



## 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 on 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: [waamsportal.dtwd.wa.gov.au](http://waamsportal.dtwd.wa.gov.au).

The screenshot shows the 'Organisation' page in the WAAMS portal. The top navigation bar includes 'Organisation', 'Contracts', 'Incoming Training Contracts', and 'Employer Incentive'. The main content area is titled 'Noticeboard' and contains a table with columns for Subject, Created On, Status, Training Contract ID, and Full Name. A black arrow points from the 'Status' column header to the 'Financial Administrator Access' section on the right. This section includes a 'Submit' button and a text input field for a verification code.

Subject	Created On	Status	Training Contract ID	Full Name
Completion of NED	27 Mar 2019	Received		
Termination	26 Mar 2019	Received		
	26 Mar 2019	Received		
	26 Mar 2019	Received		

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 [dtwd.wa.gov.au/waams](http://dtwd.wa.gov.au/waams).

## 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**.

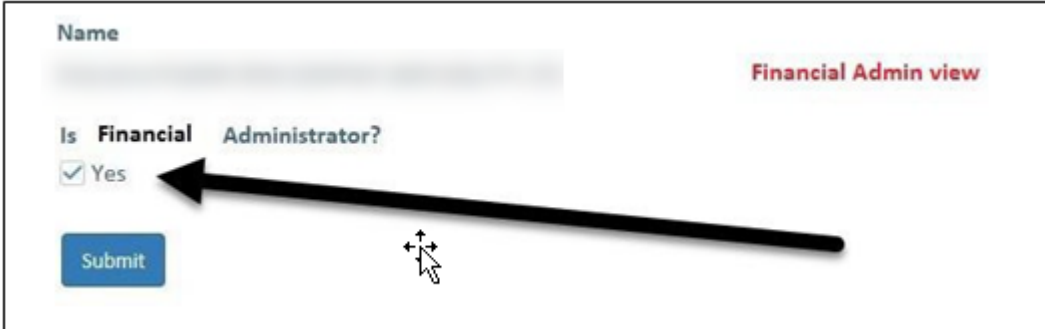
Select the **Edit** button beside the organisation contact who requires financial administrator access, as shown in the screenshot below. You will be taken to their user profile. This will only be visible to organisational contacts who have financial administrator access.

The screenshot shows the WAAMS client portal interface. At the top, there are navigation tabs: Organisation, Contracts, Incoming Training Contracts, and Employer Incentive. Below the tabs, there is a breadcrumb trail: Home / Organisation. The main content area is titled 'Noticeboard' and contains a table with columns: Subject, Created On, Status, Training Contract ID, and Full Name. The 'Status' column has a red background and contains the word 'Received'. To the right of the Noticeboard, there is a sidebar with the title 'Organisation' and several menu items: Bulk Contract Change, Organisation Details, Outstanding Training Plans, Submitted Contract Changes, and Manage Financial Administrators. The 'Manage Financial Administrators' button is highlighted with a red box and an arrow pointing to it. Below the arrow, there is a note: 'Only visible to Financial Administrators'.

1 Select the pencil icon to edit the organisational contact.

The screenshot shows the 'Organisational Contacts' page. At the top, there is an 'Add' button. Below it, there is a table with columns: Contact, Job Title, Portal Account?, TCC User?, Org Admin?, EI User?, and Fin Admin?. The 'Contact' column has a pencil icon next to each row, indicating the edit button. A black arrow points to the pencil icon in the first row. The table contains three rows of data. The first row has a blank Job Title, Portal Account?, TCC User?, and Fin Admin? columns, and a 'Yes' in the Org Admin? column. The second row has 'Advisor Apprentice Support' in the Job Title column, 'Yes' in the Portal Account? and EI User? columns, and 'Yes' in the Org Admin? and Fin Admin? columns. The third row has a blank Job Title column, 'Yes' in the Portal Account? and TCC User? columns, and 'Yes' in the Org Admin? and EI User? columns.

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



The screenshot shows a web form for editing a contact. At the top, there is a 'Name' field with a blurred input area. To the right of the form, the text 'Financial Admin view' is displayed in red. Below the name field, there is a section titled 'Is Financial Administrator?' with a checked checkbox labeled 'Yes'. A large black arrow points from the right towards the 'Yes' checkbox. Below this section is a blue 'Submit' button. A mouse cursor is visible over 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 Apprenticeship Office 13 19 54 and press option 2 to speak to the employer incentive help desk.

### **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 claims.

### **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 who employ apprentices will need to complete this task before any employer incentive applications can be made.

### 3 Select Edit Payroll Tax Status.

Government of Western Australia  
Department of Training  
and Workforce Development

WAAMS

We're working for  
Western Australia.

Organisation Contracts Incoming Training Contracts Employer Incentive Test Master Log out

Home / Organisation / Organisation Details

Employer

Legal Name

Business Name

ABN

The ABN is the legal identifier of a business and a change to it means a change of legal entity for the employer to a training contract. Therefore the assignment (transfer) of training contract process should be followed to transfer the training contract from a legal entity to another.

Organisation  
Edit Bank Account Details  
Edit Organisation Details  
Edit Payroll Tax Status

Then follow the prompts to update your payroll tax status.

Organisation Contracts Incoming Training Contracts Employer Incentive Test Master Log out

Home / Organisation / Organisation Details / Edit Payroll Tax Status

Employer

Payroll Tax Status

Financial Year

Are you currently liable to payroll tax in Western Australia for this financial year?

Not Answered  
Yes  
No

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
WAAMS base user (no permissions)	<ul style="list-style-type: none"> <li>Has read-only access to training contracts and organisation details</li> </ul>	<ul style="list-style-type: none"> <li>Default access level following an invitation to WAAMS from the organisation administrator</li> </ul>
EIS user	<ul style="list-style-type: none"> <li>Has read-only access to the training contracts and organisation details</li> <li>Can submit and manage the employer incentive claims</li> </ul>	<ul style="list-style-type: none"> <li>Organisation administration can assign EIS user</li> </ul>
TCC user	<ul style="list-style-type: none"> <li>Can create training contract changes (TCCs) on behalf of the parties to the contract</li> </ul>	<ul style="list-style-type: none"> <li>Default from existing pre-EIS employer users</li> <li>Organisation administrator can assign TCC user</li> </ul>
Financial administrator	<ul style="list-style-type: none"> <li>Can edit the organisation's bank details and payroll tax status</li> <li>Can manage other financial administrator users</li> <li>Has read only access to employer incentives</li> <li>Has read only access to training contracts and organisation details</li> </ul>	<ul style="list-style-type: none"> <li>Financial administrator verification code</li> <li>Other financial administrators</li> </ul>
Organisation administrator	<ul style="list-style-type: none"> <li>TCC user permissions</li> <li>Can create edit organisation details including managing the organisation's contacts and WAAMS users</li> </ul>	<ul style="list-style-type: none"> <li>Auto-generated invitation to WAAMS at training contract registration</li> <li>Apprenticeship Office staff, on request from the organisation</li> </ul>

### Further information:

If you require any assistance with WAAMS, please contact Apprenticeship Office on 13 19 54 or email at [rai.projects@dtwd.wa.gov.au](mailto:rai.projects@dtwd.wa.gov.au).