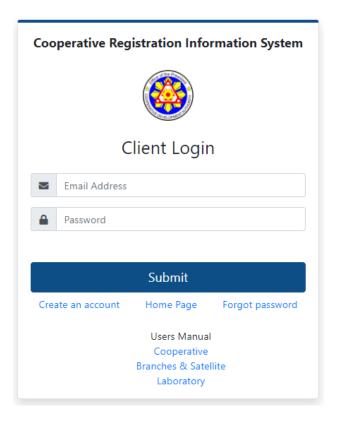
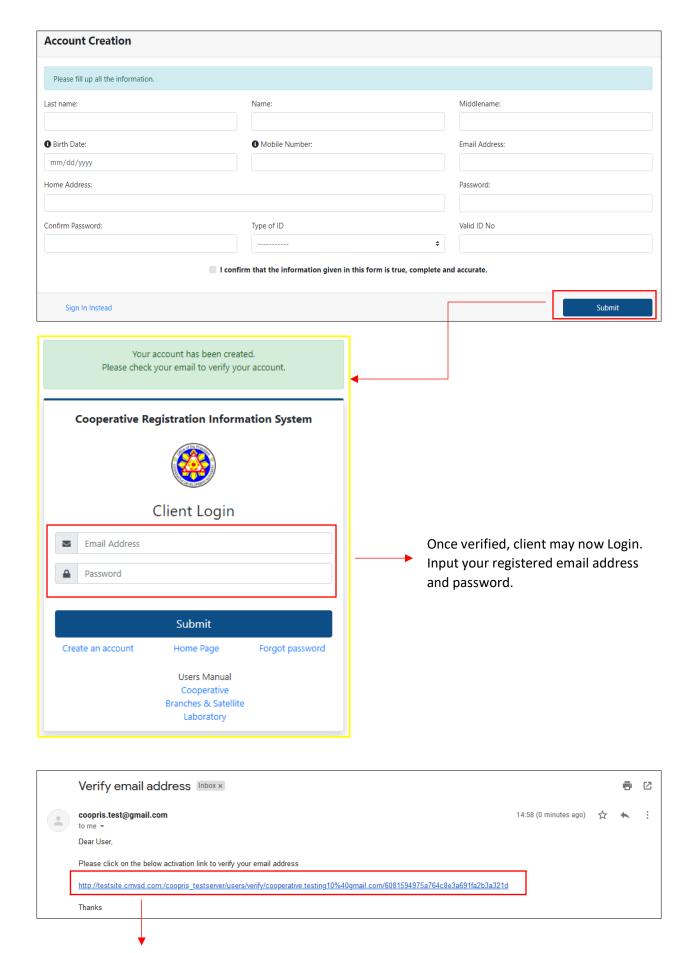
Account Creation

Before anything client must create Account Go to CDA https://www.cda.gov.ph

- 1. Click on "Cooperative Registration" and you will be redirected to login page
- 2. From login page click on "Create an Account" and enter the information required:
- 3. Basic Information (Name, Birth Date, Mobile Number)
- 4. E-mail Address (*Provided valid e-mail address will be used to login to your account, and to which all communications in relation to registration will be sent*)
- 5. Once E-mail Address already used, system will prompt * *This email is already taken*. Try to use other email address until system display * This email is available
- 6. Input Home Address
- 7. Input Password
- 8. Select Type of ID (*Please input the correct format of ID Number*)
- 9. Tick the check box before you click on "Submit" button
- 10. Check your email to verify your account





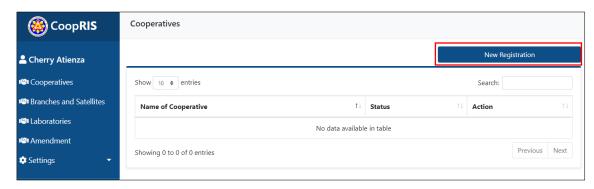


Click on the link to verify email address

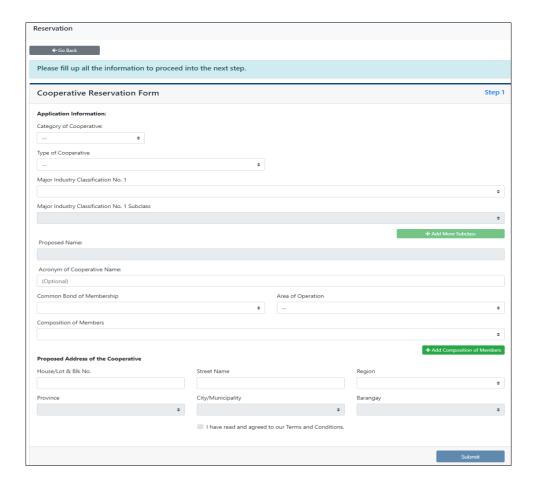
Reserve Cooperative

Please note that only 1 Cooperative can be registered in 1 Account. And only 1 reservation name can be done in one account, user is given 4 days before the expiration of Name Reservation (Step 1). However, if Name Reservation expires user are allowed to reserve again Cooperative Name.

- **Step 1** Once the client successfully logged in to the verified account, client may now apply/register Cooperative. To register:
 - 1. Click on "New Registration" button
 - 2. Agree to Terms and Conditions (scroll down until you reach the bottom and click on "Agree")

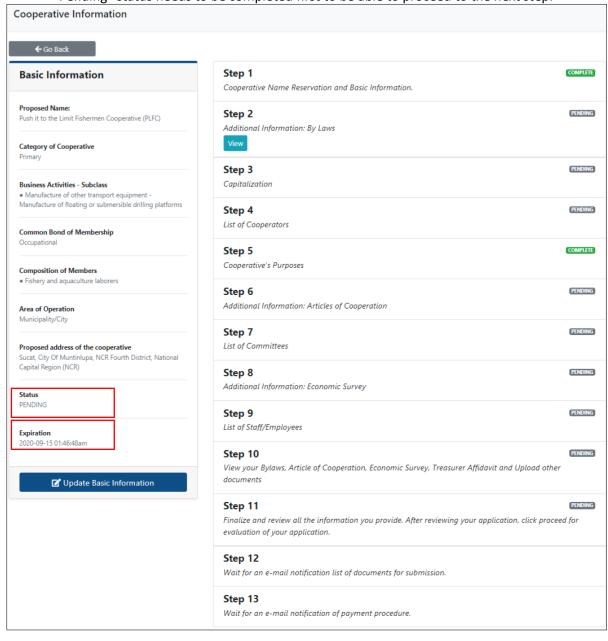


- 3. Client must select the following required information:
 - a. Category of Cooperative
 - **b.** Type of Cooperative
 - c. Major Industry Classification No. 1
 - d. Major Industry Classification No. 1 Subclass
 - e. Click on "+ Add More Subclass" if needed
- 4. Input "Proposed Name" (if proposed name has the same name on the selected Type of Cooperative, system will prompt user * This cooperative name is not available)
- 5. DO NOT INCLUDE word "Cooperative"; "Federation"; "Union" and even the Type of Cooperative. As the system will automatically display the Type of your cooperative and the word "Cooperative" after submission of form. (e.g. Agriculture Cooperative; Labor Services Cooperative; Credit Cooperative).
- 6. It is advisable not to input tagalog version of "Cooperative Type" and "Cooperative" (e.g. Samahan ng mga Magngingisda as it will looks like this "Samahan ng mga Mangingisda Fisherman Cooperative)
- 7. Input Acronym of Cooperative Name (this field is optional only) DO NOT INCLUDE "()" when you enter acronym as system will automatically provide ().
- 8. Select "Area of Operation"
- 9. Select "Common Bond of Membership" between Associational, Institutional, Occupational and Residential
 - a. If Associational > Input Field of Membership and Name of Association > Click on "+ Add Additional Name of Association" button if needed
 - **b.** If Institutional > Input Field of Membership and Name of Institution > Click on "+ Add Additional Name of Institution" button if needed
 - **c.** If Occupational > Input Composition of Members > Click on "+ Add Composition of Members" button if needed
- 10. "Proposed Address of the Cooperative"
 - a. Input House/Lot & Blk No. (not required)
 - **b.** Street Name (not required)
 - **c.** Select Region > Province > City/Municipality > Barangay
- 11. Tick check box "I have read and agreed to our Terms and Conditions"
- 12. Click on "Submit"



Complete Reservation Process

Cooperative Information Overview of all the steps that needs to be completed. Steps with "Pending" status needs to be completed first to be able to proceed to the next step.



Step 2 - Additional Information: By Laws

Note: Whatever information you enter will appear in the By Laws document

- 1. Click on "View" button on Step 2
- 2. To Edit > click on "Edit" button
- 3. Enter details on the following required fields:
 - a. Article II. Membership
 - i. **Section 1:** Select Kind of Membership (*Regular Member Only or Regular And Associate Membership*)
 - ii. **Section 2:** Input Qualifications of Membership (*if there are 2 or more qualification just click on "+ Add More Qualifications for Regular Member or Associate Member" and another field for Qualification Optional*)

 - iv. Section 4:
 - 1. Application for Membership: Input days from the filling.
 - 2. How much is the membership fee: Input membership fee
 - v. **Section 9:** Members Entitled to Vote (general conditions for members to vote already provided, if there are any additional conditions for members to be able to vote, just click on "+ Add More Members Entitled to Vote" and enter qualification) To delete more requirements for membership, click cicon. (not required)

b. Article III. Administration

- i. Section 4: Input Regular General Assemble Meeting. Validation: Shall not be beyond ninety (90) days after the close of the calendar year. (format must be "Second/2nd Saturday of January")
- ii. **Section 8:** Select Quorum for General Assembly Meeting (selection already displayed in dropdown)
- c. Article IV. Board of Directors
 - i. Section 4: Enter Disqualification
 - ii. Section 6: Enter Election of Directors
- d. Article VII. Capital Structure
 - i. **Section 2:** Enter Continuous Capital Build-Up (Note: At least one of the three fields is required)
- e. Article VIII. Allocation and Distribution of Net Surplus
 - i. **Section 1:** Enter Allocation (*Note: Community Development Plan and Optional Fund should be total of 10%*)
 - ii. **Section 2:** Enter Interest on Share Capital and Patronage Refund *(Max value is 5)*

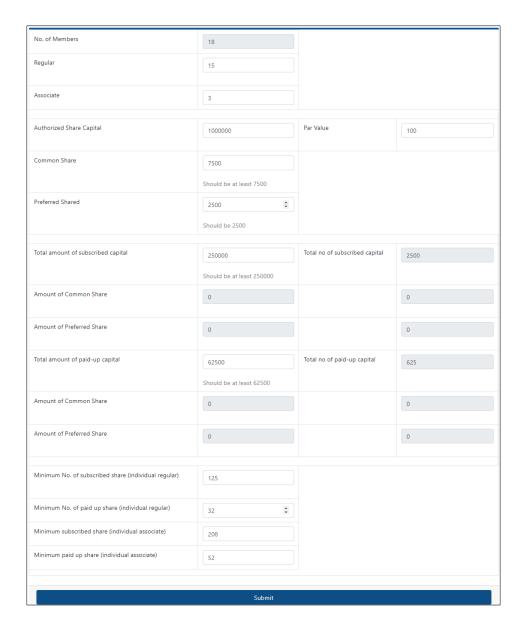
f. Article XI. Amendments

- i. Section 1: Amendment of Articles of Cooperation and Bylaws (Voting Rights)
- 4. Click on Submit button (submission will not proceed if there are fields that failed to comply on the requirements. System will show which field(s) should be amended, changed or requiring information)
- 5. Step 3 will be open for Capitalization

• Step 3 – Capitalization

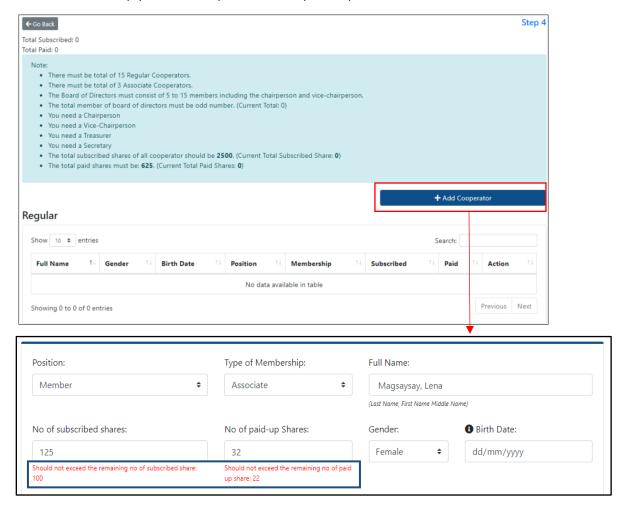
To complete the Capitalization process, user needs to:

- 1. Indicate the total no. of Cooperatives' members. (please note that the required no. of Regular Member is minimum of 15)
- 2. Indicate the Authorized Share Capital and Par Value
- 3. Once user entered Authorized and Par Value, the system will show the <u>minimum no.</u> to each field (minimum only meaning, data can be higher than the minimum requirement)
- 4. User are allowed to edit Common and Preferred Share, Total amount of Subscribe and Paid-up Capital.
- 5. Field for "Amount of Common Share and Amount of Preferred Share" will be updated once user Add Cooperators.
- 6. Enter "Minimum No. of subscribe share" and "Minimum No. of paid up share" (for both Regular and Associate" if there's associate member)
- 7. Click on Submit once done



• Step 4 – List of Cooperators

Required Position within the Cooperative are noted, to guide the User on adding Cooperators. User must comply with the requirement to open Step 5.



To Add Cooperator:

- 1. Click on "View" button on Step 4
- 2. Click on "+ Add Cooperator" button
- 3. Please be mindful of the Reminder (the requirement noted came on your By-Laws Capitalization)

Reminder: (The information below is in your bylaws (capitalization))

- Regular Member must subscribed at least 100 shares and pay at least 25 shares.
- Associate Member must subscribed at least 125 shares and pay at least 32 shares.
- 4. Select Position
- 5. Select Type of Membership
- 6. Enter Full Name of Cooperator (Format: Last Name, First Name Middle Name)
- 7. Input "No. of Subscribed Shares:" and "No. of paid-up Shares" for Regular and Associate (if there's associate) (Must not be greater than 10% if your Total No. of Subscribed Capital) shares can be change but should not be lower than minimum Subscribe/Paid Up declared in Capitalization
- 8. Select Gender
- 9. Enter Birth Date
- 10. Enter House/Lot & Blk No. and Street Name (optional)
- 11. Select Type of ID and enter ID No.
- 12. Enter Date of Issued and Place of Issuance
- 13. Click on Submit
- 14. Repeat steps 2-13 until you comply on the requirements
- 15. If ever user encounter message under No. of Subscribe and Paid-up Shares (ex: "Should not exceed the remaining no of subscribed share: 100" and "Should not exceed the remaining no. of paid up share: 22") user must update the no. of Subscribe and Paid up capital in Capitalization module.
- 16. Note: If you want to add more members and/or increase subscribed and paid share of member(s), you need to update your capitalization.
- Step 5 Ex: Cooperative's Purposes for Dairy Cooperative

 There's coop where system requires to remove the blank and replace it with appropriate information before you can proceed to the next step. (e.g. Agriculture Cooperative)

That the purposes for which this Cooperative is organized are to engage in:

1. Production of fresh milk, for business and human consumption
2. Processing of milk to dairy products including, milk variants and cheese for business and human consumption
3. Assisting its members a guaranteed market outlet, to bargain for the best price terms possible in the market place, including over-order premiums in milk marketing orders, and to market the milk efficiently, i.e. balancing plant needs, diverting milk surpluses and assembling producer milk and to have the highest quality producer milk possible in the market
4. Providing services for the research and development for the production and processing of dairy products including fresh milk, milk variants and cheese
5. Promoting and advancing the economic and social status of the members
6. Coordinating and facilitating the activities of cooperatives
7. Advocating for the cause of the cooperative movements
8. Ensuring the viability of cooperatives through the utilization of new technologies
9. Encouraging and promoting self-help or self-employment as an engine for economic growth and poverty alleviation.

Purposes of Cooperative are already given; however, user may still change or add Coop's Purposes by:

- 1. Click on "View" button on Step 5
- 2. Clicking on "Edit Purposes"
- 3. Make some changes on the existing fields if needed.



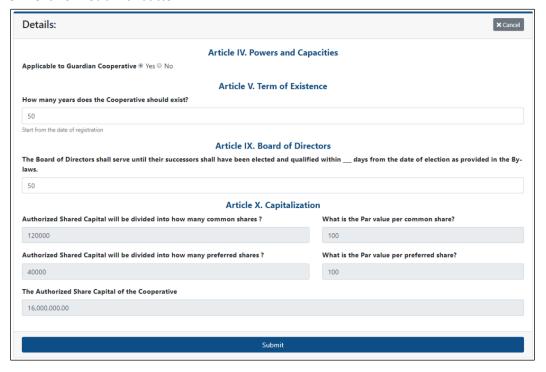
• Step 6 – Additional Information: Articles of Cooperation

Reminders are noted below:



To Edit Articles of Cooperation:

- 1. Click on "View" button on Step 6
- 2. Click on "Edit" button
- 3. Answer between "Yes" or "No" if Applicable to Guardian Cooperative (if answered as YES, Coop are allowed to create Laboratory)
- 4. Enter details on the following required fields:
 - a. Article V. Term of Existence
 - b. Article IX. Board of Directors
- 5. Click on "Submit" button

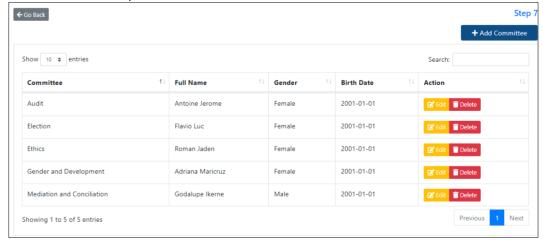


(See next page for next step)

• Step 7 – List of Committees

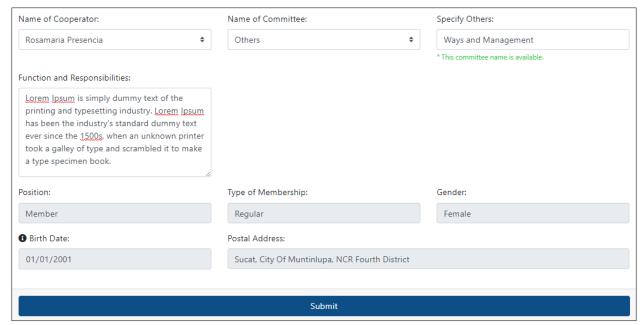
To add Committee:

- 1. Click on "View" button on Step 7
- 2. Click on "+ Add Committee" button
- 3. Select Name of Cooperator from dropdown and select Name of Committee
- 4. User may also add "Other Committee" by selecting "Others" on Name of Committee dropdown and enter Committee name on the open field provided.
- 5. Maximum of 3 members per committee
- 6. Note: There must be at least 1 Gender and Development Committee, Election, Mediation and Conciliation, Audit and Ethics.



To add other Committees, all you have to do is:

- 1. Click on "+ Add Committee"
- 2. Select Name of Cooperator from dropdown and select "Others"
- 3. Specify the Name of other Committee
- 4. Input Functions and Responsibilities
- 5. Click on "Submit" button
 - ** Please note if we use the **edit form** for the Committee with "Other Committee" position, we can re-assign them but to "Other Committee" position only and not on the default Committee Position(e.g Audit, Election, Education and Training, Mediation and Conciliation, Ethics and Gender and Development)**



• Step 8 – Additional Information: Economic Survey

Note: Whatever information you enter will appear in the Economic Survey document.

- 1. Click on "View" button on Step 8
- 2. Click on "Edit" button
- 3. Enter details on the following required fields:
 - a. Background and Rationale
 - b. General Information
 - c. Strategic Operational Studies

- i. Economic Aspect
- ii. Financial Aspect
- iii. Technical Aspect
- iv. Organizational Structure
- 4. Click on "Submit" button

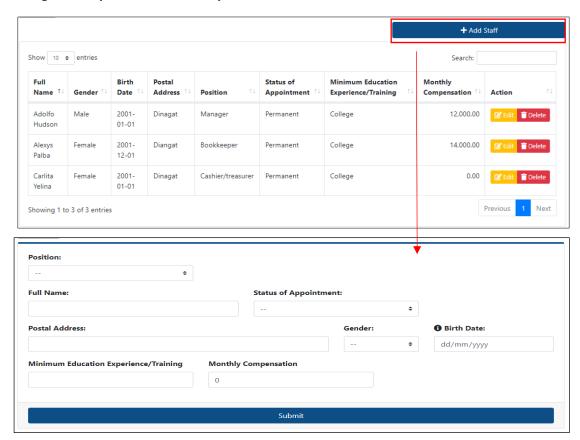
If you clicked on "Submit" button but failed to proceed, try to review all the page as you might missed to answer a required field. Don't worry system will provide message "This field is required" highlighted in RED font to be able to see easily.

• **Step 9 –** *List of Staff/Employees*

Required Staffs within the Cooperative are noted to guide the User for adding.

User must comply with the requirement to open the next step. (*There must be "Manager, Bookkeeper and Cashier/Treasurer"*)

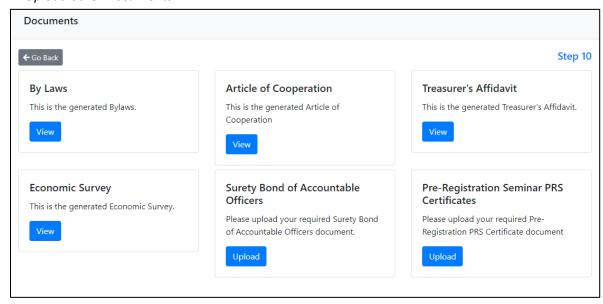
NOTE: "No BOD members shall hold any position directly involved in day-to-day operation and management operation of the Cooperative"



To Add Staff:

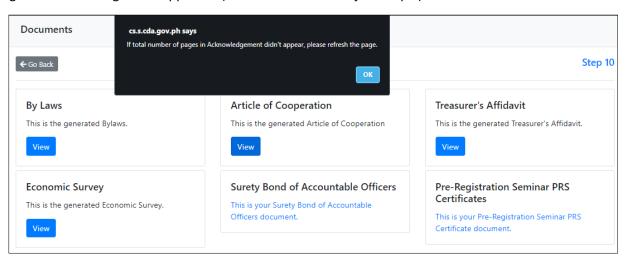
- 1. Click on "View" button Step 9
- 2. Click on "+ Add Staff" button
- 3. Select "Position" from dropdown (only one staff are allowed to be added per Position)
- 4. Enter Full Name of Staff
- 5. Select "Status of Appointment" from dropdown
- 6. Enter Postal Address and Select Gender
- 7. Enter Date of Birth
- 8. Input Minimum "Education Experience/Training" and "Monthly Compensation"
- 9. Click on Submit
- 10. If ever the Position is not available on the choices, user is allowed to add other Position. To add Position, select "Others" from the dropdown > New field will appear > This will allow you to add New Position Name > Enter Position > Enter other required fields and click Submit
- 11. Repeat steps 3-9 until you comply on the requirements

• Step 10 – View you By-Laws, Article of Cooperation, Economic Survey, Treasurer Affidavit and Upload other Documents



In viewing the **Article of Cooperation**, user will encounter message "If total number of pages in Acknowledgment didn't appear, please refresh the page".

Note: Before you download and print the Articles of Cooperation please make sure that Total No. of Pages in Acknowledgement appeared (see screenshot below for sample).

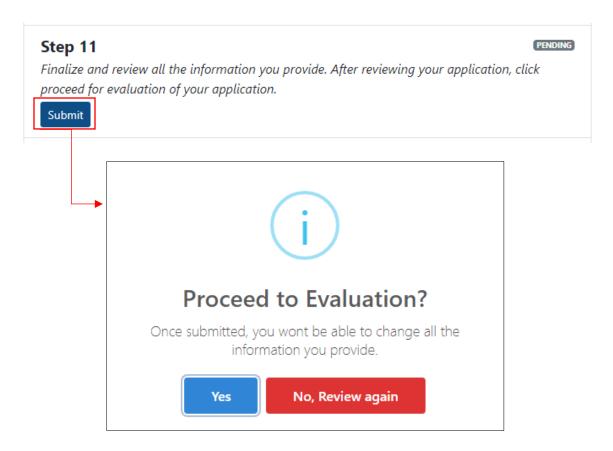


This instrument known as Article of Cooperation of San Carlos City Teachers Savings Producers Cooperative, consists of 14 pages including this page where the acknowledgment is written signed by parties and their instrumental witnesses on each and every page thereof.

User must upload required document for Bond of Accountable Officers and Pre- Registration PRS Certificate and other required document according to Type of Cooperative. To upload

- 1. Click on "View" button on Step 10
- 2. On Surety Bond of Accountable Officers > Click on "**Upload**" button
- 3. Click on "Choose File" and select file to be uploaded
- 4. Click on "Submit" button
- 5. Repeat step to upload another file.
- 6. Same step to upload PRS and other required documents
- 7. Click on "View" button if you wish to see document (By Laws, Article of Cooperation, Treasurer's Affidavit and Economic Survey)
- 8. Click hyperlink to view uploaded Surety Bond and PRS.

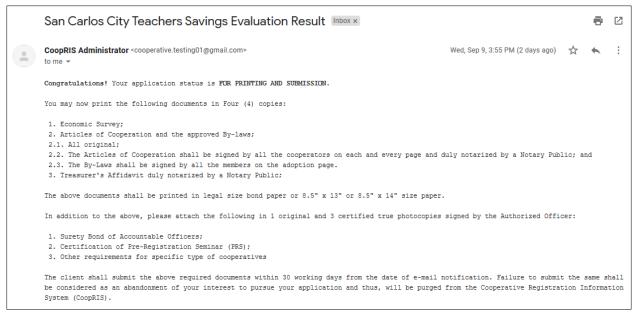
Step 11 – Submit Cooperation application
Finalize and review all the information you provide. After reviewing, you may now submit your application. To proceed on application evaluation, click on "Submit" button on Step 11 > Confirm Submission (evaluation of your cooperative application will start)



After confirmation, this message will appear:

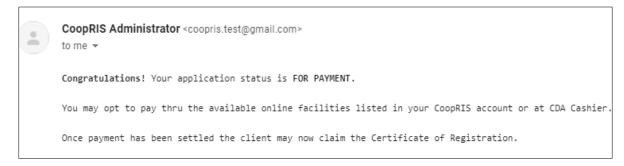
Successfully submitted your application. Please wait for an e-mail of either the payment procedure or the list of documents for compliance

Step 12 – Wait for an e-mail notification list of documents for submission
 Once the evaluation of your application is done and been reviewed, you will receive an email stating "Your application status is FOR PRINTING AND SUBMISSION" and also email includes instruction. Please see sample email below.

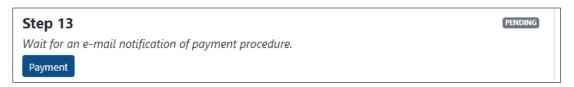


Submit in CDA all required documents listed on the email.

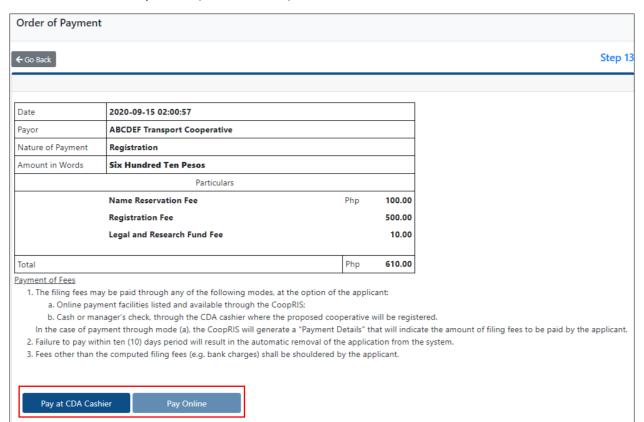
• Step 13 – Wait for an e-mail notification of payment procedure



- 1. Client (Cooperative) will receive email confirmation (sample email is shown above)
- 2. Client will login to their account and click "Payment" button on Step 13



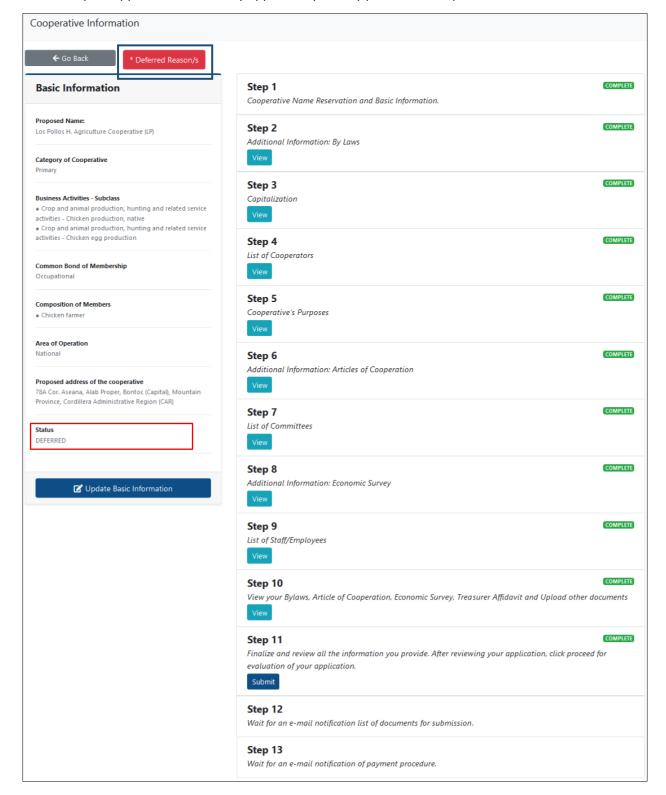
- 3. System will display Order of Payment. Choose between:
 - a. Pay at CDA Treasure
 - b. Pay Online (thru Landbank)



- 4. Click on the button of your choice
- 5. If you choose on "Pay at CDA Cashier", print out the Order of Payment and pay at the Cashier of CDA to get your Official Receipt and Certificate

Deferred Application

- If your application was deferred you will receive email advising the reason why your application is being deferred. (see sample screenshot below)
- Those reasons and comment will also appear on your account. (see sample screenshot below)
- You will need to comply with the said findings before you submit again the application for reevaluation. Once complied, you may click on "Submit" button in "Step 11"
- If your application was finally approved, you may proceed to step 12.



Email from: CoopRIS Administrator

