



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 to represent you ("a representative"), you will be required to sign in using an account against which you have already verified your identity. This restriction is a protection against identity theft and fraud.

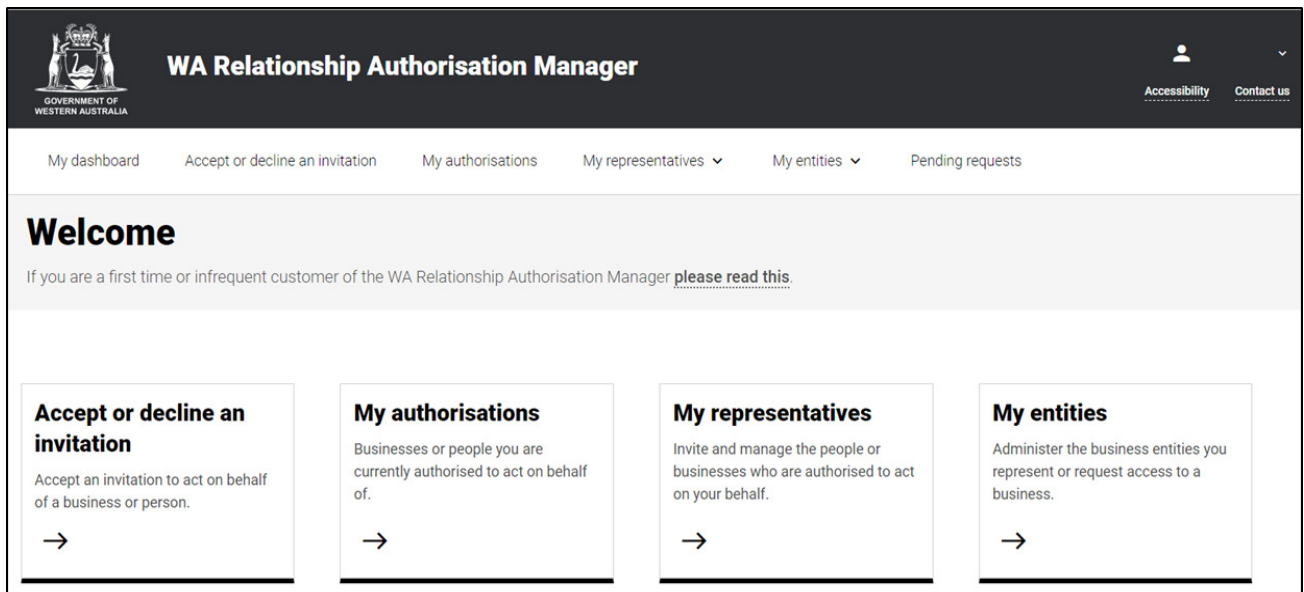
The person you are inviting to be a representative will be emailed an invitation with a code, of which they have 14 days to sign in and enter the code to accept the invitation.

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.

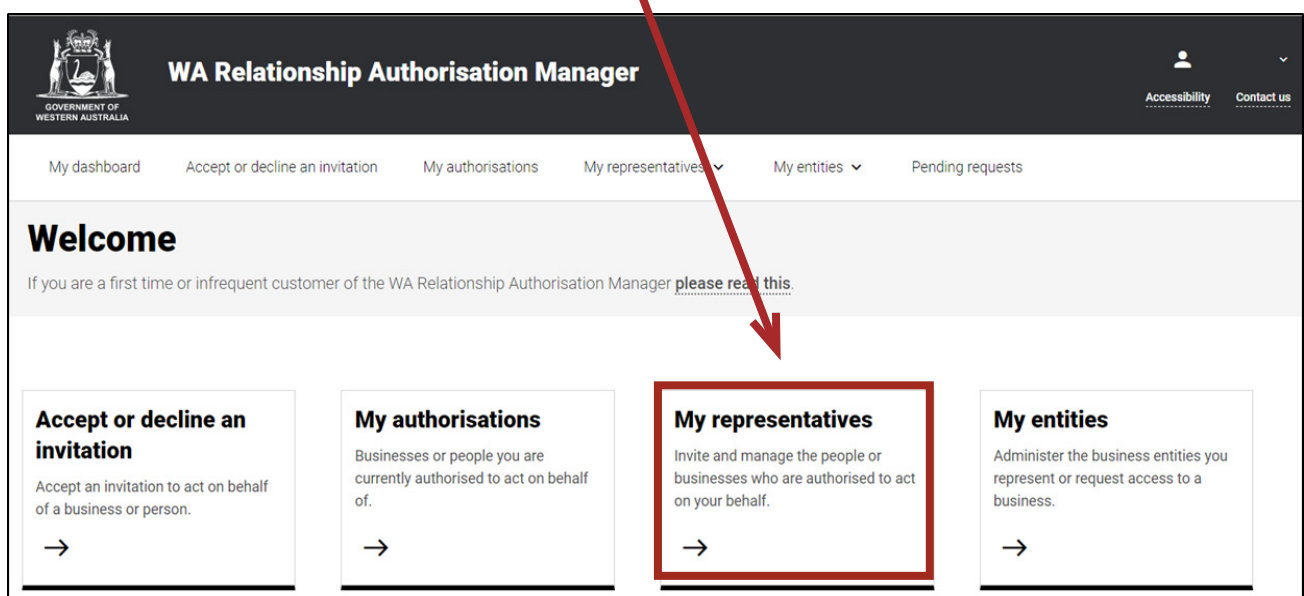
How to invite another person to act on your behalf

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.

The screenshot shows the 'WA Relationship Authorisation Manager' interface. The header includes the Government of Western Australia logo and the title 'WA Relationship Authorisation Manager'. A navigation bar contains links for 'My dashboard', 'Accept or decline an invitation', 'My authorisations', 'My representatives', 'My entities', and 'Pending requests'. The main content area is titled 'My representatives' and includes a sub-header 'Things I can do'. Three cards are displayed: 'Send an invitation' (highlighted with a red box and arrow), 'View invitations', and 'Manage authorisations'. Each card contains a brief description and a right-pointing arrow.

NOTE: If you have not signed in using an account against which you have already verified identity, you will not be permitted to continue and will be taken to a page with instructions on how to proceed.

The screenshot shows the same 'WA Relationship Authorisation Manager' interface, but with a prominent warning message. The message is titled 'PLEASE READ' and states: 'In order to manage your representatives i.e. people who can act on your behalf, you need to first verify your identity. This means you must sign in using an account where you have proven your digital identity.' It then lists seven steps for verification: 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 another account". 5. In the WA Identity Exchange, select "Digital Identity". 6. Choose the digital identity you wish to use. 7. Sign back in using your new verified digital identity. The message concludes with 'Alternatively please contact us for assistance.'

STEP 4.

You should now be able to see the “Send an invitation” page. Next, read the instructions and then fill out the details as requested on this page.

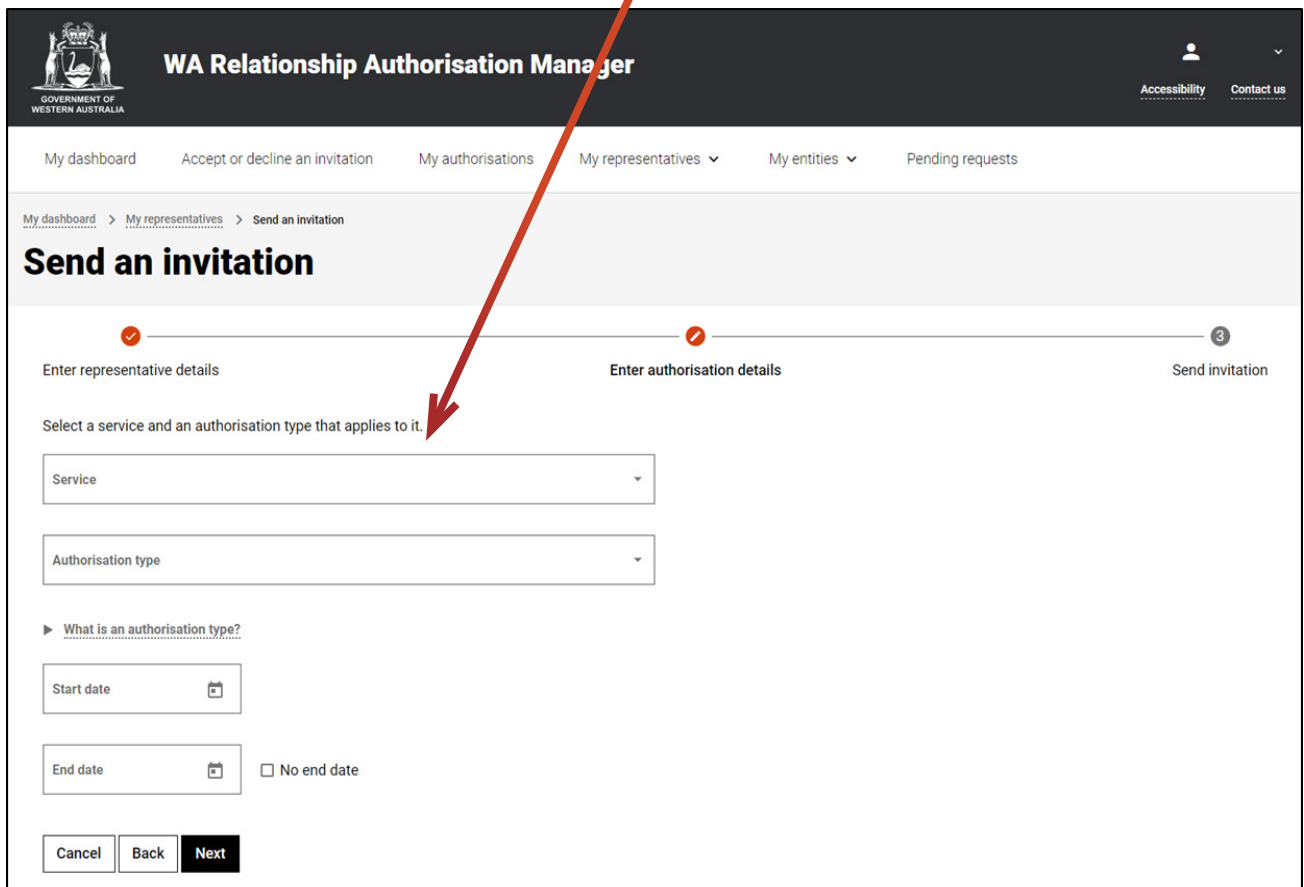
The screenshot shows the 'Send an invitation' page in the WA Relationship Authorisation Manager. The page has a dark header with the logo and title. Below the header is a navigation bar with links: 'My dashboard', 'Accept or decline an invitation', 'My authorisations', 'My representatives', 'My entities', and 'Pending requests'. The main content area has a breadcrumb trail: 'My dashboard > My representatives > Send an invitation'. The title 'Send an invitation' is prominently displayed. Below the title is a progress indicator with three steps: 1. Enter representative details (active), 2. Enter authorisation details, and 3. Send invitation. The instructions state: '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.' A list of instructions follows: 'The name entered below must match the name on the recipient's account.', 'If the recipient 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.' The form fields are: 'Given name(s)' (with a 'No given name(s)' checkbox), 'Family name', 'Email', and 'Confirm email'. At the bottom are 'Cancel' and 'Next' buttons. A red arrow points from the top right towards the 'Given name(s)' field.

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

This screenshot is identical to the one above, showing the 'Send an invitation' page. In this version, a red arrow points from the top right towards the 'Next' button at the bottom left of the form.

STEP 5.

Next enter the authorisation details for the invitation.



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 secondary navigation bar with links: 'My dashboard', 'Accept or decline an invitation', 'My authorisations', 'My representatives', 'My entities', and 'Pending requests'. The main content area has a breadcrumb trail: 'My dashboard > My representatives > Send an invitation'. The title 'Send an invitation' is prominently displayed. A progress bar below the title shows three steps: 'Enter representative details' (completed with a red checkmark), 'Enter authorisation details' (current step, indicated by a red circle with a slash), and 'Send invitation' (pending, indicated by a red circle with a number 3). A red arrow points from the text above to the 'Enter authorisation details' step. Below the progress bar, the text reads 'Select a service and an authorisation type that applies to it.' There are two dropdown menus: 'Service' and 'Authorisation type'. Below these is a link 'What is an authorisation type?'. There are two date input fields: 'Start date' and 'End date', each with a calendar icon. A checkbox labeled 'No end date' is next to the 'End date' field. At the bottom, there are three buttons: 'Cancel', 'Back', and 'Next'.

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

- Service: The online service the representative will be accessing on your behalf.
- 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.

STEP 5. cont...

The screenshot shows the 'Send an invitation' page in the WA Relationship Authorisation Manager. The page has a dark header with the WA Government logo and the title 'WA Relationship Authorisation Manager'. Below the header is a navigation bar with links: 'My dashboard', 'Accept or decline an invitation', 'My authorisations', 'My representatives', 'My entities', and 'Pending requests'. The main content area has a breadcrumb trail: 'My dashboard > My representatives > Send an invitation'. The title 'Send an invitation' is prominently displayed. Below the title is a progress indicator with three steps: 'Enter representative details' (completed), 'Enter authorisation details' (current step), and 'Send invitation' (pending). The form includes a dropdown for 'Service' (Environment Online) and 'Authorisation type' (Service User). A link 'What is an authorisation type?' is present. There are input fields for 'Start date' (29 Jun 2022) and 'End date' with a checked 'No end date' option. At the bottom, there are three buttons: 'Cancel', 'Back', and 'Next'. A red arrow points from the top of the page down to the 'Next' button.

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

This screenshot is identical to the one above, showing the 'Send an invitation' page. However, a red arrow points from the top of the page down to the 'Next' button at the bottom left, which is now highlighted with a red border. The rest of the page content, including the header, navigation, progress indicator, and form fields, remains the same.

STEP 6.

The final step prior to sending an invitation is to 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 'WA Relationship Authorisation Manager' interface. At the top, there is a navigation bar with the logo and title. Below it, a breadcrumb trail reads 'My dashboard > My representatives > Send an invitation'. The main heading is 'Send an invitation'. A progress bar shows three steps: 'Enter representative details', 'Enter authorisation details', and 'Send invitation', with the first two marked as complete. The 'Review and confirm invitation details' section is highlighted with a red arrow. It contains a table with the following data:

| Entity | | Representative | |
|------------------------------|-----------------------|-----------------|----------|
| Name | | Name | Email |
| Authorisation details | | | |
| Service | Authorisation type | Start date | End date |
| Environment Online | Service Administrator | 26 October 2022 | None |

Below the table, an information box states: 'An invitation code will be sent to [redacted] at [redacted]. The representative will need to sign in to their account and enter the invitation code to accept the invitation.'

The 'Declaration and consent' section follows. It includes a section titled 'I declare that:' with a list of bullet points: '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.', and 'I have reviewed the invitation details and these correctly reflect my intent.' Below this is a checkbox: 'I understand and accept this declaration'. Another section titled 'I consent to:' includes a bullet point: '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.' Below this is a checkbox: 'I understand and consent to the sharing of my personal information'. At the bottom, there are three buttons: 'Cancel', 'Back', and 'Send'.

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”.

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” button.

STEP 6. cont...

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 8.
- 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 8.

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 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 |
| Environment Online | Service Administrator | 26 October 2022 | None |

An invitation code will be sent to [redacted] at [redacted]. 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:

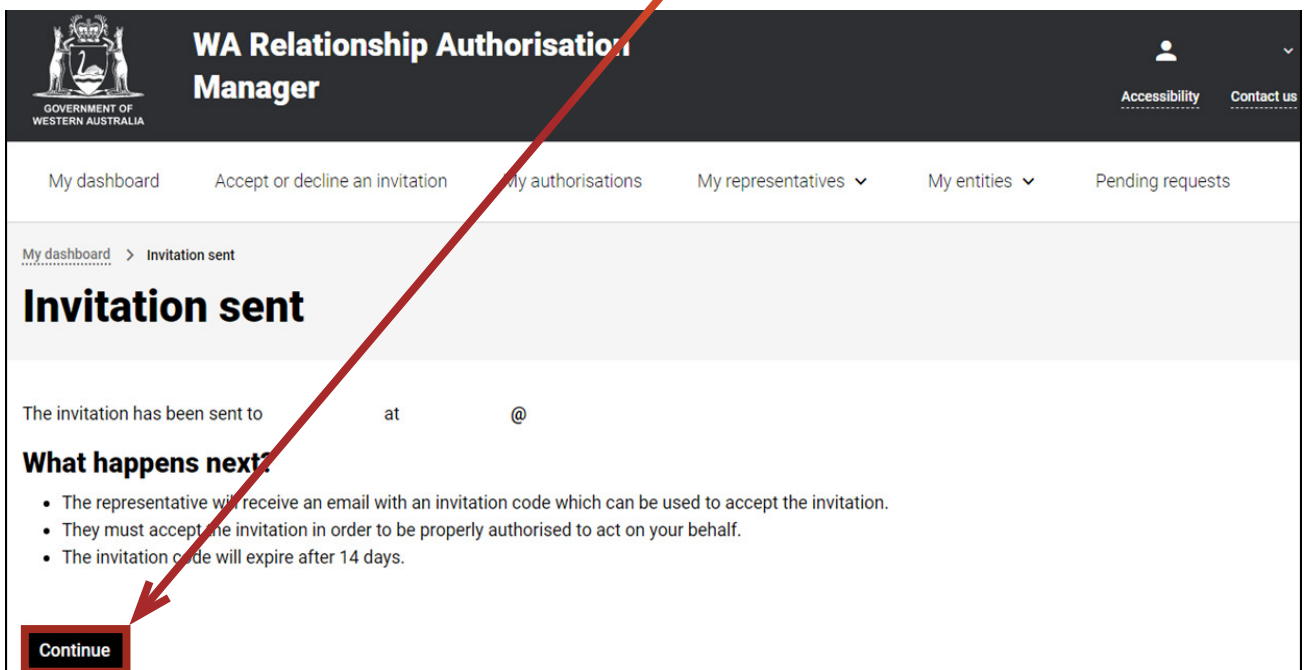
- The sharing of my personal information, including my full name, date of birth and email address, with the service named above in accordance with the [privacy statement](#) when the representative is transacting on my behalf.

I understand and consent to the sharing of my personal information

Cancel | Back | **Send**

STEP 7.

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.

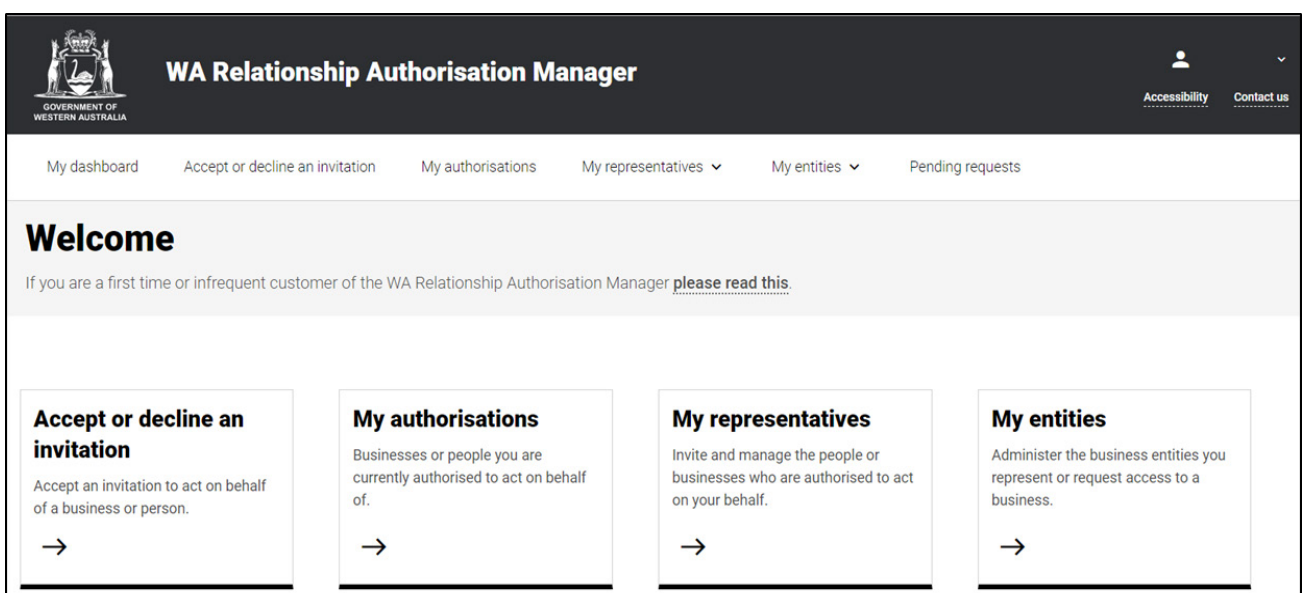


The screenshot shows the 'WA Relationship Authorisation Manager' interface. The header includes the Government of Western Australia logo and the title 'WA Relationship Authorisation Manager'. The navigation menu contains 'My dashboard', 'Accept or decline an invitation', 'My authorisations', 'My representatives', 'My entities', and 'Pending requests'. The main content area is titled 'Invitation sent' and includes a breadcrumb 'My dashboard > Invitation sent'. Below the title, it states 'The invitation has been sent to [redacted] at [redacted]@[redacted]'. A section titled 'What happens next?' lists three bullet points: 'The representative will receive an email with an invitation code which can be used to accept the invitation.', 'They must accept the invitation in order to be properly authorised to act on your behalf.', and 'The invitation code will expire after 14 days.' At the bottom left, there is a red 'Continue' button, which is highlighted by a red arrow pointing from the top right of the page towards it.

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 8.

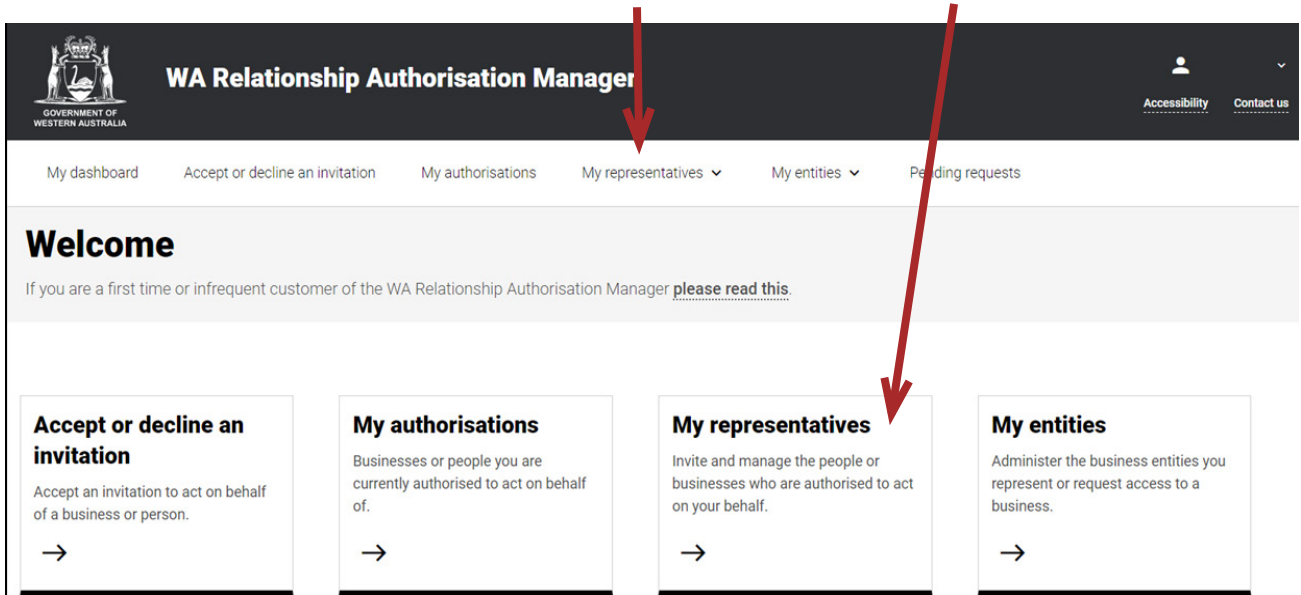
You should now be returned to the “My dashboard” / “Welcome” page.



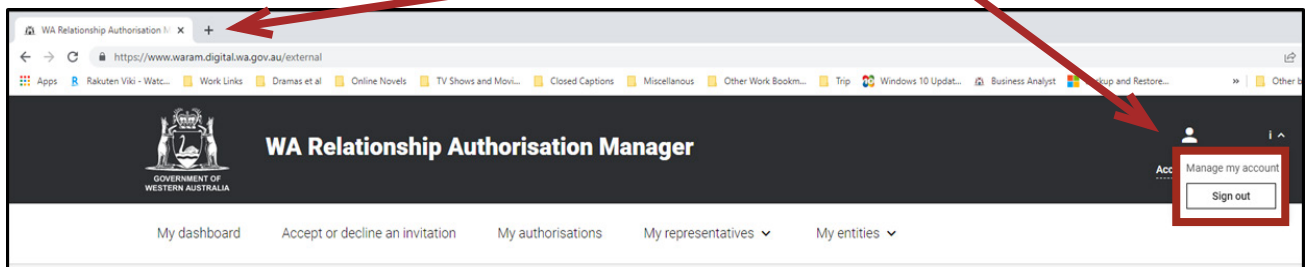
The screenshot shows the 'WA Relationship Authorisation Manager' interface. The header includes the Government of Western Australia logo and the title 'WA Relationship Authorisation Manager'. The navigation menu contains 'My dashboard', 'Accept or decline an invitation', 'My authorisations', 'My representatives', 'My entities', and 'Pending requests'. The main content area is titled 'Welcome' and includes a breadcrumb 'My dashboard > Welcome'. Below the title, it states 'If you are a first time or infrequent customer of the WA Relationship Authorisation Manager [please read this](#).' Below this, there are four cards, each with a title and a right-pointing arrow: '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.), and 'My entities' (Administer the business entities you represent or request access to a business.).

STEP 8. cont...

NOTE: 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; or
2. the “Need assistance?” section in the WARAM footer.