# icare Insurance for NSW

# How To Delegate & Revoke a Declaration Form



## icare Insurance for NSW

## How To Delegate & Revoke a Declaration Form

#### Login via the Insurance for NSW Portal: https://my.icare.nsw.gov.au/login/

#### Tasks

- Each task on your dashboard corresponds to a specific Declaration form.
- Clicking on one of your tasks will take you to the Section Menu for that Declaration Form.
- Each form contains a number of sections that need to be completed before the form can be submitted.

#### Before you Delegate your Forms

- 1. Inform your IT department that they will need to "whitelist" Ventiv so your Delegates can easily access and complete their forms.
- 2. Let your Delegates know they will receive an email from <u>declarations@icare.nsw.gov.au</u> and to check their SPAM/Junk folders.
- 3. Acquaint yourself with the contents of each section to determine the most appropriate Delegate.
- 4. To ensure data integrity, there should only be one Delegate per section of a form.

#### How to Delegate a Section of Your Declaration Form

- 1. Different sections can be delegated to different people, or all sections can be delegated and completed by the same person.
- 2. Click the **Delegate** button on the relevant section. This will bring up a list of current/existing users within your organisation to choose from.

insurance for NSW	PROPERTY DECLARATION FORM UATI LORD HOWE ISLAND BOARD - TEST CAMPAIGN ML - PROPERTY DECLARATION FORM
Test Campaign ML - Due 28-Sep-2019 V	
STRUCTIONS	
t Instruction Text - Create Campaign	Click on the Delegate button to delegate a section
Asset Register Section	DELEGATE
Watercraft Section	DELEGATE
Aviation Section	DELEGATE
Fine Arts Section Incomplete	DELEGATE
Property Summary - Asset Values Section Incomplete	DELEGATE
Excess / Franchise Section	DELEGATE

- 3. If you are unable to find a user:
  - i. Click on Add User

Delegate User To Section		
Search		×
abbas.alibhai@health.nsw.gov.au		<b>A</b>
abc@icare.nsw.gov.au		
abobbermein@zoo.nsw.gov.au		
accounts@wptrust.com.au		
ada.leung@finance.nsw.gov.au		
adam.macbeth@health.nsw.gov.au		-
ADD USER	CANCEL	DELEGATE USER



- ii. Type in the email of your nominated Delegate
- iii. Click on **Create** [A system-generated email will be automatically sent to that user with their login details and URL link to the login page].

Create New User		
Enter email john.doe@icare.nsw.gov.au		
Please provide a valid email and domain		
	CANCEL	CREAT

4. Search and select your Delegate from the user list and click **Delegate User**.

Delegate User To Section	
john.do	×
john.doe@icare.nsw.gov.au	~
ADD USER	CANCEL DELEGATE USER

5. When you delegate a section of a form, you must wait to see the screen prompt that says **Delegate Successful** before taking another action.



6. A system-generated notification email will be sent to the Delegate to advise that they have been assigned a declaration form. Delegates may need to check their SPAM/Junk folders.

### Managing Your Delegate

- 1. You can view (only) the delegated section at any time, including the Delegate's responses prior to submission.
- 2. A Coordinator has the ability to revoke a section at any time.
- 3. To revoke a Delegate from a Section, select the Revoke button on the relevant Section

PROPERTY DECLARATION FORM UATI LORD HOWE ISLAND BOARD - TEST CAMPAIGN ML - PROPERTY DECLARATION FORM			
·			
ection status	Revoke your delegation at any time	REVOKE	>
		DELEGATE	>
		DELECATE	,
	ection status	ection status	ection status  Revoke your delegation at any time  Revoke DeLeoATE



#### 4. There are 2 revoking options:



- i. **Revoke and Drop Responses** this option will **delete** any data that has been entered and restore the section back to its original state, <u>all</u> changes will be lost.
- ii. Revoke and Save Responses allows the system to retain any data that has been entered.

<u>Note:</u> To ensure data integrity, we recommend that there should only be **one Delegate per section of a form**. However, option 4. can be useful when a Delegate is away/unwell or no longer available and unable to complete the task, or where a section ultimately requires input from 2 different Delegates.