Electronic Certificatesof Compliance

Registering on and using eCoC





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PLEASE NOTE

- 1. After July 1st you must use the eCoC System to submit CoC's. Paper copies will no longer be accepted after this date
- 2. The eCoC System is protected by strong security measures. If you are inactive on the eCoC system for 15 minutes or longer you will be signed out. This is to protect your privacy. You will need to re-enter your password to continue if you are timed out.

1. REGISTERING FOR ECOC

Register for the eCoC system before following any other instructions in this manual, as this is required for all the functions of the system.

To Register please go to www.sa.gov.au/otr/ecoc

Click on *Register* and enter the information requested. You will need:

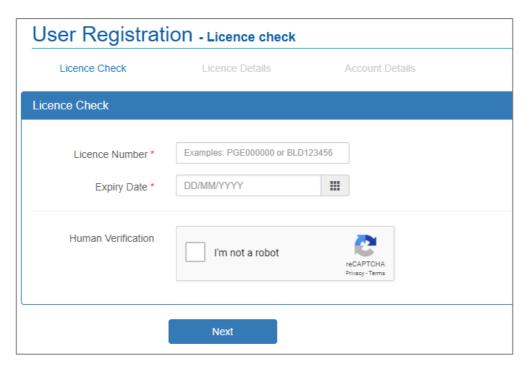
- · Your licence number and expiry date
- Your contact information







1.1 Step 1 of 3 – Licence Check

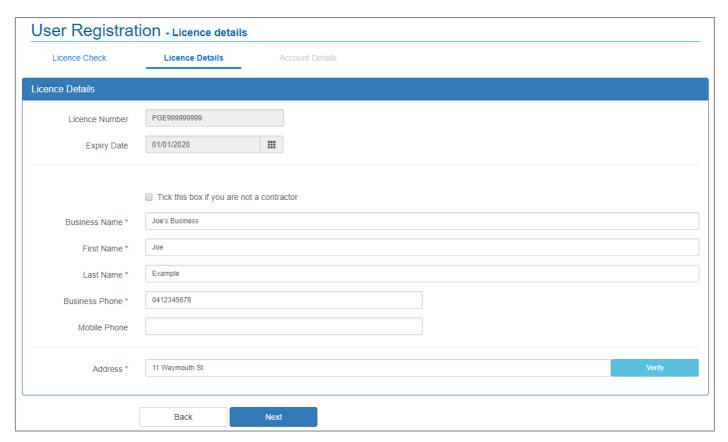


- 1. Enter your licence number using the format PGE123456 or BLD123456.
- 2. Enter your licence expiry date. Ensure that this is correct.
- 3. Click the box for **Human Verification** and follow the prompts it provides. This box is marked 'I'm not a robot'.
- 4. Once you have completed the verification, click **Next** to proceed to Step 2 of 3.





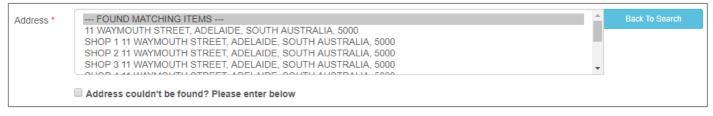
1.2 Step 2 of 3 – Licence Details



- 5. Enter your Business Name (if you're a contractor), and your First and Last names.
- 6. Enter your phone number or numbers.

Ensure there are no spaces in the phone number, for example a mobile phone number would be entered as 0412345678

7. Enter the first section of your address and click **Verify** to search for the address.



8. Pick an address from the list. If the correct address was not found, tick the 'Address couldn't be found?' box to enter the address manually.

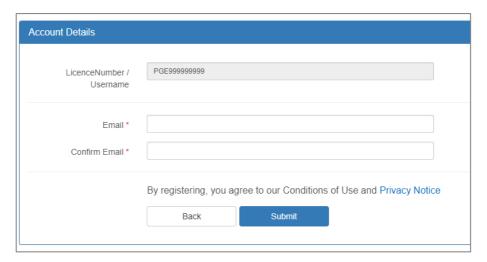
When manually entering an address, search for the postcode by typing the suburb name and clicking the magnifying glass button.

9. Click Next to continue.





1.3 Step 3 of 3 – Account Details



10. Enter your email address, then type it again to confirm.

Note that email addresses are used for password recovery, and so for security they must be unique to each eCoC account.

11. Once complete, click Submit.

Registration Successful

12. If your registration has been successful, you will receive an email inviting you to set a password for your eCoC account. Follow the link in that email to set a password, and your registration is complete.

Registration Under Review

- 13. If your registration is listed as under review, this indicates that one or more of the details submitted have not matched with the details on the Consumer and Business Services occupational licencing database.
 - The OTR will review your application, and will follow up with an email approving or rejecting your application.
- **14.** If your application is rejected, an email will be sent containing a link you can follow to alter the information and resubmit your application.



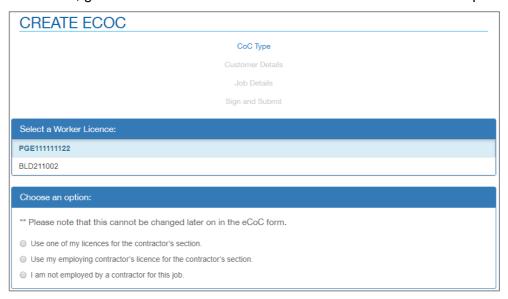


2. CREATING AN ELECTRICAL ECOC

This section assumes you are registered to use eCoC, please refer to the eCoC Registration section if you have not yet registered.

Go to www.sa.gov.au/otr/ecoc and sign in to your registered account. If you have not yet registered please go back to step 1 and register for your eCoC account.

15. To create a new eCoC, go to the Create eCoC tab located in the menu bar at the top of the screen.



- **16.** Select the *Licence Number* to use for the Worker's section of the eCoC (the worker signing this section must be appropriately licensed and able to certify).
- 17. Select which Contractor will sign the certificate. There will be 3 options presented:
 - Use one of my licences for the contractor's section.

This option applies if you are signing both as worker and contractor using the same licence number.

• Use my employing contractor's licence for the contractor's section.

This option applies if you are a worker employed by a contractor, or need to use a separate eCoC account for the contractor's section.

• I am not employed by a contractor for this job.

This option is applicable where a Contractor is not required, such as work without receiving reimbursement, or as an in-house worker.

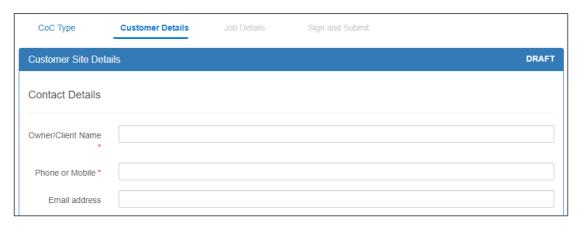
18. Select which industry the eCoC relates to, either Plumbing, Gas or Electrical.





2.1 Section 1 – Customer Details

Complete the details of the customer and the site on the first page of the eCoC form. When all fields are completed, click on Continue to proceed to the next page, and at which point a CoC number will be generated in the top right of the form.



- 19. Enter the Owner/Client Name, a contact phone number and their email address.
- 20. Note that the email address is not mandatory information. If an address is entered here, the customer will receive a copy of the certificate.

If an email address is not entered, the customer must still receive a copy of the eCoC, whether this be electronically or as a printed hard copy.



21. Enter the first part of the installation address and click on *Verify* – this opens a window of addresses from Location SA. Select the correct address from the list shown which will then complete the details.

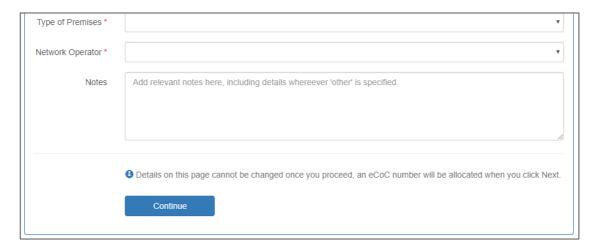
If an address could not be found, tick the box labelled *Installation Address couldn't be found?* to manually enter the address.

22. The next step is to enter the postal address. If the postal address is the same as the installation address, tick the 'Same as Installation Address box'. If the postal address is not the same as the installation address, use the search box to find and verify the address.

If an address could not be found, tick the box labelled *Installation Address couldn't be found?* to manually enter the address.







- **23.** Click on the *Type of Premises* dropdown menu and select a description that matches the installation such as House/Domestic or Industrial.
- 24. Select the Network Operator
- 25. Enter Notes if required.

Notes entered in this section are for internal reference only and will not print on the certificate.

26. Click *Continue* to generate an eCoC number and move to the next section.





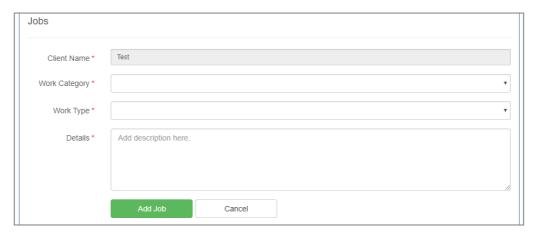
2.2 Section 2 – Job Details

Detail the start and finish dates, describe the work completed, and add documents in this section.

You can Save Draft at any time on this page by clicking the button at the bottom of the page.



1. Enter the Job Start date and estimated Completion Date. Review this information before the eCoC is certified.



2. Jobs are ways of describing the individual tasks completed as part of your work.

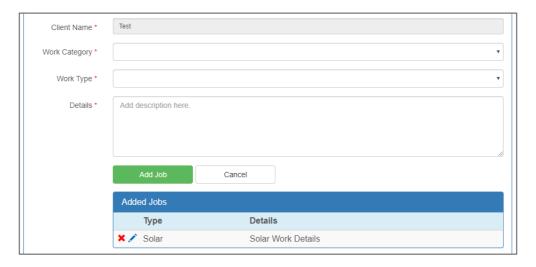
(Please follow this section step-by-step. When you are adding additional Jobs you will need to repeat the following four steps each time)

- 3. Select a Work Category such as New Install
- 4. Click the *Work Type* dropdown menu and select a general description of the work, such as *Solar* or *Other* which is used to describe most electrical work.
- 5. Describe the details of the work, and click **Add Job**. A list of added jobs will now appear.
- **6.** If there are additional works to describe, simply select another *Work Category* and *Work Type*, then enter the details of the work and click **Add Job**.

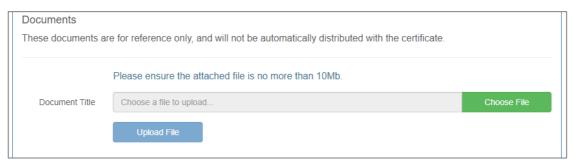
You can have any number of Jobs on one eCoC.







7. The next section allows you to attach documents to the eCoC, click Choose File, then find and attach a document. Click Upload File to save the document to the eCoC. Repeat this process for any extra attachments.



Files attached to an eCoC are available to the worker, the contractor and the OTR. They are not forwarded with the certificate to the customer or other parties.

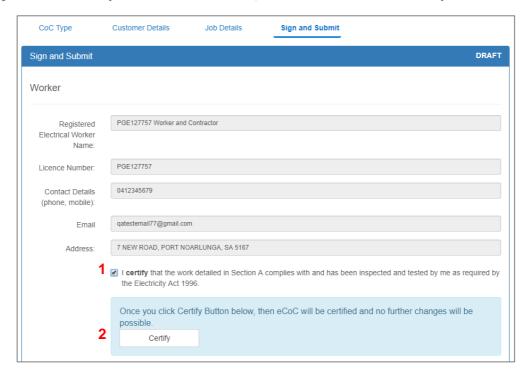
- 8. Declare any dangerous or non-compliant work in the Warning section.
- 9. Click Continue to save and progress to the Sign and Submit section of the eCoC.





2.3 Section 3 – Sign and Submit

Certify the work completed in this section, and enter details of extra parties to be notified.



- 1. Tick the I Certify... statement.
- 2. Click the Certify button.

Once an eCoC is certified, it cannot be altered so check your work before clicking the Certify button.

After the eCoC is certified, its Status will change from *Draft* to *Certified* which means the certificate is awaiting signing by the contractor.



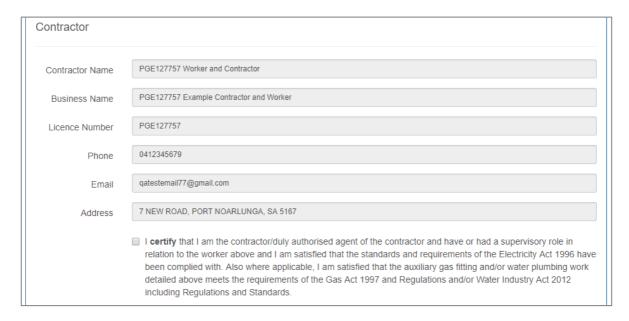
3. If there is any auxiliary gas fitting work to be certified, these sections will appear after the worker's section is certified. Scroll down to that section and tick where appropriate.

At this stage the worker's job is complete, and the contractor can sign and submit the eCoC. If you are also the contractor, then you must complete both sections.

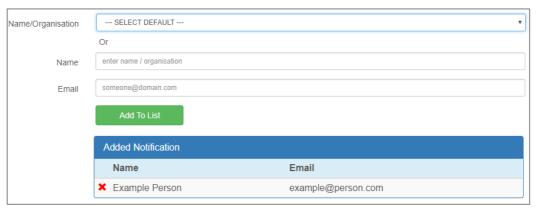
4. If you are using the same licence to sign as the Contractor for this job, scroll down to the Contractor section of the Sign and Submit screen. If you are using another licence to sign as contractor, sign out (by clicking your licence number at the top right) and sign into your Contractor's licence.







5. As with the worker's section tick the *I certify*... statement and click the *OK* button to confirm



- 6. The Notification List allows you to send extra copies of the eCoC to other parties. Either select one of the preset organisations (eg. Housing SA) or manually enter the name and email of another party and click *Add to List*.
- 7. Finally, click the *Submit* button at the base of the form to finalise the eCoC. At this stage a copy will be sent to: the contractor, the customer (if an email address was entered) and any other parties noted in the Notification List.

If the button is labelled Update, rather than submit – check that both the Worker and Contractor sections have been Certified.

You have now created and submitted an eCoC.



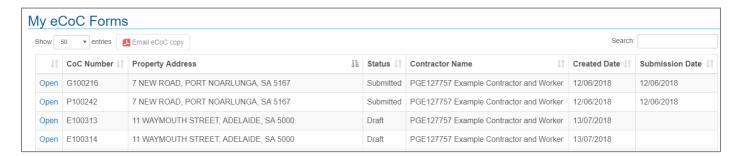


3. CONTRACTOR FEATURES

There are several features built in to eCoC for contractors. This section will include instructions on how to use these features and how to sign off an eCoC.

3.1 Signing an eCoC Certified by one of your Workers

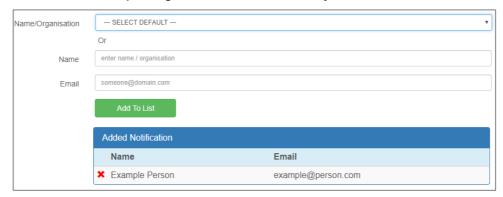
Commonly the contractor's role will be to view and submit eCoCs which have been created by your workers. This section assumes that you have already registered and added your workers, please see the *Registering for eCoC* and *My Workers* sections for instructions.



- 1. Sign into eCoC using your Contractor's licence number
- 2. Navigate to your My eCoCs screen
- 3. Open the eCoC you wish to sign by clicking or tapping the *Open* button.

To quickly find any certified eCoCs awaiting signoff, click the Status column heading – this will move any certified eCoCs to the top of the list

- 4. Read the information entered by your worker on *Step 1 Customer Details* and click the *Continue* button found at the bottom of the form when you are satisfied, or click on *Job Details*
- 5. Read the details entered on *Step 2 Job Details*. You can open the details of a particular Work Type by clicking on it in the list, and scrolling down. Click *Continue* again once satisfied, or click on Sign and Submit.
- Scroll to the lower section of Step 3 Sign and Submit and certify the Contractor's section.



- 7. The Notification List allows you to send extra copies of the eCoC to other parties. Either tick one of the preset parties (eg. Housing SA) or tick the box to manually enter another party.
- 8. Add the name and email address for the extra party, and click Add to List.
- Finally, click the Submit button at the base of the form to finalise the eCoC. At this stage a copy will be sent to: the contractor, the customer (if an email address was entered) and any other parties noted in the Notification List.

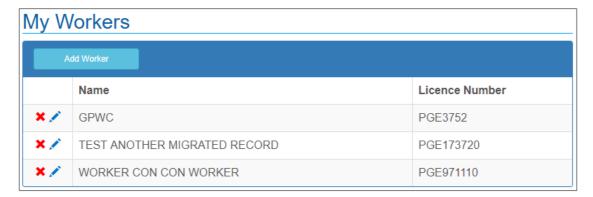
If the button is labelled Update, rather than submit – check that both the Worker and Contractor sections have been Certified.





3.2 My Workers

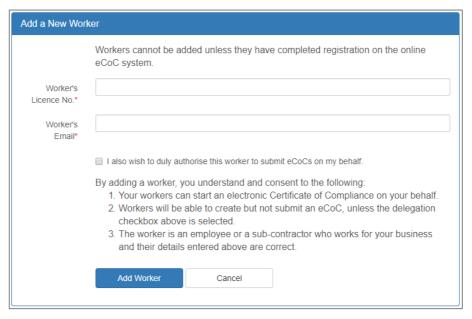
Maintain a list of your workers, which will allow them to create eCoCs recognising that you are the contractor



3.2.1 Add a Worker

Workers must first register for eCoC before you can add them to your list of Workers

1. Click Add Worker above the List of workers



2. A new section will open, enter the worker's licence number and the email address they used to register on the eCoC system

The usage of the tickbox to authorise the worker to sign on your behalf is covered in the following section 3.3.2 Contractor's Duly Authorised Agent

3.3 Supervisors, Admin Staff and the Contractor's Duly Authorised Agents

eCoC allows you to create accounts for your supervisors, admin staff and to delegate individual workers as authorised to sign on your behalf.

3.3.1 My Authorised Persons (Supervisors and Admin Staff)

Create Authorised Persons accounts to provide others with access to your certificates.





Add Full Name Role Username Email Jane Supervisor Supervisor Jane 1971 Jane@email.com Admin bob1976 bob@email.com

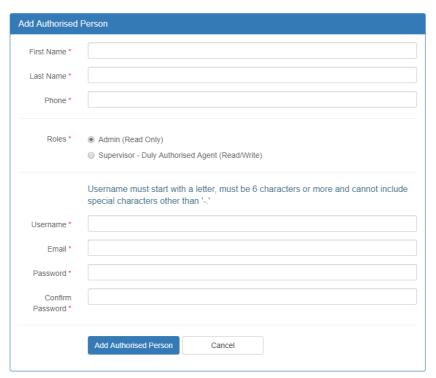
You can create and manage accounts for your staff who are not registered for eCoC in the **My Authorised Persons** section.

There are 2 types of Authorised Person account in eCoC:

- Admin
 - o provided with read-only access to the eCoCs and other Contractor information
- Supervisor
 - May perform most functions of the contractor with the exception of creating additional authorised person accounts, and editing the details of the contractor's profile.
 Recognised as the Contractor's duly authorised agent.

To create a new Authorised Person account:

1. Click Add above the list of Authorised Persons



2. A new section will open, complete the contact details, set a username (which they will use to login) and set a password then click *Add Authorised Person*.

The Authorised Person's username is used to login and can't be easily changed. They can set an alternative password by using the *Forgot Password* option available on the sign in screen.





Email addresses for all types of accounts in eCoC must be unique, so if the person in question has another account (such as one for their own licence) they must supply an alternative email address.

A contractor may delete an Authorised Person account at any time.

3.3.2 Contractor's Duly Authorised Agent

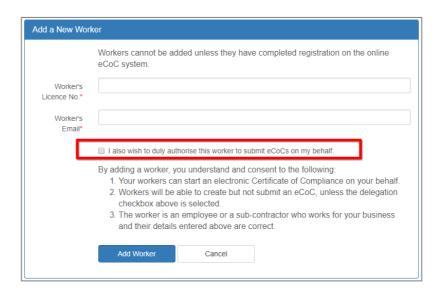
A contractor may nominate a person to sign on their behalf, where that person has or had a supervisory role over the worker named on the eCoC.

Note that workers are not permitted to sign a certificate both as the worker, and as the contractor's duly authorised agent, as they cannot be their own supervisor.

Supervisors

Supervisor accounts are created through the My Authorised Persons screen, and will receive a user interface identical to that available to the Contractor. To sign an eCoC they would simply follow the process detailed in **3.1 Signing an eCoC Certified by one of your Workers**.

Authorised Workers



When adding a worker, a tickbox is available to nominate the worker as the Contractor's Duly Authorised Agent. This is designed for occasional duties and so has a simplified interface when compared with the Supervisor account.



Workers will notice an **Authorised Agent** button above their dashboard within My eCoCs. Typing an eCoC number into this area will open that eCoC, allowing the worker to sign off on behalf of their employing contractor.

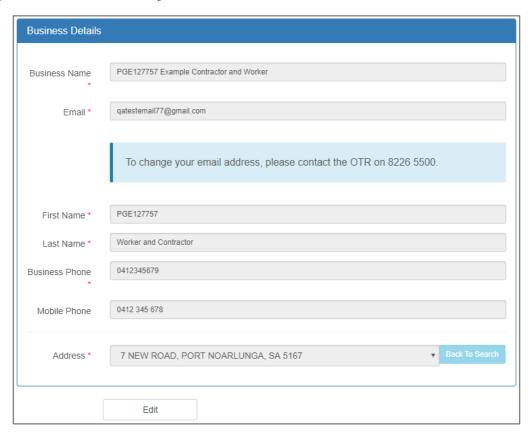
Note that workers are not permitted to sign a certificate both as the worker, and as the contractor's duly authorised agent, as they cannot be their own supervisor.





4. MY PROFILE

Edit your contact details in your Profile.



To update your details, click the *Edit* button, verify your address in the same way described in section **2**. **Creating an Electrical eCoC**.

5. MY LICENCES

The My Licences screen provides a summary of the basic conditions of your licence or licences. Please refer to the **Using Multiple Licences to Complete eCoCs** guide for information on adding and using additional licences.



The eCoC system will identify whether you can contract or work within the electrical, gas fitting and or plumbing industries.

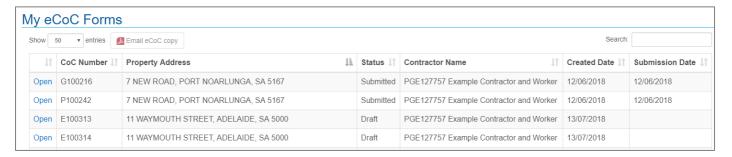
Note that restrictions to licences are not automatically applied, so ensure you are only performing and certifying work within the terms of your licence.





6. MY ECOCS

Find, open and send your eCoCs through the My eCoCs screen.



6.1 Columns on the My eCoCs Dashboard

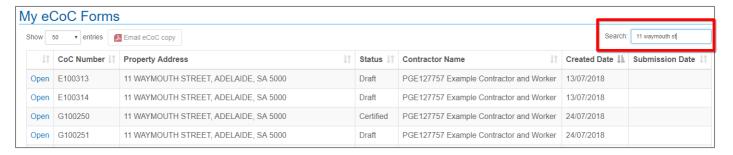
- 1. **CoC Number** reference number for your certificate, these will begin with either P, G, or E for plumbing, gas fitting and electrical certificates of compliance.
- 2. **Property Address** the address of the site of the work
- 3. Status current progress of the eCoC, which will be:
 - 1. Draft (not yet signed, and the details of the work can be added and edited)
 - 2. Certified (signed by the worker, and awaiting contractor signoff)
 - 3. Submitted (signed by the worker and the contractor, now complete and can be sent to customers)
- Contractor/Worker Name Contractor or Worker allocated to that eCoC. Those with Contractor conditions will see the Worker Name, and those without will see the Contractor Name.
- Created Date date on which the eCoC was first created
- 6. Submission Date date on which the eCoC was submitted (signed by the Contractor and distributed)

6.2 Opening and Sending eCoCs

To open an eCoC for editing, or to check details previously entered; click the *Open* link to the left of the CoC Number.

To send a copy of a submitted eCoC, click or tap once on a row then click or tap on the *Email eCoC Copy* button. You'll then be asked for an email address and the eCoC system will email a PDF copy of the certificate to that address. Note that only Submitted eCoCs can be sent this way.

6.3 Searching for eCoCs



To search for eCoCs by the information contained in any of the columns, type into the search box, results will be displayed below.



