



On/Offboarding Staff Checklist



Service Provider
Resource

Keep your company or organization's profile in the CLMS Supplier Portal as up-to-date and accurate as possible.

Adding a New Staff Member to your CLMS Profile

- ☐ Determine which role(s) the staff member will have in the CLMS:
Will they be a **Supplier Contract Representative** (able to view contracts, update your profile, and upload documents) and/or will they be a **Supplier Profile Administrator** (able to control which employees access the system - we recommend no more than 1-2 staff per organization in this role)?
- ☐ Add them as a contact in the CLMS, including full name, title, phone number, and e-mail address. *A VCH staff member will approve this addition to your profile.*
- ☐ Have them log in with their work e-mail address and create a password.
- ☐ Walk them through your information in the Supplier Portal and direct them to our training materials.



Removing a Former Staff Member

- ☐ Set the staff member's account to Inactive in your company or organization's profile.
- ☐ Remove the staff member's access by unclicking the role checkboxes next to their name. Re-assign Administrator permission to another staff member if needed.

A VCH staff member will approve the changes you've made to your profile.

Questions?

Please send questions to CLMSsupport@vch.ca or ask your Contract Manager or Contract Administrator for help.