



'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 must have an active supplier account, 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

NPDC Website: [Contractor Information](#)

Pinnacle system URL: https://live.ecoportals.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

Enter your email address and click 'Next'

3.

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

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

Email
yourname@yourbusiness.co.nz

Password
.....

Remember me

LOGIN

4.

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

Email
lanne.torres@npdc.govt.nz

NEXT

Invitation accepted. Click 'Next'.

Invitation accepted

5.

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

My Dashboard

TOOL BOX
Task Manager

To Do List 8

Recently Visited

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

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

Fill in CON-0055 microsoft - Prequalification - Pending (Prequalification & Agreement) Started 21 days ago

Fill in CONPOST-0003 wereby - Contractor Review Meetings - (Contractor Feedback) Started 16 days ago

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

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

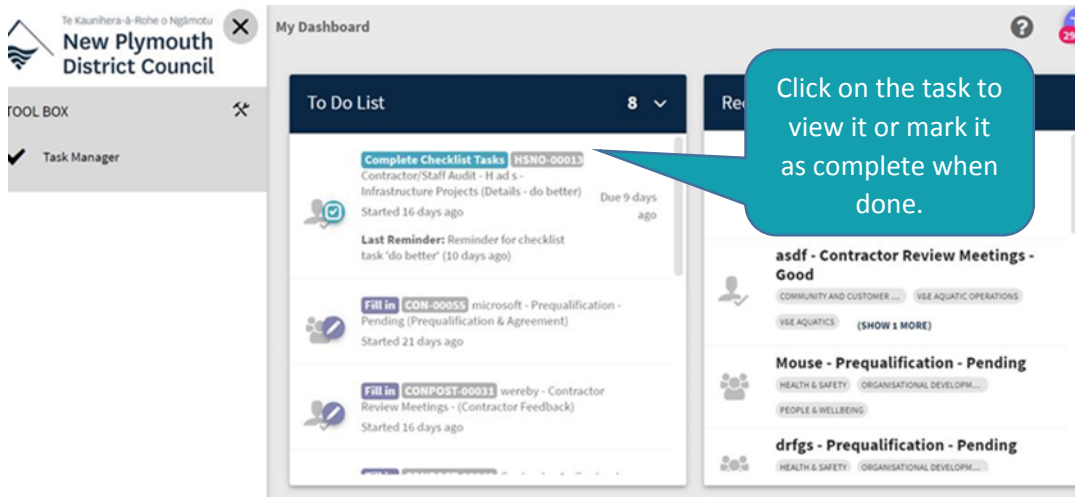
Mouse - Prequalification - Pending
HEALTH & SAFETY ORGANISATIONAL DEVELOPH...
PEOPLE & WELLBEING

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

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

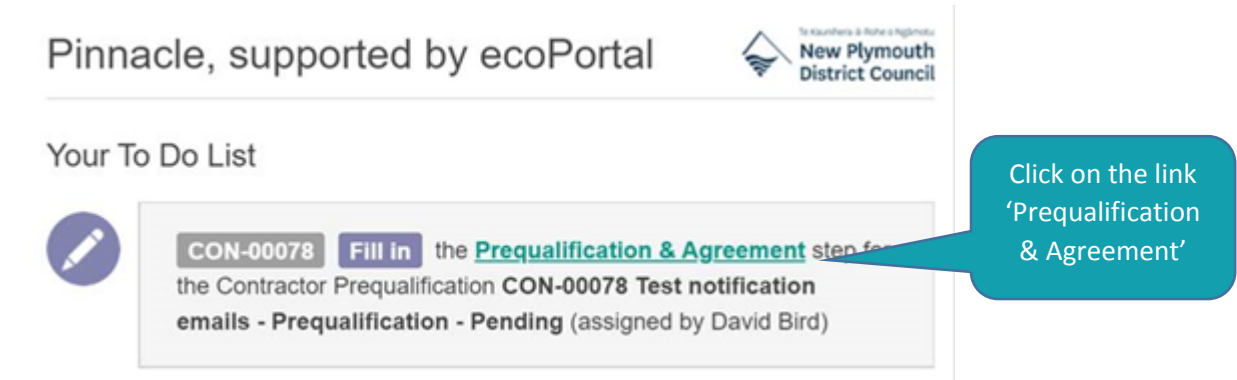
During the contractor review process, NPDC may create a task for the contractor to complete. You'll receive a notification email with a link to access this, and the task will show on your dashboard as below:



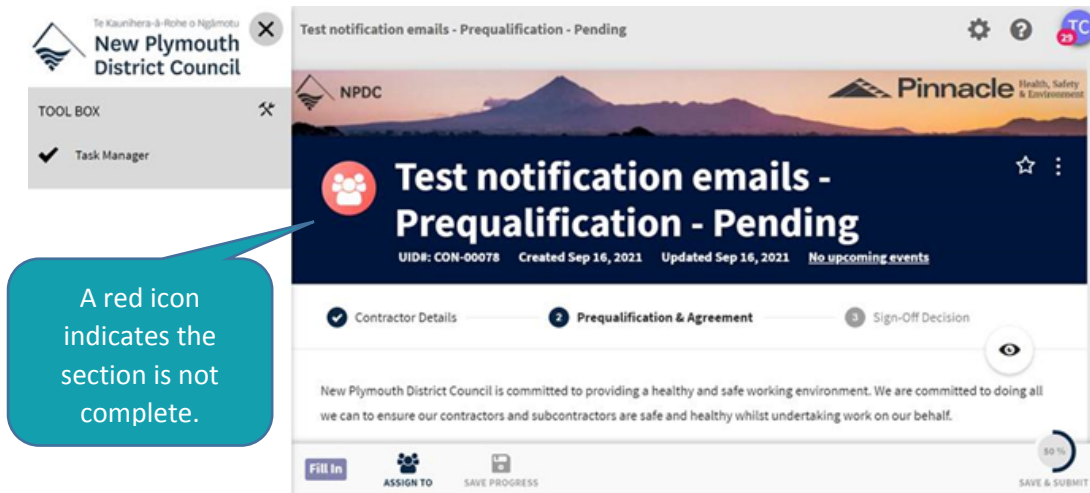
Once the task is complete, it will no longer show on your dashboard.

COMPLETING PRE-QUALIFICATION

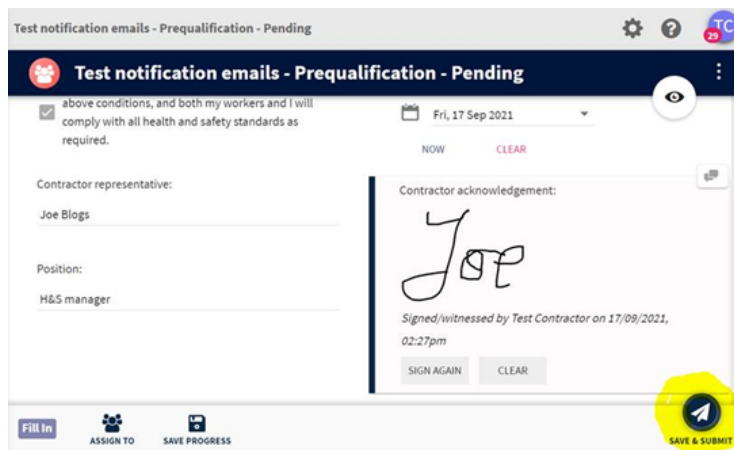
1. You'll receive an email which includes the following message to login to complete pre-qualification. **Note:** We recommend you use either a **Chrome** or **Edge** browser.



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:



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



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:



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.


The screenshot shows the 'test - Contractor Review Meetings' dashboard. A callout points to a blue tile with the text 'Click this tile to take you to the dashboard.' Another callout points to a red icon in the top left corner with the text 'A red icon indicates the section is not complete.' A third callout points to red bars on the form fields with the text 'All red sections are mandatory fields.' The dashboard includes a 'TOOL BOX' with 'Task Manager', a progress bar with steps 'Details', 'Contractor Feedback', and 'Summary & Sign Off', and a 'Contractor Feedback' section with a 'Contractor representative:' field. At the bottom, there are buttons for 'Fill In', 'ASSIGN TO', 'SAVE PROGRESS', and 'SAVE & SUBMIT'.

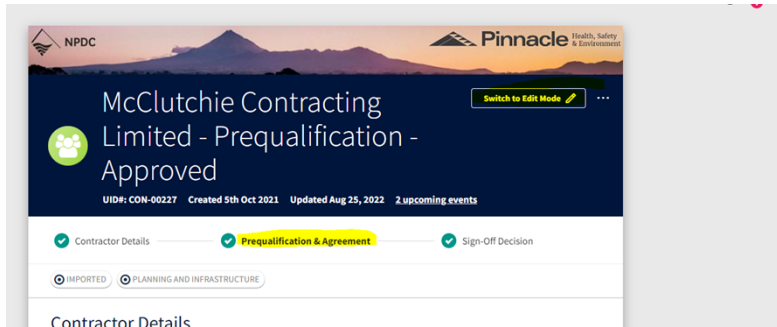
3. Complete the section of the form and submit to NPDC. **Note:** You may need to share login details with the staff member who needs to complete this on your behalf.

The screenshot shows the 'Contractor's Specific Feedback' form. A callout points to the 'Task Manager' link in the 'TOOL BOX' with the text 'Click here to view all tasks and reviews, current or previous.' Another callout points to the 'SAVE PROGRESS' button with the text 'Save Progress allows you to save and come back to it later to complete.' A third callout points to the 'SAVE & SUBMIT' button with the text 'When all sections are filled out you can Save and Submit'. The form includes a rating scale (EXCELLENT, GOOD, SATISFACTORY, UNSATISFACTORY, POOR, N/A) and a list of questions: 'What happened the way you thought it would happen?', 'What surprised you?', 'What hazards did we identify and what hazards did we miss?', and 'Where did you have to make do, improvise or adapt?'. There is also a text area for 'Please, feel free to specify any relevant issues, concerns or positive... provide:'.

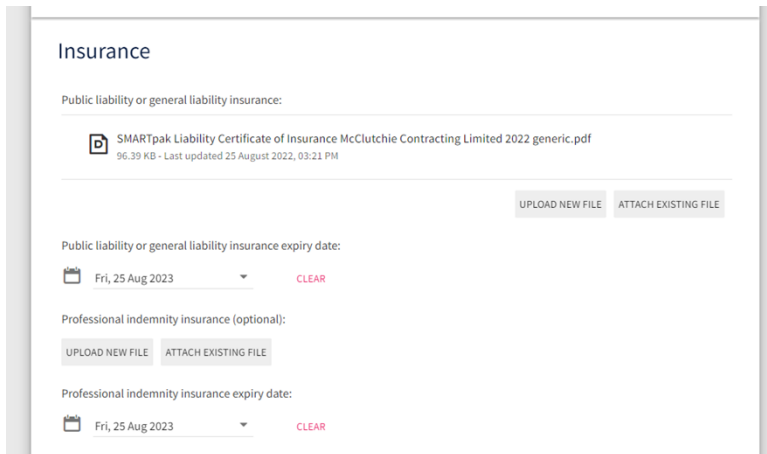
4. Once you've submitted your feedback, NPDC and your representative will meet to review, assign any corrective actions and sign it off. You'll receive email notification to confirm that the review has been signed off.

UPLOADING INSURANCE DOCUMENTS

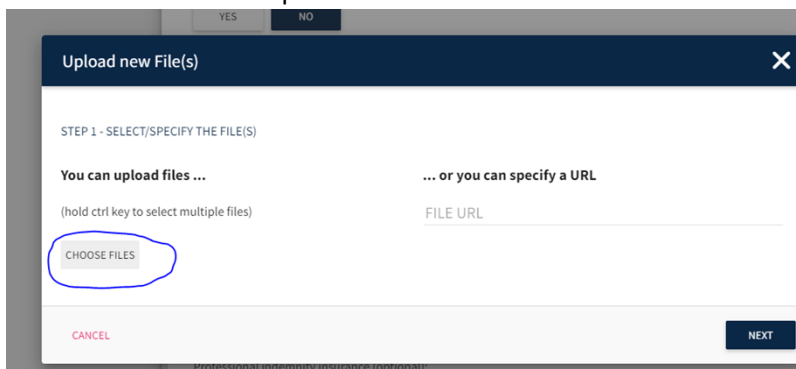
1. Log into [Pinnacle](#)
2. Click on  **Prequalification & Agreement**
3. Switch to Edit Mode (top right corner)



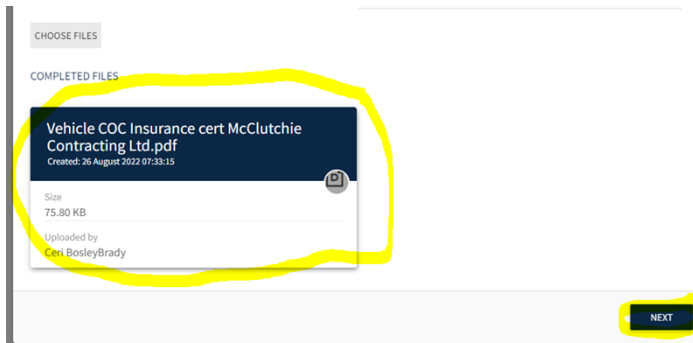
4. Scroll down to Insurance Section



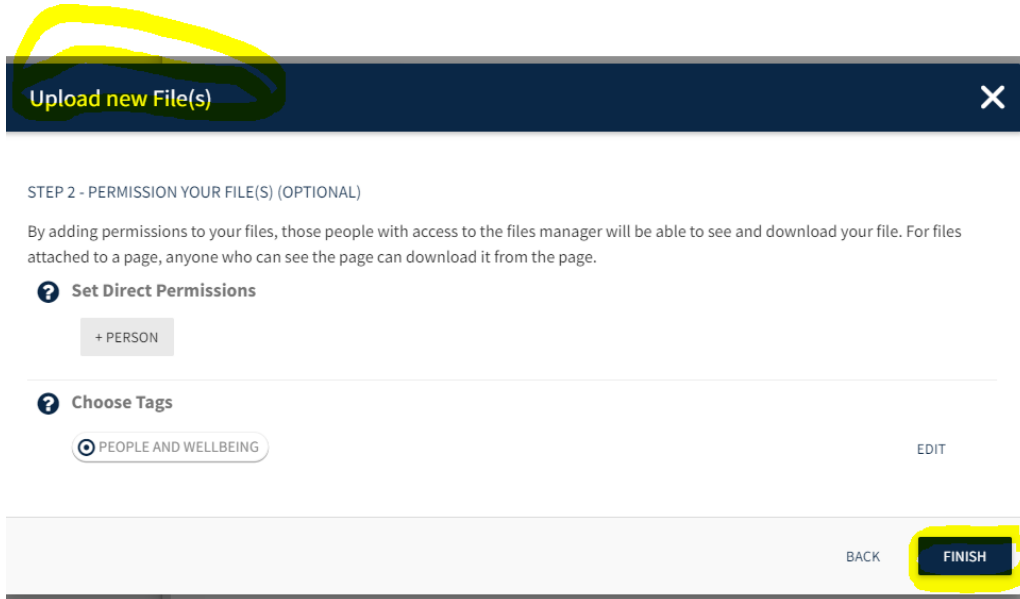
5. Select 'choose file' to upload new insurance certificate



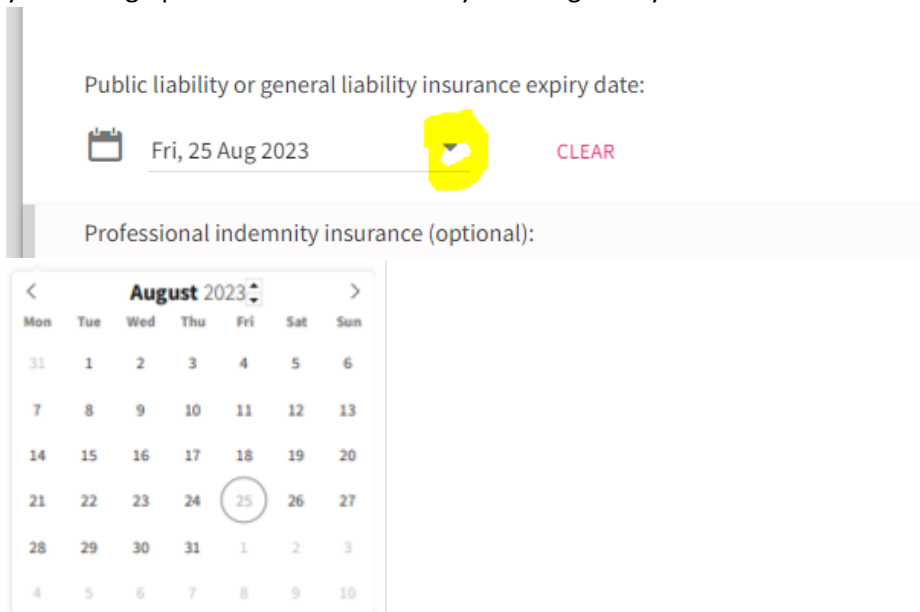
6. Choose the File from your computer and then **click Open**. **Note:** The file may take a few seconds to upload. You'll get a notification in a box. At this point **Click on NEXT**



7. This will take you to another box. If you are happy that this is the file you want - Click on **FINISH**.

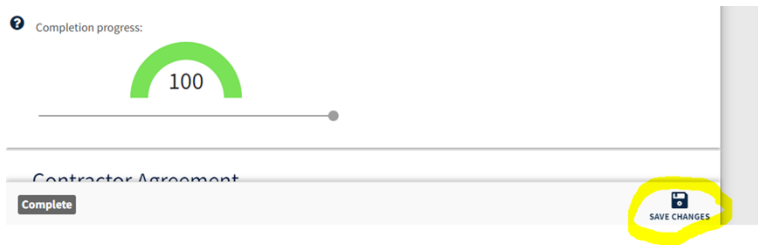


8. You will need to also update the expiry date of the insurance. By Clicking on the dropdown you'll bring up a calendar. Make sure you change the year first and then add the date.



9. Save changes – bottom right of the page

Last Update: September 2022



HELP AND SUPPORT

For help on using the system or technical issues, please contact the HSE team. Contact details and references to links are found on page 1 of this document.