

EMVO Guiding Matrix for OBPs with respect to the operational PA*

Indicators	Group 1	Group 2	Group 3	Group 4	Group 5	Group 7	Group 8	Group 9	Group 10	Group 11	Group 12
PA downloaded		X	X	X							
PA uploaded/awaiting approval			X		X	X	X	X	X	X	X
PA rejected				X							
PA approved					X	X	X	X	X	X	X
Legitimacy Check in process and modifications needed						X					
Legitimacy Check in process and no modifications needed							X				
Legitimacy Check passed								X	X		X
Payment received										X	X
Countersigned PA uploaded									X		X
Technical On-boarding										X	X
Expected portal behaviour	Operational PA template is available for download in step 2.3 => please see example 1	Operational PA template is available for download in step 2.3 => please see example 1	Operational PA template is available for download in step 2.3 Old uploaded PA is "deprecated" => Please see example 2	Operational PA template is available for download in step 2.3 Old uploaded PA is still "rejector" => Please see example 2	Operational PA template is available for download in step 2.3 Old uploaded PA is "deprecated" => Please see example 2	The release of the operational PA will have no effect on the OBP dashboard, as long as the OBP is in process of the Legitimacy Check As soon as the Legitimacy Check is completed by EMVO and in case modifications of the information of the OBP are necessary, the OBP will be transferred back to step 2, for the ability to incorporate the requested changes of the information. As soon this happens the Operational PA template is available for download in step 2.3 and the old uploaded PA is "deprecated". => Please see example 2	The release of the operational PA will have no effect on the OBP dashboard, as long as the OBP is in process of the Legitimacy Check As soon as the Legitimacy Check is completed by EMVO, and modifications of the information of the OBP are not necessary step 3.1 will be marked as completed. To be able to access step 4 and step 5, EMVO has to confirm the successful reception of the on-boarding fee in step 3.1. As soon this happens step 4 and step 5 are available, hence the Operational PA template is available for download in step 5.5.1 and the Old uploaded PA is "deprecated". => Please see example 3	As soon as the Legitimacy Check is completed by EMVO, and modifications of the information of the OBP are not necessary step 3.1 will be marked as completed. To be able to access step 4 and step 5, EMVO has to confirm the successful reception of the on-boarding fee in step 3.1. As soon this happens step 4 and step 5 are available, hence the Operational PA template is available for download in step 5.5.1 and the Old uploaded PA is "deprecated". => Please see example 3	As soon as the Legitimacy Check is completed by EMVO, and modifications of the information of the OBP are not necessary step 3.1 will be marked as completed. To be able to access step 4 and step 5, EMVO has to confirm the successful reception of the on-boarding fee in step 3.1. => Please see example 3	As soon as the OBP is able to access step 4 and step 5, the Release of the Operational PA template will be available for download in step 5.5.1, however the old uploaded PA will be set to "deprecated". => Please see example 3	As soon as the OBP is able to access step 4 and step 5, the Release of the Operational PA template will be available for download in step 5.5.1, however the old uploaded PA will be set to "deprecated". Furthermore the countersigned PA field will switch the status from "next back on" to "awaiting hardcopies", as EMVO will need to upload a copy of the countersigned PA into the OBP Portal => Please see example 3
Conclusion/necessary steps	OBP can download the new operational PA in step 2.3 and upload a copy of the signed PA in step 2.4 for the first time	OBP has to download the operational PA in step 2.3 and upload a copy of the signed new operational PA in step 2.4	OBP has to download the operational PA in step 2.3 and upload a copy of the signed new operational PA in step 2.4	OBP has to download the operational PA in step 2.3 and upload a copy of the signed new operational PA in step 2.4	OBP has to download the operational PA in step 2.3 and upload a copy of the signed new operational PA in step 2.4	OBP has to download the operational PA in step 2.3 and upload a copy of the signed new operational PA in step 2.4	OBP has to complete step 3.1 and 3.3 to access step 4 and step 5 The OBP has to download the operational PA in step 5.5.1 and upload a copy of the signed new operational PA in step 5.5.2 Shipping of two signed hardcopies not needed EMVO will upload a copy of the double signed hardcopy on the OBP Portal	OBP has to complete step 3.3 to access step 4 and step 5 The OBP has to download the operational PA in step 5.5.1 and upload a copy of the signed new operational PA in step 5.5.2 Shipping of two signed hardcopies not needed EMVO will upload a copy of the double signed hardcopy on the OBP Portal	OBP has to complete step 3.3 to access step 4 and step 5 The OBP has to download the operational PA in step 5.5.1 and upload a copy of the signed new operational PA in step 5.5.2 Shipping of two signed hardcopies not needed EMVO will upload a copy of the double signed hardcopy on the OBP Portal	The OBP has to download the operational PA in step 5.5.1 and upload a copy of the signed new operational PA in step 5.5.2 Shipping of two signed hardcopies not needed EMVO will upload a copy of the double signed hardcopy on the OBP Portal	The OBP has to download the operational PA in step 5.5.1 and upload a copy of the signed new operational PA in step 5.5.2 Shipping of two signed hardcopies not needed EMVO will upload a copy of the double signed hardcopy on the OBP Portal

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Background:

As the new operational Participation Agreement will be made available for download, its release on the OBP Portal might have an effect on the certain status of the On-boarding process of an On-boarding Partner in the On-boarding Partner Portal. These effects depend on the statuses of the on-boarding steps of an OBP in the OBP Portal. The differences apply to certain steps of the on-boarding processes which can be found in column 1 of the sheet "Groups_identification". Depending on the certain statuses or characteristics (x = characteristic applies; (blank) = characteristic does not apply) 12 different groups can be identified, for which the effects of the Release of the operational PA on the OBP Portal are slightly different, however the conclusion/necessary steps might be the same.

Purpose:

The purpose of this sheet is to give the OBP the possibility to identify itself as a part of the characterised group, according to his on-boarding process of the OBP Portal, recognise the expected effects of the release of the operational PA on the OBP Portal and anticipate/apply the necessary steps to proceed with the on-boarding.

Example 1

Step 2: Detailed information and participation agreement			
		Time to complete	Status
2.1	General info pack ⓘ	Open	Available
2.2	Single Point of Contact and Assistant information ⓘ	Modify	5-7 min Completed
2.3	Participation Agreement ⓘ	View Download	1 min Available
2.4	Upload Signed Participation Agreement ⓘ	Upload PDF	1 min Not Started
2.5	Invoicing Information Form ⓘ	View Download	5 min Available
2.6	Upload Invoicing Information Form ⓘ	Upload PDF	1 min Not Started
2.7	MAH and product information ⓘ	Add	60 min Not Started
2.8	Confirm all inputted information ⓘ	Confirm	

Example 2

Step 1: Provide initial information Complete			
Step 2: Detailed information and participation agreement			
		Time to complete	Status
2.1	General info pack ⓘ	Open	Available
2.2	Single Point of Contact and Assistant information ⓘ	Modify	5-7 min Completed
2.3	Participation Agreement ⓘ	View Download	1 min Available
2.4	Upload Signed Participation Agreement ⓘ	Upload PDF	1 min Deprecated
2.5	Invoicing Information Form ⓘ	View Download	5 min Available
2.6	Upload Invoicing Information Form ⓘ	Upload PDF	1 min Not Started
2.7	MAH and product information ⓘ	Add	60 min Not Started
2.8	Confirm all inputted information ⓘ	Confirm	
Step 3: Approvals			
Step 4: Technical onboarding			

Example 3

Step 5: Maintenance			
5.1	MAH Information ⓘ	Modify	Completed
5.2	Company information ⓘ	Modify	5-7 min Completed
5.3	Single Point of Contact and Assistant Information ⓘ	Modify	Completed
5.4	Authorised representative information ⓘ	Modify	5-7 min Completed
5.5	Participation Agreement ⓘ ^		
5.5.1	Participation Agreement ⓘ	View Download	1 min Available
5.5.2	Upload Signed Participation Agreement ⓘ	Upload PDF	1 min Deprecated
5.5.3	Countersigned Participation Agreement send back to OBP ⓘ		21 days Awaiting hardcopy
5.6	Invoice Management ⓘ v		