

TMF Declarations

Quick Reference Guide

Managing your
assigned tasks

Navigating the Contents of Your Assigned Tasks

Each Task on your Dashboard corresponds to a specific Declaration Form. Each Declaration Form contains a number of Sections that need to be completed before the form can be submitted.

Clicking on one of your Assigned Tasks will take you to the Section Menu for that Task.

1. At the top of the screen you will see which Declaration Form you are currently in, as well as your Agency name and details for this year's declaration campaign. **If any of these details are incorrect, please contact your internal TMF Declarations Coordinator, your icare Client Engagement Manager, or email us at declarations@icare.nsw.gov.au.**
2. In the middle of the screen you will see a list of Sections within that Declaration Form that have been assigned to you for completion. The status of each Section is displayed underneath the title of that Section. Coordinators and Approvers will see all Sections of each Declaration Form that is assigned to them. Delegates will only see the Sections assigned to them by their Coordinator.
3. Just above the list of Sections you will see a "Download Instructions" button. Click this to download a guide on where to find additional information on how to complete each declaration form.
4. On the bottom left of the Section Menu you will see the "Cancel" and "Save & Exit" buttons. While both buttons will take you back to your Dashboard, the Cancel button will return you to the Dashboard without saving. **To ensure your changes are not lost, please always use the Save & Exit button.**

The screenshot shows the 'PROPERTY DECLARATION FORM' interface for 'Test Campaign ML - Due 28-Sep-2019'. At the top, the 'Task title' is indicated. Below the instructions, a 'DOWNLOAD INSTRUCTIONS' button is highlighted with the note 'Click to download guidance document'. The main area contains a 'List of your assigned form sections' table:

Asset Register Section Incomplete	DELEGATE >
Watercraft Section Incomplete	DELEGATE >
Aviation Section Incomplete	DELEGATE >
Fine Arts Section Incomplete	DELEGATE >
Property Summary - Asset Values Section Incomplete	DELEGATE >
Excess / Franchise Section Incomplete	DELEGATE >

The 'Section status' for the Watercraft Section is highlighted. At the bottom left, 'CANCEL' and 'SAVE & EXIT' buttons are shown, with a note 'Click to go back to your Dashboard' pointing to the 'SAVE & EXIT' button.

Delegating Declaration Form Sections

As a Coordinator, you can delegate the completion of individual Declaration Form Section to anyone within your organisation.

Before doing so, you may wish to acquaint yourself with the contents of each section to help you determine the most appropriate delegate. Feel free to explore each Section to understand the questions within, or use the Download Instructions button to access the detailed guides for each declaration form.

How to delegate a Section to another user

1. Click the "Delegate" button on the relevant Section row to bring up a list of current users within your organisation.

The screenshot shows the icare Insurance for NSW interface for the PROPERTY DECLARATION FORM. At the top, there is a dropdown menu for 'Test Campaign ML - Due 28-Sep-2019'. Below this, there are sections for 'INSTRUCTIONS' and 'DOWNLOAD INSTRUCTIONS'. The main area displays a list of sections, each with a 'DELEGATE' button and a right-pointing chevron. The sections listed are: Asset Register Section (Incomplete), Watercraft Section (Incomplete), Aviation Section (Incomplete), Fine Arts Section (Incomplete), Property Summary - Asset Values Section (Incomplete), and Excess / Franchise Section (Incomplete). A red box highlights the 'DELEGATE' button for the 'Asset Register Section', with a red arrow pointing to it and a callout box containing the number '1' and the text 'Click on the Delegate button to delegate a section'. At the bottom of the interface, there are buttons for 'CANCEL' and 'SAVE & EXIT'.

2. Click "Add User", type in the email of your nominated delegate and click "Create". Once you create a new user, a system-generated email will be automatically sent to that user with their login details and URL link to the login page.
3. Select your newly created delegate from the user list and click "Delegate User". This will automatically send an email to your nominated Delegate advising them that a new Task has been assigned to them, including a link to that Task.

- Once you have delegated a Section, the status of that section will be updated to reflect who it has been assigned to.

The screenshot shows a dialog box titled "Delegate User To Section". At the top is a search bar with a close button (X). Below the search bar is a list of email addresses: abc@icare.nsw.gov.au, alex.donovan1@icare.nsw.gov.au, alex.donovan@icare.nsw.gov.au, antonio.benzano1@icare.nsw.gov.au, aparna.mahajan1@icare.nsw.gov.au, and aparna.mahajan@icare.nsw.gov.au. The first email address is highlighted in grey and has a checkmark to its right. At the bottom of the dialog are three buttons: "ADD USER", "CANCEL", and "DELEGATE USER".

Callout 2: "Add new users to the list as required" with an arrow pointing to the "ADD USER" button.

Callout 3: "Click on the user once they have been added" with an arrow pointing to the checkmark next to the first email address.

Callout 4: "Click Delegate User to confirm your selection" with an arrow pointing to the "DELEGATE USER" button.

- Please note that the notification emails do not specify who assigned the Section. It is recommended that you contact your Delegates separately to inform them of what sections have been assigned to them and ensure they have received their notification emails.
- Because the emails are system generated, Delegates may need to check their SPAM folders. As a Coordinator, you may want to confirm with your IT department whether the email address and URL needs to be whitelisted before you start the delegation process.

Revoking Delegated Sections

You can also revoke a delegated Section prior to the delegate completing it.

1. To revoke a Section, click on the "Revoke" button on the relevant Section row and confirm your selection.
2. Please note if you revoke a partially completed Section, any changes your delegate may have made will be lost.
3. If you revoke a Section, the person to whom this section was originally delegated will receive a system-generated email advising them that this Task has been revoked.

The screenshot shows the 'PROPERTY DECLARATION FORM' interface for 'icare Insurance for NSW'. At the top, it displays 'UAT1 LORD HOWE ISLAND BOARD - TEST CAMPAIGN ML - PROPERTY DECLARATION FORM'. A dropdown menu shows 'Test Campaign ML - Due 28-Sep-2019'. Below this, there are 'INSTRUCTIONS' and a 'DOWNLOAD INSTRUCTIONS' link. The main content is a table of sections:

Section Name	Status	Action
Asset Register Section	Assigned to Ian Koo ian.koo@icare.nsw.gov.au ← Section status	Revoke your delegation at any time → REVOKE >
Watercraft Section	Incomplete	DELEGATE >
Aviation Section	Incomplete	DELEGATE >
Fine Arts Section	Incomplete	DELEGATE >
Property Summary - Asset Values Section	Incomplete	DELEGATE >
Excess / Franchise Section	Incomplete	DELEGATE >

At the bottom of the form, there are 'CANCEL' and 'SAVE & EXIT' buttons.