

NAVIGATING THE PORTAL

Version 1 - January 2023



Directory

This guide will assist you to navigate the Portal.

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For more information visit:

- www.mygovind.gov.au
- info.authorisationmanager.gov.au

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1.0

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**.

Authorising Access

- 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.

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**.

Authorising Access

- 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.

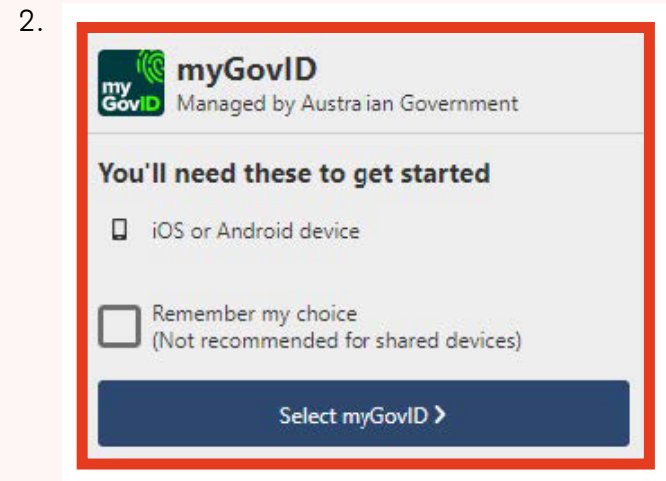
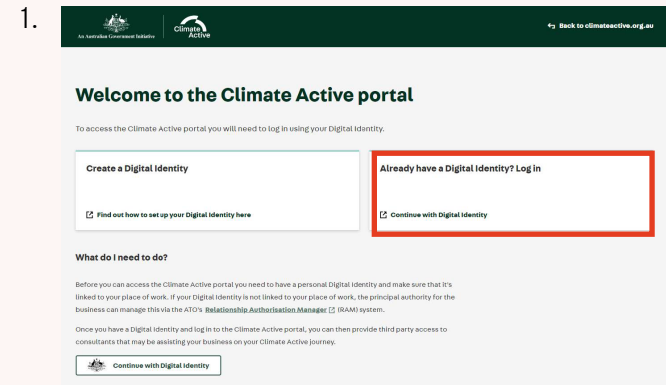
2.0

LOGGING IN

2.0 Logging In

If section **1.0 Authorising Access** has been successfully 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.

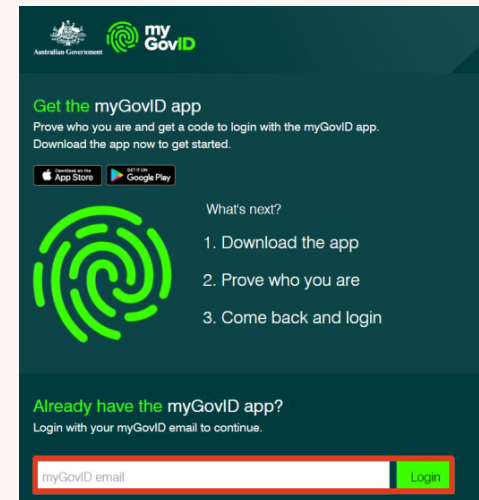
1. Go to <https://portal.climateactive.org.au/>. You will be taken to the Welcome page of the Climate Active Portal. Select **Already have a Digital Identity? Log in.**
2. On the following page, you will be asked to select an identity provider. Locate **myGovID** and select **Select myGovID.**



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.



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

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.

The screenshot shows a web form titled "Create a portal account" with a progress indicator showing two steps: "Business details" (current) and "Contact information". The form is divided into several sections:

- Business details**
 - Responsible entity details**
 - Entity name:** Text input field containing "ABC45 Pvt Ltd".
 - ABN:** Text input field containing "12 300 001 884".
 - ACN:** Text input field.
 - Trading as (optional):**
 - Text input field for "Enter the business' primary trading name".
 - Checkbox: "This entity is a registered not-for-profit (entitled to a 20% science fee discount)".
 - Business website address (optional):** Text input field.
- How did you hear about Climate Active?**
 - Radio buttons: Internet, Referral, Media/ social media, Climate Active website, Other.
- Provide a brief description of your business**
 - Text input field with a character count: "0 of 4000 characters used".
- Main business activity**
 - Text: "You can find your ANZSIC information on your organisation's records on the Australian Business Register (ABR)."
 - ANZSIC division:** Dropdown menu with "Please select".
 - ANZSIC class:** Dropdown menu with "Please select".
- Business street address**
 - Address:** Text input field with a hint: "Start typing and then select your address from the drop-down list".
 - Text: "Start typing the main business street address".
 - Text: "Or you can: Enter it manually".
- Business postal address**
 - Checkbox: "Same as street address" (checked).

A "Save and next" button is located at the bottom right of the form.

2. Enter details for your key contacts.

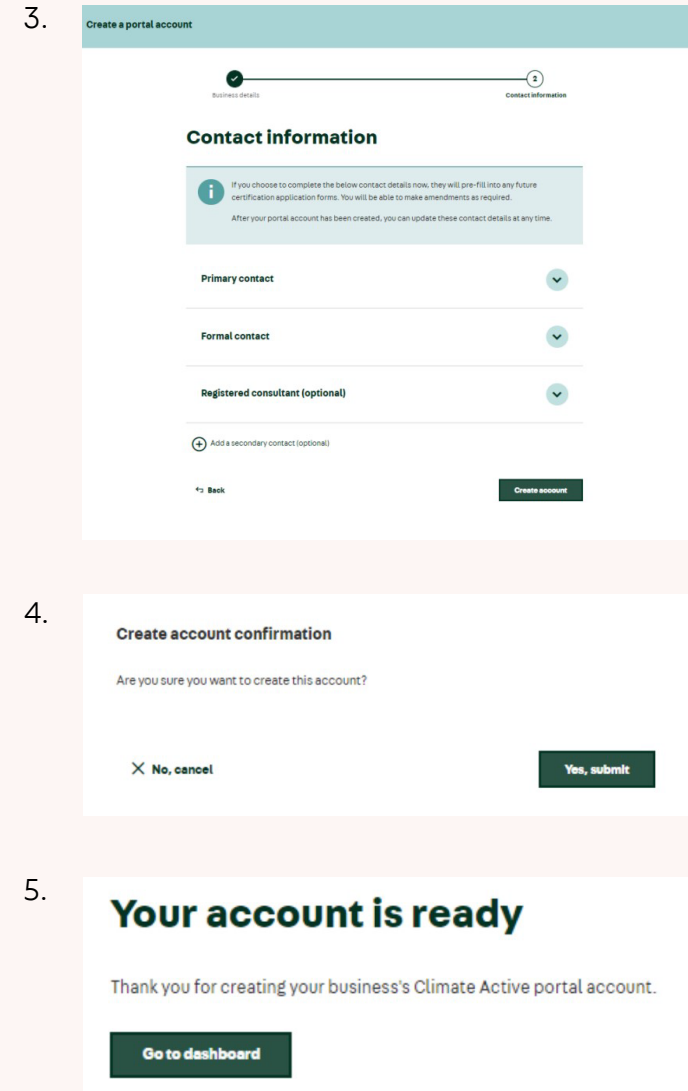
Please ensure you have the following information ready:

- 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.



5.0

DASHBOARD

Dashboard

1.

An Australian Government Initiative | Climate Active

Welcome Kira

Kira Galindo
ABC451 Pvt Ltd

- Manage business details
- Manage contact information
- Manage portal access
- Sign out

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

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.

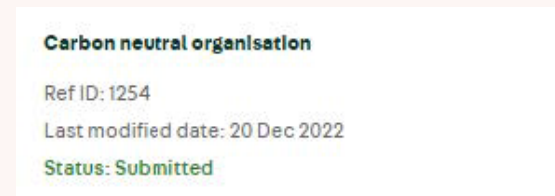
Sign out

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.



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.

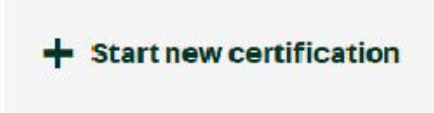
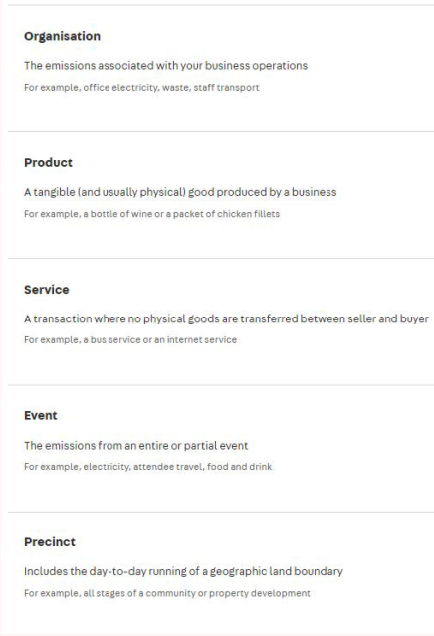
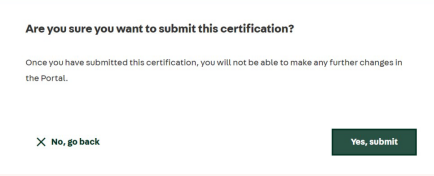
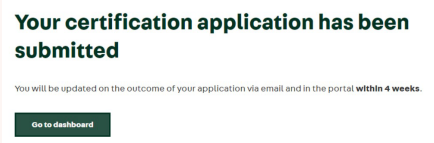
6.0

APPLYING FOR CERTIFICATION

6.1

Start a New Certification

1. From the dashboard you can apply for a certification by selecting **+ Start new certification**.
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.
3. Fill in the required questions regarding your chosen certification. On the final page, select **Submit**, then **Yes, submit**.
4. Your certification application has been submitted. You will hear from us **within 4 weeks**. To return to the homepage, select **Go to dashboard**.

1. A light blue button with a dark green plus sign and the text "Start new certification".
2. A form with four sections: "Organisation" (emissions from business operations), "Product" (tangible goods), "Service" (transactions), and "Event" (entire or partial event). Each section has a brief description and an example.
3. A white screen with the question "Are you sure you want to submit this certification?". Below the question is a warning: "Once you have submitted this certification, you will not be able to make any further changes in the Portal." At the bottom are two buttons: "No, go back" and "Yes, submit".
4. A white screen with the heading "Your certification application has been submitted". Below the heading is the text: "You will be updated on the outcome of your application via email and in the portal within 4 weeks." At the bottom is a "Go to dashboard" button.

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.

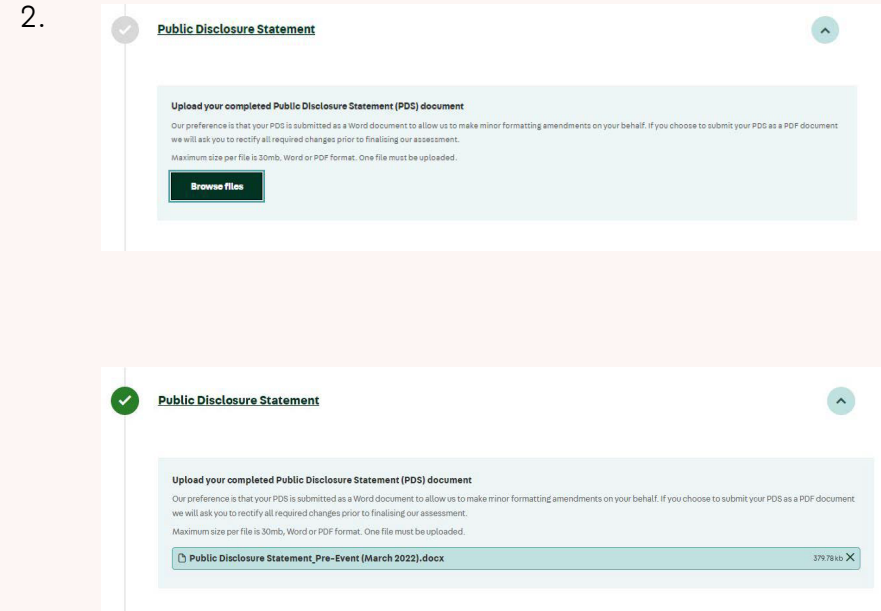
Each certification type has different document requirements. All documents are mandatory unless noted as optional.

The screenshot shows a web interface for submitting reporting documents. At the top, it says "Reporting period: FY 2021-2022". Below this is a light blue box with an information icon and text: "Upload your completed certification reporting documents. Please ensure you use the latest reporting templates. If you are unsure if you have the correct templates, please [contact us](#) or your registered consultant." Below this is a vertical list of document types, each with a green checkmark on the left and a dropdown arrow on the right. The items are: "Public Disclosure Statement reporting type", "Public Disclosure Statement", "Climate Active carbon inventory", "Climate Active electricity calculator", "Climate Active calculator(s) (optional)", "Technical assessment", and "Third party validation report". At the bottom left is a link "Back to dashboard" and at the bottom right is a dark green button labeled "Submit reporting".

Submit Reporting

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

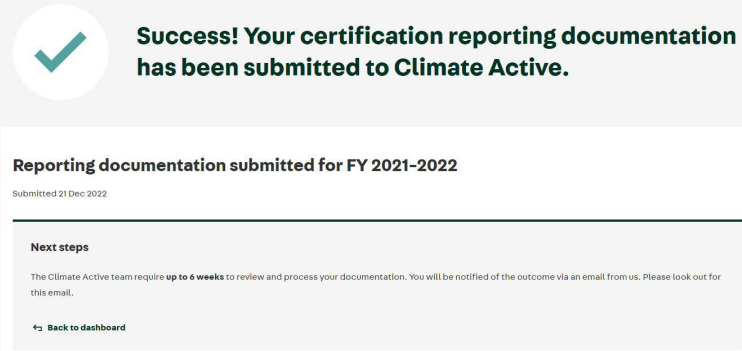


Submit Reporting

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.



The screenshot shows a success message on a light blue background. On the left is a circular icon with a green checkmark. To its right, the text reads: "Success! Your certification reporting documentation has been submitted to Climate Active." Below this is a white box with the title "Reporting documentation submitted for FY 2021-2022" and a subtitle "Submitted 21 Dec 2022". A horizontal line separates this from a section titled "Next steps" which contains the text: "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." At the bottom of this section is a link that says "Back to dashboard" with a right-pointing arrow.

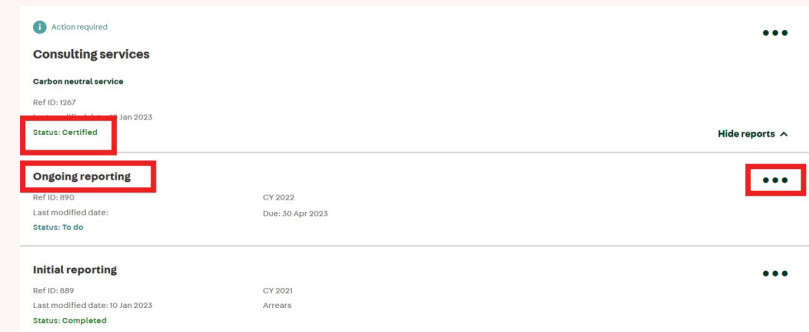
7.2 Ongoing Reporting

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.

Reporting period: CY 2022
Latest due by: 30 Apr 2023

i Upload your completed certification reporting documents.
Please ensure you use the latest reporting templates.
If you are unsure if you have the correct templates, please [contact us](#) or your registered consultant.

Public Disclosure Statement reporting type ▼

Public Disclosure Statement ▲

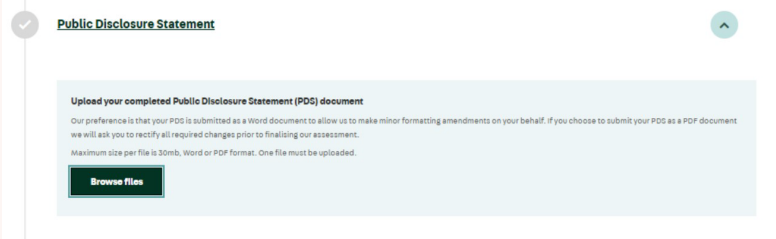
Upload your completed Public Disclosure Statement (PDS) document
Our preference is that your PDS is submitted as a Word document to allow us to make minor formatting amendments on your behalf. If you choose to submit your PDS as a PDF document we will ask you to rectify all required changes prior to finalising our assessment.
Maximum size per file is 30mb, Word or PDF format. One file must be uploaded.

Submit Reporting

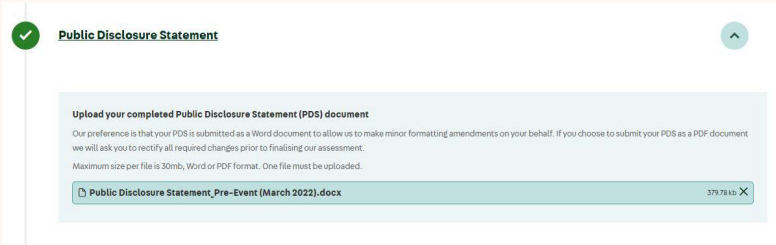
2. Click the **Browse files** button and locate the relevant document file from your local drive. Ensure the document meets the file criteria listed on the screen. If the file being uploaded does not meet the file criteria the upload will fail. If the document successfully uploads the **check mark will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



The screenshot shows a web interface for uploading a Public Disclosure Statement (PDS) document. At the top left, there is a grey circle with a white checkmark. The title "Public Disclosure Statement" is centered at the top. Below the title, there is a light blue box containing the following text: "Upload your completed Public Disclosure Statement (PDS) document", "Our preference is that your PDS is submitted as a Word document to allow us to make minor formatting amendments on your behalf. If you choose to submit your PDS as a PDF document we will ask you to rectify all required changes prior to finalising our assessment.", and "Maximum size per file is 30mb, Word or PDF format. One file must be uploaded." At the bottom of this box is a dark green button with the text "Browse files".



The screenshot shows the same web interface as above, but with a green checkmark in a circle at the top left. The document has been successfully uploaded, and a file name "Public Disclosure Statement, Pre-Event (March 2022).docx" is displayed in a light blue box at the bottom. To the right of the file name, the size "379.78 KB" and a close icon (X) are visible.

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.

A screenshot of a success message in a web portal. At the top, there is a light green banner with a white circle containing a green checkmark on the left. To the right of the checkmark, the text reads "Success! Your certification reporting documentation has been submitted to Climate Active." Below this banner, the main content area has a white background. It features the heading "Reporting documentation submitted for FY 2021-2022" in bold, followed by the text "Submitted 21 Dec 2022". A horizontal line separates this from a section titled "Next steps" in bold. Under "Next steps", the text says "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." At the bottom of this section, there is a link that says "← Back to dashboard".

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.

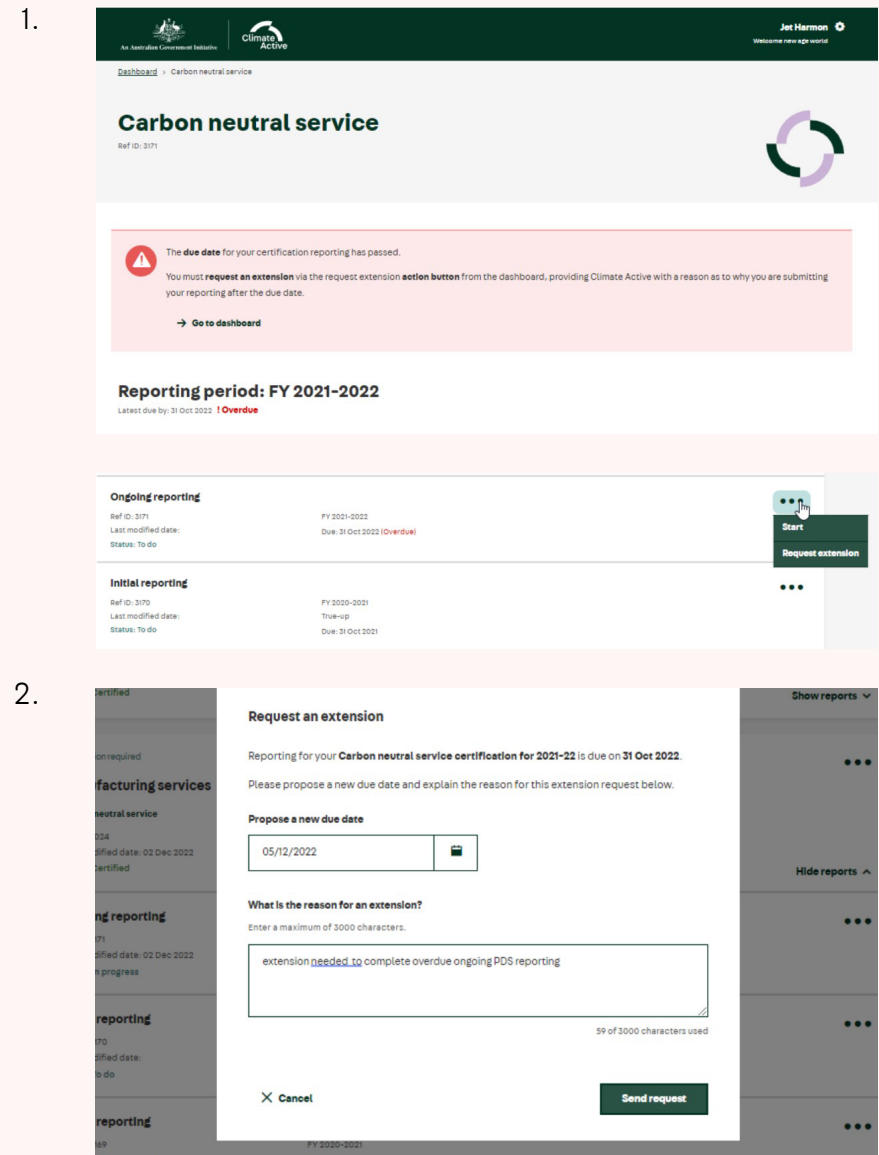
[← Back to dashboard](#)

7.2.2 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 extension 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.*



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.

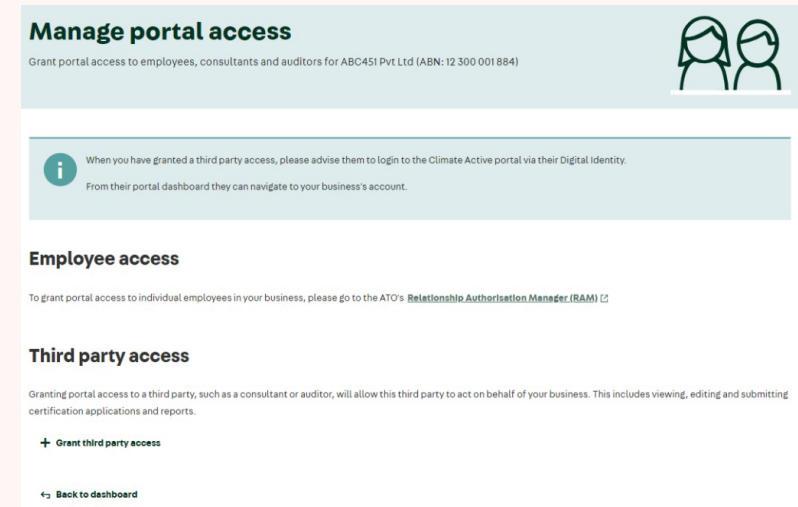
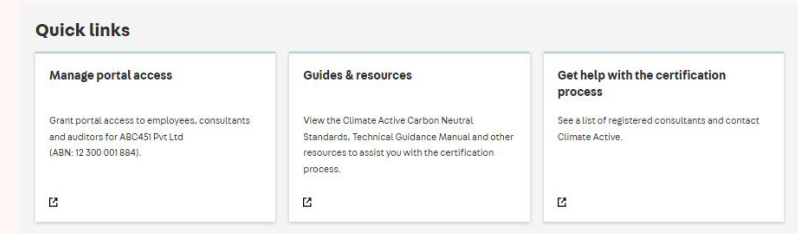
- Employee access

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

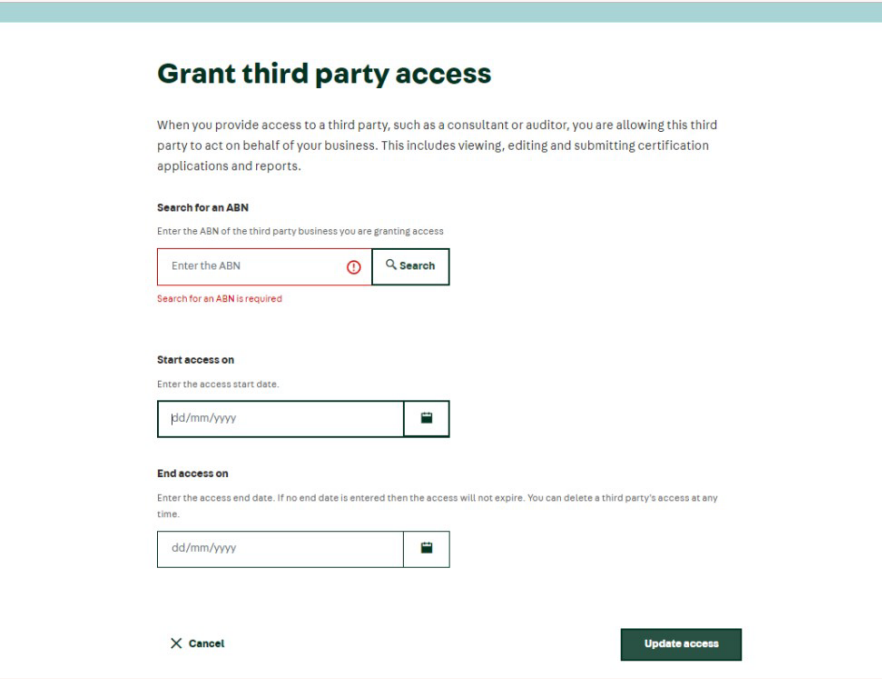
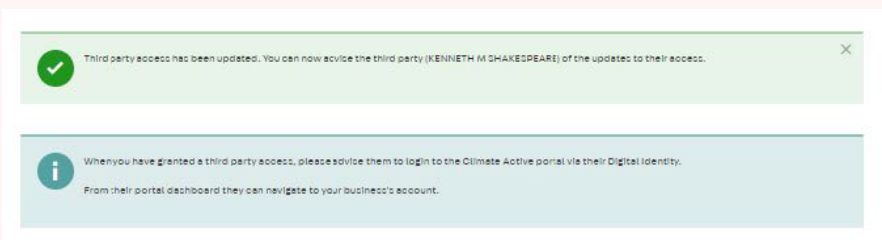
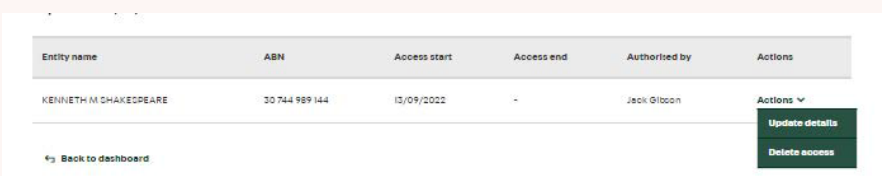
Here you are able to grant access to a third party business, such as a consultancy or auditing firm.



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. 
2. 
3. 

Entity name	ABN	Access start	Access end	Authorized by	Actions
KENNETH M CHAKESPEARE	30 744 989 144	13/09/2022	-	Jack Gibson	Update details Delete access

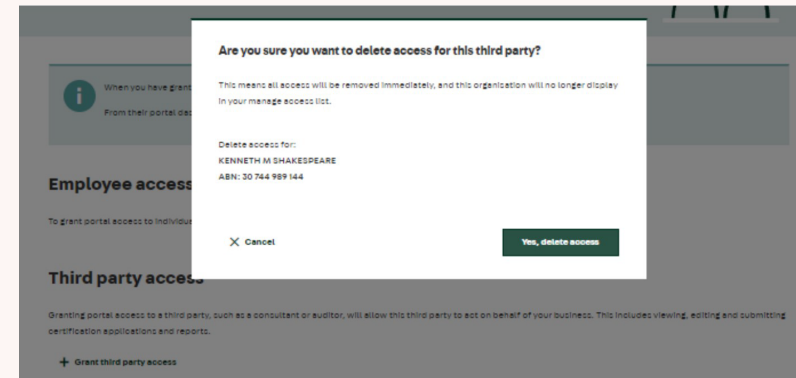
[Back to dashboard](#)

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.

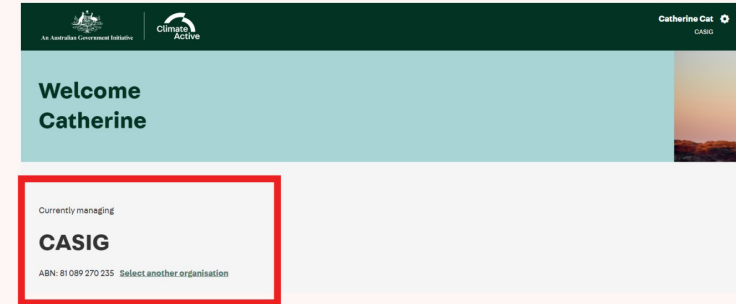


8.4 Access Another Business's Portal

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

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 business's details.

2.



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.

Select an organisation ✕

You have access to act on behalf of the businesses listed below.

If you cannot see a business you were expecting, you will need to ask the business to grant your third party access.

Entity name	Entity ABN	Access start	Access end
<input checked="" type="radio"/> ABC451 Pvt Ltd	12 300 001 884	20/01/2023	05/02/2023
<input type="radio"/> BATAVIA ROSS	48 078 944 000	15/12/2022	
<input type="radio"/> CASIG	81 000 070 000		

✕ Cancel Continue

5.

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Welcome Catherine

Currently managing
ABC451 Pvt Ltd
ABN: 12 300 001 884 [Select another organisation](#)