

Scheme participant enhancements

We have made new functionality available in Tessa for Scheme Participants. A Scheme Participant is now able to complete annual statements for ESS and PDRS and individual liable demand for PDRS.

The following will outline some of the key features you will see on the home screen and in the new forms. If you require further information, please refer to our Scheme Participant Compliance Guide using this **link** or access our TESSA knowledge articles.

When you log in to your Tessa account, you will now see three new forms on the Tessa account homepage.

My Certificates	My Liabilities	My Products
Raise a Case		
Application for Product Acceptance Apply to have products accepted under the ESS or PDRS schemes Raise a Case	Voluntary Surrender Certificates Surrender certificates voluntarily under the ESS or PDRS schemes Raise a Case	Application for Accreditation Apply to become an Accredited Certificate Provider Raise a Case
Individual Liable Demand Submit early PDRS Peak Liability Data Raise a Case	PDRS Annual Statement Submit PDRS Annual Statement <u>Raise a Case</u>	ESS Annual Statement Submit ESS Annual Statement Raise a Case
	Transfer Certificates Transfer certificates from your organisation to another Raise a Case	New forms now available for scheme participants

As you open each of the three forms, the following will occur:

- the requestor details on the form will prefill with your organisation details.
- a red Asterix will appear next to each mandatory field, and
- a required information panel will appear to the right, it outlines all the information that must be completed before the form can be submitted.

Individual Liable Demand	Submit
Appears next to mandatory fields	Submit
Indicates required	
Organisation details will auto populate	
Requestor Details	Required information
* Organisation Name V Organisation ID	Choose your Liability Period
Scheme Participant Test in Dev instance v . ACCT0001497	Select the auditor group who performed the work Acknowledgment
* Contact Name	t
Scheme Participant Test in DEV instance + .	Information must be provided before the form can be submitted
* Choose your Liability Period 😧 Scheme	
v PDRS]
PDRS Liability Data Inputs	

As you provide each of the mandatory items, it will automatically disappear from the required information panel.

0	
Audit Details	Submit
* Was this submission audited?	
Yes 🔹	
*Select the auditor group who performed the work	Required information Choose your Liability Period
Acknowledgment	Select the auditor group who performed the work
Acknowledgment Text O I have uploaded to this case our signed Declaration of Liable Acquisit	 Once the acknowledgment is completed it will no longer appear in the required information panel

If you attempt to submit any of the three forms prior to providing all the required information a red validation error will appear at the top of the screen.



All three forms contain informational text on most of the fields. If you see a question mark icon to the right of the field name, you can hover, click, or tap on the icon to display additional information.

* Contact Name	
Scheme Participant Test in DEV instance 🔹 🔹	
* Choose your Liability Period 💽 e.g. for the 2022-2023 year choose	Scheme
2023'	PDRS
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On all three forms, the **Choose your Liability Period** field will only contain a list of liability periods that are open for submission. If the liability period year does not appear in the drop down, then a submission cannot be made for that liability period.

* Choose your Liab	oility Period 🚱			
		A		
		٩		
2021	ESS		-	Only liability periods open for submission will appear
2022	ESS			ior submission will appear
2023	ESS			