NAVIGATING
THE PORTAL

Climate
Active

Contents

Directory

This guide will assist you to navigate the Portal.

AUTHORISING
ACCESS

1.1
Creating a Digital Identity

myGovID is the Australian Government's Digital Identity app.
*For more information visit **www.mygovid.gov.au/setup***

1. Download the myGovID app to your compatible smart device. Open the app, select **Create a myGovID.** Once you have read the information, select **Start Now**. **Accept** the Terms of Use.

2. Enter a personal email address and select **Get Code**.

3. Refer to your email inbox to retrieve your unique code. Enter this code into the next page and select **Next**.

4 Enter your personal details into the requested fields and select **Done**.

5. Create a password. It needs to be 10+ characters and include uppercase, lowercase and a number/symbol. Then select **Next**.

6. To access the portal you will need at least a Standard identity strength. You will be required to verify two documents to confirm your identification.

7. Your myGovID is now set up.

Authorising Access

1.2
Setting Up Authorisations

Please note: these directions are for your business's principal authority (a principal authority is a person responsible for the business).

*Section 1.2 assumes that the principal authority of the business has already linked their Digital Identity, such as myGovID, to their business using Relationship Authorisation Manager (RAM). If you are the principal authority and have not done this, how you link your business will depend on your circumstances. For more information regarding setting up authorisations, visit **info.authorisationmanager.gov.au/principal-authority.***

1. **Login to RAM**. To authorise your staff member to act on behalf of the company, select **Manage authorisations**, then select **the business** you would like to add an authorisation to and finally select **Add new user**.

   Note: The ABN you are providing access to should match the ABN that is applying/has applied for Climate Active certification, or currently holds Climate Active certification(s) as outlined in your latest Notice of Certification letter.

2. Select the users 'Representative type' of **Standard user**, as this is the minimum identity strength required to access the Portal.

3. Ask your staff member for their **full name** as entered in myGovID and their **business email address** to receive their authorisation code. Enter these details into the fields on the next page, then select **Continue.**

4. On the following page, select **No** for authorisation administrator and Machine credential administrator. Enter appropriate **start and end date** details, then select **Continue**.

5. Locate the **Department of Industry, Science, Energy and Resources** from the list on the following page. Select **Full** for level of access, then click **Continue**.

6. On the next page, read the declaration. Then check the **I understand and accept this declaration** option and click **Submit**.

7. Select **Continue** and inform the staff member that they have been authorised and will receive an authorisation code which they need to accept in RAM **within 7 days**. Once accepted they'll be able to login to the Climate Active portal.

1.3
Accepting an Authorisation

This section is for authorised users. An authorised user is someone who acts on behalf of the business (such as a staff member). A principal authority needs to authorise you before you can act on behalf of the business in the Portal (see section 1.2). Once you receive your authorisation request, complete the following steps.

For more information visit - **info.authorisationmanager.gov.au/authorised-users-and-administrator**

1. Go to **authorisationmanager.gov.au** and select **Login with myGovID**.

2. Enter your email address used for myGovID and select **Login**.

3. A 4-digit code will appear on the login screen. Log into your myGovID app using your 10-character password, fingerprint or face. You will be prompted to enter or accept the 4-digit code in your **myGovID app**.

4.   Enter your authorisation code into the required field on the following page. Select **Submit**.

5.   You will be taken to your **Authorisation Summary**. Ensure that you review all information and read the declaration. Tick the declaration box and select **Accept**.

6.   You should now have authority to act on behalf of your business. You can now log into the Portal.

2.0

LOGGING
IN

2.0
Logging In

*If section **1.0 Authorising Access** has been sucessfully completed, you should have set up your myGovID and be authorised to act on behalf of the business. Please ensure you have your myGovID app and email ready.*

1. Go to **https://portal.climateactive.org.au/.** You will be taken to the Welcome page of the Climate Active Portal. Select **Already have a Digital Identity? Log in.**

2. On the following page, you will be asked to select an identity provider. Locate **myGovID** and select **Select myGovID**.

1.

2.

3.
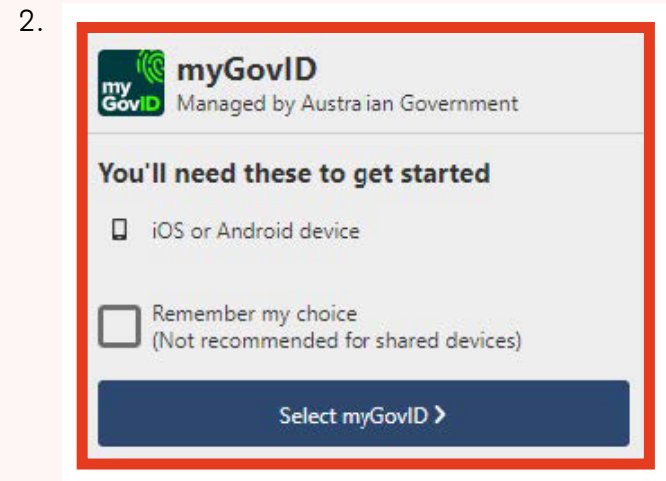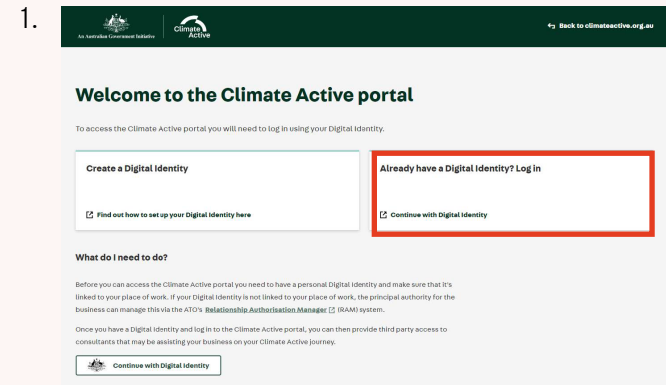
3. You will be taken to the myGovID login page. Locate the input bar underneath **Already have the myGovID app?** and enter your email. A 4-digit code will appear on the login screen.

4. Log into your myGovID app using your 10-character password, fingerprint or face. You will then be prompted to enter or accept the 4-digit-code in your myGovID app.

5. Go back to your browser to provide consent to sharing the information outlined on screen. Only a small amount of your information is passed to the service you want to access. Usually this is limited to your name, date of birth and contact details.

6. You are now logged in.

Note: *If you have been authorised access to more than one business via RAM, you will need to nominate the correct business from a list to continue logging into the Portal.*

3.0
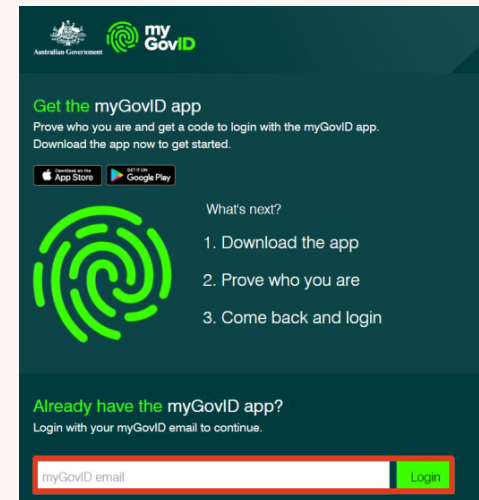
TERMS & CONDITIONS

3.0
Terms & Conditions

Prior to accessing the full functionality of the Portal, you will need to read and accept the **Terms of use**, including the **Privacy Collection Statement.**

For further information, you can refer to the **Department's Privacy Policy**.

If you accept the **Terms of use**, please select **Agree & continue**. You will then be directed to set up your Business Account. Alternatively, you may close your web browser if you do not wish to continue.

Note: *While Climate Active sits within the Department of Climate Change, Energy, the Environment and Water's portfolio, the Portal is currently hosted by the Department of Industry, Science and Resources. As such the Portal Terms & Conditions are in-line with the Department of Industry, Science and Resources' Privacy Policy.*

Welcome, ABC451 Pvt Ltd

Before you begin, please read and agree to the Climate Active Portal terms of use.

Terms of use

Privacy Collection Statement

The Department of Industry, Science, Energy and Resources (the Department) is bound by the Australian Privacy Principles (APPs) outlined in Schedule 1 of the Privacy Act 988 (Cth) (Privacy Act) which regulates how entities may collect, use, disclose and store personal information.

The Department will collect from all submitted forms, personal information including the name, address, email address and telephone numbers of companies applying for Climate Active carbon neutral certification. This is for the purposes of carrying out its functions and to comply with legislative requirements including for registration, assessing submitted applications and reporting documents against the Climate Active Carbon Neutral Standard and providing advice. This information may also be disclosed to and accessed by Departmental staff within the Department for the purposes of administering the Climate Active initiative, evaluating and improving the efficient administration of the initiative, and informing policy development. If the required information is not provided, the Department will be unable to process your Climate Active carbon neutral application and certification reporting.

Other than the circumstances mentioned above, the Department will not disclose your personal information to third parties or disclose the information to overseas recipients.

Personal information obtained will be stored and held in accordance with the Department's obligations under the Archives Act 1983 (Cth) and will only be used and disclosed for the purposes outlined and will not be disclosed without your consent, except where authorised or required by law.

For further information, please refer to the Department's Privacy Policy, which can be found at: https://www.industry.gov.au/data-and-publications/privacy-policy [↗]

Please accept the Terms of use to continue. Alternatively, you may close your web browser session if you do not wish to continue.

↩ **Exit portal**

Agree & continue

4.0

SETTING UP A
BUSINESS ACCOUNT

2.

4.1
Providing Business Details

After agreeing to the Terms of use, you will be asked to set up your Business Account. Once your account is set up you will be able to edit these details at any time from your Portal dashboard.

1. Enter the required information pertinent to your business.

Please ensure you have the following information ready:

- *Your business's Trading name (if applicable)*
- *A short description of your business*
- *ANZSIC division*
- *ANZSIC class*
- *Business address*

Select **Save and next.**

2. Enter details for your key contacts.

Please ensure you have the following information ready:

- *Your **primary contact** - the person responsible for liaison between Climate Active and your organisation*
- *Your **formal contact** - signatory to your business's reports, should receive formal correspondence from Climate Active*
- *Your **secondary contact** - alternate contact person to the primary contact (optional)*
- *Your **registered consultant** contact (optional)*

Select **Create Account.**

3. Confirm your account by selecting **Submit**, then **Yes, submit**.

4. Your account is now ready. Select **Go to Dashboard** to get started.

3.

4.

5.
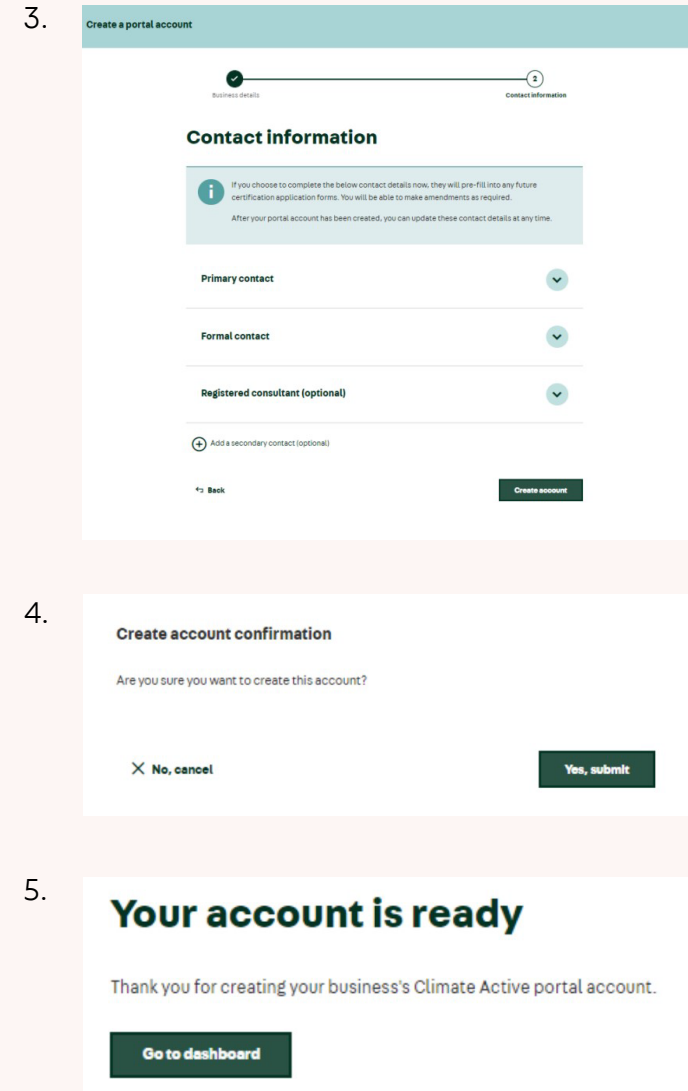
5.0

DASHBOARD

Dashboard

1.

Kira Galindo ⚙
ABC451 Pvt Ltd

Manage business details

Manage contact information

Manage portal access

Sign out

An Australian Government Initiative | Climate Active

Welcome
Kira

Currently managing

ABC451 Pvt Ltd

ABN: 12 300 001 884

2.

Certifications

You don't have any active certifications. Start a new certification below.

[Start new certification]

3.

Quick links

Manage portal access	**Guides & resources**	**Get help with the certification process**
Grant portal access to employees, consultants and auditors for ABC451 Pvt Ltd (ABN: 12 300 001 884).	View the Climate Active Carbon Neutral Standards, Technical Guidance Manual and other resources to assist you with the certification process.	See a list of registered consultants and contact Climate Active.

1   Menu

The menu features your contact name and your business's name, along with the following options:

Manage business details
View and update details pertaining to your business and its operations.

Manage contact information
View and update contact information for your primary and secondary contacts and registered consultant.

Manage portal access
View and update accessibility for employees, consultants and auditors.

Sign out
Log out of the Portal.

2   Certifications

This is where you can start a new certification and where any current certifications will be housed.

Once you have an active application, you will be able to see a reference ID, the date it was last modified and track its status.

Carbon neutral organisation

Ref ID: 1254

Last modified date: 20 Dec 2022

Status: Submitted
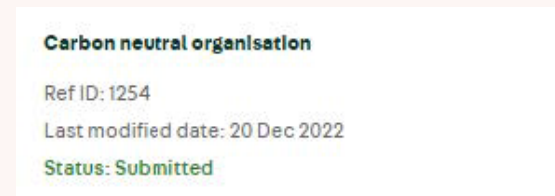
You can also view your application, submit reporting or request an extension by selecting the ellipsis (…). Menu options will be dependent upon the status of your certification.

3   Quick links

A collection of links to external resources which will assist you in the certification process:

Manage portal access
View and update accessibility for employees, consultants and auditors.

Guides & resources
View Climate Active Carbon Neutral Standards, Technical Guidance Manual and additional resources.

Get help with the certification process
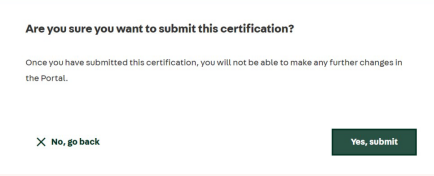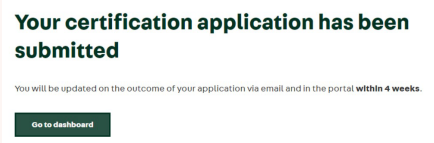A list of registered consultants and Climate Active contacts.
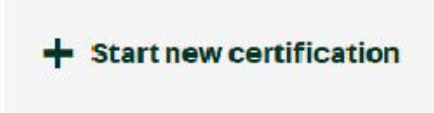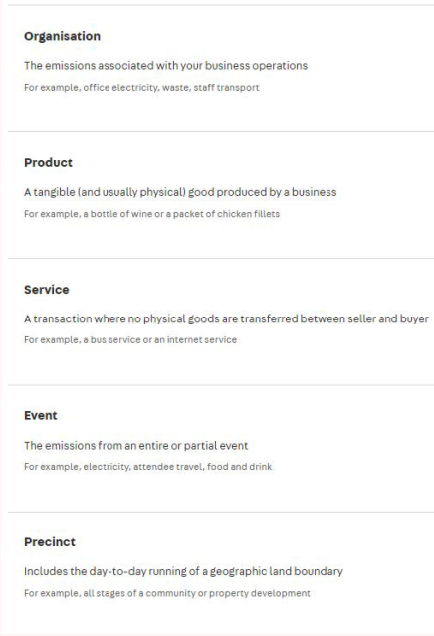
6.0

APPLYING FOR CERTIFICATION

6.1
Start a New Certification

1. From the dashboard you can apply for a certification by selecting **+ Start new certification**.

1.

2. On the following page, find the certification type you are applying for and select **Start certification**.

Note: *View the Technical Guidance Manual for guidance on each certification type and the information required for your application.*

2.

3. Fill in the required questions regarding your chosen certification. On the final page, select **Submit**, then **Yes, submit**.

3.

4. Your certification application has been submitted. You will hear from us **within 4 weeks**. To return to the homepage, select **Go to dashboard**.

4.

7.0

SUBMIT
REPORTING

7.1
Initial Reporting

Once your application is deemed successful and you have entered into the licence agreement, the status of your application will update to **Pending Initial Reporting**.

When you have completed your reports and obtained the relevant supporting documentation for your initial certification year, you can upload your documentation for submission.

1. From the dashboard, locate the certification with the status **Pending Initial Reporting**. The **Show reports** feature will now be available.

2. Click **Show reports** to open the accordion to reveal your Initial reporting action item.

3. Select the ellipsis (...) and select **Start**.

2.

3.

7.1.1
Uploading Initial Documentation

Upon selecting **Start** you will be taken to the reporting submission page for the relevant certification.

The reporting submission page will detail the reporting period you are uploading documents for. This reporting period will match the approved reporting period outlined in the application you provided. If this reporting period no longer reflects your completed documents you will need to contact Climate Active to discuss before proceeding to submit your documents.

Each certification type has different document requirements. All documents are mandatory unless noted as optional.

1. Click on the document heading to open the accordion.

2.

2. Click the **Browse files** button and locate the relevant document file from your local drive. Ensure the document meets the file criteria listed on the screen. If the file being uploaded does not meet the file criteria the upload will fail. If the document successfully uploads the **check mark will turn green**.

3. Complete **Step 2** for each mandatory document and optional document, as required.

Note: *Once a document has been uploaded you will be unable to open the document from within the Portal for security reasons. If you are unsure the uploaded document is the correct version, please delete the uploaded document and re-upload the correct version.*
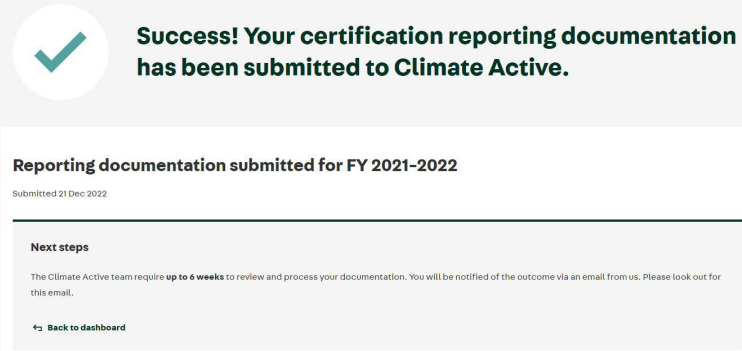
4. When all documents have been uploaded and you are ready to submit them to Climate Active, click **Submit reporting** at the bottom of the screen. If submission is successful you will be shown a success page and informed of your next steps.

Note: *Once you have successfully submitted your documents to Climate Active you are unable to make changes within the Portal. If you think you have accidentally submitted an incorrect version of a document please contact Climate Active.*

4.

Success! Your certification reporting documentation has been submitted to Climate Active.

Reporting documentation submitted for FY 2021-2022
Submitted 21 Dec 2022

Next steps
The Climate Active team require **up to 6 weeks** to review and process your documentation. You will be notified of the outcome via an email from us. Please look out for this email.

↰ **Back to dashboard**

7.2
Ongoing Reporting

Once you have achieved certification for your first year you will move onto your **ongoing reporting schedule**, determined by your reporting cycle.

Ongoing reporting will be made available within the Portal on 1 January or 1 July following the end of the reporting period. For example, on 1 July 2023 the ongoing reporting will be made available for the FY2022-23 period. Similarly on 1 January 2024 the ongoing reporting will be made available for CY2023.

1. From the dashboard, locate the certification with the status **Certified** and click **Show reports** to open the accordion to reveal your **Ongoing reporting** action item. This will have a **To do** status.

2. Select the ellipsis (…) and select **Start**.

1, 2.
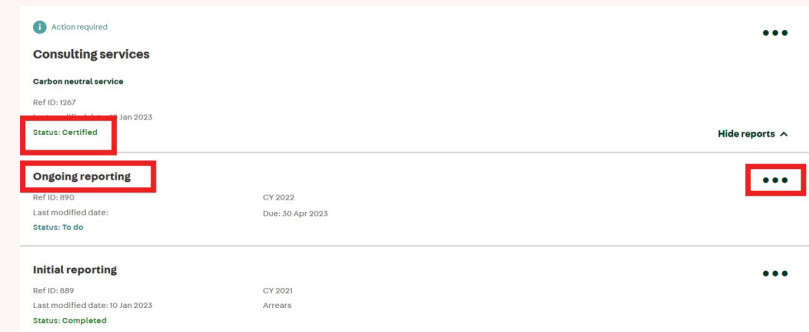
7.2.1
Uploading Ongoing Documentation

Upon selecting Start you will be taken to the reporting submission page for the relevant certification.

Each certification type has different document requirements. All documents are mandatory unless noted as optional.

Please make sure all documents have a unique and descriptive file name before you upload the document.

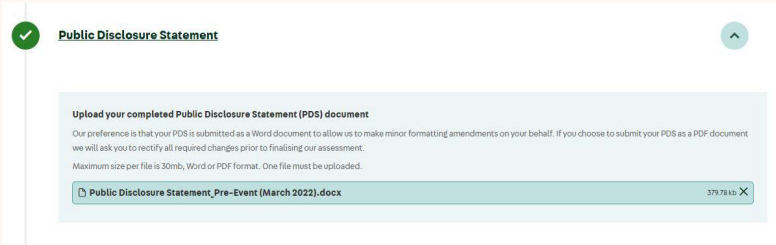**1.**   Click on the document heading to open the accordion.

1.

2.	Click the **Browse files** button and locate the relevant document file from your local drive. Ensure the document meets the file criteria listed on the screen. If the file being uploaded does not meet the file criteria the upload will fail. If the document successfully uploads the **check mark will turn green**.

3.	Complete **Step 2** for each mandatory document and optional document, as required.

	Note: *Once a document has been uploaded you will be unable to open the document from within the Portal for security reasons. If you are unsure the uploaded document is the correct version, please delete the uploaded document and re-upload the correct version.*

2.

4. When all documents have been uploaded and you are ready to submit them to Climate Active, click **Submit reporting** at the bottom of the screen. If submission is successful you will be shown a success page and informed of your next steps.

Note: *Once you have successfully submitted your documents to Climate Active you are unable to make changes within the Portal. If you think you have accidentally submitted an incorrect version of a document please contact Climate Active.*

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Reporting documentation submitted for FY 2021-2022

Submitted 21 Dec 2022

Next steps

The Climate Active team require **up to 6 weeks** to review and process your documentation. You will be notified of the outcome via an email from us. Please look out for this email.

↩ **Back to dashboard**

7.2.2
Apply for Reporting Extension

If the due date for your certification reporting has passed, you must request an extension via the **request extension** action button from the dashboard, providing Climate Active with a reason as to why you are submitting your reporting after the due date.

1. Find your **Ongoing reporting** via the **Show reports** accordion. Select the ellipsis (…) and you will be provided the option to **Request extension**.

2. Nominate a new due date and provide a reason for your extention request. Select **Send request**. Once processed, your new due date will be reflected on the dashboard.

Note: *If the length of your extension request is unreasonable it may not be granted. An alternate due date will be provided by Climate Active.*

1.

2.
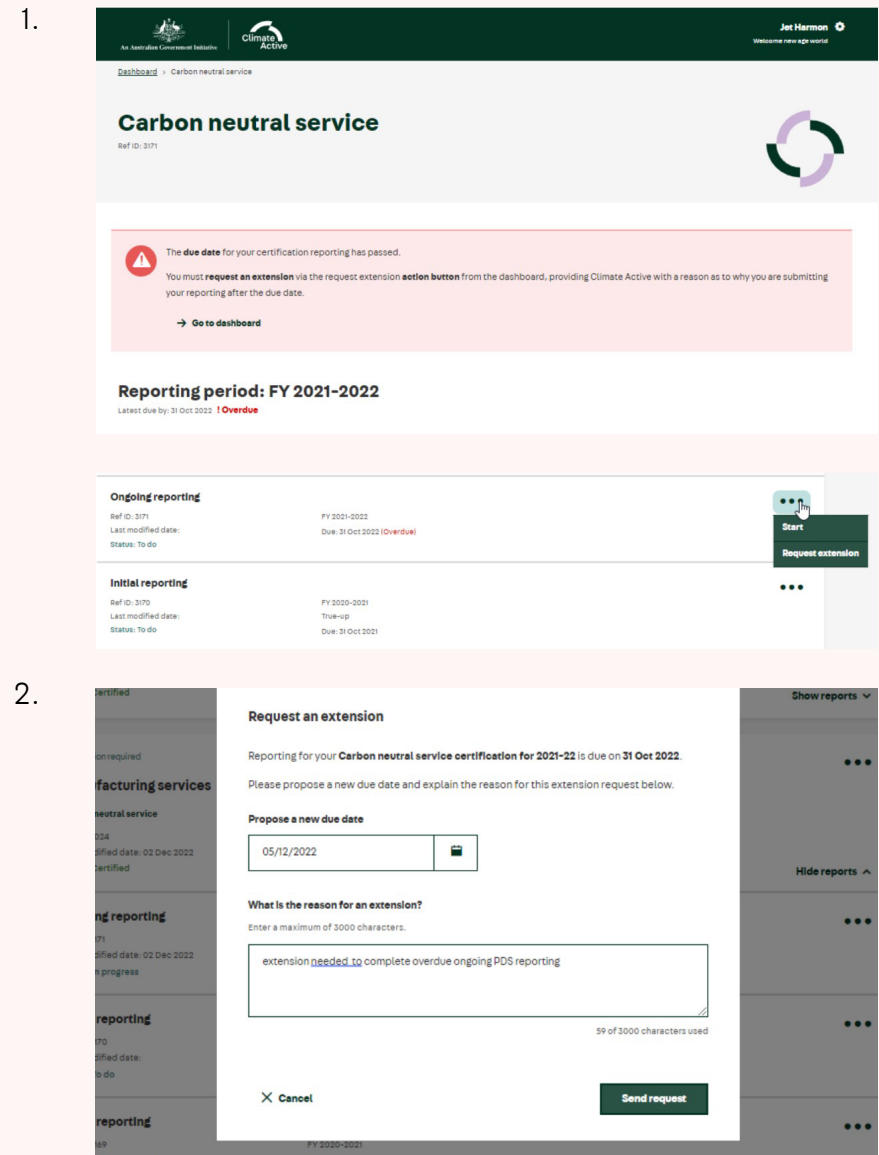
8.0

MANAGING
PORTAL ACCESS

8.1
Navigating Portal Access

The **Manage portal access** option is available from the portal header, as well as the **Quick links** tile on the **Dashboard** home page.

- Employee access

Here you are able to access the **Relationship Authorisation Manager (RAM)** which will allow the principal authority to grant individual Portal access to employees.

*For instructions on how to action this, please refer to section **1.2 Setting Up Authorisations** on page 04.*
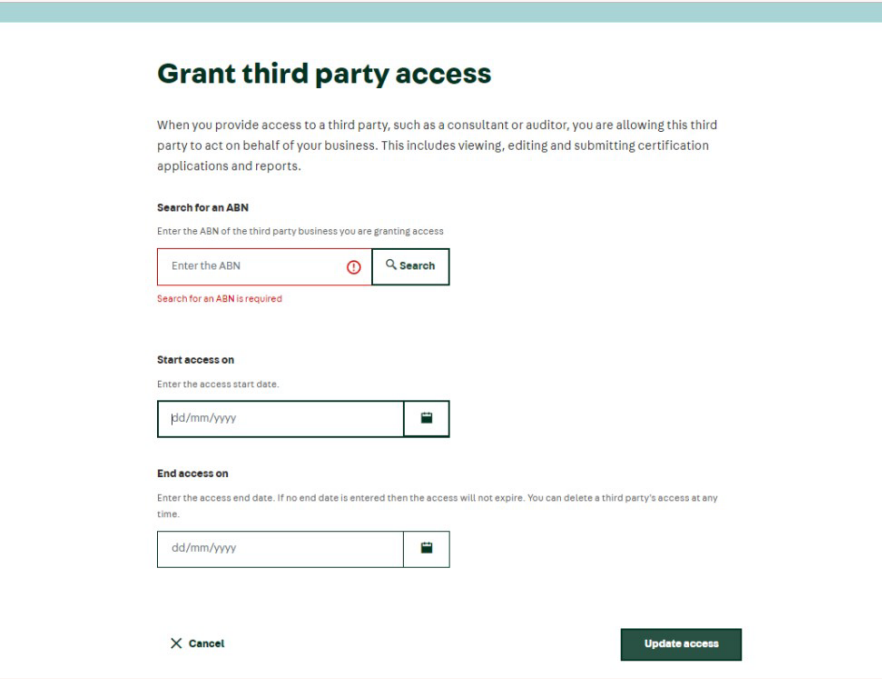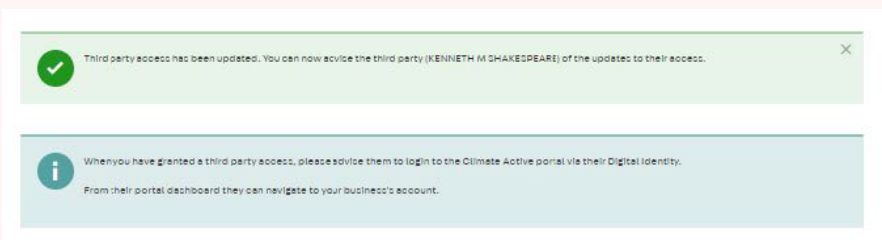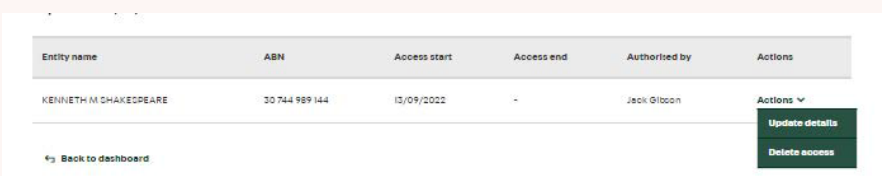
- Third party access

Here you are able to grant access to a third party business, such as a consultancy or auditing firm.
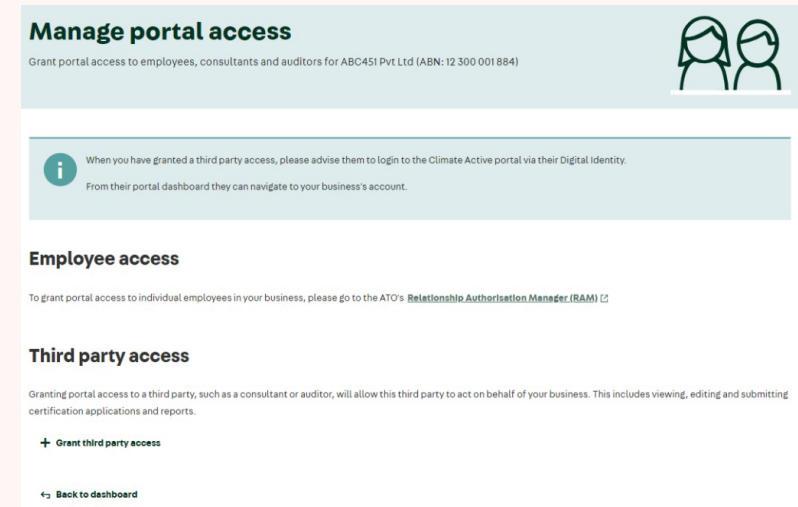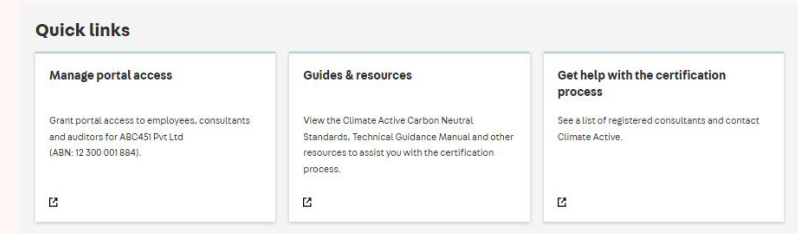
8.2
Grant Third Party Access

Granting Portal access to a third party business, such as a consultancy or auditing firm, allows the third party to act on behalf of your organisation. The third party will be able to apply for certification and submit reporting documents on your behalf.

1. Under the Third party access header, select **+ Grant third party access**

2. On the following page you will be prompted to first enter the ABN of the third party business to whom you are granting access.

3. You may then nominate the start and end dates of their access period. Please note that if no end date is nominated, their access will not expire. Finally, select **Update access.**

1.

Grant third party access

When you provide access to a third party, such as a consultant or auditor, you are allowing this third party to act on behalf of your business. This includes viewing, editing and submitting certification applications and reports.

Search for an ABN

Enter the ABN of the third party business you are granting access

| Enter the ABN | ⊘ | 🔍 Search |

Search for an ABN is required

Start access on

Enter the access start date.

| dd/mm/yyyy | 📅 |

End access on

Enter the access end date. If no end date is entered then the access will not expire. You can delete a third party's access at any time.

| dd/mm/yyyy | 📅 |

✕ Cancel   **Update access**

2.

✓ Third party access has been updated. You can now advise the third party (KENNETH M SHAKESPEARE) of the updates to their access.   ✕

ⓘ When you have granted a third party access, please advise them to login to the Climate Active portal via their Digital Identity.
From their portal dashboard they can navigate to your business's account.

3.

| Entity name	ABN	Access start	Access end	Authorised by	Actions
KENNETH M SHAKESPEARE	30 744 989 144	13/09/2022	-	Jack Gibson	Actions ⌄

Update details
Delete access

↩ Back to dashboard

8.3
Rescind Third Party Access

You may delete a third party business's access to the Portal at any time.

1. From your Manage access list, select the business you are removing access from and select **Delete**.

2. You will be asked to confirm this action. Double check you have selected the correct business before selecting **Yes, delete access.**

2.
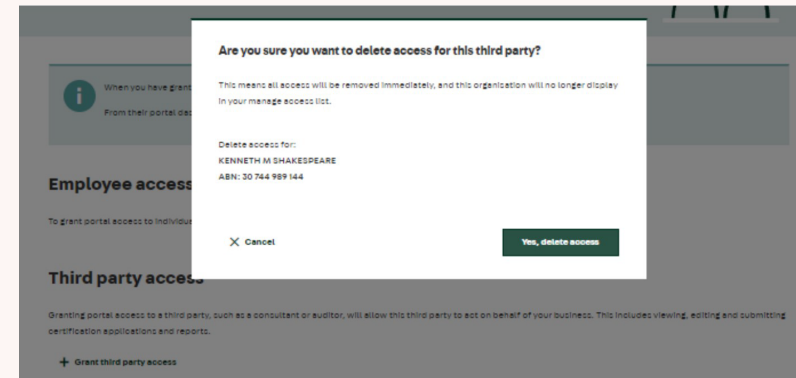
8.4
Access Another Business's Portal

If you have been granted third party access to act on behalf of another business, you can switch between Portal accounts from your dashboard.

2.

1. Login to your business's Portal account.

Note: *You will need to make sure that you have successfully been authorised to act on behalf of your business, see section 1.0 Authorising Access. Follow section 2.0 Logging In if you are unsure how to access your business's Portal account.*

2. From the dashboard you will be able to see which Portal account you are currently managing. This should currently reflect your buisness's details.
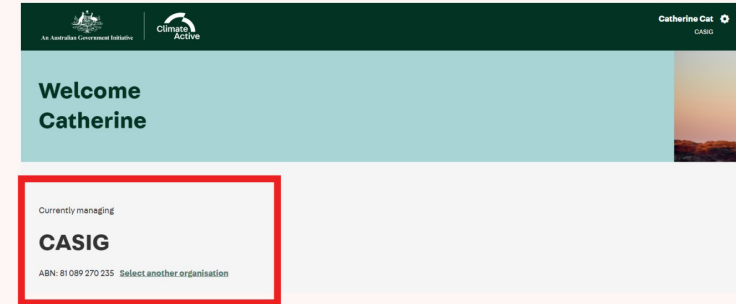
3. If your business has successfully been granted third party access by another business, you will see a clickable link, **select another organisation**, next to the ABN of your business. Click this link and a pop-up window will display detailing the list of all businesses you have been granted access to act on behalf of.

4. From the list select the business you wish to act on behalf of and click **Continue**.

5. You will be re-directed to the Portal dashboard. The dashboard will now display the businesses details you are currently managing. From here you can submit new certification applications, reporting documents or extension requests on this business's behalf.

Note: *You cannot update business or contact details.*

6. When you want to switch back to managing your own business's Portal account, repeat **steps 3 and 4**, selecting your own business from the list provided. You will be taken back to your Portal dashboard.

4.

5.