



## Keep track of your financing statements

### Maintain your own records

It is critical that you maintain records of the various registration numbers and PINs allocated to each registered financing statement. You will need these identifiers whenever you maintain or discharge the financing statement.

It is your responsibility to look after and keep track of your:

- User ID and password
- SPG ID and password
- Financing Statements Numbers and PINs (including Debtor PINs).

Below is an example of a quick template that you could use to record and store the PINs and IDs generated by the PPSR during the registration process. It is easy to set up a spreadsheet similar to the example given below then store it for quick future reference.

| Debtor name | Debtor reference | Financing statement creation date | Financing statement expiry date | Financing statement registration number | Debtor PIN | Financing statement PIN |
|-------------|------------------|-----------------------------------|---------------------------------|---|------------|-------------------------|
|             |                  |                                   |                                 |   |            |                         |
|             | Example only     |                                   |                                 |   |            |                         |
|             |                  |                                   |                                 |   |            |                         |

**Note** | If you do have a problem with a financing statement PIN or cannot recall your Secured Party Group ID or password you can request these details using our [Lost IDs, passwords or PINs service](#).

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## Use the online reporting tools

To help you monitor your registered financing statements you can also create reports on the PPSR for free.

These reports are particularly useful for checking which financing statements are due to expire.

### Notes

- To create reports on the PPSR you will need the Secured Party Group ID and password.
- If you have pop-up blockers installed on your PC, you will need to override or turn them off to view our reports.
- Both of these reports can be displayed in MS Excel format, within a browser window, or sent as a PDF attachment by email.

## Financing Statement List

The Financing Statement List creates a detailed report for your Secured Party Group. You can choose to get a list of the Financing Statements that are due to expire in a given timeframe or those that were registered in a given timeframe.

Included in the report are details of individual financing statements including:

- Financing statement registration number
- Registration date
- Discharge date
- Expiry date

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### Step by step instructions

1. Log on using your User ID and password.
2. From the **Online Services** menu choose **Secured Party Tools** then **Financing Statement List**.
3. Enter the Secured Party Group ID and password then click the **Continue** button.
4. If you want a list of Financing Statements that are due to expire, enter:
  - Both the start and end dates to determine the period that you want the list to cover or
  - The first Financing Statement Number that you want included in the list.
5. If you want a list of Financing Statements that were registered over a specific period of time, enter:
  - Both the start and end dates to determine the period that you want to list to cover or
  - The first Financing Statement Number that you want included in the list.
6. Choose whether you want to receive the report in PDF or MS Excel format. The default option is to receive the report in PDF format via email and your email address will be automatically entered based on your User ID. If you would prefer to see the report in MS Excel format, tick the checkbox and delete the email address. If your list is likely to contain more than 2000 entries you will need to choose the MS Excel format.
7. Click on the **Deliver** button to receive your report.

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## Registered Financing Statement Report

The Registered Financing Statement Report creates a summary style report giving you the total registrations for the various registration options over a given month and year.

For example, you will see the number of new and pending registrations along with how many discharges were registered. You will also see how many financing statements expired and how many remain on the register. You will not, however, see any details of the financing statements themselves.

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### Step by step instructions

1. Log on using your User ID and password.
2. From the **Online Services** menu choose **Secured Party Tools** then **Registered Financing Statement Report**.
3. Enter the Secured Party Group ID and password then click the **Continue** button.
4. Enter the month and year that you want the report to cover.
5. Choose whether you want to receive the report in PDF or MS Excel format. The default option is to receive the report in PDF format via email and your email address will be automatically entered based on your User ID. If you would prefer to see the report in MS Excel format, tick the checkbox and delete the email address.
6. Click on the **Deliver** button to receive your report.