PCAB E-FILING

Contractors Licensing and Registration System

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Foreword

The Philippine Contractor's Accreditation Board (PCAB), one of the implementing Boards of the Construction Industry Authority of the Philippines (CIAP), an attached agency of the Department of Trade & Industry (DTI) has come up with innovative ways to serve its stakeholders and clients more efficiently through the implementation of the Contractors Licensing and Registration System (CLiRS) beginning CFY 2017-2018.

With President Duterte Administration's directive to streamline government processes, CLiRS was developed to allow contractors to register and create their respective accounts as users of the E-Filing System, take online Authorized Managing Officer (AMO) examination, accomplish electronic application forms, submit license and/or registration applications, and conduct status verification of filed applications, among others.

This User's Manual was prepared for better understanding of the step by step procedure in the online filing of PCAB licensing and registration applications.

15 June 2017

User related Account

What is PCAB E-Filing?

PCAB has come up with innovative ways to serve its stakeholders and clients more efficiently through the implementation of the Contractors Licensing and Registration System (CLiRS) beginning CFY 2017-2018.

CLiRS has an on-line interface which is accessible through the CIAP website www.ciap.dti.gov.ph by clicking the CIAP Portal under the Programs and Services menu. The application system will allow contractors to register and create their respective accounts as users of the E-Filing System, take online Authorized Managing Officer (AMO) examination, accomplish electronic application forms, submit license and/or registration applications, and conduct status verification of filed applications, among others.

Before accessing the system, you must have the following: a stable internet connection, Mozilla Firefox 30/Google Chrome 35, a minimum screen resolution at 1024 x 768 and a valid user account.

Getting a User Account

1. Go to CIAP website:

www.ciap.dti.gov.ph

2. Click Programs and Services > Click Online Services > Click CIAP Portal

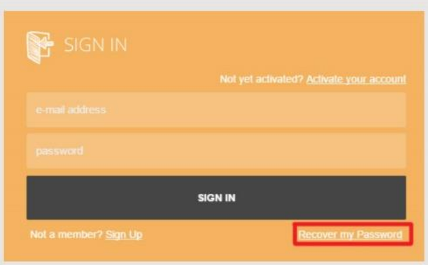
3. Sign-Up and Register

Make sure that all fields/information are completely filled out.

4. For account type, select **Contractor.**

5. Once done, a verification message displays if registration is successful. Check your Email for account verification.

Resetting a Forgotten Password



1. Access the CIAP Portal from the CIAP Website

2. Click on Forgot Password

3. Enter the email address you used to register in the portal then click submit.

4. Check your Email inbox for your new password. Use your new password to access your account in your CIAP Portal.

Changing your Password

1. Click user icon on the header.

2. Click the Change Password Tab.

3. Enter your Current Password.

4. Enter your New Password.

5. Enter Confirm Password.

6. Click the Save button.

Updating your Profile

You can only upload/update your photo.

1. Click user icon on the header.

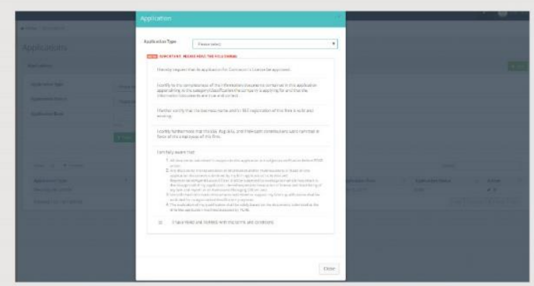
2. Click Profile.

3. Click Change Photo then upload your photo.

Licenses, Registration & Amendments

Applying for Licenses, Registrations, & Amendments

The CIAP Portal can process 20 types of application transactions. There are corresponding required pieces of information for each type of application. Each application process differs in the required screening processes. You cannot submit your application until all required fields are filled up.



1. Sign in to your account. Dashboard will appear afterwards.

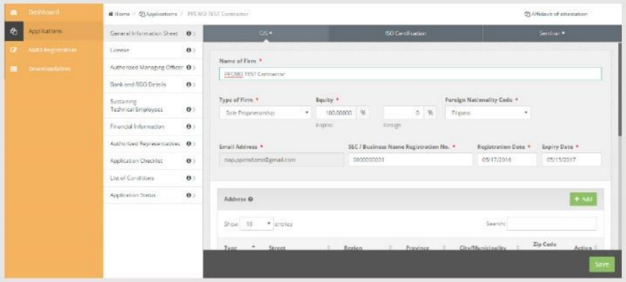
2. Click PCAB Local Registration, then **Applications** found on the left side of the window.

3. Click the **Add** button found on the right side of the page.

4. Select your **Application Type** from the drop down box. Note: Other application types may require a License Number, such as the Renewal of Regular License. Enter your five digit license number, if required. If you have only four digits, add 0 before your number.

5. Tick the checkbox of the Terms and Conditions. Click **Proceed** afterwards.

General Information Sheet



1. General Information Sheet will be displayed after clicking Proceed.

2. Select fields and enter information as necessary.

3. Make sure to click the **Save** button before moving on to the next tab. A dialog box will appear stating that record has successfully been saved.

4. Continue entering information in the following modules such as License, Authorized Managing Officer, etc.

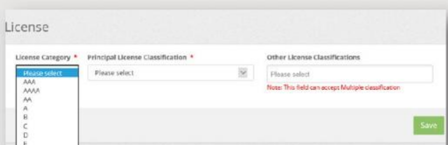
License

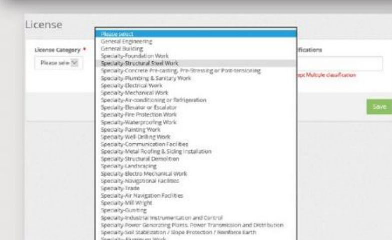
1. Click the License Tab.

2. Choose your License category from the drop down box.

3. Choose your Principal License classification. Then, if applicable, enter other license classifications.

3. Click the Save button.





NOTE: License Category and License

Classifications will and should be based on the *Categorization-Classification Table* to be seen / downloaded in the CIAP Website.

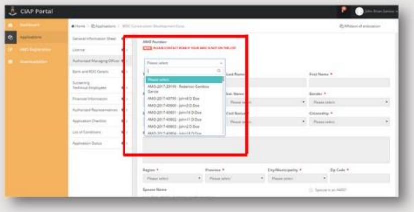
Authorized Managing Officer

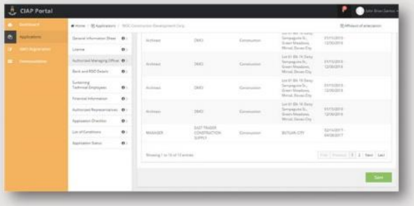
Authorized Managing Officer (AMO) is the one who represents or manages the company/firm. The nominated AMO is a senior executive in the firm and has at least two years of experience in implementing a construction project in a managerial/ supervisory capacity.

Adding your Authorized Managing Officer (AMO)

1. On your application page, click Authorized Managing Officer

2. Click the drop down, and browse, then click the name of your nominated AMO. (AMO's information will appear on the screen, it cannot be edited)





NOTE. Please make sure that you have registered your AMO and that they have attended the 2-Day AMO seminar.

3. Click the Save button.

4. Click the General Information Sheet, then click Seminar.

5. Your AMO's attended seminars will automatically appear. If not, click Synchronize. If the seminars still did not appear, contact PCAB.

If you cannot find your AMO in the drop down box. Register your AMO by clicking the AMO registration on the left side of the screen.

Registering your AMO

You must have a role of Contractor to file for an AMO registration.

1. Upon logging into the CIAP Portal, click AMO registration and complete all the necessary personal information.

2. After filling up all the required information, make sure to click the **Save** button before heading to the next tab.

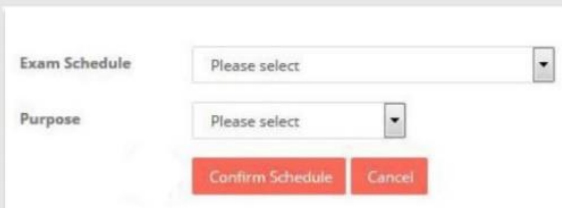
3. Complete all other tabs (Educational attainment, Work experience, etc.)

Editing an AMO Application

1. Login your user account into the CIAP Portal.
2. Click on AMO Registration link on the menu bar. Personal Information displays.
3. Edit Fields as Necessary.
4. Click on Save Button.

Scheduling an AMO Examination

1. Upon logging in to CIAP portal, click on AMO Registration link on the menu bar. Personal Information displays.
2. Click on AMO Examination tab.
3. Select an exam schedule and purpose.
4. Click on Confirm Schedule button.



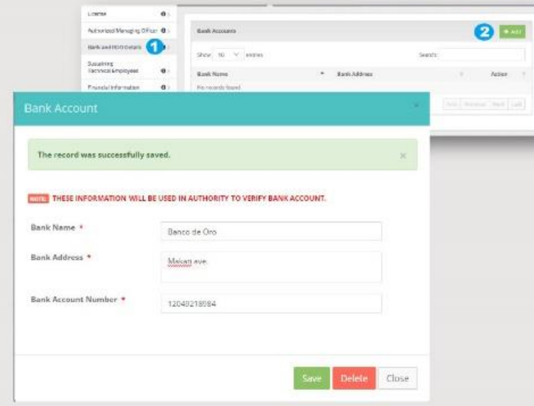
Practicing an AMO Examination

1. Upon logging in to CIAP portal, click on AMO Registration link on the menu bar. Personal Information displays.
2. Click on AMO Examination tab.
3. Click on Start Practice Exam button. AMO Examination window displays.
4. Answer the questions.
5. Click X button to close the window.

Bank and RDO Details

Here you can add the information of your company/firm's bank account/s.

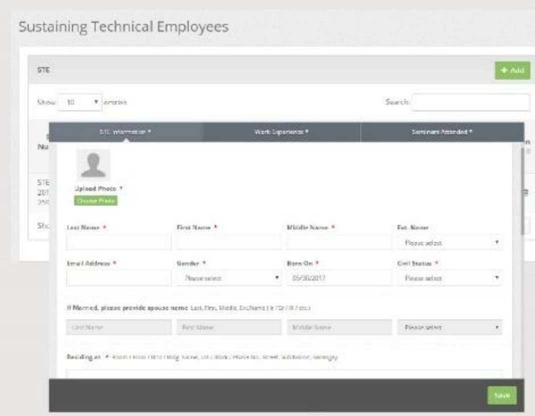
1. Click on Bank and RDO details
2. Click the Add Button
3. Bank Account Information form will display
4. Select field and enter information as necessary.
5. Click the Save button.



Sustaining Technical Employees

Sustaining Technical Employee (STE) is a licensed technical professional with at least three years of experience. They can be an engineer, architect, etc.

Adding your Sustaining Technical Employee (STE)



1. Click the Sustaining Technical Employee tab.
2. To check if your STE is connected to other firms, choose Yes then enter the required information. Click the Check button afterwards. Otherwise, click No.
3. Click Proceed button.
4. Provide all the required personal information by the system.

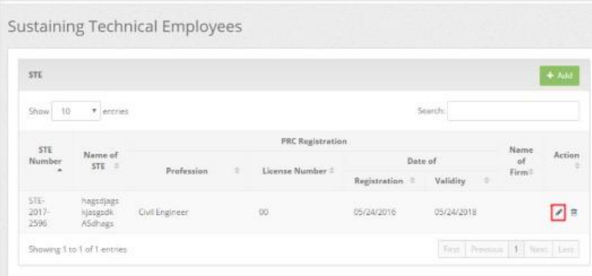
Editing your STE

1. Click Sustaining Technical Employees

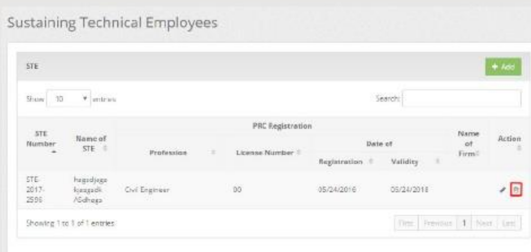
2. Find the name of the STE you want to edit, then click the Pencil Icon beside it. (STE page will be displayed)

3. Edit all the information you need to change.

4. Click Save button.



Deleting your STE



1. Click Sustaining Technical Employees

2. Find the name of the STE you want to delete, then click the trash icon beside it.

Adding your STE's attended seminar/s

1. Click Sustaining Technical Employees

2. Find the name of the STE that has attended the Construction Safety & Health (COSH) seminar. Click the pencil icon beside it.

3. Click the Seminars Attended.

4. Click the Synchronize button to display the seminar/s attended.

5. If an error is displayed after clicking the Synchronize button, please contact PCAB.

Statement of Annual Value of Work Accomplished

The Statement of Annual Value of Work Accomplished (SAVWA) must be accomplished by the applicant to support its claim of revenue and the experience of its Sustaining Technical Employees.

1. Click the Statement of Annual Value of Work Accomplished tab.

2. Click Add button at the upper right of the screen.

3. Select field and enter information as necessary.

4. Click the Save button.

Financial Information

Financial Information shows what the net income of the firm is at a given/entered period. It consists of Audited Financial Statement, Fixed Assets, Real Properties, and Schedules.

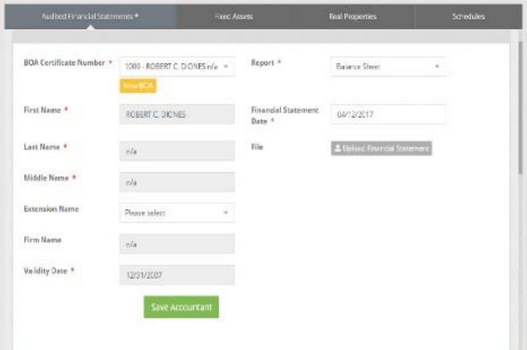
Downloading the templates

1. Click the Downloadables on the left side of the screen.

2. Download the following templates: Financial Statement, Inventories, Construction Equipment, Real Properties, Receivables and Transportation Equipment.

3. Open the file with Excel then after filling up the templates with your information, click Save.

Adding your BOA



1. Click the Financial Information tab.

2. Under the Accountant Details, you can choose your BOA from the drop down box. If you cannot find the name of your BOA, click the New BOA.

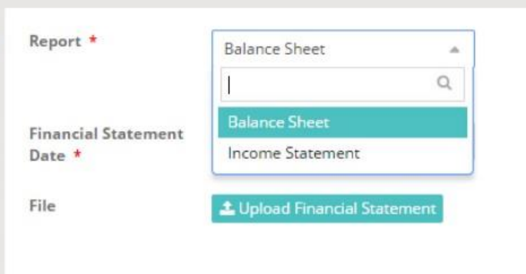
3. Click the Save Accountant button afterwards.

Adding your Financial Statement

1. After saving the accountant details, enter your Financial Statement date on the opposite side.

2. Click the Upload Financial Statement button

3. Click the Choose File button on the pop up window to select your file. The file used should be the one from the Downloadables section of the system which is an XLS file.



4. Click Upload after selecting your file. "Financial Information has been saved" should be displayed.

5. Scroll down the page to view the contents of your Balance Sheet or by clicking the View Balance Sheet button.

6. To upload your Income Statement, click the drop down box beside Report and choose Income Statement.

7. Enter your Financial Statement date.

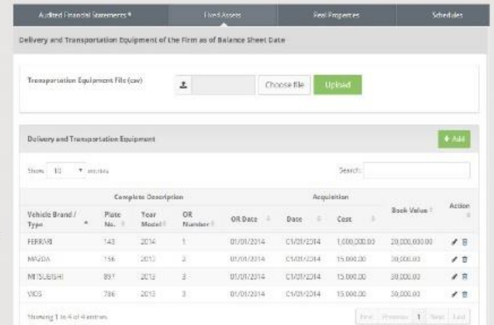
8. Repeat steps 2-4

Adding your Fixed Assets

1. From the Audited Financial Statements, click the Fixed Assets tab.

2. Under the Delivery and Transportation Equipment part, click the Choose File button. The Transportation Equipment file used should be the one from the Downloadables section of the system which is a CSV file.

3. Click the Upload button afterwards. A summary of records should be displayed



4. Scroll down and under the Machineries / Plants and other Construction Equipment part, repeat steps 2 and 3 to upload your Construction Equipment file.

Adding your Real Properties

1. Click the Real Properties tab.

2. Under the Real Properties part, click the Choose File button. The Real Properties file used should be the one from the Downloadables section of the system which is a CSV file.

3. Click the Upload button afterwards. A summary of records should be displayed after uploading.

Adding your Schedules

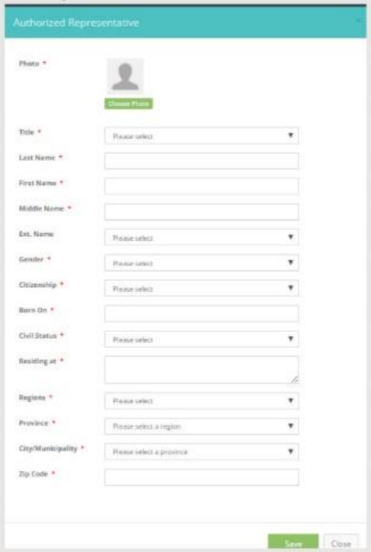
1. Click the Schedules tab.

2. Under the Receivables part, click the Choose File button. The Receivables file used should be the one from the Downloadables section of the system which is a CSV file.

3. Click the Upload button afterwards. A summary of records should be displayed after uploading.

4. Scroll down and under the Inventories part, repeat steps 2 and 3 to upload your Inventories file.

Authorized Representatives



1. Click the Authorized Representatives tab.

2. Click the Add button.

3. Select field and enter information as necessary.

4. Click the Save button afterwards.

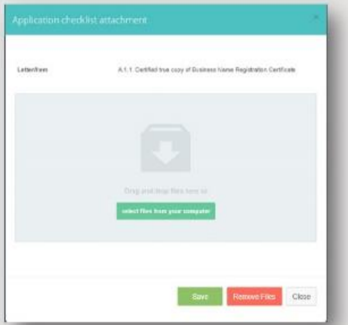
5. If there is a need to edit/update the information of an Authorized Representative, click the pencil icon. If you need to delete an Authorized Representative, click the trash icon.

Application Checklist

1. Click the Application Checklist tab.

2. Items with a Required ( ) icon must be answered with a Yes.

3. A folder ( ) icon is where you can attach supporting documents if the item is applicable to your firm/company. To attach a document, click the icon then in the pop up window, click the Add button. The folder will turn to color green ( ) once your have successfully uploaded your attachment. Please make sure that the file you are uploading is not editable (ex. PDF, JPG, PNG) and that you enter a description of the file before saving it.



4. Items with a For Compliance ( ) icon can be answered with either a Yes or N/A.

5. Double check after finishing the checklist as the system will not accept your application if you have answered No in any of the items.

List of Conditions

This contains additional requirements requested by the Technical Evaluator and/or Financial Evaluator.

1. Click on List of Conditions Tab.

2. For each condition, click the folder icon. The conditions window displays. The lower portion of the window displays the attachments for the condition. You may add one or more attachments.

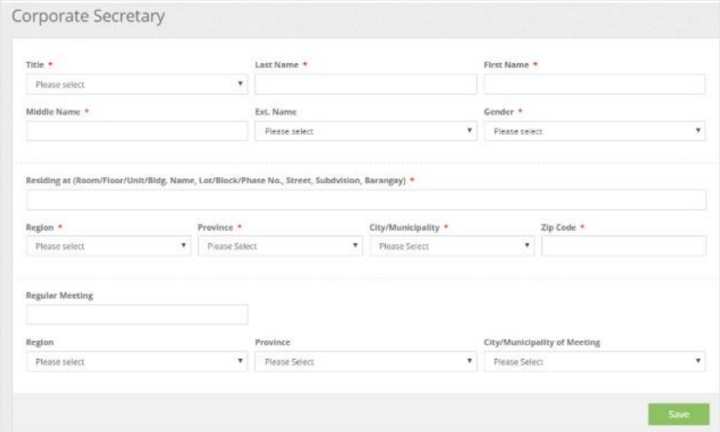
3. Click on Add Attachment button. Follow the same steps when attaching files under Application checklist.

Corporate Secretary

1. Click the Corporate Secretary tab.

2. Select field and enter information as necessary.

3. Click the Save button afterwards.



Application Status

This will show the status of your application. If you haven't submitted your application status, it will be labeled as draft and not yet submitted in the date submitted part. If you submitted your application, it will be labeled as for *Initial Processing.*

1. Click the Application Status tab.

2. Click Submit button.

3. Click the Print button to print the hard copy of your system generated application form.