

Supplier Portal – Managing Compliance

How to navigate around the Supplier functionality in the new platform



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Managing Your Account

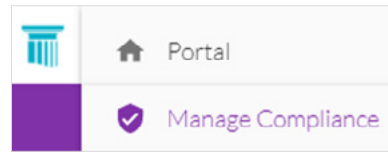
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Managing Compliance

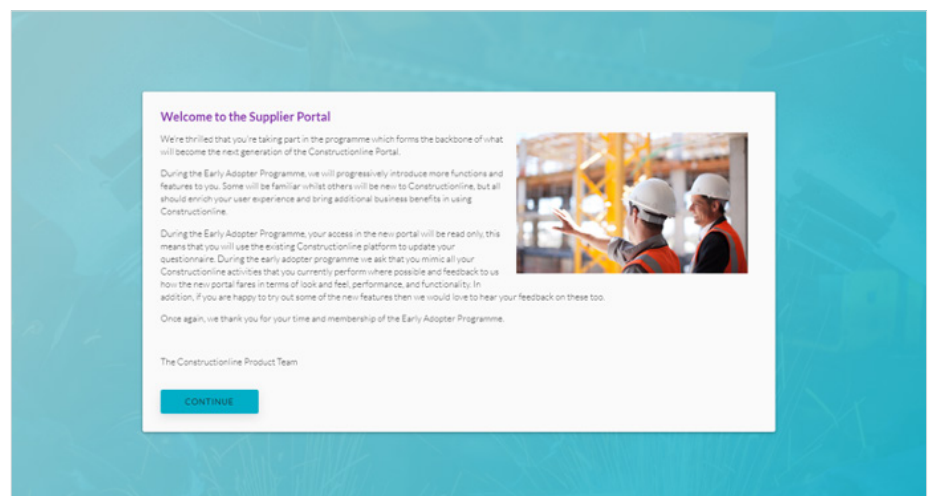
Manage Compliance

User permissions will determine what options are available to you on the left-hand side of the navigation.

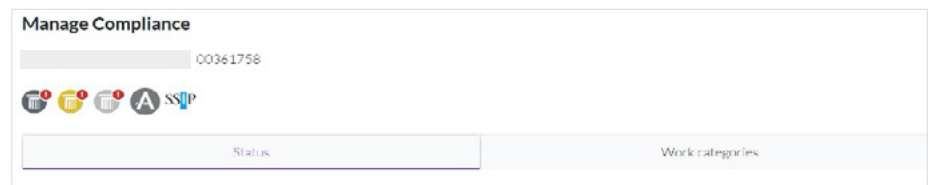
In order to access supplier functionality and manage your profile, you will see the “**Manage Compliance**” option on the left.



Once you have selected this option, you will be presented with our supplier portal welcome page, and to progress through to the “**Manage Compliance**” tab, you will need to select the “**Continue**” button.



Upon selecting the “**Continue**” button you will see the “**Manage Compliance**” page.



At the top of this page you will see the following:

- Company Name
- Constructionline Registration Number
- Any previously updated details

Managing Compliance

Below this you will see the compliance details. This will show the levels relevant to the plans that you have signed up for.

The screenshot shows the 'Manage Compliance' interface for company 00361758. It features a navigation bar with 'Status' and 'Work categories' tabs. Below this are three main sections: 'Level', 'Work Categories', and 'Buyer Connections'. The 'Level' section lists Platinum, Gold, and Silver as 'Not verified' (indicated by a red exclamation mark), while SSIP Acclaim and SSIP DTS are 'Verified'. The 'Work Categories' section shows 4 categories as 'Not verified' and 6 as 'Verified'. The 'Buyer Connections' section is currently empty. A 'Request help' button is visible in the bottom right corner.

If a level that you have signed up for is not verified, then a red exclamation mark will be shown to show that action is needed. For all levels that have been verified, no red exclamation mark is shown.

A smaller version of the 'Manage Compliance' dashboard, showing the company name 'Company Limited', ID '00361758', and last update date '16/07/2020'. It highlights the compliance levels and work categories sections.

The page is split into two parts:

1. **Status** – This is where compliance can be viewed, as well as question answers and work categories.
2. **Work Categories** – This is where work categories can be managed

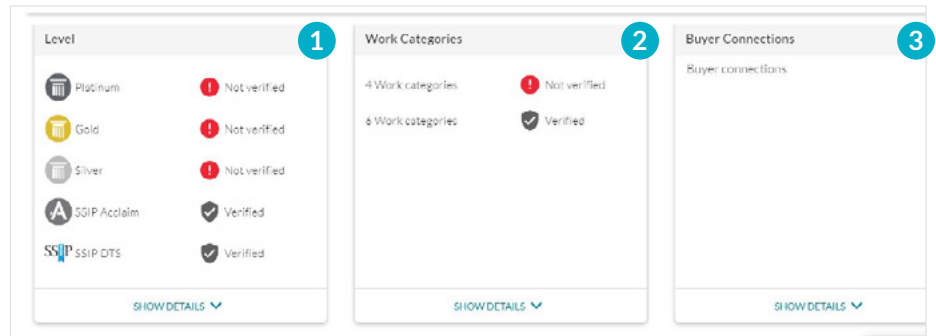
This screenshot is identical to the one above but includes callouts. A blue circle with the number '1' points to the 'Status' tab in the navigation bar. A blue circle with the number '2' points to the 'Work categories' tab in the navigation bar.

Managing Compliance

Status

Within the status area you will see three sections:

1. **Level** – This shows the plans you have along with the verification status for each.
2. **Work categories** – This shows the verification status for the work category itself.
3. **Buyer connections** – This will show you the buyers that you relate to, along with the compliance status for those buyers.



Levels

In order to view the details for compliance for the level you are on (e.g. Silver), you can select “**Show Details**” under the levels box. This is where you would go to understand what section within your plans needs attention.

Against each section, you can also see which sections are applicable to which plans, and what the verification status is for each section. To view details, select the downwards chevron next to that section.

The screenshot shows a table titled 'Level Requirements'. It lists various requirements with their verification status and a 'View' icon. The requirements are: Building Information Modelling (BIM), Corporate and Professional Standing, Corporate and Social Responsibility, Environmental Management, Equal Opportunity and Diversity, and Financials. Each row has a 'View' icon with a dropdown arrow.

On viewing the details, you can see each requirement. These columns can be sorted, so if you want to bring the details of any non-verified section at the top, you can sort by column “**Status**”.

To look at the details and change any answers you will need to select “Edit” next to the requirement.

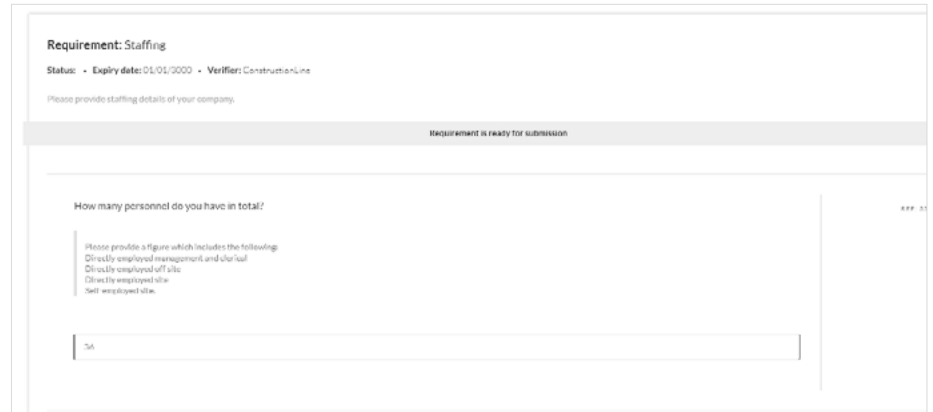
The screenshot shows a table titled 'Identity'. It has columns for Requirement, Status, Business, Address, and Verified On. Each row has an 'EDIT' link. The requirements listed are: Primary Contact, Registered Office, Company Detail, Enquiry Contact, and Head Office. All are marked as 'Verified'.

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Please note that at this stage, all editing of answers currently needs to be done within the existing Constructionline portal.

Upon selecting **“Edit”**, the details and responses for that requirement will be shown.

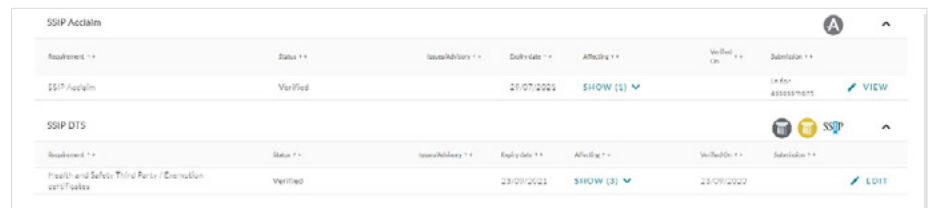
To exit this, select **“Close”** at the top of the page.



SSIP

Bronze, Gold and Platinum levels need to have an SSIP to be verified, if you don't hold an SSIP with a 3rd party, you will need to complete the SSIP Acclaim requirement at the bottom of the list.

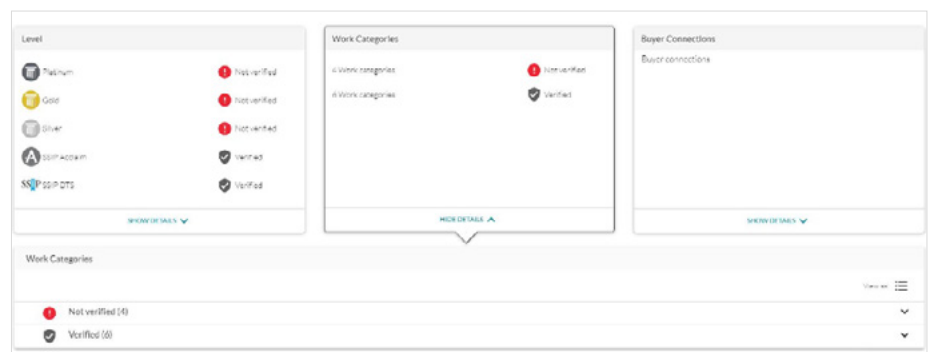
Silver level can complete the SSIP Acclaim, but you can be verified to Silver without passing your Acclaim.



Work Categories

This area is where you can view the work categories as well as the status of the work categories.

To view in more detail, simply select the **“Show Details”** tab. If you would like to edit any section, then please select **“Edit”** next to the work category.



Managing Compliance

Please note this value cannot exceed 75% of your overall turnover.

Work Category: BATTERY MONITORING
Section: Contractor • Notation: 01799 • Expiry date: 16/06/2020

Enter a maximum contract value for which you have undertaken work for the above category in the past 2 years.
Note that this value cannot exceed 75% of your current turnover.
Please be aware that you may need to provide a reference to support the value entered here.
For Consultant and Material Supplier categories the value entered should be the fee paid for the selected category.

Please specify, by selecting from the dropdown, to what extent you would sub-contract this category of work

Select...


SAVE Cancel

The following requirements need to be met for this category.

Requirement	Status	Standard	Expiry Date	Verified On	Attaching
Electrical requirements	Not Verified				

SHOW (1) EDIT

In here you can provide information on the contract value for that work category.

 This amount is greater than 75% of the current turnover that was declared in the Financial Details section.

You can also select whether this work is sub-contracted.

Please specify, by selecting from the dropdown, to what extent you would sub-contract this category of work

Always sub-contract this work

Lastly you can view requirements for that work category.

This will be only be available if you are required to have licence in the category of work you have selected. To add/remove your licence, please select **“Edit”**.

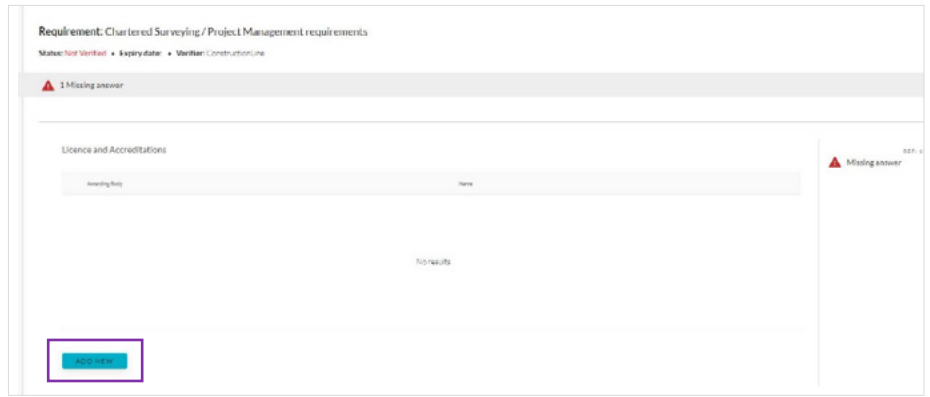
The following requirements need to be met for this category.

Requirement	Status	Standard	Expiry Date	Verified On	Attaching
Chartered Surveying / Project Management requirements	Not Verified	Vibrac Categories / Trades			

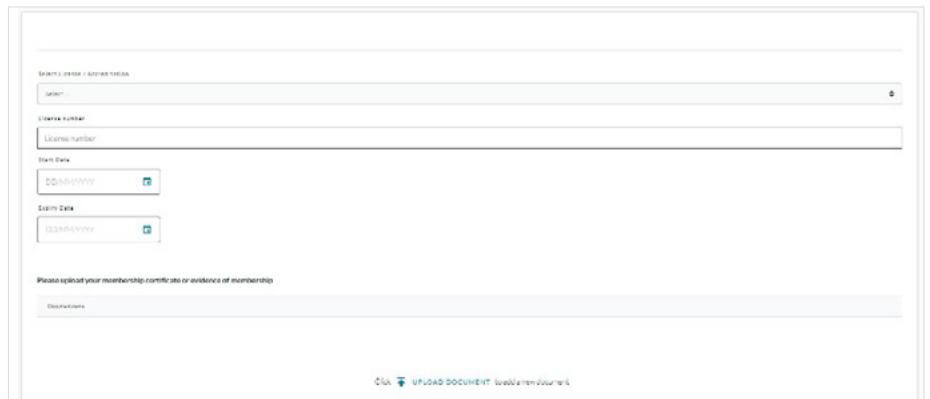
SHOW (1) EDIT

Once you select **“Edit”**, there will be options to add your Licences.

Managing Compliance



You will be able to select your Licence, provide licence number and the register the date matching with the certificate or evidence you provide.



Once completed, please press **“Save”** at the top of the page and mark **“Ready for assessment”** or **“Submit”** it for verification.

Buyer Connections

This is currently in development and will show buyers that you are both connected along with showing you the compliance for that buyer.

Work Categories Tab

The next section is **“Work Categories”**. In this page you will be able to edit your work categories, by either removing them or adding new ones. Again, all editing for now needs to be done in the existing portal.

