# Insurance Certificates

Supplier Portal - Quick Reference Sheet



### **Overview**

This Quick Reference Sheet (QRS) demonstrates how to enter new or view existing certificates through the Water Corporation's Supplier Portal.

The Water Corporation requires its suppliers and contractors to provide evidence of their insurance cover by way of Certificates of Currency. Insurance cover required under the contract must be in place prior to commencement of work under the contract and must be maintained for the duration of the contract on terms and conditions acceptable to the Water Corporation.

The Water Corporation will require you to provide Certificates of Currency when bidding for new contracts and to lodge new certificates via this transaction when insurances are renewed.

#### **Things You Need To Know**

Insurance certificate requirements based on the conditions of contract entered into with the Water Corporation.

You will receive an email notification when the insurance certificate is in renewal and expired status as a reminder to submit new information.

#### **Features Covered**

- Entering Insurance Certificate Details
- View or Change or Copy Insurance Details

#### **Entering Insurance Certificate Details**

1. From the **Supplier Transactions** menu click **Insurance Certificates**.

Supplier Transactions Bids / Tenders Purchase Orders Supplier Profile OSH Performance Statistics Insurance Certificates Security Variation Claim Tell us what you do ABAP Function Modules Manage Documentation

## The *Insurance Certificate* screen displays.

The initial screen shows a list of all insurance details, validity dates and the status.

Use the status drop down list to restrict information shown.

2. Select **Create** to enter new certificate details.

**Note:** Use the Copy button as an alternative to creating a new insurance certificate record. Change the dates and any other relevant information and **Submit**.



## **Insurance Certificates**

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3. Complete all fields providing information of the insurance certificate.

Use the **Insurer (Other)** field if your insurance provider is not available in the insurer selection.

*Note:* Use this icon **I** to select from a drop down list.

- 4. To attach a copy of the Certificate of Currency, click **Browse**.
- 5. **Locate** and **select** the document from your computer.
- 6. Click **Attach**.
- 7. Click **Submit** to add the insurance item.

## The *Insurance Certificate* screen displays the new insurance.

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upplier Details								
Supplier Number:								
Supplier Name:								
surance Certificate Detail	s							
Policy Number: *	12345							
From Date: *	01.07.2016		[7]					
To Date: *	30.08.2017		(T)					
Type of Insurance: *	03 🗂 Info	mation Technolo	gy Liability					
Insured Amount: *		30,000	,000.000					
Currency:		4IRAI						
Insurer (Other):	ADA P ADA	MINAL						
Status: *	S Sub	mitted						
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Supplier No.:								
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Type of Insurance	From Date	To Date	Status	Insured Amount	Currency	Policy Number	Insurer	
Information Technolog	01.07.2016	30.08.2017	Submitted	30,000,000.00	AUD	12345	ADM	Ī
Public Liability	01.05.2015	30.04.2016	Submitted	20,000,000.00	AUD	12346577991	. LLO	
Workers Compensation	30.04.2015	30.04.2016	Submitted	50,000,000.00	AUD	115773441241	ACE	F
Motor Vehicle	30.04.2014	30.04.2015	Submitted (Non-chang	30,000,000.00	AUD	573334999273	ZUR	

### View or Change or Copy Insurance Details

- 1. Highlight the line by clicking the grey box to the left of the line  $\square$ .
- 2. Select either:
  - **Display** to view the details;
  - Change to edit the details; or
  - **Copy** to create a new certificate based on the existing item.

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Insurance requiremen	ts are based on	the type of contra	oct entered into with the Wat	er Corporation				*
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## **Insurance Certificates**

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## The **Insurance Certificate** details

- appear either in:
- **Display** mode.



 Supplier Details

 Supplier Number:

 From Date:
 10245

 From Date:
 10245

 Type of Insurance:
 001 Information Technology Liability

 Insure:
 ADD

 Insure:
 ADD

 Insure:
 603 ADURAL

 Insure:
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 Insurance Documents
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Insurance Certificate

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#### • Change mode.

**Note:** You are only able to change insurance certificate information while in **Submitted** status.

Insurance Certificate Attach a copy of the certificate of currency and submit the details Supplier Number Supplier Name Certificate Details Policy Number: \* 12345 From Date: \* 01.07.2016 To Date: \* 30.06.2017 Type of Insurance: \* 03 m Information Techn 5 7 logy Liabilit red Amount: \* \_\_\_\_\_ Currency: \* AUD 30,000,000.00 n T Insurer: ADM urer (Other): Status: \* S Submitted Browse... Linked Document: Attach File Type Dog Detai Appr

• Copy mode.

**Note:** Copy button creates a new insurance record based on an existing record. The dates and any other relevant information will need to be updated before submitting.

