Creating a Contractor Profile

A customer must first complete the registration and setup of a customer account. A contractor profile may then be created. A customer can associate to one contractor company at a time. A contractor profile allows the account holder to apply for permits on behalf of their employer or clients.

*Only Right of Way (ROW) contractors require a licence (proof of insurance) at this time.*

There are two ways to create a contractor profile: – customers can 1) **Register as a New Contractor** or 2) **Associate to an Existing Contractor**. In this instance, contractor means contracting company.

**STEP 1. Navigate to My Contractor Profile Section**

From the customer dashboard menu bar open the **Profile** Page.
Customer Portal Series

At the bottom of the page, select the box marked “I am Associated with a Contractor.”

This will open a new section called ‘MY CONTRACTOR’ where the contractor profile information is managed.

Halifax
Registering a Contractor Account
STEP 2: OPTION 1 – Register as a New Contractor

This option is used by the first person to register a contractor profile for an organization. It will typically be the owner or manager of those responsible for applying for permits on behalf of the organization.

1. Click register as a new contract button.
2. Window open to collect contractor information: name of company / contact information etc.
3. Complete all required field in the form.
4. Save form when complete.

5. New window opens to confirm contractor information. If correct, select next.
6. A second window will open asking about business association. This feature is not currently configured and unrelated to contractor profile. Select next.

7. You will be returned to the landing page and see the following message:

![HALIFAX Welcome Page]

8. Your contractor profile is now active and you can manage the account from the ‘My Contractor’ section of your profile page.
   - Go to profile
   - Scroll to mycontractor section
   - Click on contractor icon to open your contractor profile management page
Contractor Profile Manager

Because you are the initial registrant of the contractor company you have been granted privileges under the role of Contractor Profile Manager (CPM). You will see two tabs in your contractor profile: Details Tab and Associated Accounts Tab.

1. In the Details Tab you can edit your contractor profile information such as contact info and mailing address.

    You can also manage the PIN for your organization. A PIN allows others to associate to the contractor account and apply for permits under the organization’s name.

    Contractors who associate to your company will not have access to manage the PIN unless they are given CPM rights.
2. In the Associated Accounts Tab, as the CPM you will see all associated contractors. Associated contractors can apply for permits under the name of your organization.

From this tab the current CPM can assign the CPM role to other associated contractors.

Example: In the example below, Doris is the CPM for Little Builder Inc. as designated by the manager checkbox.

John is an associated contractor who was provided a PIN and associated with Little Builders Inc and is now capable of applying for permits on behalf of little builders.

John can also be given CPM rights if Doris checks the manager box beside is name.
Customer Portal Series

STEP 2 Option 2: Associate to an Existing Contractor

This option is typically used by employees of an organization provide a PIN from the person who manages the company’s contractor profile.

1. To associate to an existing contractor (company) you must be provided a PIN by the CPM (person who manages the PIN).

2. Navigate to the ‘My Contractor’ section of the Profile Page within your Customer Portal account (see steps above).

3. Enter the PIN provided in the and click ‘Associate to Existing Contractor’.

4. Your new Contractor Association will show immediately under My Contractor section of your profile. You can now apply for permits as a contractor under that company name.
Customer Portal Series

Dissassociate a Contractor

An individual can only be associated with one contractor (company) at a time. Individuals can dissociate themselves, and CPM’s can dissociate contractors if required.

Individual Dissociates

If an individual wants to dissociate they must:
  1. Navigate to the ‘My Contractor’ section of the their Profile Page.
  2. Click the red X beside the contractor profile record

3. You will be prompted to confirm you want to continue to dissociate from the contractor.

4. The ‘My Contractor’ section will return to create a future contractor profile.
CPM Dissassociates

If an organization needs to remove a contractor association they must:
1. Inform the CPM
2. CPM navigates to ‘My Contractor’ profile - Associated Accounts Tab
3. Click the red X beside the contractor’s name
4. You will be prompted to confirm the dissassociation
5. In the Details Tab create a new PIN.
   a. This prevents the employee from re-associating and continuing the apply for permits as a contractor under the company’s name
   b. Existing associated contractors will not be impacted.
   c. New associated contractors will be provided the new PIN.
Customer Portal Series

Registering a Contractor Account