

FIRSTRATE5 MANAGE DELEGATIONS VIDEO TRANSCRIPT

- FirstRate5, Victoria's leading residential thermal performance assessment software, now has a delegation function, which allows one FirstRate5 account holder to pay for a Certificate for a project which has been assessed by another FirstRate5 account holder.
- Let's take the example of John, a NatHERS Accredited Assessor. John occasionally does sub-contracting work for his friend Mary who owns a volume assessor company.
- When John does work for Mary's company however, he models the assessments using his accreditation number in the project files, while Mary covers the client liaison and financial matters.
- Mary can upload John's file and produce a certificate using her own credits. To do this John delegates permission to Mary to use his accreditation number by following FirstRate5's simple delegation process.
- Both John and Mary have FirstRate5 accounts. After logging in, John selects 'Manage Delegations'.
- He enters Mary's username and then selects 'Submit'. The system sends John's offer to Mary's account and it appears in her Notifications.
- It is also listed under the 'Assigned Delegations' list as 'Pending' in John's account.
- Mary logs in to her account, sees the notification and accepts it. Its status in John's account now changes to 'Accepted'.
- After John completes his assessment and is satisfied with the star rating on the preview certificate he emails this and the project file to Mary.
- Mary then uploads John's project file to her account. The system allows this as Mary has been delegated permission to upload files containing John's accreditation number. She then purchases credits and produces a certificate.
- The Certificate displays John's accreditation number and other details, but the Organization field contains the name of Mary's company, and Mary has the sole authority to withdraw the certificate.

- If John was a member of more than one Assessor Accreditation Organisation (for example BDAV and ABSA), permission to use both accreditation numbers would automatically be delegated to Mary under the one operation.
- Some months later John moves overseas so he revokes Mary's delegated permission. However, the project files and certificates already produced by Mary using this permission remain in her account.
- In summary:
 - You can now delegate permission to a third party to pay for a certificate.
 - The certificate will be stored in the online account of the person making the payment and they will have the authority to withdraw it.
 - The person carrying out the assessment is considered its author and may still be audited by their AAO.
- For more information about the new FirstRate5, visit fr5.com.au.com.au