

First Supplier Contract Management Training Document

Scheme participant – Self registration, Submit profile and application.

Versions and Descriptions

Version	Author(s)	Date	Comments
0.1	Ai Keow Lin	26 June 23	Create document
1	Thania Kruger	7 July 23	Final
1.1	Ian Goodacre	20 July 23	Separate Scheme Participant
1.2	Ian Goodacre	26 July 23	Remove instructions for the State Department Contact to certify the Entity Scheme Participant Type.
2	Thania Kruger	26 July 23	Final
2.1	Jenn Baddams Ranada	5 Sept 23	Add instructions for multi-entity applications

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Scheme Participant Application

1.1 Introduction

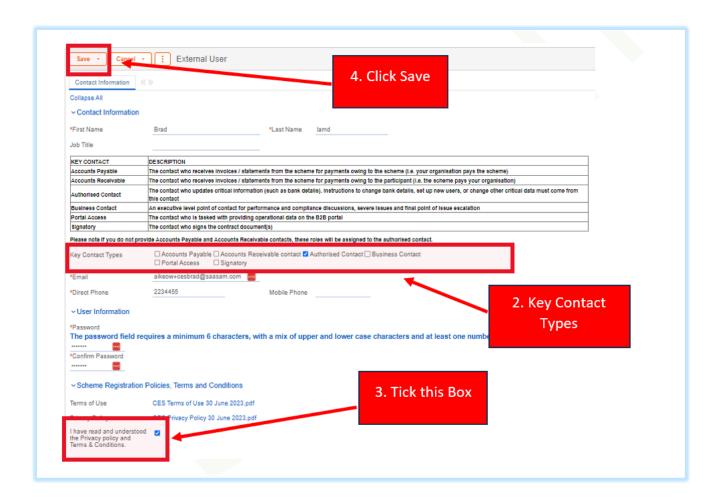
The Authorised Contact of a prospective Scheme Participant must self-register, complete and submit a profile, enter complete details of the Entity and complete and submit a Scheme Application.

This document provides guidance to the Authorised Contact of the prospective Scheme Participant, to self-register, complete and submit the Scheme Participant Profile, enter complete details of the Entity and to complete and submit the Scheme Application.

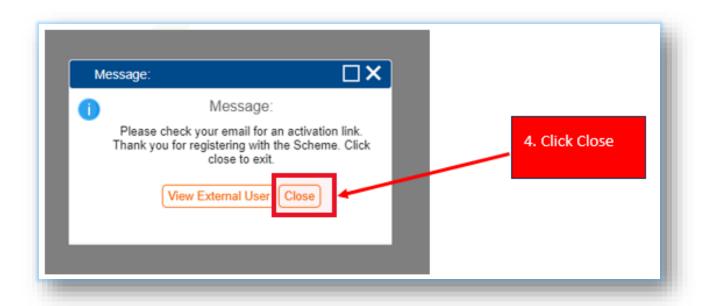
1.2 Self-Registration Process

Scheme Participant Application starts with the potential participant self-registering by clicking the link provided on Scheme website. The potential Participant is known as the "Authorised Contact".

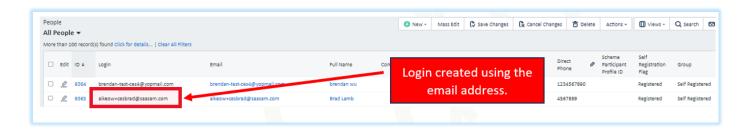
- Fill in the Self-Registration Form.
 - 1. Fill in contact information. All required fields are marked with *.
 - First Name
 - Last name
 - Email
 - Direct Phone
 - Password
 - Confirm Password
 - 2. Select the relevant Key Contact Types. Key Contact Types is defaulted to "Authorised Contact".
 - 3. Tick the "I have read and understood the Privacy Policy and Terms & Conditions" box.
 - 4. Click Save.



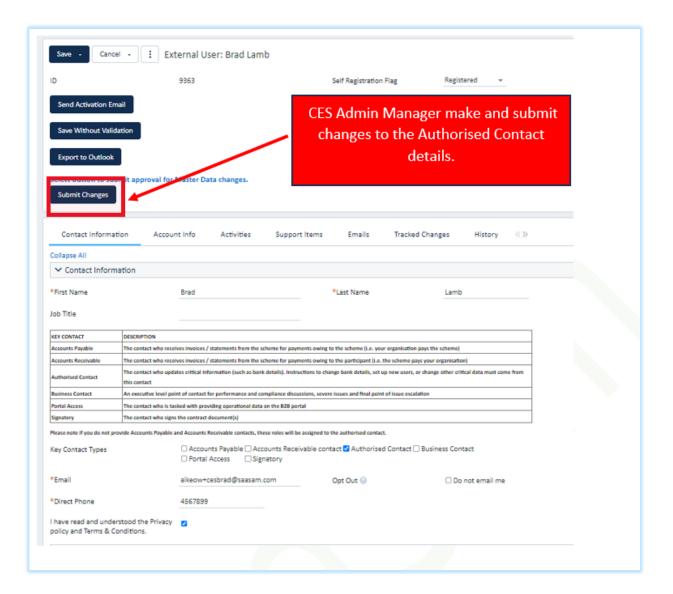
• The following message will appear once the record is saved. Click Close to exit.



A login is created for the Authorised Contact using the email address provided.



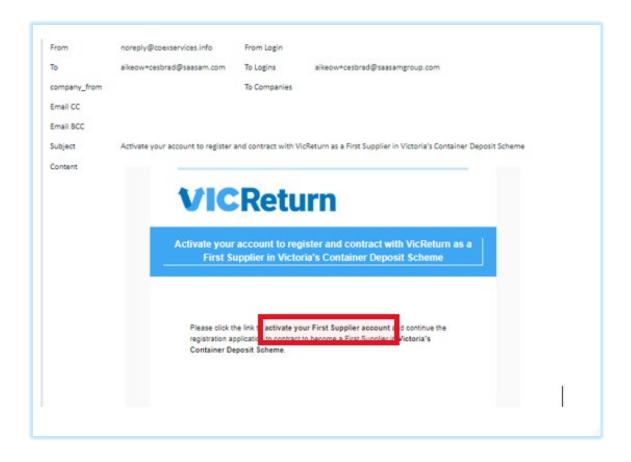
• An admin Manager can make changes to the Authorised Contact details from this point.



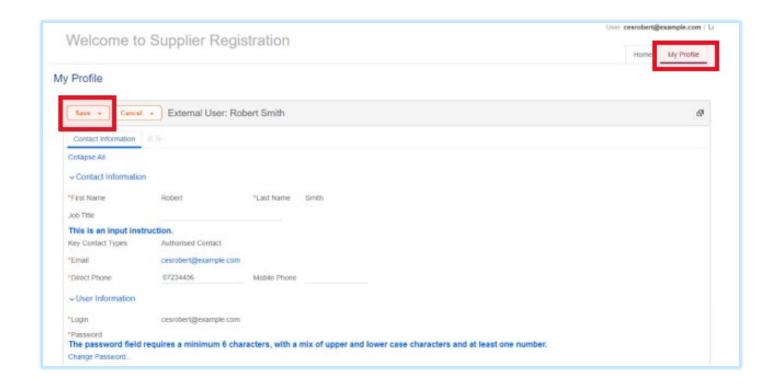
1.3 Verifying Email

An email is sent to Authorised Contact, for the Authorised Contact to activate the account.

• Click on the link provided to verify the email address and activate the account.



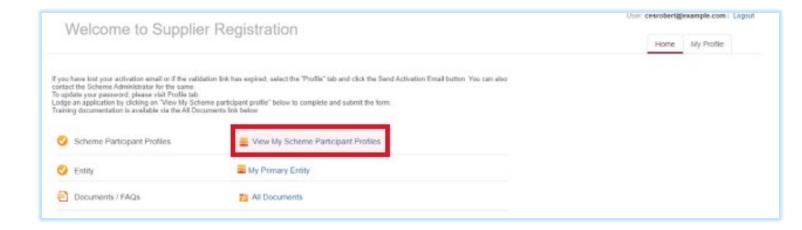
- A Supplier Profile record is created once the email has been verified by the Authorised Contact.
- Authorised Contact changing their contact details.
 - o Click on "My Profile" tab.
 - o Change contact details.
 - o Click "Save" button to save the changes.



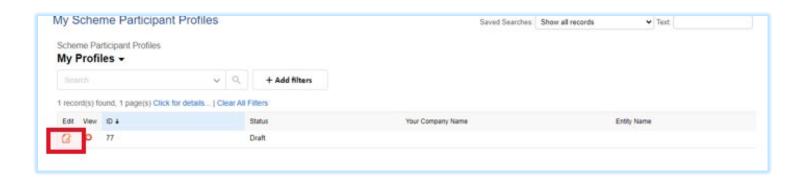
1.4 Authorized Contact Completing the Scheme Participant Profiles

Login to the CES Supplier Registration Application.

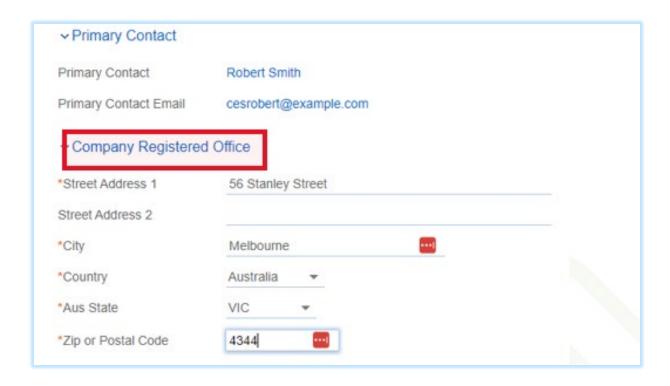
• Select "View My Scheme Participant Profiles" and select the Profile to edit.



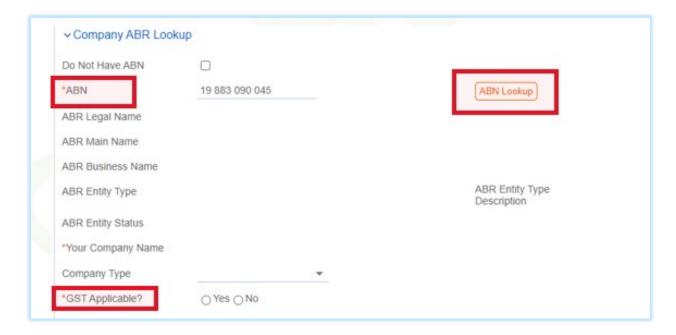
• Select the Participant Profile to edit.



Fill in the Company Registered Office. All required fields are marked with *.

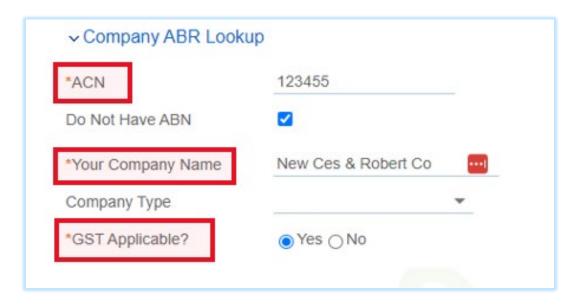


- Fill in Company ABR lookup either:
 - o By ABN
 - Enter the ABN Number.
 - Click the "ABN Lookup" Button. "Your Company Name" will be prepopulated when a match is found.
 - Tick "GST Applicable?" Yes or No box.



- o Or ACN
 - Tick "Do Not Have ABN" box. See diagram in the previous section.
 - Enter "ACN number".
 - Enter "Your Company Name".

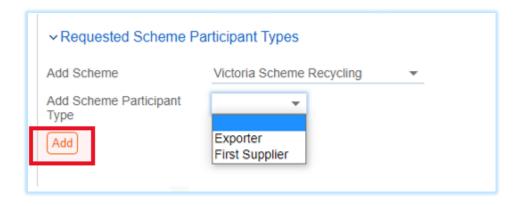
■ Tick "GST Applicable?" Yes or No box.



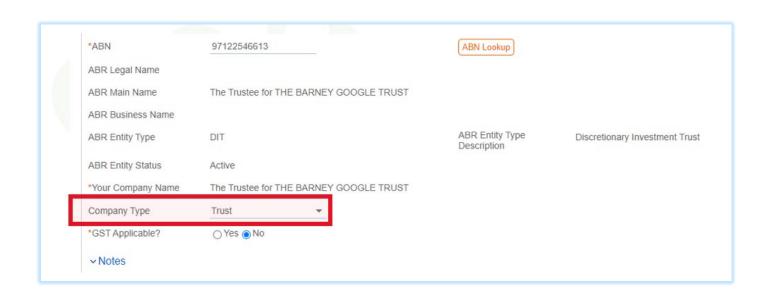
Click Save Draft.



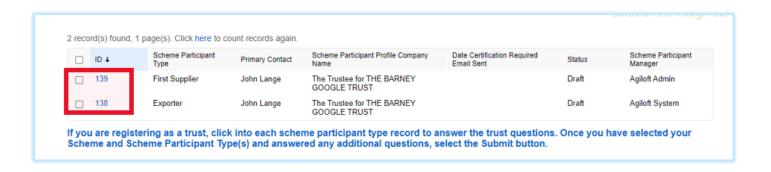
- Enter Requested Scheme Participant Types.
 - Select "Add Scheme" from the available list.
 - Select "Add Scheme Participant Type" from the available list.
 - o Click "Add" button to add the Scheme Participant Type to the Profile.
 - o Repeat the process to add additional Scheme Participant Type to the Profile.



• IF "Company Type" = Trust.
These additional steps are required for "Company Type = Trust".

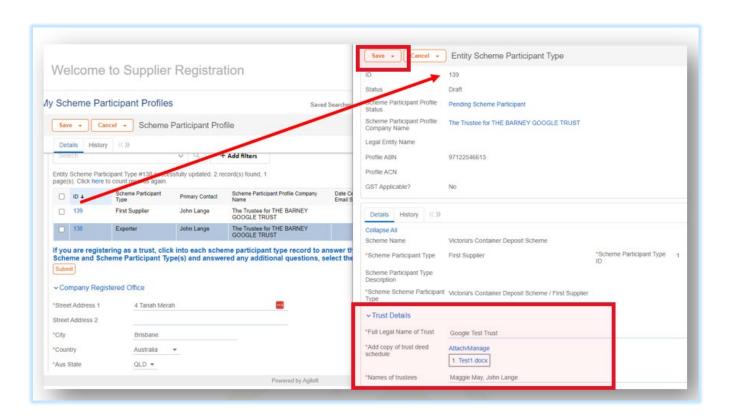


Click into each scheme participant type.



Enter Trust Details:

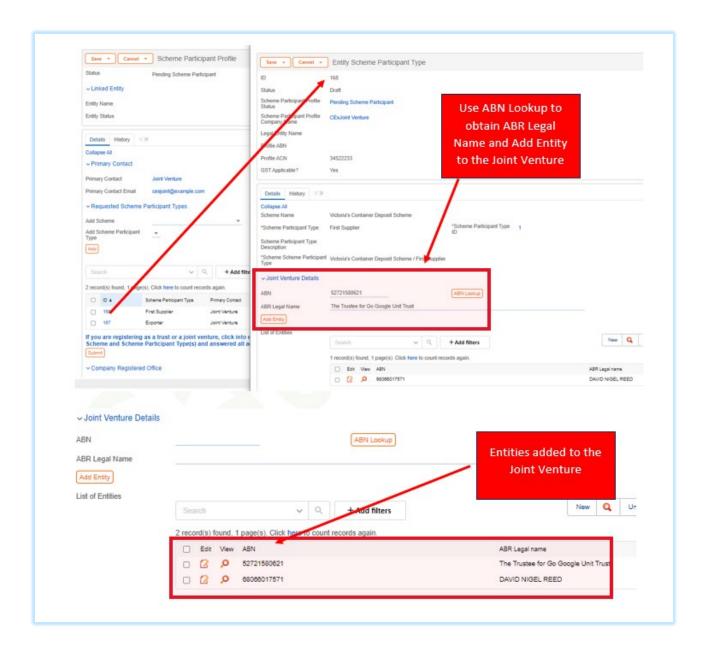
- Full Legal Name of Trust.
- Add copy of trust deed schedule.
- Name of trustees.
- Click "Save" button.



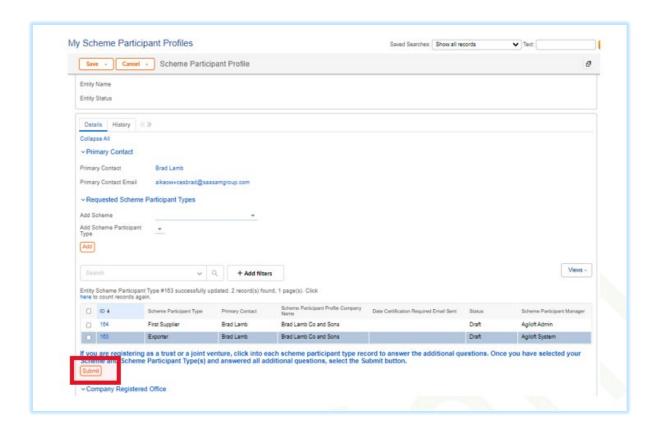
- o Repeat the last 2 steps for all scheme participant types.
- IF "Company Type" = Joint Venture.

These additional steps are required for "Company Type = Joint Venture".

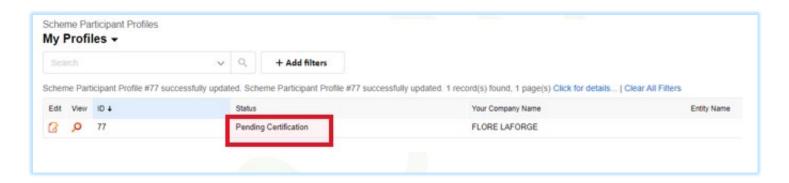
- Click into each scheme participant type.
- Enter Joint Venture Details. Repeat these steps for all the entity that are in the Joint Venture.
 - Enter ABN Number
 - Click "ABN Lookup", to populate the ABR Legal Name field,
 - Click "Add Entity" to add entity to the "Joint Venture."
- Click "Save" button.



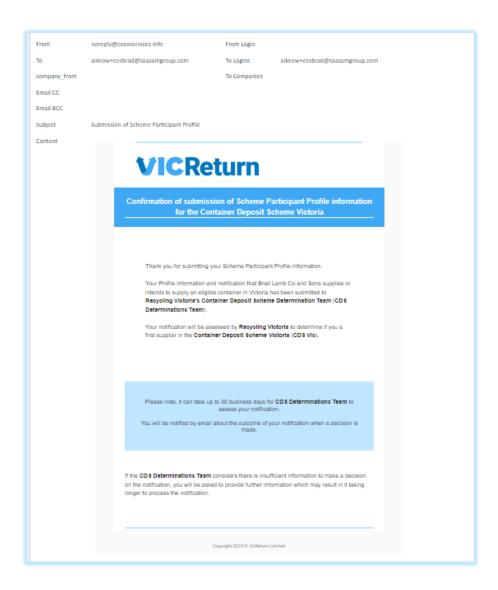
• Click "Submit" button when all the Scheme Participant Type have been added.



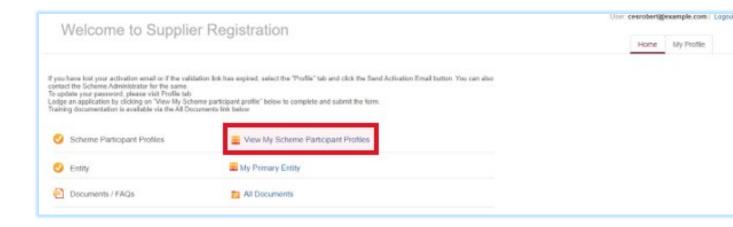
The Scheme Participant Profile record status is set to "Pending Certification". Email will be sent to "State
Department Contact Team" for the Profile to be reviewed and certified by the "State Department Contact
Team".



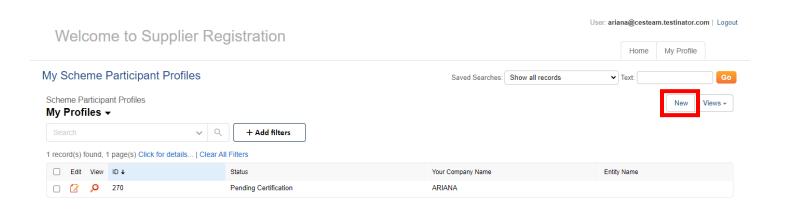
 An email is sent to Authorized Contact to inform them that their Scheme Participant Application has been forwarded to the State Department Contact Team for certification.



• IF one Authorized Contact is responsible for multiple entities, return to "View My Scheme Participant Profiles"



• Select the "New" button



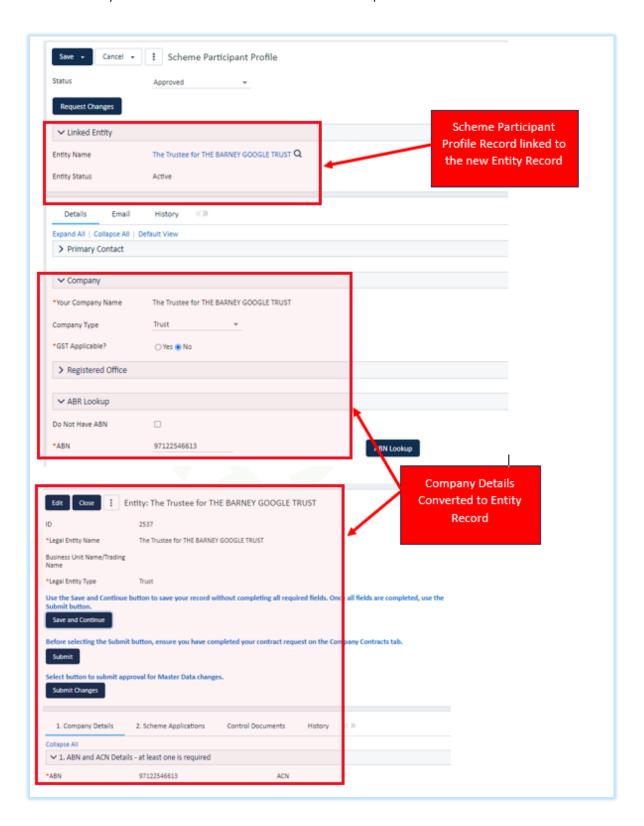
• A new Scheme Participant Profile opens. Complete all steps Scheme Participant Profile steps as outlined above for the new entity. When you "Save", the "My Scheme Participant Profiles" table will update with an additional record.

1.5 Certifying "Entity Scheme Participant Type"

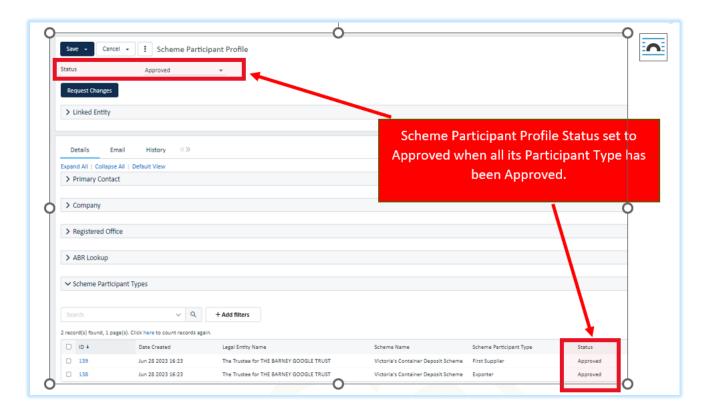
All "Scheme Participant Type" belonging to the Participant Profile will be certified by the "State Department Contact Team". When the record is certified the Authorised Contact will be notified by e-mail, including a copy of the Certification Certificate. After receiving this notification, the Authorised Contact may proceed to complete Entity data and create and submit a Scheme Application, according to the following sections. Note that if you are the Authorized Contact for multiple entities, each Entity Scheme Participant Type will need to be certified individually.

1.6 When a Scheme Participant Type is approved.

• When **any** of the Scheme Participant Type is approved, the Company details are converted to Entity Record and the Entity Record is linked back to the Scheme Participant Profile record.



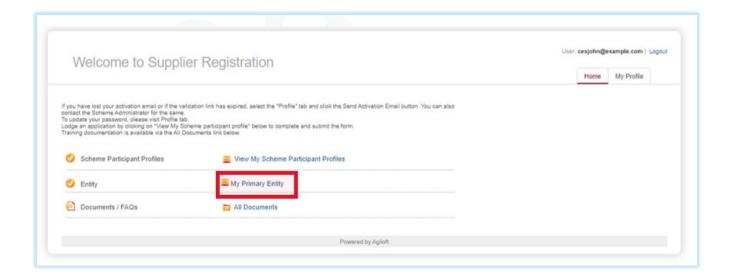
• Scheme Participant Profile status is set to "Approved" when all its Scheme Participant Type are Approved.



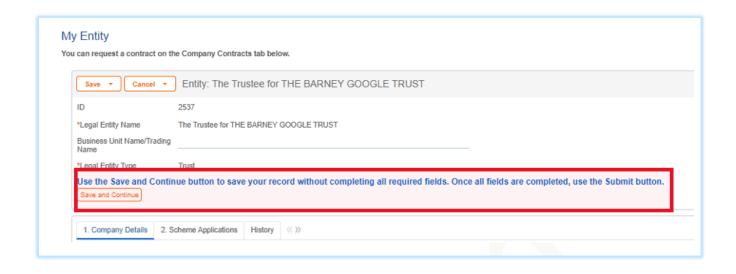
1.7 Completing Entity Details by the Authorized Contact.

Once the Entity record is created, the participant (**Authorized Contact**) can add additional Locations and Contacts and the Company Details and Complete the Scheme Application.

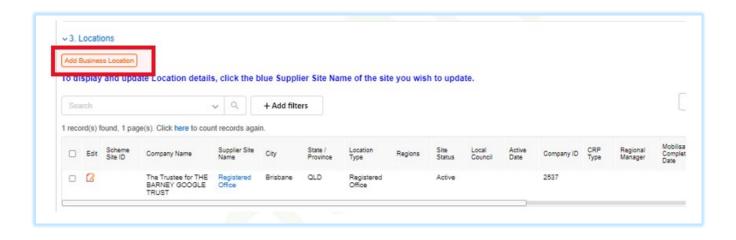
Authorized Contact login to the CES Supplier Registration Application. Click on "MY Primary Entity".



• At any point, use the "Save and Continue" button to save your record without completing all required fields. Only click the "Submit" button when all fields are completed.



- In Section "3. Locations": Add Additional Location.
 - o Click on the "Add Business Location" button, to add additional Locations.



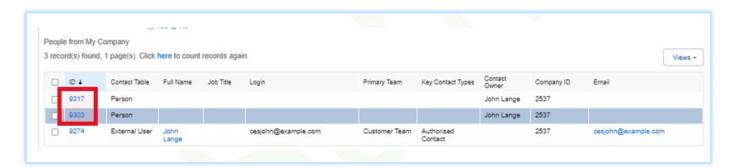
- In Section "5. All Company Contacts and Signatories", fill in the sole director field and add additional company contacts.
 - o Fill in the Sole Director field.



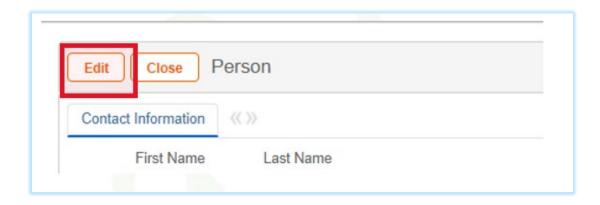
- o Add Additional Company Contact. Repeat these steps for all additional Company Contacts.
 - Click the "Add Company Contact" button.



• A "Person's" record with minimal details is created at this stage. Click "Person ID" to open the person record.



Click the "Edit" button to edit the record.



• Fill in Contact Information.

First Name

Last Name

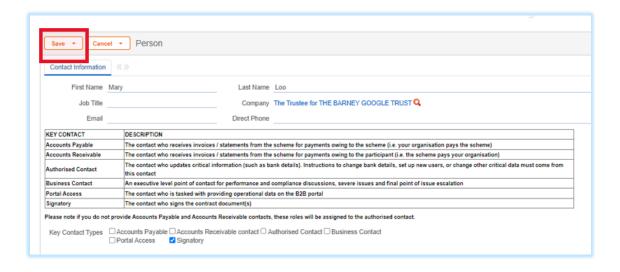
Job Title

Email

Direct Phone

Select Key Contact Types for this Contact.

- Click "Save" button to save the changes.
- Click "Close" button when record is saved.

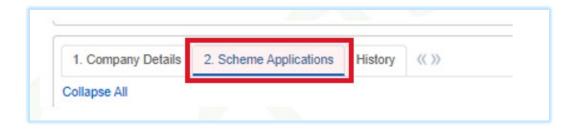


Additional Contacts added to the Entity.

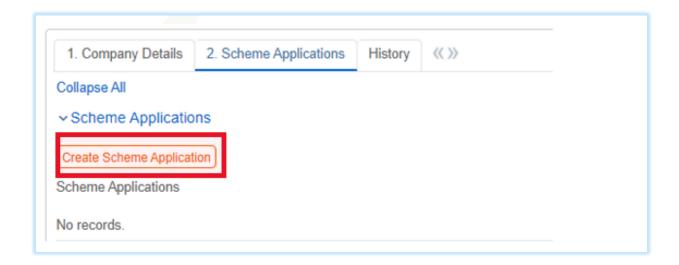


• Click tab "2. Scheme Applications" tab. These steps are repeated if the Entity has more than one Scheme Application.

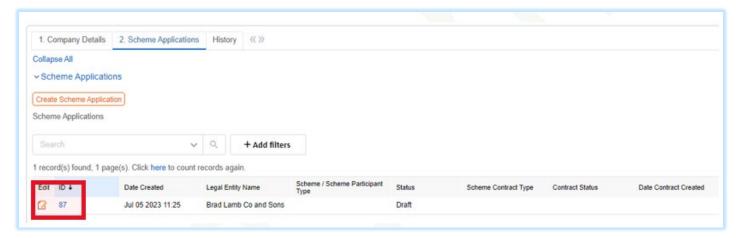
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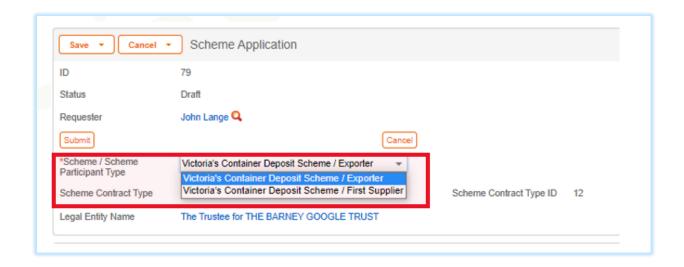
o Click "Create Scheme Application" button.



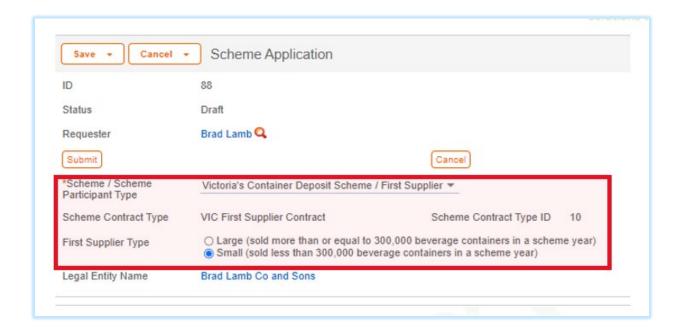
Select the scheme to edit.



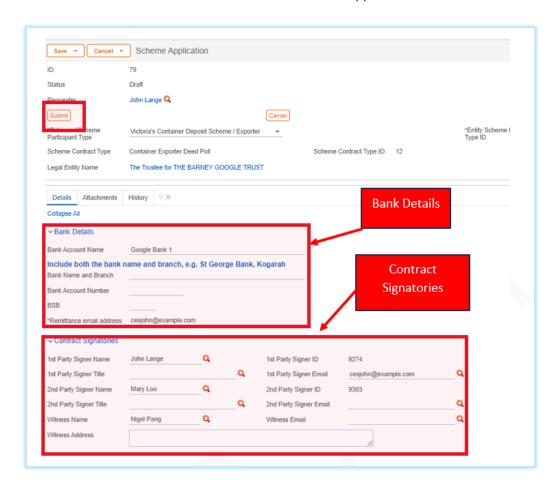
o Select Scheme/Scheme Participant Type.



• If Scheme /Scheme Participant Type is First Supplier, select First Supplier Type.



- o Enter Scheme Application details.
 - Fill in Bank Details:
 - Bank Account Name
 - Bank Name and Branch
 - Bank Account Number
 - BSB
 - Remittance email address
 - Fill in Contact Signatories:
 - 1st Party Details
 - 2nd Party Details
 - Witness Details
 - Click "Submit" button to save and add Scheme Application record.



o Entity Scheme Application submitted.

