

Create and Maintain Contractor Individual Profiles

This one-point lesson describes how **Contractor Principal Contacts** can create (page 1) and update (page 2) their employee profiles in the [Cority](#) Contractor Safety Management system.

Create a new Contractor Individual profile


1 From the **Contractors** landing page, click the **Contractor ID** to go to your Entity record.


2 From the Entity record, click the **Individual Contractors** tab.

3 To create a new Contractor Individual profile, click **New**.

4 Read the instructions before completing the **Contractor Employee Details**:

- **First Name**
- **Last Name**
- **Phone Number**
- **LMS Contractor Type** – select Service Contractor if not already selected
- **Email** – must be unique in the system

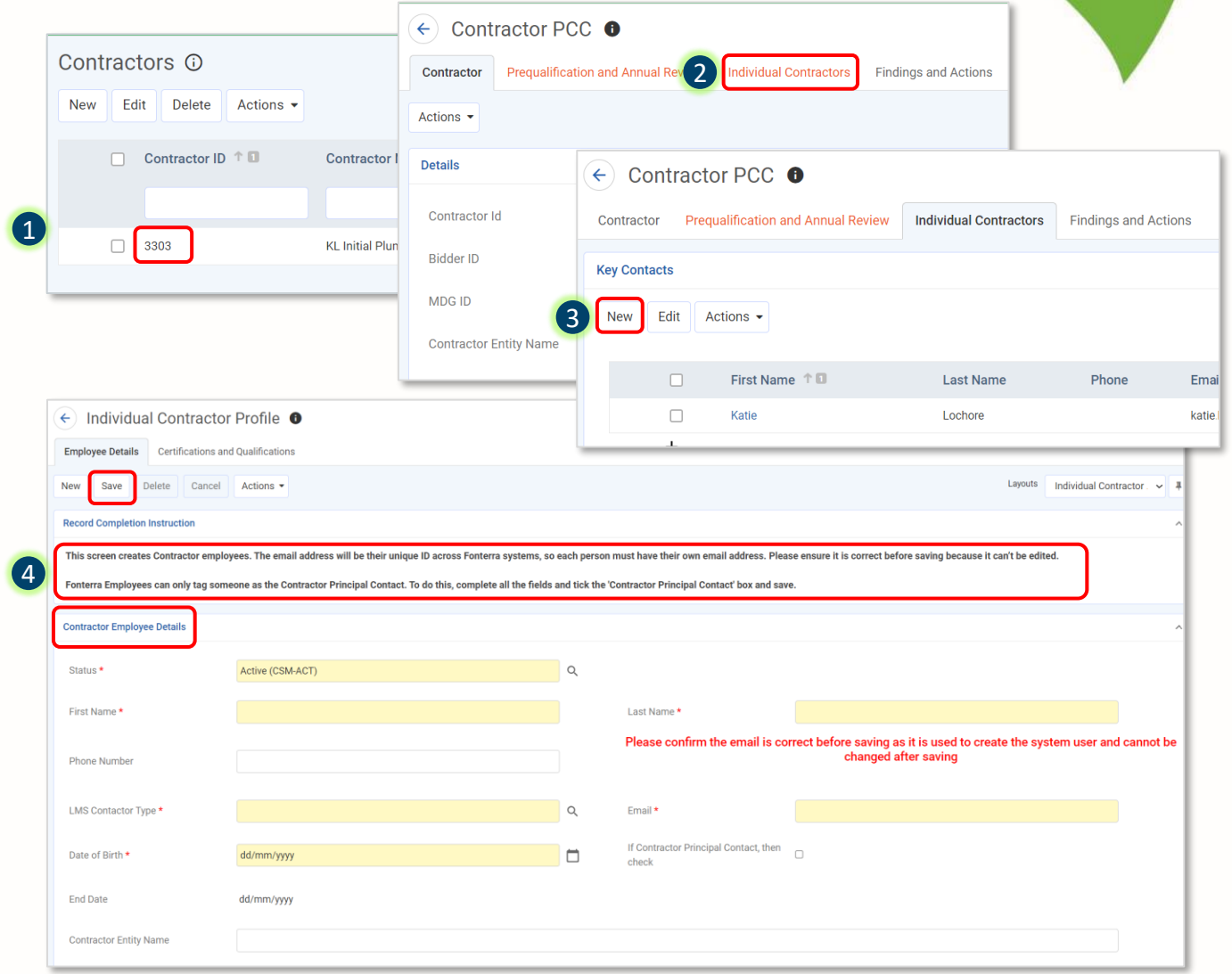
 The Individual's email address is their unique ID in the system. Please ensure it is correct before saving because it cannot be edited.

 Contact your Fonterra Principal Contact if a contractor's email already exists in the system because they previously worked for another entity.

Click **Save**.

5 A notification email displays on the screen. Click **Send**. This sends an introductory email to the Contractor Individual so they can log into myCority.

 Go to [Contractor Safety Management Help](#) to view the one point lesson Upload Contractor Certificates and Qualifications for Contractors



The screenshot shows the system interface with numbered callouts 1 through 5 corresponding to the instructions. Callout 1 points to the 'Contractors' landing page with a 'New' button. Callout 2 points to the 'Individual Contractors' tab in the 'Contractor PCC' view. Callout 3 points to the 'New' button in the 'Key Contacts' section. Callout 4 points to a red-bordered box containing instructions: 'This screen creates Contractor employees. The email address will be their unique ID across Fonterra systems, so each person must have their own email address. Please ensure it is correct before saving because it can't be edited. Fonterra Employees can only tag someone as the Contractor Principal Contact. To do this, complete all the fields and tick the 'Contractor Principal Contact' box and save.' Below this, the 'Contractor Employee Details' form is visible with fields for Status, First Name, Last Name, Phone Number, LMS Contractor Type, Date of Birth, End Date, and Contractor Entity Name. A red warning message is displayed: 'Please confirm the email is correct before saving as it is used to create the system user and cannot be changed after saving'.

Create and Maintain Contractor Individual Profiles

This one-point lesson describes how **Contractor Principal Contacts** can create (page 1) and update (page 2) their employee profiles in the [Cority](#) Contractor Safety Management system.

Update a Contractor Individual profile

1 From the **Contractors** landing page, click the **Contractor ID** to go to your Entity record.

2 From the Entity record, click the **Individual Contractors** tab. Select the Contractor from the list by clicking their **First Name**.

3 Update the **Contractor Employee Details**, as required:

- **First Name**
- **Last Name**
- **Phone Number**
- **LMS Contractor Type** - select Service Contractors if not already selected

Click **Save**.


4 If a Contractor's email is changing:

- Update their **Status** - Click the search icon and select **Inactive**
- Create a new profile with their new email address and copy across their details
- Contact contractorsafetymanagement@fonterra.com and ask for the two profiles to be merged in LMS.

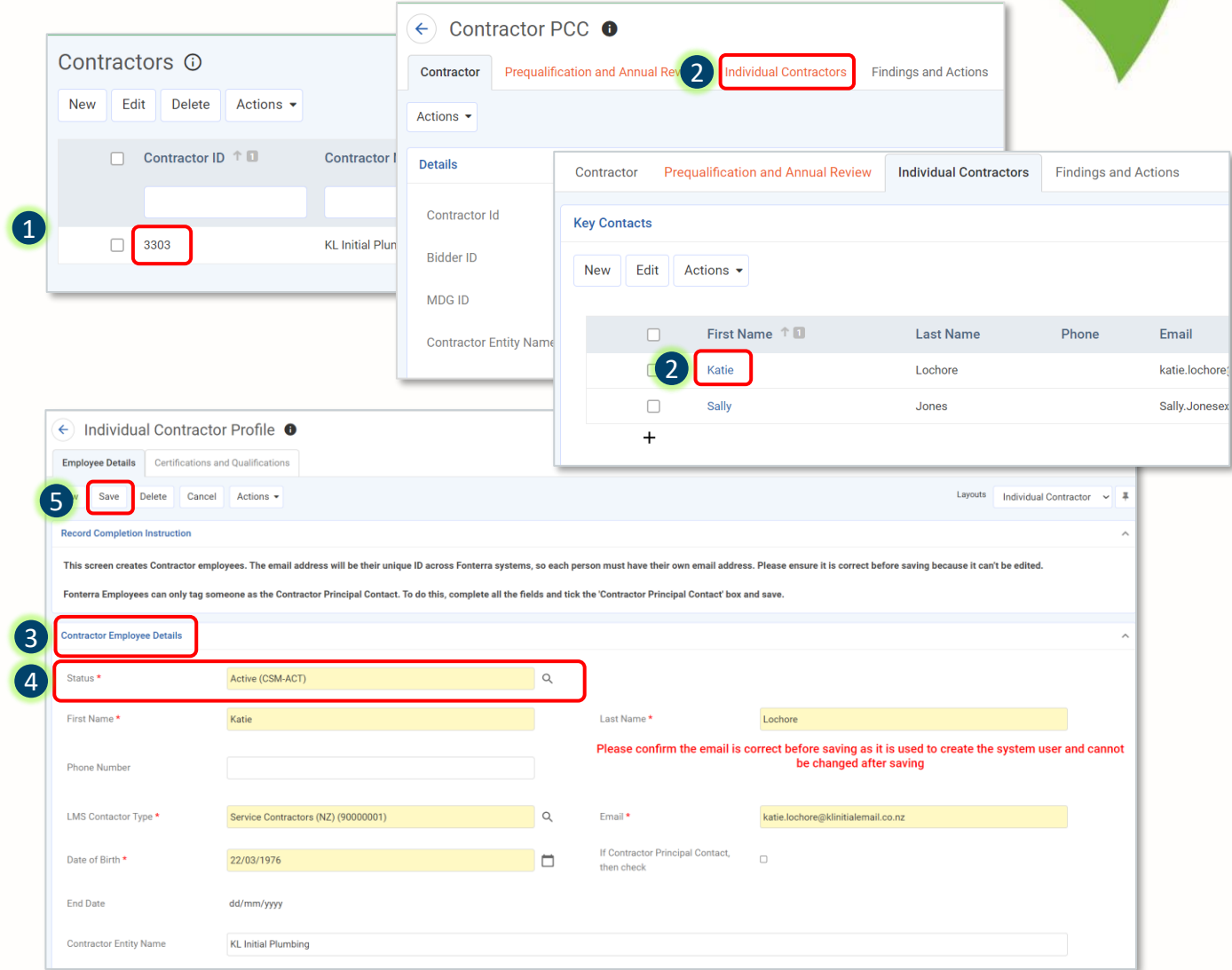
If a Contractor no longer works for your entity:

- Update their **Status** to **Inactive**.

5 Click **Save**.

 Contact your Fonterra Principal Contact if:

- A Contractor is moving to another entity that works on Fonterra sites



The screenshots illustrate the process of updating a contractor profile in the system:

- Step 1:** The 'Contractors' landing page shows a list of contractors. The Contractor ID '3303' is highlighted.
- Step 2:** The 'Individual Contractors' tab is selected, and the contractor 'Katie' is highlighted in the list.
- Step 3:** The 'Individual Contractor Profile' page is shown with the 'Contractor Employee Details' section highlighted.
- Step 4:** The 'Status' dropdown is set to 'Active (CSM-ACT)'. The 'First Name' is 'Katie', 'Last Name' is 'Lochore', 'LMS Contractor Type' is 'Service Contractors (NZ) (90000001)', and 'Email' is 'katie.lochore@klinitialemail.co.nz'.
- Step 5:** The 'Save' button is highlighted.