

CREATING A CCS PERSONNEL ROLE

There are 3 roles to connect a user to CCS. This tip sheet will walk you through how to create these roles:

- Management or Control
- Operational
- Contact
- Troubleshooting

If you are unsure of what CCS Role to assign a user, please contact CCS for further information.

Summary

Management and Control Role:

1. Click on the settings cog
2. Select CCS provider
3. Select Personnel Tab
4. Click the create button and fill in the details required:
 - a. Select Position
 - b. Select start Date
 - c. Select Authorised by
 - d. Answer previous history questions
 - e. Answer Declaration questions and upload all documents.
5. Click Submit

Operational / Contact Roles:

1. Click on the settings cog
2. Select user/personnel
3. Select CCS Personnel Roles Tab
4. Click the add role button and fill in the details required:
 - f. Select Role (Operational or Contact)
 - g. Select start Date
 - h. Select Authorised by
 - i. Answer Declaration questions and upload all documents.
5. Click Submit

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Detailed

There are 3 different CCS role

- 1- Management or Control
- 2- Operational (*page 6*)
- 3- Service Contact (*page 7*)

If you are unsure of what CCS Role to assign a user please contact CCS for further information.

Management and Control role

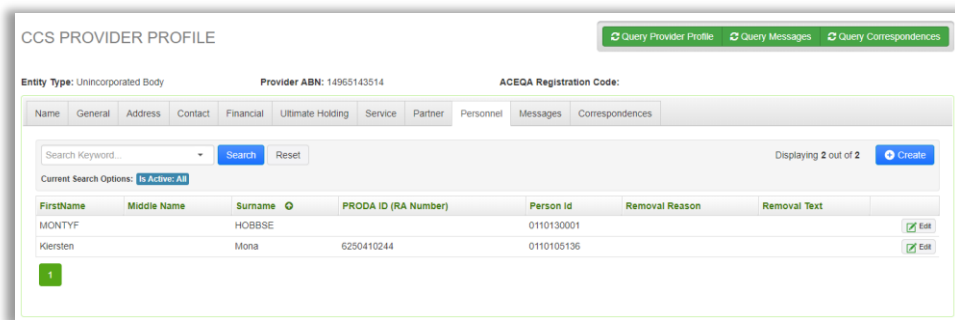
This user can only be created within your CCS provider Profile.

Select  Cog button



Select CCS Provider

Select Personnel tab

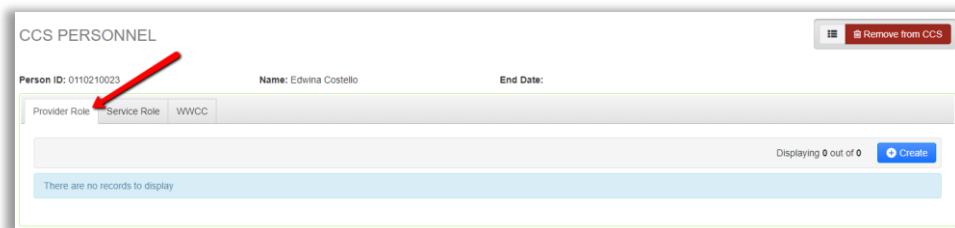
Select  Edit button for the required person



The screenshot shows the 'CCS PROVIDER PROFILE' page. At the top, there are three links: 'Query Provider Profile', 'Query Messages', and 'Query Correspondences'. Below these, the 'Entity Type' is 'Unincorporated Body', 'Provider ABN' is '14965143514', and 'ACEQA Registration Code' is blank. A navigation bar includes tabs for 'Name', 'General', 'Address', 'Contact', 'Financial', 'Ultimate Holding', 'Service', 'Partner', 'Personnel', 'Messages', and 'Correspondences'. The 'Personnel' tab is selected. A search bar with 'Search Keyword...' and 'Search' and 'Reset' buttons is present. Below the search bar, it says 'Current Search Options: Is Active: All' and 'Displaying 2 out of 2'. A table lists two personnel records:

FirstName	Middle Name	Surname	PRODA ID (RA Number)	Person Id	Removal Reason	Removal Text
MONTYF		HOBBS		0110130001		
Klersten		Mona	6250410244	0110105136		

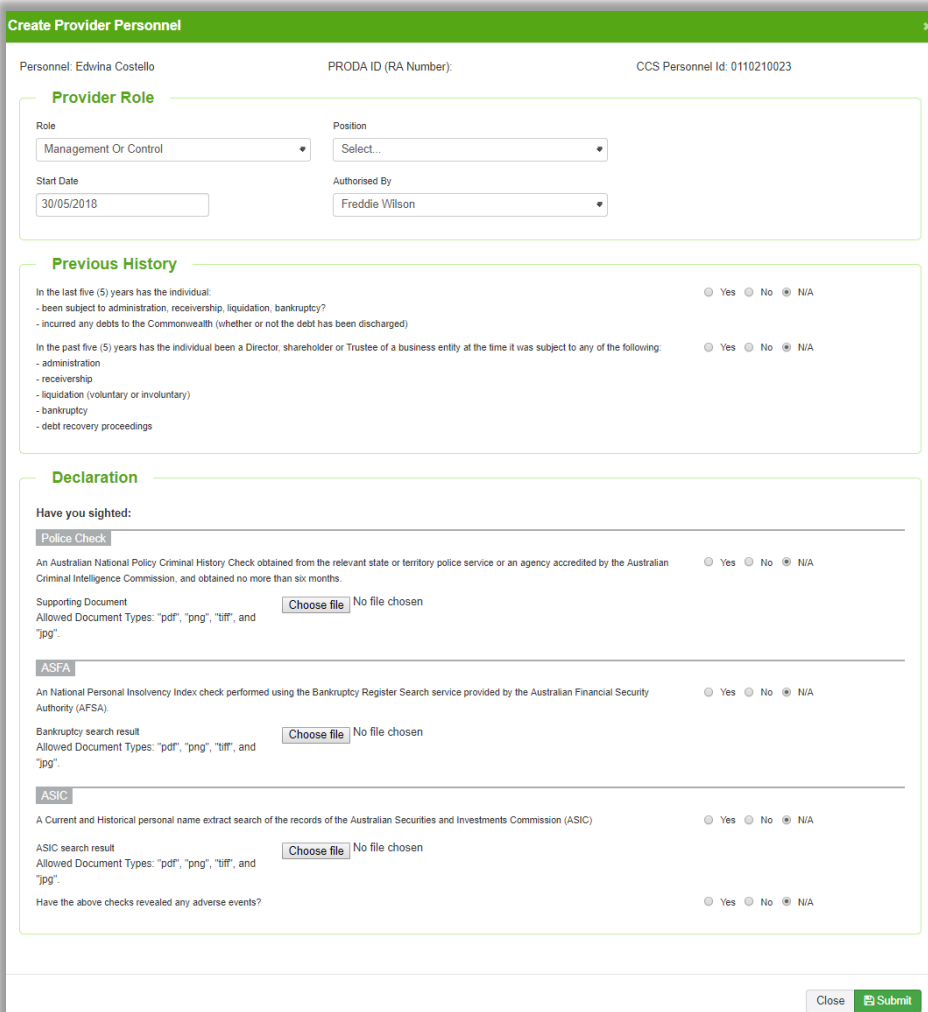
Select Provider Role tab:



The screenshot shows the 'CCS PERSONNEL' page. At the top right, there is a 'Remove from CCS' button. Below, the 'Person ID' is '0110210023', 'Name' is 'Edwina Costello', and 'End Date' is blank. A navigation bar includes tabs for 'Provider Role', 'Service Role', and 'WWCC'. The 'Provider Role' tab is selected. Below the tabs, it says 'Displaying 0 out of 0' and 'Create'. A message box at the bottom states 'There are no records to display'.

Select  button and the following window will open:

Detailed cont.



Create Provider Personnel

Personnel: Edvina Costello PRODA ID (RA Number): CCS Personnel Id: 0110210023

Provider Role

Role: Management Or Control Position: Select...

Start Date: 30/05/2018 Authorised By: Freddie Wilson

Previous History

In the last five (5) years has the individual:

- been subject to administration, receivership, liquidation, bankruptcy? Yes No N/A
- incurred any debts to the Commonwealth (whether or not the debt has been discharged) Yes No N/A

In the past five (5) years has the individual been a Director, shareholder or Trustee of a business entity at the time it was subject to any of the following:

- administration Yes No N/A
- receivership Yes No N/A
- liquidation (voluntary or involuntary) Yes No N/A
- bankruptcy Yes No N/A
- debt recovery proceedings Yes No N/A

Declaration

Have you sighted:

Police Check

An Australian National Police Criminal History Check obtained from the relevant state or territory police service or an agency accredited by the Australian Criminal Intelligence Commission, and obtained no more than six months. Yes No N/A

Supporting Document No file chosen
Allowed Document Types: "pdf", "png", "tiff", and "jpg".

ASFA

An National Personal Insolvency Index check performed using the Bankruptcy Register Search service provided by the Australian Financial Security Authority (AFSA). Yes No N/A

Bankruptcy search result No file chosen
Allowed Document Types: "pdf", "png", "tiff", and "jpg".

ASIC

A Current and Historical personal name extract search of the records of the Australian Securities and Investments Commission (ASIC). Yes No N/A

ASIC search result No file chosen
Allowed Document Types: "pdf", "png", "tiff", and "jpg".

Have the above checks revealed any adverse events? Yes No N/A

Close

Select the user's Position, enter their start date and select the person authorising the transaction.

You will next need to answer questions relating to the user's previous history.

All fields within the **Declaration** are mandatory.

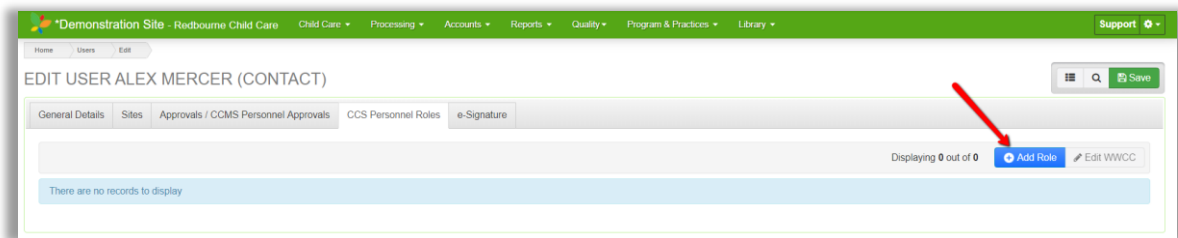
You will need to complete each of these fields, upload supporting documents and click on the **Submit** button.

It is important to note that this must be submitted by a user with a 'Management or Control' role.

Detailed cont.

Operational Role

This role is created through the user record. While in the user record click on the CCS Personnel Roles tab and click on **Add Role**



The following window will then appear:

Make sure the **Operational Role** is selected

Change **start date** if needed

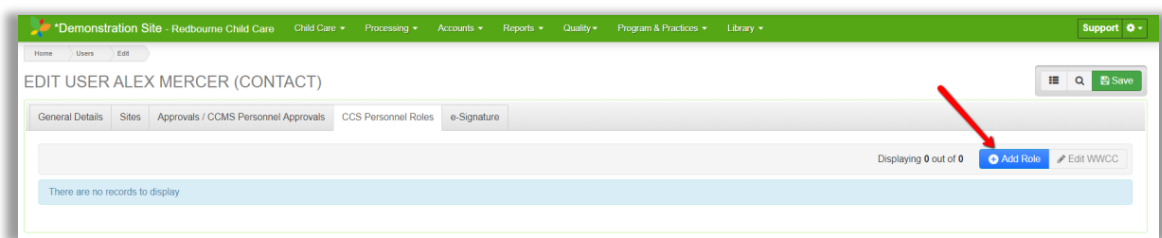
Select **Authorised Person**

Fill in the **Declaration**, you will need to complete each of these fields, upload supporting documents and click on the **Submit** button.

Detailed cont.

Service Contact Role

This role is created through the user record. While in the user record click on the CCS Personnel Roles tab and click on Add Role



The following window will then appear:

Make sure the Contact Role is selected

Change start date if needed

Select Authorised Person

Fill in the Declaration, you will need to complete each of these fields, upload supporting documents and click on the 'Submit' button.

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Troubleshooting

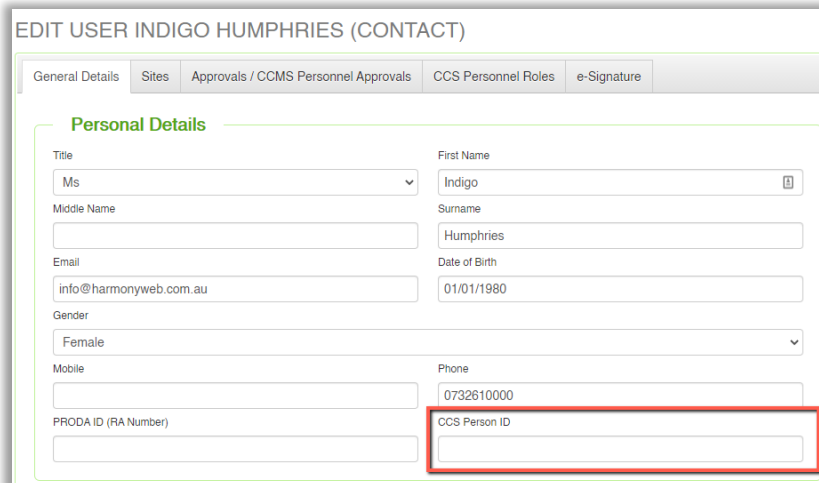
Issue: Surname does not match error

Resolution: While yes, it can mean that the name they registered with doesn't match your system however it can also mean that the user hasn't completed their full registration process. The user needs to go back to PRODA to sort this out.

Issue: Error saying Person already exists.

Why? We see this error occurring either when the service has set this person up in the PEP or they are returning and therefore already linked with your service. Therefore, they do exist and you need to pull them through.

Resolution: Please add the educators CCS Person I.D in their general tab then click Save.



EDIT USER INDIGO HUMPHRIES (CONTACT)

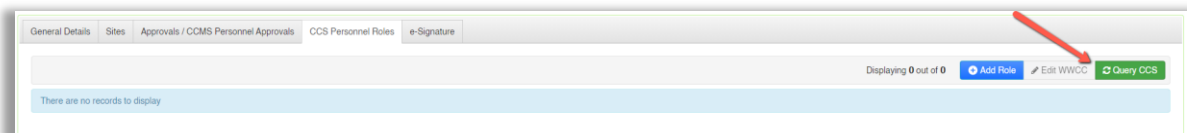
General Details Sites Approvals / CCMS Personnel Approvals **CCS Personnel Roles** e-Signature

Personal Details

Title: Ms
First Name: Indigo
Middle Name:
Surname: Humphries
Email: info@harmonyweb.com.au
Date of Birth: 01/01/1980
Gender: Female
Mobile:
Phone: 0732610000
PRODA ID (RA Number):
CCS Person ID:

then move onto the **CCS Personnel Roles** tab and click on **Query CCS** to pull their record through.

Once their record comes through then click on edit to upload the police check and submit.



General Details Sites Approvals / CCMS Personnel Approvals **CCS Personnel Roles** e-Signature

Displaying 0 out of 0 [Add Role](#) [Edit WWC](#) [Query CCS](#)

There are no records to display