



# LinkSafe

## USER GUIDE

COMPANIES, WORKERS & VISITORS



## Please note

The workflow of the LinkSafe system is highly customisable and not all aspects of this user guide may apply to all systems. It has been written in general terms to describe the most typical scenarios.

## Completing pre-qualifications

### Getting started

Your first step in using the LinkSafe system is to complete your pre-qualification. Your client will send you an invitation email through the system with a link to access the questionnaire.

To start your pre-qualification:

1. **Click the link in your invitation email.**  
The introduction screen appears in a new browser window.
2. **Enter your email address and click Start.**  
The passcode screen appears and a passcode email is sent to you.
3. **Enter the passcode provided and click Continue.**  
The Main Menu appears.
4. **Click Start A New Form.**  
The pre-qualification questionnaire appears.

**Note:** The passcode is valid for 30 minutes following its issue. You are sent a new passcode if you need to suspend your progress and resume later. The passcode is only used to verify your email address and can be disregarded once you complete the pre-qualification.

### Using the questionnaire

Use the Back and Next buttons to move through the pre-qualification questionnaire. Complete every question and upload all documents required. Ensure you enter your ABN correctly as this is checked against the Australian Business Register.

Once you complete your pre-qualification, click the Confirm My Submission button at the end. You are sent a submission receipt with a copy of your answers for your records. The submission email also includes a receipt number that you can quote if you need to contact your client with any questions.

You are notified by email when your pre-qualification has been reviewed.

### Suspending your pre-qualification

Your pre-qualification is automatically saved as you move through the questionnaire. If you need to pause your progress, simply close the browser. You can use your invitation link to resume the pre-qualification.

If you delete or misplace your invitation email, you can send yourself a link to resume the pre-qualification by clicking Save As Draft.

To resume your pre-qualification:

1. **Click the invitation or resume link in your invitation or suspension email.**  
The introduction screen appears in a new browser window.
2. **Enter the same email address you used to start the pre-qualification and click Start.**  
The passcode screen appears and a passcode email is sent to you.
3. **Enter the passcode provided and click Continue.**  
The Main Menu appears.
4. **Click Continue on the incomplete pre-qualification.**  
You are returned to the last page you completed.

**Note:** The system prevents duplicate pre-qualifications by checking the ABN. If you have a pre-qualification in progress and want to start over, delete it before starting a new one.

## Subcontractor pre-qualification

Your approval email may contain a link that you can distribute to any of your subcontractors that need to complete a pre-qualification of their own.

Your company is identified as the principal contractor to any company that submits a pre-qualification using this link.

If you don't have your pre-qualification approval email handy, you can retrieve the subcontractor pre-qualification link using the Contractor Portal.

To retrieve the subcontractor pre-qualification link, open the Company Details screen, open the Resources tab, select the required client and click Resend Link. The link is sent to you via email.

## Renewing your pre-qualification

The LinkSafe system tracks the expiry of your pre-qualification. 21 days prior to expiry, you are sent a reminder email to renew. You also receive a notification if your pre-qualification has been rejected.

**Note:** Reminder emails continue to be sent on a weekly basis until you renew the pre-qualification.

To renew or re-submit your pre-qualification, click the link in your reminder or rejection email and follow the steps described in "Getting started" above. If you're amending a rejected pre-qualification, your previous answers are pre-filled.

**Note:** Records that have an expiry date are excluded from pre-qualification renewals.

## The Contractor Portal

### Introduction

The Contractor Portal is a system provided to company administrators to monitor their workers' inductions and update their details.

To register for the Contractor Portal:

1. **Click the Contractor Portal link in your pre-qualification approval email.**  
The New User Registration screen appears in a new browser window.
2. **Ensure your details are correct and click Register.**  
A welcome email is sent to you.

**Note:** If your client adds a new contact to your company's profile, and that person does not have a LinkSafe account, they are sent an email inviting them to register for one.

## Managing workers

You can use the Contractor Portal to update workers' details and statuses and view their completed inductions and credentials.

To export a report of your workers:

1. **Open the Workers screen and click the Report button.**  
The Email Report window appears.
2. **Enter the email address you want the report delivered to and click Send.**  
The report is sent to the email address.

To view and edit a worker's details:

1. **Open the Workers screen and click the worker entry.**  
The Update Worker Details window appears.
2. **Make the required changes and click Save Changes.**  
The changes are saved.

The Inductions and Compliance Items tabs display the inductions that the worker has completed and the credentials that the worker has uploaded.

To retrieve a worker's ID card:

1. **Open the Workers screen and click the worker entry.**  
The Update Worker Details window appears.
2. **Open the Inductions tab and click the Download Certificate button on the appropriate course.**  
The ID card is downloaded.

To re-send an expiry reminder email to a worker:

1. **Open the Workers screen and click the worker entry.**  
The Update Worker Details window appears.
2. **Open the Inductions or Compliance Items tab and click the Send Reminder button on the appropriate course or compliance item.**  
The reminder is re-sent.

To make a worker inactive:

1. **Open the Workers screen and click the worker entry.**  
The Update Worker Details window appears.
2. **Change the Status field to Inactive.**  
If the worker is already inactive, then you can select Active to reverse this procedure.
3. **Type a reason for the change and click Save.**  
The worker's status is updated.

**Note:** If one of your workers is made inactive by your client, you are sent a notification email.

If you need to induct a new worker and don't have your pre-qualification approval email handy, you can send the worker an induction link directly.

To send an induction link to a new worker:

1. **Open the Workers screen, select the required client and click Induct New Worker.**  
The Induct Worker window appears.
2. **Select the required induction and enter the workers' email addresses.**  
You can separate email addresses with a space, semi-colon or new line. You can also paste from another program (for example, if you have an existing list in Excel).
3. **Click OK.**  
The workers receive induction links.

If you have a worker who has already completed a client's induction in another company's name, you can associate them with your own company without having them re-register and complete another induction.

When signing into site, the LinkSafe app allows the worker to choose which company they're representing on that visit. All compliance checks are performed against the chosen company.

To associate an existing worker from another company with your own:

1. **Open the Workers screen, select the required client and click Link Existing Worker.**  
The Search For Worker window appears.
2. **Enter the worker's PIN and last name and click Find.**  
The Link Existing Worker window appears.
3. **Verify the worker's details and click OK.**  
The worker is associated with your company.

To remove a worker's association with your company:

1. **Open the Workers screen and click the worker entry.**  
The View Linked Worker Details window appears.
2. **Click Unlink Worker and click Yes on the confirmation popup.**  
The association is deleted.

### Updating details

You can use the Contractor Portal to administer your company's contact and financial information.

To update your company information:

1. **Open the Company Details screen and open the Business Details tab.**  
Ensure your details are being edited for the correct client by setting the Company field.

2. **Make the required changes and click Save.**

The changes are saved.

To add a new contact:

1. **Open the Company Details screen, open the Business Details tab and click Add Contact.**

The Add Contact window appears.

2. **Use the Contact Type field to categorise the contact.**

Primary can't be selected as there can be only one primary contact.

3. **Complete the other details.**

The Contact Type, First Name, Last Name, Email and Reminder Emails fields are mandatory.

4. **Use the Reminder Emails field to choose whether the new contact should receive reminder emails.**

If you choose Selected Record Types, the Reminder Types field appears. You can use this to further customise which reminder emails are sent.

5. **Click OK.**

The new contact is created.

To edit an existing contact:

1. **Open the Company Details screen, open the Business Details tab and click the contact name.**

The Edit Contact Details window appears.

2. **Make the required changes and click OK.**

The changes are saved.

To delete an existing contact:

1. **Open the Company Details screen, open the Business Details tab and click the contact name.**

The Edit Contact Details window appears.

2. **Click the Delete button and click Yes on the confirmation popup.**

The contact is deleted.

## Deactivating your company

If you no longer service a client, you can make your company profile inactive by archiving it. By doing this:

- your workers are made inactive and cannot sign in at site;
- your induction links and access to the Contractor Portal are disabled; and
- you and your workers don't receive reminder emails to update your pre-qualification, records, inductions or credentials.

To make your company inactive:

1. **Open the Company Details screen.**

Ensure your details are being edited for the correct client by setting the Company field.

2. **Click the Archive My Company button.**

The Archive My Company window appears.

3. **Type a reason for the archival and click Yes, Proceed.**

Your company profile is deactivated for the chosen client. If this is the only client administered by your Contractor Portal account, you are redirected out of the system.

**Note:** This procedure cannot be undone except by speaking with your client.

## Site history

The Contractor Portal allows you to view the site history of your workers, including when they signed into and out of clients' sites, and the results of spot checks performed on them.

This information is available on the Site History screen. A Report function is available as with the Workers screen.

Worker profiles also contain a Sites tab that shows the same information specific to that worker.

## Managing permits

If your client has invited you to apply for a permit to perform certain types of work on their site, you can use the Contractor Portal to complete the application.

To respond to a permit application:

1. **Open the Permits screen and click the permit entry.**  
The Submit a Work Permit window appears.
2. **On the General tab, review the existing information and complete any required fields.**  
Most information is pre-filled by your client.
3. **On the Permits tab, review each permit type and complete the safety checklist item.**  
You must answer every question Yes to proceed.
4. **On the Templates tab, download any of the files attached by your client to complete.**  
This step is optional depending on whether your client included any files.
5. **On the Documents tab, upload your risk assessment and other documents.**  
You can attach as many files as required.
6. **Click Submit Application.**  
The permit application is sent for review.

Once your client approves your application, the permit is available for selection by any of your workers at the chosen site and time when signing in.

The Permits screen also contains details of previous permits applied for by your company or workers. A Report function is available as with other screens.

### Renewing records

The LinkSafe system tracks the expiry of your records. 21 days prior to expiry, you are sent a reminder email to renew. You also receive a notification if any of your records have been rejected.

**Note:** Reminder emails continue to be sent on a weekly basis until you renew the record.

To renew or re-submit a record via a reminder email link:

1. **Click the renewal link in your reminder or rejection email.**  
The New Document Upload screen appears in a new browser window.
2. **Click Browse to search your computer or device for the document and click OK.**  
The document is uploaded.
3. **Complete the other details and click Start Upload.**  
The record is sent for review.

**Note:** You are sent a notification email when your record has been approved.

To renew or re-submit a record via the Contractor Portal:

1. **Open the Compliance screen and click the Update button on the appropriate record.**  
The Update Compliance Item(s) screen appears.
2. **Attach the document and click Next.**  
The record details tab appears.
3. **Click Next, enter the other details and click Upload.**  
The records are sent for review.

The Contractor Portal also allows you to submit a single record renewal to multiple clients at once. This saves you having to submit the same file over and over.

To renew a record for multiple clients at once:

1. **Open the Compliance screen and use the checkboxes on the left to select which records to update.**  
You can use the Keywords search field to narrow down the list.
2. **Click the Update Selections button.**  
The Update Compliance Item(s) screen appears.
3. **Attach the document, click Next and complete the other details.**  
You need only enter the reference and expiry date on one line as you can use the Copy To All button to pre-fill the others.
4. **Click Upload.**  
The records are sent for review.

**Note:** Each client completes their own review of the document.

### Managing tasks

LinkSafe Forms is a system that your client can use to create questionnaires to gather any sort of information about their business and manage action items they raise.

When a client submits a form that includes a task assigned to you, it appears on the Tasks screen and a notification email is sent to your primary contact.

**Note:** The Keywords search covers the Task ID and Description fields.

To view a task, open the Tasks screen and click the task entry.

The Task Info tab displays the task's basic details. Click the media thumbnails to view them in full and click Browse to upload additional files.

The Form Info tab shows information about the form that raised the task, including the user that submitted it and the associated form question.

When you've completed the task, you can submit it for review.

To submit a task:

1. **Open the Tasks screen and click the task entry.**  
The Submit Task window appears.
2. **Complete the Response section.**  
The Media field is optional.
3. **Click the Submit button and click Yes on the confirmation popup.**  
The task is submitted and a confirmation email is sent.

### Completing inductions

#### Registering for PINs

Your pre-qualification approval email contains a link to undertake your induction. This link is associated with your company only and should be distributed to your workers.

**Note:** You can also distribute this link to your subcontractors that aren't pre-qualified in their own right. Their workers are associated with your company.

Before accessing an induction, each worker must register for a unique PIN. This is an eight-digit number that identifies the worker and acts as their username to access the induction system and sign into site.

To register for a PIN:

1. **Click the Induction link in your pre-qualification approval email.**  
The PIN Registration screen appears in a new browser window.
2. **Click Continue, complete your personal details and choose a password.**  
Mandatory fields are marked with an asterisk. The password must be between 8 and 15 characters long and include at least one number and special character (a punctuation mark).
3. **Click Continue and click Finish.**  
The induction portal appears and a confirmation email is sent to you.

**Note:** The PIN is not interchangeable. If you do business with more than one client, your workers need to register for a PIN for each client.

#### The induction portal

The induction portal is a website that hosts links to the induction. You can access this from the link in your PIN confirmation email.

To undertake your induction:

1. **Click the induction portal link in your PIN confirmation email.**  
The induction portal appears in a new browser window.
2. **Click the required induction button, click Continue and enter your PIN or mobile number and password.**  
A forgotten PIN/password function is available if needed.
3. **Click Continue, verify your personal details and click Continue.**  
The induction welcome page appears.

## Submitting your credentials

If the client you're undertaking the induction for requires you to upload trade licences and credentials, these are prompted for before the induction welcome page appears.

To upload your credentials:

1. **After verifying your personal details, click Continue.**  
The Trade Credentials screen appears.
2. **Click Browse to search your computer or device for the document and click OK on the confirmation popup.**  
The document is uploaded.
3. **Complete the other details.**  
It's important that you enter the reference number and expiry date exactly as they appear on the document.
4. **Repeat steps 2 and 3 for each mandatory credential.**  
You can also upload other credentials on an optional basis if needed.
5. **Click Continue.**  
The induction welcome page appears and the credentials are sent for review.

## Undertaking your induction

Use the Back and Next buttons to move through the induction content. Each slide has a minimum reading time, which has been calculated according to the amount of content. The Next button is disabled until this amount of time has elapsed.

All multiple-choice questions must be answered correctly. If you answer a question incorrectly, the question is flagged and you get a chance to try again. If you answer too many questions incorrectly, you are returned to the start of the induction.

Any external documents must be read before continuing. In several cases these include a checkbox that must be filled before you can continue. In turn, the checkbox is disabled until the document has been opened.

## Suspending your induction

If you need to pause your progress with an induction, you can suspend it.

To suspend an unfinished induction, click the Close/Suspend link in the bottom left-hand corner and click Suspend Course. An induction suspension email is sent to you.

To resume a suspended induction, click the link in your suspension email and click Continue Course in the new browser window. The induction is restarted from the last page you completed.

**Note:** The suspension link can only be used once. Repeat the procedure if you need to pause the induction again.

## The ID card

When you complete the induction, you are sent a confirmation email with your ID card attached in PDF and Apple Wallet formats.

The ID card includes the following information:

- your name, company and trade type;
- your photo;
- your PIN and induction expiry date;
- your contact details; and
- a QR code for signing into site.

You can print the card and cut it out to fit in a wallet or lanyard or store it on your phone.

## Renewing your inductions and credentials

The LinkSafe system tracks the expiry of your inductions and credentials. 21 days prior to expiry, you are sent a reminder email to renew. You also receive notification if any of your credentials have been rejected.

To renew your induction:

1. **Click the induction portal link in your reminder email.**  
The induction portal appears in a new browser window.
2. **Click the required induction button, click Continue and enter your PIN or mobile number and password.**  
A forgotten PIN/password function is available if needed.
3. **Click Continue, verify your personal details and click Continue.**  
The induction welcome page appears.

To renew or re-submit a credential:

1. **Click the renewal link in your reminder or rejection email.**  
The New Trade Credentials Upload screen appears in a new browser window.
2. **Click Browse to search your computer or device for the document and click OK.**  
The document is uploaded.
3. **Click Upload.**  
The credential is sent for review.

## The Inductee Portal

### Introduction

You can use the Inductee Portal to monitor your inductions and update your personal details.

To log into the Inductee Portal:

1. **Click the Inductee Login link in your PIN confirmation email.**  
The inductee login screen appears in a new browser window.
2. **Enter your PIN and password and click Login.**  
A forgotten PIN/password function is available if needed.

**Note:** The link to the Inductee Portal is <http://www.inducteeportal.linksafe.com.au>.

### Managing inductions

The Inductions tab displays all inductions available for your PIN. You can perform different actions depending on the status of each induction:

- If the status is Not Taken, you can start a new induction.
- If the status is About To Expire or Expired, you can renew the induction.
- If the status is Taken, you can download a copy of your ID card if one was originally generated.

### Updating your details

You can use the Inductee Portal to administer your personal information.

To update your personal information:

1. **Open the Account tab and make the required changes.**  
Note that your name can't be edited through the Inductee Portal. Contact the company if you need to change this.
2. **To change your photo, click the photo image.**  
The Update My Photo window appears.
3. **Click Browse to search your computer or device for the photo and click OK.**  
The new photo is saved.
4. **Click Save My Details.**  
The changes are saved.

To change your password:

1. **Open the Account tab and click the Change My Password button.**  
The Change My Password window appears.
2. **Type your old password, choose a new one, retype it to confirm and click OK.**  
The new password is saved.

To regenerate your ID card after changing your details, open the Account tab and click Reissue My Certificate. Induction confirmation emails with the updated cards are sent to you.

**Note:** Following this procedure regenerates ID cards for every induction where one is available for your PIN. If you want to download one card at a time, open the Inductions tab and click the Download Certificate button on the required induction. Note that this downloads the card on file rather than regenerating a new one.

## Signing into site

### Using the app as a contractor

When you arrive on site, you need to sign in using the LinkSafe app on a tablet provided.

To sign into site using the app:

1. **Tap the Contractor button.**  
The Validate screen appears.

2. **Enter your PIN and tap Validate or tap Scan QR Code and position the QR code on your ID card in the camera's field of view.**  
The Permit Selection screen appears (or if you failed the compliance check, the Access Denied screen appears—await instructions from your site contact if this happens).
3. **Select which permits you need to apply for and tap Continue.**  
The Work Detail screen appears.
4. **Enter the details of your permit application, using the Add buttons to attach images of your risk assessments and SWMSs, and tap Continue.**  
The Permit Checklist screen appears.
5. **Ensure each item is checked and enter your permit commencement time.**  
If the password field is visible, your site contact needs to complete this before you can continue. You need to repeat this step for every permit.
6. **Tap Continue.**  
The Photo screen appears.
7. **Tap Take Photo.**  
The Camera screen appears.
8. **Tap the Camera icon to take your photo.**  
The photo is capture and you are returned to the Photo screen.
9. **Tap the Sign Here button.**  
The Signature screen appears.
10. **Enter your signature and tap Capture.**  
You are returned to the Photo screen.
11. **Tap Sign In and collect your visitor label from the printer.**  
You are signed in.

To sign out:

1. **Tap the Sign Out button and tap Contractor.**  
The Sign Out screen appears.
2. **Tap Scan QR Code and position the QR code on your ID card or visitor label in the camera's field of view, or tap PIN, enter your PIN and tap Sign Out.**  
You are signed out.

### Using the app as a visitor

The LinkSafe system replaces conventional visitor logbooks and allows visitors to sign into site using the same app that workers use.

To sign in as a visitor:

1. **Tap the Visitor button.**  
The Visitor Registration popup appears.

If you're a new visitor:

2. **Tap the New Registration option.**  
The Details screen appears.
3. **Enter your personal details and tap Continue.**  
The Site Contact screen appears.

If you're a returning visitor:

2. **Tap the Already Registered option.**  
The Search screen appears.
3. **Enter your details and tap Search.**  
The Site Contact screen appears. If your search terms result in more than option, select the appropriate one before continuing.
4. **Tap the Name field, select who you're visiting and tap Sign In.**  
The Induction screen appears.
5. **After reading the induction page, tick the I Agree checkbox and tap Next.**  
Repeat this step as many times as necessary. After completing the induction, the Photo screen appears.
6. **Tap Take Photo.**  
The Camera screen appears.
7. **Tap the Camera icon to take your photo.**  
The photo is capture and you are returned to the Photo screen.
8. **Tap the Sign Here button.**  
The Signature screen appears.
9. **Enter your signature and tap Capture.**  
You are returned to the Photo screen.
10. **Tap Sign In and collect your visitor label from the printer.**  
You are signed in and your contact is notified of your visit.

To sign out:

1. **Tap the Sign Out button and tap Visitor.**  
The Sign Out screen appears.
2. **Enter your details and tap Search or tap Scan QR Code and position the QR code on your visitor label in the camera's field of view.**  
You are signed out.

### Using a QR code to sign in

If the site you're attending is unmanned, the site may display a LinkSafe QR code for you to scan with your smartphone instead of providing a tablet.

To sign into site using a QR code, scan it using any available QR reader app, or your device's own camera app if possible. The Sign In screen appears in a new browser window.

**Note:** There is a LinkSafe QR Reader app available for free on the Android platform that you can use if you have issues scanning QR codes.

After reaching the Sign In screen, the procedure for signing in and out is similar to signing in using the app, although there are a few key differences:

- Workers can identify using their PIN or mobile number. Identifying by scanning the QR code on your ID card is not available.
- A "remember me" function is available which saves your details for your next visit.
- Signatures are not required.