

Government of Western Australia Department of Training and Workforce Development

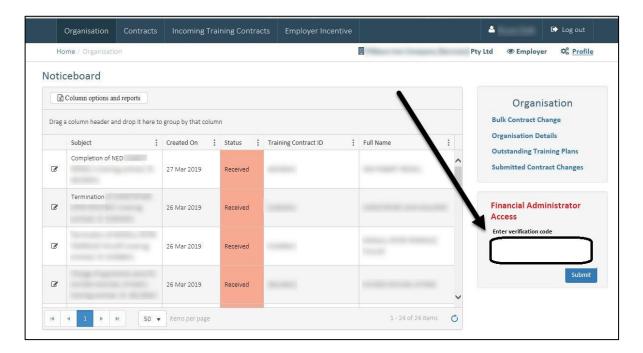


Financial administrator

Appointing the financial administrator

Your financial administrator will need to have a WAAMS portal account linked to your organisation. The organisation contact who is appointed by the CEO to be the financial administrator will log in to the portal and enter the verification code provided from the *Organisation* screen, as shown in the following screenshot.

If your organisation does not yet have any portal users, create a portal account by selecting 'Don't already have a login?' in the WAAMS client portal: <u>waamsportal.dtwd.wa.gov.au</u>.



For help with adding a new contact to your organisation, please refer to the instructional video *WAAMS* – *Invite others from your organisation to use the WAAMS portal* on the Apprenticeship Office website at <u>dtwd.wa.gov.au/waams</u>.

Appointing additional financial administrators within the organisation

Additional financial administrators can only be appointed by other financial administrator users with this access role.

To appoint another financial administrator, log in to the WAAMS client portal and navigate to the **Organisation page** from your home page. Select the **Manage Financial Administrators** on the right side of the screen. This will then take you to **Organisational Contacts**.

By selecting the **Edit** button beside the organisation contact who requires financial administrator access, as shown in the screenshot below, you will be taken to their user profile. This will only be visible to organisational contacts who have financial administrator access.

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M	4 1 F	N 50 V	items per pag	(e					1 - 24 of 24 items	C	Only visible to Financ	al Adminstrators

1 Select the pencil icon to edit the organisational contact.

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hontage	Y	JOD I ITIE	Y Portal Account?	Ticc user?		El User?	T Fin Admin?	Y
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c —		Advisor Apprentice Support	Yes	Yes	Yes	Yes		

2 Once you are in the contact's edit screen, select the box **Is Financial Administrator?** and then select the **Submit** button.



Reassigning and removing financial administrators

Only financial administrators can re-assign and remove the financial administrator access of other WAAMS users. If your financial administrator is leaving the organisation, and their portal account will be deactivated, it is important that they first assign this access to another authorised person.

If your financial administrator has left the organisation without assigning a new financial administrator, please contact the employer incentive help desk on 13 19 54.

Responsibilities of the financial administrator

The financial administrator/s have access to:

- assign and remove financial administrator access for other organisation contacts;
- manage the organisation's bank details;
- edit the organisation's payroll tax status; and
- view employer incentives and applications.

Declaring your organisation's payroll tax status

Employers will be asked to disclose whether they are liable to pay payroll tax, to determine if they are eligible to receive an incentive payment.

Only financial administrators can declare or edit your organisation's payroll tax status. All employers will need to complete this task before any employer incentive applications can be made.

1 Select Edit Payroll Tax Status.

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Then follow the prompts to update your payroll tax status.

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Organisation	Contracts	Incoming Training Contracts	Employer Incentive		Test Master	🕞 Log out
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Are you currently liable	to payroll tax in	Western Australia for this financial	year?			
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Employer - Is Payroll Tax	Liable?					

What are the different access levels for employer WAAMS users?

There are five types of user access roles within WAAMS for employers. You can assign as many (or as few) of these access levels to an organisation contact, and modify as required. Each access role has limitations on what can be viewed and edited.

User role	What does this mean	How to get this access
El base user	 Has read-only access to training contracts and organisation details 	 Default access level following an invitation to WAAMS from the organisation administrator
El user	 Has read-only access to the training contracts and organisation details 	Organisation administration can assign EI user
	Can submit and manage the employer incentive claims	
TCC user	Can create training contract changes (TCCs) on behalf of the	Default from existing pre-El employer users
	parties to the contract	Organisation administrator can assign TCC user
Financial administrator	Can edit the organisation's bank details and payroll tax status	Financial administrator verification code
	Can manage other financial administrator users	Other financial administrators
	 Has read only access to employer incentives 	
	 Has read only access to training contracts and organisation details 	
Organisation administrator	 TCC user permissions Can create edit organisation details including managing the 	Auto-generated invitation to WAAMS at training contract registration
	organisation's contacts and WAAMS users	Apprenticeship Office staff, on request from the organisation

Further information:

If you require any assistance with WAAMS, please contact Apprenticeship Office on 13 19 54 or email at <u>rai.projects@dtwd.wa.gov.au</u>.