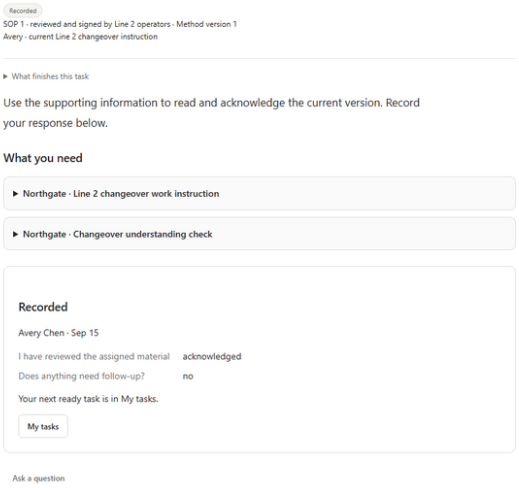
QUALIFY AND INDUCT A CONTRACTOR OR VISITOR

# Make site-approval decisions fit the work people will do

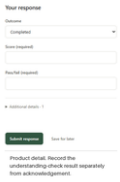
Review submitted qualifications against the selected contractor or visitor profile. Record approval, conditions or decline with the site, job scope and validity so the decision explains where the approval applies.

**Submit qualifications > Review and approve for site > Complete the site induction**

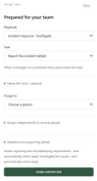
**SkillSmith · Keep the acknowledgement with the assigned instruction**




**SkillSmith · Record the understanding-check result separately**




**SkillSmith · Choose prepared work and its recipient — incident-response example**




Keep the acknowledgement with the assigned instruction

## Pay only when you see results

Agree the outcome for your first workflow with our team.

SELECTED CLIENTS FEATURED BY SKILLSMITH

verizon · KEYSIGHT TECHNOLOGIES · AMERICAN EAGLE · Berkeley UNIVERSITY OF CALIFORNIA

YOUR TEAM / THE DECISIONS THAT MATTER

# The people involved in the working method

Each role has a defined contribution. Your team selects the people responsible for those parts of the work.

| Your role | The contribution | SkillSmith support |
|---|---|---|
| **Assigned team member** | Submit qualifications; Complete the site induction | Respond with company: insurance, induction check passed, licences and programme - worker: trade licences. |
| **Designated specialist** | Review and approve for site | Respond with approved / conditions / declined, scope (site, job types) and valid until. |

## Identify the gap against this site's profile

In a worked example, a qualification is acceptable in another context but does not cover the selected site profile; record the gap before approval.

WORKED DECISION

| Decision point | Information to use | Responsible next step |
|---|---|---|
| Working material | Site rules | Open the selected material for this occurrence. |
| Recorded response | approved / conditions / declined, valid until and scope (site, job types) | Save the response with its work context. |
| Review point | valid until and scope (site, job types) | Agree the next action with the person responsible for this decision. |

Review the selected material, this occurrence's response and any conditional follow-up.

CONNECTED WORK / PREPARED PLAYBOOKS

# Qualify and induct a contractor or visitor

Bring site rules into the prepared work. Assigned team member and Designated specialist each receive the context needed for their part.

### 01 Submit qualifications

Record company: insurance, licences, safety record, programme - worker: trade licences and training certificates.

### 02 Review and approve for site

Record approved / conditions / declined, valid until and scope (site, job types).

### 03 Complete the site induction

Record site rules acknowledged, induction check passed and valid until.

## Prepare the useful part of the workflow

Use the prepared sequence with the resources and responsibilities selected for your team.

**Qualify and induct a contractor or visitor**

No contractor, agency worker or visitor works on site before the right profile is complete - a company's prequalification, a worker's credentials and induction, or a visitor's briefing - and it is renewed on time. Three profiles, one blueprint.

**Lighting contractor induction · Plant A**

YOUR INFORMATION / CONNECTED WORK

# The materials that make this method usable

Keep the relevant material available at the point it is used. The resource choices below support different parts of the work.

**Your work context > SkillSmith > Your next contribution**




| | |
|---|---|
| **Prequal**<br>The task uses this material | Contractor prequalification form with uploads (company profile) or the worker's credential list (worker profile). |
| **Site rules**<br>The task uses this material | The site rules / contractor handbook, or the visitor briefing. |
| **Induction check**<br>The task uses this material | Short induction quiz - required for the worker profile. |

YOUR DELIVERY PLAN / OUR TEAM

# Prepare the first useful playbook

Start with the materials and people you already have. We help make the setup choices explicit before your team uses the method.

### 01 Select the working material

Choose site rules from the resources your team uses.

### 02 Agree the responsibilities

Confirm assigned team member and designated specialist for this method, then choose the people eligible to receive its work.

### 03 Walk through the selected route

Choose the task, eligible recipients and deadline, then walk through the actual response fields.

## We are here to help



**Rohit Singh**
VP of Strategic Partnerships



**Brent Jackson**
Director of Customer Success

## Prepare the method for your team

### What stays with the recorded response?

The response for this occurrence retains approved / conditions / declined, valid until and scope (site, job types). It belongs to the work being reviewed, rather than replacing a different occurrence's record.

### Which materials do we need to bring?

Bring site rules. We use those choices to prepare the working context, then check that each task opens the material it needs.

### How do people receive the prepared work?

Select the prepared task and the relevant recipients when assigning work. Making a playbook available to a group and giving a person a task are separate setup choices.

### What is the outcome for the wider workflow?

Approved and inducted for the profile before the first shift, with a validity date; a declined qualification closes as declined.

WHY SKILLSMITH / YOUR NEXT STEP

# Bring your work; we help prepare the method

We work with your team to organize the source material, responsibilities and review choices. Start with one useful example, then carry the agreed method into everyday work.

| Without connected follow-through | With SkillSmith |
| --- | --- |
| **A completed entry is mistaken for the responsible person's decision.** | Give the designated specialist the recorded response and agreed criteria for this decision. |
| **People cannot see the method or evidence behind a decision.** | Make methods, responsibilities and decision evidence visible for review. |

## Walk through this method with us

Bring one real example and the material your team uses. We will walk through the task sequence and the decision that matters to you.

- Does the submitted evidence meet the selected contractor or visitor profile?
- The resource choices for this method
- Each responsible person's response
- The conditional route and wider outcome

Request a demo

skillsmith.com/contact