Online Reporting Platform (ORP)

Complete Engagement Documentation

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[Complete Engagement Documentation 1](#_Toc201651645)

[Audience 1](#_Toc201651646)

[Pre-requisites 1](#_Toc201651647)

[Email notifications 1](#_Toc201651648)

[Support 1](#_Toc201651649)

[Part 1: Navigate to Engagement Documents 2](#_Toc201651650)

[Part 2: Complete Conflict of Interest 4](#_Toc201651651)

[Part 3: Complete Commitment Letter 6](#_Toc201651652)

[Part 4: Complete Deed of Confidentiality 8](#_Toc201651653)

[Part 5: Complete Contract 11](#_Toc201651654)

[Part 6: Verify completion 14](#_Toc201651655)

# Complete Engagement Documentation

This guide demonstrates how a Candidate completes Engagement Documentation.

You are an active Candidate in the ORP Gateway Reviewer Portal (GRP); have been approved to participate in a Gateway Review; and received notification from the ORP to complete Engagement Documentation.

## Audience

* Review Team Leader
* Review Team Member

## Pre-requisites

* Initial Attestation complete
* Gateway Unit Analyst issued instruction to complete documents

## Email notifications

You may receive email notifications from Shibumi related to this process. To avoid missing communications flag Shibumi as a trusted sender in your email application.

## Support

For support email [gateway.helpdesk@dtf.vic.gov.au](mailto:gateway.helpdesk@dtf.vic.gov.au).

## Part 1: Navigate to Engagement Documents

|  |  |
| --- | --- |
| Step | What to Do |
|  | Did you access **Summary** screen via link in within ORP?   |  |  | | --- | --- | | **Yes** | Proceed to **Part 2. Complete Conflict of Interest**. | | **No** | Go to next step. | |
|  | Login to **ORP**.  **Home Page** displays:  Picture |
| Information outline | **Home Page**  Access to the home page is managed by the Gateway Unit. If you do not see a screen like above contact a Gateway Unit Analyst. Note: Information displayed is unique to your Role, and what Projects and Gates you’re assigned to. |
| Information outline | **Show/Hide Left Navigation Menu**  Click hamburger menu, represented by three horizontal lines, top left of screen to show/hide left navigation menu. |
|  | Click: **My Gateway Review**  **My Gateway Review** screen displays:  A screenshot of a computer  AI-generated content may be incorrect. |
|  | Click: **Name**.  **Summary** screen displays:  A screenshot of a computer  AI-generated content may be incorrect. |
| Information outline | **Activity Completion Checklist**   * Activities differ based on role. * Automatically updates as forms completed. |

## Part 2: Complete Conflict of Interest

|  |  |
| --- | --- |
| Step | What to Do |
|  | In top navigation menu, click: **Conflict of Interest**  **Conflict of Interest** screen displays:  A screenshot of a computer  AI-generated content may be incorrect. |
| Information outline | **Adding and Editing data**  Hover over a panel or field and click Picture of pen / pencil.  to edit.  Where button is crossed out, this denotes fields you are not permitted to edit. |
| Information outline | **Saving data**  After clicking edit, buttons to Save or Cancel data selection and entry displays on the top right of a panel being edited.  Screen capture. Top of section displaying two buttons. Left button: Cancel. Right button: Save. |
| Information outline | **Data will be lost if not saved** before navigating to new screen or closing ORP.  ORP will prompt “There are unsaved changes.” to avoid data loss.  Once data is saved, you may navigate away from any screen or close ORP and return to continue work later. |
| Information outline | Asterisk denotes mandatory field. |
| Information outline | Where available for download, attachments are denoted by a link symbol: Dark blue, rounded horizontal rectangle, with broken top and bottom lines, surrounding a dash., Picture, Picture |
|  | Review **Conflict of Interest Declaration**. |
|  | Complete panel **Signed**. |
|  | Click: **Save** |
| Information outline | Signature auto populated based on your profile. |
|  | Are you a VPS Employee?   |  |  | | --- | --- | | **Yes** | Proceed to **Part 5: Complete Contract**. | | **No** | Proceed to **Part 3: Complete Supplier Code of Conduct Commitment Letter**. | |

## Part 3: Complete Commitment Letter

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| Step | What to Do |
|  | In top navigation menu, click: **Supplier Code of Conduct Commitment Letter**  **Supplier Code of Conduct Commitment Letter** screen displays:  **A screenshot of a computer  AI-generated content may be incorrect.** |
| Information outline | **Adding and Editing data**  Hover over a panel or field and click Picture of pen / pencil.  to edit.  Where button is crossed out, this denotes fields you are not permitted to edit. |
| Information outline | **Saving data**  After clicking edit, buttons to Save or Cancel data selection and entry displays on the top right of a panel being edited.  Screen capture. Top of section displaying two buttons. Left button: Cancel. Right button: Save. |
| Information outline | **Data will be lost if not saved** before navigating to new screen or closing ORP.  ORP will prompt “There are unsaved changes.” to avoid data loss.  Once data is saved, you may navigate away from any screen or close ORP and return to continue work later. |
| Information outline | Asterisk denotes mandatory field. |
| Information outline | Where available for download, attachments are denoted by a link symbol: Dark blue, rounded horizontal rectangle, with broken top and bottom lines, surrounding a dash., Picture, Picture |
|  | Review **Commitment to the Victorian State Government Supplier Code of Conduct**. |
|  | Complete panel **Signed**. |
|  | Click: **Save** |
| Information outline | Signature auto populated based on your profile. |

## Part 4: Complete Deed of Confidentiality

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| Step | What to Do |
|  | In top navigation menu, click: **Deed of Confidentiality**  **Deed of Confidentiality** screen displays: |
| Information outline | **Adding and Editing data**  Hover over a panel or field and click Picture of pen / pencil.  to edit.  Where button is crossed out, this denotes fields you are not permitted to edit. |
| Information outline | **Saving data**  After clicking edit, buttons to Save or Cancel data selection and entry displays on the top right of a panel being edited.  Screen capture. Top of section displaying two buttons. Left button: Cancel. Right button: Save. |
| Information outline | **Data will be lost if not saved** before navigating to new screen or closing ORP.  ORP will prompt “There are unsaved changes.” to avoid data loss.  Once data is saved, you may navigate away from any screen or close ORP and return to continue work later. |
| Information outline | Asterisk denotes mandatory field. |
| Information outline | Where available for download, attachments are denoted by a link symbol: Dark blue, rounded horizontal rectangle, with broken top and bottom lines, surrounding a dash., Picture, Picture |
|  | Review panel **1. Review Schedule 1 Details**. |
|  | Review panel **2. Review Schedule 2 (Clause 8) Details**. |
|  | Navigate to panel **3. Generate Deed of Confidentiality** |
|  | Click: **Generate Deed of Confidentiality** |
|  | Refresh browser to display generated document. |
|  | Navigate to panel **4. Download Deed of Confidentiality** |
|  | Click: **Attachment**  Deed downloads via browser to local device. |
|  | Review, sign, and scan completed deed. |
|  | Hover over panel **5. Upload Signed Deed of Confidentiality**, click: **Edit**  **Upload Signed Deed of Confidentiality** button displays: |
|  | Click: **Upload Signed Deed of Confidentiality**  **File Browser** displays: |
|  | Navigate to and select signed copy of deed. |
|  | Click: **Open**  Screen updates to display uploaded file: |
|  | Correct document uploaded?   |  |  | | --- | --- | | **Yes** | Go to next step. | | **No** | 1. Click: **Clear** 2. Repeat steps 11 - 13. | |
|  | Click: **Save** |

## Part 5: Complete Contract

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| Step | What to Do |
|  | In top navigation menu, click: **Contract**  **Contract** screen displays: |
| Information outline | **Adding and Editing data**  Hover over a panel or field and click Picture of pen / pencil.  to edit.  Where button is crossed out, this denotes fields you are not permitted to edit. |
| Information outline | **Saving data**  After clicking edit, buttons to Save or Cancel data selection and entry displays on the top right of a panel being edited.  Screen capture. Top of section displaying two buttons. Left button: Cancel. Right button: Save. |
| Information outline | **Data will be lost if not saved** before navigating to new screen or closing ORP.  ORP will prompt “There are unsaved changes.” to avoid data loss.  Once data is saved, you may navigate away from any screen or close ORP and return to continue work later. |
| Information outline | Asterisk denotes mandatory field. |
| Information outline | Where available for download, attachments are denoted by a link symbol: Dark blue, rounded horizontal rectangle, with broken top and bottom lines, surrounding a dash., Picture, Picture |
|  | Review panel **1. Review Supplier Details**. |
|  | Are Supplier details correct?   |  |  | | --- | --- | | **Yes** | Go to next step. | | **No** | 1. Navigate to section **Right click and open Reviewer Profile in new tab to update details**. 2. Right-click **Associated Reviewer**. Reviewer Profile opens in new tab. 3. Update relevant details. See user guide: **Manage Gateway Reviewer Profile**. | |
|  | Review panel **2. Review Schedule 1 Contract Details**. |
|  | Review panel **3. Review Schedule 2 Services and Price Schedule**. |
|  | Are Contract, Services, and Price details correct?   |  |  | | --- | --- | | **Yes** | Go to next step. | | **No** | Contact Gateway Unit for assistance before proceeding. | |
|  | Navigate to panel **4. Download/Upload Contract**. |
| Information outline | Your contract has been prepared by the Gateway Unit.  Where available for download, attachments are denoted by a link symbol: Dark blue, rounded horizontal rectangle, with broken top and bottom lines, surrounding a dash., Picture, Picture |
|  | Click: **Attachment**  Contract downloads via browser to local device. |
|  | Review, sign, and scan completed document. |
|  | In panel **4. Download/Upload Contract**., click: **Edit**.  **Signed - Contract** button displays: |
|  | Click: **Signed - Contract**  **File Browser** displays:  A screenshot of a computer  AI-generated content may be incorrect. |
|  | Navigate to and select scanned signed copy of your **Contract**. |
|  | Click: **Open**  Screen updates to display uploaded file: |
|  | Correct document uploaded?   |  |  | | --- | --- | | **Yes** | Go to next step. | | **No** | Click: **Clear**  Repeat steps 11 -13. | |
|  | Click: **Save** |

## Part 6: Verify completion

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| --- | --- |
| Step | What to Do |
|  | In top navigation menu, click: **Summary**  **Summary** screen displays:  A screenshot of a computer  AI-generated content may be incorrect. |
| Information outline | **Activity Completion Checklist**   * Activities differ based on role. * Automatically updates as forms completed. |
|  | Ensure all items except **Invoice** and **Survey** marked complete..  Where required item unchecked, return to that form and complete. |
| Information outline | **Next steps**  Gateway Unit Analyst reviews submission and progresses selection. |