



Your People. Our Passion

Manage Expiring Items Vault Contractor - Portal



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Manage Expiring Items

Introduction

In Vault Contractor, after you, as a contractor have been prequalified by a company there are certain items, such as insurance policies or licences, that can expire or need to be renewed that you will need to keep up-to-date to allow you to stay compliant.



Contractor Portal



Manage Expiring Items

Introduction Cont.

View and update items

Re-answer Prequalification



In this guide, we'll show how to view and update these items as well as how to re-answer your Prequal questionnaire in the Contractor Portal to keep your records up to date with your contractor company.

Manage Expiring Items

View Expiring Items

To view any Expiring items first login to the Contractor Portal, and then view the Expiration Items table shown on the Dashboard menu.

Here you can view and update any items such as Insurances or Licences that are about to expire, or that have already expired.

The screenshot displays the 'KaBoom Demolitions' Contractor Portal. The left sidebar contains a 'Dashboard' menu with options: Contractor Portal, Companies, Assessments, Workers, Insurances, Subcontractors, My Company Details, Users, My Settings, Notifications, and Logout. The main content area is titled 'Action Items' and features two sections: 'Assessments' and 'Expiring Items'. The 'Assessments' section shows a table with columns for Company, Status, and Date, but it contains no records. The 'Expiring Items' section shows a table with columns for Policy Type, Insurer, Policy No, Status, and Date. It contains one record: Public Liability, AMI, PLI 36598412748, Expired, and 28/12/2018. The status 'Expired' is highlighted in red. Both tables include filters, a 'Show 10 entries' dropdown, and 'Previous'/'Next' navigation buttons.

Assessments Table:

Company	Status	Date
No Records Found		

Expiring Items Table:

Policy Type	Insurer	Policy No	Status	Date
Public Liability	AMI	PLI 36598412748	Expired	28/12/2018

Manage Expiring Items

Edit Expiring Items

The screenshot displays the VULT dashboard for KaBoom Demolitions. The left sidebar contains navigation links: Dashboard, Companies, Assessments, Workers, Insurances, Subcontractors, My Company Details, Users, My Settings, Notifications, and Logout. The main content area is divided into two sections: 'Action Items' and 'Expiring Items'. The 'Assessments' section under 'Action Items' is currently empty, showing 'No Records Found'. The 'Expiring Items' section contains a table with the following data:

Prequalification	Company	Question	Status	Date	Actions
High Risk	KaBoom Demolitions	Approved Handlers	Expired	20/04/2020	Actions Edit Answer

To edit one of these expired items, first click 'Actions', then 'Edit Answer'

And update the form as required.

Manage Expiring Items

View Expiring Items

You can also update these items even if they are not expiring.

To update any items from the Prequalification Answers such as insurance policy details, **click** on 'Assessments', and locate the company you wish to update your details for.

The image displays two screenshots of the KaBoom Vault Contractor Portal interface. The top screenshot shows the 'Assessments' section, which is currently empty, displaying 'No Records Found'. The bottom screenshot shows the 'Expiring Items' section, which contains a table of assessment records. The table has columns for Company, Manager, Qualification, Assigned Date, and Status. Three records are listed, all with a status of 'Accepted'.

KaBoom Vault Contractor Portal - Assessments

Filters: Show 10 entries

Assessments Company Status Date

No Records Found

Showing 0 to 0 of 0 entries

Previous Next

KaBoom Vault Contractor Portal - Expiring Items

Assessments

Company Manager Qualification Assigned Date Status

Demo Inc.	Steve Stevenson	High Risk	21/04/2023	Accepted	Actions
Demo Inc.	Steve Stevenson	High Risk	10/02/2023	Accepted	Actions
Demo Inc.	Steve Stevenson	High Risk	27/07/2017	Accepted	Actions

Showing 1 to 3 of 3 entries

Previous Next

Manage Expiring Items

Edit Expiring Items

The screenshot displays the 'Assessments' page in the KaBoom Demolitions system. The page features a sidebar with navigation links and a main content area with a table of assessments. A modal window is open, showing details for a specific assessment.

Assessments Table:

Company	Manager	Qualification	Assigned Date	Status
Demo Inc.	Steve Stevenson	High Risk Cancel	21/04/2020	Accepted
Demo Inc.	Steve Stevenson	High Risk	10/02/2020	Accepted
Demo Inc.	Steve Stevenson	High Risk	27/07/2017	Accepted

Showing 1 to 3 of 3 entries

Assessment Details (Modal):

- Company: Demo Inc.
- Risk Level: High Risk
- Status: Accepted
- Assigned Date: 21/04/2020
- Terms and conditions: Below are terms and conditions created by Demo Inc.: Full Terms and conditions

Next, either **click** 'Actions', then 'View',

Or **click** on the 'Qualification field'

Then **click** 'Re-answer Prequal'. This will allow you to make any required changes, such as adding a new or renewed insurance policy.



Manage Expiring Items

View Expiring Items Cont.

Once you have updated all required prequal answers **click** 'Back to Questions List'

The screenshot displays the 'KaBoom Demolitions Contractor Portal' interface. The top navigation bar is orange with the 'VAULT' logo on the left and the user name 'David Van Boom' on the right. A sidebar on the left lists various portal sections: Dashboard, Companies, Assessments, Workers, Insurances, Subcontractors, My Company Details, Users, My Settings, Notifications, and Logout. The main content area is titled 'Prequalification / High Risk / Answers' and shows '5 of 7 Questions'. A blue button labeled 'Back to Questions List' is at the top left of the question area, and orange buttons for 'Previous Question' and 'Next Question' are at the top right. The current question is titled 'Approved Handlers' and contains two parts: a text input field for 'Do you have approved handlers for substances?' with a dropdown menu showing 'Yes' and 'No', and a text input field for 'If yes, provide details including expiry date' with a date picker showing '20/04/2022'. Below these is a section for 'And/or attach certificates' which includes a file upload area with a '0 b' indicator, a 'Remove file' button, and a 'Drop files to upload (Or Click)' instruction.

Manage Expiring Items

Submit Prequal Answers

The screenshot displays the VULT KaBoom Demolitions web application. The top navigation bar is orange with the VULT logo and the user name 'David Van Boom'. The left sidebar contains a menu with options: Dashboard, Companies, Assessments, Workers, Insurances, Subcontractors, My Company Details, Users, My Settings, Notifications, and Logout. The main content area is titled 'Assessments / Demo Inc. - High Risk' and features two buttons: 'Edit Answers' and 'Submit Answers'. Below this, there is a 'Details' section with a table showing company information: Company Name (Demo Inc.), Status (High Risk), Date (20/05/2020), and Terms and Conditions of 'Demo Inc.'. A 'Prequalification Questions' section follows, listing various checks with green checkmarks: Insurances (Generic), Event Investigations, Event Register Reviewed, Event Reporting, Approved Handlers, Environmental Policy, and Safety Data Sheets. The bottom section is a table of qualification records. The table has columns for Qualification, Assigned Date, Status, and Actions. The first row shows a 'High Risk' qualification assigned on 20/05/2020 with a 'Pending' status. The subsequent three rows show 'High Risk' qualifications assigned on 21/04/2020, 10/02/2020, and 27/07/2017, all with 'Accepted' status. The table is paginated with 'Previous', '1', and 'Next' buttons.

Qualification	Assigned Date	Status	Actions
High Risk	20/05/2020	Pending	Actions
High Risk Current	21/04/2020	Accepted	Actions
High Risk	10/02/2020	Accepted	Actions
High Risk	27/07/2017	Accepted	Actions

Then 'Submit Answers'. This will send your revised prequalification answers back to your Contractor company to review...

And your Qualification Status will now be shown as 'Pending'.

Manage Expiring Items

Update a Licence

To update a licence, click on
Workers,

Then locate the worker whose
licence you wish to add.

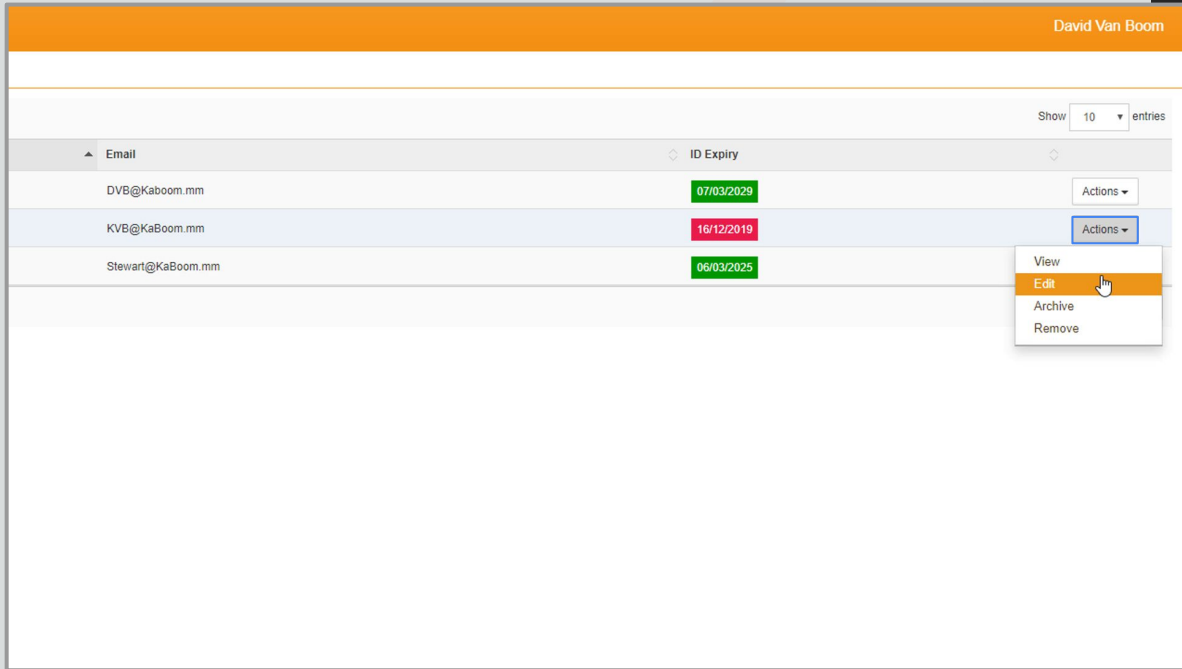
The screenshot displays the KaBoom Demolitions Contractor Portal. The left sidebar menu includes: Dashboard, Companies, Assessments, Workers (highlighted with a blue border), Insurances, Subcontractors, My Company Details, Users, My Settings, Notifications, and Logout. The main content area shows the 'Workers' section with a table of workers and their licence expiry dates.

Name	Email	Expiry	Action
David Van Boome	dvb@kaboom.nl	2023-01-01	Actions
Koen Van Boome	kvb@kaboom.nl	2023-01-01	Actions
Stewart Graham	stewart@kaboom.nl	2023-01-01	Actions

Showing 1 to 3 of 3 entries

Manage Expiring Items

Update a Licence Cont.



David Van Boom

Show 10 entries

Email	ID Expiry	
DVB@KaBoom.mm	07/03/2029	Actions
KVB@KaBoom.mm	16/12/2019	Actions
Stewart@KaBoom.mm	06/03/2025	

- View
- Edit
- Archive
- Remove

Next, **click** 'Actions', then edit.

Or, click on the workers name, then click edit.

Manage Expiring Items

Update a Licence Cont.

Or, click on the workers name, then click edit.

The screenshot displays the KaBoom Demolitions software interface. The top navigation bar is orange with the 'VAULT' logo on the left and the user name 'David Van Boom' on the right. A sidebar on the left contains a menu with options: Contractor Portal, Dashboard, Companies, Assessments, Workers (highlighted), Insurances, Subcontractors, My Company Details, Users, My Settings, Notifications, and Logout. The main content area is titled 'Workers' and features a search bar, a filter dropdown set to 'All', and an 'Add' button. Below this is a table with columns for Name, Email, ID Expiry, and Actions. Three workers are listed: David Van Boome, Kevin Van Boome, and Stewart Graham. The 'ID Expiry' column shows dates in colored boxes: green for David Van Boome (07/03/2019), red for Kevin Van Boome (16/12/2019), and green for Stewart Graham (06/03/2020). The 'Actions' column has a dropdown menu for each worker. Below the table, it says 'Showing 1 to 3 of 3 entries' and has 'Previous' and 'Next' buttons. An inset window shows the 'Personal Details' and 'Licence' for the selected worker, Kevin. The 'Personal Details' section includes fields for First Name (Kevin), Middle Name (Bucky), Last Name (Van Boome), Email (kvb@kaboom.com), and Contact Number (+6026887050). The 'Licence' section shows the Contractor company (KaBoom Demolitions), Licence Number (PG1782338), Version Number (4), and Expiry Date (16/12/2019). An 'Edit' button is visible in the top right corner of the inset window.

Name	Email	ID Expiry	Actions
David Van Boome	DVB@KaBoom.mm	07/03/2019	Actions
Kevin Van Boome	KVB@KaBoom.mm	16/12/2019	Actions
Stewart Graham	Stewart@KaBoom.mm	06/03/2020	Actions

Showing 1 to 3 of 3 entries

Previous Next

Personal Details | Licence

First Name: Kevin
Middle Name: Bucky
Last Name: Van Boome
Email: kvb@kaboom.com
Contact Number: +6026887050
Contractor company: KaBoom Demolitions
Licence Number: PG1782338
Version Number: 4
Expiry Date: 16/12/2019

Manage Expiring Items

Personal Details Tab

The screenshot shows a web application interface with a sidebar on the left containing a menu: Dashboard, Companies, Assessments, Workers (highlighted), Insurances, Subcontractors, My Company Details, Users, My Settings, Notifications, and Logout. The main content area is titled 'Companies that this worker will work for'. Below this title is a form with the following fields:

- First Name *: Kevin
- Middle Name
- Last Name *: Van Boome
- Contact Number Type: Work Mobile (dropdown)
- Contact Number: 0274 987 559 (with a flag icon)
- Contact Email: KVB@KaBoom.mm
- Select Identification Type: Driving Licence (dropdown)
- Driver Licence Number *: PQ57823598
- Driver Licence Version Number: 5
- Driver Licence Issue Date *: 22/05/2019
- ☐ No Expiry
- Driver Licence Expiry *: 21/05/2023
- Upload a copy of your Licence: Upload File (in jpg, png or pdf only) with a 'Browse' button.

At the bottom of the form are two buttons: 'Save' and 'Cancel'.

There are two ways to edit a Licence.

Either update the Licence details on the 'Personal Details' tab by overtyping existing details and **clicking** 'Save', which will create a new Licence record that will be used as the *Workers Identification*

Manage Expiring Items

Licences Tab

Or click on the Licences tab and click Actions on the target licence, then edit

...and update as required.

Note that For both of these methods if you edit only the Expiry Date field this licence record will simply update the Expiry Date. However, if you edit any other details, such as the Licence Number, then a new record will be created.

The screenshot shows the 'Licences' tab in the Contractor Portal. The interface includes a sidebar with navigation links: Dashboard, Companies, Assessments, Workers, Insurances, Subcontractors, My Company Details, Users, My Settings, Notifications, and Logout. The main content area displays a table of licences. The table has columns for Licence Type, Licence Number, Expiry Date, Comments, Files, and Active. A single record is shown: 'Driving licence' with Licence Number 'PQ57K23598' and Expiry Date '21/06/2023'. The 'Active' column shows a green checkmark. An 'Actions' dropdown menu is open for this record, showing options: View, Edit, and Remove. The top of the page shows the user 'David Van Boom' and the 'Workers - Kevin' section. The bottom of the table indicates 'Showing 1 to 1 of 1 entries'.

Licence Type	Licence Number	Expiry Date	Comments	Files	Active
Driving licence	PQ57K23598	21/06/2023		No file	✓

Manage Expiring Items

Edit an Insurance Policy

The screenshot displays the VAOULT Contractor Portal interface. On the left, a sidebar menu lists various sections: Dashboard, Companies, Assessments, Workers, Insurances (highlighted with a blue box), Subcontractors, My Company Details, Users, My Settings, Notifications, and Logout. The main content area is titled 'Dashboard' and features a section for 'Action Items' and 'Assessments'. Below these, there is a table of 'Insurances' with columns for Policy Type, Insurer, Amount, Policy No., Coverage, Start, Expiry, Media, and Status. The table lists two policies: Professional Indemnity Insurance and Public Liability Insurance. The Professional Indemnity Insurance policy is highlighted with a blue box, and its 'Status' is 'Active'. The Public Liability Insurance policy has a 'Status' of 'Expired'.

Policy Type	Insurer	Amount	Policy No.	Coverage	Start	Expiry	Media	Status
Professional Indemnity	A&B	1000000.00	P 32054812457	Professional Indemnity Insurance	18/06/2019	18/06/2021		Active
Public Liability	A&B	10,000,000	PL130558432146	Public Liability Insurance	28/12/2017	28/12/2018		Expired

Finally, to renew any Insurance policy details, **click** on 'Insurances'.

Any previous insurance policies you initially added when filling out the prequalification questionnaire will be shown in the register.

Manage Expiring Items

Licences Tab

Insurance Policies can be renewed or deactivated using the 'actions' button.

The screenshot shows the 'Insurance' tab in the KaBoom Demolitions system. The interface includes a sidebar with navigation options: Dashboard, Companies, Assessments, Workers, Insurance (selected), Subcontractors, My Company Details, Users, My Settings, Notifications, and Logout. The main content area displays a table of insurance policies with columns for Policy Type, Insurer, Amount, Policy No, Coverage, Start, Expiry, Media, Status, and Actions. Two policies are listed: Professional Indemnity and Public Liability. Both have an 'Actions' button next to them. The status of the Professional Indemnity policy is 'Active' (green) and the Public Liability policy is 'Expired' (red). The table shows 'Showing 1 to 7 of 7 entries'.

Policy Type	Insurer	Amount	Policy No	Coverage	Start	Expiry	Media	Status	Actions
Professional Indemnity	AMI	10000000.00	PI 32054812457	Professional Indemnity Insurance	18/06/2019	18/06/2021		Active	Actions
Public Liability	AMI	10,000,000	PLJ 36598412748	Public Liability Insurance	28/12/2017	28/12/2018		Expired	Actions

Manage Expiring Items

Edit an Insurance Policy

KaBoom Demolitions

Insurances

Filters Add Add/Edit Broker

Show 10 entries

Policy Type	Insurer	Amount	Policy No	Coverage	Start	Expiry	Media	Status	Actions
Professional Indemnity	AMI	10000000.00	II 32654812457	Professional Indemnity Insurance	18/06/2019	18/06/2021		Active	Actions
Public Liability	AMI	10,000,000	PLI 36598412748	Public Liability Insurance	28/12/2017	28/12/2018		Expired	Actions

Showing 1 to 7 of 7 entries

Renew Insurance

Policy Type *
Public Liability

Insurer *
AMI

Amount *
10,000,000

Policy No. *
PLI 36598412748

Coverage *
Public Liability Insurance

Start Date *
DD/MM/YYYY

Expiry Date *
DD/MM/YYYY

Drop files to upload (Policy Documentation)

Maximum file upload size allowed is 10MB. Supported files are pdf, jpg and png

Save Cancel

To renew an Existing Insurance policy, **click 'Actions'**, then 'Renew' and fill in the details, first by choosing the policy type from the picklist.

You can choose 'other' to manually type in an insurance type if the options from the picklist do not apply.

Then fill in the rest of the mandatory fields, and finally, **click 'Save'** to apply the changes.



Manage Expiring Items

Edit an Insurance Broker

You can also update your Insurance broker details if these changed by **clicking 'Add/Edit Broker'**. Fill in the details and click save to apply.

Help with other Vault Contractor related topics is available in the support portal.

The screenshot displays the 'Insurances' section of the Vault Contractor application. It features a table with columns for Policy Type, Insurer, Amount, Policy No, and Coverage. The table lists two entries: 'Professional Indemnity' with insurer 'AMI' and amount '10000000.00', and 'Public Liability' with insurer 'RACV'. An 'Add/Edit Broker' modal form is open, showing fields for Broker Name (AMI), Broker Contact Person (John Smith), Email (john.smith@ami.com), Phone (034578987), and Address Information (22 High Street, Melbourne). The modal has 'Save' and 'Cancel' buttons.

Policy Type	Insurer	Amount	Policy No	Coverage
Professional Indemnity	AMI	10000000.00	II 32654812457	Professional Indemnity Insuranc
Public Liability	RACV			

Showing 1 to 2 of 2 entries

Broker Name

AMI

Broker Contact Person

John Smith

Email

john.smith@ami.com

Phone

034578987

Address Information

22 High Street, Melbourne

Save Cancel

