



Australian Government



Consumer  
Data Right

# Participant Portal User Guide

January 2022

Version 4.8

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## Glossary

Shortened form	Extended form
<b>Accredited person</b>	An accredited person means a person who has satisfied the Data Recipient Accreditor that it meets the criteria for accreditation specified in the Consumer Data Right Rules and has been accredited by the Data Recipient Accreditor
<b>Accreditor</b>	Data Recipient Accreditor - currently the Australian Competition and Consumer Commission
<b>ACCC</b>	Australian Competition and Consumer Commission
<b>ADI</b>	Authorised deposit-taking institution
<b>ADR</b>	Accredited data recipient
<b>AFCA</b>	Australian Financial Complaints Authority
<b>Affiliate</b>	A Sponsored ADR who has entered into a sponsorship arrangement with an Unrestricted ADR. The Affiliate can only obtain a consumer's CDR data from a sponsor with consumers' consent. An Affiliate can have many Sponsors.
<b>Applicant</b>	A person who submits an application for accreditation as an accredited person
<b>Associated person</b>	A person involved/or could be involved, or who would be involved if accredited, in decision making by the applicant or accredited person or who has the ability to significantly impact another person's management of CDR data. For a body corporate - an associate of another person or associated entity has the meaning given to it under the <i>Corporations Act 2001</i>

Shortened form	Extended form
<b>CDR</b>	Consumer Data Right
<b>CDR Participant Portal</b>	The online mechanism to create a CDR portal account, complete and submit an accreditation application, register as a data holder, manage and update a participant's information
<b>CDR Register</b>	Register of accredited persons
<b>CDR Rules</b>	<i>Competition and Consumer (Consumer Data Right) Rules 2020</i>
<b>Data holder</b>	A holder of CDR data
<b>Participant</b>	A data holder or an accredited data recipient participating in the CDR regime
<b>Rapid ID</b>	Rapid ID is the CDR's third-party identity verification provider
<b>Sponsor</b>	An Unrestricted ADR who has entered into a sponsorship arrangement with a sponsored ADR. The Sponsor must collect data for the Affiliate. A Sponsor can have many affiliates.
<b>Sponsored Accredited Data Recipient (Sponsored ADR)</b>	A Data Recipient who is able to obtain consent from consumers to receive their data, however they cannot collect data directly from a data holder and must do this through an unrestricted accredited data recipient (Unrestricted ADR) with consumers' consent when a sponsorship arrangement is in place.
<b>Sponsorship Arrangement</b>	A written contract between two data recipients: one accredited at the unrestricted level and the other accredited at the sponsored level.
<b>Unrestricted Accredited Data Recipient (Unrestricted ADR)</b>	A Data Recipient who is able to obtain consent from consumers and collect data from data holders without any restrictions for all designated sectors.

# 1. About the CDR Participant Portal

## 1.1. Overview

The Consumer Data Right (CDR) aims to give consumers greater access to and control over their data. It will improve consumers' ability to compare and switch between products and services, and will encourage competition between service providers, leading not only to better prices for customers but also more innovative products and services. Banking is the first sector to be brought into the CDR.

The CDR Participant Portal (Participant Portal) is the online mechanism through which a data holder can complete the data holder registration process and a legal entity/person can complete and submit an application to become an accredited data recipient. The Participant Portal is also the place for CDR participants - data holders and accredited data recipients - to update and manage their information and view the CDR Register of Accredited Persons (CDR Register).

This guide aims to provide information and guidance to assist CDR participants on the key features of the Participant Portal.

For more information, visit the [CDR website](#).

### ! Note

Before you make the initial request to access the Participant Portal for your organisation, it is highly recommended you read this guide to ensure you have all the relevant details at hand.

## 1.2. Services available in the Participant Portal

The Participant Portal can be used by an organisation to:

- register as a data holder
- submit an application for accreditation
- invite and manage users
- manage an organisation's details
- manage brands and software products.

## 2. Creating a Participant Portal account

### 2.1. Who can create a Participant Portal account?

Only potential CDR participants need a Participant Portal account. An initial primary business contact is responsible for creating an account for their legal entity through the Participant Portal. See the Appendix of this guide for more information about the primary business contact.

#### ! Note

The initial primary business contact for a legal entity must be a person who is listed on the organisation's Australian Securities and Investments Commission (ASIC) business record, or the equivalent foreign business record if the organisation is a foreign entity. For example, a director, company secretary, authorised contact etc.

### 2.2. Information needed to create a Participant Portal account

A primary business contact will need the following information to create an account.

#### Organisation details

- your organisation's ABN or ACN, providing you the ability to search via the ABN/ACN search box in the application form with the companies ABN/ACN, returning the legal entity name
- whether your organisation is an authorised deposit-taking institution (ADI) as per the meaning given by the *Banking Act 1959* (Cth)
- whether your organisation is a foreign entity
- the registered address for service and registered business address for your organisation (if the organisation is a foreign entity, you will be required to have a local agent and provide their addresses for service). This must be a physical address associated with your legal entity, and not a PO box
- the email address for service for your organisation.

#### Initial primary business contact details

- the initial primary business contact's email address
- the initial primary business contact's mobile phone number.

#### ! Note

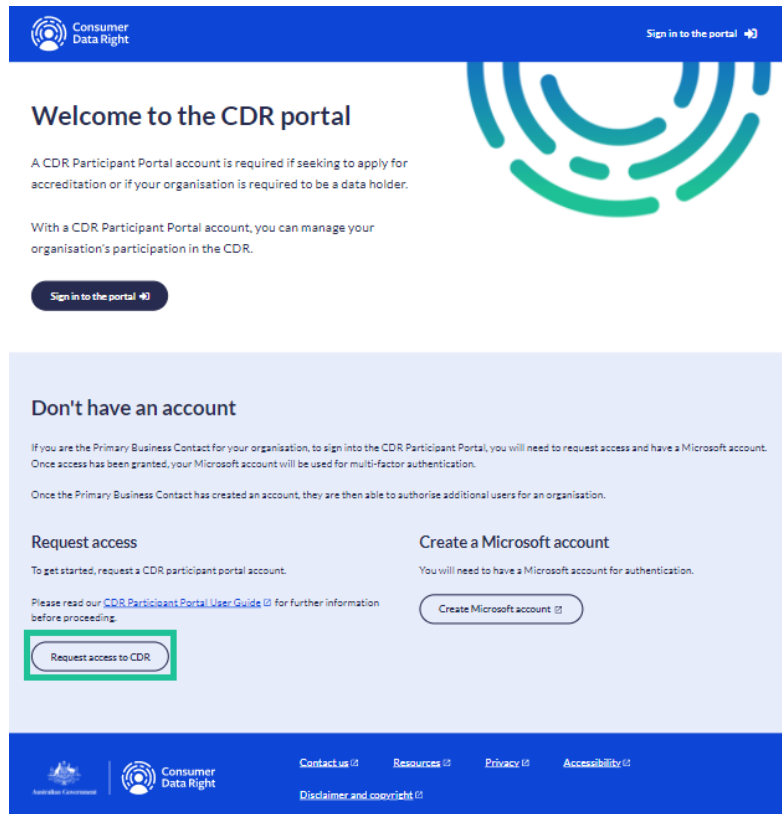
If intending to apply for accreditation, the answer you select in response to the question about whether your organisation is an Australian ADI will determine which accreditation application will be applicable and made available to you in the Participant Portal.

### 2.3. Complete the request access to CDR form

1. To request access to the Participant Portal as an initial primary business contact, open an internet browser and navigate to <https://portal.cdr.gov.au>. The website

works best on Microsoft Edge, Internet Explorer version 11, or Chrome on Windows and Safari, or Firefox on Mac OS.

2. Select **Request access to CDR**.



Consumer Data Right

Sign in to the portal

## Welcome to the CDR portal

A CDR Participant Portal account is required if seeking to apply for accreditation or if your organisation is required to be a data holder.

With a CDR Participant Portal account, you can manage your organisation's participation in the CDR.

Sign in to the portal

### Don't have an account

If you are the Primary Business Contact for your organisation, to sign into the CDR Participant Portal, you will need to request access and have a Microsoft account. Once access has been granted, your Microsoft account will be used for multi-factor authentication.

Once the Primary Business Contact has created an account, they are then able to authorise additional users for an organisation.

#### Request access

To get started, request a CDR participant portal account.

Please read our [CDR Participant Portal User Guide](#) for further information before proceeding.

Request access to CDR

#### Create a Microsoft account


You will need to have a Microsoft account for authentication.

Create Microsoft account

Contact us Resources Privacy Accessibility Disclaimer and copyright

3. Complete all mandatory questions on the form (all questions are mandatory unless marked optional).
4. Submit the request to create an account. On submitting your request, the system will validate the information you have provided. If you have not answered all mandatory questions or have provided an invalid answer, you will be notified that the form could not be submitted including the reason/s why. You then have the option to update the information and resubmit your request.




[Sign in to the portal](#)

## Create an account

All questions are mandatory unless marked optional

### Organisation details

Please provide the following details for your organisation. These are the organisation details that will be entered on the CDR register when required.

Start ☒

Foreign Entity ☒

Search ABN ☒

Confirm ABN ☒

Personal ☒

Address ☒

Submit

### Confirm

Electronic Address for Service

example@email.com

PBC Mobile phone number

+6412345678



☒ I consent to my personal information (as defined in the Privacy Act 1988) being collected, used, and disclosed, for the purposes specified in the Terms of Use Agreement. \*

☒ I have read and agree to the terms presented in the Terms of Use agreement. \*


[Terms of Use agreement](#)

Previous


Submit



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[Privacy](#)
[Accessibility](#)
[Disclaimer and copyright](#)

- Once the form has been validated, you will be shown a page confirming your request has been submitted and a unique access request number.


[Sign in to the portal](#)

## Success page



**Success**

Your request for access to the Consumer Data Right (CDR) Participant Portal has been submitted for assessment. We may follow up to discuss details of your request or to request additional documents.

Please monitor the mobile phone number you entered for the SMS text message invitation to complete the identity verification process via our third party identity provider, RapidID.

**Your access request number is AR003637**

You will also receive a confirmation email with your unique access request number and advice to monitor your mobile to complete the identity verification process.

### Example email: access request

Your access request has been submitted and your reference number is XXXXXX.

The Consumer Data Right Team will review your request and may contact you for more information.

Please monitor the mobile phone number you provided in the online form for an invitation to complete the identity verification process via our third-party identity provider, Rapid

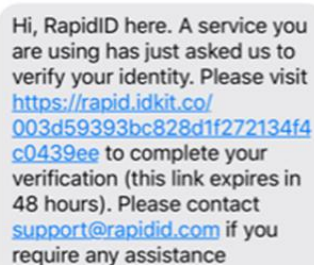
ID. Note, the link to verify your identity will expire in 48 hours.

You will receive a notification via email of the outcome of your request to access the Consumer Data Right Participant Portal. The email will include instructions on how to activate your account to finalise the account creation process.

## 2.4. Verify your identity

Once your request to create an account has been reviewed and deemed valid by the Australian Competition and Consumer Commission (ACCC) CDR Team, within 3 business days you will receive an SMS on the mobile phone number provided in the form. This will allow you to verify your identity.

The SMS will include a link to the Rapid ID website.



Hi, RapidID here. A service you are using has just asked us to verify your identity. Please visit <https://rapid.idkit.co/003d59393bc828d1f272134f4c0439ee> to complete your verification (this link expires in 48 hours). Please contact [support@rapidid.com](mailto:support@rapidid.com) if you require any assistance

### ! Note

The SMS you receive to verify your identity will be from Rapid ID. Rapid ID is a mobile only application and is unable to be used via a desktop. This link will expire after 48 hours of being sent. If the link expires before you complete this step and you wish to continue to create an account, please contact us via the CDR Support Portal (Support Portal) at [Jira Customer Portal](#).

During the Rapid ID identity verification process, follow the on-screen instructions provided, which includes taking a photo of your valid identity document. For Australian and New Zealand applicants, a current driver's licence or passport are acceptable identity documents. For applicants from other countries, a current passport is a valid identity document. The Rapid ID identity verification process will also require you to take a photo of yourself and confirm your details.

## 2.5. Activate your Participant Portal account

Once your identity has been verified and your request to create an account has been approved by the CDR Team, within 3 business days you will receive an activation email with instructions on how to activate your account in order to finalise creating it.

These instructions include:

- creating a Microsoft account using the primary business contact's email address
- associating your Microsoft account with the Participant Portal
- setting up your Mobile Authenticator app
- activating your Participant Portal account

- logging into the Participant Portal.

Follow the instructions within the activation email to activate your account.

If your organisation does not manage your emails using Office 365, you need to [create a Microsoft account](#) using the same email address provided in the request to create an account. Refer to step 1 in your activation email for more information.

Once your account activation process is complete, you will be able to login to the Participant Portal. Note you must use the same email address used to create the account. If you have problems during this step, please contact us via the Jira Support Portal at [Jira Customer Portal](#).

**! Note**

You have 7 calendar days to activate your account before your unique security token expires. If your token expires before you complete this step, please contact us via the Jira Support Portal at [Jira Customer Portal](#).

**Example email: Participant Portal account confirmation**

Your Consumer Data Right Participant Portal account has been created.

To activate this account, you will need to complete the steps below to create and link to a Microsoft account.

**Step 1 - Creating a Microsoft account**

If you do not have an existing Microsoft account associated with the e-mail address used to register with the Consumer Data Right Participant Portal, you will need to create one before you can proceed. You can create a Microsoft account by clicking here:

<<https://account.microsoft.com/account>> and following the on screen instructions. You do not need to complete this step if you already have a Microsoft account associated with your e-mail used to register with the Consumer Data Right Participant Portal.

**Step 2 - Associating your account with CDR**

Please click here: <<https://portal.cdr.gov.au>> and sign into the Consumer Data Right Participant Portal. You will be directed to sign in and link your Microsoft account with Consumer Data Right.

**Step 3 - Setting up your Mobile Authenticator**

Follow the on-screen instructions to set up the Microsoft Authenticator app on your mobile device.

**Step 4 - Activating your Consumer Data Right Participant Portal account**

Once Step 2 and Step 3 have been completed, you will be redirected back to the Consumer Data Right Participant Portal and asked to provide the token below to activate your account.

Security Token:

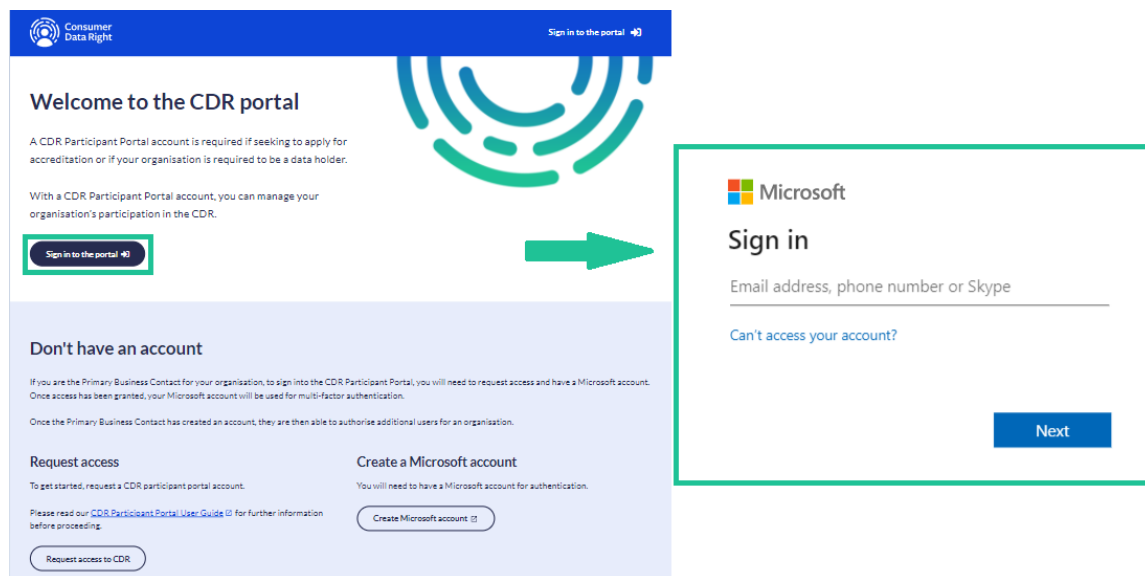
uK2gwdew7vDvrhVSNfo1p7fJj1CDfvnyfrmQQw5jUlzc2QPMZLi4Yqrfuuyibz-  
CfdhdmsrcT2EnPNZtSGD9pXrnw4-x89Z-i3fenoZ8c4R8n-VFNO-QkR3-  
bgg6rnsLPzFFAaZf6XAKo1a5c3O43frV6WWQ40J-rdDdDjxkuec-

## Step 5 - Sign in

You can now sign into your Consumer Data Right Participant Portal account.

### 3. Logging into the Participant Portal

1. Access the Participant Portal by opening an internet browser and navigating to <https://portal.cdr.gov.au/>. The website works best on Microsoft Edge, Internet Explorer version 11, or Chrome on Windows and Safari, or Firefox on Mac OS.



2. Login to the Participant Portal using your Microsoft account login details.
3. Every time you login, you are required to authenticate using the Microsoft Authenticator app. If you do not have this installed or setup, refer to **step 3** in your activation email.
4. The first time you login to the Participant Portal, you will need to enter the security token from the 'Participant Portal account confirmation' email you received. If your token expires before you complete this step, please contact us via the Jira Support Portal at [Jira Customer Portal](#).



## 4. Managing users in the Participant Portal

The Participant Portal supports multiple user roles with different permission profiles so that participants can effectively manage their organisation's information. For more information on supported user roles, please refer to the [User roles and permissions](#) in this guide.

### 4.1. Inviting participants

A primary business contact can invite additional users within the organisation to have access the Participant Portal, including other primary business contacts. There may be multiple users for most roles.

1. Login to the Participant Portal at <https://portal.cdr.gov.au> and select **Organisation** from the top navigation menu.
2. Select **User list** from the left side navigation menu. You will be shown a table listing all current users (first name, last name, email address and role of the person) within your organisation.
3. Select the **Invite user** button on the top right of the table.
4. The **New user** screen is displayed. From here you can invite a new user and assign an access type (role) to their account.
5. Choose the access type you want to assign to the new user. A user's role can be modified at any time.
6. Complete required fields in the form and select **Invite**.

The image displays two screenshots from the Participant Portal. The left screenshot shows the 'User list' page for 'Organisation A'. It features a table with columns for First name, Last name, Email address, Role, and Actions. A green box highlights the 'Invite user' button in the top right corner of the table. The right screenshot shows the 'Invite a new user' form. It includes sections for 'Access type' (with radio buttons for Primary Business Contact, Authorized Business Contact, Primary IT Contact, Authorized IT Contact, and Legal Authority Contact) and 'Personal details' (with fields for First name, Middle name (optional), Last name, and Date born). A green arrow points to the 'Personal details' section. Below these are 'Contact details' fields for Email address, Primary contact number, and Secondary phone number (optional). A green arrow points to the 'Invite' button at the bottom right of the form.

First name	Last name	Email address	Role	Actions
Andy	Wu	andywu@company.com	Primary Business Contact	<a href="#">Edit user</a> <a href="#">Remove user</a>
Henry	Henry	henry.henry@cdr.gov.au	Primary Business Contact	<a href="#">Edit user</a> <a href="#">Remove user</a>
Lucas	Lucas	lucas.lucas@company.com	Authorized CTS Tester	<a href="#">Edit user</a> <a href="#">Remove user</a>
Michael	Michael	michael.michael@company.com	Primary Business Contact	<a href="#">Edit user</a> <a href="#">Remove user</a>
John	John	john.john@company.com	Primary Business Contact	<a href="#">Edit user</a> <a href="#">Remove user</a>
John	John	john.john@company.com	Primary Business Contact	<a href="#">Edit user</a> <a href="#">Remove user</a>

Your invited user will receive an email requesting them to activate their Participant Portal account. New users will need a Microsoft account and need to setup and login to the Microsoft Authenticator app to use the Participant Portal.

You will receive an email detailing the updates you made on the Participant Portal. Once invited users have activated their account, you can manage their access through the organisation's user list.

Note: To invite a user to participate in multiple entities, you can do so by selecting the swap organisation menu item at the top of the primary navigation.

## 4.2. Users across multiple legal entities

A participant may be a user for more than one organisation. For example, Jane Smith could be the primary business contact for Blue Green Pty Ltd and Purple Pins Pty Ltd both of which have Participant Portal accounts. Jane may also want key members from each organisation to participate in both Participant Portal accounts.

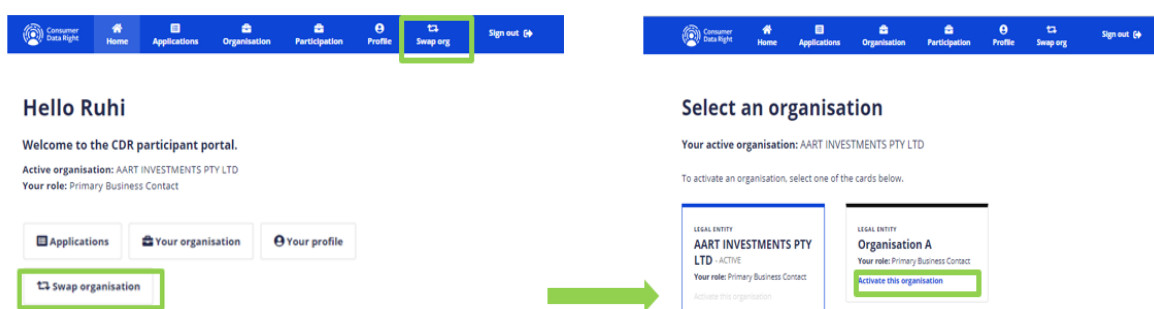
### ! Note

If there are no multiple legal entities associated with you as a user, you will not see the **Swap organisation** menu item in the Participant Portal.

To invite a user from one of your Organisation accounts to participate in a different Organisation:

1. Login to the Participant Portal at <https://portal.cdr.gov.au>. Notice the page will show the organisation you are a member of and your allocated role.
2. To invite a user from a different Organisation account, select the **Swap organisation** button to display the **Select an organisation** screen.
3. Select the other legal entity - in this example, the **Organisation A**.
4. To invite the user to the other legal entity, follow the same steps as mentioned in 4.1 inviting Participants.

Only a primary business contact can invite a user from one organisation account to also be a user for a different organisation account via Swap Organisation menu item.

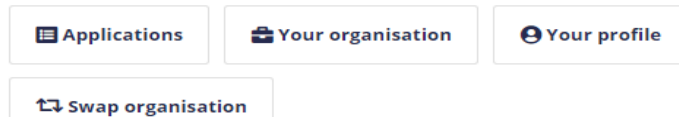


## Hello Ruhi

Welcome to the CDR participant portal.

**Active organisation:** Organisation A

**Your role:** Primary Business Contact



### ! Note

When the primary business contact in this example logs in again - they will see the legal entity and role that they last logged in with. In this example, user is now the primary business contact of Organisation A legal entity.

### 4.3. Modifying a user's access

Only a primary business contact can modify a user's access or role within the Participant Portal. However, there can be multiple primary business contacts on an organisation's portal account.

1. Login to the Participant Portal at <https://portal.cdr.gov.au> and select **Organisation** from the top navigation menu.
2. Select **User list** from the left side navigation menu. You will be shown a table listing all current users (first name, last name, email address and role of the person) within your organisation.
3. Select the **Edit role** option for the user you want to modify.
4. Choose the access type you want to assign to the user. A user's role can be modified at any time by an authorised user (i.e. by a primary business contact).

Consumer Data Right

Home
Applications
**Organisation**
Participation
Profile
Swap org
Sign out

**Organisation**  
Organisation A

Hi Ruhi  
you're acting as **Primary Business Contact**  
for Organisation A.

Explore this section

[Legal entity](#)  
[Update addresses](#)  
[→ User list](#)  
[Change request](#)  
[Agreements](#)  
[Reports](#)  
[CDR Sponsorship Arrangement](#)

**User list**  
Below are the users linked to your organisation.

Invite User

First name ↑	Last name ↑	Email address	Role	Actions
<a href="#">Emily</a>	Mo	<a href="mailto:jamiella02@hotmail.com">jamiella02@hotmail.com</a>	Primary Business Contact	<a href="#">Edit role</a> <a href="#">Remove user</a>
<a href="#">Emma</a>	Harvey	<a href="mailto:emma.harvey@accc.gov.au">emma.harvey@accc.gov.au</a>	Primary Business Contact	<a href="#">Edit role</a> <a href="#">Remove user</a>
<a href="#">John</a>	Lucas	<a href="mailto:john.lucas@organisationa.com">john.lucas@organisationa.com</a>	Authorised CTS Tester	<a href="#">Edit role</a> <a href="#">Remove user</a>

## 4.4. Removing a user's access

Only a primary business contact can remove a user from the Participant Portal. Removing a user is performed from the **User list** - see example below.

When a primary business contact removes a user, a note is shown advising that this step is irreversible, and the selected user will no longer be able to log into the Participant Portal. If the user previously had roles in multiple legal entities (refer to section 4.2 Users across multiple legal entities), they will no longer have access to the legal entity that the remove action is performed on.

Consumer Data Right

Home
Applications
**Organisation**
Participation
Profile
Swap org
Sign out

**Organisation**  
Organisation A

Hi Ruhi  
you're acting as **Primary Business Contact**  
for Organisation A.

Explore this section

[Legal entity](#)  
[Update addresses](#)  
[→ User list](#)  
[Change request](#)  
[Agreements](#)  
[Reports](#)  
[CDR Sponsorship Arrangement](#)

**User list**  
Below are the users linked to your organisation.

Invite User

First name ↑	Last name ↑	Email address	Role	Actions
<a href="#">Emily</a>	Mo	<a href="mailto:jamiella02@hotmail.com">jamiella02@hotmail.com</a>	Primary Business Contact	<a href="#">Edit role</a> <a href="#">Remove user</a>
<a href="#">Emma</a>	Harvey	<a href="mailto:emma.harvey@accc.gov.au">emma.harvey@accc.gov.au</a>	Primary Business Contact	<a href="#">Edit role</a> <a href="#">Remove user</a>
<a href="#">John</a>	Lucas	<a href="mailto:john.lucas@organisationa.com">john.lucas@organisationa.com</a>	Authorised CTS Tester	<a href="#">Edit role</a> <a href="#">Remove user</a>
<a href="#">MANIKOTA</a>	HEWAPATHIRANAGE	<a href="mailto:manikothus33@gmail.com">manikothus33@gmail.com</a>	Primary Business Contact	<a href="#">Edit role</a> <a href="#">Remove user</a>
<a href="#">Roohi</a>	tyed	<a href="mailto:roohiyed3@gmail.com">roohiyed3@gmail.com</a>	Primary Business Contact	<a href="#">Edit role</a> <a href="#">Remove user</a>
<a href="#">Ruhi</a>	seyed	<a href="mailto:ruhi.seyed@accc.gov.au">ruhi.seyed@accc.gov.au</a>	Primary Business Contact	<a href="#">Edit role</a> <a href="#">Remove user</a>

Consumer Data Right

Home
Applications
**Organisation**
Participation
Profile
Swap org
Sign out

**Organisation**  
Organisation A

Hi Ruhi  
you're acting as **Primary Business Contact**  
for Organisation A.

Explore this section

[Legal entity](#)  
[Update addresses](#)  
[→ User list](#)  
[Change request](#)  
[Agreements](#)  
[Reports](#)  
[CDR Sponsorship Arrangement](#)

**Remove User**

First Name

Ruhi

Last Name

tyed

Email Address

roohiyed3@gmail.com

Role

Primary Business Contact

Are you sure you want to remove this user from organisation?  
Please note, this step is irreversible and they will no longer be able to log into the Participant Portal

☒ Yes ☐ No

Update



## 5. Data holders

The Participant Portal allows prospective businesses to register as a data holder and manage their organisation's information.

Data holders can:

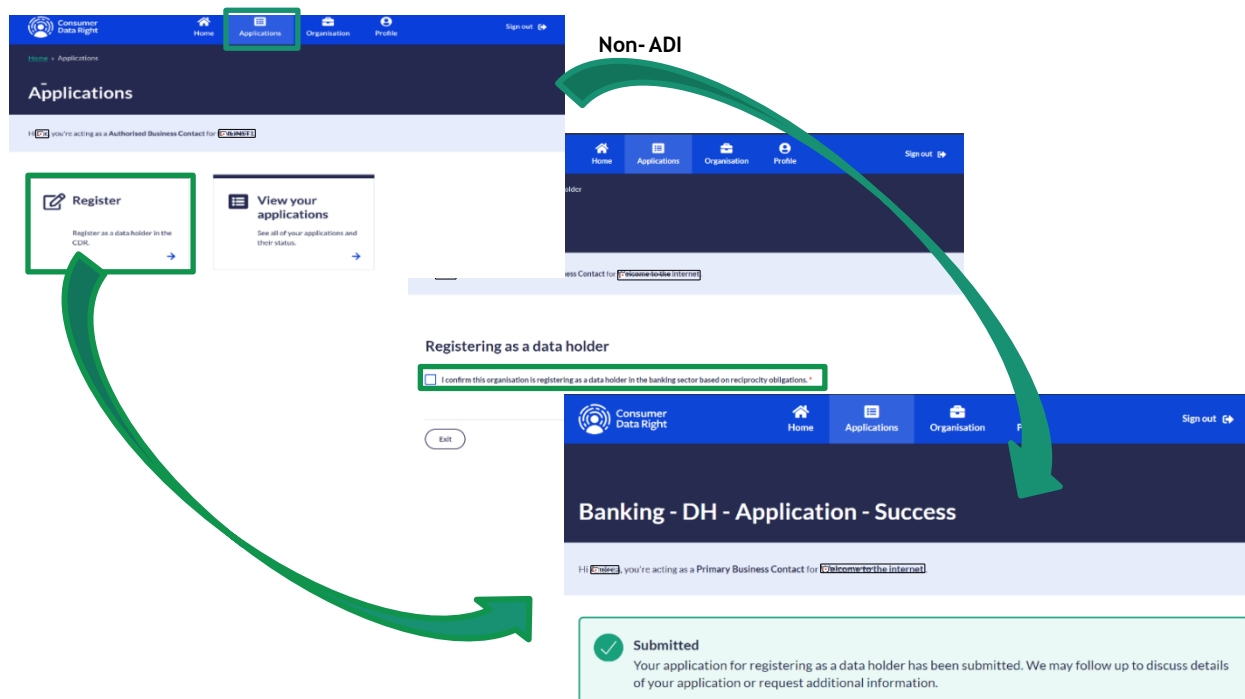
- register as a data holder
- create, update and remove brands
- have their organisation's primary business contact invite other users with other roles within their organisation to manage their participation in CDR
- request certificates and update their brand details, endpoints and authentication details, and submit their endpoints and authentication details for review.

### 5.1. Complete data holder registration

1. Login to the Participant Portal at <https://portal.cdr.gov.au> and select the **Applications** button. Click the **Register** button to display the data holder screen.
2. At the data holder screen, click the **Register** button.
3. If further information is required prior to submitting your registration, an alert will be displayed requesting you to return to the review page to identify the missing information, before resubmitting.
4. Once submitted, you will be shown a note confirming your registration.
5. Following registration, data holders must complete on-boarding activities before becoming active in the CDR ecosystem. You will receive an email detailing these activities. Further information about on-boarding can be found in the [CDR On-boarding guide](#).

If you are not an ADI and are seeking to register as a data holder, when you click the **Register** button, you will need to check the **check box** confirming that your organisation is registering as a data holder in the banking sector based on reciprocity obligations under the CDR Rules.

Once registered as a data holder, you will receive a message confirming your submission and advice that the CDR Team will follow up to discuss details of your application or to request additional information.



## 5.2. Data holder registration

Registration as a data holder on the Participant Portal will only be accepted if an applicant is a data holder under section 56AJ of the *Competition and Consumer Act 2010*, including accredited persons to whom reciprocal data holder obligations apply.

If you are a data holder, you may register under the **Applications** section of the Participant Portal where you will be able to click the **Register** button to begin your registration. A primary business contact or authorised business contact can initiate your registration in the portal.

## 6. Data recipients

### 6.1. Accreditation Levels

There are currently two accreditation levels: Unrestricted and Sponsored

#### 6.1.1. Unrestricted

An unrestricted accreditation allows a data recipient to obtain consent from consumers and collect data from Data Holders without any restrictions for all designated sectors.

There are two types of unrestricted accreditation applications:

- a) Full unrestricted accreditation application

All applicants who are not ADIs will be required to complete the full unrestricted accreditation application.

A sample full unrestricted application form can be viewed at [Sample - standard accreditation application form](#).

b) Streamlined application

Existing Data Holders who are ADIs meet the criteria for streamlined accreditation, and may instead complete the streamlined accreditation form. This application requires reduced information than full unrestricted accreditation application.

A sample streamlined application form can be viewed at [Sample - streamlined application form](#).

### 6.1.2. Sponsored

An applicant intending to participate in CDR via a sponsorship arrangement with an unrestricted accredited data recipient (ADR) will be required to complete the sponsored accreditation application.

## 6.2. Starting an accreditation application

We recommend you read the following guidance before commencing your application to better assist you with understanding the requirements of accreditation.

1. [Accreditation Guidelines](#)
2. [Supplementary Accreditation Guidelines: Insurance](#)
3. [Supplementary Accreditation Guidelines: Information Security](#)
4. [Accreditation Controls Guidance](#)

Only a primary business contact can start and submit an accreditation application. To do this, the primary business contact will need to login to their Participant Portal account. Select **Applications** from the top navigation and then select **Start applications**.

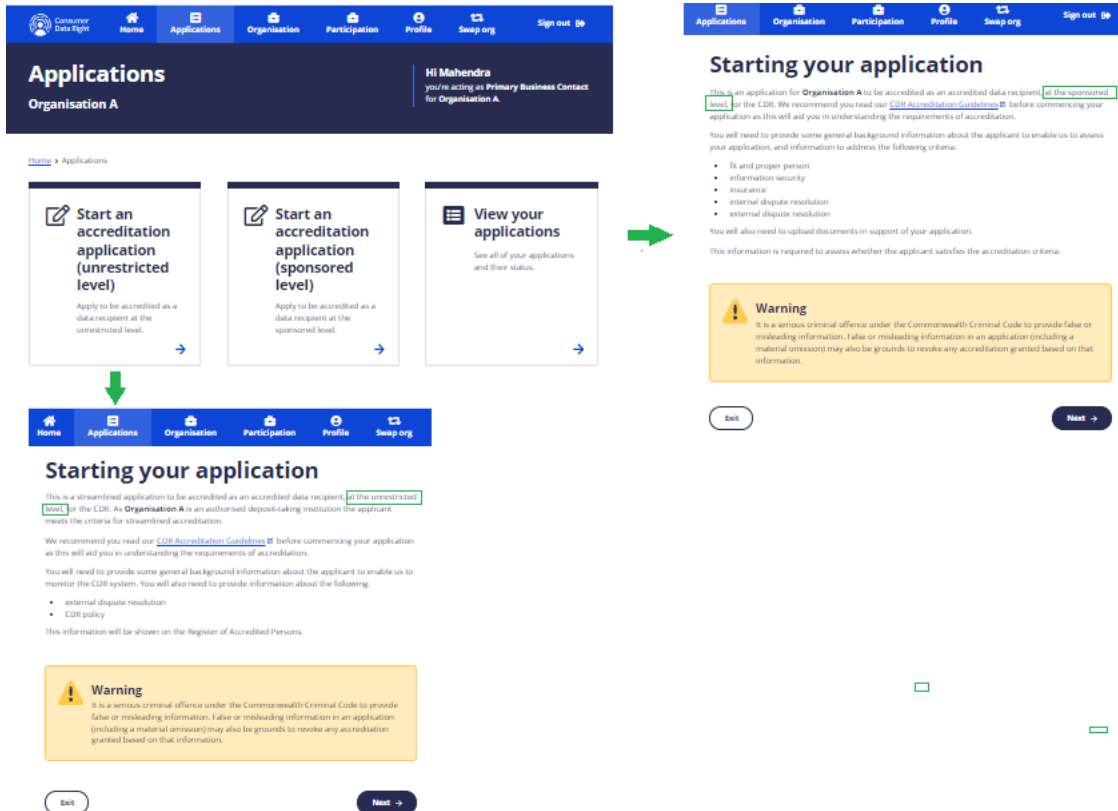
The full unrestricted, streamlined or sponsored accreditation application can be accessed via the **Start application** section and will seek information about the applicant. This information will be used to assess the application, populate the CDR Register, or otherwise administer the CDR system.

Once an application has been started, other users with certain roles can view and update an existing accreditation application. For more information on user roles and permissions, please refer to the [User roles and permissions](#) in this guide.

For all application types, you will need to:

1. Confirm and agree with the way your personal information, provided in your application, will be used and handled. Select the **checkbox** and then **Start application** button.
2. Give general background information about your legal entity.

3. Provide details about all the products/services you will be offering to consumers if accredited.
4. Provide, under the information security section;
  - a. a self-assessment and attestation form if you are a sponsored accreditation applicant
  - b. an assurance report if you are a full unrestricted accreditation applicant
5. Complete the remainder of the form.



## 6.3. Editing your application

An accreditation application with a status of 'draft' can be edited. It cannot be edited once submitted.

To edit an application with a status of 'draft':

1. Login to the Participant Portal at <https://portal.cdr.gov.au> and select **Applications** from the top navigation menu.
2. Under actions select **Edit** for the application you want to edit.
3. Select 'Save and continue' button during navigation of each of the sections that are edited.

Consumer Data Right

Home Applications Organisation Participation Profile Swap org Sign out

## Applications

Organisation A

Hi Mahendra  
you're acting as Primary Business Contact for Organisation A.

Home > Applications > View your applications

### Application list

Below are the applications linked to your organisation.

Data recipient applications - unrestricted level

Enter text to search...

Application ref ↑	Applicant	Started by	Modified on	Status	Actions
DRAP001106	Organisation A	Mahendra Hewa	07/01/2022 3:56 PM	Draft	<a href="#">Edit</a> <a href="#">Withdraw</a> <a href="#">View</a>

## 6.4. Finalising your application

Depending on the application type and your responses to questions on the application form, you will be shown a tailored list of documents that you need to upload before submitting your application.

Once you submit your application, the system will validate it and indicate if any mandatory information is missing. If all mandatory information is provided, you will be shown the following screen confirming your application has been submitted.

Consumer Data Right

Home Applications Organisation Participation Profile Swap org Sign out

## Submitted

Your application for accreditation has been submitted. We may follow up to discuss details of your application or request additional information.

Your application number is DRAP000298

## 6.5. Withdrawing your application

If you no longer wish to continue with your accreditation application, and the application has a status of 'draft', it can be withdrawn by a primary business contact.

To withdraw an application with a status of 'draft':

1. Login to the Participant Portal at <https://portal.cdr.gov.au> and select **Applications** from the top navigation menu.
2. Under actions select **Withdraw** for the application you want to withdraw.

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# Applications

Organisation A

Hi Mahendra  
you're acting as Primary Business Contact for Organisation A.

[Home](#) > [Applications](#) > View your applications

## Application list

Below are the applications linked to your organisation.

Data recipient applications - sponsored level

Enter text to search...

Application ref ↑	Applicant	Started by	Modified on	Status	Actions
DRAP101715	Organisation A	Mahendra Hewa	07/01/2022 3:56 PM	Draft	<a href="#">Edit</a> <a href="#">Withdraw</a> <a href="#">View</a>
DRAP101713	Organisation A	Ruhi Saiyed	04/01/2022 1:09 PM	Submitted	<a href="#">View</a>
DRAP101704	Organisation A	Mahendra Hewa	19/12/2021 10:47 AM	Withdrawn	<a href="#">View</a>

If the application has an application status other than ‘draft’, it can be withdrawn by submitting a change request.

To withdraw the application with other statuses:

1. Login to the Participant Portal at <https://portal.cdr.gov.au> and select **Organisation** from the top navigation menu.
2. Select **Change request** from the left-hand navigation menu and select **Notify or request a change**.
3. Under **Notify or request a change** select **Withdraw submitted application**.
4. Select the application that you would like to withdraw and select **Submit request**.

The screenshot shows the 'Organisation' page in the Participant Portal. The 'Notify or request a change' section is active, displaying a list of change types. The 'Withdraw submitted application' option is selected and highlighted with a red box. Below this, there is a text area for the reason for withdrawal and a section for uploading supporting documents. A blue information box at the bottom states: 'You are about to request the withdrawal of a submitted application. Once approved, your application will be removed from the CDR Participation Portal and you will be notified when finalised. Please note this action cannot be undone.' A red 'Submit request' button is located at the bottom right.

## 6.6. Submitting your application

On submission of your application, you will receive an email with your application number.

To check the status of your application at any time, login to the Participant Portal at <https://portal.cdr.gov.au> and select **Applications** from the home page then **View applications**.

If you have any questions about your application, please contact us via the Jira Support Portal at [Jira Customer Portal](#). Example email: **DRAPxxxxxx: Your application has been submitted - Email ID:xxxxxx**

Your application for <Your organisation name> to participate in the Consumer Data Right as an accredited data recipient has been submitted.

Your application will be assessed and we may contact you for additional information during the assessment process. To check the status of your application at any time, please click [here](#).

If you have any questions about your application, please contact the Consumer Data Right Team using the contact details provided below.

## 6.7. Amending an application and other change requests

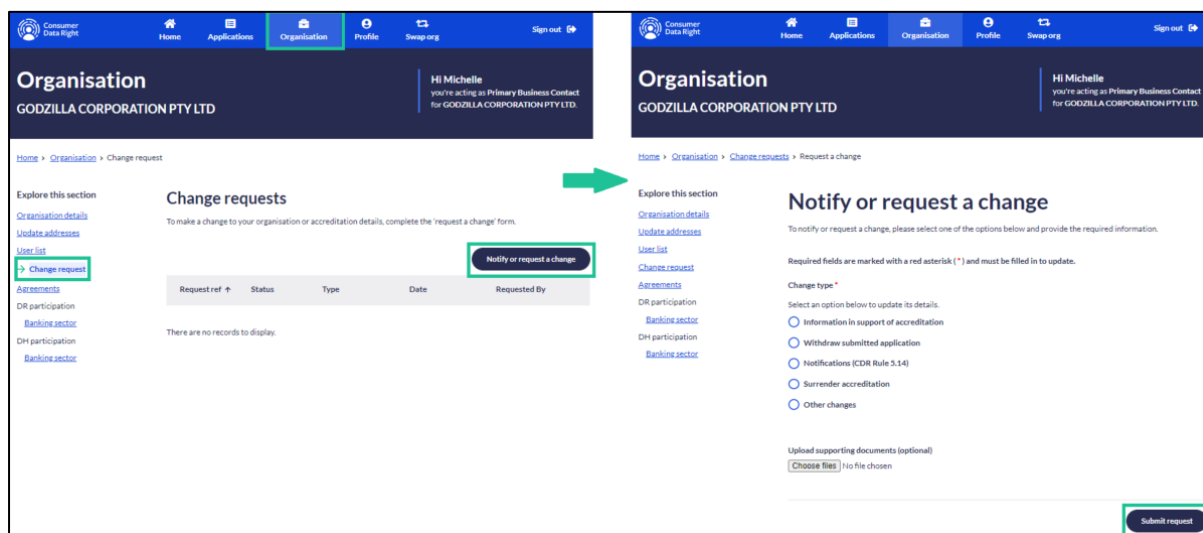
Once an application has been submitted, a primary business contact or an authorised business contact will be able to view the submitted accreditation application and provide

further information in support of the application, request to withdraw a submitted application, and notify or request other changes by raising a 'change request' from the Participant Portal. Any additional information submitted in relation to an application for accreditation will be considered by the Data Recipient Accreditor alongside the original information contained in the application.

Once accredited, this capability can also be used by accredited data recipients to notify the Data Recipient Accreditor of any notification requirements required under rule 5.14 of the CDR Rules.

#### To access change requests:

1. Login to the Participant Portal at <https://portal.cdr.gov.au> and select **Organisation** from the top navigation menu.
2. Select **Change request** from the left side navigation menu.
3. Click on the **Notify or Request a change** button.
4. Select the change type:
  - information in support of accreditation
  - withdraw submitted application
  - notifications (CDR Rule 5.14)
  - surrender accreditation
  - other changes.
5. Complete supporting information and upload documents if required.
6. Click on the **Submit request** button.



## 6.8. Incomplete applications

An application will be returned to you as a draft if it is considered to be incomplete. You will be advised which areas of the application are incomplete and afforded an opportunity to provide the missing information and resubmit your application.



Applications that have been returned to draft status are displayed in the **Application list** section of the Participant Portal which can be edited to provide requested missing information.

The primary business contact who submitted the application will also receive an email notification advising the application is incomplete and has been returned as a draft.

## 7. Post accreditation or registration

Following accreditation or registration, participants must be on-boarded before they become active participants in the CDR ecosystem. As part of the on-boarding process, participants must accept the following agreements:

- Subscriber Agreement
- Relying Party Agreement.

The following agreement is required in order to use the CDR Trademark:

- CDR Trademark Licence Agreement.

The Trademark Licence agreement is mandatory to be signed if the participant is a Data Recipient or both Data holder and Data Recipient.

The image displays three screenshots of the Participant Portal interface, illustrating the process to view and accept agreements.

**Top Left Screenshot: Agreements list**

The 'Organisation' page shows the 'Agreements list' table. The table has columns: Reference, Agreement, Version, Version status, Accepted on, and Actions. The data rows are:

Reference	Agreement	Version	Version status	Accepted on	Actions
AGR001960	Subscriber agreement	1.07	Not Active	14/12/2021	<a href="#">View</a>
AGR001958	Relying party agreement	1.07	Not Active	14/12/2021	<a href="#">View</a>
AGR002551	Relying party agreement	1.08	Current		<a href="#">View</a>
AGR002632	Trade mark license agreement	1.13	Current		<a href="#">View</a>
AGR002714	Subscriber agreement	1.10	Current		<a href="#">View</a>

Green arrows indicate the flow from the 'View' action in the table to the respective agreement detail pages.

**Top Right Screenshot: Relying party agreement**

The 'Agreement' page for 'Relying party agreement' shows the 'View and read agreement' button. Below the button, the text reads: 'Organisation A - Relying party agreement: AGR002551'. The agreement content includes two checkboxes:

- ☐ I have read the agreement and accept on behalf of this organisation
- ☐ I am the duly authorised representative who warrants that I have the authority to sign this agreement on behalf of this organisation.

**Bottom Left Screenshot: Subscriber agreement**

The 'Agreement' page for 'Subscriber agreement' shows the 'View and read agreement' button. Below the button, the text reads: 'Organisation A - Subscriber agreement: AGR002714'. The agreement content includes two checkboxes:

- ☐ I have read the agreement and accept on behalf of this organisation
- ☐ I am the duly authorised representative who warrants that I have the authority to sign this agreement on behalf of this organisation.

**Bottom Right Screenshot: Trade mark license agreement**

The 'Agreement' page for 'Trade mark license agreement' shows the 'View and read agreement' button. Below the button, the text reads: 'Organisation A - Trade mark license agreement: AGR002632'. The agreement content includes two checkboxes, both of which are checked:

- ☒ I have read the agreement and accept on behalf of this organisation \*
- ☒ I am the duly authorised representative who warrants that I have the authority to sign this agreement on behalf of this organisation. \*

An 'Accept' button is visible at the bottom of the page.

Participants can view both signed and latest version of the agreements in the participant portal at all times. Select Organisation in the primary navigation> click Agreement in the left navigation panel

Consumer Data Right

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Organisation

Organisation A

Hi Ruhi  
you're acting as **Primary Business Contact**  
for **Organisation A**.

Explore this section

[Legal entity](#)  
[Update addresses](#)  
[User list](#)  
[Change request](#)  
[→ Agreements](#)  
[Reports](#)  
[CDR Sponsorship Arrangement](#)

## Agreements list

Reference	Agreement	Version	Version status	Accepted on ↑	Actions
<a href="#">AGR001960</a>	Subscriber agreement	1.07	Not Active	14/12/2021	<a href="#">View</a>
<a href="#">AGR001958</a>	Relying party agreement	1.07	Not Active	14/12/2021	<a href="#">View</a>
<a href="#">AGR002551</a>	Relying party agreement	1.08	Current		<a href="#">View</a>
<a href="#">AGR002632</a>	Trade mark license agreement	1.13	Current		<a href="#">View</a>
<a href="#">AGR002714</a>	Subscriber agreement	1.10	Current		<a href="#">View</a>

Acceptance of the Subscriber Agreement and the Relying Party Agreement is required once only, and not subsequently when a new agreement is published.

A sponsored Accredited data recipient will only receive and accept the CDR Trademark Licence Agreement.

If an agreement requires action, a notification will be displayed when the participant signs in. All users within the organisation will be able to see that action is required.

All users can view the agreements, but only the legal authority contact can accept or action the agreements within the Participant Portal.

For more information on user roles and permissions, please refer to [User roles and permissions](#) in this guide.

## 8. Manage organisation details

Details such as your organisation details, reports, agreements and CDR arrangements can be viewed and maintained by selecting **Organisation** from the primary navigation.

### 8.1. Maintain organisation details

Only a primary business contact has the ability to update all of your legal entity's organisation details. An authorised business contact, primary IT contact and authorised IT contact can view organisation details and update selected entries. Once updated, the participant's information on the CDR Register will be updated with the new information.

1. Login to the Participant Portal at <https://portal.cdr.gov.au> and select **Organisation**.

Consumer Data Right Participant Portal

Home Applications Organisation Participation Profile Swap org Sign out

## Organisation

Organisation A

Hi Ruhi  
you're acting as Primary Business Contact for Organisation A

Explore this section

- Legal entity
- Update addresses
- User list
- Change request
- Acceptance
- Reports
- CDR Sponsorship Arrangement

### Legal entity details

Legal entity name  
Organisation A

Legal entity type  
—

Legal entity data recipient status  
Accredited

Accreditation Level  
Sponsored

Accreditation Number  
ADBNK565506

Legal entity data holder status  
Registered

Provider Number  
DHBK565555

Legal entity GUID  
a4b70a3-425c-4c11-a836-00003a88851d

Your changes will take up to 5 minutes to update on the Register and APIs.

Legal entity website URL \*

Legal entity logo URI \*

Legal entity CDR policy URI \*

Update legal entity details

2. The landing page displays the Organisation details in which you can update your legal entity details:

- logo URI
- website URL
- CDR policy URL.

These details can be updated by a user who has been assigned a primary business contact, authorised business contact, primary IT contact or authorised IT contact role.

3. If you need to update your address, select **Update addresses** in the left side navigation menu to update your registered business addresses, address for service and select **Update details**.

**Organisation**  
Organisation A

Hi Ruhi  
you're acting as Primary Business Contact for Organisation A.

**Update addresses**  
Required fields are marked with a red asterisk (\*) and must be filled in to update.

**Registered business address**

Address line 1 \*  
101 Test Street

Address line 2

Suburb or town \*  
Melbourne

Postcode \*  
3000

State or territory \*  
Victoria

Country \*  
Australia

**Registered business address for service**

Address line 1  
101 Test Street

Address line 2

Suburb or town  
Melbourne

Postcode  
3000

State or territory  
Victoria

Country  
Australia

Electronic address for service \*  
info@organisationa.com

**Update**

The registered business address can be updated by a user who has been assigned a primary business contact or authorised business contact role.

The addresses for service for a local agent can only be updated by a primary business contact.

### ! Note

More information regarding the definitions of the organisation's details can be found in the [Consumer Data Right participant on-boarding guide](#).

## 8.2. CDR Representative Arrangement Notification

The CDR Representative Arrangement model enables the provision of goods and services to consumers using CDR data in circumstances where the unaccredited persons are in a CDR Representative Arrangement with an unrestricted accredited person.

Once notified, the Data Recipient Accreditor will verify the arrangement and the Registrar publish details of the arrangement on the CDR Register <https://www.cdr.gov.au/for-providers/representative-arrangements>.

Only a Primary Business Contact or a Legal Authority Contact has the ability to access the CDR Representative Arrangement Notification for an unrestricted accredited data recipient.

To notify the Data Recipient Accreditor of a CDR Representative Arrangement, follow the steps below:

1. Login to the CDR Participant Portal at <https://portal.cdr.gov.au> and select Organisation from the top navigation menu.
2. Select 'CDR Representative Arrangement' from the 'Explore this section' menu.
3. You will be navigated to the CDR Representative Arrangement Notification Form where you can complete the mandatory details and submit.

## 8.3. CDR Sponsorship Arrangement Notification

Unrestricted ADRs (as the sponsor) are required to notify the ACCC when entering into or terminating sponsorship arrangements with accredited or non-accredited affiliates.

Only a Primary Business Contact or a Legal Authority Contact has the ability to access the CDR Sponsorship Arrangement Notification process.

### 8.3.1. Notify starting of a sponsorship arrangement

To notify starting of a CDR Sponsorship Arrangement with an **accredited** affiliate, follow the steps below:

1. Login to the CDR Participant Portal at <https://portal.cdr.gov.au> and select Organisation from the top navigation menu.
2. Select 'CDR Sponsorship Arrangement' from the 'Explore this section' menu.
3. Select 'Notify new sponsorship arrangement'. You will be navigated to the CDR Sponsorship Arrangement Notification Form where you can complete the mandatory details and submit.
4. Once submitted, the sponsorship arrangement details will be displayed under 'CDR Sponsorship Arrangement'.
5. To notify of sponsorship arrangement details with a different accredited affiliate, follow the steps 2 to 4.

The process involves the following steps:

- Navigate to the 'Sponsorship arrangement details' section and click 'Notify new sponsorship arrangement'.
- Complete the 'CDR Sponsorship Arrangement Notification' form with the following details:
  - Sponsored ADR legal entity name:
  - Arrangement start date:
  - Acknowledgement: ☐ I declare that all the information I have given in this form is complete and correct.
- Click 'Submit'.
- Review the 'Submitted' confirmation message: 'You have submitted your CDR Sponsorship Arrangement form. Your reference number is **LEA001038**'.

To notify starting of a CDR Sponsorship Arrangement with a **non-accredited** affiliate, follow the steps below:

1. Login to the CDR Participant Portal at <https://portal.cdr.gov.au> and select Organisation from the top navigation menu.
2. Select 'CDR Sponsorship Arrangement' from the 'Explore this section' menu.
3. Select 'Notify new sponsorship arrangement'. You will be navigated to the CDR Sponsorship Arrangement Notification Form
4. Select 'email' and follow the instructions in the next page. Select the notification type as 'New Arrangement'

**Organisation A**

Hi Mahendra  
you're acting as Primary Business Contact for Organisation A

Explore this section  
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[CDR Sponsorship Arrangement](#)

### CDR Sponsorship Arrangement Notification

This form should be completed by an accredited data recipient to notify the Data Recipient Accreditor of a CDR Sponsorship Arrangement.

Where an affiliate is not yet accredited notify of [the status](#). Please note you will not be able to collect data on behalf of your affiliate until they are accredited.

Sponsored ADR legal entity name \*

Arrangement start date \*

Acknowledgement  
☐ I declare that all the information I have given in this form is complete and correct. \*

[Back to CDR sponsorship arrangement](#)
[Submit](#)

**Organisation A**

Hi Mahendra  
you're acting as Primary Business Contact for Organisation A

Explore this section  
[Legal entity](#)  
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### CDR Sponsorship Arrangement Notification for Non-Accredited Affiliates

Please copy and paste the information below into an email with the requested information and email to [ACCC-CDR@acc.gov.au](mailto:ACCC-CDR@acc.gov.au) to notify the Data Recipient Accreditor of a Sponsorship Arrangement with a non-accredited affiliate.

**Subject line:**  
 Notification for CDR Sponsorship Arrangement between Sponsor (Accredited Data Recipient Legal Entity Name) and Affiliate (Legal Entity Name of Non-Accredited Affiliate)

**Body of email:**  
**Notification Type:** (New Arrangement or End of Arrangement)  
**Effective Date:** (Start Date for a new arrangement or End Date for an arrangement that has been suspended, terminated or expired)  
**Details of Accredited Data Recipient**  
 Accredited data recipient legal entity name:  
 Accreditation number:  
 Contact person:  
 Contact person CDR Participant Portal role (eg Primary Business Contact or Legal Authority Contact)  
**Details of Non-Accredited Affiliate**  
 Legal entity name:  
 ABN or business registration number:  
 Business address:  
 Nature of good and services provided by the CDR Affiliate:  
 Any additional comments:  
**Details of CDR Affiliate responsible persons**  
**Person 1**  
 Name:  
 Position:  
 Phone Number:  
 Email Address:  
 Please include additional responsible persons as required.  
 The details you provided will be made available via the CDR Participant Portal once the Affiliate is accredited.  
 The above details you provide and email to [ACCC-CDR@acc.gov.au](mailto:ACCC-CDR@acc.gov.au) will satisfy the requirement under rule 5.14 (2) (a) or (b) of the CDR Rules to notify the Data Recipient Accreditor of the commencement or end of a CDR Sponsorship Arrangement. To make changes to these details, please submit another completed email to [ACCC-CDR@acc.gov.au](mailto:ACCC-CDR@acc.gov.au)  
 This email notification process is an interim process and will be replaced with a function in the CDR Participant Portal in the future.  
**Declaration**  
 I declare that all the information I have given in this email is complete and correct.

### 8.3.2. Notify ending of a sponsorship arrangement

To notify ending of a CDR Sponsorship Arrangement with an **accredited** affiliate, follow the steps below:

1. Login to the CDR Participant Portal at <https://portal.cdr.gov.au> and select Organisation from the top navigation menu.
2. Select 'CDR Sponsorship Arrangement' from the 'Explore this section' menu. You will be navigated to the CDR Sponsorship Arrangement Notification Form where you can complete the mandatory details and submit.

**Organisation**  
Organisation A

Hi Mahendra  
you're acting as Primary Business Contact for Organisation A.

Explore this section  
[Legal entity](#)  
[Update addresses](#)  
[User list](#)  
[Change requests](#)  
[Agreements](#)  
[Reports](#)  
[CDR Sponsorship Arrangement](#)

**Sponsorship arrangement details**

Notify new sponsorship arrangement

Affiliate legal entity name	Arrangement start date	Arrangement end date	Status	Actions
AART INVESTMENTS PTY LTD	01/01/2022		Active	<a href="#">End arrangement</a>

**CDR Sponsorship Arrangement Notification**

This form should be completed by an accredited data recipient to notify the Data Recipient Accreditor that a CDR sponsorship arrangement is expiring or has expired.

Sponsored ADR legal entity name  
AART INVESTMENTS PTY LTD

Arrangement start date  
01/01/2022

Arrangement end date \*

[Back to CDR sponsorship arrangement](#) [Submit](#)

**Organisation**  
Organisation A

Hi Mahendra  
you're acting as Primary Business Contact for Organisation A.

Explore this section  
[Legal entity](#)  
[Update addresses](#)  
[User list](#)  
[Change requests](#)  
[Agreements](#)  
[Reports](#)  
[CDR Sponsorship Arrangement](#)

**Sponsorship arrangement details**

Notify new sponsorship arrangement

Affiliate legal entity name	Arrangement start date	Arrangement end date	Status	Actions
AART INVESTMENTS PTY LTD	01/01/2022	05/01/2022	Active	<a href="#">End arrangement</a>

**Submitted**

You have submitted an end date for your CDR Sponsorship Arrangement.  
Your reference number is LEAD01038.

To notify ending of a CDR Sponsorship Arrangement with a **non-accredited** affiliate, follow the same steps above to notify starting of a CDR Sponsorship Arrangement for a **non-accredited** affiliate; however, selecting the notification type as 'End of Arrangement'.

### 8.3.3. Viewing sponsorship arrangements

If you are a Sponsor:

- A list of all sponsorship arrangements will be available under 'Explore this section' menu --> 'CDR Sponsorship Arrangement' with corresponding affiliate details

If you are an Affiliate:

- A list of all sponsorship arrangements will be available under 'Explore this section' menu --> 'CDR Sponsorship Arrangement' with corresponding sponsor details

## 9. Manage participation details

### ! Note

The Participation section only displays when a legal entity has applied to be either a data holder or data recipient.

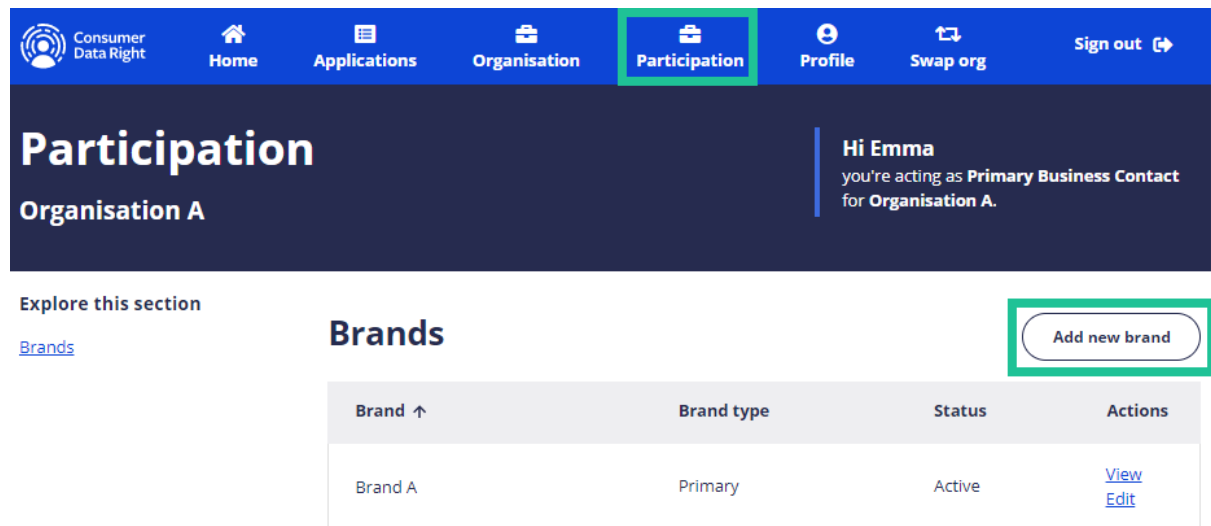
### 9.1. Maintain brand details

A brand is a specific name that is used to collectively identify a set of products and services offered by a participant. This will be aligned to, and may or may not be the same as, a business name that is registered to the participant's organisation.

Participants would typically have one or more brands within the CDR. Brands can be added or removed.

Brand can be added following accreditation or registration. To add a brand, follow the steps below:

1. Login to the Participant Portal at <https://portal.cdr.gov.au> and select **Participation** from the top navigation menu.
2. Select the **Add new brand** button and complete the form.
3. To add additional brands, select **Add new brand** and complete the form.



The screenshot shows the Participant Portal interface. The top navigation bar is blue with icons and labels for Home, Applications, Organisation, Participation (highlighted with a green box), Profile, Swap org, and Sign out. Below the navigation bar, the main header area is dark blue with the text 'Participation' and 'Organisation A'. To the right, a user greeting says 'Hi Emma' and 'you're acting as Primary Business Contact for Organisation A.' Below the header, there's a section titled 'Explore this section' with a link to 'Brands'. The 'Brands' section features a table with columns: Brand ↑, Brand type, Status, and Actions. The table contains one row for 'Brand A' with type 'Primary' and status 'Active'. In the Actions column, there are links for 'View' and 'Edit'. A green box highlights the 'Add new brand' button in the top right corner of the Brands section.

Brand ↑	Brand type	Status	Actions
Brand A	Primary	Active	<a href="#">View</a> <a href="#">Edit</a>

To edit existing brand details, please follow the steps below:

1. Login to the Participant Portal at <https://portal.cdr.gov.au> and select **Participation** from the top navigation menu.
2. Select **Edit** against the brand that you wish to edit.
3. Complete the form and select **Update**.



The top screenshot shows the 'Participation' page for 'Organisation A'. The 'Brands' table lists 'Brand A' as 'Primary' and 'Active'. The 'Edit' link in the 'Actions' column is highlighted with a green box. A large green arrow points from this link to the bottom screenshot.

The bottom screenshot shows the 'Edit brand' form. It contains the following fields:

- Brand name \***: Text input field containing 'Brand A'.
- Brand description \***: Text area containing 'This is a test brand'.
- Brand type \***: Dropdown menu currently showing 'Primary'.

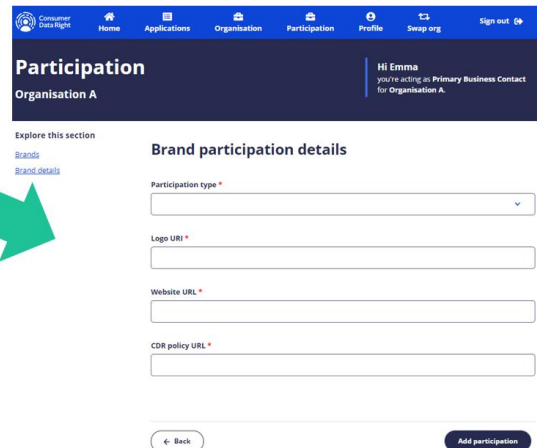
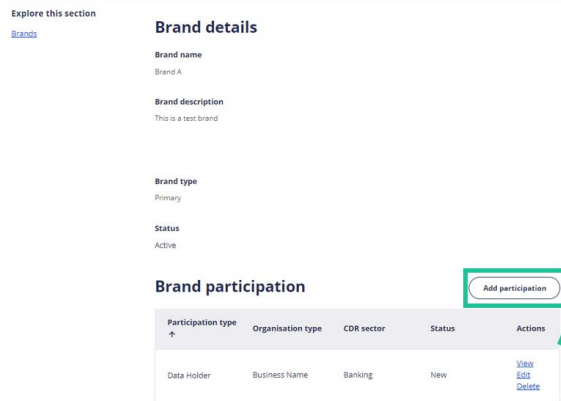
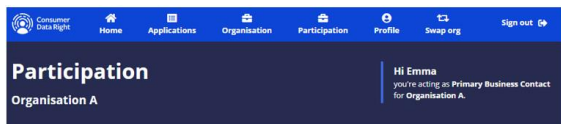
At the bottom of the form are two buttons: 'Back' and 'Update'.

## 9.2. Maintain brand participation details

Brand participation details allow participants to manage details such as which sectors a given brand is a data holder for.

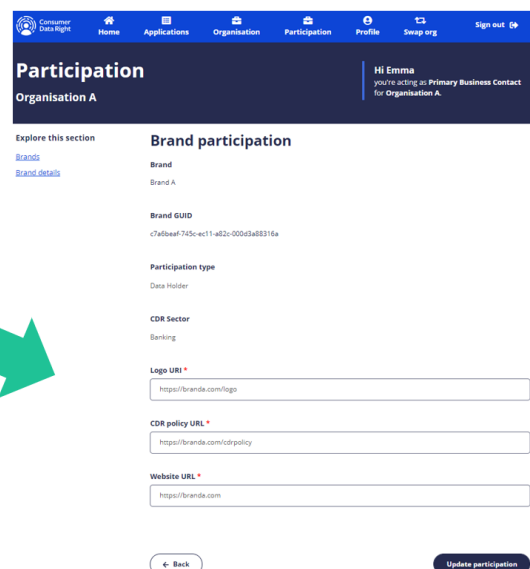
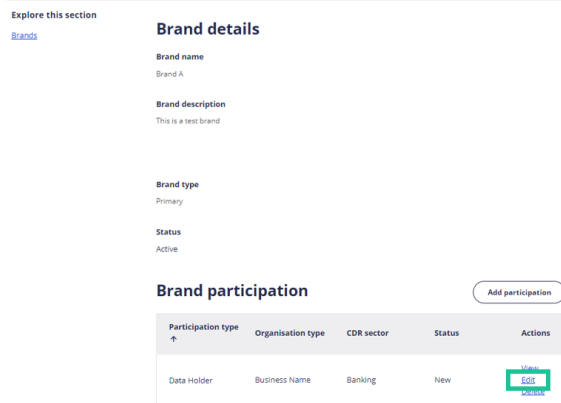
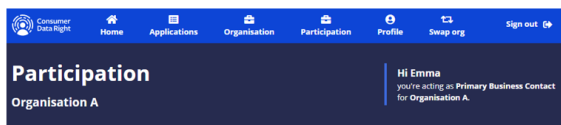
To add brand participation details following the steps below:

1. Login to the Participant Portal at <https://portal.cdr.gov.au> and select **Participation** from the top navigation menu.
2. Select **View** against the brand that you wish to update.
3. Select **Add participation** and fill in the form.



To edit brand participation details following the steps below:

1. Login to the Participant Portal at <https://portal.cdr.gov.au> and select **Participation** from the top navigation menu.
2. Select **Edit** against the brand participation that you wish to update and fill in the form.



To delete brand participation details following the steps below:

1. Login to the Participant Portal at <https://portal.cdr.gov.au> and select **Participation** from the top navigation menu.

2. Select **Delete** against the brand participation that you wish to delete and confirm that you wish to delete the brand participation.

**Participation**  
Organisation A

Hi Emma  
you're acting as Primary Business Contact for Organisation A.

Explore this section  
[Brands](#)

**Brand details**

**Brand name**  
Brand A

**Brand description**  
This is a test brand

**Brand type**  
Primary

**Status**  
Active

**Brand participation** Add participation

Participation type ↑	Organisation type	CDR sector	Status	Actions
Data Holder	Business Name	Banking	New	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>

### 9.3. Maintain software product details

Unrestricted data recipients can create software products which will enable the collection of data from data holders.

#### ! Note

Only a primary IT contact and authorised IT contact can add or edit software product details

To add new software products, please follow the steps below:

1. As a primary IT contact or authorised IT contact, login to the Participant Portal at <https://portal.cdr.gov.au> and select **Participation** from the top navigation menu.
2. Select the **View** action on the brand that the software product that you wish to update
3. Select the **View** action on the brand participation that the software product that you wish to update
4. Select the **Add software product** button and fill in the form

**Participation**  
Organisation A

Hi Emma  
you're acting as Primary Business Contact for Organisation A.

Explore this section  
[Brands](#)  
[Brand details](#)

**Brand participation**

**Brand name**  
Brand A

**Brand GUID**  
020d0deb-4d6f-ec11-a82d-000d3a88316a

**Participation type**  
Data Recipient

**Logo URI**  
<https://www.logo.com>

**CDR Policy URL**  
<https://www.cdr-policy.com>

**Website URL**  
<https://www.website.com>

**Status**  
New

**Software products**

Product ref	Name	Status	Approval date	Actions
DRSP001097	Example Software Product	New		<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>

[Add software product](#)

**Add software product**  
Organisation A

Hi Emma  
you're acting as Primary Business Contact for Organisation A.

Explore this section  
[Brands](#)  
[Brand details](#)  
[Brand participation](#)

**Add software product**

Complete this form to add a software product to this brand  
Required fields are marked with a red asterisk (\*) and must be filled in to save.

**Software product details**

**Name \***

**Description \***

[Add software product](#)

To maintain existing software products, please follow the steps below:

1. As a primary IT contact or authorised IT contact, login to the Participant Portal at <https://portal.cdr.gov.au> and select **Participation** from the top navigation menu.
2. Select the **View** action on the brand that the software product that you wish to update
3. Select the **View** action on the brand participation that the software product that you wish to update
4. Select the **Edit** action and fill in the form

**Participation**  
Organisation A

Hi Emma  
you're acting as Primary Business Contact for Organisation A.

Explore this section  
[Brands](#)  
[Brand details](#)

**Brand participation**

Brand name  
Brand A

Brand GUID  
020d0ceb-4d6fec11-a82a-000a3a88316a

Participation type  
Data Recipient

Logo URI  
<https://www.logo.com>

CDR Policy URL  
<https://www.cdrpolicy.com>

Website URL  
<https://www.website.com>

Status  
New

**Software products**

[Add software product](#)

Product ref	Name ↑	Status	Approval date	Actions
DRSP001097	Example Software Product	New		<a href="#">Edit</a>

**Participation**  
Organisation A

Hi Emma  
you're acting as Primary Business Contact for Organisation A.

Explore this section  
[Brands](#)  
[Brand details](#)  
[Brand participation](#)

**Edit software product**

Name \*

Description \*

Software Product Reference  
DRSP001097

Software Product GUID  
2d1040f2-4d6fec11-a82a-000a3a88316a

Status  
New

[← Back](#) [Update software product](#)

## 9.4. Maintain PKI certificates

Public Key Infrastructure (PKI) certificates are a key component used in the CDR ecosystem to provide secure and private communications between participants. The ACCC, as the Registrar is responsible for issuing PKI certificates to participants. Participants will be asked to request certificates - one for the environment the participant will test in, and one for the production environment, as part of the on-boarding process.

### ! Note

Only a primary business contact, primary IT contact and authorised IT contact can request, revoke and renew certificates.

For detailed information about certificates and how to request test and production certificates, please refer to 'ACCC CDR Register Reference guide' and the 'On-boarding guide' which can be found on the [Resources page on the CDR Website](#).

To manage production certificates for a brand, please follow the instructions below:

1. Login to the Participant Portal at <https://portal.cdr.gov.au> and select **Participation** from the top navigation menu.
2. Select the **View** action on the brand that you wish to update
3. Select the **View** action on the brand participation for the brand that you wish to update
4. Select the **Production details** tile towards the bottom of the page

To manage production certificates for software product, please follow the instructions below:

1. Login to the Participant Portal at <https://portal.cdr.gov.au> and select **Participation** from the top navigation menu.
2. Select the **View** action on the brand that the software product that you wish to update
3. Select the **View** action on the brand participation that the software product that you wish to update
4. Select the **View** action on the software product that you wish to update
5. Select the **Production details** tile towards the bottom of the page

### 9.4.1. Request a production certificate

Data holder and data recipients can request for a brand or software product certificate via the Participant Portal once a data holder brand or data recipient software products are added. Simply select the button outlined in the image below to request a new certificate.

Software product certificates				
				<a href="#">Request a certificate</a>
Certificate Ref	Common Name	Status ↑	Expiry Date	Actions
<a href="#">CE001289</a>	19117uattest.com	Valid	27/07/2021	<a href="#">Download</a> <a href="#">Renew</a> <a href="#">Revoke</a> <a href="#">View</a>
<a href="#">CE001290</a>	19118uattest.com	Valid	18/10/2021	<a href="#">Download</a> <a href="#">Revoke</a> <a href="#">View</a>

### 9.4.2. Revoke a production certificate

Data holders and data recipients can revoke their existing valid production certificate. Upon revocation, the system sends revocation data and reflects the change status in near real time to help participants better manage their brands and software products. To revoke a production certificate select the **Revoke** action and confirm your selection.

Software product certificates				
				<a href="#">Request a certificate</a>
Certificate Ref	Common Name	Status ↑	Expiry Date	Actions
<a href="#">CE001289</a>	19117uattest.com	Valid	27/07/2021	<a href="#">Download</a> <a href="#">Renew</a> <a href="#">Revoke</a> <a href="#">View</a>
<a href="#">CE001290</a>	19118uattest.com	Valid	18/10/2021	<a href="#">Download</a> <a href="#">Revoke</a> <a href="#">View</a>

### 9.4.3. Renew a production certificate

Data holder and data recipients can renew an existing production certificate using the Participant Portal so that the brand or soft product can continue to transfer data securely within the ecosystem. This option will become available 30 days before a valid certificate's expiry date. To renew a production certificate, select the **Renew** action and confirm the details of the certificate.

#### Software product certificates

[Request a certificate](#)

Certificate Ref	Common Name	Status ↑	Expiry Date	Actions
<a href="#">CE001289</a>	19117uattest.com	Valid	27/07/2021	<a href="#">Download</a> <a href="#">Renew</a> <a href="#">Revoke</a> <a href="#">View</a>
<a href="#">CE001290</a>	19118uattest.com	Valid	18/10/2021	<a href="#">Download</a> <a href="#">Revoke</a> <a href="#">View</a>

### 9.5. Maintain authentication details

Primary business contacts, primary IT contacts and authorised IT contacts can maintain authentication details (software security token information) on the [Participant Portal](#). For detailed technical information about authentication, please refer to the 'ACCC CDR Register Reference guide' which can be found on the [Resources page on the CDR Website](#).

To manage production authentication details for a brand, please follow the instructions below:

1. Login to the Participant Portal at <https://portal.cdr.gov.au> and select **Participation** from the top navigation menu.
2. Select the **View** action on the brand that you wish to update
3. Select the **View** action on the brand participation for the brand that you wish to update
4. Select the **Production details** tile towards the bottom of the page
5. To update incomplete authentication details, select the **Edit** action
6. To add new authentication details, select the **Add** button

To manage production authentication details for software product, please follow the instructions below:

1. Login to the Participant Portal at <https://portal.cdr.gov.au> and select **Participation** from the top navigation menu.
2. Select the **View** action on the brand that the software product that you wish to update

3. Select the **View** action on the brand participation that the software product that you wish to update
4. Select the **View** action on the software product that you wish to update
5. Select the **Production details** tile towards the bottom of the page
6. To update incomplete authentication details, select the **Edit** action
7. To add new authentication details, select the **Add** button

## 10. Rule 9.4 Reporting

Rule 9.4 reports can be completed and lodged on the Participant Portal so that accredited data recipients and data holders can meet their reporting obligations under rule 9.4 of the *Competition and Consumer (Consumer Data Right) Rules 2020 (Cth)*.

The reporting process on the Participant Portal allows participants to:

- Edit, save and submit a report at any time before the due date.
- View and download a submitted report.
- Receive email reminder about upcoming due date.

### ! Note

By lodging the report via the Participant Portal, CDR participants will satisfy the requirement of submitting their reports to both the ACCC and the Office of Australian Information Commissioner.

### 10.1. Lodging a rule 9.4 report on the Participant Portal

As a data holder and/or an accredited data recipient, you can start, edit and submit a rule 9.4 report on the Participant Portal by following the below steps:

#### 10.1.1. Start and submit a rule 9.4 report

1. As a primary business contact, authorised business contact, primary IT contact or an authorised IT contact, log in to the Participant Portal at <https://portal.cdr.gov.au> and select **Organisation** from the top navigation menu, then **Reports** from the left side navigation pane.



**Organisation**

Organisation A

Hi Emily  
you're acting as **Primary Business Contact** for Organisation A.

Explore this section

- Legal entity
- [Update addresses](#)
- [User list](#)
- [Change request](#)
- [Agreements](#)
- [Reports](#)

**Legal entity details**

Legal entity name  
Organisation A

Legal entity type  
—

- Based on your participation type and sector, you will be presented with a summary view of your rule 9.4 reporting obligation for the current reporting period and the next reporting period.

**Reporting overview**

**Data holder reports** [View all data holder banking reports](#)

**Banking sector**

Year	Reporting Period ↑	Status	Due Date	Date Submitted	Submitted By	Actions
2022	1 January - 30 June	Not Started	30/07/2022			<a href="#">Start</a> <a href="#">Download</a>
2021	1 July - 31 December	Not Started	30/01/2022			<a href="#">Start</a> <a href="#">Download</a>

- Select **Start** from the Actions column.
- Proceed to fill in each of the sections as shown below.

**Summary of CDR complaint data**

**Summary** Requests Refusals Comments Review Acknowledgement

**Drafting guidance for responding to this section**

As stated in the Explanatory Statement for Competition and Consumer (Consumer Data Right) Amendment Rules (No.1) 2020, the ACCC accepts that complaints resolved within 5 business days are typically not recorded under existing internal dispute resolution processes. Where that is the case, the ACCC considers there is no requirement for these types of complaints to be recorded or reported under the CDR Rules, although CDR participants may choose to do so.

- Upon submission, a confirmation will be shown.

## Submitted

You have successfully submitted the data holder rule 9.4 report. We may follow up to discuss details of this report or to request additional information.

Your report reference number is RR001500.

[Back to Reports](#)

### 10.1.2. Edit a rule 9.4 report

A primary business contact, authorised business contact, primary IT contact or an authorised IT contact can edit a draft report any time before the reporting cut-off date.

1. Log in to the Participant Portal at <https://portal.cdr.gov.au> and select **Organisation** from the top navigation menu, then **Reports** from the left side navigation pane.
2. Select **Edit** from the Actions column.

## Reporting overview

### Data holder reports

[View all data holder banking reports](#)

#### Banking sector

Year ↑	Reporting Period	Status	Due Date	Date Submitted	Submitted By	Actions
2021	1 July - 31 December	Draft	30/01/2022			<a href="#">Edit</a> <a href="#">Download</a>
2022	1 January - 30 June	Not Started	30/07/2022			<a href="#">Start</a> <a href="#">Download</a>

3. Proceed to edit or complete the form.

Consumer Data Right
Home
Applications
Organisation
Reports
Profile
Swap.org
Sign out

## Data holder report

Participation details  
Data holder, Banking sector

Reporting period      Year  
1 July - 31 December      2021

Summary ✓
Requests ✓
Refusals
Comments
Review
Acknowledgement

### Refusals to disclose

**Drafting guidance**  
A reference to a 'refusal' to disclose CDR data is intended to cover all refusals to disclose CDR data. For the avoidance of doubt, circumstances where the data holder must report on the number of refusals to disclose CDR data include:

- refusals for reasons specified in the data standards (for example, a refusal to disclose CDR data because the number of requests received exceeded the service level thresholds in the Non-Functional Requirements section)

4. Upon submission, a confirmation will be shown.

### 10.1.3. Download a rule 9.4 report

You can download a PDF copy of the report at any time by selecting **Download** from the Actions column and follow the prompts.

## Reporting overview

### Data holder reports

[View all data holder banking reports](#)

#### Banking sector

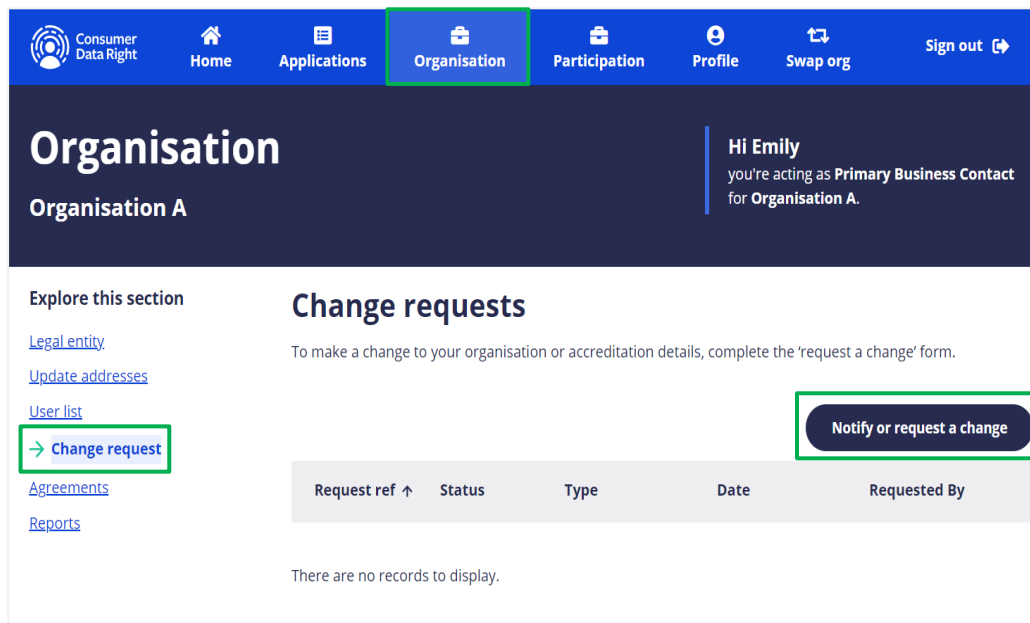
Year ↑	Reporting Period	Status	Due Date	Date Submitted	Submitted By	Actions
2021	1 July - 31 December	Draft	30/01/2022			<a href="#">Edit</a> <a href="#">Download</a>
2022	1 January - 30 June	Not Started	30/07/2022			<a href="#">Start</a> <a href="#">Download</a>

### 10.2. Amend a submitted report

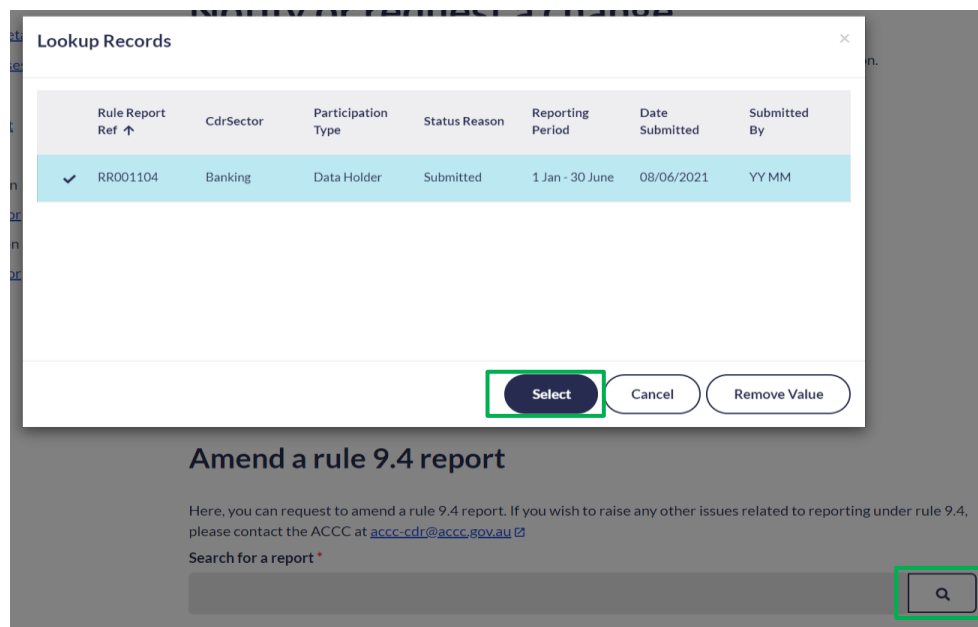
A primary business contact can raise a change request to amend a submitted report before the due date.

To raise a change request:

1. Log in to the Participant Portal at <https://portal.cdr.gov.au> and select **Organisation** from the top navigation menu.
2. Select **Change request** from the left side navigation pane and select **Notify or request a change**.



3. Under the **Change type**, select **Amend a rule 9.4 report** option.
4. You can search for a submitted report by launching the lookup modal. Select a report that needs to be amended and then click **Select** to confirm.



5. Complete the rest of the form and select **Submit request** to complete the process.

- When the change request is approved, the relevant report will be set to the **Draft** status to allow editing.

## 11. Maintain Conformance Test Suite (CTS) details

To be able to conduct conformance testing via the CTS, the technical details of your target testing environment must be provided to the ACCC. Authorised users are able to enrol in CTS, submit CTS certificate request, CTS authentication details and CTS endpoints from the Conformance Test Suite (CTS) details page in the Participant Portal.

### 11.1. View CTS details

To view Conformance Test Suite (CTS) details page:

- As a primary business contact, primary IT or an authorised IT contact, log in to the Participant Portal at <https://portal.cdr.gov.au> and select **Participation** from the top navigation menu.
- Select to **View** an applicable **Brand**. and then select to **View** the relevant **Brand participation**.

Consumer Data Right

Home Applications Organisation **Participation** Profile Swap org Sign out

## Participation

Organisation A

Hi Emily  
you're acting as Primary Business Contact for Organisation A.

Explore this section

→ Brands

### Brands

Add new brand

Brand ↑	Brand type	Status	Actions
Brand A	Primary	Active	<a href="#">View</a> <a href="#">Edit</a>

## Brand participation

Add participation

Participation type ↑	Organisation type	CDR sector	Status	Actions
Data Holder	Business Name	Banking	New	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>

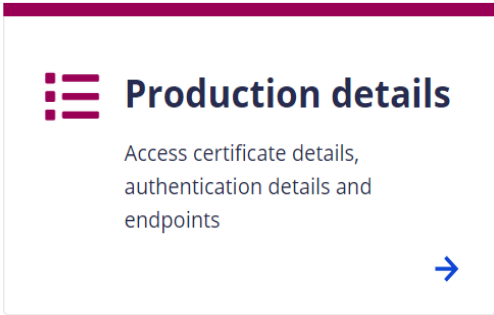
**Note:** For data recipients, you will need to further select a software product.

## Brand software products

Add software product

Product ref	Name ↑	Status	Approval date	Actions
<a href="#">DRSP001033</a>	Pumpkin Hunt	Inactive		<a href="#">View</a>
<a href="#">DRSP001032</a>	Snackos	Inactive		<a href="#">View</a>

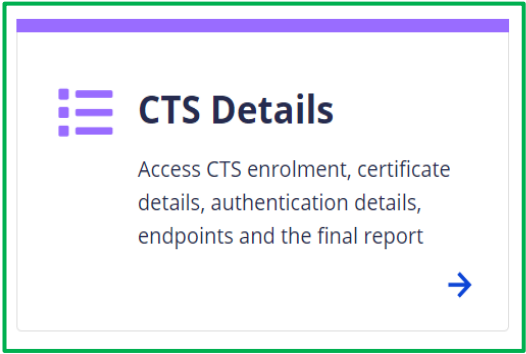
### 3. Select the **CTS Details** tile to access CTS information



**Production details**

Access certificate details, authentication details and endpoints

[→](#)



**CTS Details**

Access CTS enrolment, certificate details, authentication details, endpoints and the final report

[→](#)

## 11.2. Submit CTS Enrolment

The CTS enrolment form is available to the primary business contact, primary and authorised IT contact and the authorised CTS tester to complete.

### 1. From the **CTS Details** page, select **Start CTS Enrolment**.

## Conformance Testing Suite (CTS) details

Access CTS enrolment, certificate details, authentication details, endpoints and the final report for Brand A

### CTS Enrolment

Start CTS enrolment

Participation Type ↑	Status	Date submitted	Submitted by	Actions
There are no records to display				

2. The **Before you start** page displays information on what to expect and what information is required to complete CTS testing. Please read carefully.
3. Select **Start** to commence enrolment.
4. In the **Contact details** section, you can create new CTS testers or edit and remove existing CTS tester as required.
5. To create a new CTS tester, select **Add new CTS contact** and provide the necessary information.

### CTS tester contact details

The people you add as CTS testers here will be finalised once this CTS enrolment form is submitted.

Add new CTS contact

First Name ↑	Last Name	Email	Actions
John	Lucas	john.lucas@organisationa.com	<a href="#">Edit</a> <a href="#">Remove</a>

6. Select **Save and continue** to proceed to the next section.
7. In the **Test scenarios** section, provide details in relation to your brand or software product, these details determine the relevant test scenarios that will be allocated.

#### ! Note

More information can be found by clicking on the hyperlinks provided.

8. Complete the details and select **Save and continue**.
  - Data Holders proceed to Step 9 (Ciphers section)
  - Data Recipients proceed to Step 12 (Review section)
9. In the **Ciphers** section, indicate which Cipher(s) your brand support and select **Save and continue** to proceed.
10. Complete the relevant details relating to your test data preparation and select **Save and continue** to proceed.
11. Complete the **Network configuration** details relevant to your brand and select **Save and continue** to proceed.
12. The Review tab provides a view of all the details you have populated. You can view the details by clicking on the dropdown. Once you have completed reviewing the details, select **Continue**.
13. To submit your CTS enrolment form, you must review and accept the details in the acknowledgment page, and then select **Submit CTS enrolment form**.

14. Upon submission, your CTS conformance ID will be displayed on the submission confirmation page. Additionally, you will also receive this confirmation by email.

## Submitted

Your have successfully submitted your CTS enrolment form!

Your CTS enrolment reference number is CTS101062.



### Please Note.

This is your **Conformance ID: c8c3c749-6e04-41a6-a025-10d71f001e3a**. You will need it to access the CTS. Next, you will have to request a certificate for our test environment and apply it to your brand. Instructions on how to request a certificate are in section 7.4 of your CDR on-boarding guide.

### ! Note

The auto-generated email will contain the details to help you complete CTS next steps, along with your Conformance ID, CTS Guidance Documentation and CTS Connection Datasheet.

## 11.3. Maintain CTS certificates

Primary business contact, primary IT contact and authorised IT contact of a data holder and data recipient can maintain their CTS certificates on the Participant Portal.

### 11.3.1. Request a CTS certificate

1. Select **Request a CTS certificate**.

## CTS Certificates

Request a CTS certificate

Certificate ref ↑	Common name	Status	Expiry date	Actions
There are no certificates to display				

2. Proceed to fill in the mandatory fields.



## Request a CTS certificate

Required fields are marked with a red asterisk ( \* ) and must be filled in to save.

CTS Certificate type \*

CTS Common name \*

CTS Certificate signing request \*

CTS Email \*

☐ I have read and agree to the certificate management policies \*

[← Back to CTS details](#)

[Request CTS certificate](#)

3. Upon submission, a CTS certificate status of **‘submitted’** will be displayed.

### 11.3.2. Receive CTS certificate outcomes

Data recipients and data holders will receive notifications on the outcome for the CTS certificate request. An email of the outcome will be sent to the participant with either an approval or rejection with next steps for action. The outcome will also be visible in the **‘status’** field on the Participant Portal as shown below:

CTS Certificates				
<a href="#">Request a CTS certificate</a>				
Certificate ref ↑	Common name	Status	Expiry date	Actions
<a href="#">CTSCE001076</a>	CTS-TA3-CLIENT9	Rejected		<a href="#">View</a>
<a href="#">CTSCE001079</a>	CTS-TA3-REJ-CLIENT	Rejected		<a href="#">View</a>
<a href="#">CTSCE001083</a>	CTS-TA3-VAL-SERVER	Valid	26/05/2021	<a href="#">View</a>

< 1 2 >

### 11.3.3. Download CTS certificate outcomes

Data holders and data recipients can download current and historical CTS certificates from the Participant Portal by selecting **Download** from the Actions column.

CTS Certificates				
<a href="#">Request a CTS certificate</a>				
Certificate ref ↑	Common name	Status	Expiry date	Actions
<a href="#">CTSCE001016</a>	19128uattest.com	Valid	14/11/2021	<a href="#">Download</a> <a href="#">Revoke</a> <a href="#">View</a>

### 11.3.4. Revoke a CTS certificate

Primary business contact, primary IT contact and authorised IT contact of a data holder and data recipient can revoke an existing valid CTS certificate by following the below steps:

1. Select the **Revoke** action against a valid CTS certificate.

CTS Certificates				
<a href="#">Request a CTS certificate</a>				
Certificate ref ↑	Common name	Status	Expiry date	Actions
CTSCE001003	Common Name test	Valid		<a href="#">Revoke</a> <a href="#">View</a>

2. In the 'Are you sure you want to revoke the certificate' field, select the **Yes** radio button.

CTS Issue date


---

CTS Expiry date

---

Are you sure you want to revoke the certificate? \*


☐ No ☒ Yes

 You are about to revoke this certificate. This action cannot be undone.

3. Select an appropriate revoke reason from the **CTS Revoke Reason** drop-down list and click **Revoke CTS certificate** button to submit the form.

CTS Revoke reason \*

Key compromised

 **Key compromised**  
The location where the private key associated with the certificate has been compromised and is in the possession of an unauthorised individual.

Explain why you are revoking this certificate \*

[← Back to CTS details](#) [Revoke CTS certificate](#)

### 11.3.5. Renew a CTS certificate

Primary business contact, primary IT contact and authorised IT contact of a data holder and data recipient can renew an existing CTS certificate within 30 days of its expiry by:

1. Select the **Renew** action against a valid CTS certificate.

CTS Certificates				Request a CTS certificate
Certificate ref ↑	Common name	Status	Expiry date	Actions
CTSCE001014	Test CTS	Submitted		<a href="#">View</a>
CTSCE001018	harshactstesting89	Failed		<a href="#">View</a>
CTSCE001020	harshactstesting89.com	Valid	07/08/2021	<a href="#">View</a> <a href="#">Download</a> <a href="#">Renew</a> <a href="#">Revoke</a>
CTSCE001023	testDRRevoke.com	Requested		<a href="#">View</a>

2. Complete the certificate renewal form and select **Renew CTS certificate** to submit the form.
3. You will be notified via email on the outcome of the renewal request

CTS Certificate type

Client

CTS Common name

harshaDHCTScertificatetest

CTS Email \*

hkkh@gmail.com

CTS Certificate signing request \*

test

CTS Issue date

CTS Expiry date

07/08/2021

☐

I have read and agree to the certificate management policies \*

← Back

Renew CTS certificate

### ! Note

When the certificate expiry date has lapsed, the renewal button will no longer be available. You will need to request a new certificate using the “Request a certificate” process.

## 11.4. Maintain CTS authentication details

When the CTS enrolment form has been submitted, the Participant Portal automatically creates a blank CTS Authentication details entry, as shown below:

CTS Authentication details			
Name ↑	Status	Purpose	Actions
CTSAD001046 : 001301 - CTS Authentication Detail	Incomplete	DH Authentication	<a href="#">Edit</a> <a href="#">View</a>

Primary business contact, primary or authorised IT contact and authorised CTS tester can edit or view CTS authentication details in the **CTS details** page.

### 11.4.1. Submit CTS authentication details

1. Select the **Edit** action.

CTS Authentication details			
Name ↑	Status	Purpose	Actions
CTSAD001046 : 001301 - CTS Authentication Detail	Incomplete	DH Authentication	<a href="#">Edit</a> <a href="#">View</a>

2. Enter **CTS JWKS endpoint** and select **Submit** to finish the process.

## CTS Authentication

CTS Authentication name

CTSAD001046 : 001301 - CTS Authentication Detail

CTS Authentication purpose

DH Authentication

CTS JWKS endpoint \*

Status

Incomplete

← Back to CTS details

Submit

**! Note**

Upon submission, the record is made active and you will not be able to edit this entry. If you need to edit CTS authentication details, please contact the ACCC via [Jira Customer Portal](#).

### 11.4.2. View CTS authentication details

To view CTS authentication details, select the **View** action as shown below.

## CTS Authentication details

Name ↑	Status	Purpose	Actions
CTSAD001046 : 001301 - CTS Authentication Detail	Incomplete	DH Authentication	<a href="#">Edit</a> <a href="#">View</a>

### 11.5.Maintain CTS endpoints

When the CTS enrolment form has been submitted, the Participant Portal automatically creates a blank CTS Authentication details entry.

## CTS Endpoints

Name ↑	Status	Actions
CTSDHEP001026 : 001301 - CTS Endpoint	Incomplete	<a href="#">Edit</a> <a href="#">View</a>

Primary business contact, primary or authorised IT contact and authorised CTS tester can edit or view CTS endpoints details in the **CTS details** page.

#### 11.5.1. Submit CTS endpoints

1. To submit CTS endpoint, select the **Edit** action.

## CTS Endpoints

Name ↑	Status	Actions
CTSDHEP001026 : 001301 - CTS Endpoint	Incomplete	<a href="#">Edit</a> <a href="#">View</a>

2. Fill in mandatory details as required and select **Submit**.

### ! Note

Upon submission, the record is made active and you will not be able to edit this entry. If you need to edit CTS endpoint details, please contact the ACCC via [Jira Customer Portal](#).

## 12. Getting help

If you have any questions about accessing and using the CDR Participant Portal, please contact us via the Jira Support Portal at [Jira Customer Portal](#).

Alternatively, you can contact us via email at [CDRTechnicalOperations@accc.gov.au](mailto:CDRTechnicalOperations@accc.gov.au).



## Appendix: User roles and permissions

The Participant Portal supports multiple user roles with different permission profiles which allow participants to effectively manage their entity's information. Multiple users in an organisation can be assigned to each role except for the authorised CTS tester role.

Role	Overview	User actions	Legal entity	Accredited data recipient	Data holder
<b>Primary business contact</b>	Administration role for the participant's activities on the Participant Portal. At least one primary business contact is required and is the first role assigned during the account creation process. The initial primary business contact must be a person who is listed on the organisation's business record	<ul style="list-style-type: none"> <li>manage own details</li> <li>view a list of users</li> <li>invite new users</li> <li>assign and modify a user's role</li> <li>modify details of current users</li> <li>remove a user</li> </ul>	<ul style="list-style-type: none"> <li>view and update the organisation's details</li> <li>view organisation files and agreements</li> <li>view, create, update and remove a brand</li> <li>view, create, and update a software product</li> <li>update the software product authentication details</li> </ul>	<ul style="list-style-type: none"> <li>start, view, update, submit, and withdraw an application for the legal entity</li> <li>notify a sponsorship arrangement</li> <li>manage on-boarding</li> <li>view, create, update and remove a brand</li> <li>update, test, and commit brand authentication details</li> <li>manage brand certificate</li> <li>view, create, update, and remove a software product</li> <li>update, test, and commit software product authentication details</li> </ul>	<ul style="list-style-type: none"> <li>initiate, view, and submit registration</li> <li>start, update and submit a rule 9.4 report</li> <li>submit change request to amend a rule 9.4 report</li> <li>submit CTS enrolment form</li> <li>edit and view CTS authentication details and CTS endpoint details</li> <li>manage CTS certificates</li> </ul>

				<ul style="list-style-type: none"> <li>• start, update and submit a rule 9.4 report</li> <li>• submit a change request to: <ul style="list-style-type: none"> <li>○ amend a submitted application</li> <li>○ withdraw a submitted application</li> <li>○ surrender accreditation</li> <li>○ amend a rule 9.4 report</li> </ul> </li> <li>• submit CTS enrolment form</li> <li>• edit and view CTS authentication details and CTS endpoint details</li> <li>• manage CTS certificates</li> <li>• CDR Representative Arrangement Notification</li> </ul>	
<b>Authorised business contact</b>	Performs a supporting administrator role for the legal entity's activities on the Participant Portal	<ul style="list-style-type: none"> <li>• manage own details</li> <li>• view a list of users</li> </ul>	<ul style="list-style-type: none"> <li>• view and update selected organisational details</li> </ul>	<ul style="list-style-type: none"> <li>• view and update an application for the legal entity</li> <li>• submit a change request to:</li> </ul>	<ul style="list-style-type: none"> <li>• initiate, view, and submit registration</li> </ul>

			<ul style="list-style-type: none"> <li>view organisation files and agreements</li> </ul>	<ul style="list-style-type: none"> <li>amend a submitted application</li> <li>withdraw a submitted application</li> <li>surrender accreditation</li> </ul>	<ul style="list-style-type: none"> <li>start, update and submit a rule 9.4 report</li> <li>submit CTS enrolment form</li> <li>edit and view CTS authentication details and CTS endpoint details</li> <li>manage CTS certificates</li> </ul>
			<ul style="list-style-type: none"> <li>view, create, update and remove a brand</li> <li>start, update and submit a rule 9.4 report</li> <li>submit CTS enrolment form</li> <li>edit and view CTS authentication details and CTS endpoint details</li> <li>manage CTS certificates</li> </ul>		
<b>Primary IT contact</b>	A primary IT contact performs an IT administrator role for the legal entity's activities on the Participant Portal.	<ul style="list-style-type: none"> <li>manage own details</li> <li>view a list of users</li> </ul>	<ul style="list-style-type: none"> <li>view and update selected organisational details</li> <li>view organisation files and agreements</li> <li>update the software product</li> </ul>	<ul style="list-style-type: none"> <li>view and update an application for the legal entity</li> <li>manage on-boarding</li> <li>view, create, update and remove a brand</li> <li>update, test, and commit brand authentication details</li> </ul>	<ul style="list-style-type: none"> <li>view registration</li> <li>start, update and submit a rule 9.4 report</li> <li>submit CTS enrolment form</li> <li>edit and view CTS authentication</li> </ul>

			authentication details	<ul style="list-style-type: none"><li>• manage brand certificate</li><li>• view, create, update, and remove a software product</li><li>• update, test, and commit software product authentication details</li><li>• submit new details to your software products' endpoints</li><li>• start, update and submit a rule 9.4 report</li><li>• submit CTS enrolment form</li><li>• edit and view CTS authentication details and CTS endpoint details</li><li>• manage CTS certificates</li></ul>	<ul style="list-style-type: none"><li>• details and CTS endpoint details</li><li>• manage CTS certificates</li></ul>
Authorised IT contact	An authorised IT contact is a support role for the primary IT contact	<ul style="list-style-type: none"><li>• manage own details</li><li>• view a list of users</li></ul>	<ul style="list-style-type: none"><li>• view and update selected organisational details</li><li>• view organisation files and agreements</li></ul>	<ul style="list-style-type: none"><li>• view and update an application for the legal entity</li><li>• update on-boarding details</li><li>• view, create, update and remove a brand</li></ul>	<ul style="list-style-type: none"><li>• view registration</li><li>• start, update and submit a rule 9.4 report</li><li>• submit CTS enrolment form</li></ul>

		<ul style="list-style-type: none"> <li>• update the software product authentication details</li> </ul>	<ul style="list-style-type: none"> <li>• update, test, and commit brand authentication details</li> <li>• manage brand certificate</li> <li>• view, create, update, and remove a software product</li> <li>• update, test, and commit software product authentication details</li> <li>• submit new details to your software products' endpoints</li> <li>• start, update and submit a rule 9.4 report</li> <li>• submit CTS enrolment form</li> <li>• edit and view CTS authentication details and CTS endpoint details</li> <li>• manage CTS certificates</li> </ul>	<ul style="list-style-type: none"> <li>• edit and view CTS authentication details and CTS endpoint details</li> <li>• manage CTS certificates</li> </ul>
<b>Legal authority contact</b>	<ul style="list-style-type: none"> <li>• manage own details</li> <li>• view a list of users</li> </ul>	<ul style="list-style-type: none"> <li>• view organisational details</li> </ul>	<ul style="list-style-type: none"> <li>• notify a sponsorship arrangement</li> <li>• view an application for the legal entity</li> </ul>	<ul style="list-style-type: none"> <li>• view registration</li> </ul>

		<ul style="list-style-type: none"> <li>• view organisation files and agreements</li> <li>• submit agreements</li> </ul>	<ul style="list-style-type: none"> <li>• view a brand</li> <li>• view a software product</li> <li>• CDR Representative Arrangement Notification</li> </ul>		
<b>Authorised CTS tester</b>	The authorised CTS tester role provides access to the CTS to conduct technical testing on brand and software products.	<ul style="list-style-type: none"> <li>• manage own details</li> </ul>	<ul style="list-style-type: none"> <li>• view organisational details</li> </ul>	<ul style="list-style-type: none"> <li>• no access to production information</li> <li>• submit CTS enrolment form</li> <li>• edit and view CTS authentication details and CTS endpoint details</li> <li>• view CTS certificates</li> </ul>	<ul style="list-style-type: none"> <li>• no access to production information</li> <li>• submit CTS enrolment form</li> <li>• edit and view CTS authentication details and CTS endpoint details</li> <li>• view CTS certificates</li> </ul>