



Australian Government



**Consumer
Data Right**

Participant Portal User Guide

Register and Accreditation Application Platform

Table of Contents

1	Glossary	5
2	About the Participant Portal	8
2.1	Overview	8
2.2	Services available in the Participant Portal.....	8
3	Creating a Participant Portal account	9
3.1	Who can create a Participant Portal account?	9
3.2	Information needed to create a Participant Portal account	9
3.3	Complete the request to create an account in the Participant Portal	10
3.4	Activate your Participant Portal account	17
4	Logging into the Participant Portal.....	19
5	Managing users in the Participant Portal	20
5.1	Inviting participants	20
5.2	Users across multiple legal entities	21
5.3	Modifying a user's access	22
5.4	Removing a user's access	23
6	Data holders	25
6.1	Complete data holder registration	25
6.2	Reciprocal data holder obligations.....	26
7	Data recipients	27
7.1	Accreditation levels	27
7.1.1	Unrestricted	27
7.1.2	Sponsored	27
7.2	Accreditation application.....	27
7.2.1	Start an accreditation application	27
7.2.2	Edit your application	28
7.2.3	Finalise and submit your application	29
7.2.4	Withdraw a draft application	30
7.2.5	Withdraw a submitted application	30
7.2.6	Incomplete applications	31

7.3	Other change requests	31
7.4	Surrender accreditation	32
7.4.1	Submit a request to surrender accreditation.....	32
7.4.2	Withdraw your request to surrender accreditation.....	33
8	Post accreditation or registration	35
9	Manage organisation details.....	37
9.1	Maintain organisation details	37
9.2	CDR representative arrangement notification	38
9.2.1	Notify a new CDR representative arrangement	38
9.2.2	Edit or end a representative arrangement.....	39
9.3	CDR sponsorship arrangement notification	39
9.3.1	Notify a new sponsorship arrangement.....	40
9.3.2	Notify the end date of a sponsorship arrangement.....	40
9.3.3	View sponsorship arrangements	40
10	Manage participation details.....	42
10.1	Maintain brand details	42
10.2	Maintain brand participation details.....	46
10.3	Maintain software product details	47
10.3.1	Adding new software products.....	47
10.3.2	Maintaining existing software products	48
10.4	Maintain PKI certificates.....	55
10.4.1	Request a production certificate	56
10.4.2	Request a CTS certificate.....	57
10.4.3	Revoke a production certificate	57
10.4.4	Revoke a CTS certificate.....	58
10.4.5	Renew a production certificate.....	58
10.4.6	Renew a CTS certificate	59
10.5	Maintain authentication details	59
11	Maintain Conformance Test Suite (CTS) details	61
11.1	View CTS details	61
11.2	Submit CTS Enrolment	62

11.3	Maintain CTS certificates	64
11.3.1	Request a CTS certificate.....	64
11.3.1.1	Data Holder Server CTS Certificate type default screen	65
11.3.1.2	Data Recipient Client CTS Certificate type default screen.....	66
11.3.2	Receive CTS certificate	66
11.3.2.1	Successful submission	66
11.3.2.2	Unsuccessful submission	69
11.3.3	Download CTS certificate.....	70
11.3.4	Revoke a CTS certificate.....	70
11.3.5	Renew a CTS certificate	72
11.4	Maintain CTS authentication details	75
11.4.1	Submit CTS authentication details	76
11.4.2	View CTS authentication details.....	77
11.5	Maintain CTS endpoints	78
11.5.1	Submit CTS endpoints	78
12	Rule 9.4 reporting	79
12.1	Lodging a rule 9.4 report on the Participant Portal	79
12.1.1	Start and submit a rule 9.4 report	79
12.1.2	Edit a rule 9.4 report.....	81
12.1.3	Download a rule 9.4 report.....	81
12.2	Amend a submitted report	82
13	Getting help	84
14	Appendix: User roles and permissions	85
15	Non-Prod Participant Portal Access	93
16	Schedule 1 reporting	99
16.1	Lodging a Schedule 1 report on the Participant Portal.....	99
16.1.1	Start and submit a Schedule 1 report.....	99
16.1.2	View a submitted Schedule 1 Historical report	100
16.1.3	Edit a submitted Schedule 1 Historical report	101

1 Glossary

Term	Definition
Accredited person	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.
Accreditor	Data Recipient Accreditor - currently the Australian Competition and Consumer Commission.
ACCC	Australian Competition and Consumer Commission
ADI	Authorised deposit-taking institution
ADR	Accredited data recipient
AFCA	Australian Financial Complaints Authority
Affiliate	A person accredited to the sponsored level and in a sponsorship arrangement is known as an affiliate of its sponsor. A person does not need to have sponsored accreditation to enter into a sponsorship arrangement as an affiliate, but will need it to make the consumer data requests.
Applicant	A person who submits an application for accreditation as an accredited person.

Associated person	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> .
CDR	Consumer Data Right
CDR Participant Portal	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.
CDR Register	Register of Accredited Persons
CDR Rules	<i>Competition and Consumer (Consumer Data Right) Rules 2020</i>
Data holder	A holder of CDR data.
Participant	A data holder or an accredited data recipient participating in the CDR regime.
Sponsor	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.

Sponsored Accredited Data Recipient (Sponsored ADR)	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.
Sponsorship Arrangement	A sponsorship arrangement is a written contract between a person with unrestricted accreditation (the <i>sponsor</i>) and another person (the <i>affiliate</i>).
Unrestricted Accredited Data Recipient (Unrestricted ADR)	A Data Recipient who is able to obtain consent from consumers and collect data from data holders without any restrictions for all designated sectors.

2 About the Participant Portal

2.1 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 <https://www.cdr.gov.au/>.



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.

2.2 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.

3 Creating a Participant Portal account

3.1 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) or Australian Business register record (ABR), or the equivalent foreign business record if the organisation is a foreign entity. For example, a director, company secretary or an authorised contact listed on the organisation's business record.

3.2 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 (for Australian entities). You can use the search box in the request form to match your ABN or ACN with the corresponding ABR/ASIC record in order to progress your account creation in the Participant Portal . For non-Australian entities you will need your relevant business registration number.
- Your Personal details - Only an authorised contact or office holder of the organisation can make a request to create a CDR Participant Portal account. An authorised contact or office holder is a director, company secretary, associate or a person listed on the organisation's Australian Business Register / ASIC record.
Please ensure that you are an authorised contact or office holder for your organisation and your personal details entered in the form match your personal details as recorded in your organisation's Australian Business Register record or Australian Securities & Investments Commission record.
If these authorised contacts are out of date, please update your business details on the relevant business register. If your organisation's authorised contacts have recently been updated on the ASIC/ABR business register, it may take up to 4 weeks for the changes to be reflected in our business database before we can verify your organisation's details.
- Organisation address - The registered address for service must be a physical address associated with your organisation, it cannot be a PO Box. If the service of notice address in your organisation's Australian Business Register or ASIC record is a PO Box, please update it to a physical address.
If your organisation's address for service has recently been updated with the Australian Business Register or ASIC record, it may take up to 4 weeks for the changes to be reflected in our business database before we can verify your organisation's details. Your organisation's registered business address (e.g. principal place of business) may be the same as your registered address for service.
- The electronic address for service for your organisation (i.e. email).

- Whether your organisation is a foreign entity. If your organisation is a foreign entity, you will be required to have a local agent and provide their electronic and physical addresses for service.

Initial primary business contact details

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

3.3 Complete the request to create an account in the Participant Portal

1. To complete the request to create an account in 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

Consumer Data Right

[Contact us](#) [Resources](#) [Privacy](#) [Accessibility](#)

[Disclaimer and copyright](#)

- Complete all mandatory questions on the form (all questions are mandatory unless marked optional).
- Search by your company ABN or ACN. On clicking Next, the system will validate your details against ABN/ASIC business records to find a match. If you have provided invalid details, you will be notified with a message including the option to search again.


[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 ☒ Search ABN Confirm ABN Personal Address Submit

Australian Business Number (ABN) or Australian Company Number (ACN) *



If you have recently registered your business, your ABN or ACN may take up to 4 weeks to appear in our business database before we can verify your organisation's details. If this is the case, please try again later. For further information about creating a CDR Participant Portal account please refer to the [CDR Participant User Guide](#).

Enter your ABN or ACN and select 'Next' to confirm

[Previous](#)
[Next](#)

[Contact us](#)
[Resources](#)
[Privacy](#)
[Accessibility](#)
[Disclaimer and copyright](#)
[Terms and conditions](#)

5. Confirm the ABN/ACN details and click on Next.
6. Complete the personal details section by answering all questions and mandatory fields. On clicking Next, the system will validate your details against ABN/ASIC business records to find a match. If you have provided invalid details, you will be notified with a message including the option to update details again.


[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 ✓	Search ABN ✓	Confirm ABN ✓	Personal	Address	Submit
---------	--------------	---------------	----------	---------	--------

Personal details



Only an authorised contact or office holder of the organisation can make a request to create a CDR Participant Portal account. An authorised contact is a person listed on your organisation's Australian Business Register record (ie ABN), and an office holder is a director or company secretary listed on the organisation's Australian Business Register record (under "Associates") or on your organisation's Australian Securities & Investments Commission record (ie ACN). If these authorised contacts or office holders are out of date, please update your business details on the relevant business record.

If your organisation's authorised contacts or office holders have recently been updated on the relevant business record, it may take up to 4 weeks for the changes to be reflected in our business database and before we can verify your organisation's details.

First name *

Last name *

Contact details

Email address *

Email confirmation *

Primary mobile phone number *

Enter the primary mobile number in international format, such as +61 412 345 678

Secondary phone number (optional)

Enter the secondary number in international format, such as +61 412 345 678

[Previous](#)
[Next](#)

7. Under the search address section, complete the address details for each field as highlighted. Once the search fields are provided, the system will match the search address fields with ASIC/ABR business records and ask you to confirm the full address if there is a match. If you have provided invalid details, you will be notified with a message including the option to update the address details again.


[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 ✓ Search ABN ✓ Confirm ABN ✓ Personal ✓ Address Submit

Organisation Address



The registered address for service must match the 'Registered Office' address listed in your Australian Securities & Investments Commission record if you are an ACN holder and the 'Service of Notice Address' listed on your Australian Business Register record if you are an ABN holder. Please ensure your Registered Office address is correctly listed in the relevant business record. Please note this must be a physical address and cannot be a PO Box.

If your organisation's Registered Office address has recently been updated with the relevant business record, it may take up to 4 weeks for the changes to be reflected in our business database and before we can verify your organisation's details.

Search address

Street name *

Enter street name only. A PO Box is not allowed.

Example: If your address is 121 Exhibition Street, please enter 'Exhibition' only, no address type (street, road, avenue etc.) or number.

Suburb *

State *

Select

Postcode *

Electronic address for service


Email address *

Confirmation of Business Address

Is the registered business address the same as the registered address for service? *

☐ Yes ☐ No

8. 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 you 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 ✓ Entity ✓ Search ABN ✓ Confirm ABN ✓ Personal ✓ Address ✓ **Submit**

Confirm

Electronic Address for Service
example@email.com

PBC Mobile phone number
+61 123 456 789



☒ 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

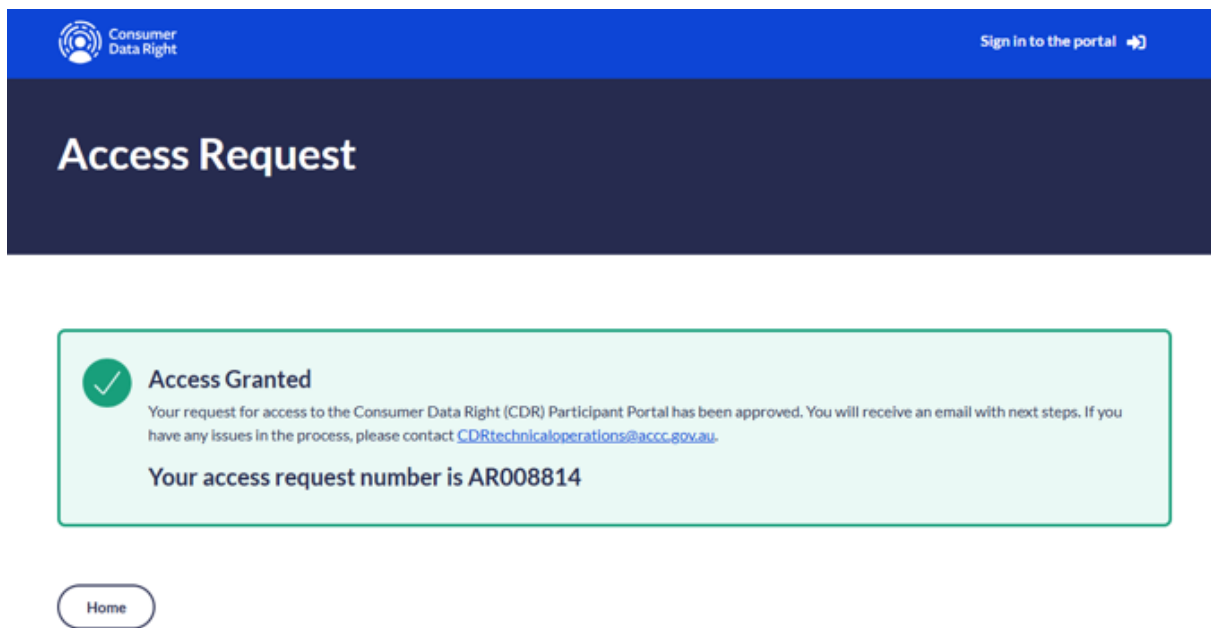
Submit

[Contact us](#)
[Resources](#)
[Privacy](#)
[Accessibility](#)

[Disclaimer and copyright](#)
[Terms and conditions](#)

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



You will also receive a confirmation email with your unique access request number with further steps.

3.4 Activate your Participant Portal account

Once your request to create an account has been approved by the CDR Team, you will receive an activation email with instructions on how to activate your account.

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

Once your account activation process is complete, you will be able to log in 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 CDR Technical Operations mailbox CDRtechnicaloperations@accc.gov.au.



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 CDR Technical Operations mailbox CDRtechnicaloperations@accc.gov.au.

Example email: Participant Portal account confirmation

Your CDR Participant Portal account has been created.

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

Step 1 - Creating a Microsoft account

If you do not have a Microsoft account used to register with the CDR Participant Portal, you can create one prior to proceeding. You can create a Microsoft account by clicking [here](#) and following the on-screen instructions or you can proceed through a password-less sign in if you are unable to create a Microsoft account. 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 CDR Participant Portal.

Step 2 - Associating your account with CDR

Please click [here](#) and sign into the CDR Participant Portal. If you are using a Microsoft Account for CDR Participant Portal access, then choose the Microsoft Account option to link your account with CDR. Otherwise, you can Sign-In with Email and use a one-time code sent to your nominated email address.

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 CDR Participant Portal Account

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

Security Token

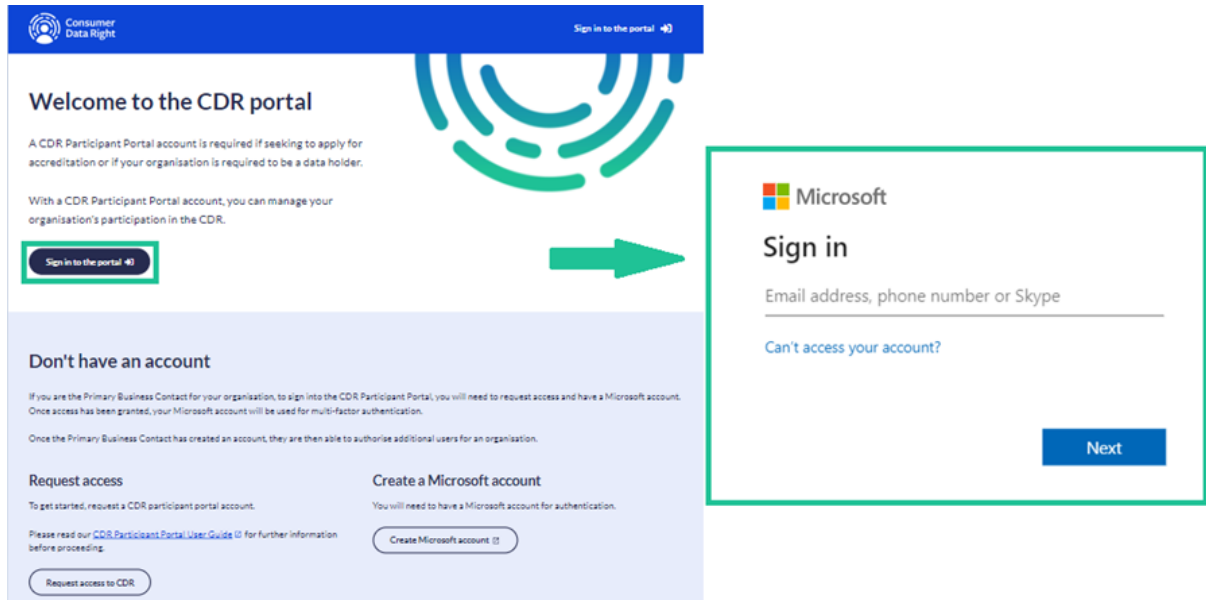
**zUrp2qUG93bvMz2b2E3MZ2W-6Jr9GAfNZ6zMvWEZP-
QoN1UHCiDMHs3Uipzdl3kd3S06lq0Dym5fBHW7QjxcZKLO-QPpCsGvWky61VuyfkGW-
uXyCi5ZxdTlx3twuLrTAuvug2EPTbxGymRUJd43XUHY5vsMkcCe0IQgGOA00-**

Step 5 - Sign in

You can now sign into your CDR Participant Portal account.

4 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. Log in to the Participant Portal using your Microsoft account login details.
3. Every time you log in, 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 log in 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 CDR Technical Operations mailbox CDRtechnicaloperations@accc.gov.au.

5 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.

5.1 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. Log in 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 screenshot displays the Participant Portal interface. On the left, the 'User list' section shows a table of existing users. A green box highlights the 'Invite user' button in the top right corner of the table. On the right, the 'Invite a new user' form is shown. A green arrow points to the 'Personal details' section of the form.

User list

Below are the users linked to your organisation.

First name	Last name	Email address	Role	Actions
Emily	Mo	emilymo@organisation.com	Primary Business Contact	Edit role Remove user
Emma	Harvey	emma.harvey@cdr.gov.au	Primary Business Contact	Edit role Remove user
John	Lynn	john.lynn@organisation.com	Authorised CTS Tester	Edit role Remove user
Wendy	Chen	wendychen@organisation.com	Primary Business Contact	Edit role Remove user
Paul	Lynd	paul.lynd@organisation.com	Primary Business Contact	Edit role Remove user
Paul	Sayed	paul.sayed@cdr.gov.au	Primary Business Contact	Edit role Remove user

Invite a new user

Complete the form below to invite a user to your organisation. Required fields are marked with a red asterisk (*). Fields marked with a red asterisk (*) must be filled in by the submitter.

Access type

Organisation: Organisation A

Role *

Choose the access your new user will need. You can change this later on.

- ☐ **Primary Business Contact**
Role to submit an application to become a CDR participant, add and manage user accounts, and perform all functions available to an ABC.
- ☐ **Authorised Business Contact**
Can complete sections of an application to become a CDR participant, request changes to the organisation's information, and update details of brands and software products.
- ☐ **Primary IT Contact**
Role to create and remove software products, add and manage technical user accounts, and perform all functions available to an ABC.
- ☐ **Authorised IT Contact**
Can view, register entity information, develop and consume APIs related to CDR, and configure technical information.
- ☐ **Legal Authority Contact**
Designates a legal entity to sign agreements and policies to participate in Consumer Data Rights.
- ☐ **Authorised CTS Tester**
Role to access the Conformance Test Suite to conduct technical testing on brand and software products.

Personal details

First name *

Last name *

Mobile number (optional)

Last name *

First name *

Contact details

Email address *

Primary mobile number *

Enter the mobile number in international format, such as +61 412 345 678.

Secondary phone number (optional)

Enter the phone number in international format, such as +61 412 345 678.

Invite

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 log in 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.

5.2 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.

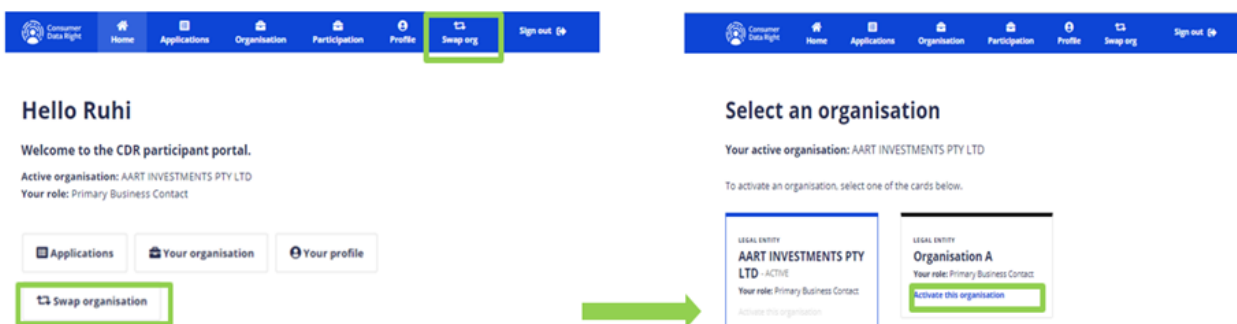


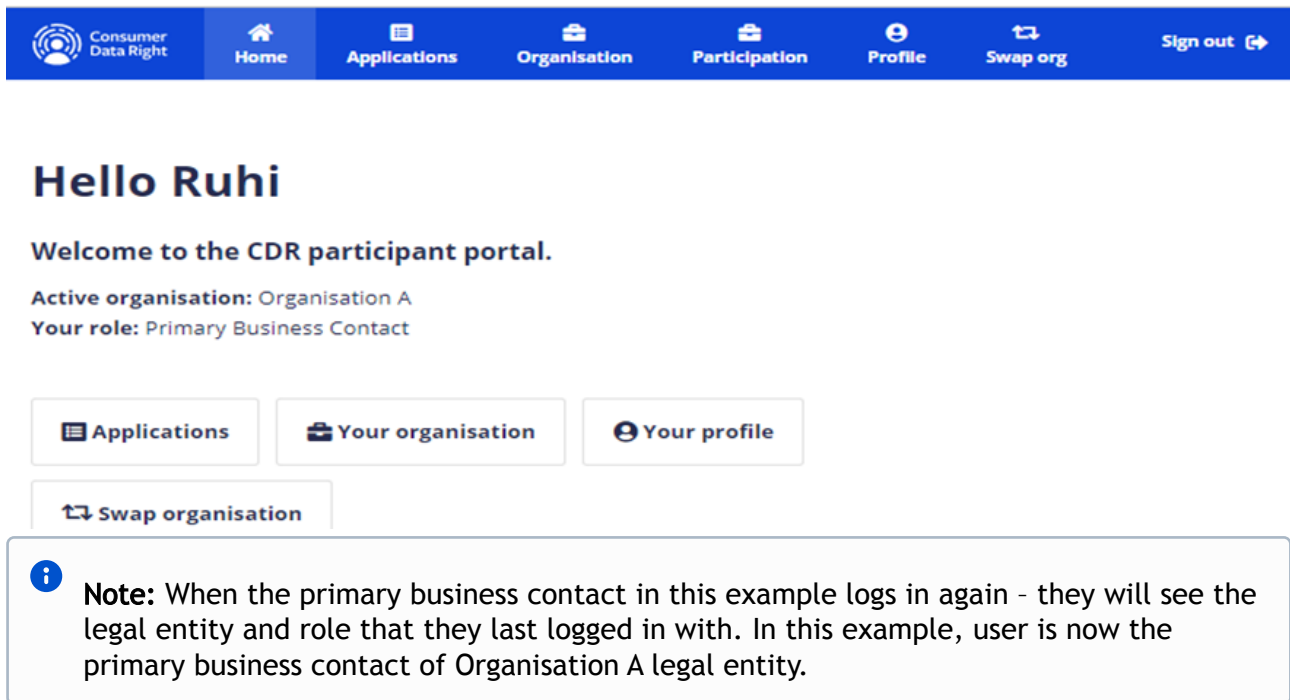
Note: If there are no multiple legal entities associated with you as a user, you will not see the **Swap organisation** menu item in the Participant Portal.

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

1. Log in 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

Applications Your organisation Your profile

Swap organisation

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.

5.3 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. Log in 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).

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
Emily	Mo	jamiella02@hotmail.com	Primary Business Contact	Edit role Remove user
Emma	Harvey	emma.harvey@accc.gov.au	Primary Business Contact	Edit role Remove user
John	Lucas	john.lucas@organisationa.com	Authorised CTS Tester	Edit role Remove user

5.4 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 Ruhl
you're acting as Primary Business Contact for Organisation A.

Explore this section
[Leave entry](#)
[Update addresses](#)
[→ User list](#)
[Change roles](#)
[Agreements](#)
[Reports](#)
[CDS Sourcebook Arrangements](#)

User list

Below are the users linked to your organisation.

Invite User

First name	Last name	Email address	Role	Actions
Emily	Mo	emilymo@normal.com	Primary Business Contact	Edit role Remove user
Emma	Harvey	emma.harvey@normal.gov.uk	Primary Business Contact	Edit role Remove user
John	Lucas	john.lucas@organisationa.com	Authorised CTS Tester	Edit role Remove user
HEWAPATHIRANAGE		mehmetheva30@gmail.com	Primary Business Contact	Edit role Remove user
Syed	syed	msyayed30@gmail.com	Primary Business Contact	Edit role Remove user
Syed	syed	msyayed30@gmail.com	Primary Business Contact	Edit role Remove user

Consumer Data Right

Home
Applications
Organisation
Participation
Profile
Swap.org
Sign out

Organisation
Organisation A

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

Explore this section
[Leave entry](#)
[Update addresses](#)
[User list](#)
[Change roles](#)
[Agreements](#)
[Reports](#)
[CDS Sourcebook Arrangements](#)

Remove User

First Name
Ruhl

Last Name
syed

Email Address
msyayed30@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

6 Data holders

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

Data holders can:

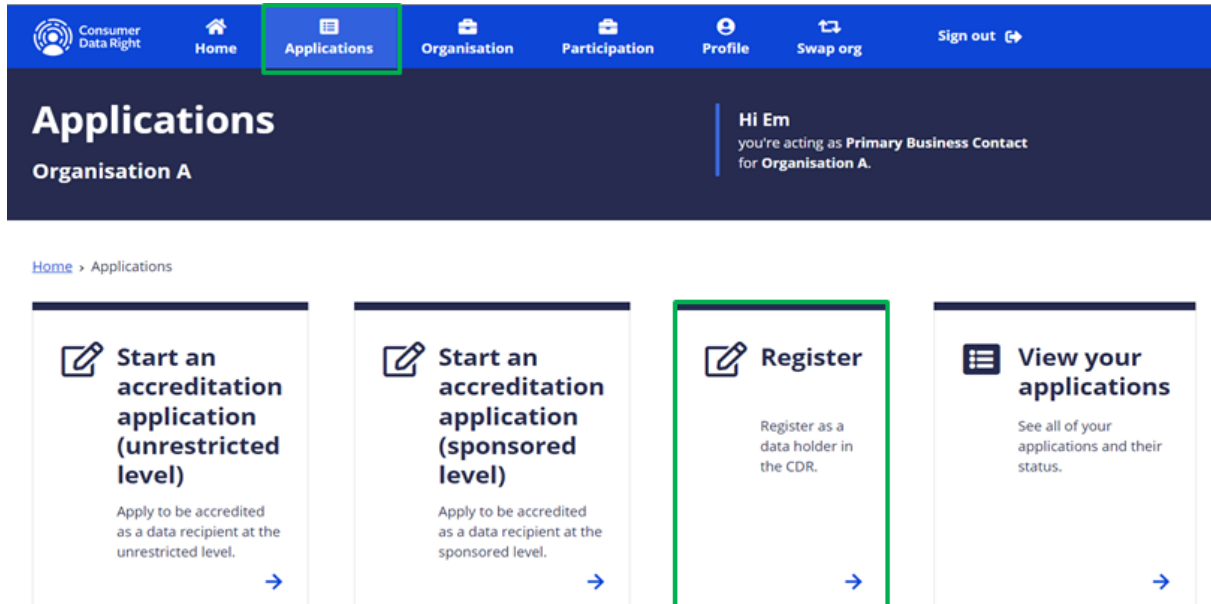
- register as a data holder in the appropriate CDR sector/s
- create, update and remove brands
- have their organisation's primary business contact invite other users with other roles within their organisation to manage their participation in CDR
- request certificates and update their brand details,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

6.1 Complete 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.

A primary business contact or authorised business contact can initiate data holder registration on the CDR Participant Portal by following the steps below:

1. Log into the Participant Portal at <https://portal.cdr.gov.au> and select the **Applications** button.
2. Click the **Register** button to open the data holder registration application form.



3. Select an appropriate CDR sector.
4. Complete the declaration and click the **Register** button to submit the form.
5. Once submitted, you will be shown a message confirming your registration.
6. 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 <https://www.cdr.gov.au/for-providers/on-boarding-for-data-holders> .

6.2 Reciprocal data holder obligations

If you are an accredited data recipient 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.

7 Data recipients

7.1 Accreditation levels

There are currently two accreditation levels: Unrestricted and Sponsored.

7.1.1 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:

1. Full unrestricted accreditation application
 - a. All applicants who are not ADIs will be required to complete the full unrestricted accreditation application.
 - b. A sample full unrestricted application form can be viewed on the Consumer Data Right website under [sample application forms](#).
2. Streamlined application
 - a. 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.
 - b. A sample streamlined application form can be viewed on the Consumer Data Right website under [sample application forms](#).

7.1.2 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.

A sample sponsored accreditation application form can be viewed on the Consumer Data Right website under [sample application forms](#).

7.2 Accreditation application

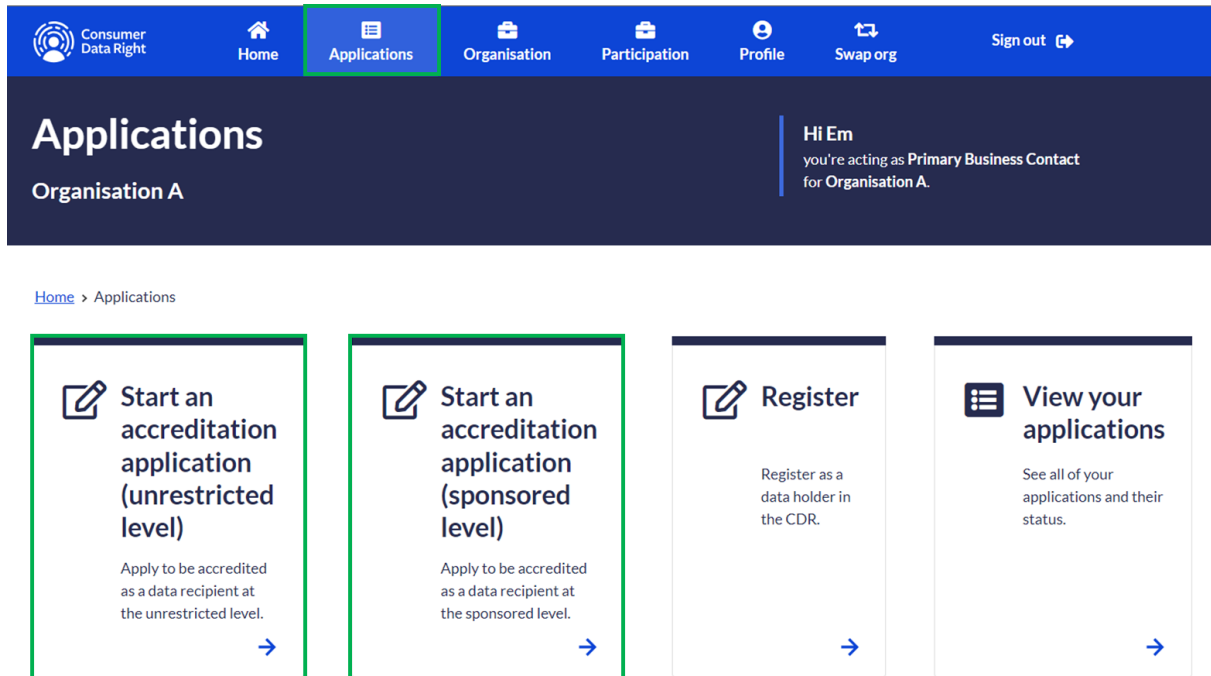
7.2.1 Start an accreditation application

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:

1. Log in to the Participant Portal at <https://portal.cdr.gov.au>. Select **Applications** from the top navigation menu.
2. Select the relevant **Start an accreditation application** tile based on the accreditation level you wish to apply for.



3. Follow the prompts to complete the application.

Once an application has been started, other users with certain roles can view and update the draft 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.
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.

7.2.2 Edit your application

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

To edit an application with a draft status:

1. Log in to the Participant Portal at <https://portal.cdr.gov.au>. Select **Applications** from the top navigation menu followed by the **View your applications** tile.
2. Find the relevant application and under the **Actions** column 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 Em
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.

WARNING:
From time to time accreditation application forms will be updated to reflect changes to the CDR Rules and/or information requirements. When an application form has been superseded, recently commenced or modified draft applications will have 2 weeks to complete and submit the form before it is no longer editable and a new form will be required.
Superseded draft applications may be viewed and/or withdrawn.

Data recipient applications - unrestricted level

Enter text to search...

Application ref ↑	Applicant	Started by	Modified on	Status	Actions
DRAP001106	Organisation A	Mahendra Hewa	12/01/2023 1:06 PM	Draft	Edit Withdraw View

7.2.3 Finalise and submit 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.

Upon submission, you will be shown a success screen confirming your application has been submitted.

You will also receive an email with your application number.

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

If you have any questions about your application, please contact us via the CDR Technical Operations mailbox CDRtechnicaloperations@accc.gov.au.

7.2.4 Withdraw a draft 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 a draft application:

1. Log in to the Participant Portal at <https://portal.cdr.gov.au> and select **Applications** from the top navigation menu followed by the **View your applications** tile.
2. Find the relevant application and under the **Actions** column select **Withdraw**.

Applications
Organisation A

Hi Em
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.

WARNING:

From time to time accreditation application forms will be updated to reflect changes to the CDR Rules and/or information requirements. When an application form has been superseded, recently commenced or modified draft applications will have 2 weeks to complete and submit the form before it is no longer editable and a new form will be required. Superseded draft applications may be viewed and/or withdrawn.

Data recipient applications - unrestricted level

Application ref ↑	Applicant	Started by	Modified on	Status	Actions
DRAP001106	Organisation A	Mahendra Hewa	12/01/2023 1:06 PM	Draft	Edit Withdraw View

7.2.5 Withdraw a submitted application

A Primary Business Contact can withdraw a submitted accreditation application by submitting a change request.

To withdraw a submitted application:

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-hand navigation menu and select **Notify or request a change**.

3. Under **Change type** select **Withdraw submitted application**.
4. Select the application that you would like to withdraw and select **Submit request**.

The screenshot shows the 'Organisation' page for 'Organisation A'. The user is logged in as 'Hi Em', acting as the Primary Business Contact. The 'Organisation' tab is active in the top navigation bar. On the left, a sidebar lists various actions, with 'Change request' highlighted. The main content area is titled 'Notify or request a change' and includes instructions to select an option and provide required information. Under 'Change type', the option 'Withdraw submitted application' is selected. Below this, there is a section titled 'Withdraw a submitted application' with a text box for 'Reason for application withdrawal' and a search bar for 'Select application'.

7.2.6 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.

7.3 Other change requests

Once an application has been submitted, a Primary Business Contact can 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 the 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. 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 menu.
3. Click on the **Notify or Request a change** button.
4. Select the relevant change type:
 - a. information in support of accreditation
 - b. withdraw submitted application
 - c. notifications (CDR Rule 5.14)
 - d. amend a rule 9.4 report
 - e. other changes.
5. Complete supporting information and upload documents if required.
6. Click on the **Submit request** button.

The screenshot shows the Participant Portal interface. At the top is a blue navigation bar with icons and labels for Home, Applications, Organisation (highlighted with a green box), Participation, Profile, Swap org, and Sign out. Below this is a dark blue header for the 'Organisation' section, showing 'Organisation A' and a user profile for 'Hi Em' acting as the Primary Business Contact. On the left, a sidebar lists navigation options: Legal entity, Update addresses, User list, Change request (highlighted with a green box and arrow), Agreements, Reports, CDR sponsorship arrangement, and CDR representative arrangement. The main content area is titled 'Change requests' and includes a description: 'To make a change to your organisation or accreditation details, complete the 'request a change' form.' A button labeled 'Notify or request a change' is highlighted with a green box. Below this is a table showing a list of change requests.

Request ref ↑	Status	Type	Date	Requested By
CH001102	Approved	Amend a rule 9.4 report	06/02/2023	Em M

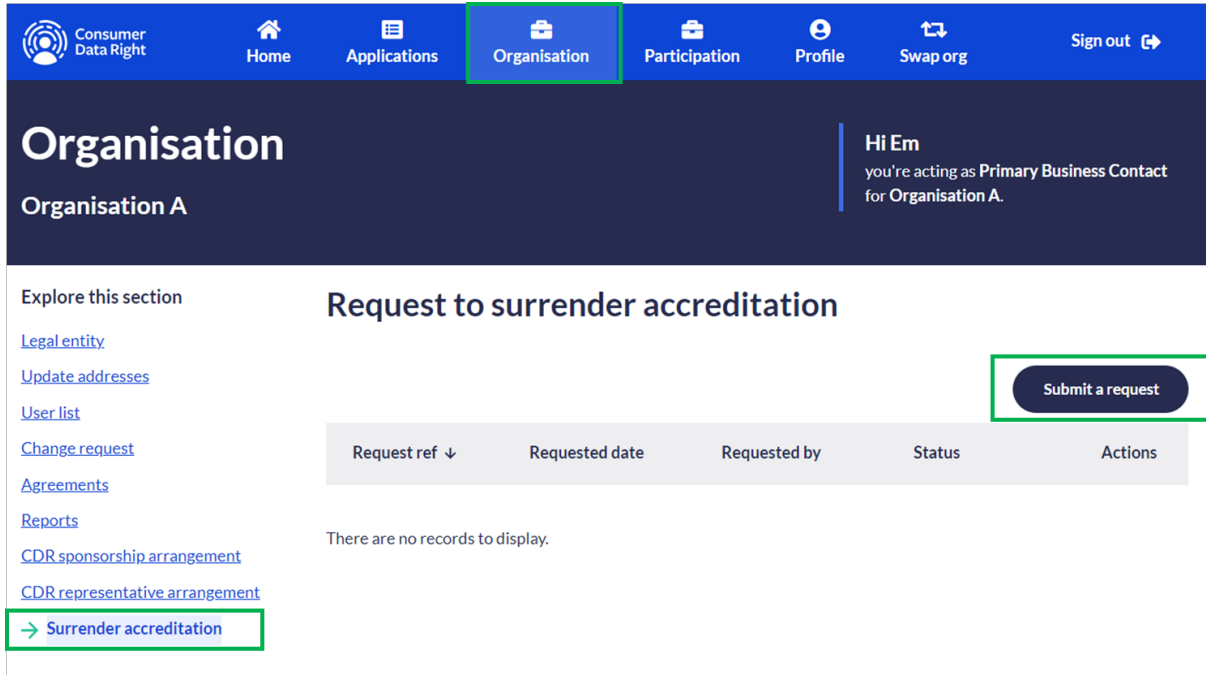
7.4 Surrender accreditation

7.4.1 Submit a request to surrender accreditation

A Primary Business Contact can submit a request to surrender accreditation from the Participant Portal. Please note that surrendering accreditation is a significant action. Once a request to

surrender accreditation has been accepted by the Data Recipient Accreditor, it cannot be reversed.

1. Log in to the Participant Portal at <https://portal.cdr.gov.au> and select **Organisation** from the top navigation menu.
2. Select **Surrender accreditation** from the left side navigation menu, and then select **Submit a request** button to open up the form.



Consumer Data Right Home Applications **Organisation** Participation Profile Swap org Sign out

Organisation

Organisation A

Hi Em
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](#)
- [CDR representative arrangement](#)
- [→ Surrender accreditation](#)

Request to surrender accreditation

[Submit a request](#)


Request ref ↓	Requested date	Requested by	Status	Actions
There are no records to display.				

3. Complete all mandatory fields and select the **Submit request** button to submit the form.
4. Upon submission, a confirmation will be displayed.

7.4.2 Withdraw your request to surrender accreditation

Before the surrender request is processed and accepted by the Data Recipient Accreditor, you can withdraw the request from the Participant Portal.

1. From the **Surrender accreditation** landing page, select the **Withdraw** action to open the form.

 Consumer Data Right

Home


Applications

Organisation

Participation

Profile

Swap org

Sign out 

Organisation

Organisation A

Hi Em
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](#)
[CDR representative arrangement](#)
[→ Surrender accreditation](#)

Request to surrender accreditation

Request ref ↓	Requested date	Requested by	Status	Actions
SUR0001026	23/11/2023	Em M	Submitted	View Withdraw

2. Provide reason for withdrawal and submit the form.
3. Upon submission, a confirmation will be displayed.

8 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: Organisation Page
 The 'Organisation' page for 'Organisation A' shows a list of agreements under the heading 'Agreements list'. The table lists the following agreements:

Reference	Agreement	Version	Version status	Accepted on	Actions
AGR001360	Subscriber agreement	1.07	Not Active	14/12/2021	View
AGR001358	Relying party agreement	1.07	Not Active	14/12/2021	View
AGR002331	Relying party agreement	1.08	Current		View
AGR002632	Trade mark license agreement	1.13	Current		View
AGR002714	Subscriber agreement	1.10	Current		View

Green arrows indicate the flow from the 'View' link for the 'Subscriber agreement' (AGR002714) to the 'Subscriber agreement' page, and from the 'View' link for the 'Trade mark license agreement' (AGR002632) to the 'Trade mark license agreement' page.

Bottom Left Screenshot: Subscriber agreement Page
 The 'Subscriber agreement' page for 'Organisation A' shows the agreement details and two checkboxes for acceptance:

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

Top Right Screenshot: Relying party agreement Page
 The 'Relying party agreement' page for 'Organisation A' shows the agreement details and two checkboxes for acceptance:









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

Bottom Right Screenshot: Trade mark license agreement Page
 The 'Trade mark license agreement' page for 'Organisation A' shows the agreement details and two checkboxes for acceptance:

- ☒ I have read the agreement and accept on behalf of this organisation
- ☒ I am the duly authorized 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
  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](#)

Agreements list

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

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.

9 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.

9.1 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. Log in to the Participant Portal at <https://portal.cdr.gov.au> and select **Organisation**.

The screenshot shows the 'Organisation' page in the Participant Portal. The top navigation bar includes links for Home, Applications, Organisation (highlighted), Participation, Profile, Swap org, and Sign out. The main header displays 'Organisation' and 'BOOST PTY. LTD.' with a user greeting 'Hi Em' indicating the user is acting as the Primary Business Contact. A sidebar on the left lists various actions under 'Explore this section', with 'Legal entity' selected. The main content area, titled 'Legal entity details', displays the following information:

Legal entity name	Organisation A
Legal entity type	—
Legal entity data recipient status	Active
Accreditation Level	Unrestricted
Accreditation Number	ADRBK5656586
Legal entity data holder status	Registered

2. The landing page displays the Organisation details in which you can update your legal entity details:
 - a. logo URI
 - b. website URL
 - c. CDR policy URL

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

1. If you need to update your address, select **Update addresses** in the left side navigation menu to update your registered business addresses, registered address for service or local agent address for service and select **Update** to save.

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](#).

9.2 CDR representative arrangement notification

The CDR representative arrangement model allows eligible participants to access and use CDR data without the need for accreditation in circumstances where they offer CDR-related services to consumers as a representative of an unrestricted accredited data recipient.

The principal (an unrestricted accredited data recipient) must notify the Data Recipient Accreditor as soon as practicable, and within 5 business days, of entering into a new CDR representative arrangement. Likewise, the principal must also notify the Data Recipient Accreditor if the arrangement terminates or otherwise ends as soon as practicable, but no later than 5 business days after the event. Once notified, the Data Recipient Accreditor will verify the arrangement and the Registrar will publish details of the arrangement on the [CDR Register](#).

Only a primary business contact or a legal authority contact of an unrestricted accredited data recipient has the ability to notify a new CDR representative arrangement on the CDR Participant Portal and edit / end an existing arrangement.

9.2.1 Notify a new CDR representative arrangement

To notify a new CDR representative arrangement, follow the steps below:

1. Log in 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. From the landing page, select the **Notify new representative arrangement** button to launch the notification form.
4. Complete all mandatory questions and submit the form.
5. Once submitted, the representative arrangement details will be displayed on the page.

Organisation

Organisation A

Hi Em
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](#)
- [→ CDR representative arrangement](#)

Representative arrangement details

[Notify new representative arrangement](#)

Enter text to search...

CDR representative name	Date arrangement entered into ↑	Arrangement end date	Status	Actions
Representative A	01/09/2022	31/08/2023	Active	Edit / end

9.2.2 Edit or end a representative arrangement

Certain details of a representative arrangement can be updated, this includes the end date of the arrangement.

To edit or end a representative arrangement, follow the steps below:

1. Log in 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. From the landing page, find the relevant arrangement that needs to be updated and select **Edit / end** to launch the form.
4. Update the necessary information and submit the update.



Note: Once an arrangement has expired, the edit functionality will no longer be available.

9.3 CDR sponsorship arrangement notification

A sponsorship arrangement is a written contract between an unrestricted accredited data recipient (the sponsor) and another person (the affiliate) and provides for the sponsor to disclose CDR data to its affiliate in response to a consumer data request.

The sponsor must notify the Data Recipient Accreditor of becoming a sponsor of an affiliate, or the suspension, expiration or termination of a sponsorship arrangement, and must do so as soon as practicable, and in any event, within 5 business days.

Only a primary business contact or a legal authority contact of an unrestricted accredited data recipient has the ability to access the CDR sponsorship arrangement notification process on the CDR Participant Portal.

9.3.1 Notify a new sponsorship arrangement

To notify a new CDR sponsorship arrangement, follow the steps below:

1. Log in 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. From the landing page, select the **Notify new sponsorship arrangement** button to launch the notification form.
4. Complete all mandatory questions and submit the form.
5. Once submitted, the sponsorship arrangement details will be displayed on the page.

Organisation

Organisation A

Hi Em
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**
- [CDR representative arrangement](#)

Sponsorship arrangement details

[Notify new sponsorship arrangement](#)

Affiliate legal entity name	Arrangement start date	Arrangement end date ↑	Status ↑	Actions
AART INVESTMENTS PTY LTD	09/01/2022		Active	End arrangement
AART INVESTMENTS PTY LTD	31/12/2021	04/01/2022	Inactive	

9.3.2 Notify the end date of a sponsorship arrangement

To notify the end date of a sponsorship arrangement, follow the steps below:

1. Log in 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 directed to the CDR sponsorship arrangement details page where you can notify the end date of an arrangement by selecting **End arrangement** from the 'Actions' column.

9.3.3 View sponsorship arrangements

If you are a sponsor, i.e. data recipient accredited at the unrestricted level:

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

If you are an affiliate, i.e. data recipient accredited at the sponsored level:

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

10 Manage participation details



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

10.1 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. Log in 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.

Participation
Organisation A

Hi Emma
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	View Edit

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

1. Log in 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.

 Consumer Data Right

[Home](#) [Applications](#) [Organisation](#) [Participation](#) [Profile](#) [Swap org](#) [Sign out](#)

Participation

HAPPY PTY LTD

Hi Tim

you're acting as Primary Business Contact for HAPPY PTY LTD.

Explore this section

[Brands](#)

Brands

[Add new brand](#)

Brand ↑	Brand type	Status	Actions
brand name RT	Primary	Active	View Edit
Rtey's	Primary	Active	View Edit

3. Complete the form and select **Submit Request**.

Consumer Data Right

Home
Applications
Organisation
Participation
Profile
Swap.org
Sign out

Participation
HAPPY PTY LTD

Hi Tim
you're acting as Primary Business Contact
for HAPPY PTY LTD.

Explore this section
[Brands](#)
Note: Changes to brand details
Changes to brand details are subject to an approval process, and as such will not be reflected immediately on the Public register. We endeavour to process these approvals as quickly as possible, you will be notified via email when your changes are applied.

Brand name *

brand name RT update

Brand description *

brand name RT description

25 of 2000 characters

Reason for brand change *

For doco purposes

17 of 2000 characters

Proposed publication date (optional)

DD/MM/YYYY

← Back

Submit request

4. The system will return a Success Page.

Consumer Data Right

Home Applications Organisation Participation Profile Swap org Sign out

Participation

HAPPY PTY LTD

Hi Tim
you're acting as Primary Business Contact for HAPPY PTY LTD.

Explore this section

[Brands](#)

Submitted
 Your request to change brand details has been submitted. Your reference number is CR001048.

Changes to your brand are subject to an approval process and will be updated on the Register as soon as possible. Confirmation of your change request has been sent via email.

You can view the status of your change request [here](#).

Notification of the approval outcome will be sent to you via email.

If you have further enquiries please contact us at CDRonboarding@accc.gov.au

[← Back](#)

5. The “here” link in the Success Page will take the user to a list of the current Change Requests

Consumer Data Right

Home Applications Organisation Participation Profile Swap org Sign out

Organisation

HAPPY PTY LTD

Hi Tim
you're acting as Primary Business Contact for HAPPY PTY LTD.

Explore this section

[Legal entity](#)

[Update addresses](#)

[User list](#)

[Change request](#)

→ [Register change requests](#)

[Agreements](#)

[Reports](#)

[Rule 9.4 reports](#)

[Schedule 1 reports](#)

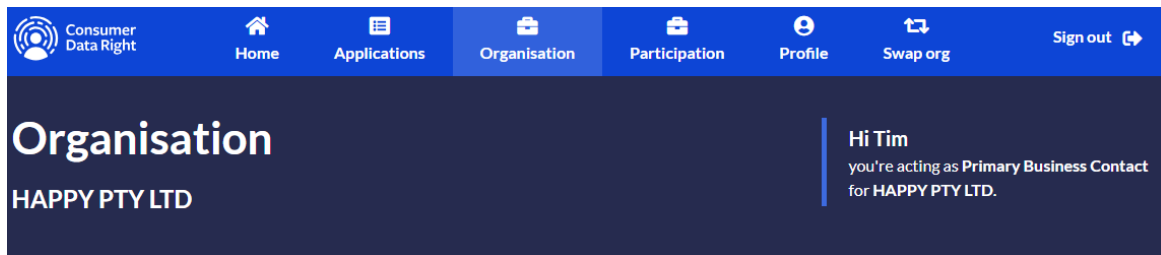
[CDR sponsorship arrangement](#)

[Surrender accreditation](#)

Register change requests

Request ref ↓	Type	Requested on	Requested by	Status	Actions
CR001048	Brand	04/04/2025	Tim Smith	Submitted	View
CR001020	Brand	11/02/2025	pallavi pattanayak2	Completed	View
CR001015	Brand	23/01/2025	Tim Smith	Rejected	View
CR001014	Brand	23/01/2025	Will Allison	Rejected	View

6. The “View” link will take the user to a page that contains details of the status of the change request.



Explore this section

[Legal entity](#)
[Update addresses](#)
[User list](#)
[Change request](#)
[Register change requests](#)
[Agreements](#)
[Reports](#)
[Rule 2.4 reports](#)
[Schedule 1 reports](#)
[CDR sponsorship arrangement](#)
[Surrender accreditation](#)

Register change details

Change register details - Brand

Ref number

CR001048

Date submitted

04/04/2025

Old brand name

brand name RT

New brand name

brand name RT update

Old brand description

brand name RT

10.2 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. Log in 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.

The screenshot shows the 'Participation Organisation A' page. Under 'Brand details', there is a table for 'Brand participation'. A green box highlights the 'Add participation' button in the table's header. A green arrow points from this button to the 'Brand participation details' form on the right. The form includes fields for 'Participation type', 'Logo URI', 'Website URL', and 'CDR policy URL', along with 'Back' and 'Add participation' buttons at the bottom.

10.3 Maintain software product details

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

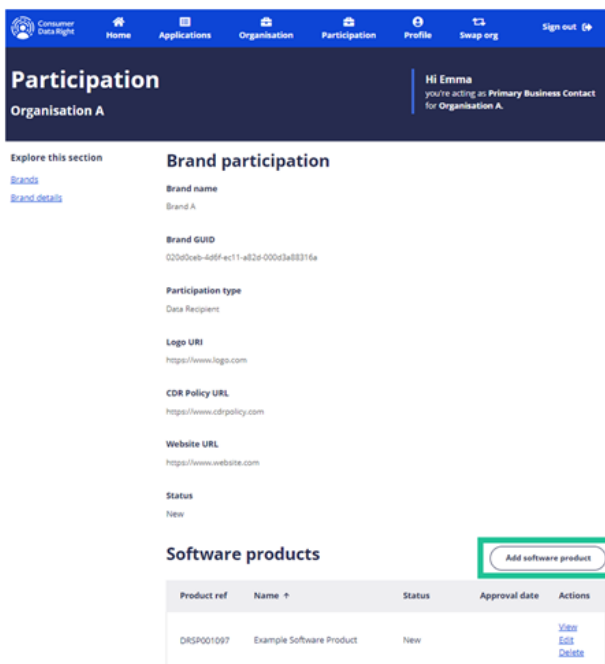


Note: Only a primary IT contact and authorised IT contact can add or edit software product details

10.3.1 Adding new software products

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

1. As a primary IT contact or authorised IT contact, log in 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
02060ceb-4d9f-ec11-a82e-000d3a88316e

Participation type
Data Recipient

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

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

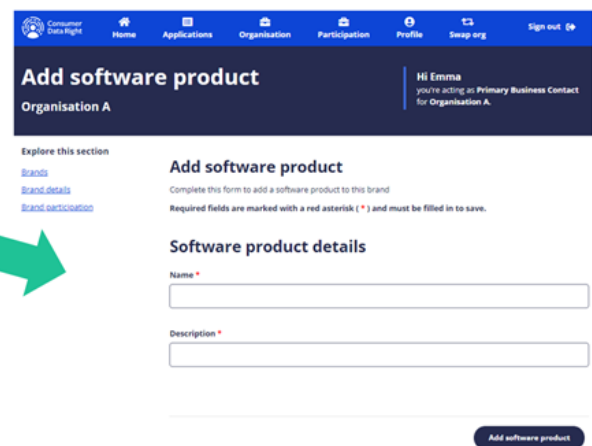
Website URL
<https://www.website.com>

Status
New

Software products

Product ref	Name	Status	Approval date	Actions
DRSP001097	Example Software Product	New		View Edit Delete

[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](#)

10.3.2 Maintaining existing software products

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

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



Hello Tim

Welcome to the CDR participant portal.

Active organisation: HAPPY PTY LTD

Your role: Primary Business Contact

An accredited person failing to notify the ACCC (as the DRA) of any change or error in information on the Register in accordance with r 5.14(1) of the CDR Rules; or a data holder or associated person failing to notify the ACCC (as the Registrar) once it becomes aware that information needs to be updated or amended in accordance with rule 5.25 of the CDR Rules, may be subject to a civil penalty.


It is an offence for a person to give information to the ACCC knowing that the information is false or misleading, or omits any matter or thing without which the information is misleading, and the information provided is therefore false or misleading in a material particular.




Action Required: Agreements

An authorised representative is required to read and accept an agreement on behalf of HAPPY PTY LTD. [Click here](#) to go to the agreements page.

 Applications


 Your organisation

 Your profile

 Swap organisation



2. Select the **View** action on the brand for the software product that you wish to update

 Consumer Data Right

[Home](#)[Applications](#)[Organisation](#)[Participation](#)[Profile](#)[Swap org](#)[Sign out](#)

Participation

MR T ONLINE PTY. LTD.

Hi Tim

you're acting as Primary Business Contact for MR T ONLINE PTY. LTD..

Explore this section


[Brands](#)

Brands

Add new brand

Brand ↑	Brand type	Status	Actions
Anwar's Brand	Primary	Active	View Edit
Dreamz	Primary	Active	View Edit
MAMA Changed	Primary	Active	View Edit
McOz Finance	Primary	Active	View Edit
Tim's brand test demo no pub date	Primary	Active	View Edit

3. Select the **View** action on the brand participation for the software product that you wish to update

 Consumer Data Right

[Home](#)

[Applications](#)

[Organisation](#)

[Participation](#)

[Profile](#)

[Swap org](#)

[Sign out](#)

Participation

MR T ONLINE PTY. LTD.

Hi Tim

you're acting as Primary Business Contact for MR T ONLINE PTY. LTD..

Explore this section

[Brands](#)

Brand details

Brand name

Tim's brand test demo no pub date

Brand description

UAT

Brand type

Primary

Status


Active

Brand participation

Add participation

Participation type ↑	Organisation type	CDR sector	Status	Actions
Data Recipient	Business Name		Inactive	View Edit

4. Select the **Edit** action and fill in the form

 Consumer Data Right

Home

Applications

Organisation

Participation

Profile

Swap org

Sign out

Participation

MR T ONLINE PTY. LTD.

Hi Tim
you're acting as **Primary Business Contact**
for **MR T ONLINE PTY. LTD.**

Explore this section

[Brands](#)[Brand details](#)

Brand participation

Brand name

Tim's brand test demo no pub date

Brand GUID

fb9673fc-ad09-ee11-a81c-000d3ad110d4

Participation type

Data Recipient

Logo URI<https://www.eee>**CDR Policy URL**<https://www.eee>**Website URL**<https://www.eee>**Status**

Inactive

Software products

[Add software product](#)

Product ref	Name ↑	Status	Approval date	Actions
DRSP004143	Software Product UAT new	Inactive		View Edit
DRSP001281	Software Product wXYZ - new 1	Active		View Edit

Consumer Data Right

Home
Applications
Organisation
Participation
Profile
Swap org
Sign out

Participation
MRT ONLINE PTY. LTD.

Hi Tim
you're acting as Primary Business Contact
for MRT ONLINE PTY. LTD.

Explore this section

[Brands](#)
[Brand details](#)
[Brand participation](#)

Change register details - Software product

Note: Changes to software product details
Changes to software product details are subject to an approval process, and as such will not be reflected immediately on the Public register. We endeavour to process these approvals as quickly as possible, you will be notified via email when your changes are applied.

Name *

If the software product is used in a CDR representative arrangement, please include the full name of the CDR representative. A brand name can also be included in this software product name, for example "Financial Services company Pty Ltd (Primary money)".

29 of 160 characters

Description *

Describe the features or benefits of the software product with reference to how the CDR data will be used, for example "Primary money's corporate manager uses CDR data to allow you to see all your balances in one application."

Reason for software product change *

Please provide a reason for changing software product details.

20 of 2000 characters

Proposed publication date (optional)

ACCC will publish your changes as soon as possible following our approval procedures. Should you require publication of your changes to be delayed beyond this, please enter your preferred date of publication below.

← Back

Submit request

5. The system will return a Success Page.

Consumer Data Right

Home Applications Organisation Participation Profile Swap org Sign out

Participation

MR T ONLINE PTY. LTD.

Hi Tim
you're acting as Primary Business Contact for MR T ONLINE PTY. LTD..

Explore this section

- [Brands](#)
- [Brand details](#)
- [Brand participation](#)

Submitted
Your request to change software product details has been submitted. Your reference number is CR001050.

Changes to your software product are subject to an approval process and will be updated on the Register as soon as possible. Confirmation of your change request has been sent via email.

You can view the status of your change request [here](#).

Notification of the approval outcome will be sent to you via email.

If you have further enquiries please contact us at CDRONboarding@accc.gov.au

[← Back](#)

6. The “here” link in the Success Page will take the user to a list of the current Change Requests

Consumer Data Right

Home Applications Organisation Participation Profile Swap org Sign out

Organisation

MR T ONLINE PTY. LTD.

Hi Tim
you're acting as Primary Business Contact for MR T ONLINE PTY. LTD..


Explore this section

- [Legal entity](#)
- [Update addresses](#)
- [User list](#)
- [Change request](#)
- [→ Register change requests](#)
- [Agreements](#)
- [Reports](#)
 - [Rule 9.4 reports](#)
- [CDR sponsorship arrangement](#)
- [CDR representative arrangement](#)

Register change requests

Request ref ↓	Type	Requested on	Requested by	Status	Actions
CR001050	Software Product	07/04/2025	Tim Smith	Submitted	View
CR001049	Software Product	07/04/2025	Tim Smith	Rejected	View
CR001047	Software Product	01/04/2025	Anwar Tariq	Rejected	View
CR001046	Brand	31/03/2025	Tim Smith	Completed	View

7. The “View” link will take the user to a page that contains details of the status of the change request.

 Consumer Data Right
 Home Applications **Organisation** Participation Profile Swap org Sign out

Organisation

MR T ONLINE PTY. LTD.

Hi Tim
 you're acting as Primary Business Contact
 for MR T ONLINE PTY. LTD..

Explore this section

- [Legal entity](#)
- [Update addresses](#)
- [User list](#)
- [Change request](#)
- [Register change requests](#)
- [Agreements](#)
- [Reports](#)
 - [Rule 9.4 reports](#)
- [CDR sponsorship arrangement](#)
- [CDR representative arrangement](#)
- [Surrender accreditation](#)

Change register details - Software product

Ref number	CR001050
Date submitted	07/04/2025
Old software product name	Software Product wXYZ - new 1
New software product name	Software Product wXYZ - new 2
Old software product description	Software Product wXYZ - new 1
New software product description	Software Product wXYZ - new 2

10.4 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 [CDR website](#).

To manage production or Conformance Test Suite (CTS) certificates for a brand, please follow the instructions below:

1. Log in 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 either the **Production details** tile or the **CTS Details** tile towards the bottom of the page to navigate to the relevant details page for the environment the certificate is required for.

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

1. Log in 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 either the **Production details** tile or the **CTS Details** tile towards the bottom of the page to navigate to the relevant details page for the environment the certificate is required for.



Further details on requesting and managing the CTS Certificate can be found on the [Maintain CTS certificates](#) page in this User Guide.

10.4.1 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

[Request a certificate](#)

Certificate Ref	Common Name	Status ↑	Expiry Date	Actions
CE001289	19117uattest.com	Valid	27/07/2021	Download Renew Revoke View
CE001290	19118uattest.com	Valid	18/10/2021	Download Revoke View

10.4.2 Request a CTS certificate

Data holder and data recipients can request for a brand or software product CTS 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 CTS certificate.

CTS Certificates

[Request a CTS certificate](#)

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

10.4.3 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

[Request a certificate](#)

Certificate Ref	Common Name	Status ↑	Expiry Date	Actions
CE001289	19117uattest.com	Valid	27/07/2021	Download Renew Revoke View
CE001290	19118uattest.com	Valid	18/10/2021	Download Renew View

10.4.4 Revoke a CTS certificate

Data holders and data recipients can revoke their existing valid CTS 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 CTS certificate select the **Revoke** action and confirm your selection.

CTS Certificates

[Request a CTS certificate](#)

Certificate ref ↑	Common name	Status	Expiry date	Actions
CTSCE001128	Very sweet	Valid	07/04/2023	View Download Revoke

10.4.5 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
CE001289	19117uattest.com	Valid	27/07/2021	Download Renew Revoke View
CE001290	19118uattest.com	Valid	18/10/2021	Download Revoke View

10.4.6 Renew a CTS certificate

Data holder and data recipients can renew an existing CTS certificate using the Participant Portal so that the brand or soft product can continue to transfer data securely within the testing ecosystem. This option will become available 7 days before a valid certificate's expiry date. To renew a CTS certificate, select the **Renew** action and confirm the details of the certificate.

CTS Certificates

[Request a CTS certificate](#)

Certificate ref ↑	Common name	Status	Expiry date	Actions
CTSCE001128	Very sweet	Valid	07/04/2023	View Download Renew Revoke

10.5 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. Log in 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. Log in 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.

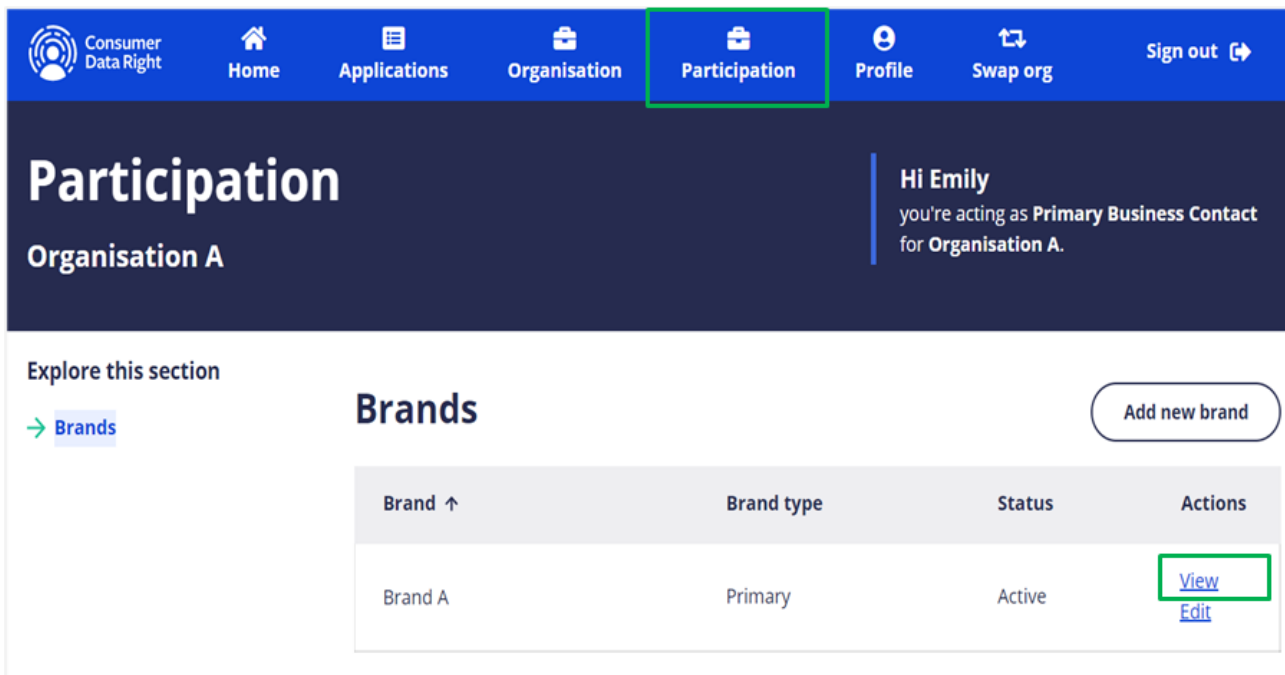
11 Maintain Conformance Test Suite (CTS) details

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**.



The screenshot displays the Participant Portal interface. The top navigation bar includes links for Consumer Data Right, Home, Applications, Organisation, Participation (highlighted), Profile, Swap org, and Sign out. The main header area shows 'Participation' and 'Organisation A'. A user greeting 'Hi Emily' indicates the user is acting as the Primary Business Contact for Organisation A. Below this, the 'Brands' section is visible, featuring a table with the following data:

Brand ↑	Brand type	Status	Actions
Brand A	Primary	Active	View Edit

The 'View' link in the Actions column for 'Brand A' is highlighted with a green box.

Brand participation

[Add participation](#)

Participation type ↑	Organisation type	CDR sector	Status	Actions
Data Holder	Business Name	Banking	New	View Edit Delete



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
DRSP001033	Pumpkin Hunt	Inactive		View
DRSP001032	Snackos	Inactive		View

- 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.

- 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				

- The **Before you start** page displays information on what to expect and what information is required to complete CTS testing. Please read carefully.
- Select **Start** to commence enrolment.
- In the **Contact details** section, you can create new CTS testers or edit and remove existing CTS tester as required.
- 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	Edit Remove

- Select **Save and continue** to proceed to the next section.
- 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.

- Complete the details and select **Save and continue**.
 - Data Holders proceed to Step 9 (Ciphers section)
 - Data Recipients proceed to Step 12 (Review section)
- In the **Ciphers** section, indicate which Cipher(s) your brand support and select **Save and continue** to proceed.
- Complete the relevant details relating to your test data preparation and select **Save and continue** to proceed.
- Complete the **Network configuration** details relevant to your brand and select **Save and continue** to proceed.

- 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**.
- To submit your CTS enrolment form, you must review and accept the details in the acknowledgment page, and then select **Submit CTS enrolment form**.
- Upon submission, your CTS conformance ID will be displayed on the submission confirmation page. Additionally, you will also receive this confirmation by email.

Submitted

You 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

- 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				

- Proceed to fill in the mandatory fields.

11.3.1.1 Data Holder Server CTS Certificate type default screen

Request a CTS certificate

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

CTS Certificate type *

CTS DNS name *

CTS Additional DNS names

CTS Certificate signing request *

CTS Email *

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

[← Back to CTS details](#)

[Request CTS certificate](#)

11.3.1.2 Data Recipient Client CTS Certificate type default screen

Request a CTS software product certificate

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

CTS Certificate type *

CTS Certificate signing request *

CTS Email *

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

[← Back to CTS details](#)

[Request CTS certificate](#)

- When the mandatory fields have been completed including the agreement to the certificate management policies checkbox, then the User can request a CTS certificate by clicking the Request CTS certificate button.

11.3.2 Receive CTS certificate

- 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.

11.3.2.1 Successful submission

- Upon successful request submission, an approval success page will be displayed with a CTS certificate Download hyperlink and a button to return to an updated CTS Details page.

**Approved**

Your request for a CTS certificate for Sweeter has been approved and is ready for [Download](#). The certificate (including its issuing chain), and installation instructions are provided in the CTS Certificates section of the CTS details.

Your certificate reference number is CTSCE001135.

[Back to CTS details](#)

- The CTS Details page is updated to show the certificate status as Valid and provide actions to view, download, revoke and renew the CTS certificate. The Renew action will only appear when the Valid CTS certificate is approaching its expiry date.

CTS Certificates

[Request a CTS certificate](#)

Certificate ref ↑	Common name	Status	Expiry date	Actions
CTSCE001140	https://testcorp518.com.au	Valid	08/06/2024	Download Revoke View

- The Renew action will only appear when the Valid CTS certificate is approaching its expiry date.

CTS Certificates

[Request a CTS certificate](#)

Certificate ref ↑	Common name	Status	Expiry date	Actions
CTSCE001128	Very sweet	Valid	07/04/2023	View Download Renew Revoke

- Data holders and data recipients can View current and historical CTS certificates from the Participant Portal by selecting **View** from the Actions column.
- Viewing the CTS Certificate will provide details of the CTS Certificate and provide certificate installation instructions.



Certificate installation instructions

Install this certificate on the device where you generated the CSR for this certificate. You may need to install the root CA to use this certificate. For your convenience, the root CA is also provided.

Note: Before installing these certificates, you will need to copy the certificate data into a text editor and save them as separate files with .p7b extensions.

For installation instructions, refer to the vendor documentation for this device.

CTS Certificate

CTS Brand name

Sour

CTS Certificate type

Server

CTS Common name

<https://testcorp518.com.au>

CTS DNS name

<https://testcorp518.com.au>

CTS Additional DNS names

—

CTS Email

tester@tester.com

CTS Certificate signing request

-----BEGIN CERTIFICATE REQUEST-----

```
MIIDQjCCAQAwYoxIzAhBgNVBAMMGmh0dHBzOiBvdGVzdGNvcnA1MTguY29t
LmF1MQswCQYDVQQGEwJBVTEYMBYGA1UECAwPTmV3IFNvdXRolFdhbGVzMQ8wDQYD
VQQHDAZTeWRuZlZlZDQwLmF1MQswCQYDVQGEwJBVTEYMBYGA1UECAwPTmV3IFNvdXRolFdhbGVzMQ8wDQYD
dGEgUmlnaHQwggEiMA0GCSqGSIb3DQCBAA4IBDwAwggEKAoIBAQDhInMxNRPF
NpF3I8biAWX2QURbmVhVvYv3IIKR8FqxaQ38ZOo5ppjZULnHTz1QI6zpRHUnikj
4q2GfBHah/QY7OnAP1d20BjAiUnbZLG3qUw3b+umx0XKk0eRINX6h4vBiRMBsQj
VknPRq2JR44zqckVCrQpCI3RsUGWKzBj7RTXQs3kbveB3BRdkCdWnHLmvKzleg0M
OIIcFGgZ+cXE06Km26tDZlxs21yEkQZBWshUAKQwFuzfXAg0w03h3+VT0iZhCtV
sow9E+bj0KXGXYfDgHuOleTrWUaeTO2zphHmxp+MSDZq3GwmBfDOCownNXTLZk
```

CTS Issue date

08/05/2023

CTS Expiry date

08/06/2024

Status

Valid

[← Back to CTS details](#)

11.3.2.2 Unsuccessful submission

- Upon an unsuccessful request submission, a failed message will be displayed.
- Submissions with incorrect details will include the reason for the failure in the message and will display the CTS certificate request details.



The request for a CTS certificate could not be validated and has a CTS certificate status of Failed for the following reasons:

Invalid CSR: Organization name mismatch: CSR organization '03.04 Grapes' does not match 'Sweet'

CTS software product certificate

CTS Brand name

- A communication link failure message will request the user to try again and/or to contact CDR Technical Operations if the error persists.



The request for a CTS Certificate could not be validated and has a CTS certificate status of Failed for the following reasons:

An error has occurred. Please try again later. If the error persists, please contact CDRTechnicalOperations@accc.gov.au to complete the process of requesting the CTS certificate.

CTS Certificate

CTS Brand name

- The status of an unsuccessful request will be Failed and this status will be displayed on the CTS Certificate and on the CTS Certificate details page.

CTS Certificates

[Request a CTS certificate](#)

Certificate ref ↑	Common name	Status	Expiry date	Actions
CTSCE001126	Very sweet	Failed		View

11.3.3 Download CTS certificate

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

CTS Certificates

[Request a CTS certificate](#)

Certificate ref ↑	Common name	Status	Expiry date	Actions
CTSCE001140	https://testcorp518.com.au	Valid	08/06/2024	Download Revoke View

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:

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

CTS Certificates

[Request a CTS certificate](#)

Certificate ref ↑	Common name	Status	Expiry date	Actions
CTSCE001140	https://testcorp518.com.au	Valid	08/06/2024	Download Revoke View

- In the 'Are you sure you want to revoke the certificate' field, select the **Yes** radio button.
- When the Yes radio button is selected an information warning will be displayed.

CTS Expiry date

08/06/2024

Status

Valid

Are you sure you want to revoke the certificate? *

☐ No ☒ Yes



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

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

CTS Revoke reason *

Key compromised

i 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:

- 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		View
CTSCE001018	harshactstesting89	Failed		View
CTSCE001020	harshactstesting89.com	Valid	07/08/2021	View Download Renew Revoke
CTSCE001023	testDRRevoke.com	Requested		View

- Complete the certificate renewal form and select **Renew CTS certificate** to submit the form.



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.

- When the agreement checkbox is selected an information warning will be displayed.

Status

Valid



I have read and agree to the certificate management policies *



If you renew this CTS certificate, a new CTS certificate request will be made. The current certificate will remain valid until the expiry date has passed.

- You will be notified via email of the outcome of the renewal request and the CTS certificate details page will display both the current Valid certificate and the newly renewed certificate.

CTS Certificates

[Request a CTS certificate](#)

Certificate ref ↑	Common name	Status	Expiry date	Actions
CTSCE001126	Very sweet	Failed		View
CTSCE001127	Very sweet	Failed		View
CTSCE001128	Very sweet	Valid	07/04/2023	View Download Revoke
CTSCE001129	Very sweet	Valid	08/04/2023	View Download Renew Revoke

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	Edit View

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	Edit View

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 the [CDR Service Management portal](#) or the CDR Technical Operations mailbox CDRtechnicaloperations@accc.gov.au.

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	Edit View

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	Edit View

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	Edit View

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 the [CDR Service Management portal](#) or the CDR Technical Operations mailbox CDRtechnicaloperations@accc.gov.au.

12 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.



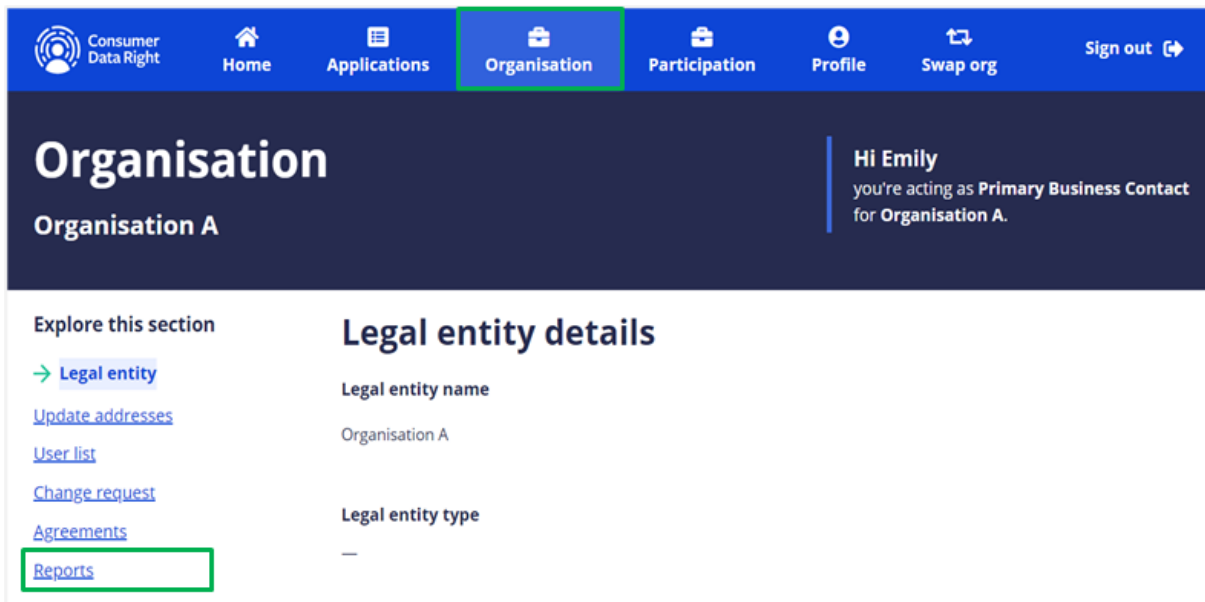
Note: By lodging the report via the Participant Portal, CDR participants will satisfy the requirement of submitting their reports to both the ACCC and the Office of Australian Information Commissioner.

12.1 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:

12.1.1 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.



2. Based on your participation (data holder, accredited data recipient, CDR principal), you will be presented with a summary view of your rule 9.4 reporting obligation for the current reporting period.

Reporting overview

Accredited data recipient reports

[View all accredited data recipient reports](#)

Reporting year	Reporting period ↑	Status	Due date	Date submitted	Submitted by	Actions
2022	1 July - 31 December	Not Started	30/01/2023			Start Download

1 - Example view for accredited data recipient

CDR principal reports

[View all CDR principal reports](#)

Enter text to search...							Q
CDR Representative ↑	Reporting year	Reporting period	Status	Due date ↑	Date submitted	Submitted by	Actions
Company A	2022	1 July - 31 December	Not Started	30/01/2023			Start Download
Company B	2022	1 July - 31 December	Not Started	30/01/2023			Start Download
Company D	2022	1 July - 31 December	Not Started	30/01/2023			Start Download

2 - Example view for accredited data recipient that is also a CDR principal

Data holder reports						View all data holder reports
Reporting year	Reporting period ↑	Status	Due date	Date submitted	Submitted by	Actions
2022	1 July - 31 December	Not Started	30/01/2023			Start Download

3 - Example view for data holder

3. Select **Start** from the Actions column.
4. Complete all mandatory questions and select **Submit**.
5. Upon submission, a confirmation will be shown.

12.1.2 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						
Accredited data recipient reports						View all accredited data recipient reports
Reporting year	Reporting period ↑	Status	Due date	Date submitted	Submitted by	Actions
2022	1 July - 31 December	Draft	30/01/2023			Edit Download

3. Proceed to edit and submit the report.
4. Upon submission, a confirmation will be shown.

12.1.3 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

Accredited data recipient reports

[View all accredited data recipient reports](#)

Reporting year	Reporting period ↑	Status	Due date	Date submitted	Submitted by	Actions
2022	1 July - 31 December	Draft	30/01/2023			Edit Download

12.2 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**.

The screenshot shows the Participant Portal interface. At the top, there is a navigation bar with icons and labels for 'Consumer Data Right', 'Home', 'Applications', 'Organisation' (highlighted with a green box), 'Participation', 'Profile', 'Swap org', and 'Sign out'. Below this, the main header area displays 'Organisation' and 'Organisation A' on the left, and a user greeting 'Hi Emily, you're acting as Primary Business Contact for Organisation A.' on the right. The main content area is titled 'Change requests' and includes a sub-header 'Explore this section' with a list of links: 'Legal entity', 'Update addresses', 'User list', '→ Change request' (highlighted with a green box), 'Agreements', and 'Reports'. To the right of the links, there is a 'Notify or request a change' button (highlighted with a green box). Below the button, there is a table with columns: 'Request ref ↑', 'Status', 'Type', 'Date', and 'Requested By'. The table is currently empty, with the text 'There are no records to display.' below it.

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.

Lookup Records ×

Name	CDR Representative ↓	Participation type	Status	Reporting period	Reporting year	Date submitted	Submitted by
✓ RR001988 - Organisation A - 1 July - 31 December 2022 - Sucasa Loans Pty Ltd	Sucasa Loans Pty Ltd		Submitted	1 July - 31 December	2022	07/11/2022	Em M

Select **Cancel** **Remove Value**

5. Complete the rest of the form and select **Submit request** to complete the process.
6. When the change request is approved, you will be notified by email, and the relevant report will be set to the **Draft** status to allow editing.

13 Getting help

If you have any questions about accessing and using the CDR Participant Portal, please contact us via the [CDR Service Management portal](#).

Alternatively, you can contact us via email at CDRtechnicaloperations@accc.gov.au.

14 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
------	----------	--------------	--------------	---------------------------	-------------

Primary business contact	<p>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</p>	<ul style="list-style-type: none"> • manage own profile • view user list • invite new users • assign and modify a user's role • modify details of existing users • remove a user 	<ul style="list-style-type: none"> • view and update organisation details • view and accept agreements • manage on-boarding • Submit change request • start, update and submit rule 9.4 report 	<ul style="list-style-type: none"> • start, view, update, submit, and withdraw "draft" accreditation application • create, update, view brand and brand participation • create, update and view software product • manage production certificate, authentication and endpoint details • submit CTS enrolment form • manage CTS certificate, authentication and endpoint details 	<ul style="list-style-type: none"> • register as a data holder • create, update, view brand and brand participation • manage production certificate, authentication and endpoint details • submit CTS enrolment form • manage CTS certificate, authentication and endpoint details
---------------------------------	--	--	---	---	---

			<ul style="list-style-type: none">• Notify CDR representative arrangement (unrestricted ADR)• Notify CDR sponsorship arrangement (unrestricted ADR)• Surrender accreditation	
--	--	--	--	--

Authorised business contact	Performs a supporting administrator role for the legal entity's activities on the Participant Portal	<ul style="list-style-type: none"> • manage own profile • view user list 	<ul style="list-style-type: none"> • view and update organisation details • view agreements • view change request • start, update and submit a rule 9.4 report 	<ul style="list-style-type: none"> • view, update and withdraw “draft” accreditation application • create, update, view brand and brand participation • view software product production certificate, authentication and endpoint details 	<ul style="list-style-type: none"> • register as a data holder • create, update, view brand and brand participation • view production certificate, authentication and endpoint details
------------------------------------	--	--	--	--	---

Primary IT contact	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"> • manage own profile • view user list 	<ul style="list-style-type: none"> • view organisation details • view agreements • manage on-boarding • view change request • start, update and submit a rule 9.4 report 	<ul style="list-style-type: none"> • view, update and withdraw “draft” accreditation application • create, update, view brand and brand participation • create, update and view software product • manage production certificate, authentication and endpoint details • submit CTS enrolment form • manage CTS certificate, authentication and endpoint details 	<ul style="list-style-type: none"> • view registration • create, update, view brand and brand participation • manage production certificate, authentication and endpoint details • submit CTS enrolment form • manage CTS certificate, authentication and endpoint details
---------------------------	---	--	---	---	---

Authorised IT contact	An authorised IT contact is a support role for the primary IT contact	<ul style="list-style-type: none"> • manage own profile • view user list 	<ul style="list-style-type: none"> • view organisation details • view agreements • manage on-boarding • view change request • start, update and submit a rule 9.4 report 	<ul style="list-style-type: none"> • view and update “draft” accreditation application • create, update, view brand and brand participation • create, update and view software product • manage production certificate, authentication and endpoint details • submit CTS enrolment form • manage CTS certificate, authentication and endpoint details 	<ul style="list-style-type: none"> • view registration • create, update, view brand and brand participation • manage production certificate, authentication and endpoint details • submit CTS enrolment form • manage CTS certificate, authentication and endpoint details
------------------------------	---	--	---	---	---

Legal authority contact		<ul style="list-style-type: none"> • manage own profile • view users list 	<ul style="list-style-type: none"> • view organisational details • view and accept agreements • view change request 	<ul style="list-style-type: none"> • view accreditation application • view brand and brand participation • view software product • view production certificate, authentication and endpoint details • Notify CDR representative arrangement (unrestricted ADR) • Notify CDR sponsorship arrangement (unrestricted ADR) 	<ul style="list-style-type: none"> • view registration • view brand and brand participation • view production certificate, authentication and endpoint details
--------------------------------	--	---	--	--	---

Authorised CTS tester	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"> • manage own profile • view users list 	<ul style="list-style-type: none"> • view organisational details • view agreements 	<ul style="list-style-type: none"> • view brand and brand participation • view software product • submit CTS enrolment form • view and update CTS authentication and endpoint details • view CTS certificates 	<ul style="list-style-type: none"> • view brand and brand participation • submit CTS enrolment form • view and update CTS authentication and endpoint details • view CTS certificates
------------------------------	--	---	--	--	---

15 Non-Prod Participant Portal Access

There are two methods of providing participant-level access to the RAAP. The first includes having another user with access to your chosen organisation provide you access as outlined [Managing users in the Participant Portal](#).

The second method is via the Staff Portal which can be completed by following the below steps:

1. Log into the Staff Portal
2. Select the organisation you would like to access via the Participant Portal

The screenshot shows the Dynamics 365 RAAP Staff Portal interface. The left sidebar has the 'Organisations' tab selected. The main area displays a table of organisations. The table has columns: Name, Organisation Type, Main Phone, Registered Business, Primary Contact, Email (Primary Contact), PBC, and PTC. The 'ATF Grimes, Lewis and Hamilton' organisation is highlighted in blue.

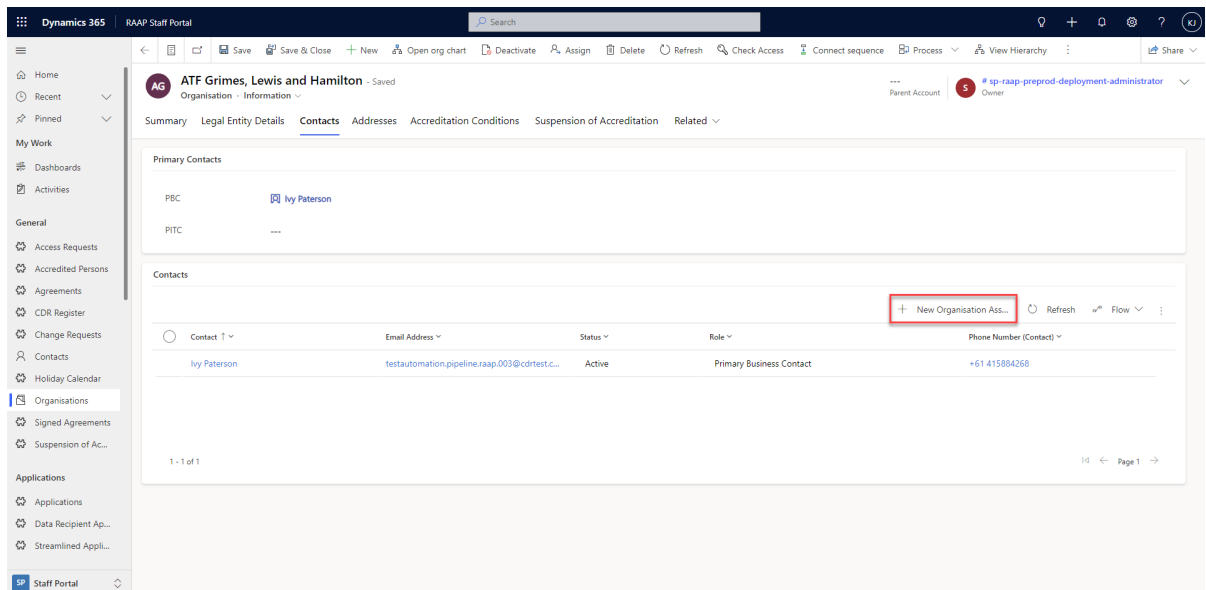
Name	Organisation Type	Main Phone	Registered Business	Primary Contact	Email (Primary Contact)	PBC	PTC
PATERSON ARCHITECTS PTY LTD	Legal Entity				Henry Reid		
BARCLAY HOLDINGS PTY LTD	Legal Entity				Henry Reid		
PDBN 05092023 korbiz2qkv	Business Name						
GOLDENSTATE ENTERPRISES PTY LTD	Legal Entity				Henry Reid		
ATF Leffer - Tillman	Legal Entity				Christian Kunde		
ATF Jones - Marvin	Legal Entity				Christian Kunde		
ATF Borer Corp	Legal Entity				Ivy Paterson		
ATF Abbott, Turcotte and Beatty	Legal Entity				Harrison Weber		
ATF Grimes, Lewis and Hamilton	Legal Entity				Ivy Paterson		
ATF Quigley - O'Connell	Legal Entity				Harrison Weber		
ATF Windler and Sons	Legal Entity				Christian Kunde		
PDBN 16082023 id7ztk868f	Business Name						
ATF Greenfelder - Bode	Legal Entity				Ivy Paterson		
NEWTON PTY, LIMITED	Legal Entity				Luca Christiansen		
ATF Lockman and Sons	Legal Entity				Ivy Paterson		
Auto Love, Schultz and Klein 08312023	Business Name						
ATF Greenholt - Hahn	Legal Entity				Harrison Weber		

3. Select the Contacts tab

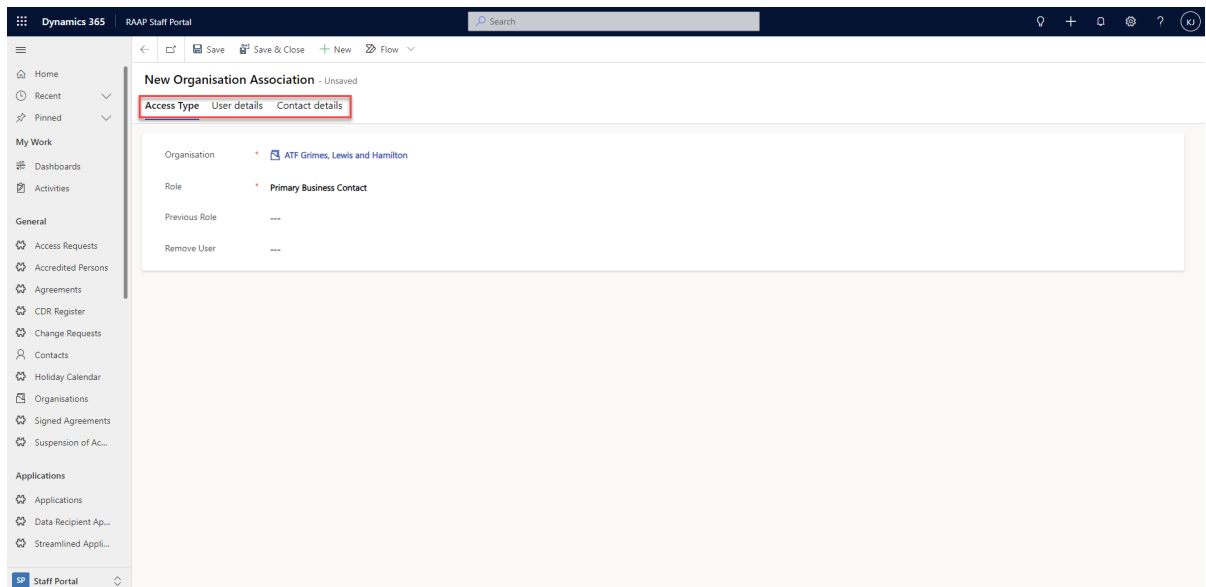
The screenshot shows the Dynamics 365 RAAP Staff Portal interface. The left sidebar has the 'Organisations' tab selected. The main area displays the 'ATF Grimes, Lewis and Hamilton' organisation details. The 'Contacts' tab is selected in the top navigation bar. The 'Organisation Details' section shows information about the organisation, including Account Name, Entity Type, Organisation Type, Industry, Registered in Australia, Foreign Entity, ACN, Business Registration Number, Country of Registration, Electronic Address for Service, ADI Indicator, and Energy Retailer. The 'Timeline' section on the right shows a list of events, including email notifications and system messages.

Account Name	Entity Type	Organisation Type	Industry	Registered in Australia	Foreign Entity	ACN	Business Registration Number	Country of Registration	Electronic Address for Service	ADI Indicator	Energy Retailer
ATF Grimes, Lewis and Hamilton	---	Legal Entity	---	No	Yes	---	233024122	Laos, People's Democratic Republic	testautomation.pipeline.raap.003@cdrtest.com.au	No	No

4. Select "+ New Organisation Association"



5. Fill out the following tabs: Access Type, User Details and Contact Details



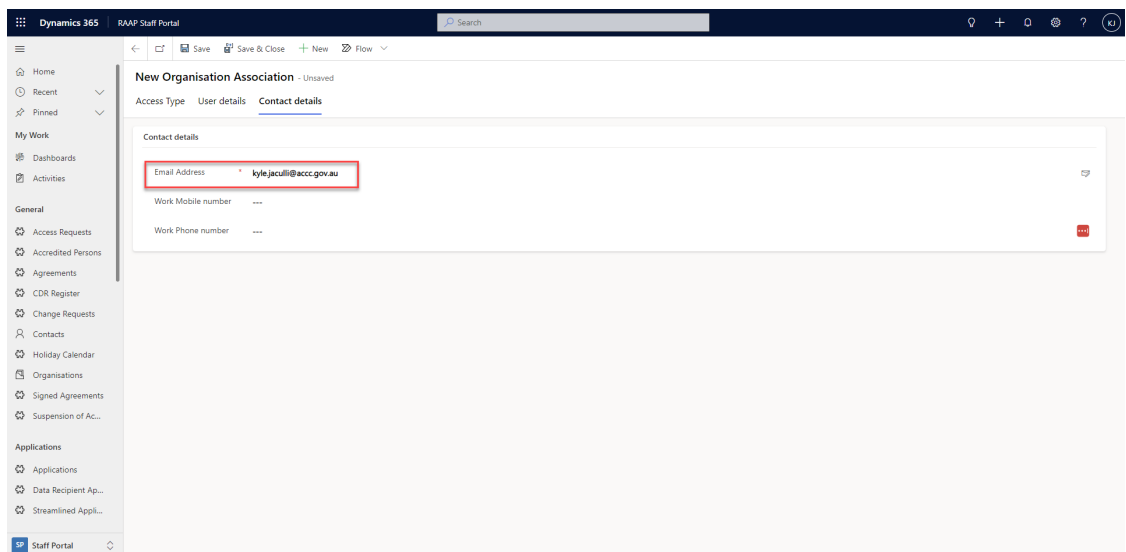
- Access Type: Select the role required for your testing

The screenshot shows the Dynamics 365 RAAP Staff Portal interface. The left-hand navigation pane includes sections for 'My Work' (Dashboards, Activities), 'General' (Access Requests, Accredited Persons, Agreements, CDR Register, Change Requests, Contacts, Holiday Calendar, Organisations, Signed Agreements, Suspension of Ac...), and 'Applications' (Applications, Data Recipient Ap..., Streamlined Appli...). The main content area is titled 'New Organisation Association - Unsaved' and has three tabs: 'Access Type', 'User details', and 'Contact details'. The 'Access Type' tab is active, showing a form with the following fields: 'Organisation' (set to 'ATF Grimes, Lewis and Hamilton'), 'Role' (set to 'Primary Business Contact' and highlighted with a red box), 'Previous Role' (set to '---'), and 'Remove User' (set to '---').

- b. User Details: Input the Inviter (In non-production environments you can press enter and select the first option), your first name and last name.

The screenshot shows the Dynamics 365 RAAP Staff Portal interface. The left-hand navigation pane is the same as in the previous screenshot. The main content area is titled 'New Organisation Association - Unsaved' and has three tabs: 'Access Type', 'User details', and 'Contact details'. The 'User details' tab is active, showing a form with the following fields: 'Job Title' (set to '---'), 'Salutation' (set to '---'), 'Inviter' (set to 'asa bht' and highlighted with a red box), 'First Name' (set to 'Kyle'), 'Middle Name' (set to '---'), 'Last Name' (set to 'Jaculli'), and 'Contact' (set to '---').

- c. Contact Details: Input your email address



Dynamics 365 RAAP Staff Portal

New Organisation Association - Unsaved

Access Type User details **Contact details**

Contact details

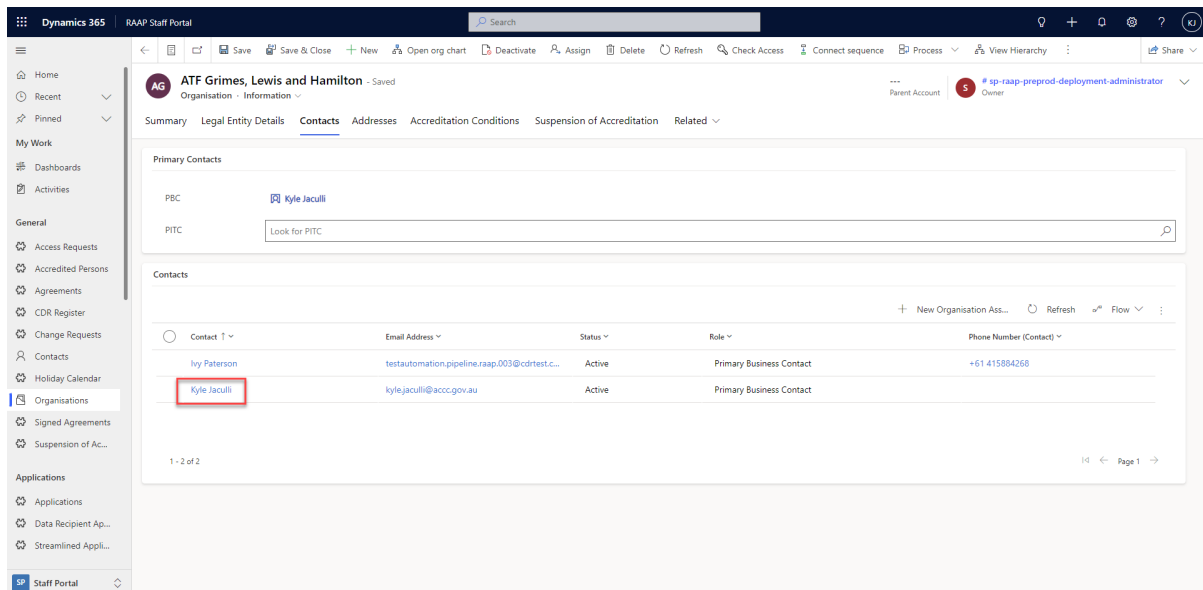
Email Address * kyle.jaculli@acc.gov.au

Work Mobile number ---

Work Phone number ---

6. Save and close

7. Click on the newly created account



Dynamics 365 RAAP Staff Portal

ATF Grimes, Lewis and Hamilton - Saved

Organisation - Information

Summary Legal Entity Details **Contacts** Addresses Accreditation Conditions Suspension of Accreditation Related

Primary Contacts

PBC KYLE JACULLI

PITC Look for PITC

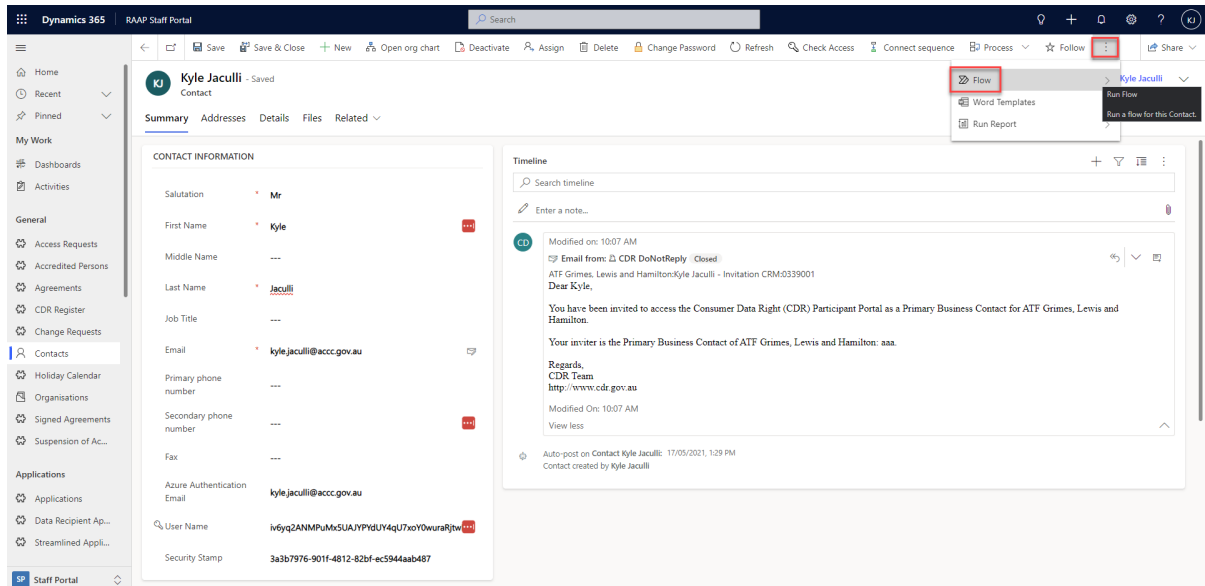
Contacts

Contact	Email Address	Status	Role	Phone Number (Contact)
Ivy Paterson	testautomation.pipeline.raap.003@cdtest.c...	Active	Primary Business Contact	+61 415884268
Kyle Jaculli	kyle.jaculli@acc.gov.au	Active	Primary Business Contact	

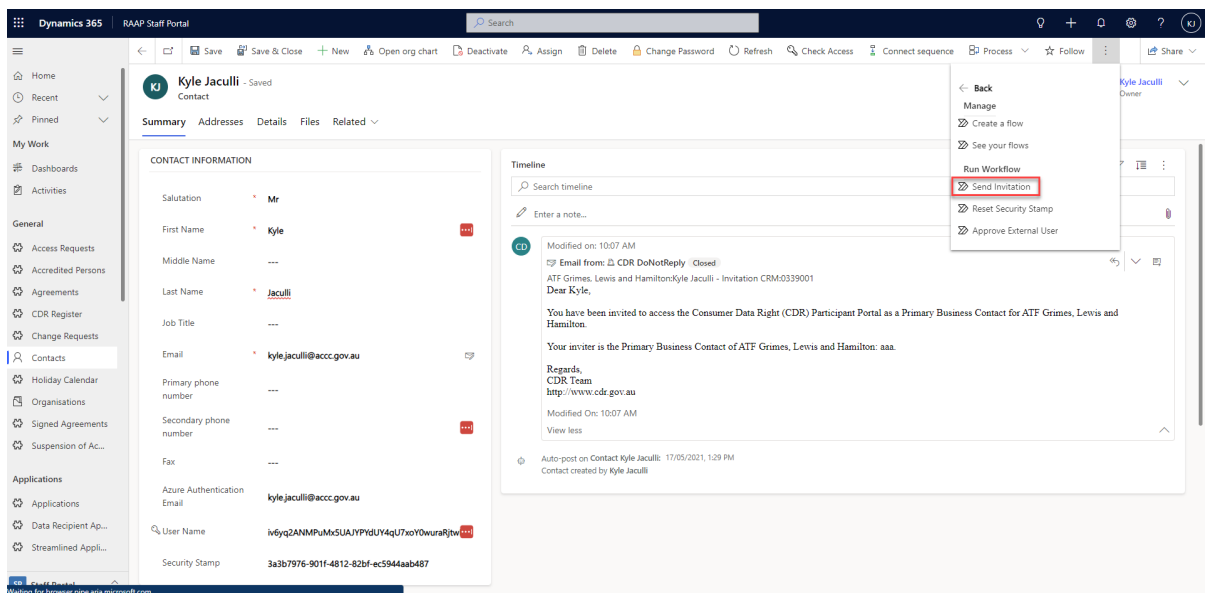
1 - 2 of 2

Page 1

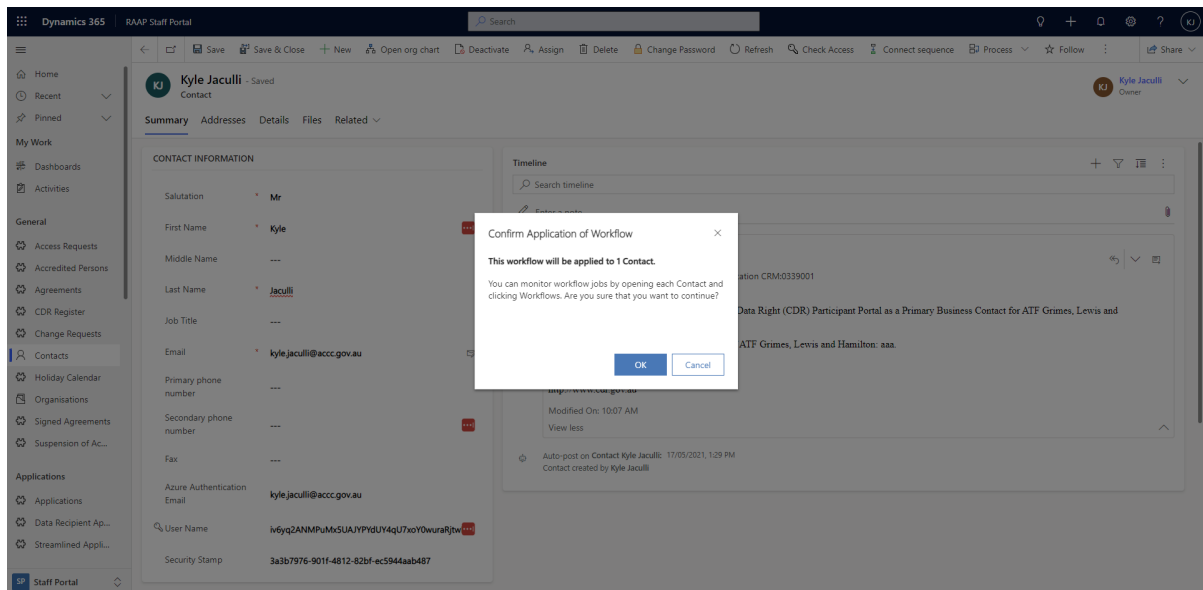
8. Select the ... in the top right and select Flow in the drop-down menu



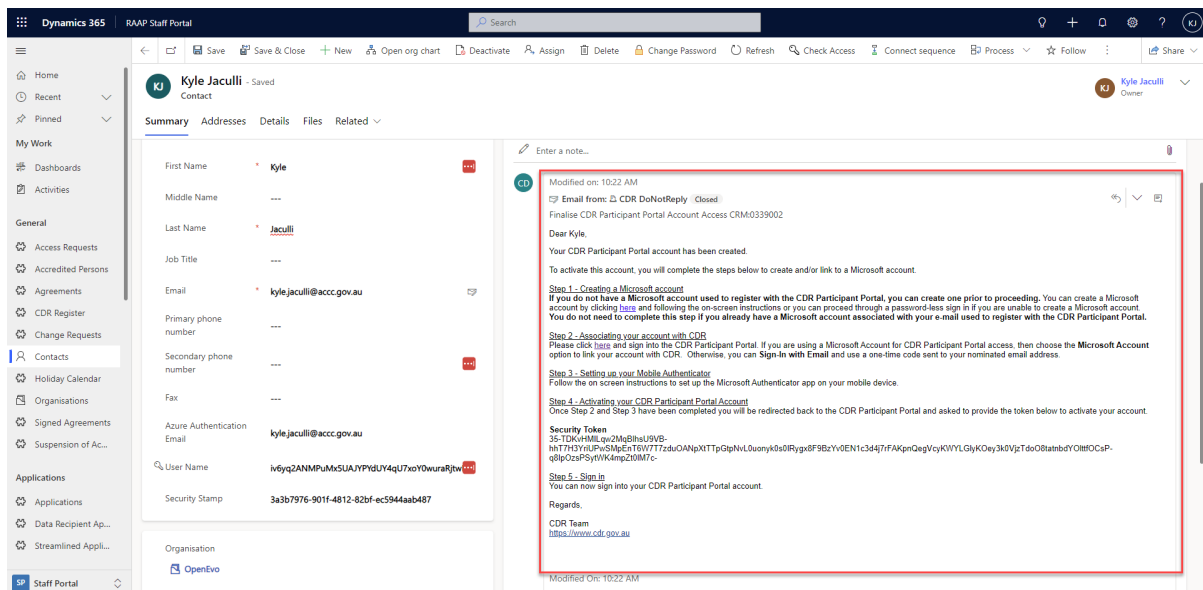
9. Select Send Invitation



10. Select OK



11. After a refresh, you should see an email in the Notes frame which provides instructions on how to log in to the Participant Portal and your security token



12. Follow the log in process [Logging into the Participant Portal](#)

16 Schedule 1 reporting

Schedule 1 reports can be completed and lodged on the Participant Portal so that accredited data recipients can report annually to the ACCC, as the Accreditor, on their ongoing compliance with the information security obligations in Schedule 2 to the CDR Rules. The requirements relating to this reporting are contained in Schedule 1 to the CDR Rules. Schedule 1 requires accredited persons to provide either an 'attestation statement' or an 'assurance report' each year starting with the provision of an attestation statement.

The reporting process on the Participant Portal allows participants to:

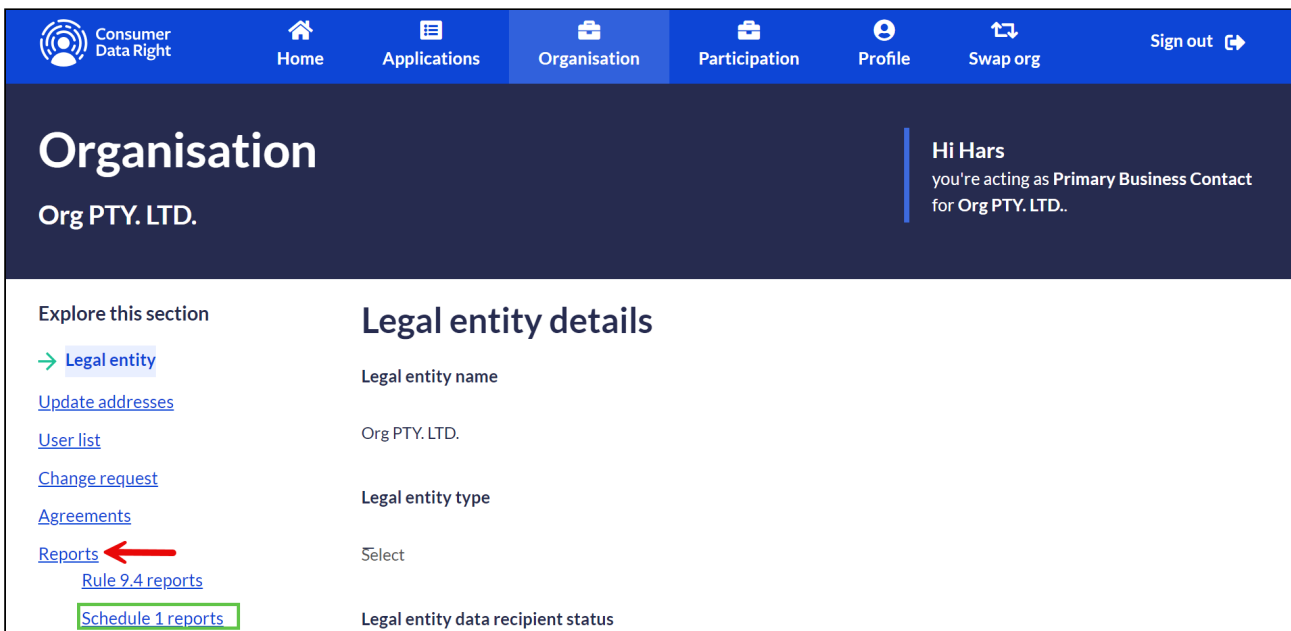
- Start, edit, and submit a report any time that are due;
- View and download a report in any status;
- Receive email reminder about upcoming due date and overdue reports.

16.1 Lodging a Schedule 1 report on the Participant Portal

As an accredited data recipient, you can start, edit and submit a Schedule 1 Attestation statement and Assurance report based on your reporting year on the Participant Portal by following the below steps:

16.1.1 Start and submit a Schedule 1 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>Schedule 1 reports** from the left side navigation pane.



The screenshot shows the Participant Portal interface. At the top is a blue navigation bar with icons and labels for 'Consumer Data Right', 'Home', 'Applications', 'Organisation' (selected), 'Participation', 'Profile', 'Swap org', and 'Sign out'. Below this is a dark blue header area with 'Organisation' and 'Org PTY. LTD.' on the left, and a user profile 'Hi Hars' on the right stating 'you're acting as Primary Business Contact for Org PTY. LTD.'. The main content area is divided into two sections. On the left, 'Explore this section' lists links: 'Legal entity' (with a right arrow), 'Update addresses', 'User list', 'Change request', 'Agreements', 'Reports' (with a red left arrow), 'Rule 9.4 reports', and 'Schedule 1 reports' (highlighted with a green box). On the right, 'Legal entity details' shows fields: 'Legal entity name' (Org PTY. LTD.), 'Legal entity type' (Select), and 'Legal entity data recipient status'.

2. Based on your participation (accredited data recipient who has not gone through streamline application process), you will be presented with a summary view of your

Schedule 1 reporting obligation for the current reporting period and next 2 years that are not submitted.

3. Select **Start** from the Actions column. Start action is available 3 months before the due date.
4. Complete all mandatory fields, upload one or more files and select **Submit**.
5. Upon submission, a confirmation message will be shown and record will move to historical page.

16.1.2 View a submitted Schedule 1 Historical report

A primary business contact, authorised business contact, primary IT contact or an authorised IT contact can view the submitted reports by following the below steps:

1. Log in to the Participant Portal at <https://portal.cdr.gov.au> and select **Organisation** from the top navigation menu, then **Reports>Schedule 1 reports** from the left side navigation pane.
2. Select **View historical schedule 1 reports** to view reports that are submitted in the past.
3. Select **View** from the Actions column.
4. View all submitted details including files uploaded.
5. Click on the file name to download a copy of the report.

16.1.3 Edit a submitted Schedule 1 Historical report

A primary business contact, authorised business contact, primary IT contact or an authorised IT contact can edit a submitted reports by following the below steps:

1. Log in to the Participant Portal at <https://portal.cdr.gov.au> and select **Organisation** from the top navigation menu, then **Reports>Schedule 1 reports** from the left side navigation pane.
2. Select **Edit** from the Actions column for the record that is in 'Information required' status.

The screenshot shows the 'Organisation' page in the Participant Portal. The top navigation bar includes links for Home, Applications, Organisation (selected), Participation, Profile, Swap org, and Sign out. The main header displays 'Organisation' and the user's name 'Hi Hars' with the role 'you're acting as Primary Business Contact for'. The left sidebar lists various sections under 'Explore this section', including 'Legal entity', 'Update addresses', 'User list', 'Change request', 'Agreements', 'Reports' (with a sub-link for 'Rule 9.4 reports' and a highlighted 'Schedule 1 reports'), 'CDR sponsorship arrangement', and 'Surrender accreditation'. The main content area is titled 'Reporting overview' and 'Schedule 1 reports'. It features a table with columns: Report type, Reporting year, Reporting period, Due date, Status, and Actions. The table lists three reports: an 'Assurance report' for 2024 with status 'Information Required' and an 'Edit' button highlighted in green; an 'Attestation statement' for 2025 with status 'Not Started' and a 'Start' button; and another 'Assurance report' for 2026 with status 'Not Started'. A button 'View historical Schedule 1 reports' is also present.

Report type	Reporting year	Reporting period	Due date ↑	Status	Actions
Assurance report	1 Jan 2024 - 31 Dec 2024	Calendar year	30/09/2024	Information Required	View Edit
Attestation statement	1 Jan 2025 - 31 Dec 2025	Calendar year	30/09/2024	Not Started	Start
Assurance report	1 Jan 2026 - 31 Dec 2026	Calendar year	31/03/2027	Not Started	

3. Upload additional documents and comments if required. User can view previous comments and files uploaded.
4. Click on the file name to download a copy of the report that was uploaded in the past.
5. Click on submit to provide the updated report.

Consumer Data Right

Home
Applications
Organisation
Participation
Profile
Swap.org
Sign out

Organisation

Hi Hars
you're acting as Primary Business Contact for

Explore this section

- [Legal entity](#)
- [Update addresses](#)
- [User list](#)
- [Change request](#)
- [Agreements](#)
- [Reports](#)
- [Rule 9.4 reports](#)
- [Schedule 1 reports](#)
- [CDR sponsorship arrangement](#)
- [Surrender accreditation](#)

Assurance report

Reporting year
1 Jan 2024 - 31 Dec 2024

Reporting period
Calendar year

Report due date
30/09/2024

Comments (optional)

Documentation report attached - updated files

43 of 2000 characters

Uploaded documents

7 minutes ago
Hars Kand

Guidance for unrestricted accredited persons for preparing an attestation statement (1).docx (58.76 KB)

Upload supporting documents *

Choose Files
Guidance for ...atement.docx

Submit

Consumer Data Right

[Contact us](#)
[Resources](#)
[Privacy](#)
[Accessibility](#)

[Disclaimer and copyright](#)
[Terms and conditions](#)