

WITHIN THE REGION

➤ Valuation Process

Process where Senior, SDS II and Director will evaluate the submitted application.

❖ Senior Cooperative Development Specialist

1. Assign Validator > Click on “Assign Validator” button
2. Select Name of Cooperative Development Specialist from dropdown.
3. Click on “**Assign**” button.
4. In case Senior mistakenly assigned the Application or Validator is not available to evaluate the application, Senior can reassign the application to other Validator.

❖ Cooperative Development Specialist II

1. You will receive an email, informing that Senior assigned you a Branch Application for you to evaluate/evaluate.
2. Login to your Account
3. Click “**Branches and Satellites**”
4. Click on “View Document”
5. To review the details, user must click on “View” button on each menu (*By Laws, Articles of Cooperation, Treasurer’s Affidavit, etc*)
6. Once reviewed, user must click on “Tool” button
7. Answer the items provided on Tools (Answer by Yes/No using the radio button and enter Remarks on the field provided)
8. Input details on “Other Findings” and “Recommendations” *if there’s any*
9. Click on “Submit” button
10. After Submission > Click “Submit” button on Step 3
11. Pop-up message will appear to confirm decision > Enter Additional comment whether you have findings or none > Click on “Submit” button
12. Application will now go to Senior

❖ Senior Cooperative Development Specialist

1. Login to your Account
2. Click on “View Document” button > Additional Comment from CDS II are shown above of the page
3. Review Documents of Branch (Uploaded and Generated Documents)
4. Once done > Click on “Tool” button > Review the items answered by CDS II
5. Click on “Back” button and click on “Submit” button
6. Pop-up message will appear to confirm decision > Enter Additional Comment for Findings (*if there’s any*)
7. Application will now go to Director

❖ Director

1. Login to your account
2. Go to Branches and Satellite > Click on “View Documents”
3. Director will be able to view Comments from CDS II and Senior
4. Review Tools and Documents uploaded
5. Select Decision whether Approve, Deny or Defer
6. If Denied, enter reason why the application is being Denied
7. If Deferred, enter reason why the application is being Deferred
8. Once Approved, application will now go to Senior, and Client will receive Email that includes list of Documents that need to be submitted in CDA Office

➤ Payment to Print Process

Process where Senior will confirm that cooperative is okay to proceed for payment by comparing the physical submitted documents and documents on the system.

❖ Senior Cooperative Development Specialist

1. Login
2. Click on “Ok for Payment” button
3. *Wait for client to submit OR*
4. Click on “**Save O.R. No.**” > Input OR No. and Date of OR on the field provided
5. Click on “**Save**” button
6. Click on “**Print Registration**” button to make Branch officially registered > Print Certificate

OUTSIDE THE REGION

➤ Registration of Branch/Satellite

Process where user will Register Branch

- **Step 1** – Branch Registration and Basic Information
 1. Login to your account > Click Branches and Satellites
 2. Click on “New Branch/Satellite Registration”
 3. Accept Term and Conditions – Scroll down until you reach bottom and click on “Agree” if you agree and “Disagree” if you don’t want to proceed.
 4. Input “Registration No of the Cooperative” > Field will be automatically auto populated based on Cooperative Information
 5. User to select “Branch”
 6. Select Area of Operation (National)
 7. Enter House/Lot & Blk No. and Street Name (*Optional*)
 8. Select different Region, select Branch, Province, City/Municipality and Barangay where your Branch will operate
 9. Tick check box for “I have read and agreed to out Terms and Conditions.”
 10. Click on “Submit” button.
- **Step 2** – View Article of Cooperation, Treasurer Affidavit, Audited Financial Statement and Other uploaded documents.
 1. Click on “View” button
 2. On Step 2 click on “View” button
 3. User needs to upload “Business Plan, G.A Resolution and Certification”
Click on Upload button > Choose File > Click on “Submit” (*note: system only accept .pdf format*)
- **Step 3** – Submit Branch Application
Process where the user will review all the information provided.
After reviewing, user may now submit application. To proceed on application validation, click on “**Submit**” button on Step 3 > Confirm Submission (*Validation of your Branch Application will start*)

➤ Validation Process

Process where Senior and Director will validate the Branch Application

❖ Senior Cooperative Development Specialist

1. Login to your account
2. Go to Branches and Satellite
3. Click on “View” button
4. Review Generated and Uploaded Documents
5. Click on Submit button > Enter Additional Comment if there are any finding or good to go > then click on Submit
6. Application will now go to Director

❖ Director

1. Login to your account
2. Go to Branches and Satellite
3. Click on “View” button > Review Generated and Uploaded Documents
4. Click on Approve button
5. Application will now go to Senior of where the Branch will operate.

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10. After Submission > Click “Submit” button on Step 3
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12. Application will now go to Senior

❖ Senior Cooperative Development Specialist

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