



PENSION BULLETIN 2017-03

To : Pension Plan Administrators

Re : Online Pension Filing System - Generic Portal Users

Date: 30 November 2017

As you are aware from Pension Bulletins 2017-01 and 2017-02, FCNB's new online portal for applications and filings under the *Pension Benefits Act* is now live and paper filings are no longer being accepted. As part of the move to the new online system, all pension plan administrators are required to set up an account at <https://portal.fcncb.ca>

Some pension plan administrators and delegates have requested additional functionality with respect to how user accounts for making filings in the portal may be used. Under the portal user agreement every account must be connected to a specific person, so that the terms of the agreement bind that person.

Some pension plan administrators and delegates experience regular staff rotation for the portal users assigned to complete filings, and have requested whether it is possible to create "generic" accounts, the credentials for which could be passed from user to user within a specific organization.

Guidance

FCNB staff has reviewed the issue and are prepared to permit generic accounts within the portal, provided certain conditions are met.

The process and conditions/requirements are as follows:

1. A pension plan administrator or delegate requiring one or more generic accounts must make a request for the account(s) in writing, addressed to the Deputy Director, Pensions. The written request must indicate the proposed email(s) to be used by the generic account(s).
2. The written request must confirm that the requesting organization assumes responsibility for ensuring that every user who logs into the FCNB portal using the generic account(s), has been provided with a copy of the FCNB portal agreement and

has agreed to abide by it, in writing. The requesting organization must maintain appropriate records with respect thereto.

3. The requesting organization must implement an appropriate process to ensure that the generic account credentials are only provided to staff within its organization who have agreed to the terms of the FCNB portal user agreement.
4. The requesting organization must maintain a complete log of all users who have been provided access to the generic account(s), including particulars of the time period(s) during which access was granted to a particular person. This log must be made available to FCNB staff upon request.
5. The requesting organization must confirm in writing that it assumes any and all liability accruing to any user of the generic account(s), in connection with the use of the generic account(s) on the FCNB portal.

Once an organization has been authorized to create a generic account, the account profile for that account should be completed as follows:

Field:	Enter:
Organization Name	The name of the organization
Title	Leave blank
First name	Generic1, Generic2, etc. (one for each account created)
Last name	The name of the organization
Gender	Male
Date of birth	01/01/1990
Address	Address of the organization
City	City of the organization
Province	Province of organization
Country	Country of organization
Postal Code	Postal code of organization
E-mail	The generic email address provided in the request
Phone number	A phone number where enquiries about the generic account use may be directed
Fax number	Optional
I agree to the portal terms of use	Check box