

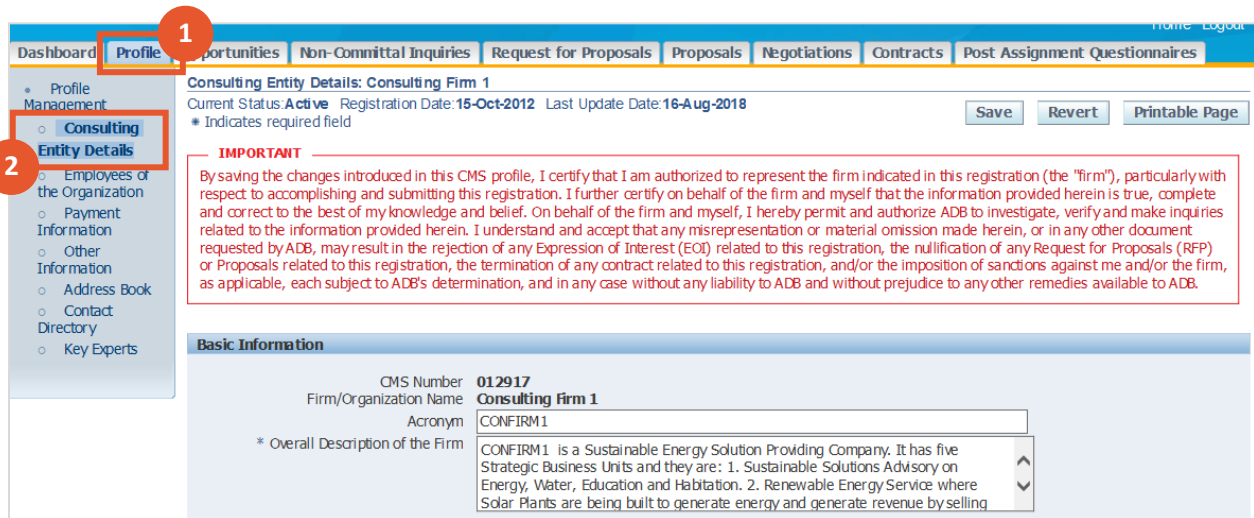
Consulting Firm Initiated Affiliations

Note

- Signifying affiliation with a firm or key expert/individual consultant requires that both parties be registered in CMS.
- The affiliation process may still be initiated even if the other party has not yet registered in CMS – the system takes care of sending an automated email that prompts the unregistered party to create an account in CMS.

Firm to Firm Affiliation Requests

1. Log in to **CMS** (<https://cms.adb.org>) and proceed to the **Profile** tab.
2. Click on the **Consulting Entity Details** category on the left side.



3. Scroll down to the **Affiliate Organizations** section.
4. You can also optionally display only **Organizations** with a particular affiliation status by clicking on the **Show** dropdown box then click on **Go** button.
5. Click on the **Add Affiliate Organization(s)** button to affiliate other firm accounts.



- 6. The **Affiliate Organizations** screen opens.
- 7. If the **Firm** is registered in CMS, click **Yes** then indicate the Firm's **CMS Number**. Fill in the rest of the required fields.

Affiliate Organizations 6

* Indicates required field

OK Cancel

Signifying affiliation with a firm requires CMS registration for both parties. If the firm is not registered in CMS or you are unsure as to this fact, you may still proceed by choosing "No" to the question below, "Is the firm registered in CMS?".

Is the firm registered in CMS? Yes No

* CMS Number

* Firm/Organization Name

* Country of Incorporation

Click "OK" to send an affiliation request to the Firm. If the firm/organization name you entered above is different from the name appearing in the firm's CMS Registration Profile, the latter name will be used instead upon confirmation of the affiliation request.

- 8. If the Firm is not yet registered, then **CMS Number** is not needed, but the Firm's email address will have to be provided.
- 9. Click **OK**.

Affiliate Organizations 9

* Indicates required field

OK Cancel

Signifying affiliation with a firm requires CMS registration for both parties. If the firm is not registered in CMS or you are unsure as to this fact, you may still proceed by choosing "No" to the question below, "Is the firm registered in CMS?".

Is the firm registered in CMS? Yes No

* Firm/Organization Name

* Country of Incorporation

* Email Address

Click "OK" to send an email request to the Firm to do the following:
1) create an account in CMS, if currently unregistered
2) provide you their CMS number and country of incorporation
Return to this screen (Affiliate Organizations) when you receive the requested information and this time choose "Yes" to "Is the firm registered in CMS?". Fill in the details and click OK.

10. Verify that the request is sent under **Profile > Consulting Entity Details > Affiliate Organizations** section. A new line with the **Request sent** status will be displayed for both the requesting firm and the one being affiliated.

Affiliate Organizations					
Show	All	Go			
Add Affiliate Organization(s)					
CMS Number	Organization Name	Country of Incorporation	Affiliation Status	Details	Delete
012760	Consulting Firm 2	United States	Confirmed		
012944	Consulting Firm 3	Georgia	Request Sent		

11. At this point, the **Affiliation Request** has already been sent out to the other Firm.

Note

- If the **Firm is already registered**, the Firm’s Primary Contact will have to log into their CMS account and confirm the affiliation request.
- If the **Firm is not yet registered** in CMS, a notification will be sent out to the email address provided requesting the Firm to register in CMS.

Firms Responding to Affiliation Requests

Firm recipient of the affiliation request is registered in CMS

1. The responding firm receives a notification via CMS-generated email. The recipient will need to log in to their CMS account. In the CMS **Dashboard**, click either the **Project Link** or the **Go to Task** icon of the action item with status **Affiliate Organization**.


ADB Consultant Management System Logged In As Consulting Firm 3 (CONFIRM3@EMAIL.COM)

Home Logout

Dashboard Profile Opportunities Non-Committal Inquiries Request for Proposals Proposals Negotiations Contracts Post Assignment Questionnaire

TIP The Dashboard serves as a convenient starting point to directly access pending CMS tasks and online help and references. Please remember to **save your data every 15 minutes to avoid losing changes** due to system timeout. For inquiries, contact cmshelp@adb.org.

ATTENTION: Please limit your choice of currency with regard to Non-Committal Inquiry or Proposals to the following: "AUD", "CAD", "EUR", "GBP", "JPY", "NZD", "PHP" or "USD". This applies only for ADB-Administered Selections. For more information, click [here](#).

Date	Type	Project	Status	Go To Task
6-Aug-2018	Profile	CMS 012917 Consulting Firm 1	Affiliate Organization	

References
[Guidelines on the Use of Consultants](#)
[Project Administration Instructions](#)
[Consulting Services Operations Manual](#)

Quick Reference Guides
[Tips for Responding to Request for Proposals](#)
[CMS Basics](#)
[Managing Consulting Firm Profiles](#)
[Searching Opportunities and Submitting EOIs](#)
[Responding to Request for Proposals](#)

2. In the **Affiliate Organizations** screen, **Affiliation Status** dropdown list box, change the selection option from **For Confirmation** to the preferred response, whether **Confirmed** or **Declined**.
3. Click **OK**.

Affiliate Organizations

* Indicates required field

Is the firm registered in CMS? Yes No

CMS Number **012917**

Firm/Organization Name **Consulting Firm 1**

Country of Incorporation **India**

* Affiliation Status **For Confirmation** ▼

- For Confirmation
- Confirmed**
- Declined

OK **Cancel**

- 4. Verify the confirmation under the **Profile** tab, **Consulting Entity Details** category, **Affiliate Organizations** section. The **Confirmed** affiliation status will be displayed for both the requesting firm and the one being affiliated.

Affiliate Organizations					
Show All Go					
Add Affiliate Organization(s) Previous 1-10 of 24 Next 10					
CMS Number	Organization Name	Country of Incorporation	Affiliation Status	Details	Delete
020761	Aleph Limited	New Zealand	Confirmed		
012917	Consulting Firm 1	India	Confirmed		
012791	DOLSAR Engineering Limited	Turkey	Confirmed		

Firm recipient of the affiliation request is not yet registered in CMS

1. An email will be sent to the recipient prompting them to create an account in CMS to respond to the affiliation request.
2. After the responding Firm creates an account in CMS, they may email or otherwise communicate their newly acquired **CMS Number** along with their **Country of Incorporation** to the sender of the request.
3. Upon being provided such information, the sender of the affiliation request returns to the **Profile** tab then click on **Consulting Entity Details** category.
4. A line in the **Affiliate Organizations** section lists the name of the other Firm with the status **Request Sent**. There is no **CMS Number** yet associated with that Firm.
5. Click the **Details** icon.

CMS Number	Organization Name	Country of Incorporation	Affiliation Status	Details	Delete
012760	Consulting Firm 2	United States	Confirmed		
	Consulting Firm 3	Georgia	Request Sent	5	

6. The **Affiliate Organizations** screen appears. Change the current option for **Is the firm registered in CMS?** to **Yes**.
7. Fill in the **CMS Number** field, which should now be visible and change any other details as needed.
8. Click on **OK**.

Affiliate Organizations
* Indicates required field

Signifying affiliation with a firm requires CMS registration for both parties. If the firm is not registered in CMS or you are unsure as to this fact, you may still proceed by choosing "No" to the question below, "Is the firm registered in CMS?".

Is the firm registered in CMS? Yes No

* CMS Number

* Firm/Organization Name

* Country of Incorporation







Affiliation Status **Request Sent**

Your affiliation request has been sent to the Firm. If the firm/organization name you entered above is different from the name appearing in the firm's CMS Registration Profile, the latter name will be used instead upon confirmation of the affiliation request.

9. Once saved, the responding Firm should log into their CMS account and confirm the affiliation request by following [steps 1-4](#) where the recipient is registered in CMS.

Signifying the end of Affiliation with a Firm

1. Either firm may choose to signify the end of the affiliation.
2. From the **Profile** tab, **Consulting Entity Details** category, **Affiliate Organizations** section, click the **Details** icon.

Affiliate Organizations					
Show <input type="text" value="All"/> <input type="button" value="Go"/>					
<input type="button" value="Add Affiliate Organization(s)"/>					
Previous 1-10 of 24 Next 10					
CMS Number	Organization Name	Country of Incorporation	Affiliation Status	Details	Delete
020761	Aleph Limited	New Zealand	Confirmed		
012917	Consulting Firm 1	India	Confirmed		
012791	DOLSAR Engineering Limited	Turkey	Confirmed		

3. Change the Affiliation Status to **Affiliation Ended**.
4. Click **OK**.

Affiliate Organizations

* Indicates required field

Is the firm registered in CMS? Yes No

CMS Number

Firm/Organization Name

Country of Incorporation Japan

* Affiliation Status Confirmed
Affiliation Ended

Withdrawing the Affiliation Request for a Firm

1. The sender of the affiliation confirmation request can opt to withdraw the request. This is allowed so long as no response has been chosen online by the recipient of the request.
2. Click the **Profile** tab.
3. Click the **Consulting Entity Details** category.

Consulting Entity Details: Consulting Firm 1
 Current Status: **Active** Registration Date: **15-Oct-2012** Last Update Date: **16-Aug-2018**
 * Indicates required field

IMPORTANT
 By saving the changes introduced in this CMS profile, I certify that I am authorized to represent the firm indicated in this registration (the "firm"), particularly with respect to accomplishing and submitting this registration. I further certify on behalf of the firm and myself that the information provided herein is true, complete and correct to the best of my knowledge and belief. On behalf of the firm and myself, I hereby permit and authorize ADB to investigate, verify and make inquiries related to the information provided herein. I understand and accept that any misrepresentation or material omission made herein, or in any other document requested by ADB, may result in the rejection of any Expression of Interest (EOI) related to this registration, the nullification of any Request for Proposals (RFP) or Proposals related to this registration, the termination of any contract related to this registration, and/or the imposition of sanctions against me and/or the firm, as applicable, each subject to ADB's determination, and in any case without any liability to ADB and without prejudice to any other remedies available to ADB.

Basic Information

CMS Number	012917
Firm/Organization Name	Consulting Firm 1
Acronym	CONFIRM1
* Overall Description of the Firm	CONFIRM1 is a Sustainable Energy Solution Providing Company. It has five Strategic Business Units and they are: 1. Sustainable Solutions Advisory on Energy, Water, Education and Habitation. 2. Renewable Energy Service where Solar Plants are being built to generate energy and generate revenue by selling

4. Scroll down to the **Affiliate Organizations** section.
5. Click the **Delete** icon on the far right of the same line as the firm affiliation request.

Affiliate Organizations

Show: All Go

Add Affiliate Organization(s)

CMS Number	Organization Name	Country of Incorporation	Affiliation Status	Details	Delete
012760	Consulting Firm 2	United States	Confirmed		
012944	Consulting Firm 3	Georgia	Request Sent		

6. Click **Save**.

Consulting Entity Details: Consulting Firm 1
 Current Status: **Active** Registration Date: **15-Oct-2012** Last Update Date: **16-Aug-2018**
 * Indicates required field

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Basic Information

CMS Number	012917
Firm/Organization Name	Consulting Firm 1
Acronym	CONFIRM1
* Overall Description of the Firm	CONFIRM1 is a Sustainable Energy Solution Providing Company. It has five Strategic Business Units and they are: 1. Sustainable Solutions Advisory on Energy, Water, Education and Habitation. 2. Renewable Energy Service where Solar Plants are being built to generate energy and generate revenue by selling

Firm to Individual Affiliation Requests

1. Log in to **CMS** (<https://cms.adb.org>) and proceed to the **Profile** tab.
2. Click on the **Key Experts** category on the left side.
3. Click the **Add Key Expert(s)** button. You can also optionally display only **Key Experts** with a particular affiliation status by clicking on the **Show** dropdown box then click the **Go** button.

1 Profile

Key Experts: Consulting Firm 1
Current Status: Active Registration Date: 15-Oct-2012 Last Update Date: 16-Aug-2018

2 Key Experts

3 Add Key Expert(s)

CMS Number	Last Name	First Name	Country Of Birth	Full-Time Firm Expert	Affiliation Status	Details	View Profile	Delete
086556	Consultant 2	Individual	China	Yes	Confirmed			
140428	Consultant 3	Individual	India	Yes	Confirmed			

4. The **Key Experts** screen opens.
5. Indicate whether the **Key Expert** is registered in CMS. If unsure, choose **No**.
6. If the **Key Expert** is registered in CMS, then the Expert's **CMS Number** will have to be entered. Fill in the rest of the required fields.

4 Key Experts

* Indicates required field

Signifying affiliation with an expert requires CMS registration for both parties. If the expert is not registered in CMS or you are unsure as to this fact, you may still proceed by choosing "No" to the question below, "Is the expert registered in CMS?".

5 Is the Expert registered in CMS? Yes No

6

- * CMS Number
- * Last Name
- * First Name
- * Country of Birth

Full-Time Expert of the Firm? Yes No

Click "OK" to send an affiliation request to the expert. If the expert name you entered above is different from the name appearing in the expert's CMS Registration Profile, the latter name will be used instead upon confirmation of the affiliation request.

- If the Expert is not yet registered, then **CMS Number** is not needed, but the Expert's email address will have to be provided.
- Click **OK**.

Key Experts

* Indicates required field

Signifying affiliation with an expert requires CMS registration for both parties. If the expert is not registered in CMS or you are unsure as to this fact, you may still proceed by choosing "No" to the question below, "Is the expert registered in CMS?".

Is the Expert registered in CMS? Yes No

* Last Name

* First Name

* Email Address

Full-Time Expert of the Firm? Yes No

- To confirm that the Affiliation Request has been sent, the **Affiliation Status** of the corresponding request should be **Request Sent**.

Dashboard | Profile | Opportunities | Non-Committal Inquiries | Request for Proposals | Proposals | Negotiations | Contracts | Post Assignment Questionnaires

Profile Management

- Consulting Entity Details
- Employees of the Organization
- Payment Information
- Other Information
- Address Book
- Contact Directory
- Key Experts**

Confirmation
Your changes have been applied successfully.

Key Experts: Consulting Firm 1
Current Status: **Active** Registration Date: **15-Oct-2012** Last Update Date: **16-Aug-2018**

IMPORTANT

By saving the changes introduced in this CMS profile, I certify that I am authorized to represent the firm indicated in this registration (the "firm"), particularly with respect to accomplishing and submitting this registration. I further certify on behalf of the firm and myself that the information provided herein is true, complete and correct to the best of my knowledge and belief. On behalf of the firm and myself, I hereby permit and authorize ADB to investigate, verify and make inquiries related to the information provided herein. I understand and accept that any misrepresentation or material omission made herein, or in any other document requested by ADB, may result in the rejection of any Expression of Interest (EOI) related to this registration, the nullification of any Request for Proposals (RFP) or Proposals related to this registration, the termination of any contract related to this registration, and/or the imposition of sanctions against me and/or the firm, as applicable, each subject to ADB's determination, and in any case without any liability to ADB and without prejudice to any other remedies available to ADB.

Key Experts

Note: To know more about the qualifications of the Individual Consultants registered in the ADB's CMS, please click on this icon:

Show

CMS Number	Last Name	First Name	Country Of Birth	Full-Time Firm Expert	Affiliation Status	Details	View Profile	Delete
086556	Consultant 2	Individual	China	Yes	Confirmed			
140428	Consultant 3	Individual	India	Yes	Confirmed			
	Consultant 1	Individual		Yes	Request Sent			

10. At this point, the **Affiliation Request** has already been sent out to the **Key Expert**.

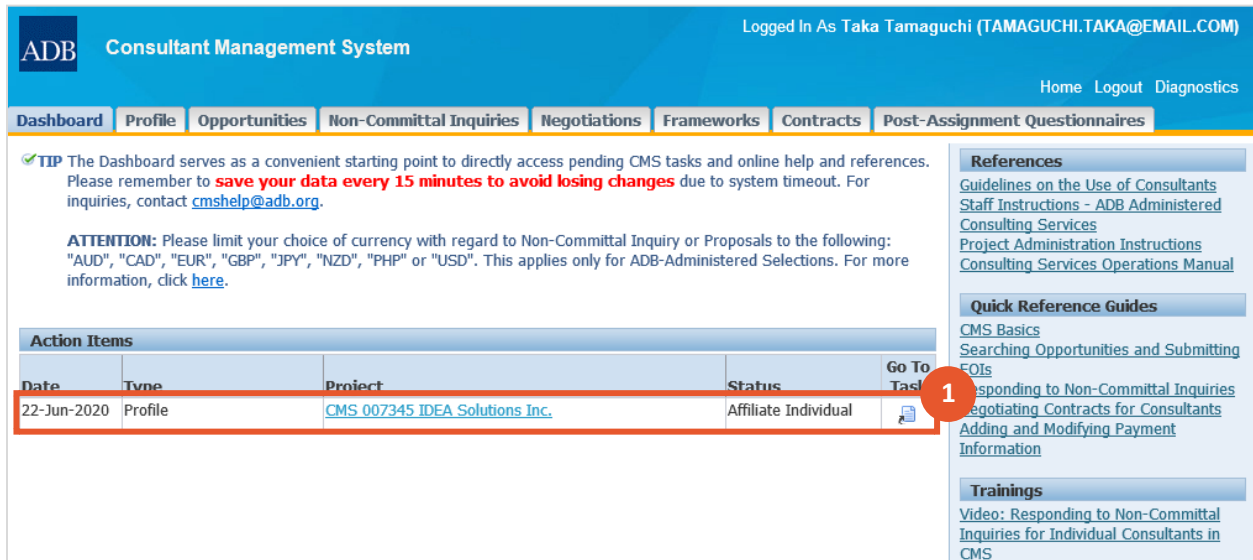
Note

- If the **Key Expert is already registered**, the Individual Consultant will have to log in to his CMS account and confirm the affiliation request.
- If the **Key Expert is not yet registered** in CMS, a notification will be sent out to the email address provided requesting to Key Expert register in CMS.

Individual Consultants Responding to Affiliation Requests

Recipient of the affiliation request is registered in CMS

1. The expert responding to the Affiliation request receives a notification via CMS-generated email. The recipient will need to log in to their CMS account. In the CMS **Dashboard**, click either the **Project Link** or the **Go to Task** icon of the action item with status **Affiliate Individual**.



2. Indicate whether the firm can view your profile.
3. In the **Affiliation Status** dropdown list box, change the selection option from **For Confirmation** to the preferred response, whether **Confirmed** or **Declined**.
4. Click **OK**.



Recipient of the affiliation request is not yet registered in CMS

1. CMS will generate an email that will be sent to the expert, prompting the creation of an account in CMS.
2. After the Key Expert creates an account in CMS, they may email or otherwise communicate their newly acquired **CMS Number** along with his/her **Country of Birth** to the sender of the request.
3. Upon being provided such information, the sender of the affiliation request returns to the **Profile** tab then click on **Key Experts** category.
4. A line in the **Key Experts** section lists the name of the other Firm with the status **Request Sent**. There is no CMS Number yet associated with that expert.
5. Click on **Details** icon.

Dashboard | Profile | Opportunities | Non-Committal Inquiries | Request for Proposals | Proposals | Negotiations | Frameworks | Contracts | Post-Assignment Questionnaires

Key Experts: IDEA Solutions Inc.
Current Status: Active Registration Date: 11-Nov-2009 Profile Last Update Date: 22-Jun-2020 [Save] [Revert]

IMPORTANT
By saving the changes introduced in this CMS profile, I certify that I am authorized to represent the firm indicated in this registration (the "firm"), particularly with respect to accomplishing and submitting this registration. I further certify on behalf of the firm and myself that the information provided herein is true, complete and correct to the best of my knowledge and belief. On behalf of the firm and myself, I hereby permit and authorize ADB to investigate, verify and make inquiries related to the information provided herein. I understand and accept that any misrepresentation or material omission made herein, or in any other document requested by ADB, may result in the rejection of any Expression of Interest (EOI) related to this registration, the nullification of any Request for Proposals (RFP) or Proposals related to this registration, the termination of any contract related to this registration, and/or the imposition of sanctions against me and/or the firm, as applicable, each subject to ADB's determination, and in any case without any liability to ADB and without prejudice to any other remedies available to ADB.

3 Key Experts

Note: To know more about the qualifications of the Individual Consultants registered in the ADB's CMS, please click on this icon: ⓘ

Show [All] [Go]

Add Key Expert(s)

CMS Number	Last Name	First Name	Country of Birth	Full-Time Firm Expert	Affiliation Status	Details	New File	Delete
	Yumi	Samo	Japan	Yes	Request Sent	4	5	

6. The **Key Experts** screen appears. Change the current option for **Is the Expert registered in CMS?** to **Yes**.
7. Fill in the **CMS Number** field, which should now be visible and change any other details as needed.
8. Click on **OK**.

Key Experts
* Indicates required field [OK] [Cancel] **8**

Signifying affiliation with an expert requires CMS registration for both parties. If the expert is not registered in CMS or you are unsure as to this fact, you may still proceed by choosing "No" to the question below, "Is the expert registered in CMS?"

Is the Expert registered in CMS? Yes No **6**

* CMS Number **7**

* Last Name

* First Name

* Country of Birth







Full-Time Expert of the Firm? Yes No

Click "OK" to send an affiliation request to the expert. If the expert name you entered above is different from the name appearing in the expert's CMS Registration Profile, the latter name will be used instead upon confirmation of the affiliation request.

- Once saved, the responding expert should log into their CMS account and confirm the affiliation request by following [steps 1-4](#) where the recipient is registered in CMS.

Signifying the end of Affiliation with an Individual Consultant

- Either the firm or the expert may choose to signify the end of the affiliation.
- The consulting firm would perform this update through the **Profile** tab, **Key Experts** category.
- Click the **Details** icon to open the Key Experts screen for that specific expert.

Affiliate Organizations					
Show <input type="text" value="All"/> <input type="button" value="Go"/>					
<input type="button" value="Add Affiliate Organization(s)"/>		Previous 1-10 of 24 Next 10			
CMS Number	Organization Name	Country of Incorporation	Affiliation Status	Details	Delete
020761	Aleph Limited	New Zealand	Confirmed		
012917	Consulting Firm 1	India	Confirmed		
012791	DOLSAR Engineering Limited	Turkey	Confirmed		

- Change the Affiliation Status to **Affiliation Ended**.
- Click **OK**.

Key Experts

* Indicates required field

Is the Expert registered in CMS? Yes No

CMS Number

Last Name

First Name

Country of Birth

Full-Time Expert of the Firm? Yes No

* Affiliation Status

4

Withdrawing an Affiliation Request for a Key Expert

1. The sender of the affiliation confirmation request can opt to withdraw the request. This is allowed so long as a response has not been activated yet.
2. Click the **Profile** tab.
3. Click the **Key Experts** category.
4. Click the **Delete** icon to remove the request for the specific expert.
5. Click **Save**.

The screenshot shows the CMS interface for 'Key Experts: IDEA Solutions Inc.'. The 'Profile' tab is selected, and the 'Key Experts' category is highlighted in the left sidebar. A table lists a key expert named Yumi Samo from Japan, with a 'Delete' icon in the 'Delete' column. A red box highlights the 'Delete' icon, and another red box highlights the 'Save' button in the top right corner. A red box also highlights the 'Key Experts' category in the sidebar.

Key Experts: IDEA Solutions Inc.
 Current Status: Active Registration Date: 11-Nov-2009 Profile Last Update Date: 22-Jun-2020

IMPORTANT
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Key Experts

Note: To know more about the qualifications of the Individual Consultants registered in the ADB's CMS, please click on this icon: ⓘ

Show Go

Add Key Expert(s)

CMS Number	Last Name	First Name	Country Of Birth	Full-Time Firm Expert	Affiliation Status	Details	View Profile	Delete
	Yumi	Samo	Japan	Yes	Request Sent			