

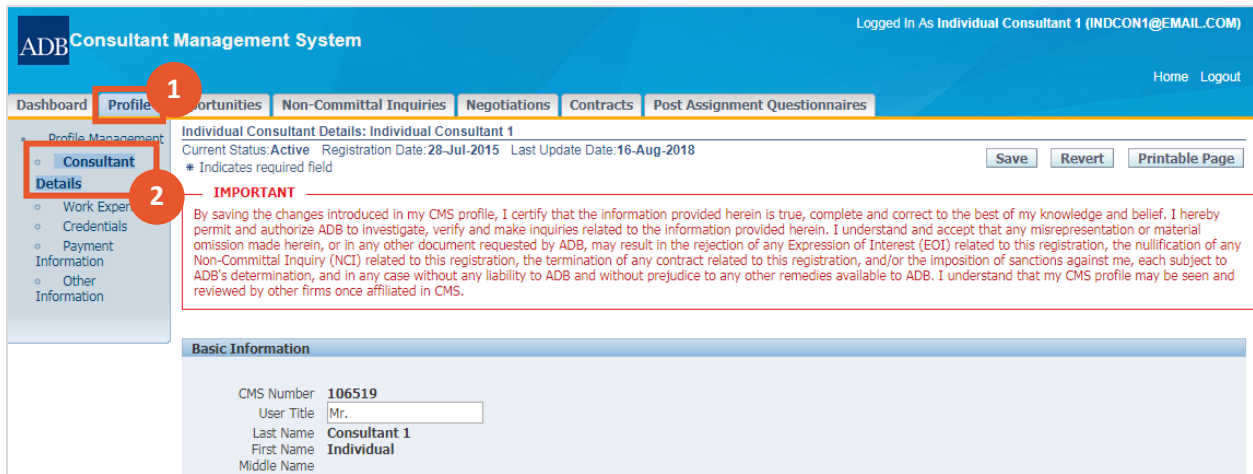
# Key Experts Initiated Affiliations

**Note**

- Signifying affiliation with a firm requires that both the expert and the firm 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.

## Initiating Affiliation Requests

1. Log in to **CMS** (<https://cms.adb.org>) and proceed to the **Profile** tab.
2. Ensure that the **Category** on the left side indicates **Consultant Details**.



3. Scroll down to the **Company Affiliations** section. You can optionally display only those organizations with a particular affiliation status by clicking on the **Show** dropdown box then click on **Go** button.



4. Click on **Add Company Affiliation(s)** button to initiate affiliation request.

5. The **Company Affiliation** screen opens.
6. Choose **Yes** if the Firm receiving the affiliation request is registered in CMS. If unsure, choose **No**, then proceed to **Step 9**.
7. Fill in the rest of the required fields such as **CMS Number**, **Firm Name**, and **Country of Incorporation**. If the Firm is indicated as already registered in CMS, then a **CMS Number** will be required.
8. Indicate whether you are a **Full-Time Expert of the Firm** and if the firm is **allowed to view your CMS Profile**.

9. If the Firm is not yet registered, then no **CMS Number** is needed, but an **Email Address** will have to be provided.

10. Click on **OK**.

**Company Affiliation**

\* Indicates required field

OK Cancel
10

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 Name

\* Country of Incorporation

\* Email Address

Full-Time Expert of the Firm?  Yes  No

Allow this Company to View my Profile?  Yes  No

**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 (Company Affiliations) 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.**

11. At this point, the Affiliation request has already been sent out to the Firm.

*Note*

- If the **Firm is already registered**, the Firm's Primary Contact will have to log in to 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.

## 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**.

The screenshot shows the CMS Dashboard with a navigation bar at the top containing tabs like Dashboard, Profile, Opportunities, etc. Below the navigation bar, there is a tip and an attention notice. The main content area features an 'Action Items' table with columns for Date, Type, Project, Status, and Go To Task. A row is highlighted with a red border, showing a profile request for 'Makoto Rai' with status 'Affiliate Organization'. A red circle with the number '1' is positioned over the 'Go To Task' icon in this row.

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

The screenshot shows the 'Key Experts' configuration screen. It includes a header with the title and a note about required fields. Below, there are several form fields: 'Is the Expert registered in CMS?' (radio buttons for Yes/No), 'CMS Number' (165635), 'Last Name' (Rai), 'First Name' (Makoto), 'Country of Birth' (Japan), and 'Full-Time Expert of the Firm?' (radio buttons for Yes/No). The 'Affiliation Status' field is a dropdown menu that is currently open, showing three options: 'For Confirmation', 'Confirmed', and 'Declined'. A red circle with the number '2' is placed over the 'Confirmed' option. In the top right corner, there are 'OK' and 'Cancel' buttons, with a red circle and the number '3' placed over the 'OK' button.

4. Verify the confirmation under **Profile** tab, **Key Experts** category. The **Confirmed** affiliation status will be displayed for the newly affiliated Key Expert.

**Key Experts:**  
Current Status: Active Registration Date: 28-Mar-2011 Profile Last Update Date: 22-Jun-2020

**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 All Go

Add Key Expert(s)

CMS Number	Last Name	First Name	Country Of Birth	Full-Time Firm Expert	Affiliation Status	Details	View Profile	Delete
057595	Tamaguchi	Taka	Japan	Yes	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, **Consultant Details** category.
4. A line in the **Company Affiliations** section lists the name of the Firm with the status **Request Sent**. There is no **CMS Number** yet associated with that Firm.
5. Click the **Details** icon.

**Company Affiliations**  
Show Affiliation Status Request Sent Go

Add Company Affiliation(s)

CMS Number	Firm Name	Country of Incorporation	Full-Time Firm Expert	Affiliation Status	Allow Firm To View Profile?	Details	Delete
	Japan Planning Inc.	Japan	Yes	Request Sent	<input checked="" type="checkbox"/>	ⓘ	🗑️

6. The **Company Affiliations** 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**.

The screenshot shows the 'Company Affiliation' form with the following fields and options:

- Is the Firm registered in CMS?**  Yes  No
- \* CMS Number** 123456
- \* Firm Name** Japan Planning Inc.
- \* Country of Incorporation** Japan
- Full-Time Expert of the Firm?**  Yes  No
- Allow this Company to View my Profile?**  Yes  No
- Affiliation Status** Request Sent

Annotations: A red circle with '6' points to the 'Is the Firm registered in CMS?' question. A red circle with '7' is at the right side of the form fields. A red circle with '8' is at the 'OK' button.

**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 in to 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 the firm or the expert may choose to signify the end of the affiliation.
2. In the **Profile** tab, **Consultant Details** category, scroll down to the **Company Affiliations** section.
3. Click the **Details** icon to open the Company Affiliations screen for that specific firm.

Company Affiliations							
Show <input type="text" value="All"/> <input type="button" value="Go"/>							
<input type="button" value="Add Company Affiliation(s)"/>							
CMS Number	Firm Name	Country of Incorporation	Full-Time Firm Expert	Affiliation Status	Allow Firm To View Profile?	Details	Delete
007345	IDEA Solutions Inc.	Japan	No	Confirmed	<input checked="" type="checkbox"/>		

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

**Company Affiliation**

\* Indicates required field

Is the Firm registered in CMS?  Yes  No

CMS Number **007345**

Firm Name **IDEA Solutions Inc.**

Country of Incorporation **Japan**

Full-Time Expert of the Firm?  Yes  No

Allow this Company to View my Profile?  Yes  No

\* Affiliation Status

## Withdrawing the Affiliation Request

1. The sender of the affiliation 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 **Consultant Details** category.

Individual Consultant Details: Makoto Rai  
 Current Status: Active Registration Date: 28-Jun-2019 Profile Last Update Date: 23-Jun-2020

**IMPORTANT**  
 By saving the changes introduced in my CMS profile, I certify that the information provided herein is true, complete and correct to the best of my knowledge and belief. 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 Non-Committal Inquiry (NCI) related to this registration, the termination of any contract related to this registration, and/or the imposition of sanctions against me, 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. I understand that my CMS profile may be seen and reviewed by other firms once affiliated in CMS.

**Basic Information**

CMS Number: 165635  
 User Title: Mr.  
 Last Name: Rai  
 First Name: Makoto  
 Middle Name:

4. Scroll to the Company Affiliations sector. Click the **Delete** icon to remove the request for the specific expert.

Company Affiliations

Show: Affiliation Status Request Sent Go

Add Company Affiliation(s)

CMS Number	Firm Name	Country of Incorporation	Full-Time Firm Expert	Affiliation Status	Allow Firm To View Profile?	Details	Delete
	Japan Planning Inc.	Japan	Yes	Request Sent	<input checked="" type="checkbox"/>		

5. Click **Save**.