NetBenefit

Benefits Module Training

CONTRACTOR MANUAL

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Tracking local and Indigenous participation

Tracking local and Indigenous participation is a powerful way to show how efforts impact the community. This transparency builds trust, strengthens relationships and supports ongoing economic growth. By tracking workforce, spend, and community contributions, there is a focus on the positive change your work brings.

The NetBenefit Platform

Using a platform built with simplicity in mind, contractors are required to submit monthly reports. These reports will be submitted for approval in the following format:

- Workforce Report – This includes employees and training details.
- Spend Report – This includes subcontractor and community contributions.

Reporting Requirements

Workforce Requirements

Workforce Reports capture project-related labour activity during the **monthly reported period**. This information helps track local employment, workforce diversity, and training outcomes, ensuring projects deliver meaningful benefits to surrounding communities.

Workforce Reports are divided into **two core areas of reporting**:

1. Employee Information

This information helps tack who is working on the project and how employment opportunities are distributed.

Important Notes: Each employee must be reported using a unique Employee ID. Add each employee once and update their profile only if information changes. For example, update if a job position or union change occurs.

Reporting Requirements: Employee ID, Location, Gender, Job Position, Apprentice Year, Labour Union, Indigenous Affiliation, Minority Status, New Job Position Start Date

Workforce Requirements

2. Work Hours

This information helps measure total labour participation and workforce engagement on a project.

Important Notes: Report hours worked by employee during the reporting period.

Reporting Requirements: Employee ID, Hours

Spend Requirements

Spend Reports capture project-related labour activity during the **monthly reported period**. This information helps track local employment, workforce diversity, and training outcomes, ensuring projects deliver meaningful benefits to surrounding communities.

Spend Reports are divided into **two core areas of reporting**:

1. Manage Spend

Tracking spend helps measure how project procurement support local and Indigenous businesses.

Important Notes: Each spend record should reflect payment made to local and Indigenous businesses. New companies will be submitted for approval, but this will not prevent you from submitting your report.

Reporting Requirements: Company Name, Spend Date, Amount

New Companies: Company Name, Spend Date, Amount, Location, Business Category, Indigenous Affiliation, Indigenous Ownership, Local Indicator

Spend Requirements

2. Community Investment

Reporting community investment helps highlight positive social contributions made through the project.

Important Notes: Reporting community investment is optional but strongly encouraged.

Reporting Requirements: Organization Name, Location, Date, Contribution Amount, Investment Type, Investment Category, Indigenous Affiliation

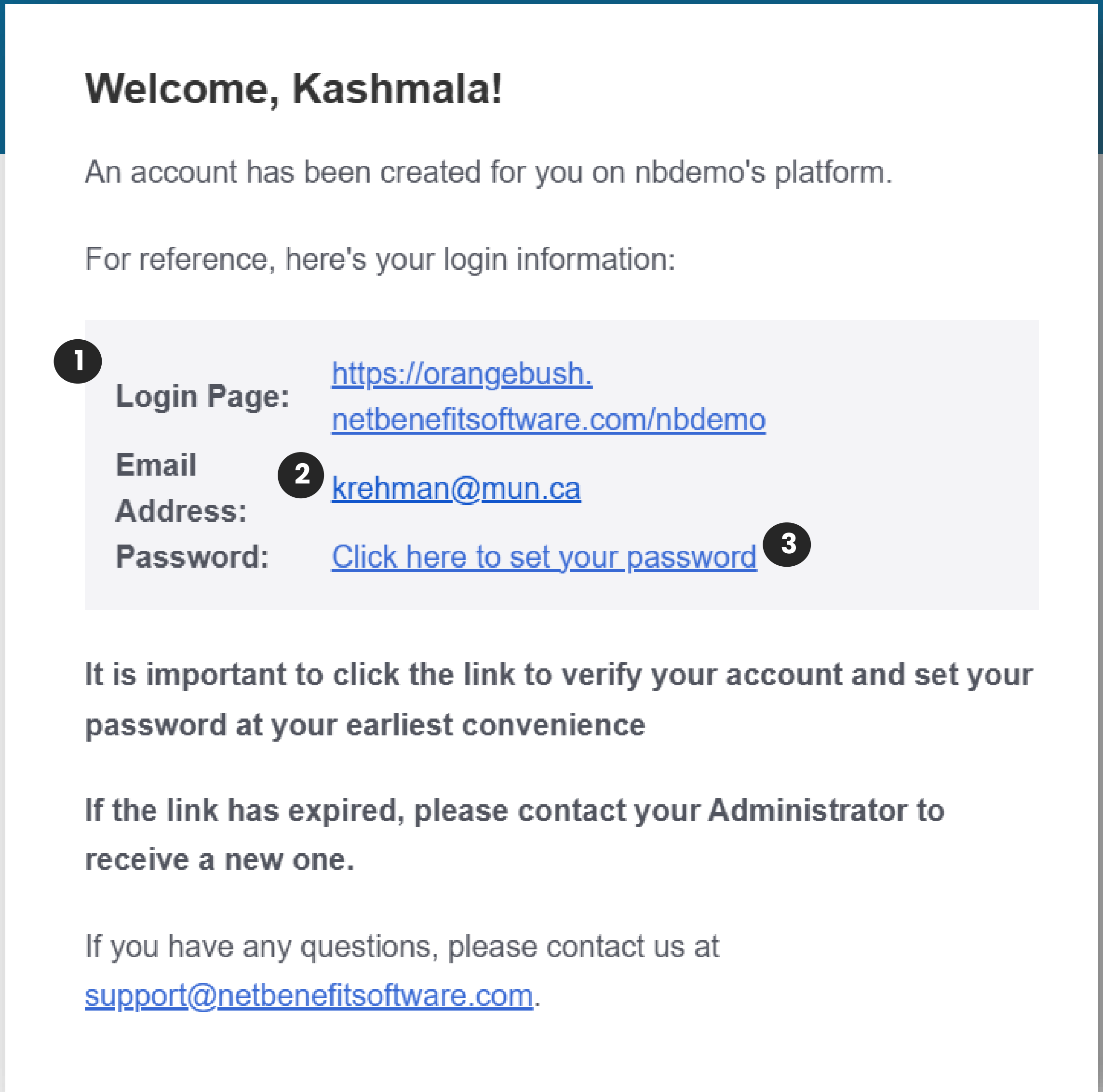
Account Setup & Platform Information

New Accounts

Each vendor is given access through a personalized company account. To get started, primary contacts will:

- Receive an email invitation
- Use the link in the email to set your personalized password
- Save user login details and bookmark home page

Never share your login credentials or password with anyone to ensure your account and company data remain secure. To create an additional account, please contact your administrator.



Welcome, Kashmala!

An account has been created for you on nbdemo's platform.

For reference, here's your login information:

1	**Login Page:**	https://orangebush.netbenefitsoftware.com/nbdemo
2	**Email Address:**	krehman@mun.ca
3	**Password:**	Click here to set your password

It is important to click the link to verify your account and set your password at your earliest convenience

If the link has expired, please contact your Administrator to receive a new one.

If you have any questions, please contact us at support@netbenefitsoftware.com.

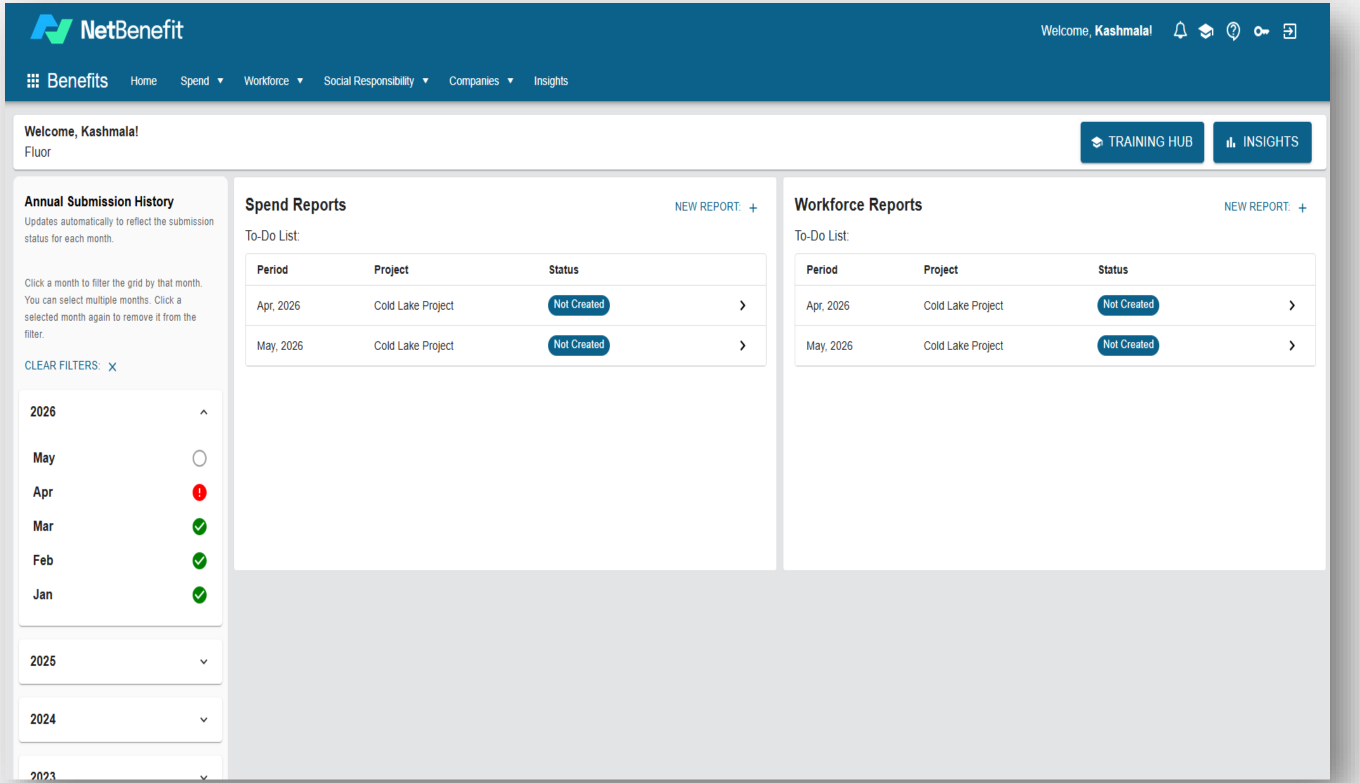
General Navigation

General Navigation

- Use the top menu to move quickly between platform areas.
- Use the right-hand icons to access platform settings and tools.

Homepage

- On the home page, view the status of monthly reports for each project.
- Use the month filter to review a specific reporting period.
- Click an outstanding report to begin or select New Report.



Workforce Report

Workforce: Monthly Report Submission

Step 1: Create New Report
Select the project and reporting month to begin your report.

Step 2: Manage Employees
Add new employee profile or update existing employee information if needed.

Step 3: Add Work Hours
Report on on-site and off-site hours worked by each employee during the reporting period.

Step 5: Employees Needing Review
Review any employees flagged for verification or correction.

Step 6: Review & Submit
Review all information is accurate and submit the report.

Workforce: Best Practices

Use Employee IDs

Always report employees using a unique Employee ID. Do not use employee names in reporting fields.

Collect Workforce Diversity

Collect workforce diversity information at the time of hire. Collecting this information early helps ensure accurate reporting throughout the project while building trust and transparency. Employees should understand that this information is used only to report on workforce representation and inclusion outcomes.

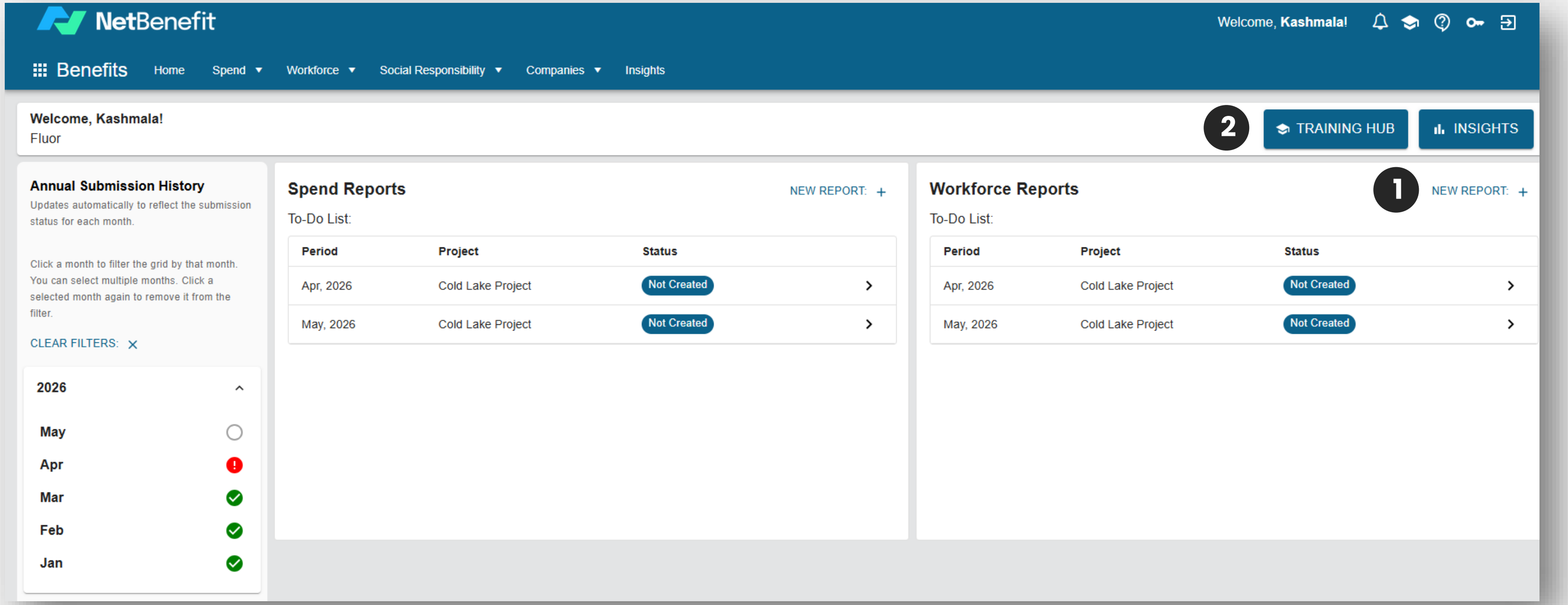
Use Your HR System as The Source

Use your internal HR or payroll system when possible. This helps ensure job positions, gender, work location, and onsite or offsite hours are reported accurately.
Pro Tip: Work with HR to setup a monthly export can help streamline your reporting workflow.

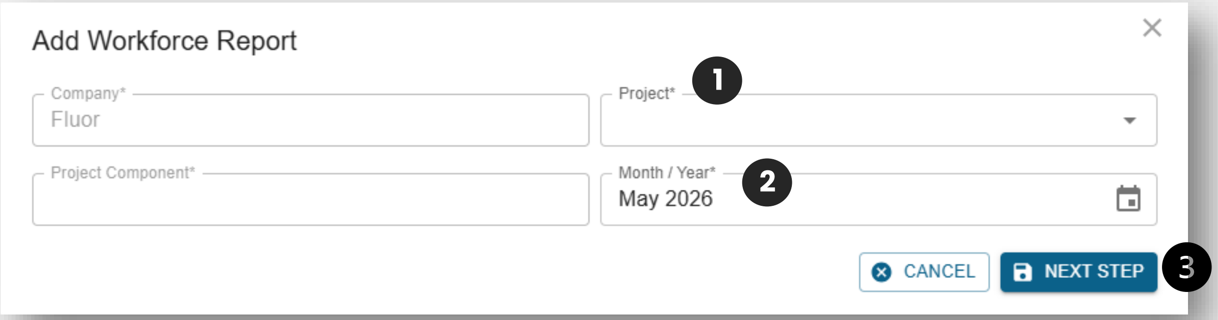
Creating a New Workforce Report

Once logged in, you'll be taken to the landing page, your starting point for creating a Workforce Report.

1. **Click the New Report button to begin creating your monthly submission.**
2. As a reminder, if you would prefer to see videos or click-throughs for training, you can always visit our training hub:



Step 1: Create New Report

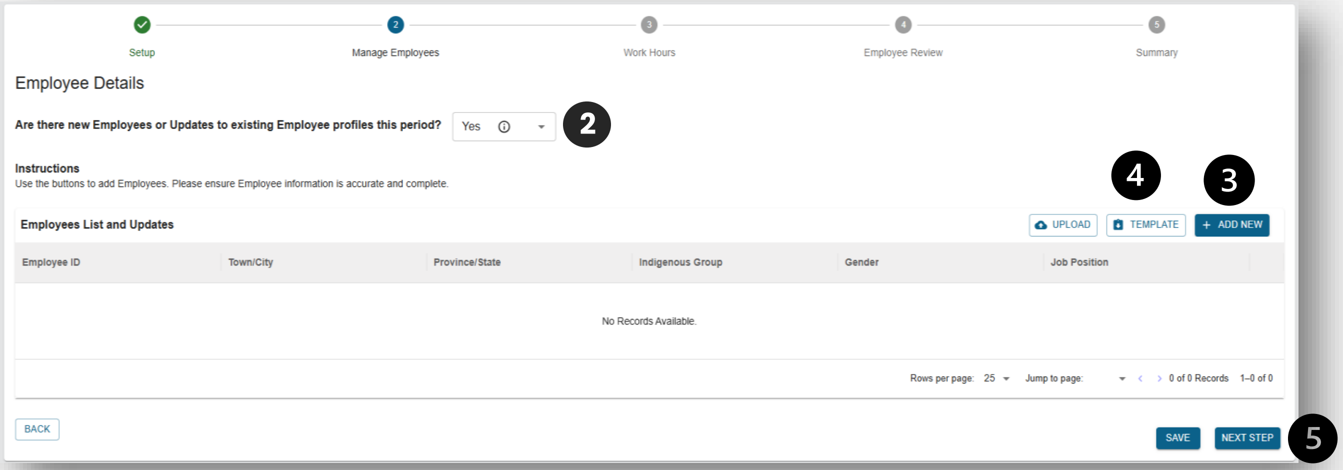


1. Select the Project for this report. The Project Component will be automatically set based on the current project phase.

2. Select the Month/Year.

3. Click Next Step to continue.

Step 2: Manage Employees



1. Add new or update employee profiles such as job changes. For job changes, please include the new position start date.

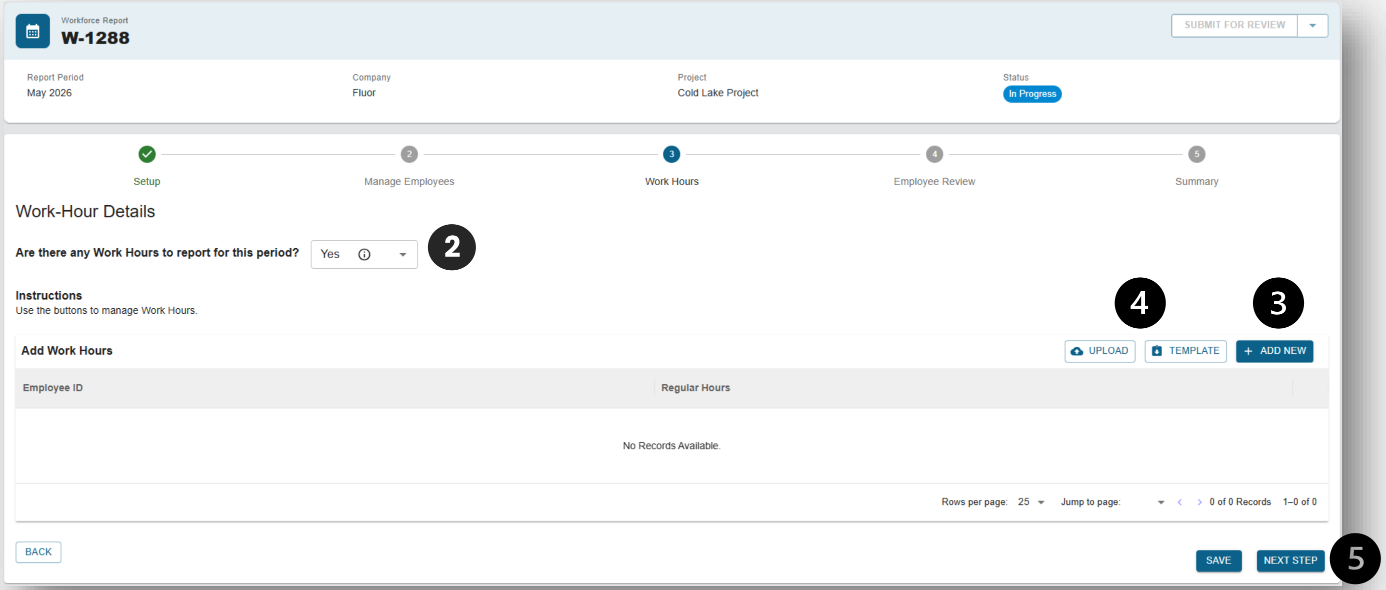
2. Select No if you have no new or updates employees to report.

3. Click Add New to create a new record.

4. To upload multiple records:
   - Download the latest version of the template
   - Complete the required fields and correct any validation errors
   - Upload the file

5. Click Next Step to continue.

Step 3: Add Work Hours



1. Report all on-site and off-site hours worked by each employee during the reporting period.

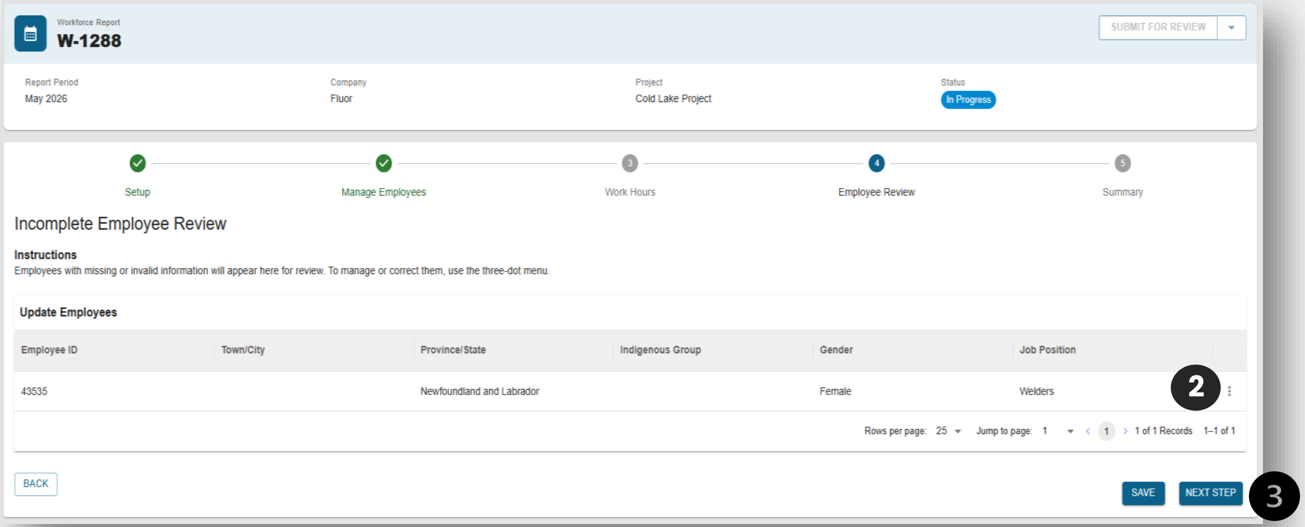
2. Select No if you have no work hours to report.

3. Click Add New and select the Employee ID to create a new record.

4. To upload multiple records:
   - Download the latest version of the template
   - Complete the required fields and correct any validation errors
   - Upload the file

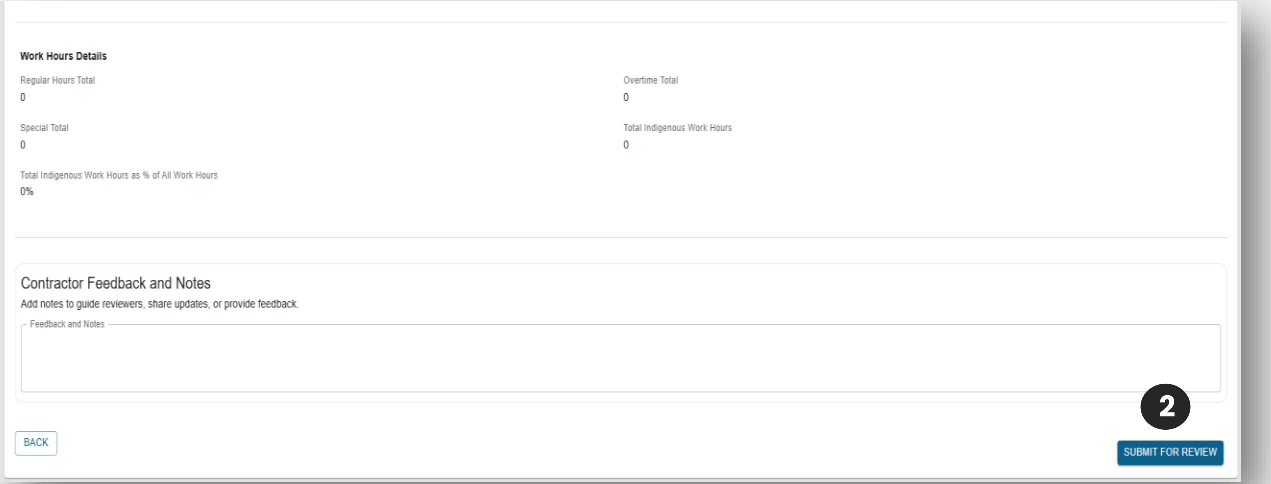
5. Click Next Step to continue.

Step 5: Employees Needing Review



1. Each employee listed requires an action.
2. Click the menu (⋮) to add or update employee profile to match platform requirements.
3. Click Next Step to continue.

Step 6: Review & Submit



1. Review summary and ensure accuracy.

2. Click Submit to complete.

3. All submitted reports will be reviewed by an administrator.
   - The report will be marked as **Complete** when approved.
   - The report will be marked as **Referred Back** if corrections are required.
   - Users will receive a notification by email and on the platform home page.

Spend Reports

Monthly Spend Report Submission

Step 1: Create New Report
Select the project and reporting month to begin your report.

Step 2: Manage Spend
Add expenditures made during the reporting period.

Step 3: Review & Submit
Review all information is accurate and submit the report.

Spend: Best Practices

Use Consistent Company/Vendor Information

Record vendor names and details consistently across reporting periods to prevent duplicate companies and maintain accurate tracking of spend.

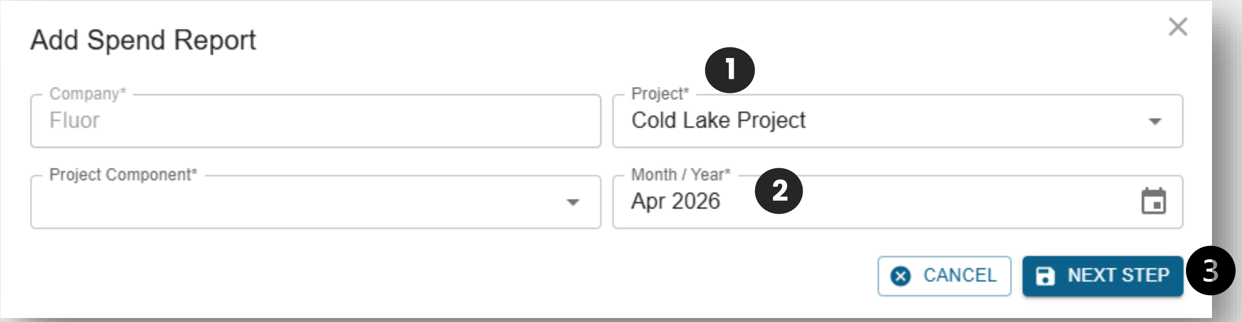
Diversity Metrics

Gather diversity metrics when onboarding new vendors. Collecting this information will ensure it's available when reporting project spend.

Use Your Accounting Systems as a Source of Truth

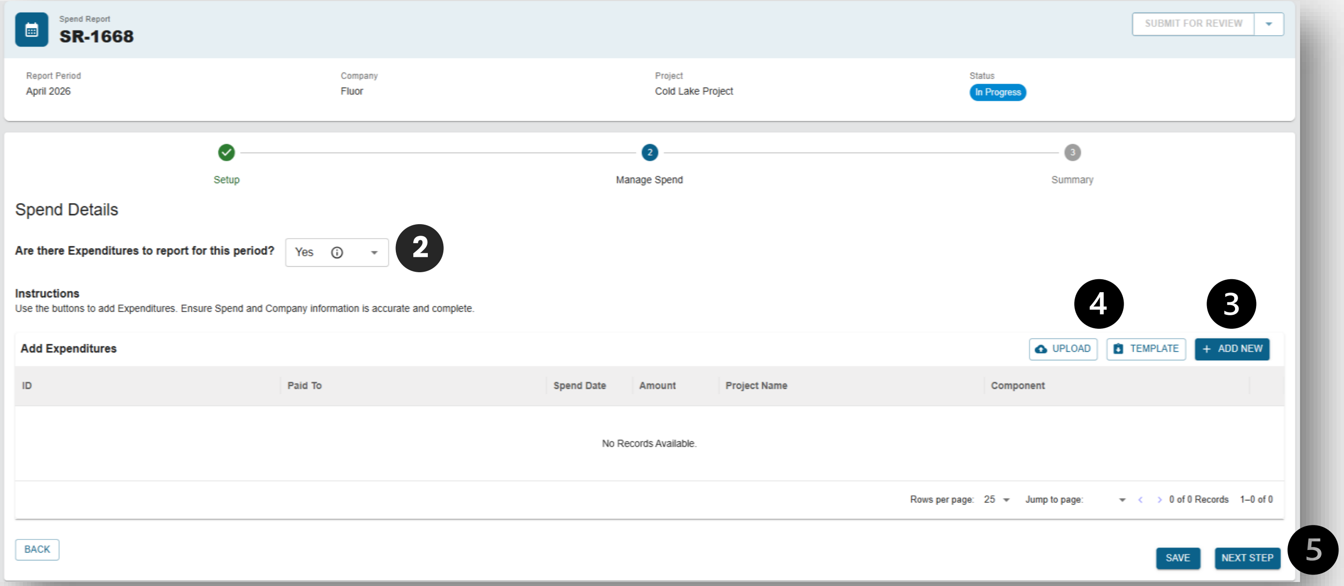
Use your procurement or accounting tools as the source of truth when preparing spend reports.
Pro Tip: Setting up a monthly export can help streamline your reporting workflow.

Step 1: Create New Report



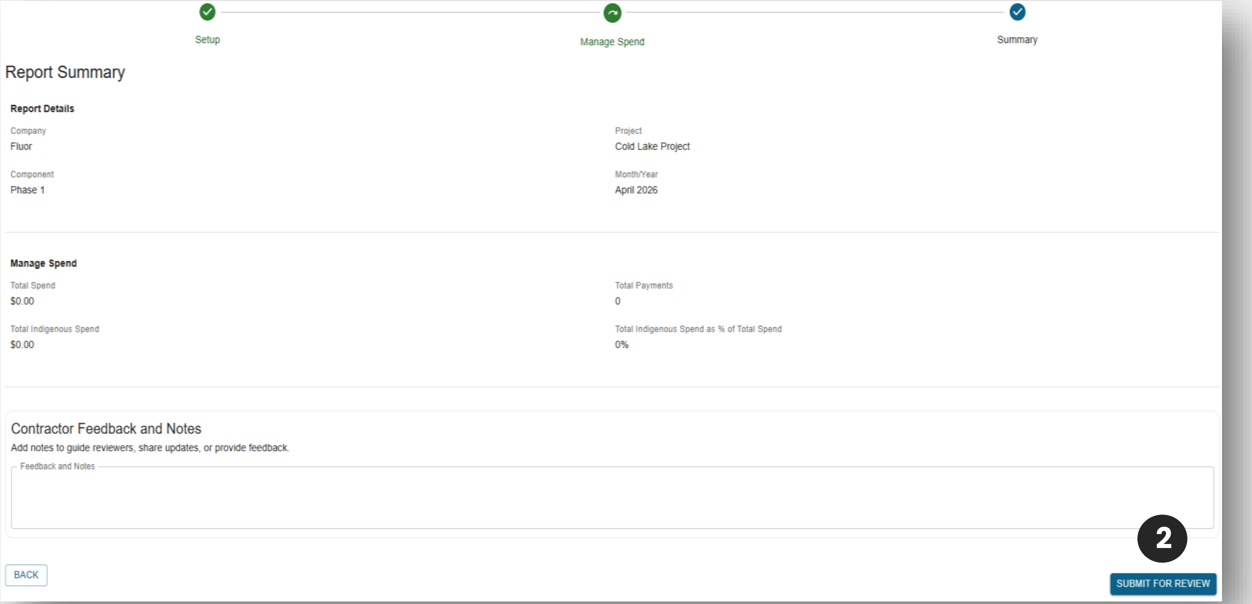
1. Select the Project and Project Component for this report.
2. Select the Month/Year.
3. Click Create Spend Report to continue.

Step 2: Manage Spend



1. All local and Indigenous spend must be reported on for the selected project and reporting period.
2. Select No if you have no spend to report.
3. Click Add New to create a new record.
4. To upload multiple records:
   - Download the latest version of the template
   - Complete the required fields and correct any validation errors
   - Upload the file
5. Click Next Step to continue.

Step 3: Review & Submit



1. Review summary and ensure accuracy.

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3. All submitted reports will be reviewed by an administrator.
   - The report will be marked as Complete when approved.
   - The report will be marked as Referred Back if corrections are required
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FAQs

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How do I add a new user to the platform?

To create a new user account, contact your system administrator. For security reasons, do not share your login credentials or account with others.

When are reports due?

Workforce and Spend reports should be submitted within 15 days after the end of each reporting month.

Can I save a report and finish it later?

Yes. Reports can be saved as drafts and updated as additional information becomes available before final submission.

What happens if I add a new company/vendor spend activity?

New companies will be reviewed and approved by an administrator. This will not prevent you from submitting your report, but the company must be approved before the report is approved.

FAQs

Why should I select 'No' when there's nothing to report?

Selecting 'No' confirms that you have reviewed the reporting period and that there are no related records to report. This allows the report to be marked as complete for that section and ensures the reporting period is accurately recorded rather than left incomplete.

Which templates should I use?

Use the platform templates available in the report areas. Make sure a new template is downloaded during each report submission.

What happens if my report is referred back?

If updates are required, the report will be marked Referred Back. You will receive a notification by email and on the platform home page. Review the feedback, make the required updates, and resubmit the report.

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