Australian Government
Clean Energy Regulator

RENEWABLE ENERGY TARGET

Client Portal user guide

For Renewable Energy Target participants

October 2020

Contents

What is the Client Portal?

The Client Portal is a secure entry point where participants can access online forms, systems, and other information. The Client Portal supports:

- organisations applying for exemption certificates, submitting real time data or equivalent for their notice of certifiable amount, or liable entity's reporting exemption certificates under the *Renewable Energy (Electricity) Act 2000* (the Act)
- 'Organisation Administrators' to manage individual users of companies or accounts
- individual users to manage their own account
- to complete and submit application forms
- to notify the regulator of site changes that may affect the use amount formula or certifiable amount
- access to the REC Registry.

Users access to the Client Portal is dependent on whether you have been granted the relevant permissions and roles to act on behalf of your organisation. You can be given permissions and roles as part of an application process, by an organisation administrator or by the Clean Energy Regulator (the agency).

The Client Portal[1] can be accessed from the agency's website.

Signing up and logging in to the Client Portal

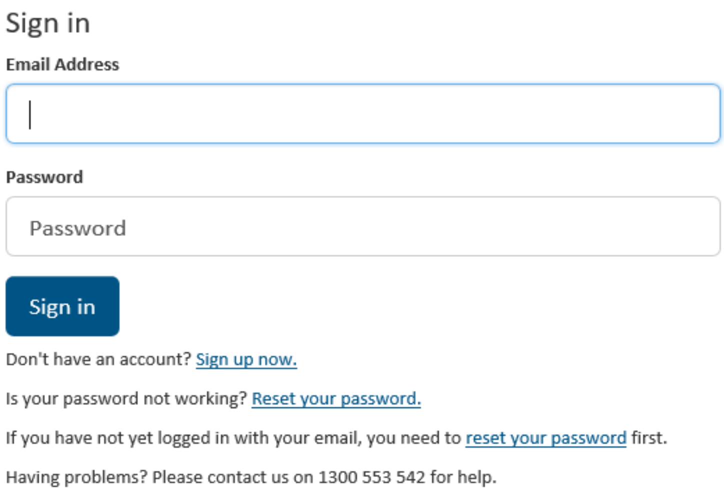
If you do not already have a Client Portal account, you need to sign up to the Client Portal. To do this, select the 'Sign up now' link, from the Client Portal login page. You will then be asked to:

- provide basic identifying details (name, contact details, and address), that will be used to create your Client Portal account
- enter a password (you will use this password with your email address to log in to the Client Portal).

Once the user submits this information, you will receive an email to verify the creation of your Client Portal account via email. Click on the link contained in the email. The link will take the user to the Client Portal and they will be asked to enter login details. Once authenticated, the sign up process is complete.

[1] https://portal.cleanenergyregulator.gov.au/

Figure 1: Client Portal sign in screen

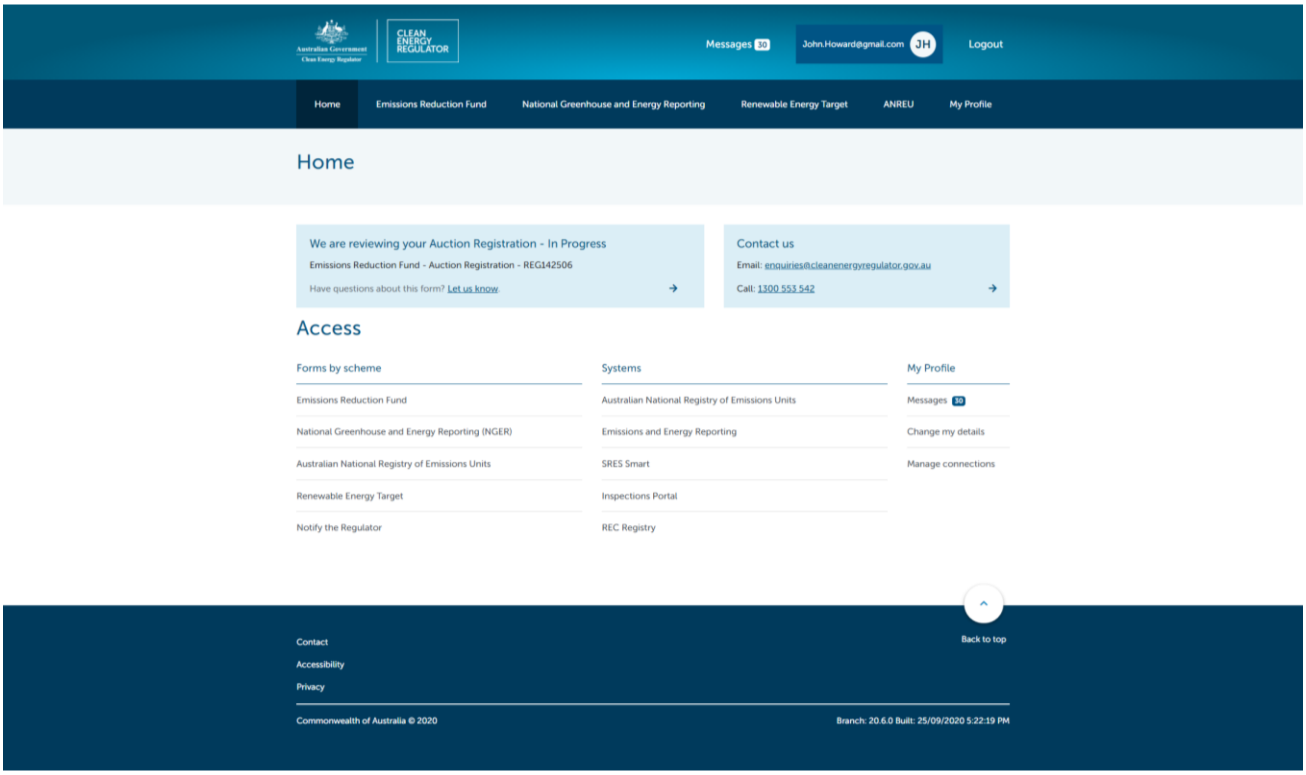


What does the Client Portal enable users to do?

When you log on you will see the following screen. This is your home page which allows easy access to other Client Portal functions. For Renewable Energy Target (RET) purposes you should concentrate on the:

- **Renewable Energy Target**
  - » This section of the Client Portal allows RET participants to view and apply for exemption certificates and to include solar water heaters as eligible under the RET.
- **My Profile**
  - » This section of the Client Portal allows users to update details (name, phone number, head office address and head postal address), and reset their Client Portal password. This section includes the Client Portal user ID which is needed when providing access to organisations and submitting forms.
- **Messages**
  - » This section is where the user will receive messages in relation to schemes that the organisation(s) participate in. Whenever a new message is available the user will receive an email advising them to log in to the Client Portal and view it.
  - » For emissions-intensive trade-exposed (EITE) activity and liable entities, messages can include the exemption certificate letter, exemption determination tool, the notice of certifiable amount letter and requests for additional information.

Figure 2: RET section of the Client Portal



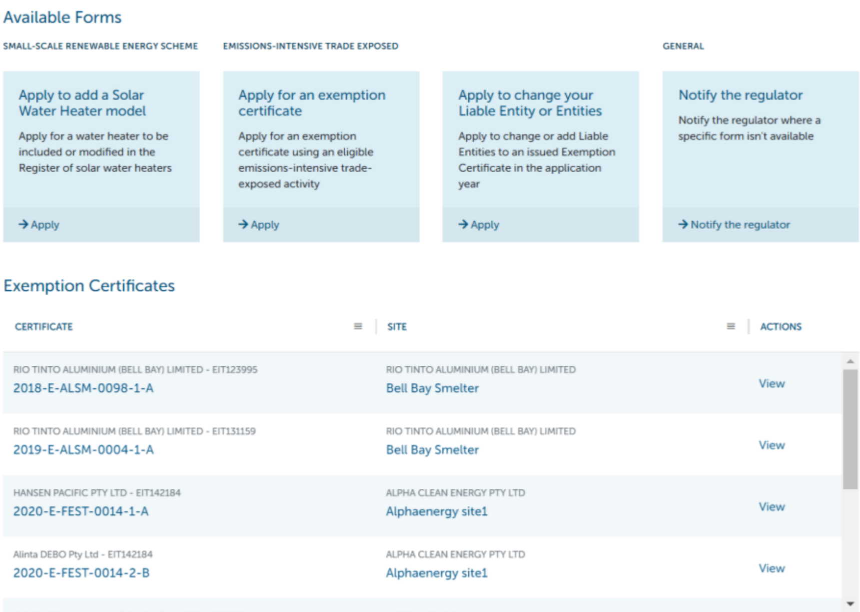
What does the Renewable Energy Target section of the Client Portal enable users to do?

The RET section of the Client Portal allows RET participants to lodge applications, amendments and notifications to the agency where those forms are not available in the REC Registry or on the agency's website.

For EITE entities

EITE entities use the Client Portal to apply for exemption certificates, apply for amendments and notify the regulator of a change. They also enter and submit real time data or equivalent for their notice of certifiable amount using the exemption determination tool. The tool is located by clicking on the issued exemption certificate.

Figure 3: this screen shows the forms available for RET participants to fill out in the Client Portal



For liable entities

If they have the permission and role they can enter and submit real time data or equivalent for their EITE customer’s notice of certifiable amount using the exemption determination tool. The tool is located by clicking on the issued exemption certificate.

User access and roles

User access is determined by roles. The available roles are as follows:

- Assigned by the company or automatically assigned when applying for exemption certificates
  - Organisation Administrator
  - Form Submitter
  - Executive Officers
  - Contact
- Assigned by the agency where individuals have not applied to the agency, or self-service is not available
  - Organisation Administrator
  - Primary Contacts.

It is possible for a user to have multiple roles. A user with access to multiple accounts may have different roles for each account.

Organisation Administrator role description

The 'Organisation Administrator' role allows the user to access the Client Portal self-service functionality. It enables a user to add or remove other users and to update roles. Multiple users in your organisation can be assigned the 'Organisation Administrator' role. A user with this role will be able to view and edit forms prepared by other users.

As roles related to an organisation change over time, it is important that organisations manage access to their accounts. This means nominating one or more Organisation Administrators is advisable.

Form Submitter role description

This role allows users to submit online forms.

If you lodge an exemption certificate application form for the first time you will automatically receive this role.

Primary Contact role description

The role relates to EITE and liable entities.

For EITE entities this role identifies the user that:

- requests for information about an application are directed to for response, and
- receives access to the exemption determination tool, exemption certificate letter and notice of certifiable amount letter.

For liable entities this role is required to access the exemption determination tool (optional), exemption certificate letter (required) or notice of certifiable amount letter (required). Both letters are required to complete the Energy Acquisition Statement / Renewable Energy Shortfall Statement in the REC Registry.

Executive Officer role description

An Executive Officer is defined as a:

- Director
- Chief Executive Officer (however described)
- Chief Financial Officer (however described), or
- Secretary (i.e. a company secretary).

Do not make a person an Executive Officer unless they meet the definition above. Otherwise, any reports submitted by that person on behalf of your organisation will be invalid. It is recommended that organisations establish more than one Executive Officer for redundancy and assurance of being able to authorise applications.

Contact role description

This role acts as a secondary contact when the primary contact is not available. They will not have access to the exemption determination tool, exemption certificate letter or the notice of certifiable amount letter.

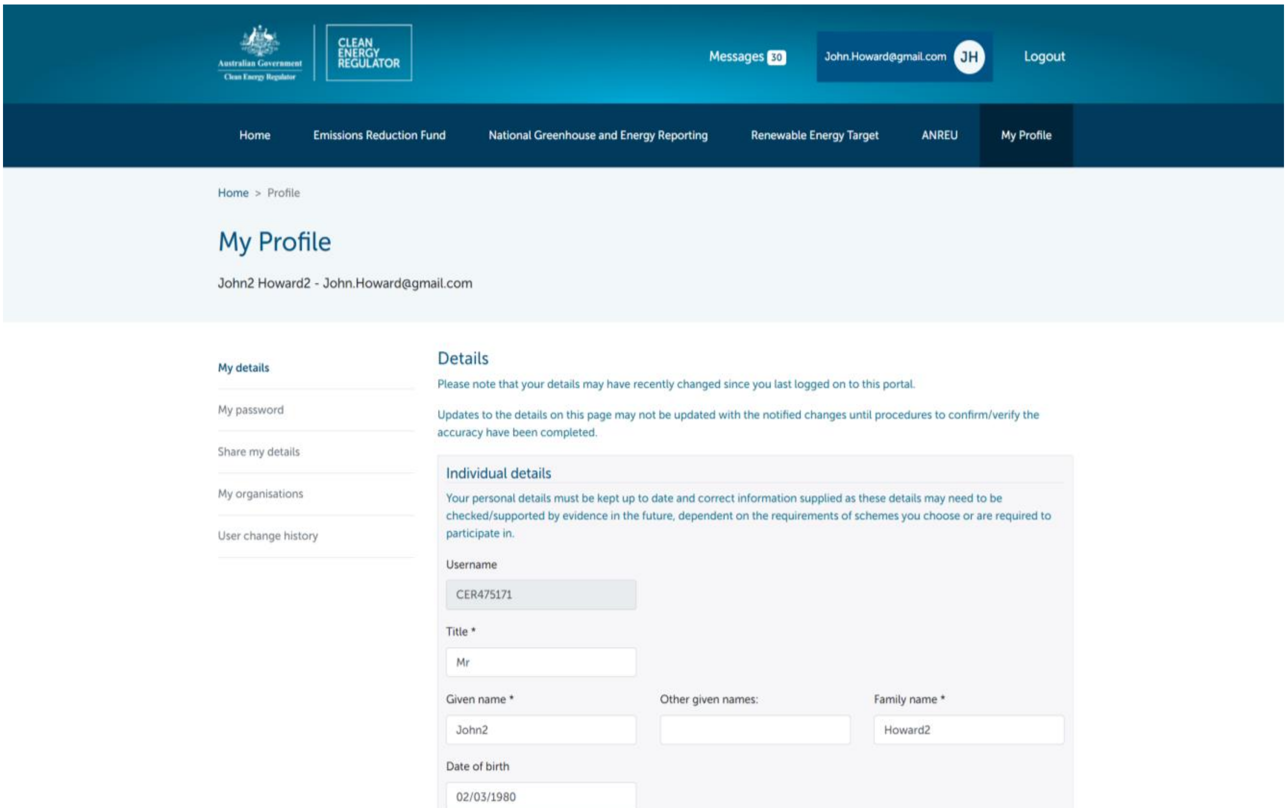
What does the 'My Profile' section of the Client Portal give me access to?

Depending on your access you will be able to:

- update your details under 'My details'
- update your password under 'My password'
- share your Client Portal user ID and email under 'Share my details'
- manage users and organisation information under '[My organisations]'
- view user history under 'User change history'.

All these items are found in the left-hand navigation of the page.

Figure 4: the 'My Profile' section of the Client Portal

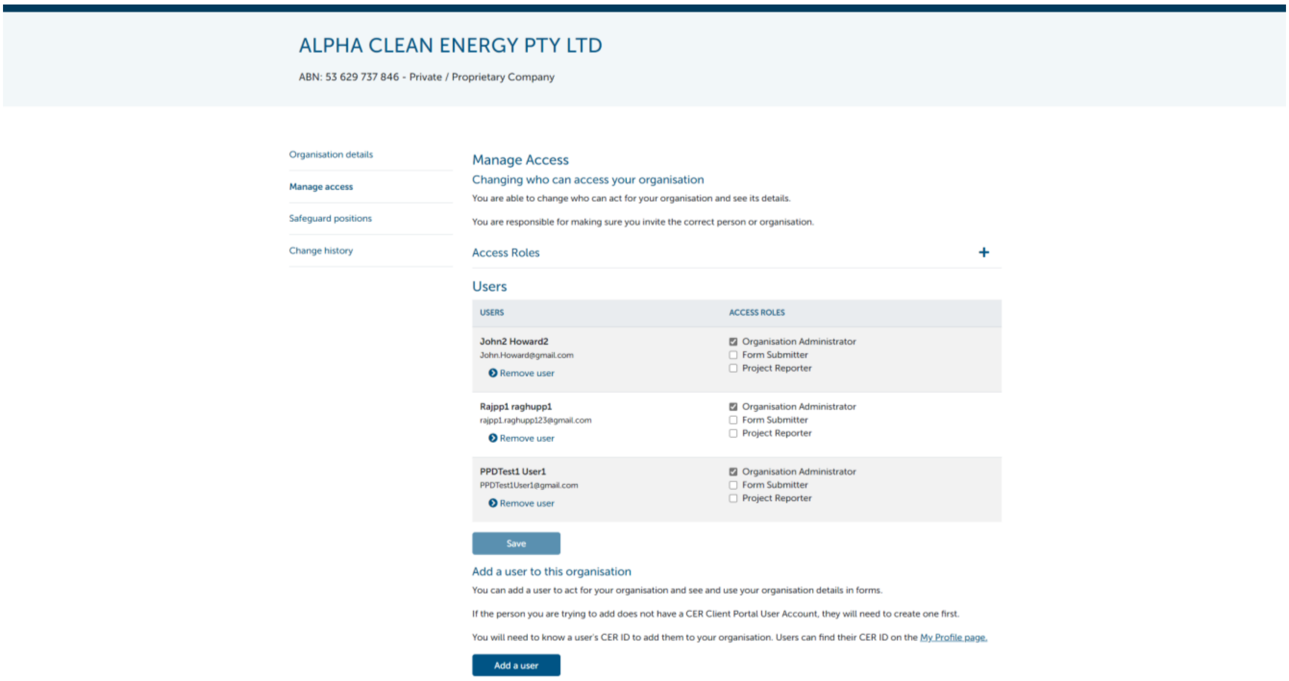


How do I manage 'My organisations'?

As an 'Organisation Administrator' from the 'My organisations' page you will be able to perform the following actions for one or more accounts after you click 'Manage' for the account:

- Update your 'Organisation details', such as addresses.
- Manage user access under 'Manage access', such as give and remove roles to users, add users and remove users.
- Manage 'Safeguard positions', not applicable for RET purposes.
- View the 'Change history'.

Figure 5: the 'My organisations' page within the 'My Profile' section of the Client Portal



Add a user

If you want to link a new person to your organisation, choose the 'Add a user' option at the bottom of the 'Manage Access' screen.

The user you wish to add must already have a Client Portal account. To add them, enter their Client Portal user ID and the email address associated with their account in the fields provided.

Once your new user has been successfully added, you will be taken back to the list of users for your organisation. Your new user should appear in the table.

Edit an existing user

You can add or remove a role from a person who has already been given access to your organisation by using the check boxes.

Remember to select 'Save' at the bottom of the screen when you finish.

Remove a user

To remove an existing user's access from your organisation's account, select the 'Remove user' option next to that person. By doing this, the person will no longer have access to your organisation's account.

More information

Contact the agency for more information:

Phone: 1300 553 542 within Australia

Email: enquiries@cleanenergyregulator.gov.au

Website: www.cleanenergyregulator.gov.au