COS Quick Reference Guide

CSMS – Principal Contractor Company – Unshare employees and unlink from subcontractor companies

Introduction

The purpose of this Quick Reference Guide (QRG) is to provide instructions to principal contractor companies on how to unshare employees and unlink the relationship with subcontractor 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 sent a request to enter into a subcontract relationship with another company within the CSMS – this would be the subcontractor in your relationship.
- The subcontractor company will have subsequently shared some or all of their Employees with you, along with any other companies that are linked above you. (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 principal contractors. These actions can be performed by either the company account or by any employee account with company admin permissions enabled.

Suggestions:

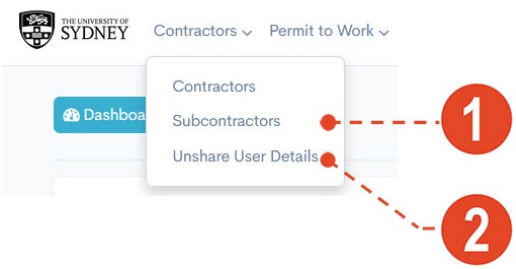
- **Communicate with your subcontractor** – If you are going to unlink from your subcontractor or unshare any of the shared employees, you should communicate this to the subcontractor **before** you proceed with these actions. At a minimum this is a courtesy so that they are aware of your intended actions. It may be that there are other elements within your company that have an upcoming need for the subcontractor'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 Unshare User Details page
- Unlink Companies – Via the Subcontractor page

CSMS Features

These are the 2 CSMS features that are available from the Contractors menu and are referred to in this guide:



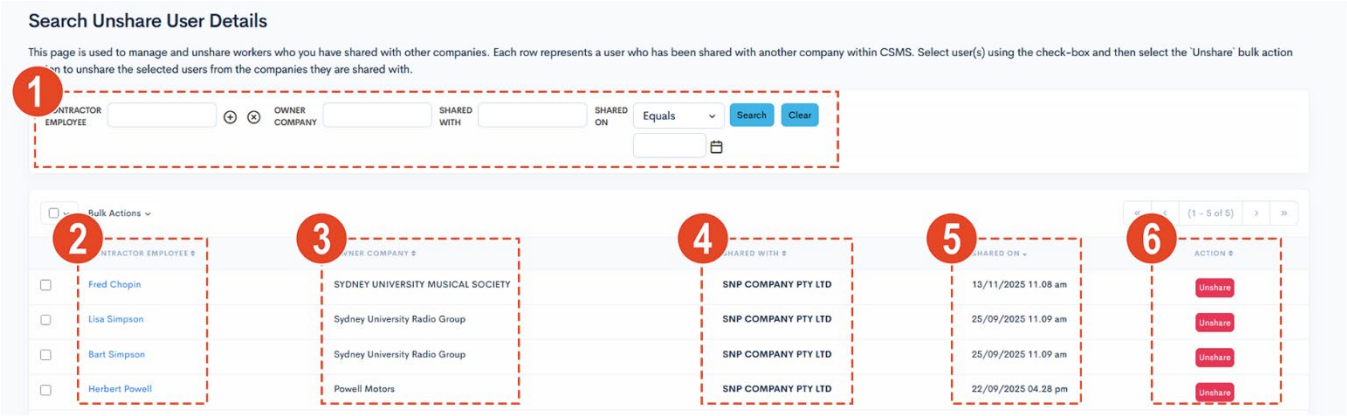
1. **Subcontractor Page** – Unlinking Companies (available to subcontractors and principal contractors)
2. **Unshare User Details Page** – Individual unsharing of employees (available to subcontractors and principal contractors)

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 by specific subcontractor 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 principal contractor's perspective, all of the employees would show the name of the subcontractor company in this column (unless you are also a subcontractor to someone else, in which case you would see the employees that you have shared with other companies too).
4. **Shared With field** – This column displays the company that the employee has been shared with. This would typically be your company name as you are the principal contractor in this relationship.
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.

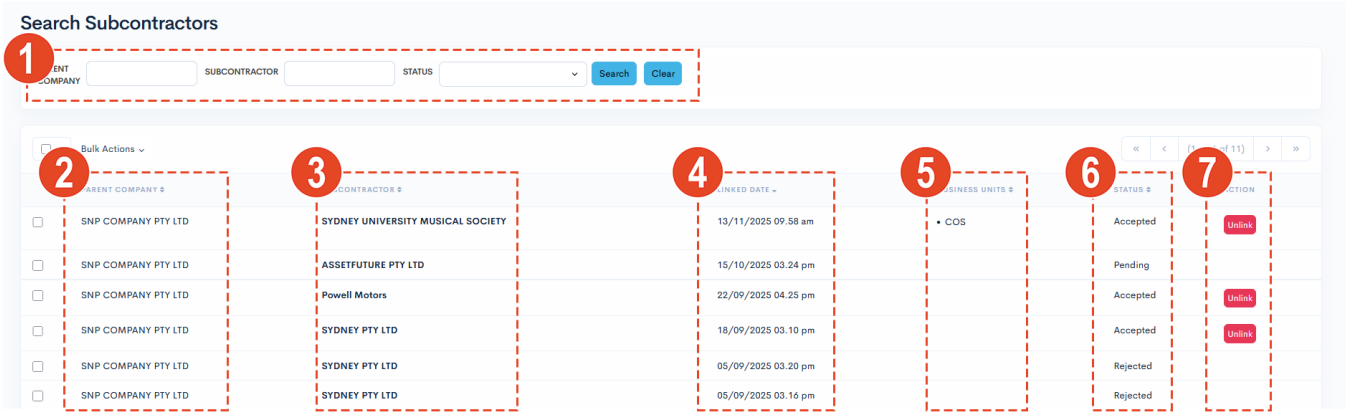
Note: you can unshare in bulk by selecting the tick box on the left of each record. This will enable the Bulk Actions button and will unshare everyone that you have selected.

Unlink Companies – Via the Subcontractor Page

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

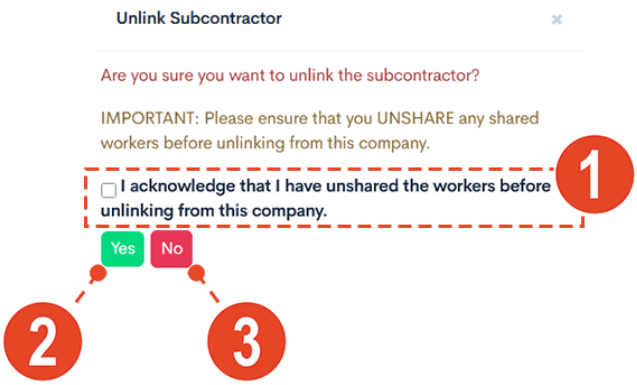
You should also notify the subcontractor that you intend to unlink from them before completing this action in the CSMS.

To unlink from a subcontractor 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 subcontractor company, or companies that are in a specific status.
2. **Parent Company** field – As you are the principal contractor, you would expect to see your company name in this list (unless you are a subcontractor for any of these relationships).
3. **Subcontractor 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 principal contractor. (You may also be a subcontractor in some relationships, in which case you would see your company name in this list for 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 subcontractor.**

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 subcontractor 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 subcontractor company in error, you will need to send them a new request to link with you. They would need to accept that link, and then check that any required employee profiles are shared with you.