USER GUIDE TO MANAGE ORGANISATION AUTHORISATION

Contents

1.1. Manage Organisation Authorisation – Employer User

Purpose
The purpose of this application is for external Employer users to request additional organisation authorisations on their user profiles.

Business Scenario
In this scenario the Employer User will request an additional organisation authorisation on his/her User profile.

Prerequisites
The following prerequisites are applicable when processing this transaction: • Employer user is registered on CompEasy System • Able to navigate CompEasy System

1.1.1. Home

Step	Action
[1]	Click the **Manage Organisation Authorisation** Manage Organisation Authorisation tile to access the transaction.

1.1.2.   User Profile Details
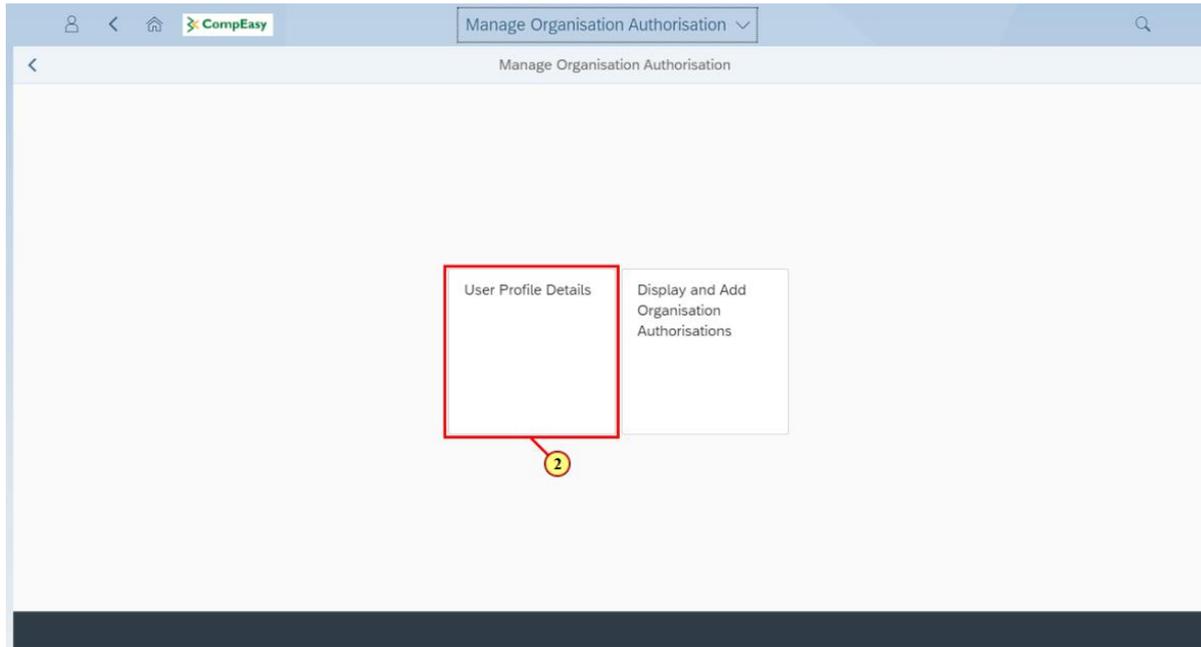
Step	Action
[2]	Click the **User Profile Details** User Profile Details tile to access the transaction.

1.1.3. User Profile Details Display
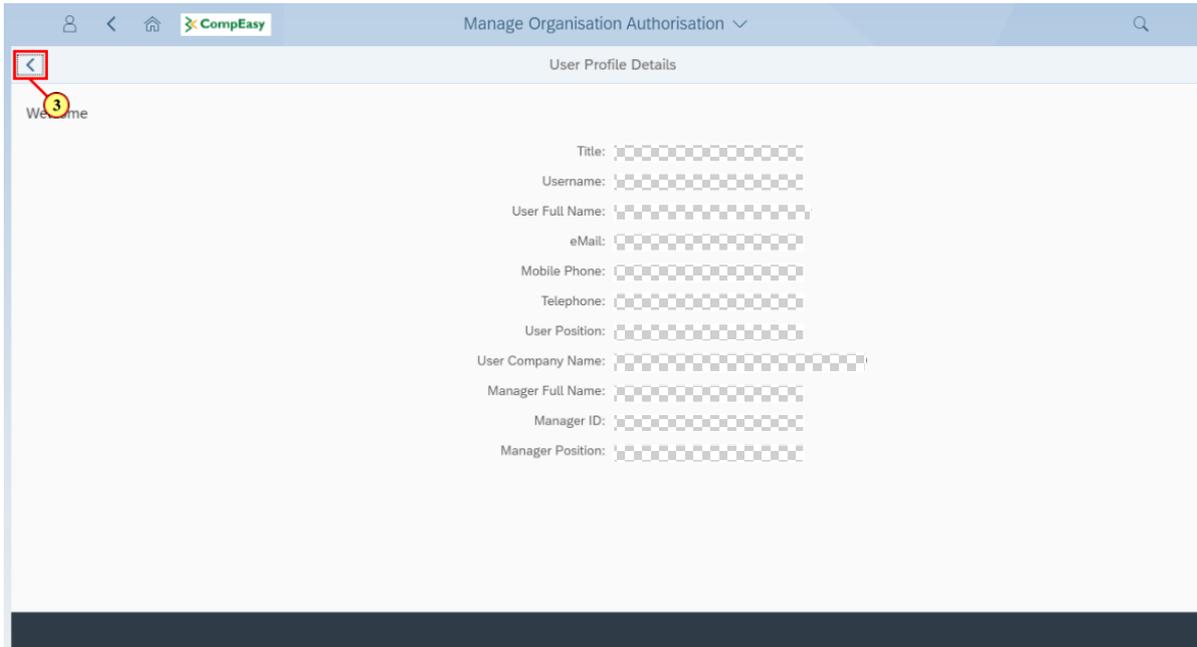
Step	Action
[3]	Click the **Back** < button to go to Manage Organisation Authorisation.

1.1.4. Display and Add Organisation Authorisation
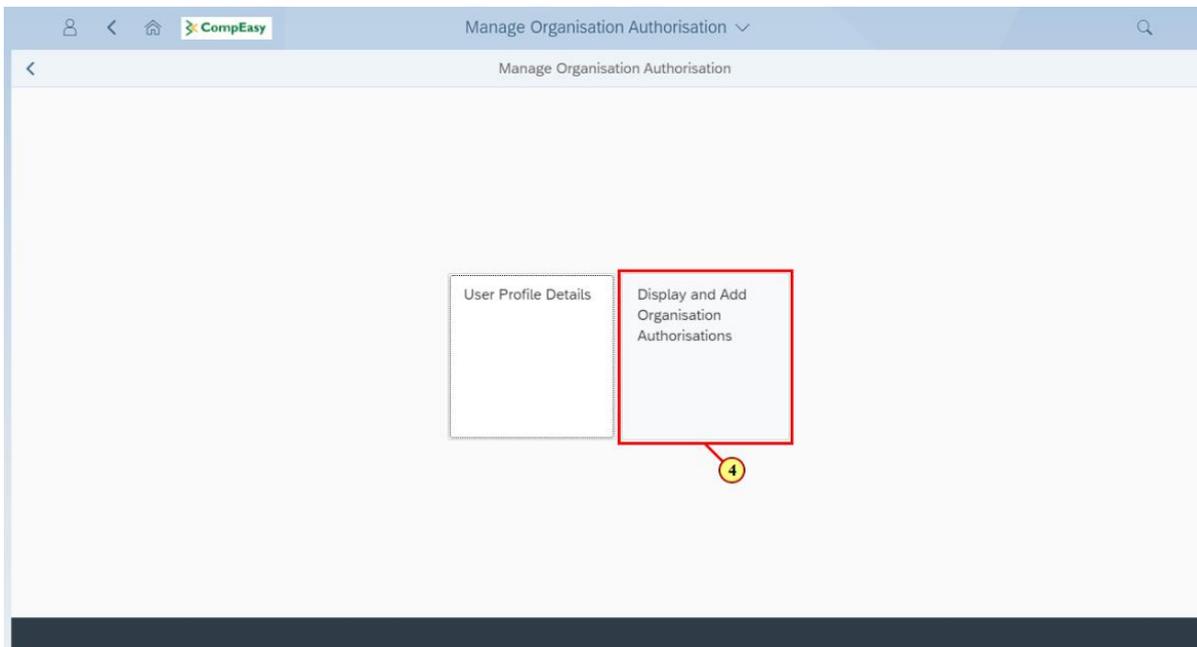
Step	Action
[4]	Click the **Display and Add Organisation Authorisations** Display and Add Organisation Authorisations tile to access the transaction.
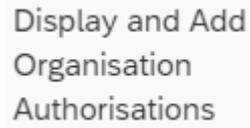
1.1.5.   Display Organisation Authorisation

Step	Action
[5]	Click in the **area below the scroll bar** to scroll down.

1.1.6. Add Organisation Authorisation

Step	Action
[6]	Click the **ADD REGISTRATION** ![ADD REGISTRATION] button to add new registration.

1.1.7. Define 3rd Party Role
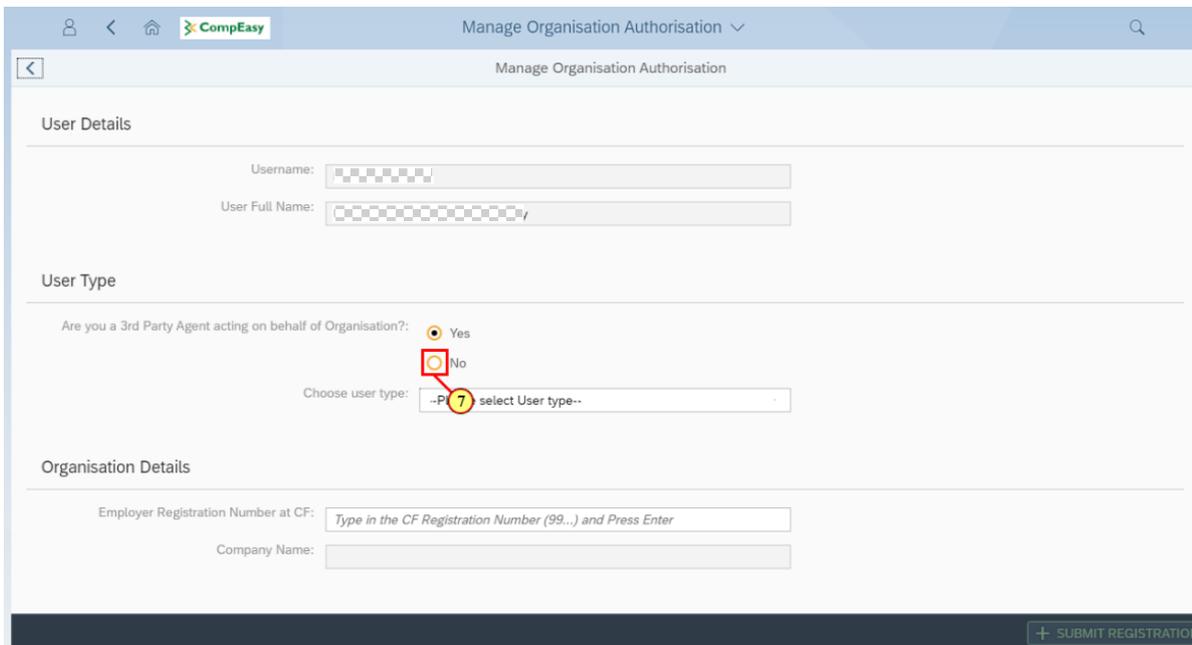
Step	Action
[7]	Click to select the **No** ⭘ radio button.

1.1.8. Define User Type (1)

Step	Action
[8]	Click the **Choose user type** field to activate it.

1.1.9. Define User Type (2)

Step	Action
[9]	Click the **Choose user type** [-] **drop down option** button to display the available list.

1.1.10. Define User Type (3)

Step	Action
[10]	Double click on the **Choose user type** Employer User option to select it.

1.1.11. Enter Organisation Registration Number

Step	Action
[12] [13]	Enter the **99…… number** in the **Employer Registration Number at CF Type in the CF** field and Please press the enter key from the keyboard.

1.1.12. Upload Mandatory Documents (1)

Step	Action
[14]	Scroll down to the Document upload section
[15]	Click the **Document type** ⌄ **drop down option** button to display the available list.

1.1.13. Upload Mandatory Documents (2)

Step	Action
[16]	Double click on the **Document type** Certified ID or Passport of the Director o Employer Company option to select it.

1.1.14. Upload Mandatory Documents (3)
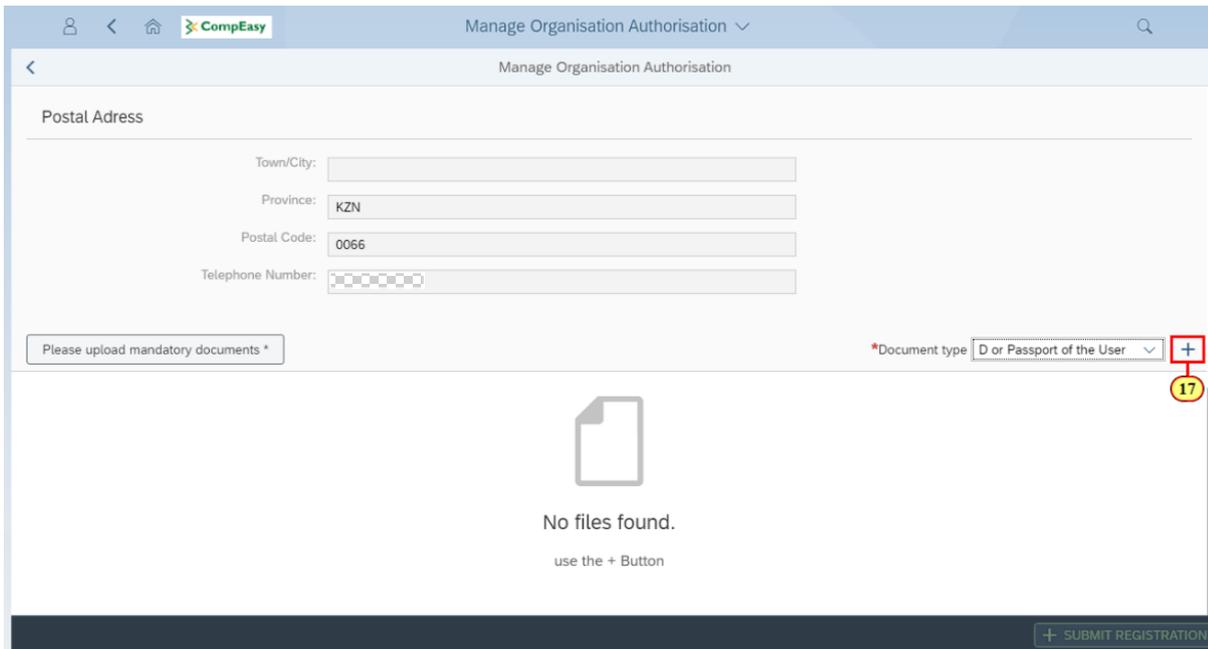
Step	Action
[17]	Click the **Add** ✚ button to upload a document.

1.1.15. Upload Mandatory Documents (4)
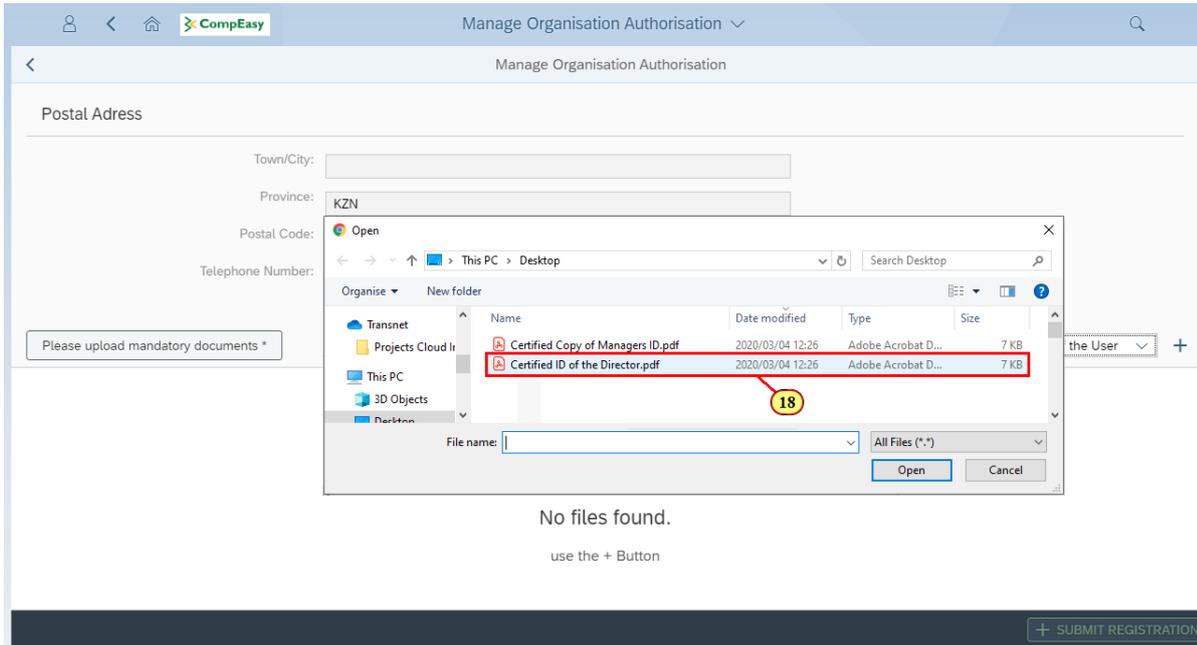
Step	Action
[18]	Double click on the **Certified ID of the Director.pdf** ![Certified ID of the Director.pdf] option to select it.

1.1.16. Repeat the Above Par's 1.1.12 to 1.1.15 to Upload All Required Documents
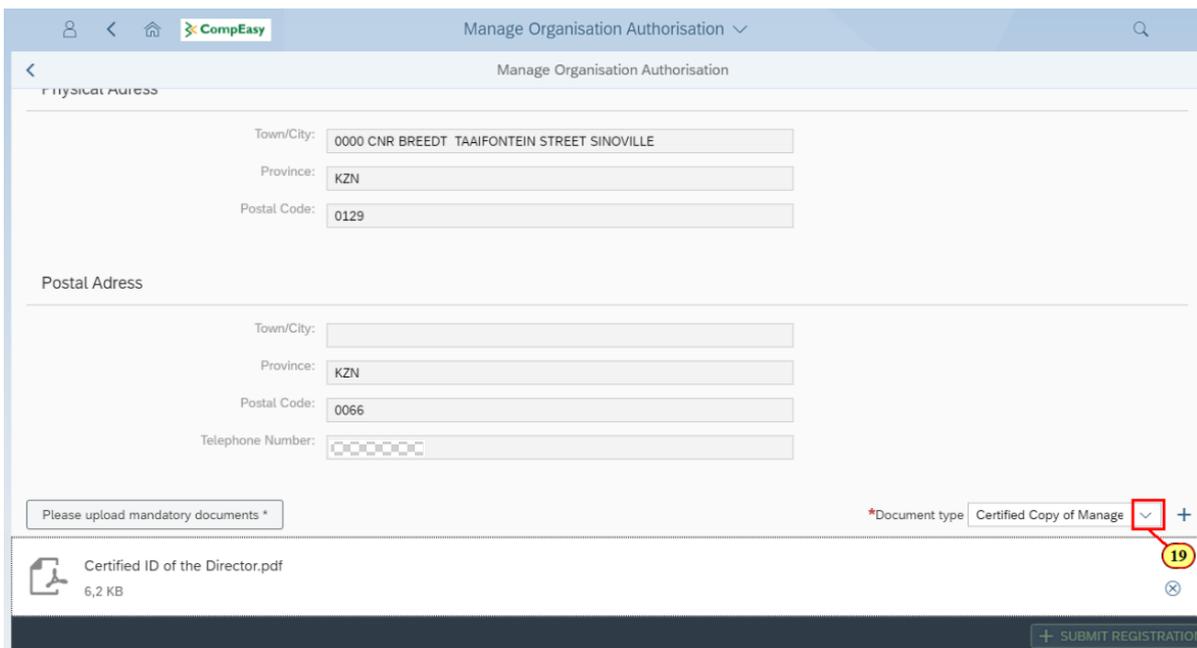
Step	Action
[19]	Upload the **Document type** Certified Copy of Manager's ID
[20]	Upload the **Document type** Company Registration Certificate - CIPC
[21]	Upload the **Document type** Certified User ID or Passport of the User
[22]	Upload the **Document type** Proof of Business Address

1.1.17. Submit the Registration

Step	Action
[23]	Click the **SUBMIT REGISTRATION** + SUBMIT REGISTRATION button to submit registration.

1.1.18.   Submitted Registration Message
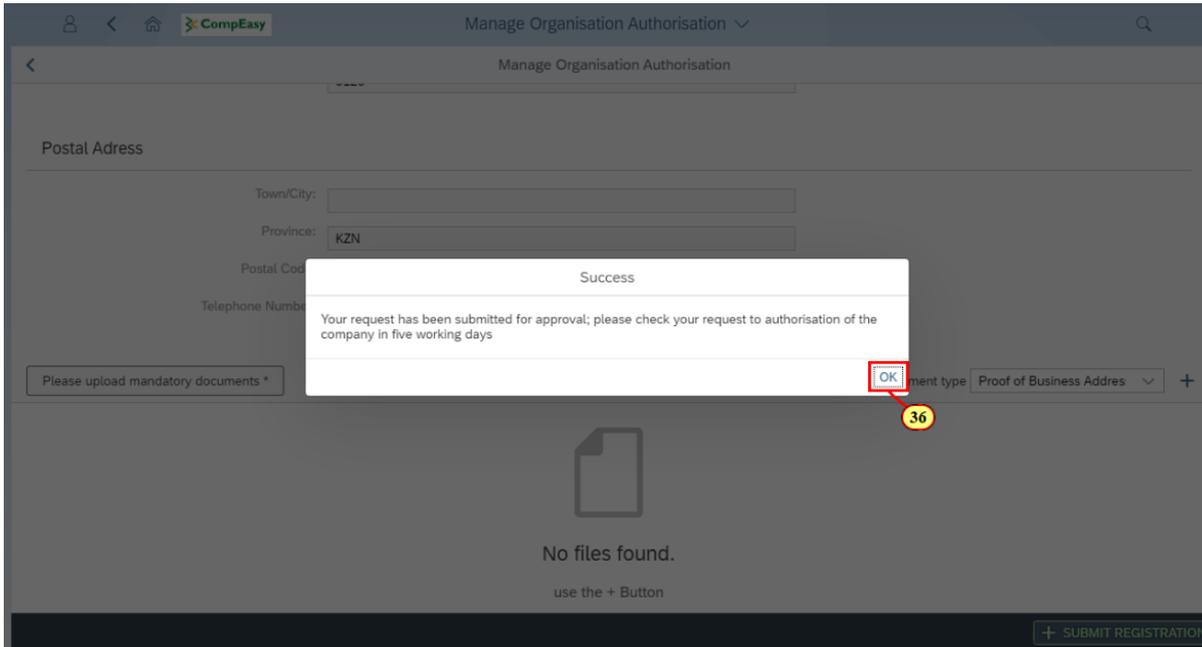
Step	Action
[24]	Click the **OK** [OK] button to acknowledge the message.

1.1.19.   Display the New Registration
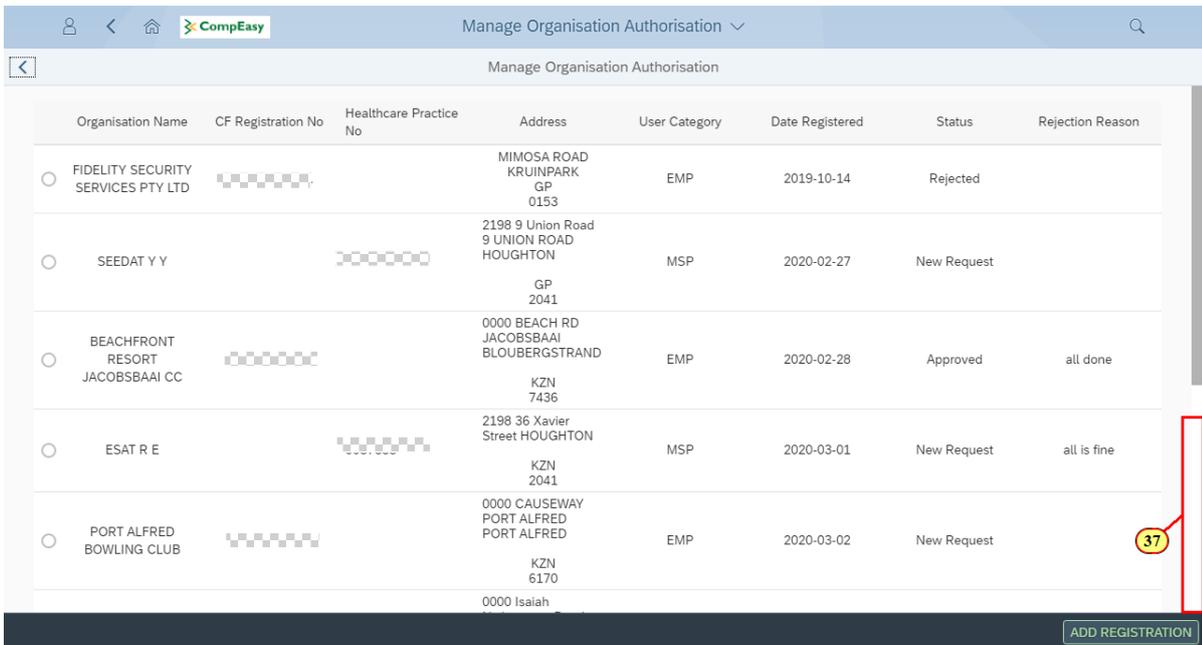
Step	Action
[25]	Click in the **area below the scroll bar** to scroll down.

1.1.20.   Display the New Registration (2)

	The Submitted request will appear as the New Request. Please note that the request will take up to 5 workings days to approve. The status will be reflected on the Organisation Authorisations list.

	Well done! You have successfully registered a new request for additional organisation authorisation on their user profile.

1.2. Manage Organisation Authorisation – Healthcare User

Purpose
The purpose of this application is for external Healthcare Users to request additional organisation authorisation on their user profile.
Business Scenario
In this scenario the Healthcare User will request an additional organisation authorisation on their user profile.
Prerequisites
The following prerequisites are applicable when processing this transaction: • Healthcare user is registered on the CompEasy System • Able to navigate CompEasy System

1.2.1. Process Description

The process followed is the same as in the previous scenario for the Employer User but with two (2x) differences in the procedure, namely:

- The User type selection is "**Healthcare User**"

- The Mandatory Documents list is unique for Healthcare User Registration, including the following:

  o Certified User ID or Passport of the User

  o Certified Copy of Manager's ID

  o Proof of Business Address

  o Health Practice Registration Certificate from BHF

(i)	The Submitted request will appear as the New Request. Please note that the request will take up to 5 workings days to approve. The status will be reflected on the Organisation Authorisations list.

1.3. Manage Organisation Authorisation – 3rd Party User

Purpose
The purpose of this application is for external 3rd Party Users to request additional organisation authorisations on their user profile.
Business Scenario
In this scenario the 3rd Party User will request an additional organisation authorisation on their user profile.
Prerequisites
The following prerequisites are applicable when processing this transaction: • The 3rd Party user is registered on the CompEasy System   • Able to navigate CompEasy System

1.3.1. Process Description

The process followed is the same as in the previous scenarios for the Employer User and the Healthcare User but with three (3x) differences in the procedure, namely:

- The User must select **"Yes"** at the option: **Are you a 3rd Party acting on behalf of the Organisation?**

- The User type selection is ether **"Employer User" or "Healthcare User"**

- The Mandatory Documents list is extended to include the **additional** document:

  o Power of Attorney Letter from either the Employer, or the Healthcare Practice being represented.

The Submitted request will appear as the New Request. Please note that the request will take up to 5 workings days to approve. The status will be reflected on the Organisation Authorisations list.