



Applying for the MarinTrust Chain of Custody Standard via the online application form

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Purpose and Scope

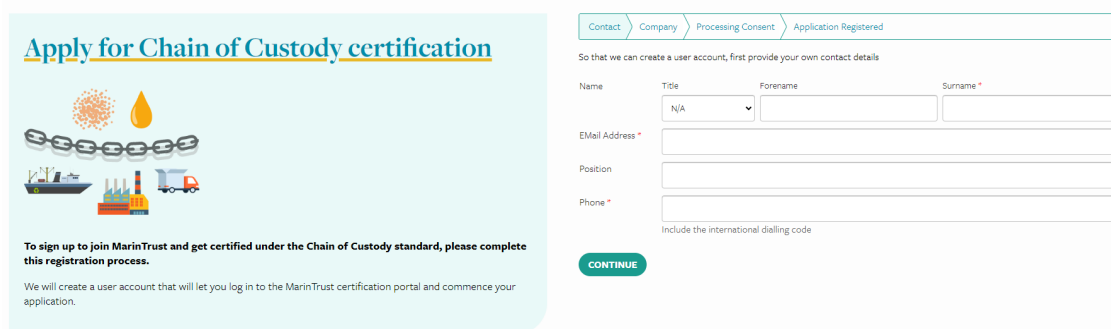
This document provides a step-by-step guide to the MarinTrust online application portal for the MarinTrust Chain of Custody Standard. This guide is divided into two sections – the first section is for new applicants, and the second section is for existing certificate holders.

1. New applicants

If you are applying for the MarinTrust Chain of Custody for the first time, please follow the steps below.

1.1 Accessing the portal

- Access the MarinTrust online application portal here: <https://marintrust.casi.services/login.eb?goto=%2fhome.eb>
- Click 'Apply for Chain of Custody certification'.
- Enter your name, email address, position in the company and telephone number. Click 'Continue'. **Please note that the online application form must be completed in English.**



- Enter your company details. If your company has a website, please provide the url. Remember that these details relate to your company headquarters, which may not necessarily be the same address as the individual facility or facilities that you wish to be audited. Click 'Continue'.
- Tick the boxes to confirm data processing consent and click 'Confirm'.
- You should now receive two emails. One confirming your registration, and the other with your username and password.
- In the latter email click 'Access Portal'. This will open a new browser window to the login page of the online portal. Enter your login details.

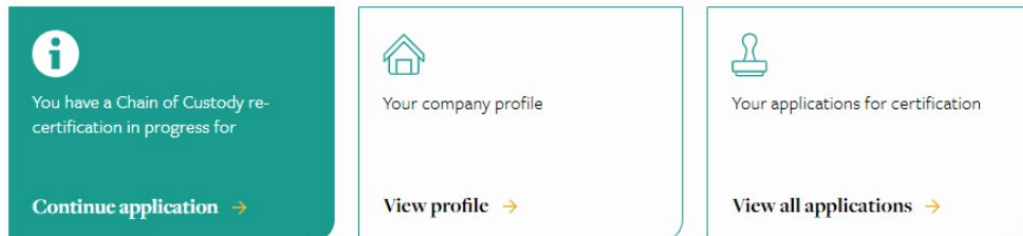
1.2 Pre-approval facility information

- You are now logged into the MarinTrust portal. From here you can view your company profile (the details you have just entered) and you will be able to view all your future application details.

- Click the panel that says, 'Continue application':

Welcome to the MarinTrust Portal

Use this portal to view and submit information relating to your company's MarinTrust certification or Improver Programme acceptance.



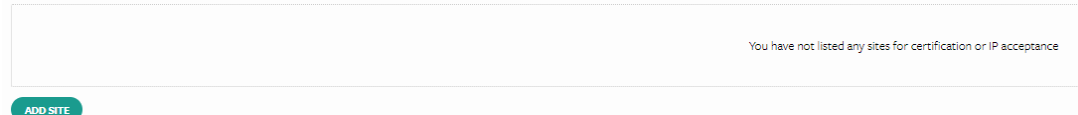
The dashboard features three primary panels:

- Chain of Custody re-certification:** A teal panel with an information icon, stating "You have a Chain of Custody re-certification in progress for" and a "Continue application" button with a right-pointing arrow.
- Your company profile:** A white panel with a house icon, stating "Your company profile" and a "View profile" button with a right-pointing arrow.
- Your applications for certification:** A white panel with a paperclip icon, stating "Your applications for certification" and a "View all applications" button with a right-pointing arrow.

- You now need to enter details relating to the specific facility or facilities you wish to be audited.
- Click 'Add site' (shortly to be renamed 'Add facility'). A side menu will open up in which you can enter the facility details. Once you have completed all the fields click 'Add site' in the side menu.
- If this is a multi-facility application, continue to click 'Add site' until you have added all the facilities you wish to be audited.

Certification and Improver Programme acceptance

List the sites that you want to be audited. If applying for re-certification, a new audit cycle under the IP, or a scope change, sites that are certified or accepted will already be listed, so please check that the list is correct and up-to-date.



The form area shows a green "ADD SITE" button and a large empty table with the text "You have not listed any sites for certification or IP acceptance" centered at the bottom.

- Select your preferred Certification Body: Acoura Marine Ltd (trading as LRQA), NSF International or SGS del Perú S.A.C.
- Click 'Add contact' to add an invoicing contact. Again, a side menu will open up in which you can enter these details. Once you have entered all the fields click 'Add contact' in the side menu.
- Select your preferred currency (£/\$/€) and click 'Submit'.
- A message will appear beneath your chosen CB on the application page: 'Please wait for MarinTrust to review your submitted list of facilities'.

Screenshots with required pre-approval details:

Certification Body

Select your preferred Certification Body:

- Acoura Marine Ltd (trading as LRQA)
- NSF International
- SGS del Perú S.A.C

Invoicing

Make sure you have listed the correct contacts for invoicing. These details will also be passed onto your preferred Certification Body.

ADD CONTACT

Invoicing Currency

Select your preferred currency for invoicing

- UK Sterling (£)
- US Dollars (\$)
- Euros (€)

SUBMIT

Submit your list of sites for approval

1.3 Overview/Structure and Operations

- Once MarinTrust has checked and confirmed your details you will receive another email asking you to continue your application.

Please continue your Application for MarinTrust certification

We have now reviewed the information you have supplied so far, and you may proceed to complete your application form.

- Now when you log in, the 'please wait' message will have disappeared, and you will see a link to an application form beneath the details of the facility or facilities you have entered.

Application for

✓ Pre-approval

During pre-approval you are asked to provide the list of sites that you want to be audited. These will be reviewed by the MarinTrust secretariat before you can proceed to submit your application. You will also need to indicate your preferred Certification Body, provide details of your invoicing contacts and sign the declaration.

✓ Submit application form

Complete and submit the application forms as required for the sites to be audited. These will also be reviewed by the MarinTrust secretariat and, if any further information is required, you may be sent a revision request asking you to update your answers.

✓ Sign the declaration

You will need to review and sign the declaration before your application is accepted

✓ Invoicing and payment

You will be sent an invoice. Once paid, the information you have supplied will be passed on to your preferred Certification Body.

✓ Await outcome from Certification Body

Your Certification Body will communicate with you directly in order to arrange any audits that are required prior to certification or IP acceptance.

✓ Application complete

Certification and Improver Programme acceptance

For certification under the MarinTrust Chain of Custody standard, we require only a single application to be completed even if it is to cover multiple sites.

Application has not been started

Application has not been started

APPLICATION FORM

- You will also see the declaration wording at the bottom of the page. Please enter your name in the 'Signatory Name' box and click 'I agree'. Alternatively, you can sign the declaration once you have submitted the form or forms for your facilities – simply click 'Your applications' at the top of the page, then click on the 'Initial application' link for your company to be taken back to the summary page for your facility application(s).

Declaration

- I understand the requirements of the MarinTrust Standard and that the information supplied in this application form will be used by the MarinTrust Secretariat and any of the approved Certification Bodies to determine the full assessment requirements for the applicant and associated costs.
- I understand that failure to inform MarinTrust of any changes in the scope of the certification or IP acceptance may incur extra costs and may result in inaccuracies in the certificate or IP acceptance scope.

Signatory Name

Enter your full name to confirm your agreement

I AGREE

Click to record your agreement with the terms of the declaration



Pre-approval

During pre-approval you are asked to provide the list of sites that you want to be audited. These will be reviewed by the MarinTrust secretariat before you can proceed to submit your application. You will also need to indicate your preferred Certification Body, provide details of your invoicing contacts and sign the declaration.



Submit application form

Complete and submit the application forms as required for the sites to be audited.

These will also be reviewed by the MarinTrust secretariat and, if any further information is required, you may be sent a revision request asking you to update your answers.



Sign the declaration

You will need to review and sign the declaration before your application is accepted

- Clicking the 'Application form' link will take you to the 'Overview' page. You can click back to this page at any stage of the application to check your progress. Throughout the completion of the form, and before you finally submit, you will be notified if there is anything you have missed. Completed sections will appear green. You will notice that a portion of the 'Sites and Subcontractors' (shortly to be renamed 'Facilities and Subcontractors') progress bar is already green – this is because it has been pre-populated with the facility(ies) information you entered in the pre-approval stage.

- Click 'Start' to begin filling in the application form. This will take you through to 'Structure and Operations' (alternatively you can click on 'Structure and Operations' from the overview page, either in the heading above the process bar, or in the navigational links at the top of the page).

The screenshot shows the top navigation bar with the following links: Overview, Structure and Operations (highlighted with a yellow box), Sites and Subcontractors (with a green checkmark), Products and Materials, External Certifications, and Declarations. Below the navigation bar, there is a progress indicator with sections: Structure and Operations (highlighted with a yellow box), Sites and Subcontractors, Products and Materials, External Certifications, and Declarations. At the bottom of the form, there is a green 'START' button (highlighted with a yellow box) with the text 'Click to start filling out your application form'.

This is an application for certification against MarinTrust Chain of Custody (CoC) Standard version 2.

You will be asked a number of questions in the Structure and Operations sections that will determine which further elements of the form require completion.

You will also be asked to upload supporting documentation for some of your answers. Please ensure that you have copies of key documents such as your business organogram, process flow chart and any relevant third-party certifications.

! You should start now and submit your form before 16/10/2024

Your form is now ready to be completed and should be submitted for review in advance of the quoted deadline. Begin the process by clicking the start button below.

- **1.1:** The first question relates to your company’s activities. Please tick the relevant boxes: Processing, Trading, Storage and distribution, Packing or repacking, Other – if ‘other’ please enter the information in the freeform box below. Remember to tick ‘Check this box when your answer is complete’.
- **1.2 – 1.5:** Now complete the questions relating to legal ownership of MarinTrust certified material, subcontracted facilities, the Identity Preserve Model, and whether you handle marine ingredients for use in a product for direct human consumption. The answers you give here will affect the later elements of the form. For example, if you tick that you make use of a subcontracted facility, you will need to fill in information relating to this facility in the next section.
 - A subcontractor is a third party or affiliate that is appointed under a contract or agreement to carry out work on MarinTrust compliant material only for the applicant.
 - Further information about Identity Preserve Model can be found here: <https://www.marin-trust.com/our-value-chain/chain-custody/get-chain-custody-certified>

- **1.6:** You will also need to upload some documents relating to your company’s operation: an organigram, a process flow chart, and a description of product specification – fishmeal, fish oil and other marine ingredients – **you may upload multiple documents here**. You can upload any other relevant documents under ‘Further documents’. Remember to tick ‘Check this box when your answer is complete’ before clicking ‘Next section’.

Please supply any additional information that will provide the Certification Body with a better understanding of your business

This answer is complete.

Organigram*	Organigram Test.docx	Clear
Process flow chart*	Process flow chart Test.docx	Clear
Product specification (If you need to attach more than one document, please upload them under 'further documents')*	Fish oil product specification test.docx	Clear
Further details	<div style="border: 1px solid #ccc; height: 30px;"></div>	
Further documents	Fishmeal product specification test.docx	Remove

Add a file to this answer from your document vault
 Drop files above or [browse your computer](#) to upload a file

Check this box when your answer is complete

1.4 Facilities and Subcontractors

- In this section you will need to add further details for the facility(ies) you wish to be audited. You will find that the table has been prepopulated with the basic facility information that you provided in the preapproval stage. Please enter further details in the table relating to the facility-specific products purchased and sold, and facility contact details in the table. To do this, click on a row – this will open up a side menu in which you can enter details relating to number of staff, product purchased, facility activities, product sold, and key contact details.
- If the facility purchases or sells ‘other’ marine ingredients (i.e. not fishmeal or fish oil), please provide these details in the relevant boxes.
- If you ticked ‘Yes’ in the previous section to the questions about subcontracted facilities and the Identity Preserve Model, there will be additional tables to complete on this page. For subcontracted facilities you will also need to upload relevant certification documents.
- Please remember to tick ‘Check this box when your answer is complete’ after completing each question and before continuing to the next section.

1.5 Products and Materials

- In this section, it is required that you enter more company-specific information. In the first question, please detail the marine ingredients the company handles (although you will have entered similar information in the facility-specific questions above, a company overview is also required).

- In the table, please provide details of your material providers.

Check this box when your answer is complete

List the specific products and providers of the marine ingredients that you handle

List of Material Providers

Site name	Site address	Site country	Certification held	Certificate or reference number	Product	Other Product
+ Add Row...						

Give the relevant certificate or reference number

Add a supplier

Find the site. Select the correct country first and then start typing their name to see matches.

Country
Select country...

Company or site name

The name you enter should match that shown on your suppliers MarinTrust certificate.

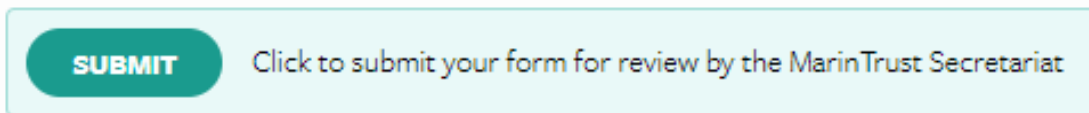
- Click ‘add row’ – this will bring up a side menu. Select the relevant company for your supplier. Start typing the name of the company in the dialogue box and an autosuggestion should appear based on the current database of MarinTrust certified producers. To check the current list, please visit the MarinTrust website:
 - Certified facilities under the MarinTrust Factory Standard: <https://www.marin-trust.com/marintrust-factory-standard/certified-facilities-under-marintrust-factory-standard>
 - Accepted facilities under the Improver Programme: <https://www.marin-trust.com/improver-programme/accepted-facilities-under-improver-programme>
- Click on the autosuggested facility and complete the remaining details in the side table: certificate number and products handled (remember to define any ‘other’ ingredients if they are not fishmeal or fish oil).
- Continue to add rows to the table until you have detailed all relevant suppliers.
- Remember to tick ‘Check when your answer is complete’ at the bottom of each question before clicking ‘Next section’.

1.6 External Certifications/Declarations

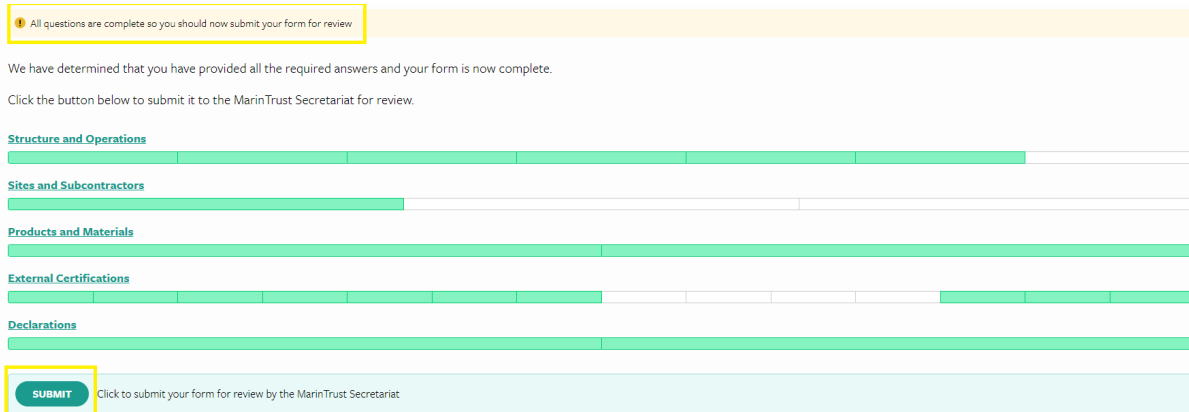
- In the ‘External Certifications’ section, please provide details of third-party certifications. The options available to you in this section will be based on the answer you provided in ‘Structure and Operations’ about whether you handle marine ingredients for use in a product for direct human consumption.
- If you tick ‘Yes’ to any of the third-party certification ‘options’, please upload the certificate, and provide the certification number and expiry date.
- Once all relevant certificates have been uploaded, click ‘Next Section’.
- In the ‘Declarations’ section, check the boxes, sign, and tick ‘Check when your answer is complete’. Then sign the out-of-scope declaration.

1.7 Submitting the form – review and revisions

- If all fields have been successfully completed, a ‘Submit’ button will appear beneath the out-of-scope declaration with the message, ‘Click to submit your form for review by the MarinTrust Secretariat’. If there are still fields that need to be completed, click ‘Return to overview’.



- In the overview, all complete questions in the progress bars are green and incomplete questions are orange. Clicking on the orange progress bar will take you to the question that needs to be completed. White progress bars refer to questions which are not relevant to your application – for example, if in Structure and Operations you ticked that you do not make use of a subcontracted facility then the second progress bar in ‘Sites and Subcontractors’ will be white to indicate that this table is not required.
- If all relevant fields in the form have been completed, the corresponding progress bars should all be green, and you will see the following message on the overview page: ‘All questions are complete so you should now submit your form for review’. Click ‘Submit’ at the bottom of the page.



- You will receive an email to confirm submission, and you will see the message ‘Application is awaiting review by MarinTrust’ beneath the application form link(s) on the application homepage. Please note that text relating to company and facility names has been removed from the images below.

Your application form for [redacted] has been submitted

Thank you for your completed application form.

Company	Standard MarinTrust Chain of Custody
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We will now review all the information you have provided for your application.

If any amendments or corrections are required, we will send you a revision request via email.

- The application will then come through to MarinTrust to check.
- If MarinTrust finds any issues or errors with the application form, they will flag them and send the form back for revision, in which case, you will receive an email explaining that the form needs to be corrected.

Your application form for [redacted] requires revision

We have reviewed the information you have supplied so far, but in order to approve your application we require you to revise some of the information you have provided.

Company	Standard MarinTrust Chain of Custody
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Return to the MarinTrust Certification Portal by clicking the button below to review the required changes and re-submit your application form.

Once logged back in, you will see full details of the requested changes for this application form. The comments can be found above the progress bars on the overview page.

Once you have updated your answers, remember to re-submit the form for further review.

**REVISE APPLICATION
FORM**

- When you log back in to the portal, go to ‘Your applications’ and click on the link for your application. The application overview will now have red progress bars to indicate the areas of the form that need to be corrected. Be aware that, in the revision stage, the only questions on the form that you will be able amend or change are the ones which have been flagged by MarinTrust.

- MarinTrust will leave a comment against each section that requires revision, providing detailed guidance on the necessary changes. MarinTrust may also leave a comment on the overview page above the progress bars explaining what changes need to be made.

! Your form requires revision by 29/09/2024

Your form has been returned for revision. Please check the comments shown below and underneath the questions flagged red.

After you have updated your answers, resubmit the form for further review by the quoted deadline.

Comments	Date	Message
	25 Sep 2024 14:07	Please amend sites table

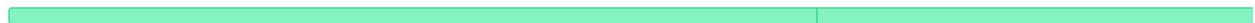
Structure and Operations



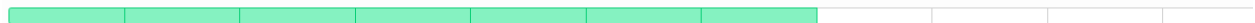
Sites and Subcontractors



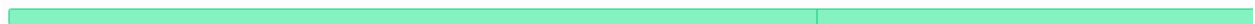
Products and Materials



External Certifications



Declarations



- Once you have corrected the changes, please resubmit the form. Please note that the 'Submit' button will not appear if there is missing information in the application form. Please ensure all required fields are completed in order for the button to display.
- You will receive an email to confirm resubmission.
- The review and revision process may be repeated until MarinTrust are happy that the form is entirely correct.
- Once this process is complete, you will receive an email confirming that your online application has been approved. This email will also detail how you will be invoiced.

Your application form has been approved

This notification is to confirm that your application form has been approved.

Company	Standard MarinTrust Chain of Custody
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Shortly, you will receive an invoice for MarinTrust administrative cost. The invoice will be sent electronically from Xero and will come from the email address account@marin-trust.com. If you have any questions about the invoice, please feel free to contact us at standard@marin-trust.com

Once we receive your payment, we will proceed to forward your application to your preferred Certification Body (CB). The CB will then reach out to you within 9 working days for further clarification (if needed) and to schedule an audit date. Please note that the certification process may take up to 3 months, depending on the auditors' availability.

1.8 Invoicing and certification

- Upon receiving the payment for the MarinTrust administrative cost, you will receive a confirmation email. Your application will be sent to your preferred CB within 24 working hours.

Thank you for payment

We have now received payment for your recent Application.

Company	Standard MarinTrust Chain of Custody
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We will now pass on your completed application form to your chosen certification body.

For applications and re-certifications (and if required for a scope change) the certification body will contact you directly to arrange an audit.

- For further guidance on the MarinTrust certification process, please refer to the following document: [Chain of Custody Standard – Roadmap to certification](#).
- For quick answers to common questions, please visit our [FAQs section](#). If you can't find the answer that you are looking for, please email us at standards@marin-trust.com.

2. Existing certificate holders

If you are already a certificate holder of the MarinTrust Chain of Custody Standard, you can use the MarinTrust online application form to apply for access, submit scope extension requests and, every three years, complete a Chain of Custody Standard recertification form.

2.1 Applying for access

If your company is already certified by the MarinTrust Chain of Custody Standard, you can apply for access to the online portal in order to apply for scope extension requests and complete recertifications. You can also apply for access if your company has already registered on the online portal, and you wish to create a new user account under the company profile.

- Access the MarinTrust online application portal here:
<https://marintrust.casi.services/login.eb?goto=%2fhome.eb>

- Click 'Apply for access'

Apply for access

If you are already certified under a MarinTrust Standard or accepted under the MarinTrust Improver Programme but don't yet have an account, you may apply for access to your company profile.

Once approved, you will be able to:

- View your company profile and contacts
- Submit the information and documents needed for your application, re-certification or new audit cycle under the IP
- Make a change-of-scope request

APPLY FOR ACCESS

- On the next page, please enter your name and contact details. Click 'Continue'.
- On the next page you will be asked to provide more information about your company, including the address and postcode. This is so the information you input can be matched to the details in our database.
- You will then be taken to the following screen:

Apply for access

[Edit Content](#)

Your request for access requires approval

As we were unable to exactly match the details you provided to any of the contact information we hold in our system, your request has been sent to the MarinTrust Secretariat for approval.

Once your request has been reviewed and approved, you will be sent an email containing your new username and password to use with the portal.

[Edit Content](#)

- This request will then come through to MarinTrust who will review your request.
- If approved, you will receive an email with your username and password. You can now log into your company profile.

2.2 Recertifications

The recertification process is automated. MarinTrust sends out recertification requests in the first week of each month to every company whose certificate is due to expire within six months.

- When your certificate is due to expire within six months you will receive an email asking you to recertify. These emails are sent out at the beginning of each month.

- Either follow the 'Start re-certification' link in the email or access the MarinTrust online application portal here: <https://marintrust.casi.services/login.eb?goto=%2fhome.eb>
- Log in with your username and password under 'Existing users'.
- Click on 'Company profile' in the top right of the page. From here you can see current details about your company, including address, contacts, and completed application details.
- Under 'Certification and Improver Programme Acceptance Processes' you will see a link to your current and historic applications. Click on the 'Recertification' link. You can also access this information by going to 'Your applications' at the top of the page.
- Clicking on the recertification link will take you to page detailing your company-level details, facility information, CB, invoicing contact and invoicing currency. Please amend or confirm these details as required and click 'Submit' – the process is defined above in section 1.2. Note that you can additional facilities to be audited at this stage.
- Submitting the form will open up a declaration for you to sign and a link to the application form relating to your certified facility or facilities.
- If you are recertifying for the first time on the online form, you will need to input the details about each facility in the form. By the time you come to recertify this information will be prepopulated and you will only have to confirm the data, unless you wish to make changes.
- To complete the form, please follow steps 1.3 to 1.8 as described above.

2.3 Scope extension requests

In order to request a change of scope to your certificate, please follow these steps:

- Access the MarinTrust online application portal here: <https://marintrust.casi.services/login.eb?goto=%2fhome.eb>
- Log in with your username and password under 'Existing users'.
- Click on 'Company profile' in the top right of the page. From here you can see current details about your company, including address, contacts, and completed application details.

- At the bottom of the page, under ‘Certificates and Acceptance Documents Issued’, you will find details of your current certificates, along with their expiry dates. Please click on the ‘Apply for a change of scope’ link to the right of the current certificate that you wish to change. You will then see the following options:

Apply for a scope extension

To start the process to apply for a scope extension, first select the details that you wish to change. A new application form will then be set up for you to provide the updated details.

- Company name or address change
- Invoicing contacts or preferred currency
- Change of registered sites information
- Change of company activities
- Change of product description
- Change of subcontractor information
- Change of MarinTrust compliant providers
- Additional business info (process maps etc.)
- Change of legal ownership
- Other request

- Be aware that you can choose multiple options within the same scope extension request. Please choose the required option(s) and click ‘Apply’. The form will be based on the options select here – in other words, you will not have to fill out a complete form, you will only have to submit details based on the criteria you have selected.
- Scope extensions relating to company name and address change, and invoicing contacts or preferred currency are company-level requests. Therefore, if you select these options, you will be taken to an overview of your company details (as opposed to details relating to a specific facility). Please edit the details as required and click ‘Submit’. This will bring up a declaration. Please, read, sign and click ‘I agree’. The request will then come through to MarinTrust to approve.
- Scope extensions relating to the following categories are facility-level requests:
 - Change of registered facilities information
 - Change of company activities
 - Change of product description
 - Change of subcontractor information
 - Change of MarinTrust compliant provider
 - Additional business info (process maps etc.)
 - Change of legal ownership
- Therefore, they will take you to an optimised version of the application form for the facility. Please follow the steps 1.3 to 1.8 above in order to complete information relating to these categories.
- If the reason for your scope extension is not listed above, please select ‘Other request’. This will take you to a freeform textbox where you can specify the nature of your request. As with other types of scope extension, you will be taken to a declaration to sign before submitting.

AMENDMENT LOG

DATE	ISSUE	AMENDMENT	AUTHORISED BY
23/01/2025	V1.1	Change of terminology – ‘sites’ to ‘facilities’	NC