


Compliance and Certification Management (CCM)



Beeline's Compliance and Certification Management (CCM) feature gives clients a centralized and automated process to ensure that their contractors have the latest compliance and certification requirements as mandated by their business industry, or local legislation prior to onboarding and throughout the duration of their assignment.

Please note that depending on your Beeline Platform settings, this feature may, or may not, be turned on. Reach out to your Beeline Representative to adjust settings.

How to navigate to Compliance and Certification Management (CCM) via Self-Service:

1. Log in to the Beeline Platform using your *username* and *password*. Your Home page appears.
2. Click the **My Preferences** icon  at the top right of the page in the Header Menu.
3. Hover over the **VMS Settings** menu item and click **Contingent Staffing**.
4. Click **Compliance and Certification Management (CCM)** in the list of available Contingent Staffing Self-Service features to display selection options.
5. From the Compliance and Certification Management (CCM) section, select one of the following options:
 - **Compliance Requirements:** Define compliance requirements, associate job titles and work locations that are required for each requirement.
 - **Compliance Requirement Groups:** Associate a specific requirement to a group.
 - **Compliance Requirement Notifications:** When an assignment is out of compliance (*i.e., an existing certification has expired, according to a new business policy a specific job title now requires CPR training, etc.*) notifications are sent to the contractor's configured recipients which may include their Supplier, MSP, Project Manager, and/or Hiring Manager. Suppliers and MSPs will receive a My To Do task that will take them to the Contractor's resource screen to make any applicable updates. Hiring Managers and Project Managers will simply receive a notification (FYI) that their contractor is out of compliance. This screen allows users to configure WHO should receive notifications when contractors are non-compliant and at what frequency.

Creating a new Compliance Request:

Complete steps 1-5 above.

6. Click **Compliance Requirements**.
7. Click **Add New**.
8. Fill out the Compliance Requirements:
 - **Name:** Name of the Compliance Requirement

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- **Compliance Requirement Group:** If Groups are defined in the Compliance Requirement Group section, they will show here. This allows you to associate this specific requirement to a group.
 - **Code:** Must enter a code to help identify the requirement.
 - **Description:** Enter a description here to help differentiate between compliance requirements.
 - **Active:** Indicates if the requirement should be active. If Active, any active request whose Job Title and/or Work Location matches this requirement will be required to comply with the requirement once the definition is saved. For active assignments, they will be required to comply, and notifications will be sent out once the background utility process runs.
 - **Comments:** Indicates whether users will have the option to enter comments or if they are required.
9. Continue filling out the Associated Dates, Renewal Frequency, Attachments, Associate Job Titles and Work Locations and Validation Event sections. There are descriptions that provide guidance within each section.
10. Click **OK** to Save or **Save and Add New** to continue adding more requirements.

Things to Note:

- Once the requirements are **set up and made active**, notifications are sent to users notifying them that they have compliance requirements that need to be completed. Depending on how many requirements are created and the number of assignments those requirements apply to, you can potentially receive numerous notifications, so it is recommended that communication is sent in advance to implement the CCM feature.
- Imported assignments are not currently supported.
- Visibility cannot be limited by requirement, so a user can view and edit all requirements or none.