

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 track 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>
Email Address: **2** krehman@mun.ca
Password: [Click here to set your password](#) **3**

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.

The screenshot displays the NetBenefit software interface. At the top, a dark blue header contains the NetBenefit logo, a navigation menu with links like 'Benefits', 'Home', 'Spend', 'Workforce', 'Social Responsibility', 'Companies', and 'Insights', and a user greeting 'Welcome, Kashmala!'. Below the header, a secondary bar shows 'Welcome, Kashmala! Fluor' and buttons for 'TRAINING HUB' and 'INSIGHTS'. The main content area is divided into three columns. The left column, 'Annual Submission History', includes a filter for the month of 2026 (May, Apr, Mar, Feb, Jan) and a 'CLEAR FILTERS' link. The middle column, 'Spend Reports', shows a 'To-Do List' table with columns for Period, Project, and Status. The right column, 'Workforce Reports', also shows a 'To-Do List' table with the same columns. Both tables list 'Apr, 2026' and 'May, 2026' for the 'Cold Lake Project', with a 'Not Created' status and a right arrow icon.

Period	Project	Status
Apr, 2026	Cold Lake Project	Not Created
May, 2026	Cold Lake Project	Not Created

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.

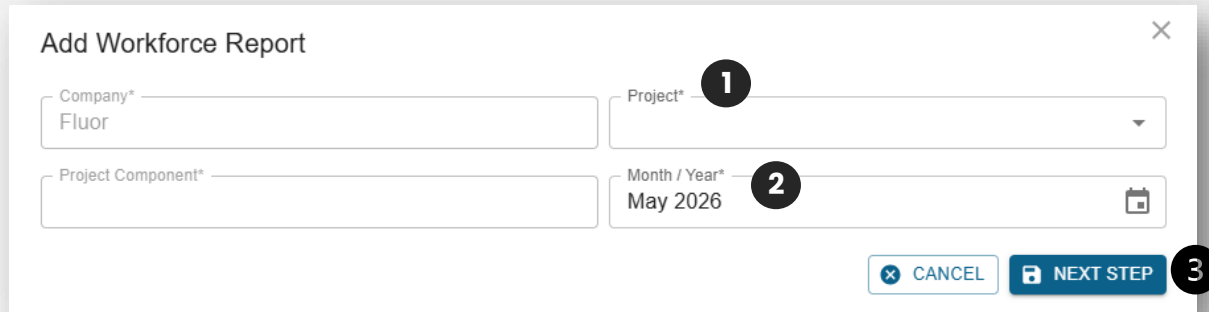
1. Click the New Report button to begin creating your monthly submission.
2. As a reminder, if you would prefer to see videos or click-throughs for training, you can always visit our training hub:

The screenshot displays the NetBenefit software interface. The top navigation bar includes the NetBenefit logo and user information: "Welcome, Kashmala!". Below the navigation bar, there are tabs for "Benefits", "Home", "Spend", "Workforce", "Social Responsibility", "Companies", and "Insights". The main content area is divided into three sections:

- Annual Submission History:** This section on the left provides information about submission status for each month. It includes a "CLEAR FILTERS" button and a list of months from 2026 to Jan, with status indicators (e.g., "Not Created", "Not Created", "Not Created", "Not Created", "Not Created").
- Spend Reports:** This section in the middle shows a "To-Do List" table with columns for "Period", "Project", and "Status". The table lists two entries for "Cold Lake Project" for "Apr, 2026" and "May, 2026", both with a "Not Created" status.
- Workforce Reports:** This section on the right also shows a "To-Do List" table with columns for "Period", "Project", and "Status". It lists two entries for "Cold Lake Project" for "Apr, 2026" and "May, 2026", both with a "Not Created" status. A "NEW REPORT" button with a "+" icon is located in the top right corner of this section, marked with a circled "1".

Additional UI elements include a "TRAINING HUB" button in the top right corner, marked with a circled "2", and a "WELCOME, KASHMALA!" message in the top left of the main content area.

Step 1: Create New Report



The screenshot shows a dialog box titled "Add Workforce Report" with a close button (X) in the top right corner. The dialog contains four input fields arranged in a 2x2 grid:

- Company***: A text input field containing the value "Fluor".
- Project***: A dropdown menu with a downward arrow icon. A black circle with the number "1" is positioned above the field.
- Project Component***: An empty text input field.
- Month / Year***: A date input field containing the value "May 2026" and a calendar icon. A black circle with the number "2" is positioned above the field.

At the bottom right of the dialog are two buttons:

- CANCEL**: A light blue button with a close icon (X) on the left.
- NEXT STEP**: A dark blue button with a save icon (floppy disk) on the left. A black circle with the number "3" is positioned above the button.

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

The screenshot shows the 'Manage Employees' step in a five-part process. At the top, a progress bar indicates the current step. Below it, the 'Employee Details' section contains a question: 'Are there new Employees or Updates to existing Employee profiles this period?' with a dropdown menu set to 'Yes' and a circular callout '2' next to it. An 'Instructions' section follows, advising to use buttons to add employees. The 'Employees List and Updates' section features a table with columns: Employee ID, Town/City, Province/State, Indigenous Group, Gender, and Job Position. The table is currently empty, showing 'No Records Available'. To the right of the table are buttons for 'UPLOAD', 'TEMPLATE', and '+ ADD NEW', with callouts '4' and '3' respectively. At the bottom right, there are 'SAVE' and 'NEXT STEP' buttons, with callout '5' next to 'NEXT STEP'. A 'BACK' button is located at the bottom left.

Employee ID	Town/City	Province/State	Indigenous Group	Gender	Job Position
No Records Available.					

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

Workflow Report
W-1288 SUBMIT FOR REVIEW

Report Period: May 2025 Company: Fluor Project: Cold Lake Project Status: In Progress

Setup ✓ Manage Employees ✓ Work Hours 3 **Employee Review 4** Summary 5

Incomplete Employee Review

Instructions
Employees with missing or invalid information will appear here for review. To manage or correct them, use the three-dot menu.

Update Employees

Employee ID	Town/City	Province/State	Indigenous Group	Gender	Job Position	
43535		Newfoundland and Labrador		Female	Welders	2

Rows per page: 25 Jump to page: 1 1 of 1 Records 1-1 of 1

BACK SAVE NEXT STEP 3

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

Work Hours Details

Regular Hours Total 0	Overtime Total 0
Special Total 0	Total Indigenous Work Hours 0
Total Indigenous Work Hours as % of All Work Hours 0%	

Contractor Feedback and Notes
Add notes to guide reviewers, share updates, or provide feedback.

Feedback and Notes

2

BACK SUBMIT FOR REVIEW

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

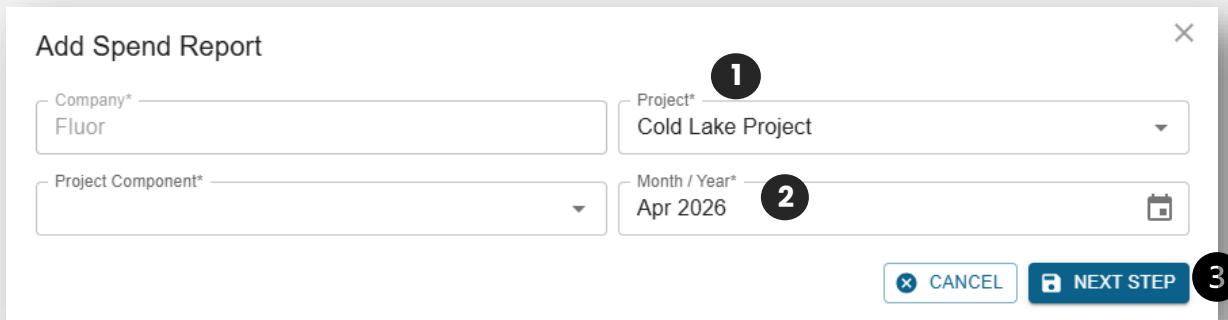
Gather diversity metrics when onboarding new vendors. Collecting this information will ensure it's available when reporting project spend.

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



The screenshot shows a dialog box titled "Add Spend Report" with a close button (X) in the top right corner. The dialog contains four input fields arranged in a 2x2 grid. The top-left field is labeled "Company*" and contains the text "Fluor". The top-right field is labeled "Project*" and contains a dropdown menu with "Cold Lake Project" selected; a black circle with the number "1" is positioned above this field. The bottom-left field is labeled "Project Component*" and contains a dropdown menu with a downward arrow. The bottom-right field is labeled "Month / Year*" and contains the text "Apr 2026"; a black circle with the number "2" is positioned above this field, and a calendar icon is visible to its right. At the bottom of the dialog are two buttons: a light blue "CANCEL" button with a close icon (X) and a dark blue "NEXT STEP" button with a right arrow icon. A black circle with the number "3" is positioned to the right of the "NEXT STEP" button.

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

Spend Report SR-1668

Report Period: April 2026 | Company: Fluor | Project: Cold Lake Project | Status: In Progress

Setup (1) | **Manage Spend (2)** | Summary (3)

Spend Details

Are there Expenditures to report for this period? Yes (1) (2)

Instructions
Use the buttons to add Expenditures. Ensure Spend and Company information is accurate and complete.

Add Expenditures

UPLOAD (4) | TEMPLATE | + ADD NEW (3)

ID	Paid To	Spend Date	Amount	Project Name	Component
No Records Available.					

Rows per page: 25 | Jump to page: 0 of 0 Records | 1-0 of 0

BACK | SAVE | NEXT STEP (5)

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

Report Summary

Report Details

Company
Fluor

Project
Cold Lake Project

Component
Phase 1

Month/Year
April 2026

Manage Spend

Total Spend
\$0.00

Total Payments
0

Total Indigenous Spend
\$0.00

Total Indigenous Spend as % of Total Spend
0%

Contractor Feedback and Notes

Add notes to guide reviewers, share updates, or provide feedback.

Feedback and Notes

BACK

SUBMIT FOR REVIEW

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.

FAQs

FAQs

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.

Benefits Module Training

CONTRACTOR MANUAL