

# WA Relationship Authorisation Manager User Guide

## Requesting authorisation to act on behalf of a business

To act for a business or another entity e.g. a volunteer organisation or a sole trader, a person must have an authorisation.

A business can be a public or private company, partnership, trust, superannuation fund, sole trader, incorporated association, strata title, co-operative, diplomatic/consulate body or high commission, syndicate (who has an ABN), local government jurisdiction or a state, territory or commonwealth agency or any other type of non-person entity.

If you have not been authorised to act on behalf of a business, you can submit a request to obtain the necessary access. Please be aware that you may be asked to provide proof that you are allowed to act on behalf of the requested business.

You cannot request authority to act for another person, they must invite you to act on their behalf. Please contact the person or the <u>government agency which supports the service</u> you are trying to access to arrange for them to send you an invitation.

After a request has been submitted, it will be forwarded to any current "Service Administrators" for the business. If there are no "Service Administrators" the request will be sent to the agency who supports the service you are attempting to access.

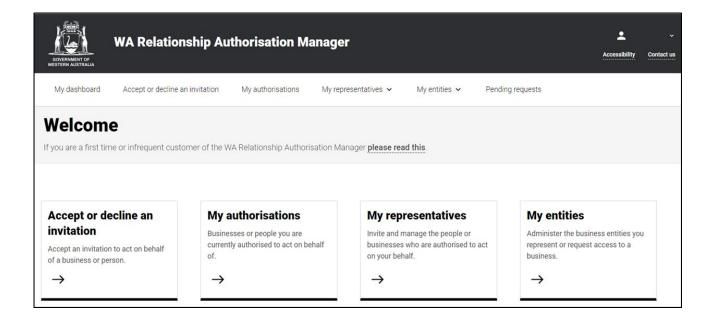
Requests that have not been actioned will expire after 30 days.

Some services and emails will embedded links that navigate you directly to the Request Authorisation function. Go to Step 4 for instructions on how to complete the request.

#### Step 1.

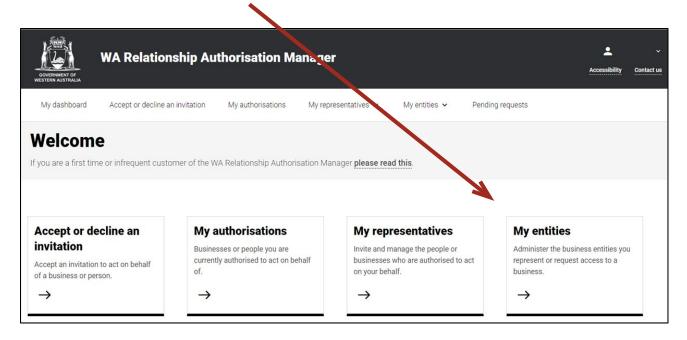
#### How to request authorisation to act on behalf of a business

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



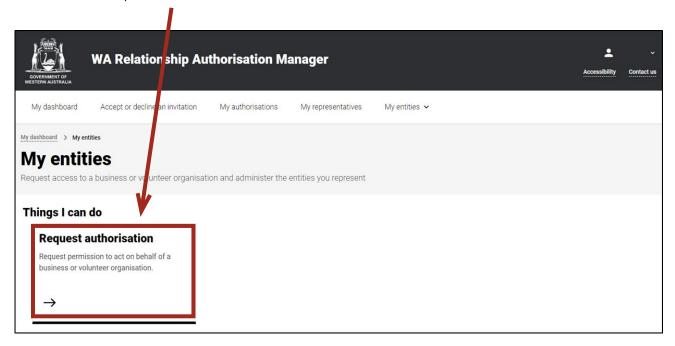
#### Step 2.

Click on the "My entities" section tab.



#### Step 3.

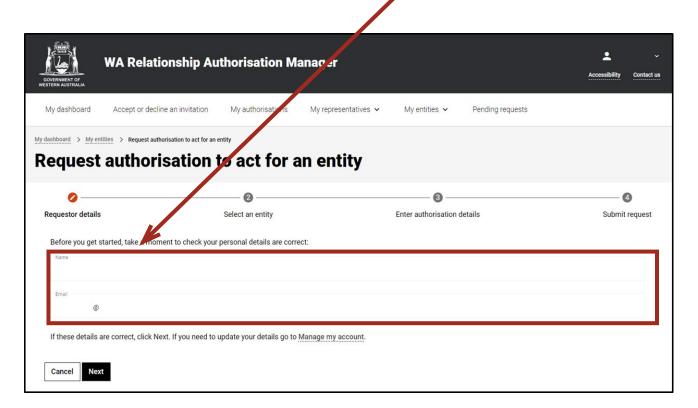
Click on the "Request authorisation" section tab.



#### Step 4.

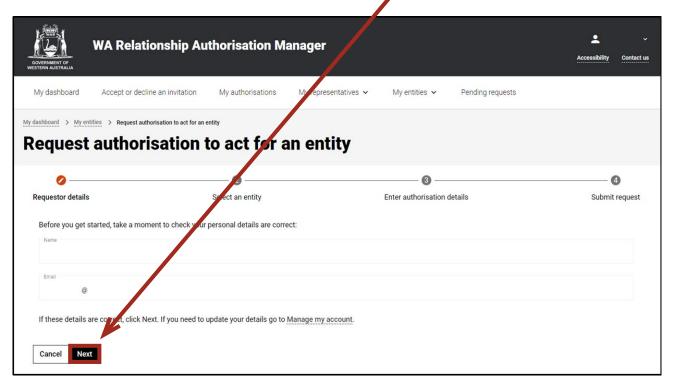
You should now be able to see the "Request authorisation to act for an entity" page.

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.

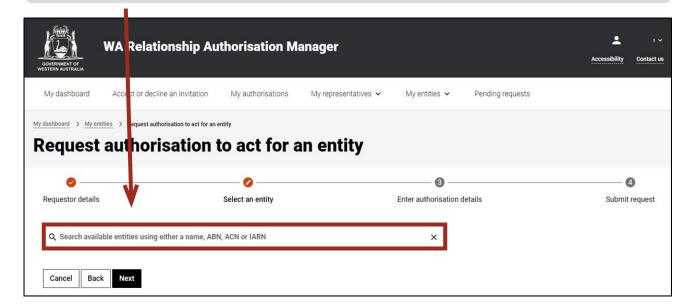


#### Step 5.

The next step is to select the entity you wish to act on behalf of i.e. represent.

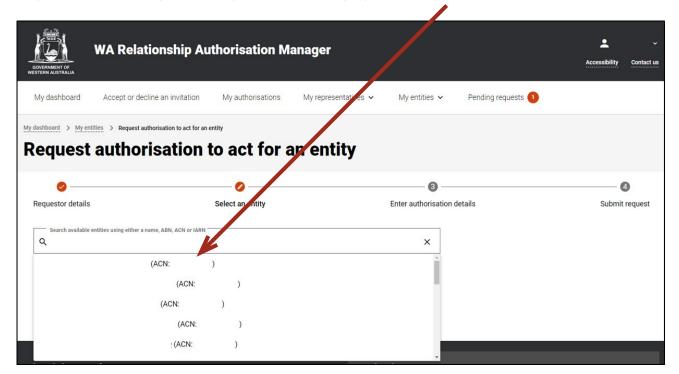
In the box displayed, enter a part of the entity's name, or their Australian Business Number (ABN) or their Australian Company Number (ACN) or their Incorporated Association Reference Number (IARN).

NOTE: An IARN is the unique identifier assigned to an entity in WA Associations Online.

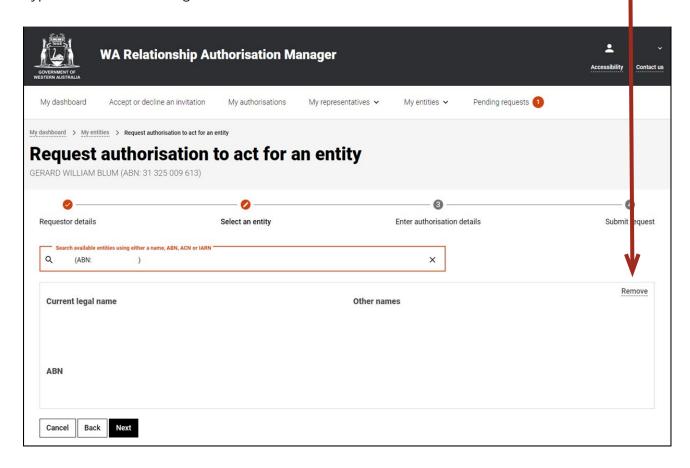


#### Step 5. cont...

As you enter the entity's name, options will be displayed directly below the box:

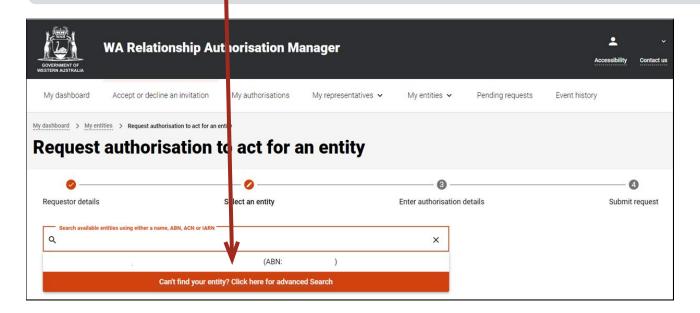


From the displayed list, select the entity. It will then be displayed below the search box. If you have selected the wrong entity, either search again and select the correct entity or click on the "Remove" hyperlink found to the right of the "Other names".

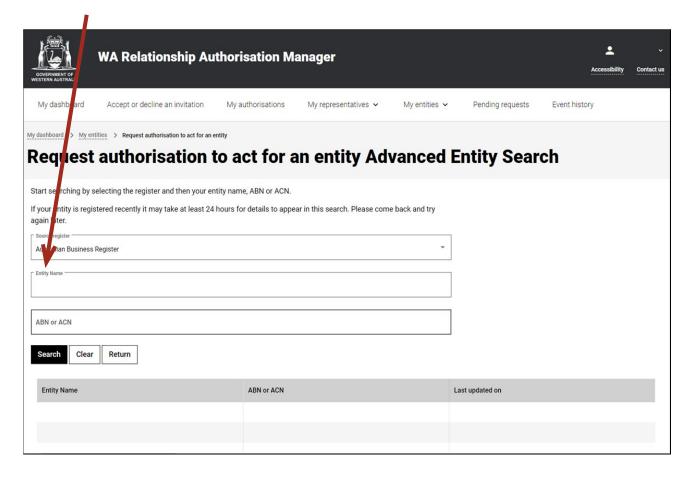


#### Step 5. cont...

**NOTE:** The search will return the first 20 businesses or volunteer organisations which match the supplied information. If you cannot find the entity you require, select "Can't find your entity? Click here for advanced search" at the bottom of the list.



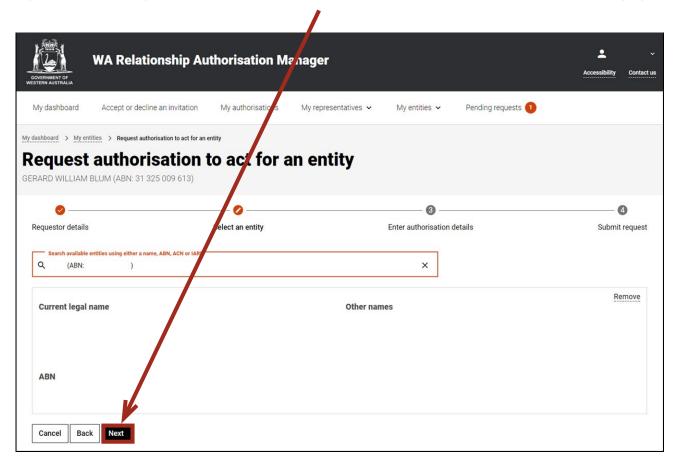
Then using the advanced search results, select the register you wish to search, supply either a name or an ABN or ACN and click the "Search" button.



#### Step 5. cont...

Once you find the entity you require, click on the "Entity Name" in the grid. The chosen entity will display.

If your chosen entity is correct, click on the "Next" button, located to the bottom left of the page.

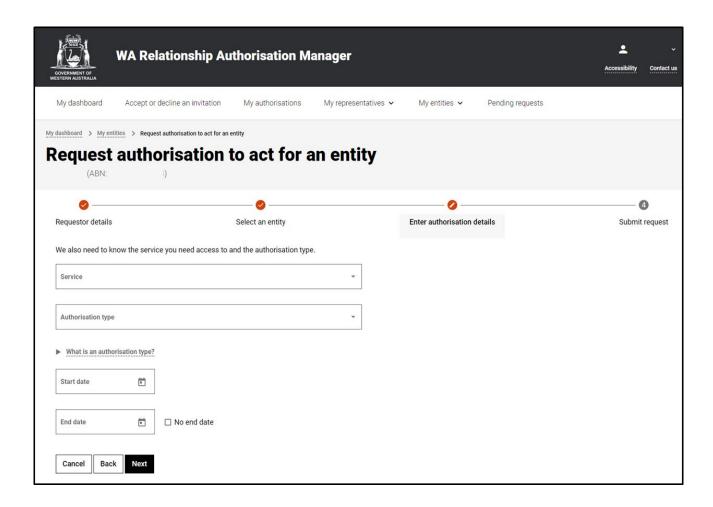


#### Step 6.

Next enter the authorisation details for the request.

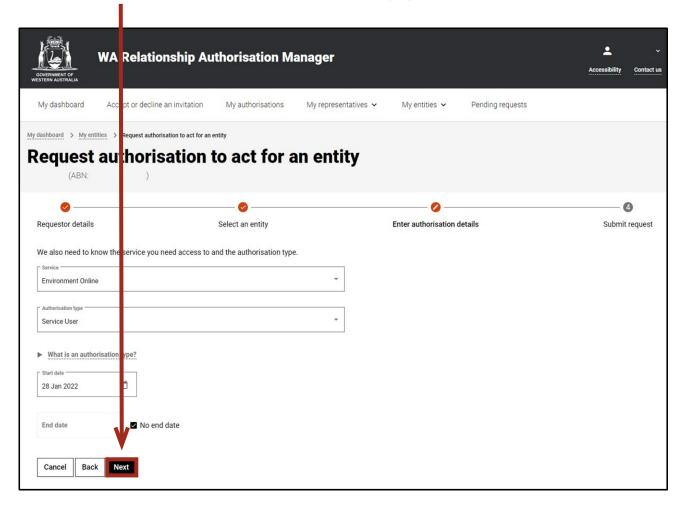
Enter the required details into the boxes on the page for:

- Service: The online service you will be accessing on behalf of the business. This may be prefilled.
- **Authorisation type:** If you wish to be allowed to manage the entity's authorisations in the WARAM, select "Service Administrator", otherwise select "Service User".
- **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 e.g. for an employee or other consultant.



### Step 6. cont...

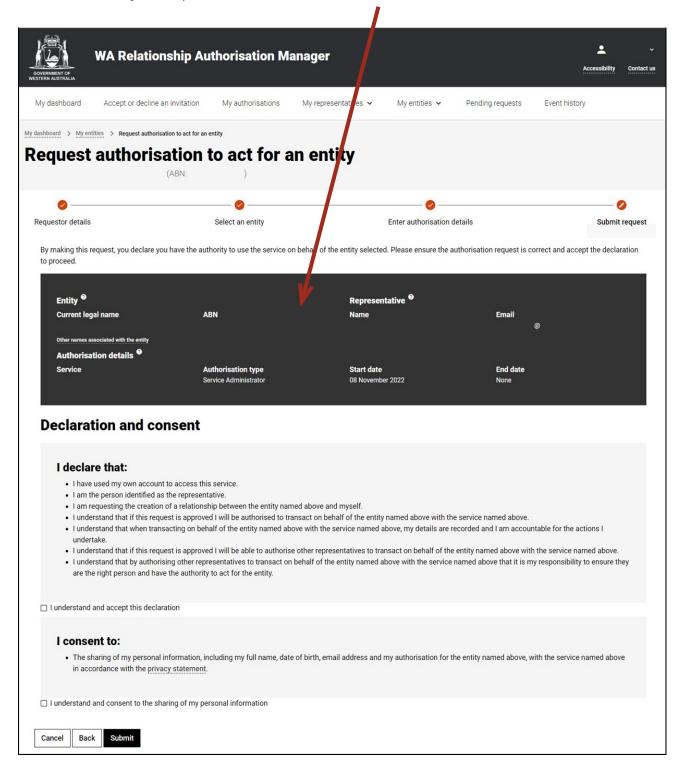
Click on the "Next" button located at the bottom of the page.



#### Step 7.

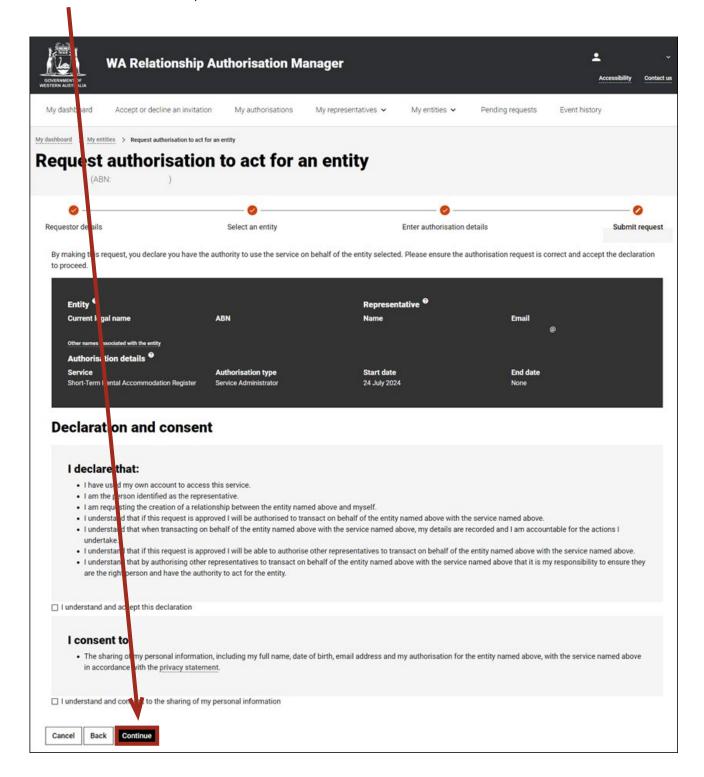
Confirm details of the request and complete the Declaration and Consent.

Read and review your request details located in the charcoal coloured information box.



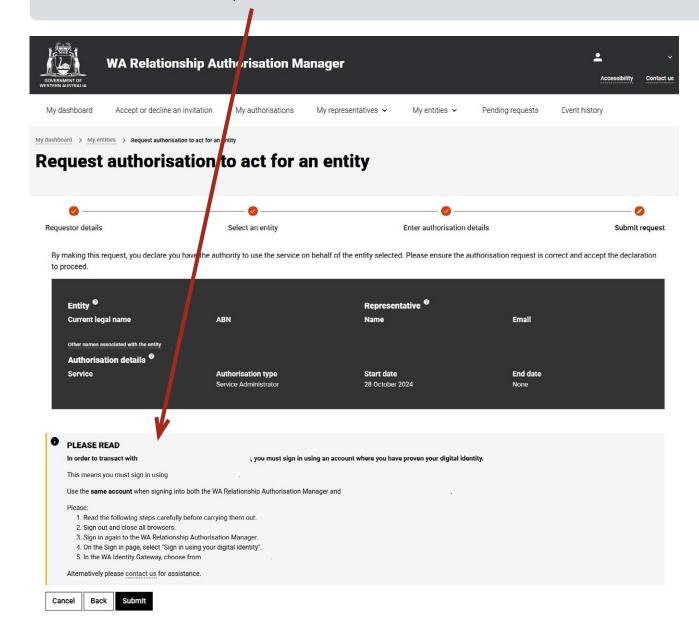
#### Step 7. cont...

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



## 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.

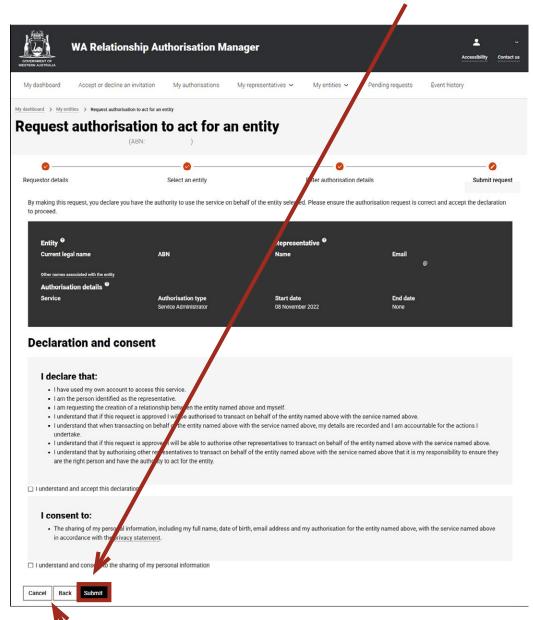


#### Step 8.

If you are able to proceed and you agree with the Declaration, select 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 selected, click on the "Submit" or "Continue" button.



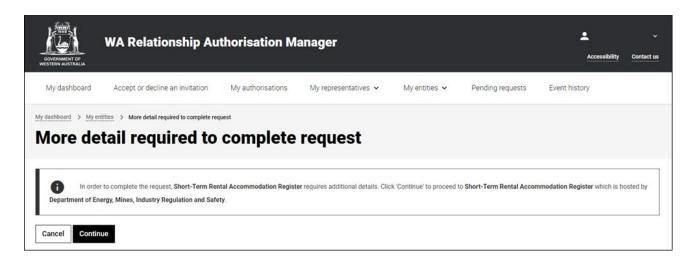
**NOTE:** At this stage in the process you also have several other choices available:

- 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 request and start again, click on the "Cancel" button located at the bottom of the page and go to Step 11.

#### Step 9.

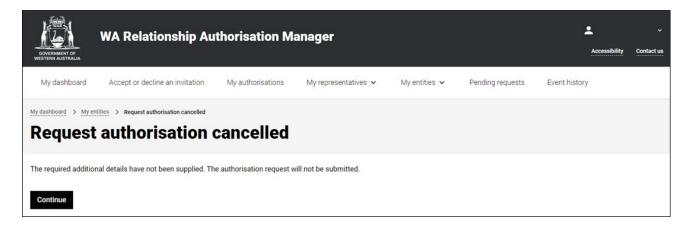
If you have selected the:

- "Submit" button, you should now be able to see the "Authorisation request submitted" page, confirming that your request has been submitted. Go to Step 10.
- "Continue" button, you will be advised that additional information is required.



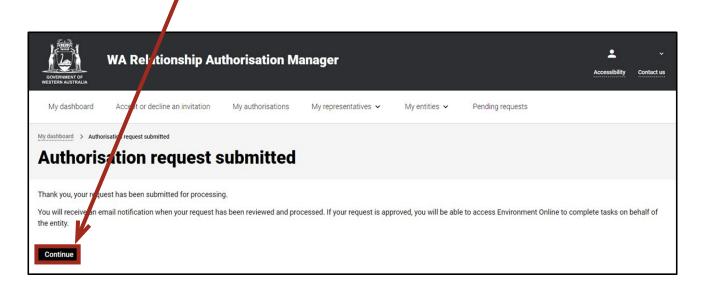
Click "Continue". The selected online service will display a page (or pages) requesting the required additional information. Complete the pages and click the "Submit" button located at the bottom of the page.

• Should you wish to cancel this request and start again, click on the "Cancel" button located at the bottom of the page. You will be shown the "Request authorisation cancelled" page and the authorisation request 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.

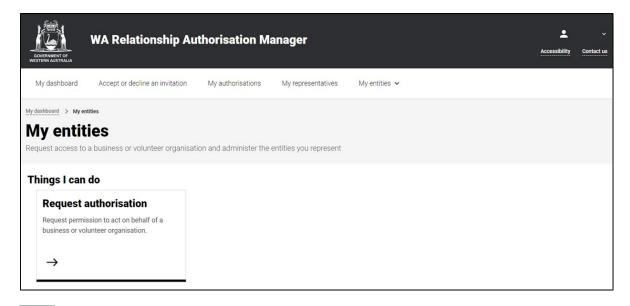


**NOTE:** As described on the "Authorisation request submitted" page, your request will be sent for processing and you will be advised when the request is approved or declined. The request will be sent to any existing "Service Administrators" for your nominated entity. If there are no "Service Administrators" the request will be sent to the agency which supports the service you have included in your request. This request will expire after 30 days.

#### Step 11.

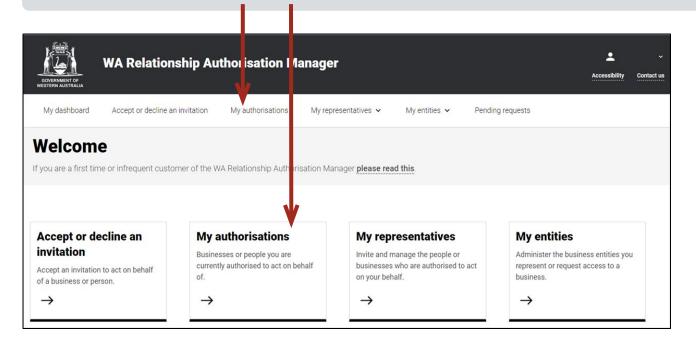
After clicking on the "Continue" button from the previous page, you will either be taken to the:

- · online service itself; or
- "My entities" page.

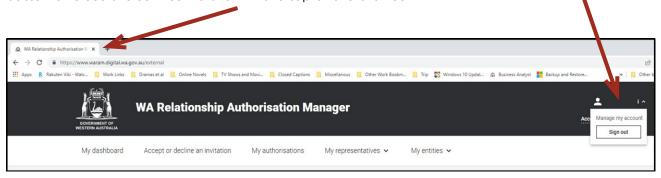


#### Step 11.

**NOTE:** If completed, the request will be visible from the "My authorisations" section tab which can be found under the "My authorisations" dropdown menu item or section tab on the "My dashboard" / "Welcome" page. From this area, select "Pending requests" to view details of previously sent requests or withdraw the request.



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

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