Consultant transferring Equipment Registration Payment to Responsible Supplier

The below steps outline the process to transfer an equipment registration payment, and some tips to explain and improve understanding of the process.

1) consultant has completed all steps of creating an Equipment Registration; made declaration; and selected length of registration.
    a) when choosing length of registration currently only 1, 2 or 5 years can be selected
    b) if level 3 equipment, the term of registration cannot exceed the expiry date of the certificate (so if certificate expires in 3 years and 9 months and 5-year registration term is selected the 5-year payment will be required but the term of registration will only be 3 years and 9 months)
    c) it is recommended you ensure the certificate is renewed to the latest standard and any amendments published (even if still in the transition phase) before you do the equipment registration if you want a 5-year registration. If you cannot get the certificate renewed and still require registration, then choose only 1- or 2-year registration term and have the certificate renewed when it is closer to that equipment registration expiry date and then renew the equipment registration for a further period

2) consultant adds the Equipment Registration to their payment cart
    a) can add multiple equipment registrations for that Responsible Supplier to that payment cart before transferring

3) consultant continues until 'select payment method' step

4) at that stage consultant can use ‘Actions’ menu to ‘payment transfer’ to another person - to a person linked to the Responsible Supplier

5) consultant puts in email address of the person in Responsible Supplier business (i.e. who is linked to the Responsible Supplier), to transfer to (and adds a comment to record details) – note the comment will appear in the Audit or history when viewed

6) the consultant checks with person in the Responsible Supplier they are ready to accept the transfer and make the payment
    a. **this step occurs outside of EESS and is part of consultant and Responsible Supplier process/agreements** as set up outside of the EESS platform

    b. **only the person who the transfer was sent to will be able to action the payment in the Responsible Supplier account (a security measure)** so it is important the consultant confirms with that person they are ready to accept transfer for payment

7) consultant submits transfer request (no email or notification occurs in system to the Responsible Supplier - but the Responsible Supplier is aware it is coming as they have been in discussion with the consultant about the transfer)

8) consultant payment cart (for that Responsible Supplier) can no longer be actioned by the consultant (the ‘go’ button is shaded out) with status of ‘checkout in progress’

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9) consultant payment cart view (payment cart of consultant for that Responsible Supplier) as selected from left side menu shows ‘checkout in progress’ and if clicked on the ‘go’ button remains shaded out (can no longer be actioned by the consultant)

10) the ‘payment cart’ is not transferred to the Responsible Supplier, just the request to action payment is sent

11) the person in the Responsible Supplier account (the person whose email was selected and who was contacted by consultant and told payment would be transferred to) logs into their Responsible Supplier account

12) on that Responsible Supplier person's **‘Home' page**’ (click on ‘house’ icon on left side menu) there will be an item to action in the **‘My requests''/ ‘Assignment step’** section - it will have the payment cart case number

13) the person in the Responsible Supplier account clicks on that assignment case, and the payment cart opens
    a. it opens the consultant payment cart for person to click on ‘go’
    b. however, the payment cart case number will not appear in the Responsible Supplier payment cart list
    c. the Responsible Supplier can only gain access to the payment process by clicking on the case in the **‘My requests''/ ‘Assignment step’** section of their home page

14) the Responsible Supplier person clicks on ‘go’ button and completes the payment process (or can also transfer it to another person in the Responsible Supplier to make payment – if they do that then that person it was transferred to will see it come up in their home page 'My requests - Assignment step' section)

15) once payment is completed the Equipment will be registered

Notes:

a. the consultant has a separate payment cart for each responsible supplier they process equipment registrations for.
b. the consultant cannot add other payments to that particular consultant Responsible Supplier payment cart while payment cart is ‘checkout in progress’ - the consultant must wait until payment is finalised and then that consultant Responsible Supplier payment cart will be cleared, and then consultant can add more payments.
c. if consultant has other equipment registrations to do for that Responsible Supplier, they can proceed with them up to the stage of ‘add to payment cart’ and keep them in that stage unit the Responsible Supplier has completed the payment, and when the payment cart is cleared the consultant can then add them (and pay or transfer to Responsible Supplier to pay).
d. the consultant can add payments to payment carts of other Responsible Supplier companies they work for without being affected by the status of any other payment carts (consultant has sperate payment carts for each Responsible Supplier they do work for).