



ONSITE TRACK EASY

Retail FM Contractor Management Portal Portal User Guide: Company Registration



CONTENTS

Overview	3
Login (for companies existing companies)	4
Register your Company (for new companies to site)	6
Complete the Company Profile Questions.....	9
Upload Insurances and Licenses.....	14
Complete Safety Management System Review.....	18

WHERE CAN I FIND HELP?

Pegasus Safety

1300 291 561
safetycompliance@pegasus.net.au

Retail FM Contractor Information Website

<http://wowcontractor.com.au>

OVERVIEW

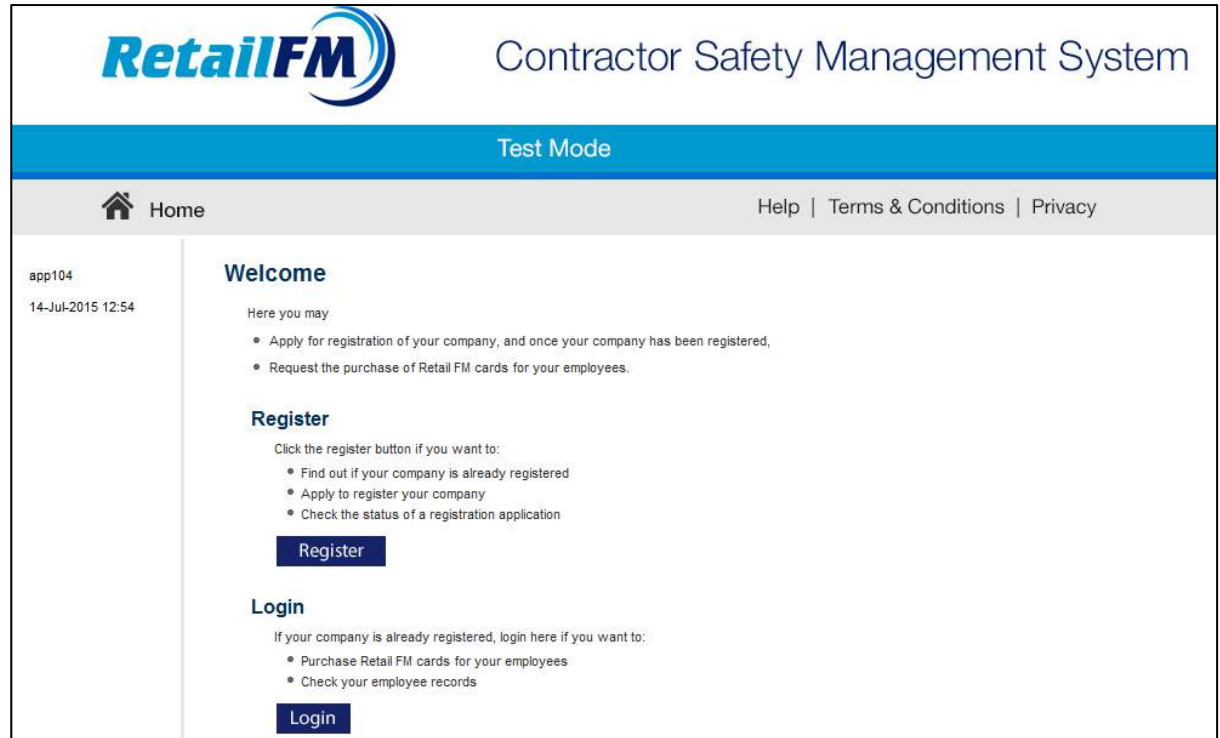
The Retail FM Contractor Safety Management System Portal is the gateway to allow contractors to register and meet the safety compliance requirements of Retail FM. This portal allows the nominated personnel of the contracting company to:

- Register their Company or Business Entity
- Complete the Company Profile Questions
- Upload and maintain relevant company licences and insurances
- Complete the Safety Management System review process
- Register their employees
- Select and upload role requirements
- Upload employee photos for efficient card production
- Book their employees into an induction
- Track employee induction and card status

LOGIN (FOR EXISTING COMPANIES)

a) Go to
<https://secure.onsitetrackeasy.com.au/portal/common/public/login/login.jsp?psn=retailFM&bfpto=1>

b) Click **Login** to access the portal:



The screenshot displays the RetailFM Contractor Safety Management System interface. At the top left is the RetailFM logo, and at the top right is the text "Contractor Safety Management System". A blue banner below the header contains the text "Test Mode". A navigation bar includes a "Home" link with a house icon and links for "Help", "Terms & Conditions", and "Privacy". The main content area is divided into two columns. The left column shows session information: "app104" and "14-Jul-2015 12:54". The right column features a "Welcome" message, a list of actions under "Here you may", a "Register" section with instructions and a "Register" button, and a "Login" section with instructions and a "Login" button.

RetailFM Contractor Safety Management System

Test Mode

Home | Help | Terms & Conditions | Privacy

app104
14-Jul-2015 12:54

Welcome

Here you may

- Apply for registration of your company, and once your company has been registered,
- Request the purchase of Retail FM cards for your employees.

Register

Click the register button if you want to:

- Find out if your company is already registered
- Apply to register your company
- Check the status of a registration application

Register

Login

If your company is already registered, login here if you want to:

- Purchase Retail FM cards for your employees
- Check your employee records

Login

c. Enter username and password and click on **Login**. This will bring you to the home screen. If you have forgotten your password click on **forgotten password** and go to step D.

RetailFM Contractor Safety Management System

Home Help | Terms & Conditions | Privacy

app104
14-Jul-2015 12:23

Login

Enter your username and password to login now.

Username:

Password:

Login

Request a new login for your company: [New User Account](#)
Request new password for your login: [Forgotten Password](#)

d. Enter first name and last name and click on **Submit**

Your login details will be sent your email address (please be sure to check your junk mail as it is an automated email). If you do not receive an email, please contact the help desk on **1300 291 561**.

Forgotten Password

Please enter your first name, last name and email address.

First Name:

Last Name:

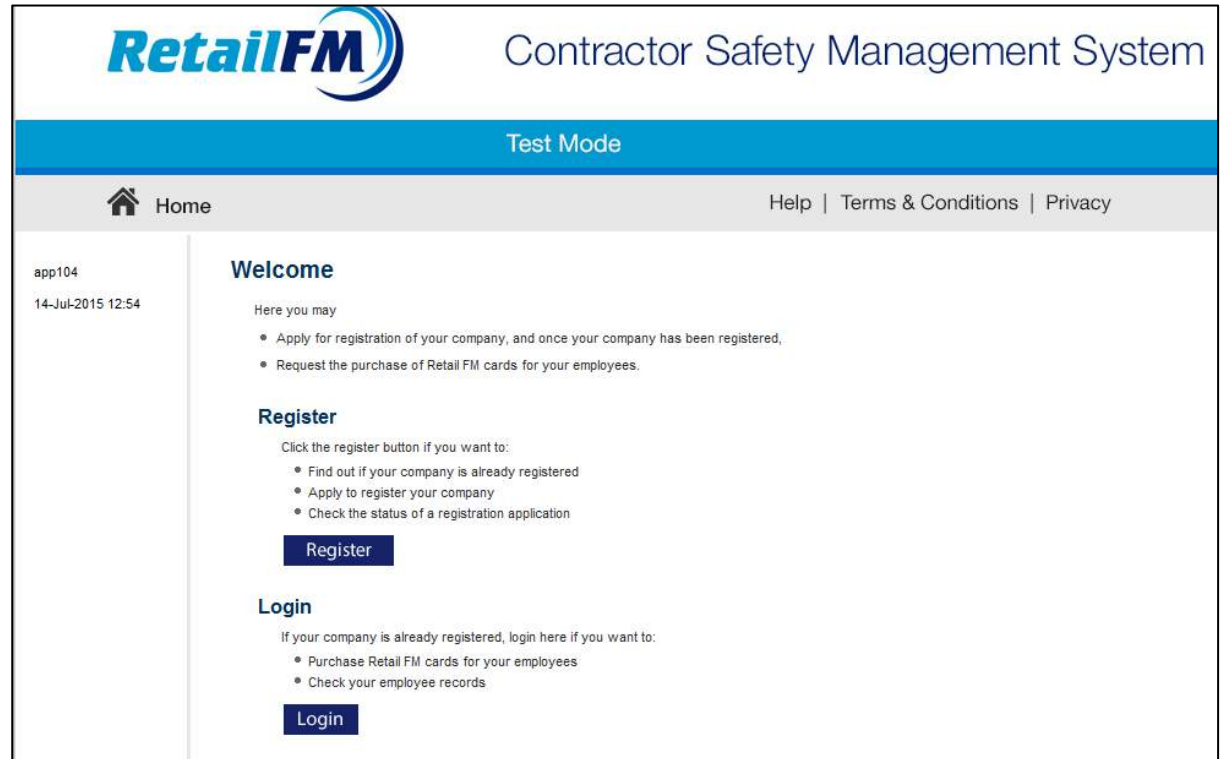
Email Address:

Submit

You must enter the **exact spelling** used when you set up your user account. If these details are correct the password will be sent to your email address.

REGISTER YOUR COMPANY (FOR NEW COMPANIES TO SITE)

- a. Go to <https://secure.onsitetrackeasy.com.au/porta/retailFM/welcome.jsp>
- b. First time setup – click **Register** to enrol your company.



The screenshot shows the RetailFM Contractor Safety Management System interface. At the top, the RetailFM logo is on the left, and the text "Contractor Safety Management System" is on the right. Below this is a blue banner with "Test Mode" in white. A navigation bar contains a home icon and "Home" on the left, and "Help | Terms & Conditions | Privacy" on the right. The main content area is split into two columns. The left column shows "app104" and "14-Jul-2015 12:54". The right column has a "Welcome" heading, followed by "Here you may" and a list of two bullet points: "Apply for registration of your company, and once your company has been registered," and "Request the purchase of Retail FM cards for your employees." Below this is a "Register" heading, followed by "Click the register button if you want to:" and a list of three bullet points: "Find out if your company is already registered", "Apply to register your company", and "Check the status of a registration application". A blue "Register" button is positioned below the list. Further down is a "Login" heading, followed by "If your company is already registered, login here if you want to:" and a list of two bullet points: "Purchase Retail FM cards for your employees" and "Check your employee records". A blue "Login" button is positioned below the list.

c. Click on **Add** to register your company

Company Registration

Use **find company** to find your contracting company in the Retail FM registration database.

Registration may involve the supply of certain documentation to satisfy Retail FM compliance requirements, and if your company's application is approved you will be able to apply for work cards for those of your employees who are suitably qualified.

Find Company

Enter a fragment of your company's name and click **search** to find matching companies. To prevent duplication, please check here before using **add company** below.

Search

Add Company

If you are not sure whether your company is already registered, use **find company** above. Otherwise add it here. You will need to supply company name, address, contact details and documents.

Add

d. Enter your company's ABN or Lookup ABR for ABR, then click **Continue**

Add Company

Please select the country and click **continue**.

Australian companies must also have their ABN. Use this button to find ABNs in the Australian Business Register. **Lookup ABR**

Country:

ABN:

Continue

e. Click on your **company name**

Add Company

There is 1 trading name for this ABN.
Please click the name you wish to use for this company.

Trading Name

Australia Pegasus Pty Ltd

f. Complete the template and select **Submit** (entering all mandatory data marked with *)

g. You will receive notification that your company details have been sent to Pegasus Safety for approval

Please note: additional users can be setup at log in.

h. Pegasus Safety will complete the approval process and upon approval you be emailed that registration is complete (**you will receive a separate email containing your user name and password**).

Add Company

To register your company please provide the following (* = mandatory).

1. Company

Name:

Country:

ABN:

Phone: *

Mobile:

Fax:

Website:

Postal Address

Address: *

Town: *

State/Province: *

Postcode: *

Delivery Address same as postal

Address:

Town:

State/Province:

Postcode:

2. User

First Name: *

Last Name: *

Email: *

3. Declaration

My name is: *

I am an authorised representative of this company.

Submit

- ▶ When you click **submit** this information will be supplied to Pegasus Safety who process these company registrations.
- ▶ When it has been processed a notification email will be sent to the user nominated above.
- ▶ After approval your user will be able to add new users and log into this portal to get Onsite cards for your employees.

Add Company

Thank you, **Lauren** has been approved and you may now log into this portal.

An email has been sent to with your login details.

Press **continue** to log in now.

Continue

COMPLETE THE COMPANY PROFILE QUESTIONS

- a. Once you complete the registration and your company has been approved, you can **Login** to the portal

RetailFM Contractor Safety Management System

Test Mode

Home | Help | Terms & Conditions | Privacy

app104
14-Jul-2015 12:54

Welcome

Here you may

- Apply for registration of your company, and once your company has been registered,
- Request the purchase of Retail FM cards for your employees.

Register

Click the register button if you want to:

- Find out if your company is already registered
- Apply to register your company
- Check the status of a registration application

Register

Login

If your company is already registered, login here if you want to:

- Purchase Retail FM cards for your employees
- Check your employee records

Login

b. Click **Apply** to start the company Profile Questionnaire

c. Complete the Company Profile questions by answering a series of Yes/No, and multiple choice questions to enable the system to categorise your company based on the Retail FM Contractor Safety Management System.

d. When answering the question about the type of work your company performs on a Retail FM site, please specify the work your direct employees perform only. If you engage sub-contractor to perform work on your behalf and this work requires a license,

eg. plumbing or electrical trade licenses, you should not put these types of work on your profile. It is your responsibility as a head contractor to ensure your sub-contractors have the correct licenses to perform the work.

e. If you are a subcontractor you will still need to register your company and induction your employees. When completing your registration please select no to invoicing Retail FM direct.

f. When answering the question on which state/s you are registered for Workers Compensation Insurance, you will only need to specify the states that you have a Workers compensation insurance policy for, as you will be prompted to provide a policy for each state you select.

g. Once you have answered all questions, you may be required to pay for a registration and provide supporting documentation.

RetailFM Contractor Safety Management System

Test Mode

Home Logout | User Settings | Help | Terms & Conditions | Privacy

app104
14-Jul-2015 13:09
Rhiannon Manning
Pegasus Mining Personnel Pty Ltd

Pegasus Mining Personnel Pty Ltd

To use this portal your company must satisfy the Retail FM Compliance Requirements.


To meet this standard please complete the following steps:

- Complete a Company Profile questionnaire.
- Purchase the relevant Compliance Subscription.
- Upload specified Insurances and Licences.
- Possibly undertake a Safety Management System review.

Click this button to apply for a subscription and commence the Company Profile questionnaire. Once the process has been started you can save it and come back to continue it at any time. **Apply**

Registration
Profile
Portal Access
Uploads
SMS Review

- h. Once you have answered all questions, you are required to pay for the registration. The cost will depend on the Category you are assigned. Click on **Add To Cart** to start the payment process



Contractor Safety Management System

Test Mode

Home | Logout | User Settings | Help | Terms & Conditions | Privacy

app104
14-Jul-2015 13:17
Rhiannon Manning
Pegasus Mining
Personnel Pty Ltd

Registration

Profile

Company Profile

Work Activity

Portal Access

Uploads

SMS Review

Done

You have successfully completed the Company Profile and can proceed to the next step.

- You may now purchase your Subscription for the following compliance category.
- This will allow you to upload Insurances and Licences and to maintain the currency of your compliance records.

Type:	Category 1b
Duration:	2 Years
Expires:	14 Jul 17
Cost:	\$500.00 (plus GST)

- Renewal will be required on an annual basis to update your company profile, insurances and licences.


Click the **add to cart** button to purchase this subscription. **Add To Cart**

Shopping Cart
Total Cost: *empty*

Back

- i. Review the cost and details of the registration, and click on

Proceed To Checkout



Review Shopping Cart


Company:	Pegasus Mining Personnel Pty Ltd
User:	Rhiannon Manning
Total:	\$550.00 inc GST

Line	Qty	Item	Person	Unit Cost	Unit GST	Cost (ex)	Cost (inc)	Description	Remove
1	1	Company Compliance Subscription		\$500.00	\$50.00	\$500.00	\$550.00	Retail FM Company Compliance Subscription from 14 Jul 2015 to 14 Jul 2017.	remove
Total:							\$550.00	including GST of \$50.00	

Back
Proceed To Checkout

- j. Enter credit card details and click

Continue



Checkout Shopping Cart

Company:	Pegasus Mining Personnel Pty Ltd
User:	Rhiannon Manning
Total:	\$550.00 inc GST

PURCHASE

Purchase Order
 Credit Card


Card Number:
 Card Type: ▼
 Card Expiry: ▼ / ▼
 Card CVV:
 Cardholder Name:

Please enter your credit card details and click **continue** to process the purchase

CURRENTLY OPERATING IN TEST MODE
 These auto populated credit card values should produce a successful payment

Back
Continue

- k. Click **Continue** to Proceed to the File Upload section



Checkout Shopping Cart

Company:	Pegasus Mining Personnel Pty Ltd
User:	Rhiannon Manning

Purchase Successful

Tax Invoice/Receipt

- Thank you for your purchase. Below is the Tax Invoice/Receipt.
- A copy of this has been emailed to you. Click the **Download** button to access it now.

Invoice Number	Total (inc GST)	Method	Details
161981	\$550.00	Credit Card	Download

Logout **Continue**

UPLOAD INSURANCES AND LICENSES

- a. You are now required to provide any insurances and Licenses that are required to perform your duties on a Retail FM site.
- b. If you have existing Insurances/Licenses, the system will recognise these and you will not be required to upload again.
- c. For any new Insurances/Licenses that we have not previously collected, you will be required to upload them by clicking **Upload**

The screenshot displays the 'RetailFM Contractor Safety Management System' interface. The header includes the RetailFM logo and the system name. A navigation bar contains links for Home, Logout, User Settings, Help, Terms & Conditions, and Privacy. The main content area is titled 'Insurances' and features a sidebar with navigation options: Registration (checked), Profile (checked), Portal Access (checked), and Uploads. The main form area shows a mandatory field for 'Public Liability Insurance' (marked with a red asterisk and a red 'x' icon). The field contains the text 'Insurance.Liability.Public and / or Product_' and a prompt: 'Please upload a copy of your Public Liability Certificate of Currency'. A red note below the field states 'Please upload a single file'. An 'Upload' button is positioned to the right of the field. A 'Next' button is located at the bottom right of the form area.

d. Browse to the relevant electronic version of the Insurance or License that you are prompted for and Select **Upload**;

- enter the **Start Date** and **End Date** for the Licence/Insurance,
- Enter as much information as possible from the insurance policy as possible.

Please Note: This information must match the details in the document you are uploading.

Upload File for Pegasus Management Pty. Limited

Verified doc

The file you upload here is classified as a *Verified doc*, which means:

- it must be an **official document** that genuinely represents the description below
- it must clearly contain the **name of the company** shown above
- it must contain **start and end dates** which need to be entered in the fields below

If any requirement is not met, the upload and Company Compliance Subscription will be rejected!
If you have any questions contact the portal administrator listed on the help menu.

Description: Public Liability Insurance

Requirement: Please upload a copy of your Public Liability Certificate of Currency

File to Upload: * C:\Users\vmanning\Desktop\TEST.pdf Browse... Browse to select file for upload

Name: * Friendly name for this file after upload

Start Date: * (must match upload file) Enter start date as "dd mmm yy" or click calendar icon

End Date: * (must match upload file) Enter end date as "dd mmm yy" or click calendar icon

Insurance Details

Insurer: Insurer's name

Policy Number:

Item: Description of this insurance

	Name	Amount
Amount:	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	Total:	<input type="text" value="0"/>

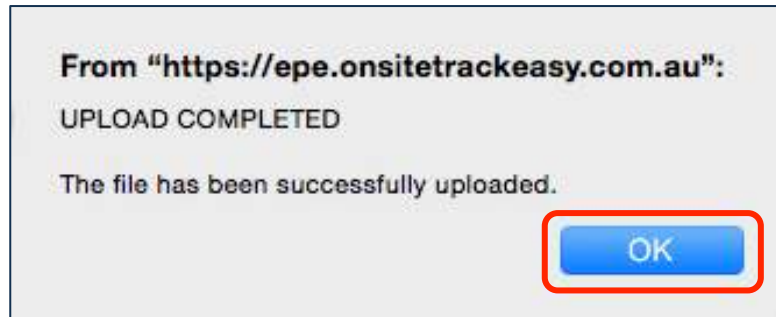
Up to 3 separate insured amounts in this insurance policy can be named and detailed here. The total amount will be automatically calculated.

Conditions: Conditions specified in the policy

Comment: Any comment you for the person who will process this upload

Status: Upload

e. Click **OK** when the below message appears



f. Once you have completed uploading all the requested files, click **Next**

g. If you are required to upload licence continue the above process and move on to the next section

h. If you are required to upload acknowledgements you will first need to click on the downloadable file, complete the acknowledgement and upload

The screenshot shows the RetailFM Contractor Safety Management System interface. At the top left is the RetailFM logo, and at the top right is the text "Contractor Safety Management System". Below this is a navigation bar with "Home", "Logout", "User Settings", "Help", "Terms & Conditions", and "Privacy". The main content area is titled "Insurances" and includes a sidebar on the left with a progress indicator for "Registration", "Profile", "Portal Access", and "Uploads". The "Insurances" section shows a mandatory field "1.1 * Public Liability Insurance" with a green checkmark and a document icon. Below this is a table with columns for Name, Issue, Expiry, Comment, Open, Edit, and Remove. The table contains one row with the name "TEST", issue date "01 Jan 2015", and expiry date "01 Jan 2016". A "Next" button is located at the bottom right of the interface.

Name	Issue	Expiry	Comment	Open	Edit	Remove
TEST	01 Jan 2015	01 Jan 2016			Edit	Remove

- i. Once all uploads are complete click [Submit](#)
- j. Pegasus Safety will review and approve the documents you have provided, and upon approval you will receive email notification.

Done

You have successfully completed the **Uploads** and can proceed to the next step.

- You may now submit your Uploads for validation.
- Once submitted you will be able to continue with the SMS Review.

Click the button to **submit** your data.

[Submit](#)

COMPLETE SAFETY MANAGEMENT SYSTEM REVIEW

Depending on the answers you provided in the Company Profile section, you may be required to complete a Safety Management System review. This section will be different for each company, as it will prompt you for information based on the answers you provided to certain questions in the Company Profile.

You may be asked to upload evidence and examples of your Safety Management System, so please have these available when you complete this review.

- a. To start the Safety Management System Review, please select **Yes**, and then click

Next

- b. Please answer all questions and upload documents as required.

The screenshot shows the 'RetailFM Contractor Safety Management System' interface. The page is in 'Test Mode' and displays the 'SMS Review' section. On the left, a progress bar shows 'Registration', 'Profile', 'Portal Access', and 'Uploads' as completed (green checkmarks), and 'SMS Review' as the current step (yellow square). The main content area contains a mandatory field (1.1) with a red asterisk, asking the user to complete the SMS review. It lists required documents: SMS Policy, Environmental Policy, SMS Procedures, High Risk Activity Procedures, and Examples of relevant evidence. Below the text, there is a question 'Are you ready to start the SMS Review?' with a radio button for 'Yes' highlighted by a red box. A 'Next' button is visible in the bottom right corner.

RetailFM Contractor Safety Management System

Test Mode

Home Logout | User Settings | Help | Terms & Conditions | Privacy

app104
14-Jul-2015 13:25
Rhiannon Manning
Pegasus Mining Personnel Pty Ltd

Registration
Profile
Portal Access
Uploads
SMS Review
SMS Review

SMS Review

* Denotes Mandatory Field

1.1 * You are now required to complete the SMS review.
You are required to provide information relevant to your Safety Management System (SMS). Depending on the risk category assigned to your company as part of the profiling, you may be required to provide documented evidence of your SMS. Please ensure you have your SMS documentation available while completing this section. These documents may include, but are not limited to:

- SMS Policy
- Environmental Policy
- SMS Procedures
- High Risk Activity Procedures, e.g. Hot works, Working at Heights,
- Examples of relevant evidence e.g. inductions, Organisation Charts, Safety Observations.

If you are unable to complete the SMS Review in one session your work will be saved upon exit. The next time you login, you will be able to continue on from where you finished your last session. You can only submit the SMS review once ALL documentation has been provided.

Are you ready to start the SMS Review?

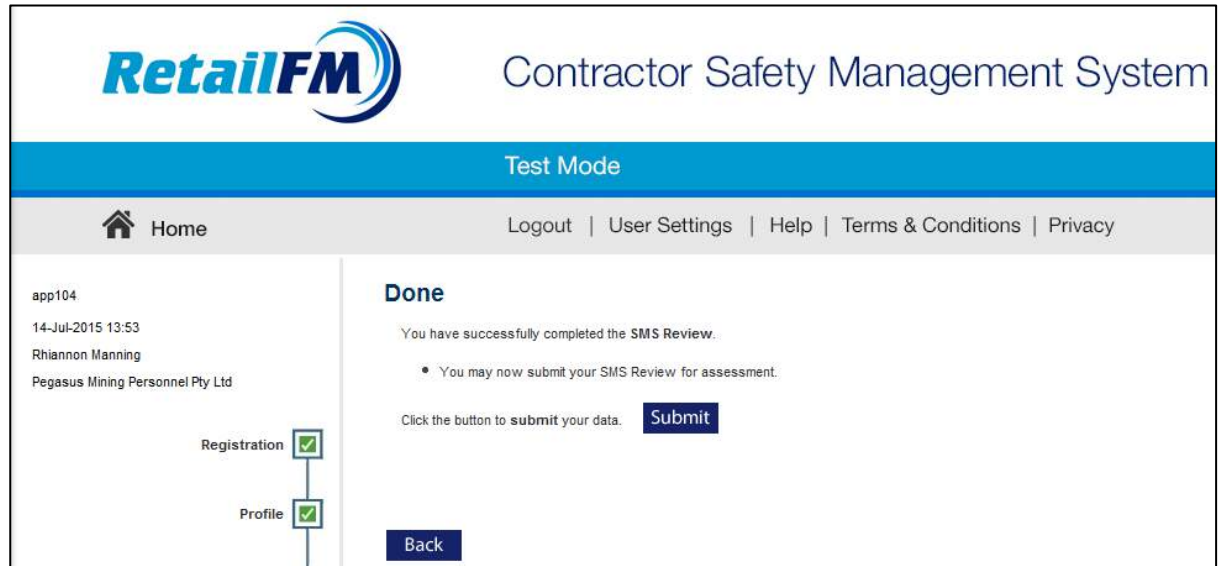
Yes

Next

c. When you have completed the Safety Management System Review, click

Submit

d. Pegasus Safety will review the answers and documented evidence you have provided and will provide you with feedback and any Corrective Actions that you need to address.



WHERE CAN I FIND HELP?

Pegasus Safety

1300 291 561
safetycompliance@pegasus.net.au

Retail FM Contractor Information Website

<http://wowcontractor.com.au>