



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.

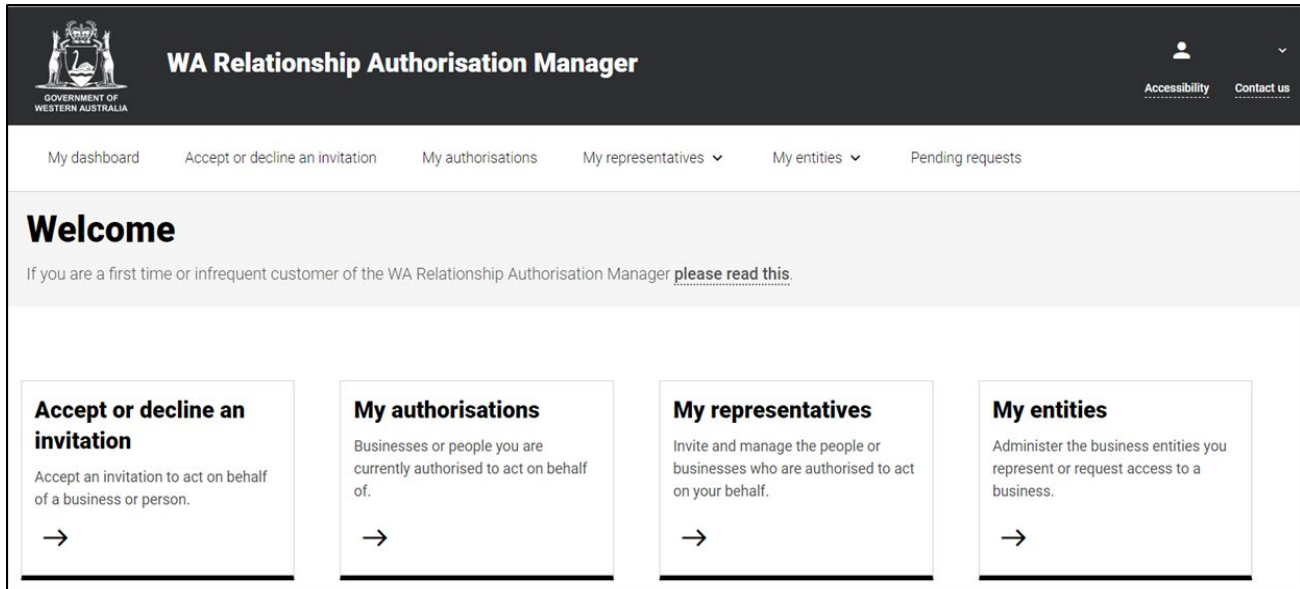
The person you are inviting to be a representative will be emailed an invitation with a code. They will have 14 days to sign in and enter the code to accept the invitation.

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.

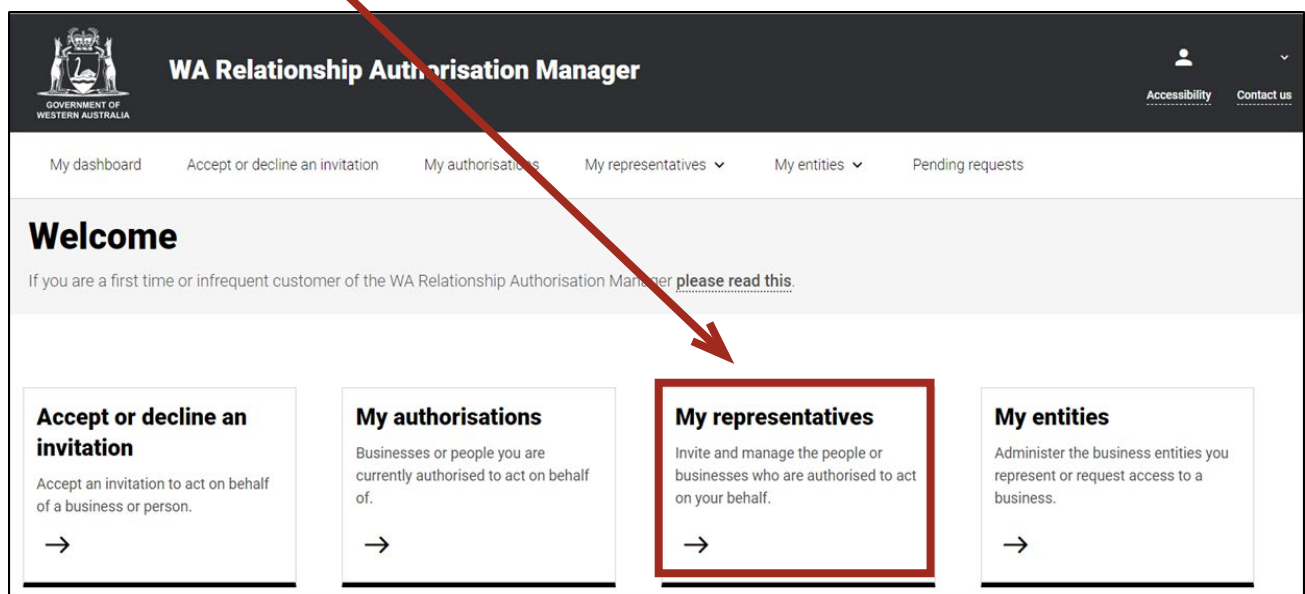
How to invite another person to act on your behalf

Sign into the [WARAM](#). This will automatically start you at the “My dashboard” / “Welcome” page.



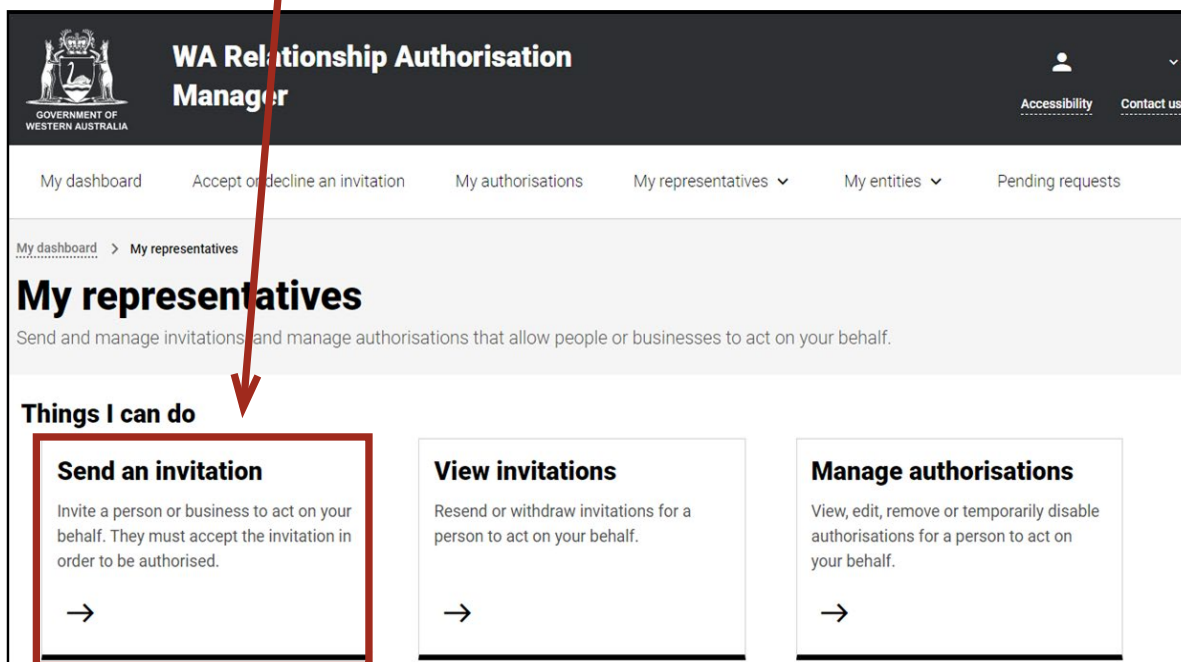
Step 2.

Click on the “My representatives” section tab.



Step 3.

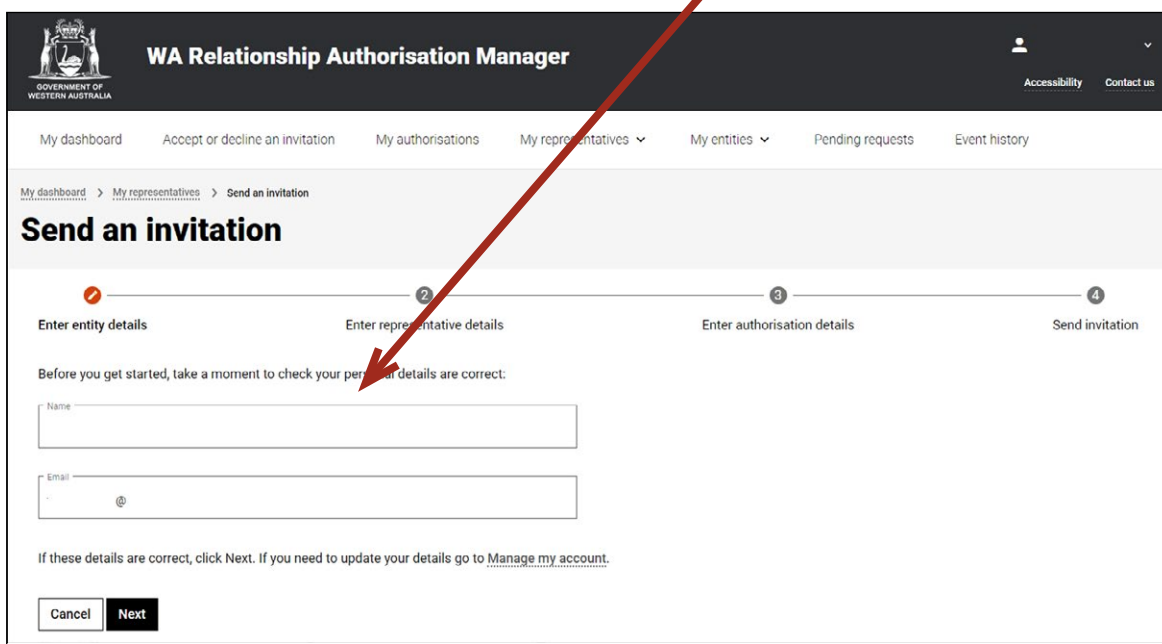
Click on the “Send an invitation” section tab.



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.



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 Relationship Authorisation Manager

My dashboard | Accept or decline an invitation | My authorisations | My representatives | My entities | Pending requests | Event history

My dashboard > My representatives > Send an invitation

Send an invitation

1 Enter entity details | 2 Enter representative details | 3 Enter authorisation details | 4 Send invitation

Before you get started, take a moment to check your personal details are correct:

Name

Email

If these details are correct, click Next. If you need to update your details go to [Manage my account](#).

Step 5.

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

WA Relationship Authorisation Manager

My dashboard | Accept or decline an invitation | My authorisations | My representatives | My entities | Pending requests | Event history

My dashboard > My representatives > Send an invitation

Send an invitation

1 Enter entity details | 2 Enter representative details | 3 Enter authorisation details | 4 Send invitation

Fill in the details of the representative. An invitation code will be sent to the email provided below. The representative will need to sign in to their account and enter the invitation code to accept the invitation.

- The name entered below must match the name on the representative's account.
- If the representative is known by one name, use the family name field.
- Use an email only the representative has access to. **Do not use a shared email address.**

Given name(s) No given name(s)

Family name

Email

Confirm email

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.

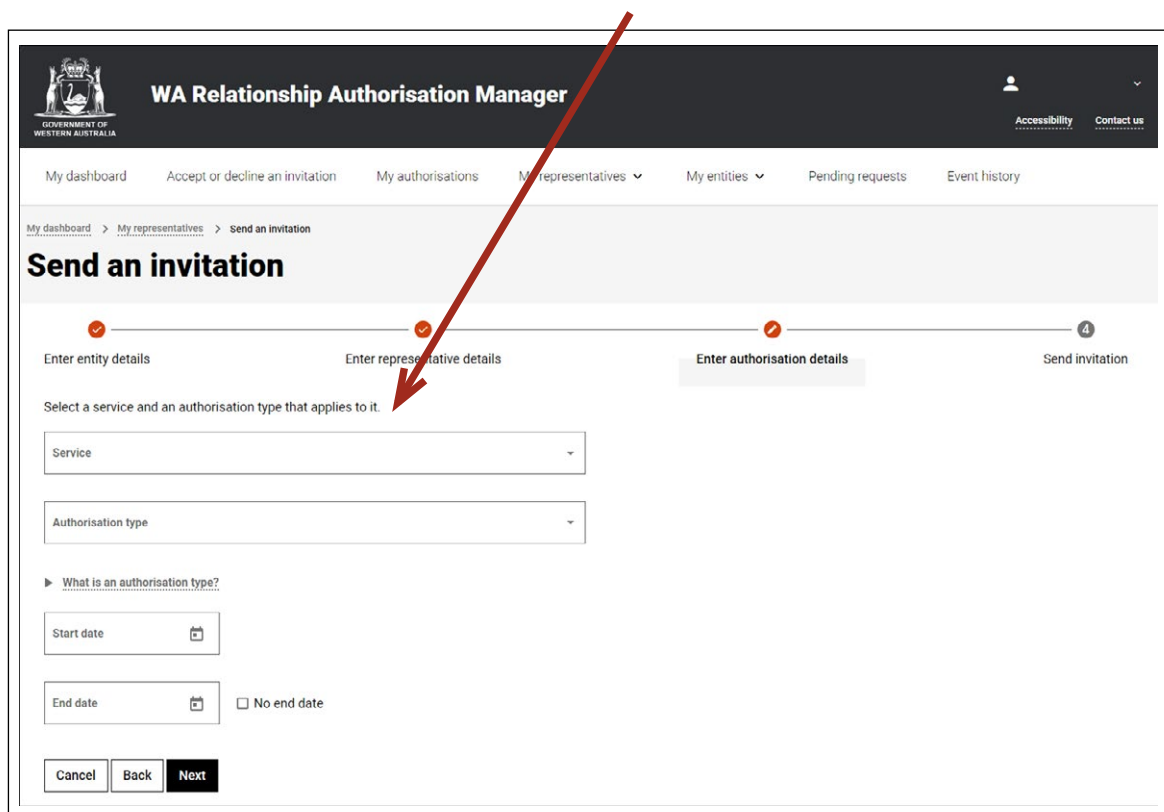
The screenshot shows the 'WA Relationship Authorisation Manager' interface. The page title is 'Send an invitation'. A progress bar at the top indicates four steps: 1. Enter entity details (completed), 2. Enter representative details (current step), 3. Enter authorisation details, and 4. Send invitation. Below the progress bar, there is a heading 'Send an invitation' and a sub-heading 'Enter representative details'. The main content area contains instructions: 'Fill in the details of the representative. An invitation code will be sent to the email provided below. The representative will need to sign in to their account and enter the invitation code to accept the invitation.' This is followed by three bullet points: 'The name entered below must match the name on the representative's account.', 'If the representative is known by one name, use the family name field.', and 'Use an email only the representative has access to. Do not use a shared email address.' There are four input fields: 'Given name(s)', 'Family name', 'Email', and 'Confirm email'. A checkbox labeled 'No given name(s)' is located to the right of the 'Given name(s)' field. At the bottom of the form, there are three buttons: 'Cancel', 'Back', and 'Next'. A red arrow points from the top right of the page towards the 'Next' button.

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.



The screenshot shows the 'WA Relationship Authorisation Manager' interface. The page title is 'Send an invitation'. A progress bar at the top indicates four steps: 'Enter entity details' (completed), 'Enter representative details' (current step, highlighted with a red arrow), 'Enter authorisation details' (pending), and 'Send invitation' (pending). Below the progress bar, the user is prompted to 'Select a service and an authorisation type that applies to it.' There are two dropdown menus: 'Service' and 'Authorisation type'. Below these, there is a section titled 'What is an authorisation type?' with a 'Start date' field and an 'End date' field. A checkbox labeled 'No end date' is also present. At the bottom, there are three buttons: 'Cancel', 'Back', and 'Next'.

Step 6. cont...

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

The screenshot shows the 'WA Relationship Authorisation Manager' interface. At the top, there is a navigation bar with the Government of Western Australia logo and the title 'WA Relationship Authorisation Manager'. Below this is a breadcrumb trail: 'My dashboard > My representatives > Send an invitation'. The main heading is 'Send an invitation'. A progress indicator shows four steps: 'Enter entity details', 'Enter representative details', 'Enter authorisation details', and 'Send invitation'. The 'Send invitation' step is currently active. Below the progress bar, there is a form with the following fields: 'Service' (Resources Online), 'Authorisation type' (Service User), 'Start date' (24 Jul 2024), and 'End date' (with a checked 'No end date' option). At the bottom left, there are three buttons: 'Cancel', 'Back', and 'Next'. A red arrow points to the 'Next' button.

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”.

The screenshot shows the 'Send an invitation' page in the WA Relationship Authorisation Manager. At the top, there is a navigation bar with the Government of Western Australia logo and the title 'WA Relationship Authorisation Manager'. Below the navigation bar, there are several menu items: 'My dashboard', 'Accept or decline an invitation', 'My authorisations', 'My representatives', 'My entities', 'Pending requests', and 'Event history'. The main heading is 'Send an invitation'. Below this, there is a progress bar with four steps: 'Enter entity details', 'Enter representative details', 'Enter authorisation details', and 'Send invitation'. The 'Send invitation' step is currently active. Below the progress bar, there is a section titled 'Review and confirm invitation details' which is highlighted in a charcoal color. This section contains a table with the following details:

Entity		Representative	
Name		Name	Email
Authorisation details			
Service	Authorisation type	Start date	End date
	Service Administrator	25 July 2024	None

Below the table, there is an information box with an 'i' icon and the text: 'An invitation code will be sent to [] at [] @ []. The representative will need to sign in to their account and enter the invitation code to accept the invitation.'

Below the information box, there is a section titled 'Declaration and consent'. It contains two sections: 'I declare that:' and 'I consent to:'. The 'I declare that:' section has a list of bullet points, and the 'I consent to:' section has a single bullet point. At the bottom of the page, there are three buttons: 'Cancel', 'Back', and 'Send'.

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.

WA Relationship Authorisation Manager

My dashboard | Accept or decline an invitation | My authorisations | My representatives | My entities | Pending requests | Event history

My dashboard > My entities > Send an invitation

Send an invitation

Progress bar: Select an entity (✓) | Enter representative details (✓) | Enter authorisation details (✓) | **Send invitation (✓)**

Review and confirm invitation details

Entity		Representative	
Current legal name	ACN	Name	Email
Other names associated with the entity			
Authorisation details			
Service	Authorisation type	Start date	End date
BondsOnline	Service Administrator	24 July 2024	None

Info: An invitation code will be sent to [] at [] @ []. The representative will need to sign in to their account and enter the invitation code to accept the invitation.

Declaration

I declare that:

- I have used my own account to access this service.
- I am creating a relationship between the entity and the representative named above.
- I am authorised to create this relationship on behalf of the entity named above.
- I understand that by creating this relationship:
 - the representative named above will be authorised to transact on behalf of the entity named above with the service I have selected.
 - all decisions and actions undertaken by the representative named above with regards to the service named above will be treated as approved by the entity.
 - the entity named above will **not** be notified when the representative whom I have authorised chooses to transact on behalf of the entity with the service named above.
 - the representative's name and email address may be shared with the service named above.
- I have reviewed the invitation details and these correctly reflect my intent.
- I understand that by creating this relationship:
 - the representative named above will be able to authorise other representatives to transact on behalf of the entity named above with the service named above.
 - I will **not** be notified when the representative named above authorises other representatives to transact on behalf of the entity named above with the service named above.

I understand and accept this declaration

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.

WA Relationship Authorisation Manager

My dashboard Accept or decline an invitation My authorisations My representatives My entities Pending requests Event history

My dashboard > My representatives > Send an invitation

Send an invitation

Enter entity details Enter representative details Enter authorisation details **Send invitation**

Review and confirm invitation details

Entity		Representative	
Name		Name	Email

Authorisation details			
Service	Authorisation type	Start date	End date
	Service Administrator	28 October 2024	None

PLEASE READ

In order to transact with _____, you must sign in using an account where you have proven your digital identity.

This means you must sign in using _____.

Use the **same account** when signing into both the WA Relationship Authorisation Manager and _____.

Please:

1. Read the following steps carefully before carrying them out.
2. Sign out and close all browsers.
3. Sign in again to the WA Relationship Authorisation Manager.
4. On the Sign in page, select "Sign in using your digital identity".
5. In the WA Identity Gateway, choose from _____.

Alternatively 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.

WA Relationship Authorisation Manager

My dashboard | Accept or decline an invitation | My authorisations | My representatives | My entities | Pending requests | Event history

Send an invitation

Enter entity details | Enter representative details | Enter authorisation details | **Send invitation**

Entity		Representative	
Name		Name	Email
			@

Authorisation details			
Service	Authorisation type	Start date	End date
	Service Administrator	25 July 2024	None

An invitation code will be sent to @ . The representative will need to sign in to their account and enter the invitation code to accept the invitation.

Declaration and consent

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 myself and the representative named above.
- I understand that by creating this relationship:
 - the representative named above will be authorised to transact on my behalf with the service I have selected.
 - all decisions and actions undertaken by the representative named above with the service named above will be treated as approved by me.
 - I will **not** be notified when the representative whom I have authorised chooses to transact on my behalf with the service named above.
 - the representative's name and email address may be shared with the service named above.
- I have reviewed the invitation details and these correctly reflect my intent.

I understand and accept this declaration

I consent to:

- The sharing of my personal information, including my full name, date of birth and email address, with the service named above in accordance with the [privacy statement](#) when the representative is transacting on my behalf.

I understand and consent to the sharing of my personal information

Cancel | Back | **Send**

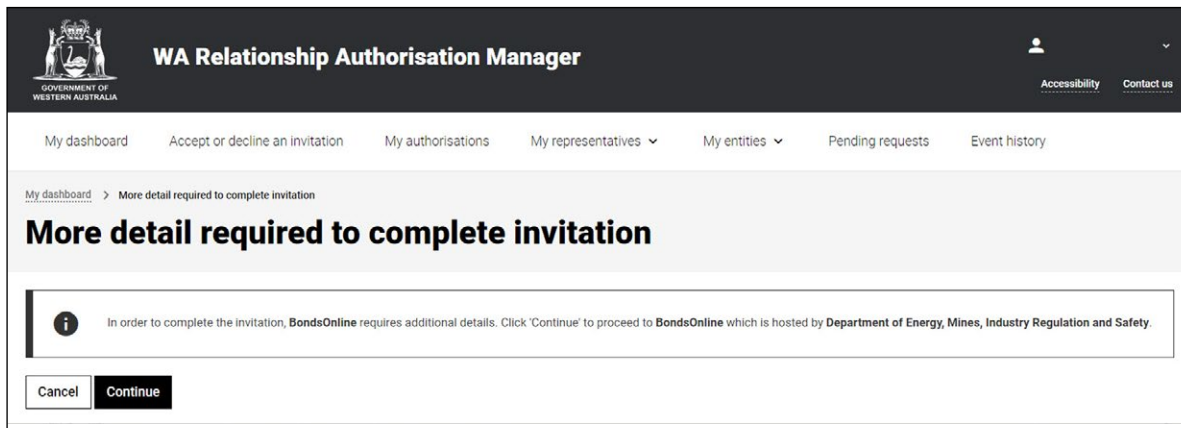
NOTE: At this stage in the process you also have several other choices available:

- 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.

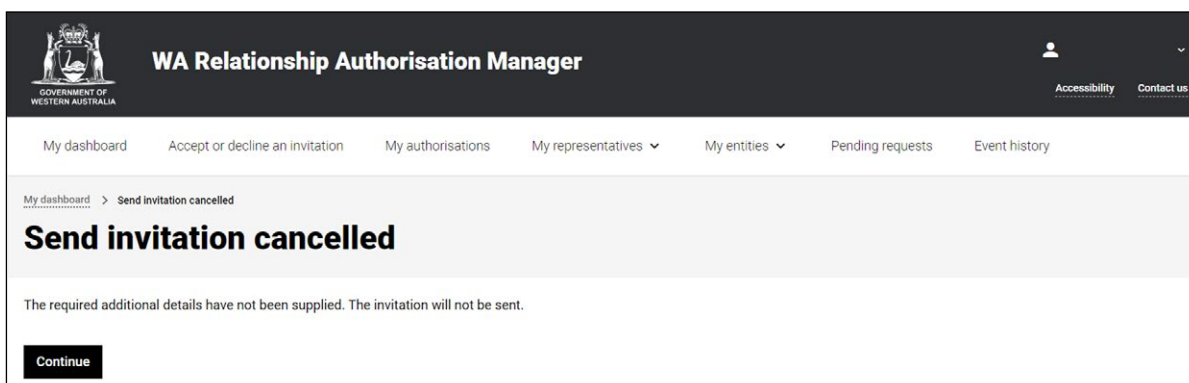
If you have selected the:

- “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.



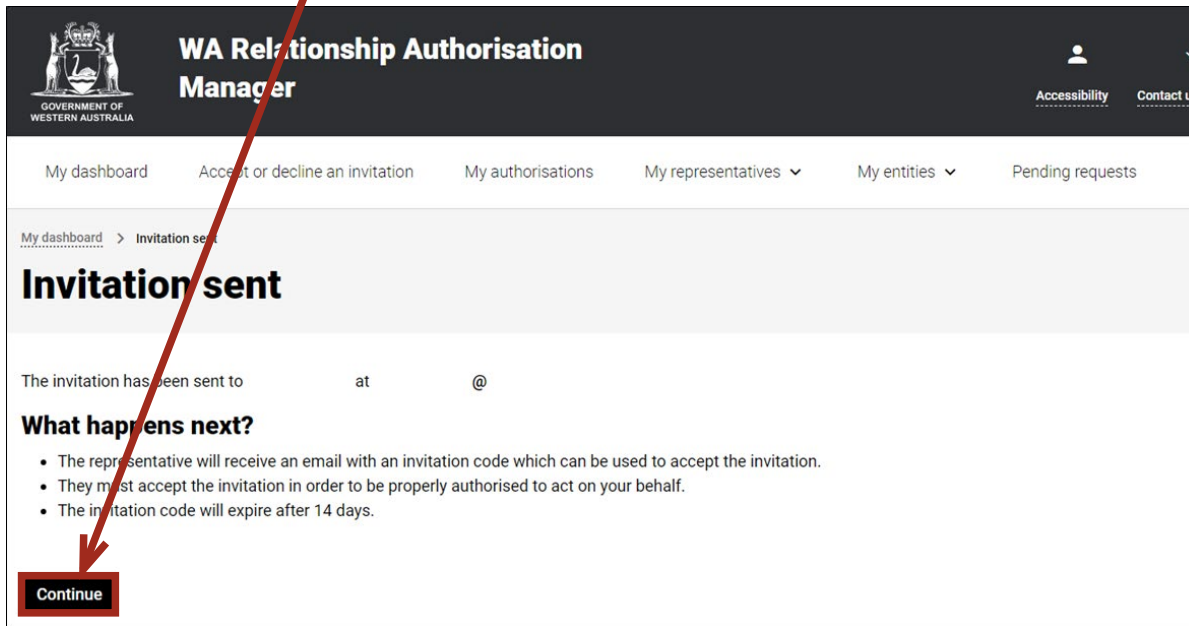
Click “Continue”. The selected online service will display a page (or pages) requesting the required additional information. Complete the pages and click the “Submit” (or equivalent) button located at the bottom of the page.

- 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.

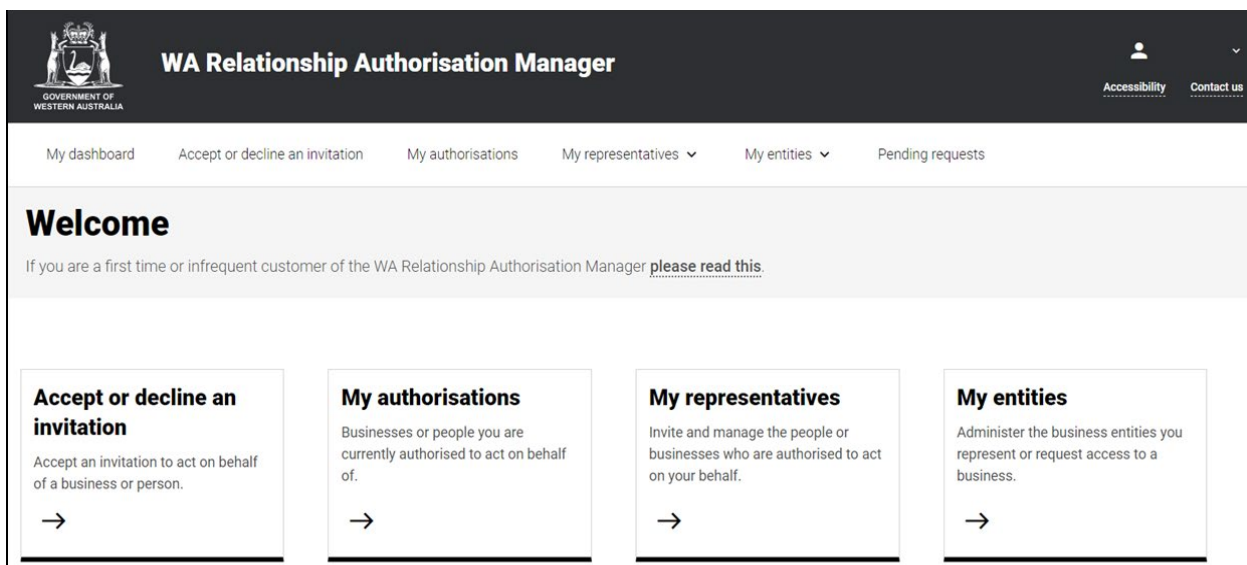


NOTE: As described under the heading “What happens next” on the “Invitation sent” page, your nominated representative will be sent an email invitation code for accepting the invitation. Once accepted, the representative may act on behalf of yourself. This invitation code will expire after 14 days.

Step 11.

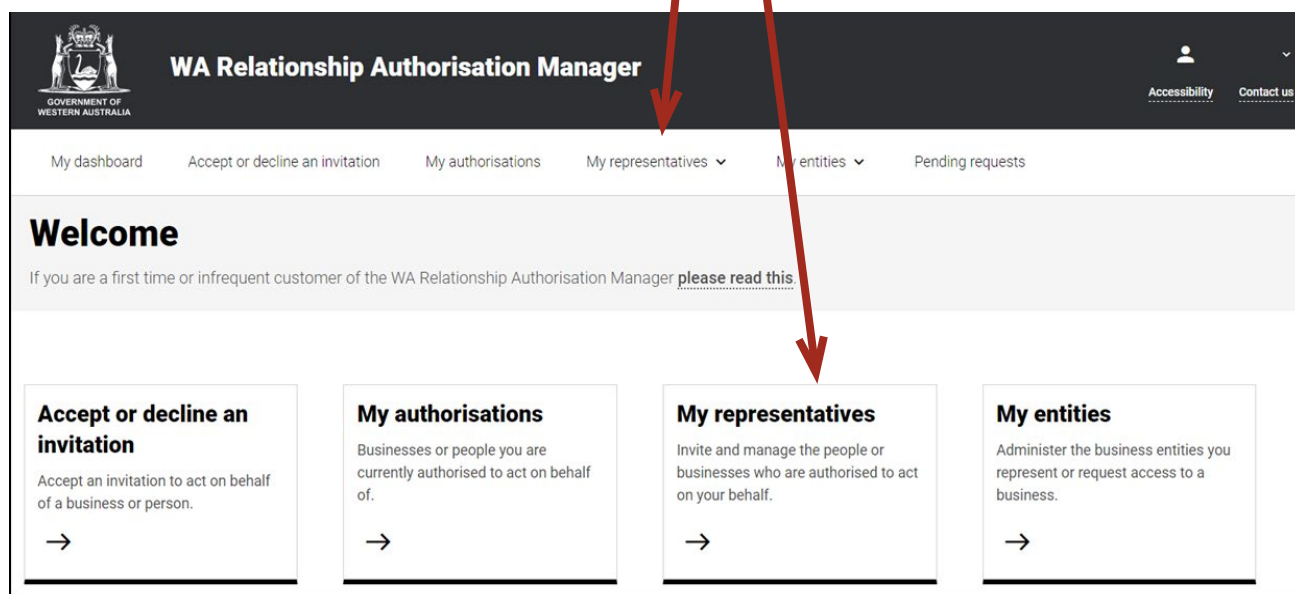
After clicking on the “Continue” button from the previous page, you will either be taken to the:

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

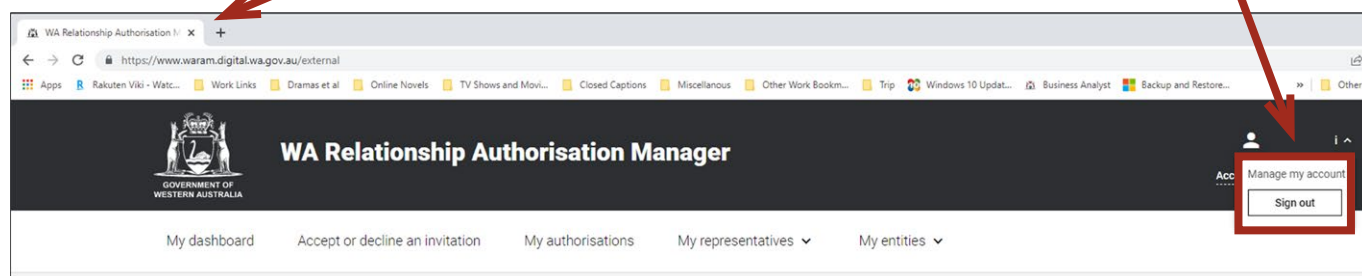


Step 11. cont...

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.



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.



This completes the step-by-step instructions.

Need further assistance?

Contact the [government agency which supports the service](#) 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.