

WA Relationship Authorisation Manager User Guide

Inviting a person to act on your behalf

To act on your behalf, a person must have authorisation. You can invite anyone to act on your behalf.

If you are a sole trader with an ABN or you require a person to act on behalf of your business or volunteer organisation, please refer to the instructions titled, "Inviting a person to act on behalf of a business".

To invite another person ("a **representative**") to represent you, you **may**, depending on the online service, be required to sign in using an account against which you have already verified your identity. This restriction is a protection against identity thief and fraud.

The person you are inviting to be a representative will be emailed an invitation with a code. They will have 14 days to sign in and enter the code to accept the invitation.

Before starting, ensure you have the given name(s), family name and email address associated with the person you are inviting. The name you supply on the invitation must exactly match the name they have recorded against their account. Step 1.

How to invite another person to act on your behalf

Sign into the WARAM. This will automatically start you at the "My dashboard" / "Welcome" page.

COVERNMENT OF WESTERN AUSTRALIA	A Relationship Au	thorisation Man	nager			Accessibility	Contact us
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Step 2.

Click on the "My representatives" section tab.

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Step 3.

Click on the "Send an invitation" section tab.

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Step 4.

You should now be able to see the "Send an invitation" page.

Your name and email address will be displayed in the "name" and "email" fields. Before proceeding, check to ensure these details are correct.

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GOVERNMENT OF WESTERN AUSTRALIA				Accessibility Contact us
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Send an in	vitation			
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Enter entity details	Enter represent	tative details	Enter authorisation details	Send invitation
Before you get started	take a moment to check your personal detail	s are correct:		
Name -				
Email @				
If these details are cor	rect, click Next. If you need to update your det	ails go to Manage my account.		
Cancel Next				

Step 4. cont...

If your name and email address are correct, click on the "Next" button, located at the bottom of the page to the left side.

WA Relatio	onship Authorisation Manager		Accessibility Contact us
My dashboard Accept or decline	an invitation. My authorisations My representat	ives 🗸 My entities 🖌 Pending requests	Event history
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Step 5.

Next, read the instructions and then fill out the representative details as requested on this page.

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Family name							
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Confirm email							
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Step 5. cont...

Once you have filled out the representative details, click on the "Next" button, located at the bottom of the page to the left side.

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Family name							
Email							
Confirm email							

Step 6.

Next enter the authorisation details for the invitation.

Enter the required details into the boxes on the page for:

- Service: The online service the representative will be accessing on your behalf. This may be prefilled.
- Authorisation type: Please select "Service User" for now.
- **Start date:** The date you want the authorisation to start at. This can also be a future date. If unsure, please supply today's date.
- **End date:** The date you want the authorisation to end. Supply an end date if there is a fixed term to the authorisation. You can select "No end date" if relevant.

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Authorisation type What is an authorisation type? Start date		*		

Step 6. cont...

Click on the "Next" button located to the bottom left of the page.

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24 Jul 2024	<u>.</u>							
End date		No end date						
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Step 7.

Confirm the details of the invitation and complete the Declaration and Consent.

Read and review your invitation details located in the charcoal coloured information box, titled "Review and confirm invitation details".

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Step 7. cont...

Some services require additional information in order to complete the invitation and you will be shown the "Continue" button in place of the "Send" button.

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Other names associate Authorisation of Service BondsOnline	id with sentity Jetai s ♥	Authorisation type Service Administrator	Start date 24 July 2024	k.	End date None		
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Step 7. cont...

NOTE: Some services require you sign in using an account against which you have already verified your identity. For these services, you will not be permitted to continue and will be taken to a page with instructions on how to proceed.

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GOVERNMENT OF WESTERN AUSTRALIA						Accessibilit	y Contact us
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This means	s you must sign in using						
Use the san	ne account when signing into both the	WA Relationship Authorisation M	lanager and	1.			
Please:							
1. Read 2. Sign o	the following steps carefully before car out and close all browsers.	rying them out.					
3. Sign in	n again to the WA Relationship Authori	ation Manager.					
5. In the	WA Identity Gateway, choose from	r digital identity .					
Alternative	y please contact us for assistance.						
Cancel Back	Send						

Step 8.

If you are able to proceed and you agree with the Declaration, click the checkbox titled "I understand and accept this declaration", located near the bottom of the page underneath the "I declare that".

If you agree with the Consent, select the checkbox titled "I understand and consent to the sharing of my personal information", located near the bottom of the page underneath the "I consent to".

Once both checkboxes are set, click on the "Send" or "Continue" button.

GOVERNMENT OF WESTERN AUSTRALIA	WA Relationship	Authorisation Ma	nager	/		L Acces	sibility Contact us		
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Authoris: Service	ation details 👻	Authorisation type Service Administrator	Start date 25 July 2024		End date None				
Declara	n invitation code will be sent to	at © . The repre	sentative will need to sign in to t	heir account and enter th	he invitation code to accept	t the invitation.			
I decla I hav I am I am I und o o I hav	I declare that: I have used my own account to access this service. I am the person identified as the entity. I am creating a relationship between myses and the representative named above. I understand that by creating this relation ship: I decisions and actions undertain ny the representative named above with the service I have selected. I will not be notified when the reductions from the reductions and actions undertain ny the representative named above with the service named above will be treated as approved by me. I will not be notified when the reductive notion is to transact on my behalf with the service named above. I will not be notified when the reductive notion is to transact on my behalf with the service named above. I have reviewed the invitation detain and these correctly reflect my intent. I have reviewed the invitation detain and these correctly reflect my intent.								
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Cancel Bac	ck Send								

NOTE: At this stage in the process you also have several other choices available:

- Should you not agree with the Declaration or the Consent, click on the "Cancel" button and go to Step 11.
- If any of details on this page are incorrect, click on the "Back" button, located at the bottom of the page, to navigate back to the page (or pages) required to amend any errors or make changes.
- Should you wish to cancel this invitation and start again, click on the "Cancel" button located at the bottom of the page and go to Step 11.

Step 9.

If you have selected the:

- "Send" button, you should now be able to see the "Invitation sent" page, confirming that your invitation has been sent. Go to Step 10.
- "Continue" button, you will be advised that additional information is required.



Click "Continue". The selected online service will display a page (or pages) requesting the required additional information. Complete the pages and click the "Submit" (or equivalent) button located at the bottom of the page.

• Should you wish to cancel this invitation and start again, click on the "Cancel" button located at the bottom of the page. You will be shown the "Send invitation cancelled" page and the invitation will not be retained. Click "Continue" and go to Step 11.



Step 10.

Next, click on the "Continue" button, located at the bottom of the page.

GOVERNMENT OF WESTERN AUSTRALIA	WA Relation Manager	iship Au	thorisation			Accessibility	~ Contact us
My dashboard	Accept or decline a	n invitation	My authorisations	My representatives ${\color{black} {\color{black} }}$	My entities \checkmark	Pending requests	
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NOTE: As described under the heading "What happens next" on the "Invitation sent" page, your nominated representative will be sent an email invitation code for accepting the invitation. Once accepted, the representative may act on behalf of yourself. This invitation code will expire after 14 days.

Step 11.

After clicking on the "Continue" button from the previous page, you will either be taken to the:

- online service itself; or
- "My dashboard" / "Welcome" page.

WA Relation	Accessibility	Contact us				
My dashboard Accept or decline an	n invitation My authorisations M	My representatives 🐱	My entities 🗸	Pending requests		
Welcome If you are a first time or infrequent custo	mer of the WA Relationship Authorisati	ion Manager <u>please read th</u>	iis.			
Accept or decline an invitation Accept an invitation to act on behalf of a business or person. →	My authorisations Businesses or people you are currently authorised to act on behalf of. →	My represe Invite and mana businesses who on your behalf. →	centatives age the people or are authorised to ac	My en Administr represent business. →	tities or the business entities you or request access to a	1

Step 11. cont...

NOTE: If completed, the invitation will be visible from the "View invitations" section tab which can be found under the "My representatives" dropdown menu item or section tab on the "My dashboard" / "Welcome" page. From this area, you can view details of previously sent invitations, resend an invitation or withdraw an invitation.

WA Relation	ship Authorisation Manage	er	Accessibility Contact us
My dashboard Accept or decline an	invitation My authorisations My rep	presentatives 🗸 🛛 Ny entities 🗸	Pending requests
Welcome If you are a first time or infrequent custor	mer of the WA Relationship Authorisation M	anager please read this .	
Accept or decline an invitation Accept an invitation to act on behalf of a business or person. →	My authorisations Businesses or people you are currently authorised to act on behalf of. →	My representatives Invite and manage the people or businesses who are authorised to act on your behalf. →	Administer the business entities you represent or request access to a business. →

You can sign out by selecting your name at the top of the page and clicking on the "Sign out" button or close the service via the **X** in the top of the browser.

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WA Relationship Authorisation Manager						Manage my account
My dashboard	Accept or decline an invitation	My authorisations	My representatives 🐱	My entities \checkmark		

This completes the step-by-step instructions.

Need further assistance?

Contact the <u>government agency which supports the service</u> you are trying to access. Contact details are available by using either:

- 1. the "Contact us" link found in the WARAM header; and
- 2. the "Need assistance?" section in the WARAM footer.