

WEEKLY CLIENT BRIEF

Online compliance

Clear status.

Clear next steps.

Northline Field Services

19–23 October 2026 | Demonstration edition



12

CLIENT CONNECTIONS

10

MEETING REQUIREMENTS

02

NEED ATTENTION

06

OPEN ACTIONS

01 The quick read

Ten of twelve portal connections meet their client requirements. Two need attention: worker training in ISNetworld and insurance in Avetta. Six open actions are tracked below, including housekeeping items that do not currently affect approval.

ISNetworld	2 of 3 meeting	Training records + project history
ComplyWorks	3 of 3 low risk	One bulletin acknowledgement
Avetta	2 of 3 compliant	Updated insurance certificate
8am Solutions	3 of 3 approved	Two policy deficiencies

YOUR NEXT MOVE

Send the training records and current insurance certificate first.

ISNetworld

Northline Field Services / Account review / 23 October 2026

CONNECTED CLIENTS

03

Two meeting; one needs attention

SECTIONS COMPLETE

04 / 06

Two sections need attention

OPEN ACTIONS

02

Training and client documents

01 Account at a glance

● Company information

Complete

● Employee training

Attention needed

● Document center

Attention needed

● Questionnaire

Complete

● RAVS

Complete

● CSR Assure

Complete

HIRING CLIENT	CLIENT GRADE	WHAT IT MEANS
Alder Energy	A	Requirements met
Summit Midstream	A	Requirements met
Westhaven Resources	B	Training gap affects standing

02 Exactly what needs attention

01 Two worker training records

Westhaven: current confined-space certificates are missing for two assigned workers.

Send certificates; upload and recheck client standing.

ACTION NEEDED

Training lead

Due 26 Oct

02 Project experience list

Summit: the submitted project history is expired. Client grade remains A.

Provide the current list of recent and ongoing projects.

ACTION NEEDED

Operations

Due 27 Oct

ComplyWorks

Northline Field Services / Client compliance / 23 October 2026

LOW RISK CLIENTS

03 / 03

All client ratings remain green

QUESTIONNAIRE

100%

448 of 448 answers published

OPEN ACTION

01

Client bulletin acknowledgement

01 Client standing

HIRING CLIENT	CLIENT RATING	WHAT IT MEANS
Alder Energy	Low risk	No rating exceptions
Summit Midstream	Low risk	No rating exceptions
Westhaven Resources	Approved	One bulletin still outstanding

02 Complete the outstanding item

03 Client bulletin acknowledgement

Westhaven: the revised site access bulletin has not been acknowledged.

Review the bulletin and record the acknowledgement.

ACTION NEEDED

HSE lead

Due 26 Oct

PUBLISHED AND CURRENT

Questionnaire updated and published on 22 October. No unpublished answers remain in this sample account.

WHAT THIS MEANS

Green client ratings can coexist with outstanding acknowledgements.

Avetta

Northline Field Services / Client scorecard / 23 October 2026

CLIENT CONNECTIONS

03

Three connected hiring clients

COMPLIANT

02

Two green client statuses

NEEDS ATTENTION

01

One insurance requirement

01 Client scores and statuses

HIRING CLIENT	REPORTED STATUS	WHAT IT MEANS
Alder Energy	Compliant	Unchanged since last review
Summit Midstream	Compliant	Unchanged since last review
Westhaven Resources	Non-compliant	Insurance certificate expired

02 The reason behind the status

04 Updated liability insurance

Westhaven: the liability insurance certificate on file expired on 20 October.

Obtain the renewal certificate, submit it and track review.

ACTION NEEDED

Office manager

Due 26 Oct

STATUS CHANGE

Westhaven moved from compliant to non-compliant this period. Submission alone does not confirm acceptance.

CLOSE THE LOOP

Confirm the client status after Avetta completes its review.

8am Solutions

Northline Field Services / Approvals and deficiencies / 23 October 2026

APPROVED CLIENTS

03 / 03

All hiring client ratings approved

LISTED DEFICIENCIES

02

Policy documents need attention

APPROVAL EXCEPTIONS

00

No current rating restrictions

01 What your clients see

Hiring Client	Client Rating	What it Means
Alder Energy	Approved	No approval exception
Summit Midstream	Approved	Policy deficiency listed
Westhaven Resources	Approved	Policy deficiency listed

02 Resolve the listed deficiencies

05

Evacuation and rescue policy

Summit: the account lists this policy as missing. Client approval remains in place.

Confirm the applicable procedure and submit the policy.

ACTION NEEDED

HSE lead

Due 27 Oct

06

Quality management policy

Westhaven: the quality policy has not been uploaded to the required category.

Locate the approved policy, upload it and confirm receipt.

ACTION NEEDED

Quality lead

Due 28 Oct

APPROVED DOES NOT ALWAYS MEAN THERE IS NOTHING LEFT TO DO.

Fictional companies and data | For illustration only

100safety.ca

05 / 05