WA Relationship Authorisation Manager User Guide

GOVERNMENT OF
WESTERN AUSTRALIA

Inviting a person 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.

When you are an administrator for any of the above entities, you can invite a person to act on behalf of that entity ("a **representative**"), either as another administrator ("**service administrator**") or as a standard user ("**service user**").

If you are not an administrator and require administrator rights, you should submit a request and wait until your request is approved. Please be aware that you may be asked to provide proof that you are allowed to act on behalf of the requested business

If you require another person act on behalf of yourself, please refer to the instructions titled, "Inviting a person to act on your behalf".

The person you are inviting to be a representative will be emailed an invitation with a code, of which they 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.
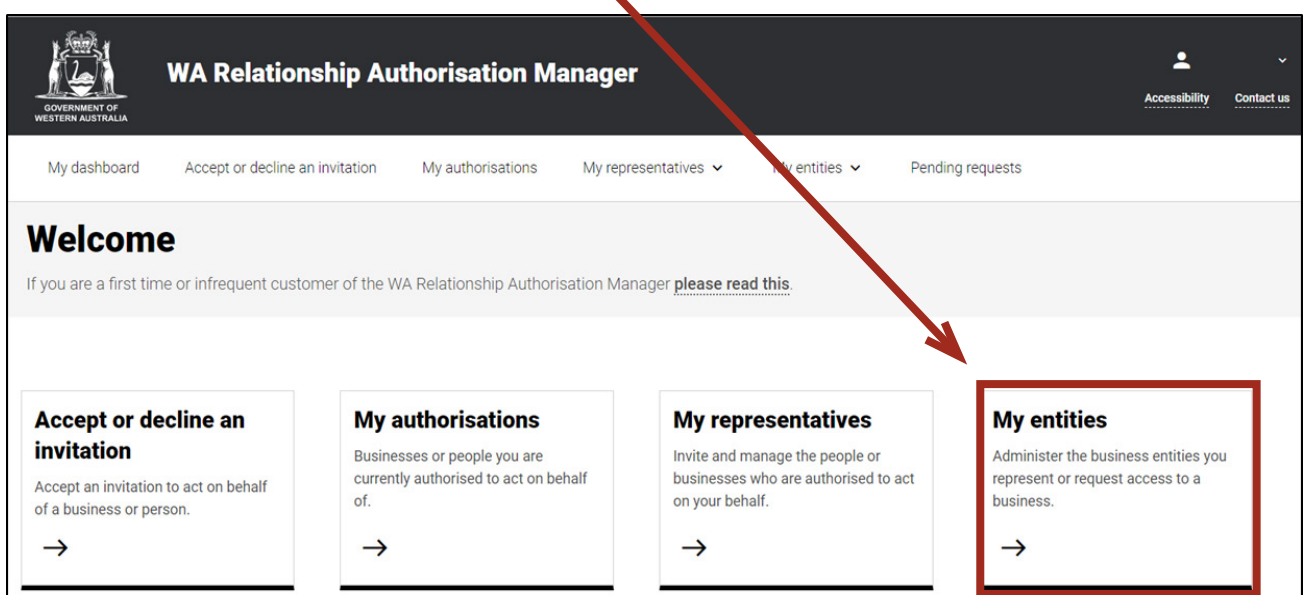
STEP 1.

How to invite another person to act on behalf of an entity

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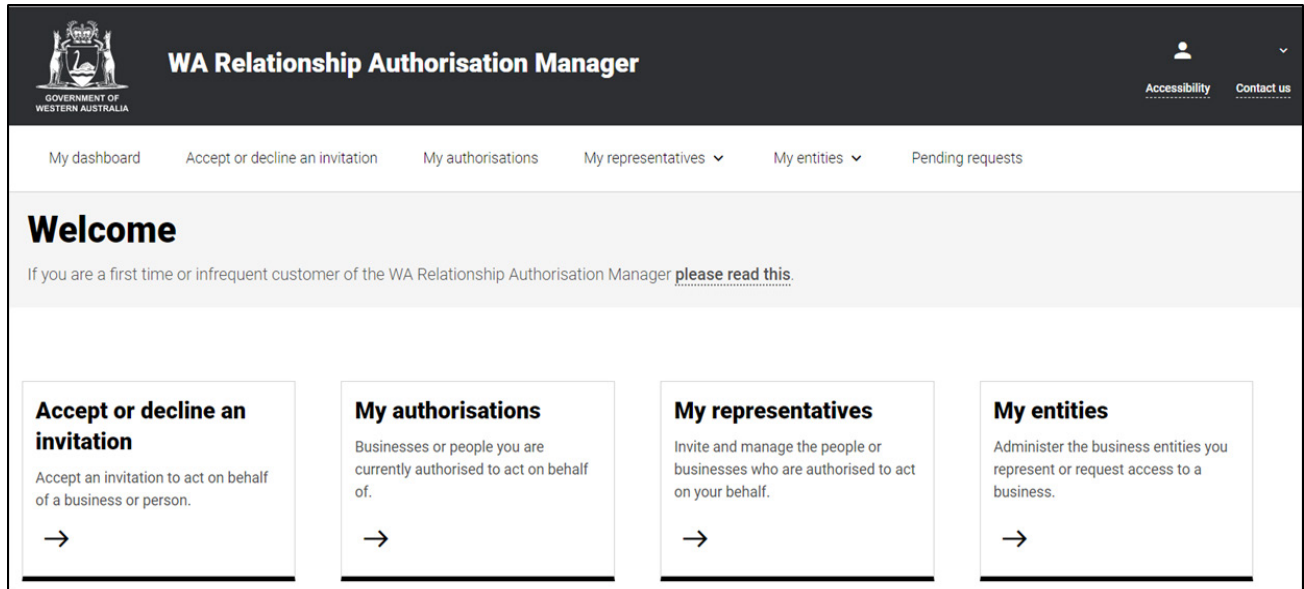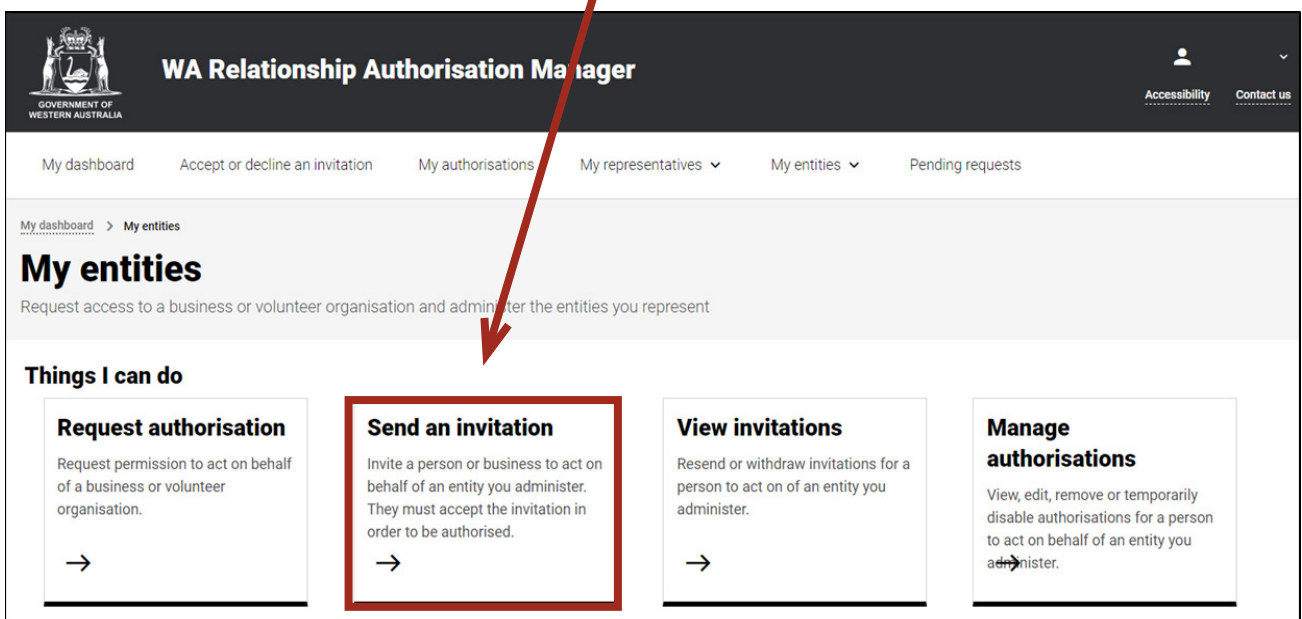

STEP 2.

Click on the "My entities" section tab.

STEP 3.

Click on the "Send an invitation" section tab.

> **NOTE:** If the "Send an invitation" section tab is not visible on this page, then you have not been authorised to administer any entities. If you require administrator rights, you will need to submit a request and wait until the request is approved.

STEP 4.

You should now be able to see the "Send an invitation" page. First select the entity you are inviting the person to represent.

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

> **NOTE:** An IARN is the unique identifier assigned to an entity in WA Associations Online.
>
> The list of entities will be restricted to those entities you are authorised to administer. You can click in the box to view a list of those entities.

STEP 4. cont...

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

From the displayed list, select the correct entity you are searching for. 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 on the right of the "Other names".
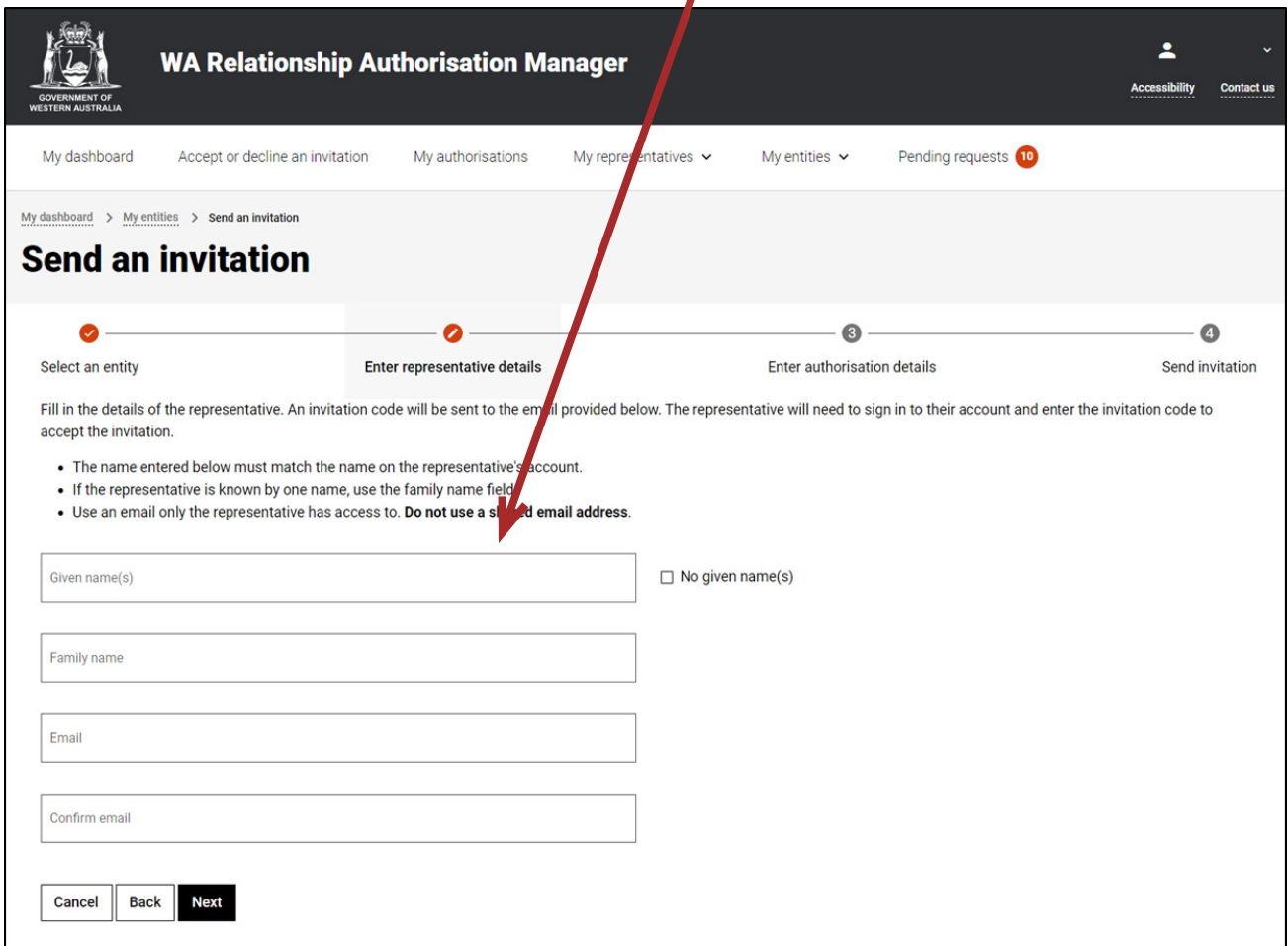
If your chosen entity is correct, click on the "Next" button, located to the bottom left of the page.

STEP 5.

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

WARAM User Guide – Inviting a person to act on behalf of a business.

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

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 behalf of the business.

- Authorisation type: If the representative is 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.

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

STEP 7.

The final step prior to sending an invitation is to confirm the details of the invitation and complete the declaration.

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

STEP 7. cont...

If 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".

Next, click on the "Send" button.

> **NOTE:** At this stage in the process you also have several other choices available:
>
> - Should you not agree with the declaration, click on the "Cancel" button and go to Step 9.
>
> - 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 9.

WA Relationship Authorisation Manager

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Accessibility | Contact us

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

✓ Select an entity ———— ✓ Enter representative details ———— ✓ Enter authorisation details ———— ✏ Send invitation

Review and confirm invitation details

Entity ❓

Current legal name	**ACN**	**Representative** ❓	
		Name	**Email**
			@

Other names associated with the entity

Authorisation details ❓

Service	**Authorisation type**	**Start date**	**End date**
	Service Administrator	08 November 2022	None

ℹ An invitation code will be sent to .   at   @   l. 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

[Cancel] [Back] [Send]

STEP 8.

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. Next, click on the "Continue" button, located at the bottom of the page.
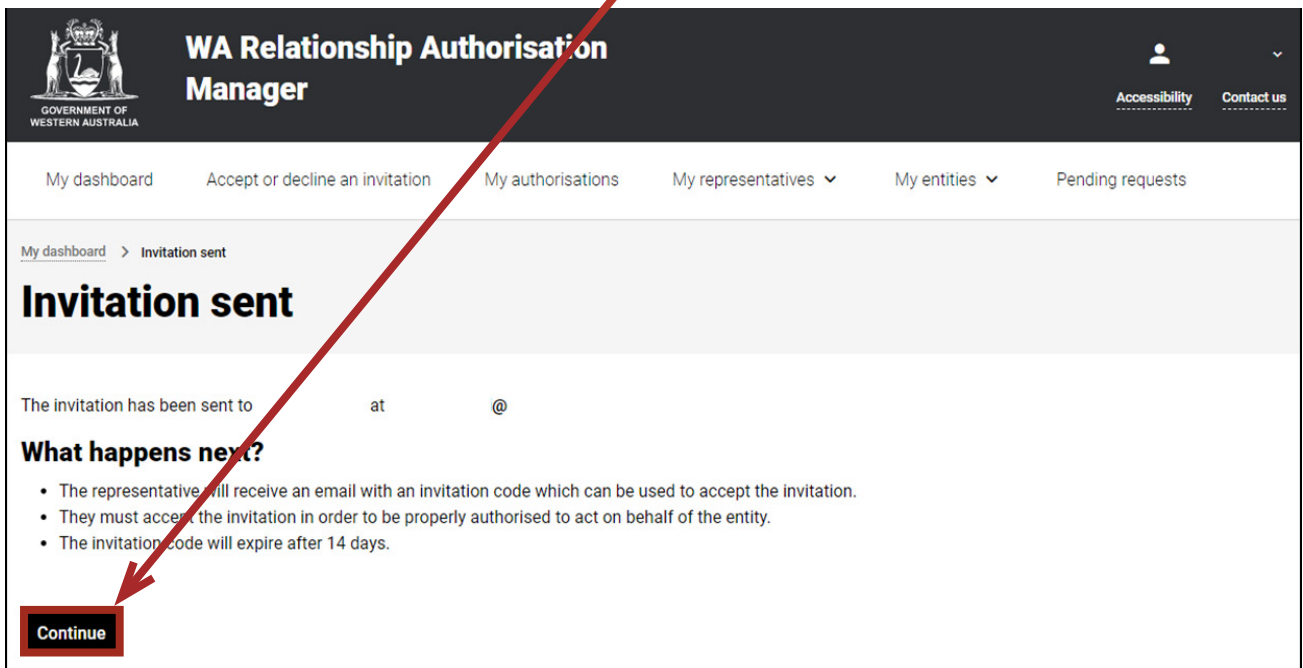
NOTE: As described under the heading "What happens next" on the "Invitation sent" page, your nominated representative will be sent an email invitation code for accepting the invitation. Once accepted, the representative may act on behalf of the nominated entity. This invitation code will expire after 14 days.
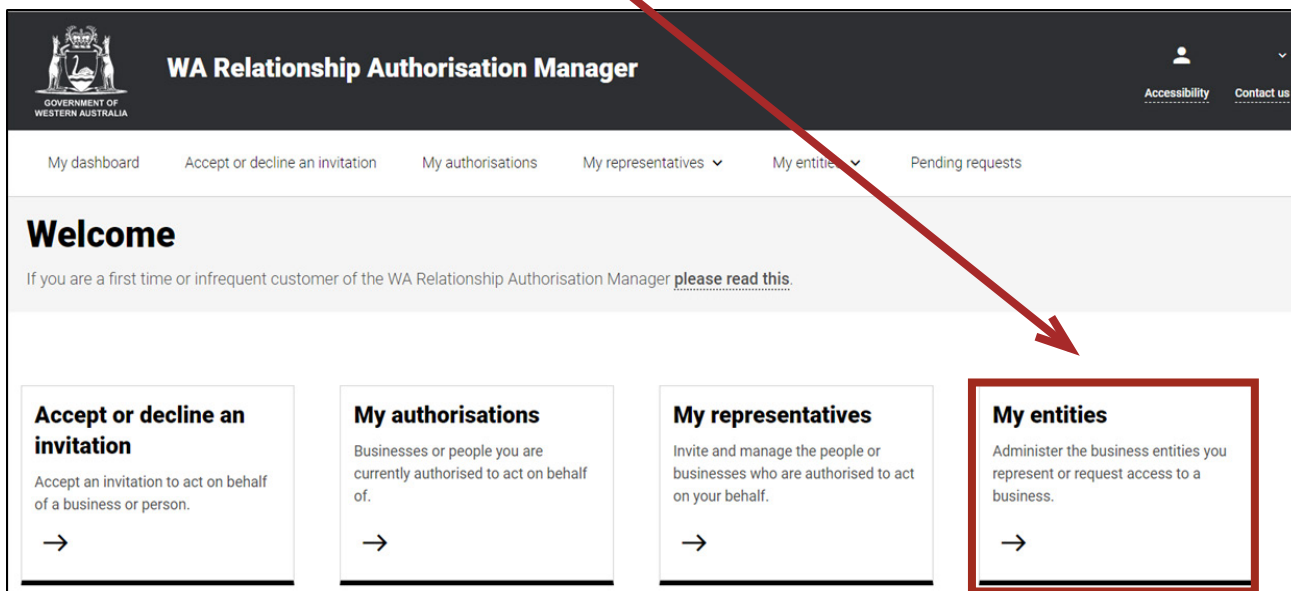
STEP 9.

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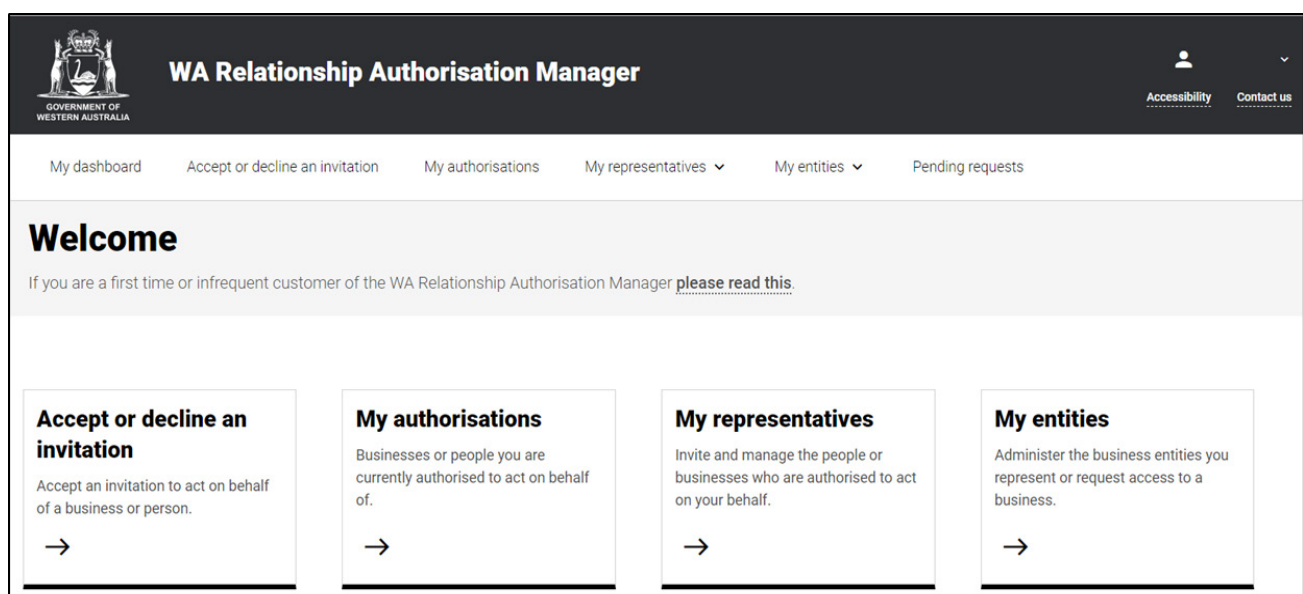
NOTE: The invitation will be visible from the "View invitations" section tab which can be found under the "My entities" dropdown menu item or section tab on the "My dashboard" / "Welcome" page. From this area, you can view details of previously sent invitations, resend an invitation or withdraw an invitation.

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.
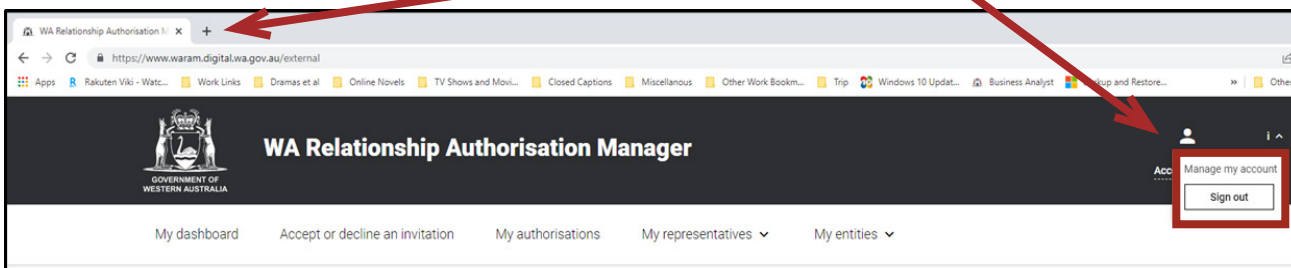
This completes the step-by-step instructions.

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.