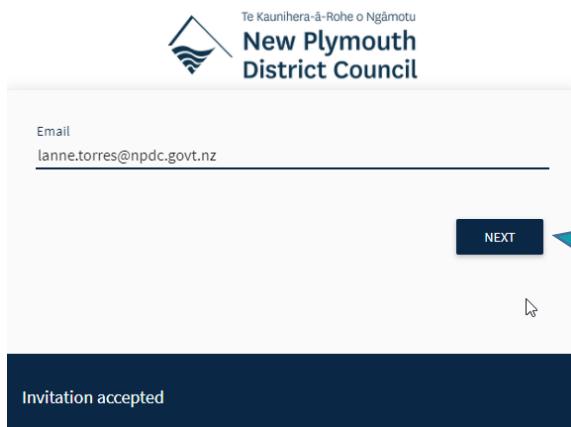
NEXT

Te Kaunihera-ā-Rohe o Ngāmotu
New Plymouth District Council

3.

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

4.



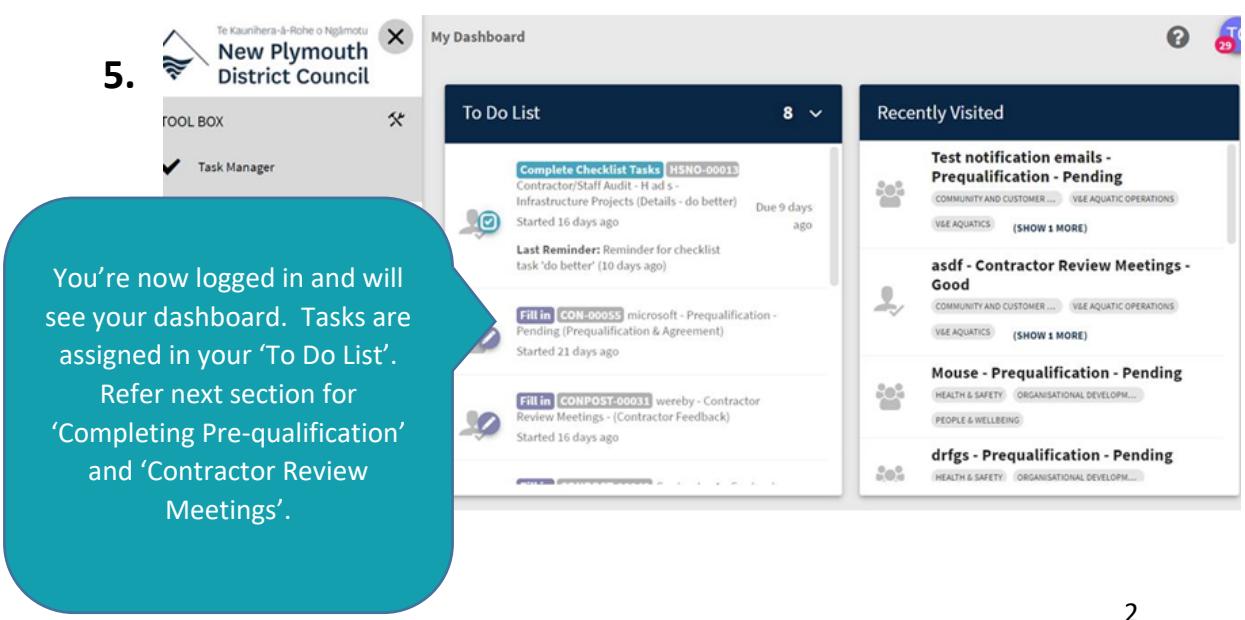
Te Kaunihera-ā-Rohe o Ngāmotu
New Plymouth District Council

Email
lanne.torres@npdc.govt.nz

NEXT

Invitation
accepted.
Click 'Next'.

5.



Te Kaunihera-ā-Rohe o Ngāmotu
New Plymouth District Council

TOOL BOX

Task Manager

My Dashboard

To Do List 8

Complete Checklist Tasks HSNO-00013
Contractor/Staff Audit - H ad s - Infrastructure Projects (Details - do better)
Started 16 days ago Due 9 days ago

Last Reminder: Reminder for checklist task 'do better' (10 days ago)

Fill in CON-00055 microsoft - Prequalification - Pending (Prequalification & Agreement)
Started 21 days ago

Fill in CONPOST-00031 wereby - Contractor Review Meetings - (Contractor Feedback)
Started 16 days ago

Recently Visited

Test notification emails - Prequalification - Pending
COMMUNITY AND CUSTOMER... VIE AQUATIC OPERATIONS
VIE AQUATICS (SHOW 1 MORE)

asdf - Contractor Review Meetings - Good
COMMUNITY AND CUSTOMER... VIE AQUATIC OPERATIONS
VIE AQUATICS (SHOW 1 MORE)

Mouse - Prequalification - Pending
HEALTH & SAFETY ORGANISATIONAL DEVELOPM...
PEOPLE & WELLBEING

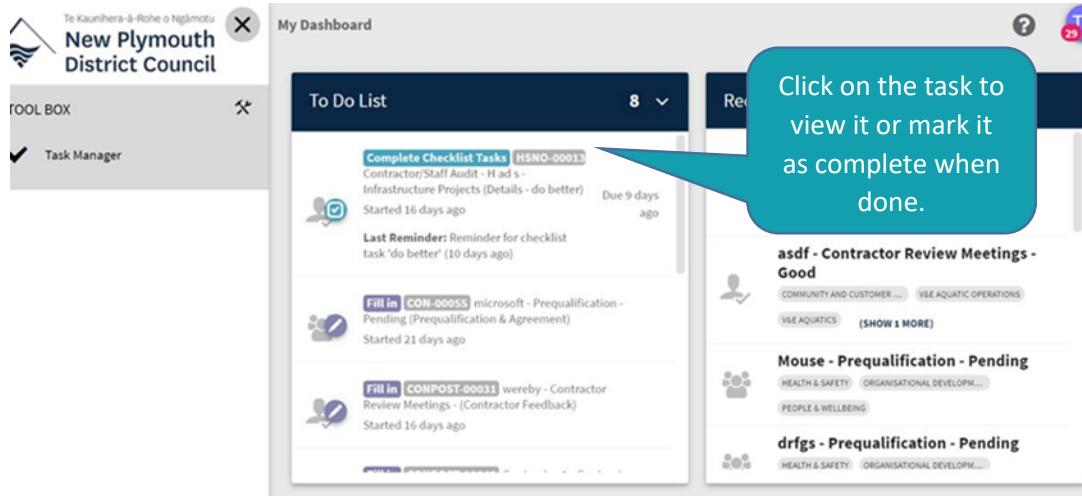
drfgs - Prequalification - Pending
HEALTH & SAFETY ORGANISATIONAL DEVELOPM...

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:



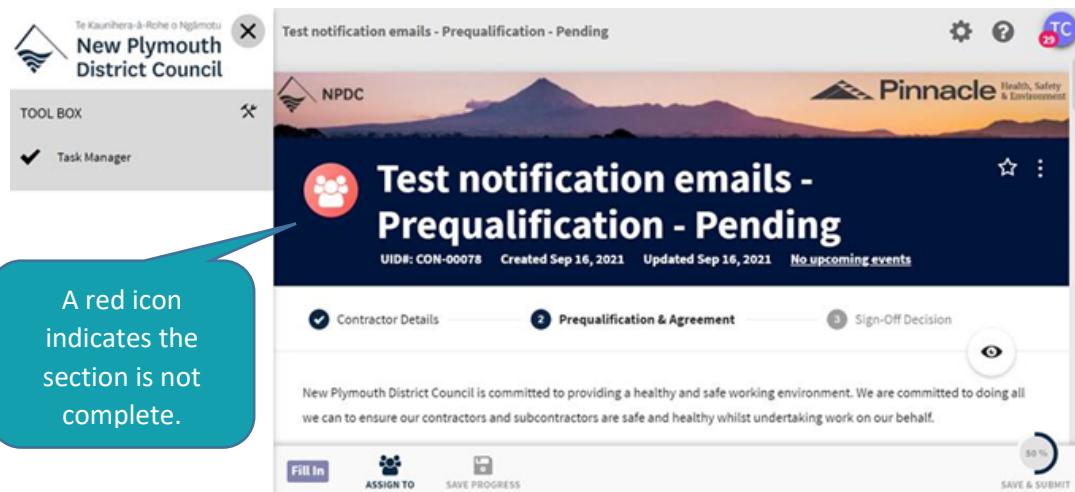
Once the task is complete, it will no longer show on your dashboard.

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:



A red icon indicates the section is not complete.

Test notification emails - Prequalification - Pending

UID# CON-00078 Created Sep 16, 2021 Updated Sep 16, 2021 No upcoming events

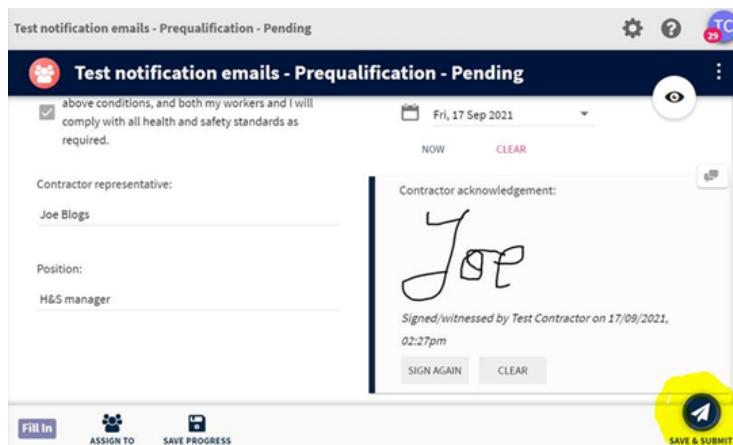
1 Contractor Details 2 Prequalification & Agreement 3 Sign-Off Decision

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

80% 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: 
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 Kaunihera o Rōhe o Ngāi Tahu
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 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.

Click this tile to take you to the dashboard.

A red icon indicates the section is not complete.

All red sections are mandatory fields.

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.

Click here to view all tasks and reviews, current or previous.

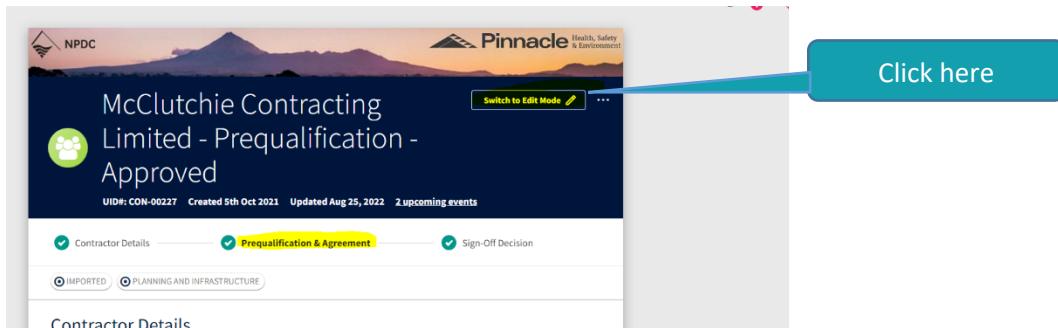
'Save Progress' allows you to save and come back to it later to complete.

When all sections are filled out you can 'Save and Submit'.

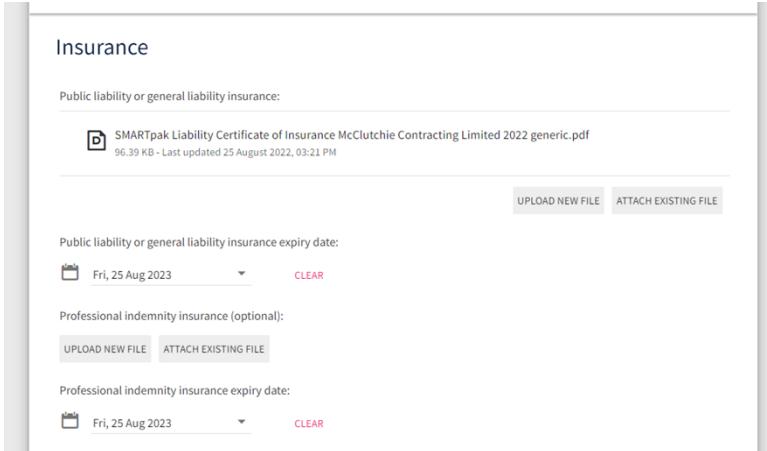
4. Once you've submitted your feedback, NPDC and your representative will meet to review, assign any corrective actions and sign it off. You'll receive email notification to confirm that the review has been signed off.

UPLOADING INSURANCE DOCUMENTS

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

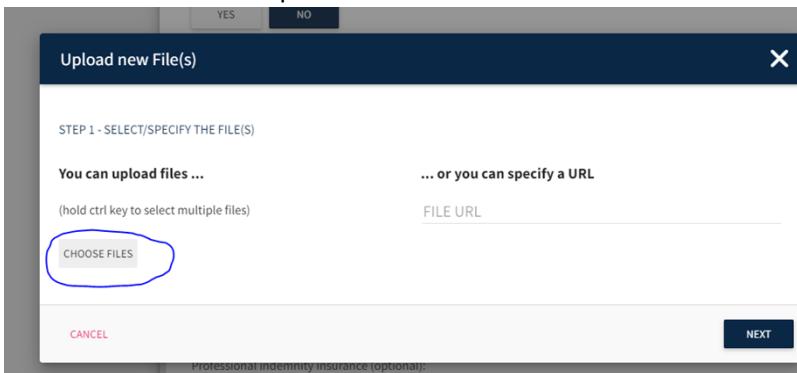


4. Scroll down to Insurance Section

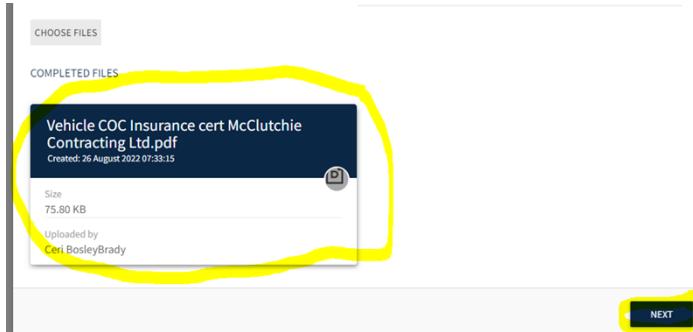


The screenshot shows the 'Insurance' section of the Pinnacle software. It includes fields for 'Public liability or general liability insurance' (with a file attachment shown), 'Professional indemnity insurance (optional)', and 'Professional indemnity insurance expiry date' (set to 'Fri, 25 Aug 2023'). There are 'UPLOAD NEW FILE' and 'ATTACH EXISTING FILE' buttons for each section.

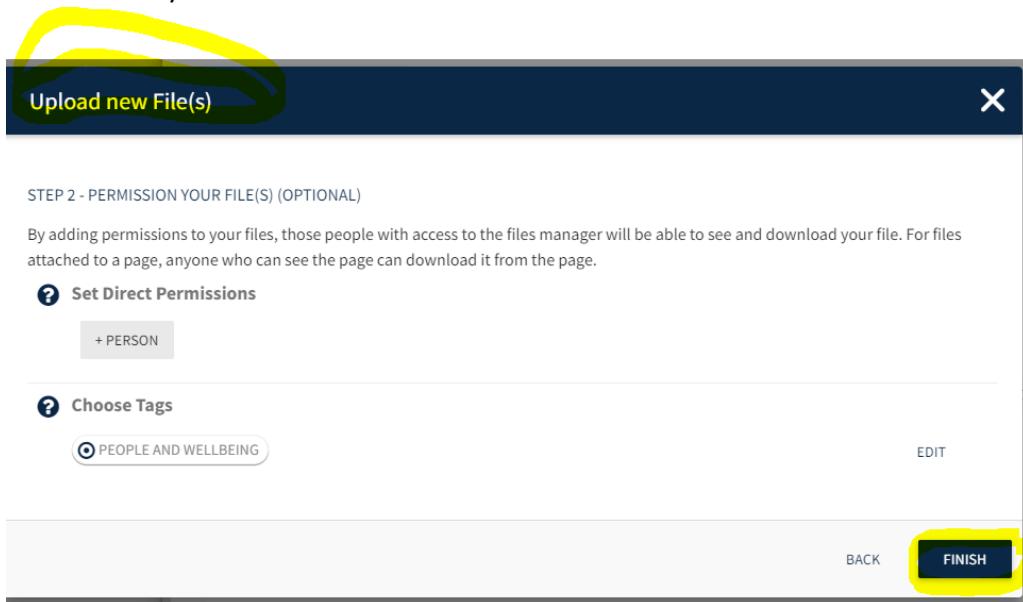
5. Select 'choose file' to upload new insurance certificate



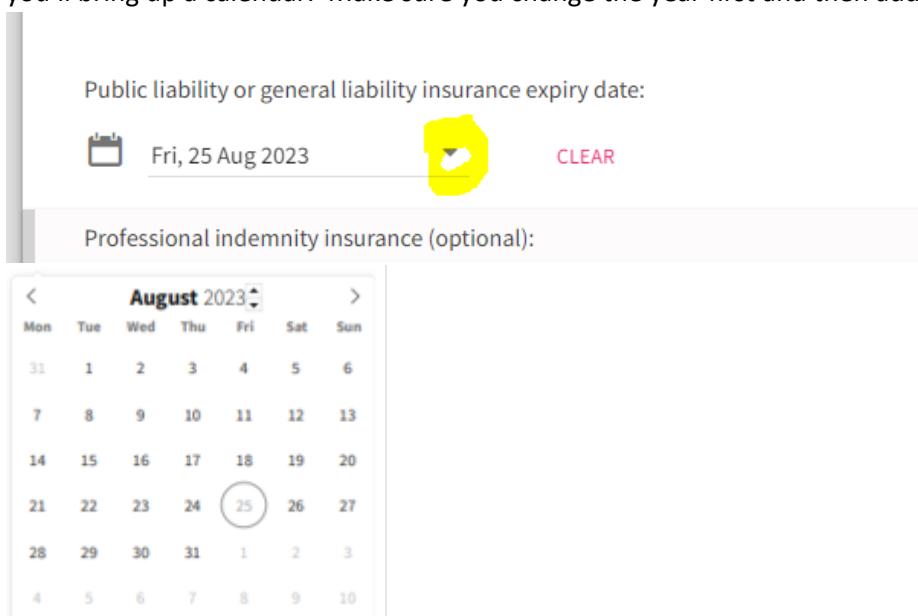
6. Choose the File from your computer and then **click Open**. **Note:** The file may take a few seconds to upload. You'll get a notification in a box. At this point **Click on NEXT**



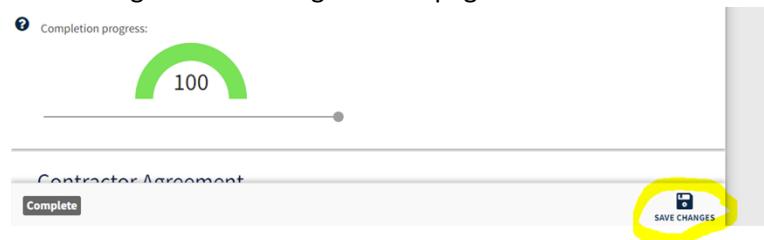
7. This will take you to another box. If this is the correct file - **Click on FINISH**.



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