

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.

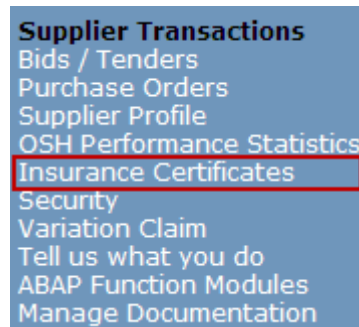
You will receive an email notification when the insurance certificate is in renewal and expired status as a reminder to submit new information.

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**.



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**.

The screenshot shows the 'Insurance Certificate' screen. It includes a header with instructions, a search criteria section, and a table of insurance details. The table has columns for Type of Insurance, From Date, To Date, Status, Insured Amount, Currency, Policy Number, and Insurer. Below the table are buttons for Change, Display, Approvals, Copy, and Create.


Type of Insurance	From Date	To Date	Status	Insured Amount	Currency	Policy Number	Insurer
Public Liability	01.05.2015	30.04.2016	Submitted	20,000,000.00	AUD	9324673412	LLO
Workers Compensation	30.04.2015	30.04.2016	Submitted	50,000,000.00	AUD	12346577991	ACE
Motor Vehicle	30.04.2014	30.04.2015	Submitted (Non-chang...	30,000,000.00	AUD	115773441241	ZUR

Insurance Certificates

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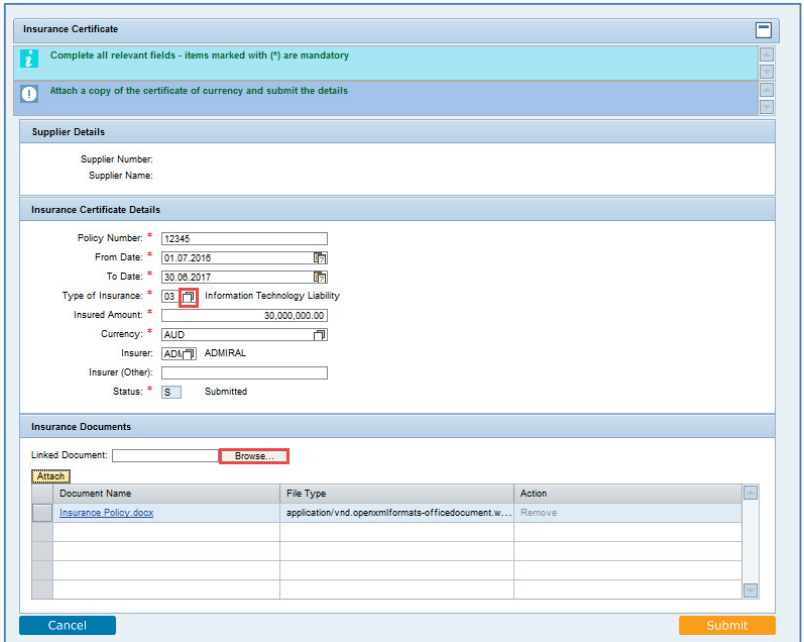
- Complete all fields providing information of the insurance certificate.

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

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

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

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



Insurance Certificate

Complete all relevant fields - items marked with (*) are mandatory

Attach a copy of the certificate of currency and submit the details

Supplier Details

Supplier Number:
Supplier Name:

Insurance Certificate Details

Policy Number: * 12345
From Date: * 01.07.2016
To Date: * 30.06.2017
Type of Insurance: * 03 Information Technology Liability
Insured Amount: * 30,000,000.00
Currency: * AUD
Insurer: ADMIRAL
Insurer (Other):
Status: * Submitted

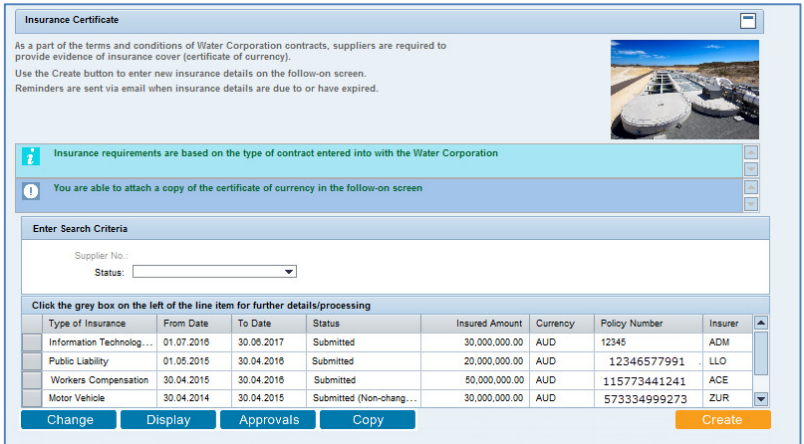
Insurance Documents

Linked Document: **Browse...**

Attach

Document Name	File Type	Action
Insurance_Policy.docx	application/vnd.openxmlformats-officedocument.w...	Remove

Cancel **Submit**



Insurance Certificate

As a part of the terms and conditions of Water Corporation contracts, suppliers are required to provide evidence of insurance cover (certificate of currency).
Use the Create button to enter new insurance details on the follow-on screen.
Reminders are sent via email when insurance details are due to or have expired.

Insurance requirements are based on the type of contract entered into with the Water Corporation

You are able to attach a copy of the certificate of currency in the follow-on screen

Enter Search Criteria


Supplier No.:
Status:

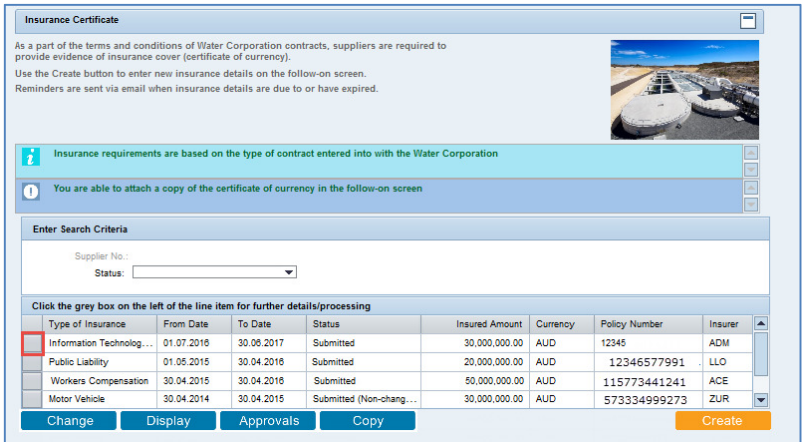
Click the grey box on the left of the line item for further details/processing

Type of Insurance	From Date	To Date	Status	Insured Amount	Currency	Policy Number	Insurer
Information Technolog...	01.07.2016	30.06.2017	Submitted	30,000,000.00	AUD	12345	ADM
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
Motor Vehicle	30.04.2014	30.04.2015	Submitted (Non-chang...	30,000,000.00	AUD	573334999273	ZUR

Change **Display** **Approvals** **Copy** **Create**

View or Change or Copy Insurance Details

- Highlight the line by clicking the grey box to the left of the line .
- 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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Enter Search Criteria

Supplier No.:
Status:

Click the grey box on the left of the line item for further details/processing

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Change **Display** **Approvals** **Copy** **Create**

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The **Insurance Certificate** details appear either in:

- **Display** mode.

Insurance Certificate

Complete all relevant fields - items marked with (*) are mandatory

1 Attach a copy of the certificate of currency and submit the details

Supplier Details

Supplier Number:
Supplier Name:

Insurance Certificate Details

Policy Number: * 12345
From Date: * 01.07.2016
To Date: * 30.06.2017
Type of Insurance: * 03 Information Technology Liability
Insured Amount: * 30,000,000.00
Currency: * AUD
Insurer: ADI ADMIRAL
Insurer (Other):
Status: * S Submitted

Insurance Documents

Detail	File Type
Insurance_Policy.docx	application/vnd.openxmlformats-officedocument.wordprocessingml.document

Cancel Approvals

- **Change** mode.

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

Insurance Certificate

Complete all relevant fields - items marked with (*) are mandatory

1 Attach a copy of the certificate of currency and submit the details

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Supplier Number:
Supplier Name:

Insurance Certificate Details

Policy Number: * 12345
From Date: * 01.07.2016
To Date: * 30.06.2017
Type of Insurance: * 03 Information Technology Liability
Insured Amount: * 30,000,000.00
Currency: * AUD
Insurer: ADI ADMIRAL
Insurer (Other):
Status: * S Submitted

Insurance Documents

Linked Document: Browse...

Attach

Document Name	File Type	Detail
Insurance_Policy.docx	application/vnd.openxmlformats-officedocument.w...	Remove

Cancel Approvals Submit

- **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.

Insurance Certificate

Complete all relevant fields - items marked with (*) are mandatory

1 Attach a copy of the certificate of currency and submit the details

Supplier Details

Supplier Number:
Supplier Name:

Insurance Certificate Details

Policy Number: * 12345
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Currency: * AUD
Insurer: ADI ADMIRAL
Insurer (Other):
Status: * S Submitted

Insurance Documents

Linked Document: Browse...

Attach

Document Name	File Type	Action
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Cancel Submit