COS Quick Reference Guide

CSMS – Subcontractor Company – Unshare employees and unlink from principal contractor companies

Introduction

The purpose of this Quick Reference Guide (QRG) is to provide instructions to subcontractor companies on how to unshare employees and unlink the relationship with principal contractor companies in the Contractor Safety Management System (CSMS).

Other QRGs have covered the processes to establish subcontractor relationships and to share employees with those linked companies. For the information in this guide to be relevant, the following must be true:

- Your company has received and accepted a request to be a Subcontractor from another company within the CSMS – this would be the Principal Contractor in your relationship.
- Your company will have subsequently shared some or all of your Employees with that principal contractor company, along with any other companies that are linked above them. (This hierarchy of contractors is explained in the "Manage Subcontractor Relationship" QRG).

The CSMS provides functionality for either the Principal Contractor or the Subcontractor to sever the link, and also to unshare any shared employees.

Note: This guide focusses on the options available to Subcontractors. These actions can be performed by either the company account or by any employee with company admin permissions enabled.

Suggestions:

- **Communicate with your Principal Contractor** – If you are going to unlink from your Principal Contractor or Unshare any of the shared employees, you should communicate this to the Principal Contractor **before** you proceed with these actions. At a minimum this is a courtesy so that they are aware of your intended actions. It may be that there are other elements within that company that have an upcoming need for your company's services and unlinking prematurely could complicate future work arrangements.
- **Unlink before Unsharing** – For best results, it's suggested that you unshare employees before unlinking the company.

Processes in this QRG:

- Unshare Employees – Via the Bulk Action feature
- Unshare Employees – Via the Unshare User Details page
- Unlink Companies – Via the Subcontractor page

CSMS Features

These are the 3 CSMS features that are available from the Contractors menu and are referred to in this guide:

1. **Contractor Page** – Bulk unsharing of Employees (available to subcontractors only)
2. **Subcontractor Page** – Unlinking Companies (available to subcontractors and principal contractors)
3. **Unshare User Details Page** – Individual unsharing of employees (available to subcontractors and principal contractors)

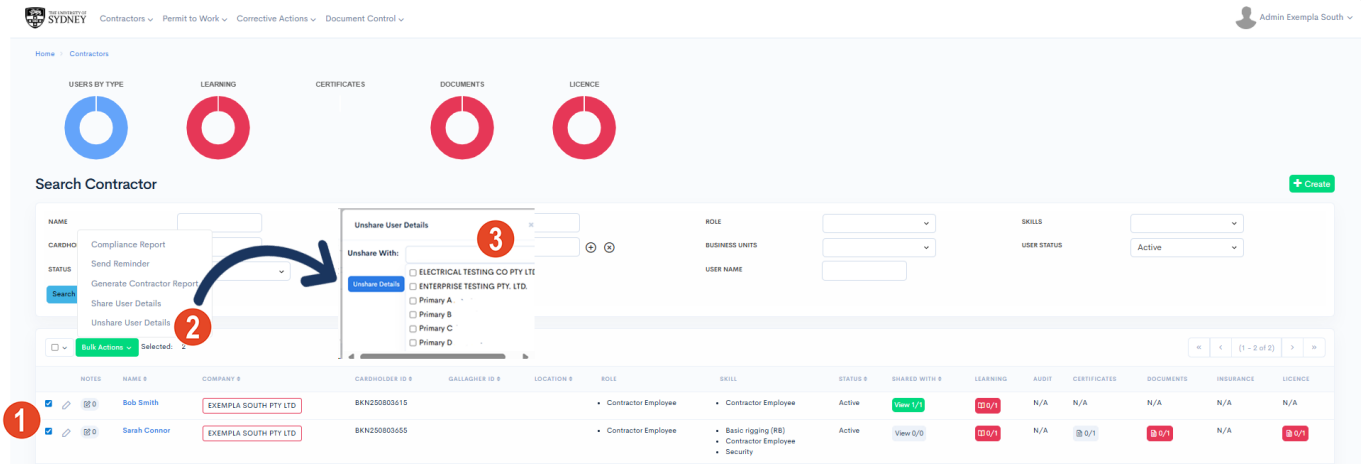
Unshare Employees – Via the Bulk Action feature

The use of this feature to unshare employees is only available to the company that's the subcontractor in the relationship.

In another QRG, the Bulk Action feature was demonstrated to share employees with a Principal Contractor. In this guide we demonstrate how this feature can be used to reverse that process – Unsharing employees.

This process can only be used effectively if the unsharing of employees occurs before the unlinking of the company. If you want to unshare employees after the link with the principal contractor has been severed, then you should use the alternative method (Unshare Employees – Via the Unshare User Details page).

To unshare employees, you will need to navigate to the **Contractor page** in the CSMS and set any filters that may be required to display the relevant employees:



1. **Tick all** the employees who you want to unshare from any of your linked companies.
2. Click **Bulk Actions** and then **Unshare User Details** from the available menu options.
3. In the pop-up window, use the dropdown menu to display the list of linked companies. **Tick all the Companies** from which you want to unshare the workers. Then select **Unshare Details** to complete the process.

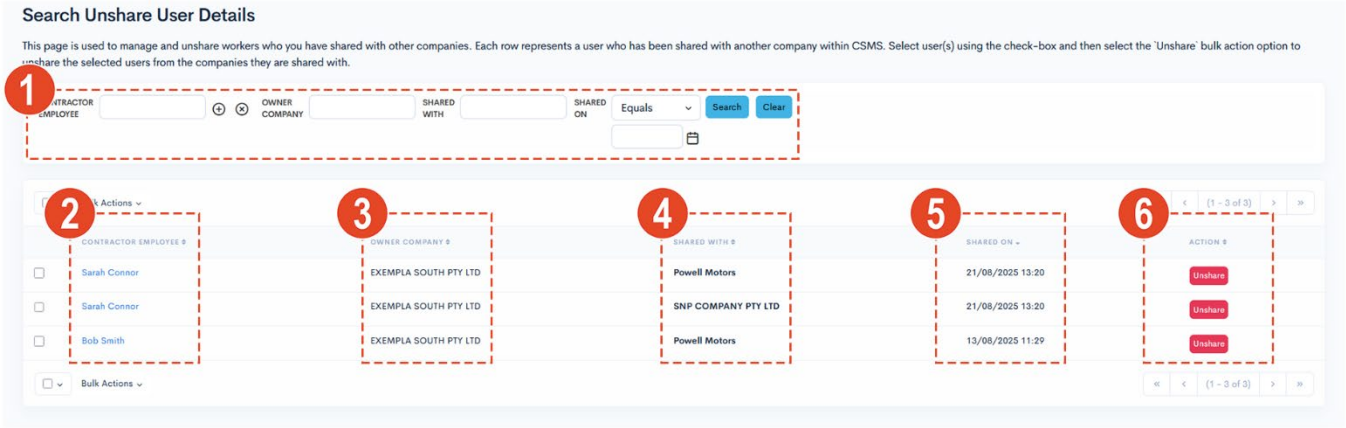
Note: This feature will display all companies that you are linked with, not just the companies that your selected employees have been shared with. If you have already unlinked a company, it will no longer appear on this list and the employees cannot be unshared via this method.

Unshare Employees – Via the Unshare User Details page

The use of this feature to unshare employees is available to both the subcontrator and principal contractor companies in the relationship.

This process can be used effectively even if the unsharing of employees occurs after the unlinking of the company.

To unshare employees, you will need to navigate to the **Unshare User Details** page in the CSMS:



1. Use the available **Filters** to locate specific employees, or employees that are shared with specific principal contractor companies.
2. **Contractor Employee field** – This is the name of the employee. Where an employee has been shared with multiple companies, they will appear multiple times on this list.
3. **Owner Company field** – The company that the employee works for is displayed here. When looking at this page from the subcontractor's perspective, all of your employees would show your company name in this column.
4. **Shared With field** – This column displays the company that the employee has been shared with (the principal contractor).
5. **Share Date field** – displays the date that the employee was shared with that company.
6. **Unshare action button** – selecting this button will unshare the employee and will remove it from this page

Note: You will be prompted to confirm the action after selecting the Unshare button.

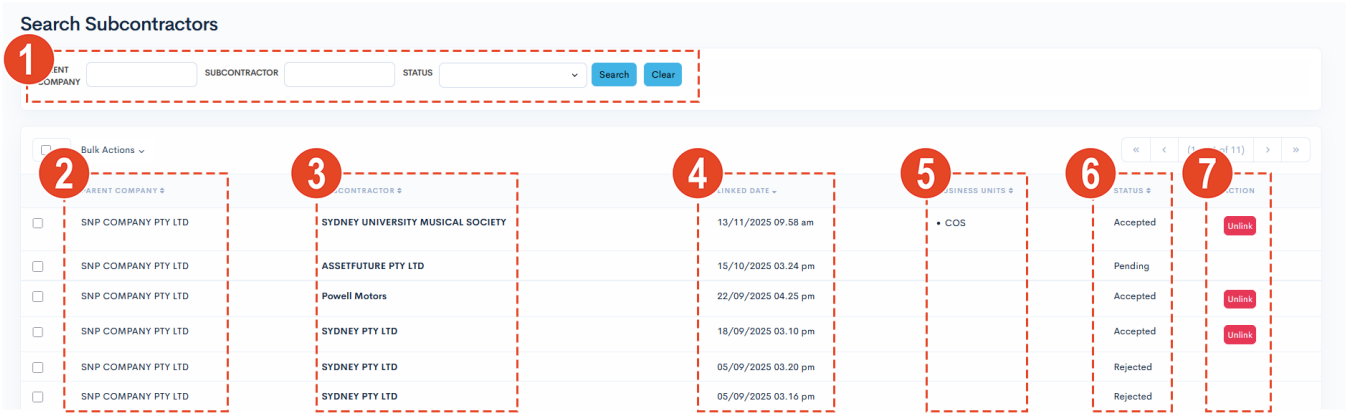
Note: you can unshare in bulk by selecting the tick box on the left of each record. This will enable the Bulk Actions button and will unshare everyone that you have selected.

Unlink Companies – Via the Subcontractor Page

As a rule, you should unshare employees before you unlink from a principal contractor company.

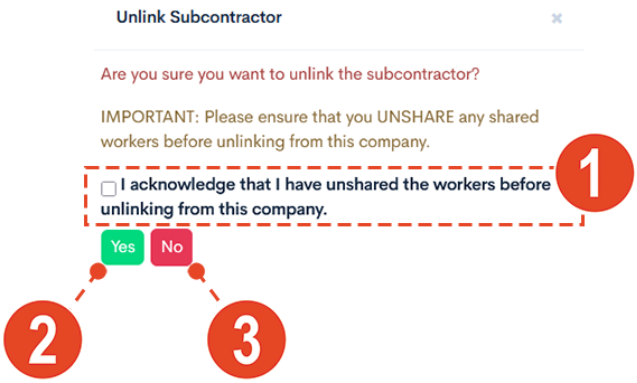
You should also notify the principal contractor that you intend to unlink from them before completing this action in the CSMS.

To unlink from a principal contractor company, you will need to navigate to the **Subcontractors** page in the CSMS, this page displays all of the companies that you have a relationship with:



1. Use the available filters to locate a specific principal contractor company, or companies that are in a specific status.
2. **Parent Company** field – In this column you would expect to see the companies that you are linked with as you are looking at this from the perspective of being the subcontractor. (You may also be a principal contractor in some relationships, in which case you would see your company name in this list for these relationships).
3. **Subcontractor field** – As you are the subcontractor, you would expect to see your company name in this list (unless you are a principal contractor for any of these relationships).
4. **Linked Date field** – Displays the date that the relationship commenced.
5. **Business Unit field** – Displays any of the business units that are applicable.
6. **Status field** – Displays the status of the subcontractor relationship: Pending, Rejected, Accepted. You can only unlink relationships that are "Accepted".
7. **Unlink action button – Selecting the red unlink button will initiate the process to sever the relationship with that principal contractor.**

Before the unlinking is completed, a pop-up window will appear, requesting confirmation of this action. It also includes a statement that you must unshare any affected employee profiles before unlinking from this company:



1. **Acknowledgement Statement** – you must put a tick in this box to proceed with the unlinking from this principal contractor company.
2. **Yes button** – selecting the Yes button will proceed with the unlinking.
3. **No button** – selecting the No button will cancel the unlinking request.

Note: If you unlink from a principal contractor company in error, you will need to contact them and ask them to send you a new request to link from within their CSMS account.