
ComplyWorks Subscription User Guide



October 6, 2011

Contents

| | |
|--|----|
| 1. Register | 3 |
| 2. Get compliant | 3 |
| a) Pay for your account..... | 3 |
| b) Collect the documents you'll need | 4 |
| c) Enter your information | 4 |
| d) Publish your information | 7 |
| e) Upload documents | 7 |
| 3. Market your company to employers | 7 |
| a) Decide which employing companies can see your profile | 7 |
| b) Let employers search for you by service and area | 8 |
| c) Use the ComplyWorks "Ready to Work" logo | 9 |
| d) Display the "Ready to work" certificate | 9 |
| 4. Send your information to a non-ComplyWorks employer | 9 |
| 5. Maintain your profile..... | 10 |
| 6. Take a free training webinar | 10 |
| 7. Contact us if you need help | 11 |

1. Register

- Step 1.** Open your web browser (e.g. Internet Explorer, Mozilla Firefox, Safari, Google Chrome, etc.).
- Step 2.** Go to www.complyworks.com and click **New Member Sign Up**.
- Step 3.** Select **Business** under “Account Type” and enter your activation code.
- Step 4.** Complete the New Account Subscription box by entering your email address and your desired password, along with the security number that’s displayed.
- Step 5.** Click **Next**.
- Step 6.** Enter the contact information of your company’s ComplyWorks administrator.
- Step 7.** Click **Next**.
- Step 8.** Select the “Peak Number of Employees per Year” that reflects the size of your organization.
- Step 9.** Click **Next**.
- Step 10.** Read the member agreement and select “Accept Member Agreement”.
- Step 11.** Select the appropriate “Membership Option”.
- Step 12.** ComplyWorks will now guide you through the uploading of your required data into the system.

2. Get compliant

To show employing companies that you’re compliant with their requirements, you will need to work through the following steps in order:

- a) Pay for your account.
- b) Collect the documents you’ll need.
- c) Enter your information.
- d) Publish your information.
- e) Upload required documents.

a) Pay for your account

If your account has been pre-registered (created by an employing company) or suspended (your membership was not paid on time), you must pay for it in order to continue. The membership type must reflect your peak number of employees during the previous working year. If you do not have a log-in or password, now is the time to call or email us for assistance:

- Phone—(403) 219-4792
- Email—support@complyworks.com



b) Collect the documents you'll need

To get your account compliant, you'll need to provide us with specific information. Before getting started, gather up the following documents (these are the documents typically required by employing companies; the documents you'll need may be different depending on your employing companies' requirements):

- **Insurance**—Depending on the services you provide this may include some or all of the following:
 - Commercial general liability
 - Umbrella liability
 - Auto
 - Aircraft
 - Forest fire
- **Certificate of incorporation**
- **Workers' compensation**—A clearance letter or letter of good standing (the name of the document varies from region to region) as well as an employer premium rate statement.
- **Safety program certificate**—Depending on your region, this can be a Certificate of Recognition (COR), Small Employer Certificate of Recognition (SECOR), or other safety program certificate.

c) Enter your information

The main headings (at the top of the page) that you'll be using are "Personal" (to adjust your password), "Company" (for administration of your account) and "Works" (for courses and online training).

Company

Under this heading you will see the following sections in the order in which they should be completed. You will need to complete each section to attain a compliant status:

- Corporate Information
- Directory Listing
- Profile
- Required Questionnaire
- Required Documents
- Permission Profile
- Publish



Corporate Information

To adjust your account information, click **Edit**. After making changes, click **Done** or **Submit** at the bottom left.

Company contact and directory information—This is your general business contact information.

- **Administrator**—This is the person who will be doing the majority of account maintenance, and who will receive account emails.
- **Main HSE contact**—This person will be contacted when the Administrator is unavailable/unreachable.
- **Alternate HSE contact**—This person will be contacted if neither the Administrator nor the Main HSE contact are available.
- **After hours contact**—This person will be contacted for assistance after working hours.

To make changes to the administrator or contact information, you must first choose what type of change you wish to make, based on who the new contact will be:

- To update details for the current administrator or contact, select **Update the Administrator details using the fields below**.
- To replace the current administrator or contact with an individual currently listed as one of the contacts, select **Assign contact [drop-down list] to be Administrator** and select one of the individuals listed in the drop-down list.
- To replace the current administrator or contact with an individual that is registered in the ComplyWorks system but who is not one of your subscription’s administrators or contacts, select **Assign another User as this Subscriber's Administrator. It can be any additional user of your subscription (see Manage Users), or an existing Administrator of another accounts. Verify using their Logon**.
- To replace the current administrator or contact with an individual that is not registered in the ComplyWorks system, select **Replace the Administrator with a new User, using the fields below**.

Users must have an email address that is unique to them. Duplicate emails are not allowed and will cause login issues.

Directory Listing

After you’ve entered information or made changes, click **Save** or **Submit**.

- **Directory page**—To market your company to employing companies, enter a description of your company and the services that you provide.
- **Company logo**—Upload your company logo as a GIF, JPEG or PNG file to display it on your profile.
- **Viewing Options**—Most people select “Public Directory” to allow anyone in our system to see their information. To only let employers that you work for see your information, select “Members Only.”
- **Services provided**—Select the service on the left column and then click >> to add it to your list. Click **Save** to update the list before continuing to the next heading.



Profile

After you've entered information or made changes to a section, click **Save**.

- **Questionnaire builder**—The questionnaire you'll be required to complete will depend on your employers, the industries in which they operate and the country in which you do business. For example, if your employers are in the Canadian oil and gas industry, you will be requested to complete the Canadian HSE Oil & Gas questionnaire. In many cases, your required questionnaires will be pre-selected.
- **Describe your business**—Enter a description of your company and the services you provide.
- **Number of employees**—List the maximum number of employees you had at one time during the previous working year.
- **Operating jurisdictions**—Select the regions in which you are currently performing work and indicate the industry numbers that worker's compensation has assigned to your business (these are pre-assigned to you; do not select the regions or industry numbers for services you would like to provide). Do not specify regions in which you do not hold valid worker's compensation coverage, as this will affect your compliance rating.
 - To select the appropriate industry code(s), click **Select Your Industry Codes**.
 - To arrange the industry codes in order, click the **Industry Number** box at the top of the column and select the appropriate codes. Click **Save** when you're finished.

Required Questionnaire

Enter your health, safety and environmental data (HSE data). For the initial set-up of your account, you should focus on the sections below, because your compliance status is based on them. The remaining questions can be answered later, but we suggest that you complete them as soon as possible. If questions are not applicable to you, you can answer "No" without affecting your status.


- Business information
- Corporate profile
- Insurance
- Worker's compensation
- HSE Program information—System questions
- Safety performance—All of these questions are mandatory except for vehicle mileage. You will not be allowed to publish your safety information if you do provide your safety stats for last quarter.

Permission Profile

In this section, you set the access level for employing companies. We recommend you select "ALL Registered employer companies can access" so that new employing companies can view your information. For more information on setting your Permission Profile and marketing your company to new employers, see [Section 3. Market your company to employers](#).



Review

Double check the information in your profile for accuracy and completeness. This page will notify you when the data in your profile is not complete. Areas that need more attention will be flagged with 

- **View Working Copy**—This displays the answers you have been working on.
- **View Published Data**—This displays data that has been published for your employers to see.
- **Send Report to a Non-Member**—This creates a PDF of the information in your profile. (See [Section 5. Send your information to a non-ComplyWorks employer.](#))

d) Publish your information

In order for your employing companies to see the information you entered, you have to publish it. If you don't publish your information, employing companies will either see no data (if you're entering data for the first time) or old data (if you're updating your information).

- Step 1.** Select **Company** at the top of the page.
- Step 2.** Enter the requested information in "Authorizing Officer of your Company".
- Step 3.** Click **Agree**.
- Step 4.** Click **Publish**.

Questions that need to be answered before you can publish are shown under "Data Quality Advisor".

e) Upload documents

Attach requested documents to your profile. These are required to verify the information you entered in [c\) Enter your information](#). You can upload electronic files or fax the paper versions.

To fax the documents, select the "Paper Fax-In" option and print the bar code page that appears. Fax this along with the required documents to the fax number on the bar code page. (We do not accept documents faxed directly to our main fax number.) When uploading files, please ensure that the process was successful by confirming the submitted date and time under the heading on the documents page.

3. Market your company to employers

Access to a pool of prequalified service providers is one of the top benefits of ComplyWorks that employing companies routinely tell us they use. For example, if a property management company doesn't have a flood restoration specialist in a particular region on its prequalification list, the property manager can use ComplyWorks to search for flood restoration specialists in the area that are compliant with its requirements. Or, if a construction company needs portable heat to help cure concrete, it can search for portable heat vendors in the area that subscribe to ComplyWorks and can get to work the same day.

a) Decide which employing companies can see your profile

To allow your company to be hired by new employing companies, you have to set your permission profile to allow them to see your information. You can do this by allowing all employing companies to see your profile,



or by allowing only selected employing companies to see your profile. If there are companies you don't want to see your information, you can block them while allowing the rest of the employing companies in ComplyWorks to see your profile.

- Step 1.** Log in and click **Company** in the top row.
- Step 2.** Click **Permission Profile** in the left-hand column. The "Employer Company Data Access Permissions" page will appear (Figure 5).
- Step 3.** Select who you would like to see your profile:
 - a) To allow all employing companies to see your profile, select "ALL Registered Employer Companies can access".
 - b) To allow only specific employing companies to see your profile, select "ONLY SELECTED Employer Companies can access".
 - c) To allow all employing companies to see your profile except for ones that you specifically block, select "All EXCEPT SELECTED Employer Companies can access".
- Step 4.** Click **Submit** to change your permission profile.
- Step 5.** If you selected b) or c) in step 3, scroll down to the "Select your target audience" box, and select the companies you would like to see your information or block, respectively.

b) Let employers search for you by service and area

Many employers tell us they use the service and radius search functions more than they use Google or other directories to find new contractors and suppliers in a specific area.

To enable employing companies to find you using the service and radius search functions, you must list the services you provide in the Directory Listing section of your account:

- Step 1.** Log in to ComplyWorks.
- Step 2.** Click **Company**.
- Step 3.** Click **Directory Listing** in the column on the left-hand side.
- Step 4.** In the Viewing Options screen, select **Members only - can be viewed by any registered Employer Company**. This will allow all employers to see your directory listing, but will not release your information to them.
- Step 5.** Click **Save**.
- Step 6.** Click the **Services Provided** tab.
- Step 7.** In the "Available" box, select a service you provide and click >> to move it to the "Selected" box. Repeat this for all the services you offer.
- Step 8.** Click **Save**.



c) Use the ComplyWorks “Ready to Work” logo

The cost and time involved in hiring a contractor or supplier that does not already subscribe to ComplyWorks is significant for employers. To let them know that you subscribe to ComplyWorks and are ready to work, display the ComplyWorks “Ready to Work” logo on your vehicles, equipment, site signs, website, business cards and other marketing material. This logo is only available to ComplyWorks subscribers.

To download electronic files of the logo:

- Step 1.** Log in to ComplyWorks.
- Step 2.** Click **Company**.
- Step 3.** Click **Subscription Benefits** in the left-hand menu.
- Step 4.** Download the appropriate logo:
 - For websites and other electronic materials, download one of the online logos as a .jpg file. Right-click it and select **Save Picture As...** (if you're using Microsoft Internet Explorer) or **Save Image As...** (if you're using Firefox web browser).
 - For business cards, other printed materials, and vehicle/equipment decals, download the logo in .tif format. Under “ComplyWorks ‘Ready to work’ logo for print uses (.tif file)”, right-click the words **Right-click Save Target as... or Save Link as...** and select **Save Picture As...** (if you're using Microsoft Internet Explorer) or **Save Image As...** (if you're using Firefox web browser).

If your printer, web developer or graphic artist requires a different file format, contact support@complyworks.com.

d) Display the “Ready to work” certificate

As a subscriber to ComplyWorks, you can download a “Ready to work” certificate with your company name to display in your office and/or shop. Just remember to print a new one each year after you renew.

- Step 1.** Log in to ComplyWorks.
- Step 2.** Click **Company**.
- Step 3.** Click **Subscription Benefits** in the left-hand menu.
- Step 4.** Scroll down to “Your ComplyWorks Certificate” and click **Click here**.
- Step 5.** Print the certificate that’s displayed.

4. Send your information to a non-ComplyWorks employer

We’ve made it as easy as possible to send the information in your profile to non-ComplyWorks employers. Before you pay to join another service and spend hours entering and re-entering information, we recommend that you send the employer the information you’ve already submitted to ComplyWorks, along with your “Ready to work” certificate. In many cases, this will be enough to satisfy the employer.

- Step 1.** Log in to your ComplyWorks account.
- Step 2.** Click **Company** on the top navigation bar.



- Step 3.** Click **Send Report to a Non-Subscriber Client** in the left-hand column.
- Step 4.** Select the information you want to send.
- Step 5.** In the “Recipient” section, enter the contact details for the person you want to send the information to, along with a message in the “Message” section. If you want to create a PDF of your information that you can print or send by email, enter your own email address.
- Step 6.** Click **Preview and Send Report**.
- Step 7.** Click **Preview the report in a new window**. A PDF with your information will open.
- Step 8.** Click **Send**.

5. Maintain your profile

Over the course of the year, the following may require attention:

- **Worker’s compensation documents**—Depending on the jurisdictions in which you operate, you may have to update your worker’s compensation periodically, as well as the rate sheet.
- **Insurance information**—Insurance documents, policy numbers, expiration dates and insurance provider information must be kept current. If your insurance policy changes, you will need to upload the new insurance certificate and update the “Required Questionnaire” with the new information (i.e. expiry dates, coverage amounts, etc.). If one or the other is not updated, you will receive either an automated notification or a verification note stating that your insurance is out of date; the questionnaire information and the certificate need to reflect the same information.
- **Safety certification**—This must reflect your current status. If your certificate has expired, you will need to upload a current document and update the information in the “Required Questionnaire.”
- **Contact information**—If you move to a new location, change phone numbers or email addresses, etc., please update your contact information so we can get in touch with you when necessary.

If for some reason, your account becomes out of date, we will maintain your data in the condition that is supported by the uploaded documents. This may change your compliance level, which will affect your ability to work for some or all of your employers. For example, if you have adjusted your questionnaire to show new insurance coverage but have not provided a new certificate, we will be required to change the information back to match the existing certificate. This may give you a high risk rating.

6. Take a free training webinar

To help you get the most out of your ComplyWorks subscription, we offer four free training webinars for subscribers each month. To see the upcoming webinar schedule and register for a webinar, go to:

<http://www.complyworks.com/en/NewsAndEvents/Webinars>



7. Contact us if you need help

We are here to help you set up and maintain your account information. To contact us:

In North America

Telephone: 403-253-9584 or 403-219-4792

Email: support@complyworks.com

Our Help Desk is open Monday to Friday from 8 a.m. to 4:30 p.m. (Mountain Time).

In Africa

Phone or email eCompliance Africa, the exclusive distributor of ComplyWorks in Africa, at:

Telephone: +27 (086) 147-3366

Email: support@ecompliance.co.za

