

## **ONLINE SERVICES**

### **INSTRUCTIONS FOR:**

- **UPDATING BOARD MEMBERS AND SIGNING OFFICER**
- **ADDING A NEW BOARD MEMBER / SIGNING OFFICER**
- **ADDING A SIGNATURE FORM FOR SIGNING OFFICER**
- **EDITING AN EXISTING BOARD MEMBER / SIGNING OFFICER**
- **MAKING CHANGES TO THE APPLICATION ADMINISTRATOR**
- **REVIEWING SUBMITTED REQUESTS**
- **REVIEWING AND UPDATING GENERAL SERVICES**
- **REVIEWING SERVICE OFFERINGS**

## UPDATING BOARD MEMBERS AND SIGNING OFFICERS

To update board members and signing officers you must be a budget submitter.

1. Log in to Online Services  
(Use the user ID and password given to you by your agency's Application Administrator. If you are the Application Administrator, you must assign the budget submitter role to yourself.)
2. Click on the "Registry Tab"
3. Click "Agency"
4. Click "Board Members and Signing Officers"  
Now you can see who your current board members are and who is identified as a signing officer. A checkmark in the "Signing Officer" box indicates that this person has signing authority for your organization.

**TORONTO** Children's Services : Online

Home Budget Registry User Management A+ A A-

Agency Group Centre

Board Members & Signing Officers My Submitted Requests

FERNCLIFF DAYCARE AND AFTER SCHOOL GROUP ( ID: 1022 )

**Current Board Members and Signing Officers of the Corporation:**

Last Name	First Name	Position Title	Address	Phone Number	Board Member	Signing Officer	Signature Form	Select
<a href="#">AA_LastNa</a>	AA_FirstNa	Board Member	55 JOHN ST TORONTO ON M5V 3C6		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">SIGNATURE FORM.pdf</a> 18-Jun-2010 14:55:28 <a href="#">SIGNATURE FORM.pdf</a> 18-Jun-2010 14:55:22 <a href="#">SIGNATURE FORM.pdf</a> 18-Jun-2010 14:54:21	<input type="checkbox"/>
<a href="#">Bullock</a>	Avery	Deputy Director	10 KELFIELD ST ETOBICOKE ON M9W 5A2		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">SIGNATURE FORM.pdf</a> 30-Jun-2010 14:01:41	<input type="checkbox"/>
<a href="#">skywalker</a>	luke	Controller	3400 MIDLAND AVE SCARBOROUGH ON M1V 4V6	4165555555	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>

[Delete Selected](#)

[Add New Board Member / Signing Officer](#)

**Application Administrator**

**Signing Officers:** You must either attach a scanned copy of a signed authorization form or mail it to your Budget Consultant.

Last Name:  First Name:  User Id:

SIGNATURE FORM	UPLOADED ON
<a href="#">AUTHORIZATION_FORM.pdf</a>	02-Jul-2010 10:11:58

[Edit Application Administrator](#)

If a signature form has been submitted, it can be viewed by clicking on the link under each person's name.

Information about your Application Administrator is also displayed at the bottom of the screen.

## ADDING A NEW BOARD MEMBER / SIGNING OFFICER

1. Click on “Add New Board Member / Signing Officer”.
2. Enter the Board Member’s first and last name in the fields provided. Use full legal names.
3. Select a position title from the list. If the person has more than one position, choose the most senior position.
4. Check the appropriate box to indicate if the person is a board member or also a signing officer of the organization.
5. Enter the address by typing the postal code and click on the GO button.

The system will automatically show the street name, City and Province information for that postal code.

6. Enter the street number, the apartment or unit number and phone number

**TORONTO** Children's Services : Online

Home Budget Registry User Management A+ A A-

Agency Group Centre

Board Members & Signing Officers My Submitted Requests

FERNCLIFF AGENCY (ID: 1022)

**Add New Board Member / Signing Officer**

Signing Officers: You must either attach a scanned copy of a completed Signature Form or mail it to Quality Assurance.

**Details**

First Name: Joe Last Name: Smith Position Title: Director  Board Member  Signing Officer

**Please enter your postal code and click on GO> to load your address:**

Postal Code: [ ] GO>

Street Nbr: [ ] Street Name: [ ]

City: [ ] Province: [ ] Country: CANADA

Apt / Unit: [ ] Phone Number: [ ]

**Signature Form: (required for signing officers)**

Attach scanned copy of the completed Signature Form: ([Download blank Signature Form with upload instructions.](#))

[ ] Browse... [ ] Upload

**SIGNATURE FORM** **UPLOADED ON**

Mail the Form to Quality Assurance: ([Download blank Signature Form with mailing instructions.](#))

Send the Signature Form with the Signing Officer's original signature

Add Board Member / Signing Officer Cancel

## **ADDING A SIGNATURE FORM FOR SIGNING OFFICERS**

There are 2 ways of doing this:

### **Option One (if you have a scanner):**

1. Download the signature form
2. Signing Officer completes the form
3. Scan the form and save it to your computer
4. Select the "Attach Copy of the Completed Signature Form"
5. Click on the "Browse" button to look for the scanned file on your computer
6. Click on "OK" once you have found it
7. Click on the "Attach" button to have this file attached to this request.

Remember that an original ink signature is required on the form. We do not accept typed or electronic signatures.

### **Option Two (no scanner):**

1. Select the "Mail the Form to Quality Assurance" option

Don't forget to mail us the completed form with an original signature or your request will not be completed.

2. Complete the form
3. Select correct option for the Signature Form
4. Click on the "Add Board Member / Signing Officer" button at the bottom of the screen.

This will bring you back to the Board Members and Signing Officers page, where you can see the person you just added as a pending request; If you have more Board Members to add, repeat the process before clicking on the submit button.

5. Click on the submit button once all Board Members and Signing Officers have been added and all changes have been made

You can review the status of your request by going into the "My Submitted Requests" tab in the Registry Menu.

## EDITING AN EXISTING BOARD MEMBER / SIGNING OFFICER

You can make changes to an existing Board Member by:

1. Clicking on the person's Last Name
2. Now you see "Edit Board Member" Screen
3. Change the information you require
4. Add or update a Signature Form to their profile if required

Changes to a person's first or last name or position title will require you to submit a new Signature Form.

5. Click on the "Save Changes" button
6. Click the "Submit for Review" button once you have made all the changes.

**FERNCLEIFF AGENCY (ID: 1022)**

**Edit Board Member / Signing Officer**

Signing Officers: You must either attach a scanned copy of a completed Signature Form or mail it to Quality Assurance.

**Details**

First Name:  Last Name:  Position Title:   Board Member  Signing Officer

**Please enter your postal code and click on GO> to load your address:**

Postal Code:

Street Nbr.:  Street Name:   
 City:  Province:  Country:   
 Apt / Unit:  Phone Number:

**Signature Form: (required for signing officers)**

Use the Form currently uploaded (for Address and Phone Number changes only)  
 Attach scanned copy of the completed Signature Form: ([Download blank Signature Form with upload instructions.](#))

SIGNATURE FORM	UPLOADED ON
<a href="#">SIGNATURE_FORM.pdf</a>	18-Jun-2010 14:55:26
<a href="#">SIGNATURE_FORM.pdf</a>	18-Jun-2010 14:55:22
<a href="#">SIGNATURE_FORM.pdf</a>	18-Jun-2010 14:54:21

Mail the Form to Quality Assurance: ([Download blank Signature Form with mailing instructions.](#))  
 Send the Signature Form with the Signing Officer's original signature

## MAKING CHANGES TO THE APPLICATION ADMINISTRATOR

You can make changes to your Application Administrator by:

1. Clicking on the “Edit Application Administrator” button in the Board Members and Signing Officers page
2. This will bring you to the “Edit Application Administrator” screen
3. Edit or change the Administrator’s Name, Signing Officer Status or update the Authorization Form.

FERNCLIFF DAYCARE AND AFTER SCHOOL GROUP ( ID: 1022 )

**Edit Application Administrator**  
**Note that if you change the Application Administrator's name, a new User ID will be issued.**

Details

First Name:  Last Name:  User ID:

Application Administrator is also a Board Member

**Position Title (Other than Application Administrator)**

**Address Please enter your postal code and click on GO> to load your address:**  
 Postal Code:

Street Nbr:  Street Name:   
 City:  Province:  Country:   
 Apt / Unit:  Phone Number:

Application Administrator is also a Signing Officer

**Signature Form: (required for signing officers)**

Use the Form currently uploaded (for Address and Phone Number changes only)  
 Attach scanned copy of the completed Signature Form: ([Download blank Signature Form with upload instructions.](#))

SIGNATURE FORM	UPLOADED ON
AUTHORIZATION_FORM.pdf	02-Jul-2010 10:11:55

Mail the Form to Quality Assurance ([Download blank Signature Form with mailing instructions.](#))  
 Send the Signature Form with the Signing Officer's original signature

**Signed Authorization Form: (for Application Administrator Role)**

Mail a New Form to Quality Assurance ([Download blank Authorization Form with mailing instructions](#))  
 Use the Form currently uploaded (for Address and Phone Number changes only)  
 You must mail the Application Administrator Authorization Form, signed by a Signing Officer to Quality Assurance in order to process your application. Original Signatures must be provided

AUTHORIZATION FORM	UPLOADED ON
AUTHORIZATION_FORM.pdf	02-Jul-2010 10:11:55

If you are changing the Application Administrator’s Name, a New Authorization Form must be submitted; the form must be signed by one of your Registered Signing Officers and mailed to us.

A new User ID for the Application Administrator is issued once the request has been completed.

4. If you would like to make the Application Administrator a Board Member, check the “Application Administrator is also a Board Member” box.
5. Provide the Application Administrator’s position title, Address & Phone Number.
6. If the Application Administrator is also a Signing Officer, select this box and provide us with a signature form.

There are 2 ways of doing this:

**Option One (if you have a scanner):**

1. Download the signature form
2. Signing Officer completes the form
3. Scan the form and save it to your computer
4. Select the “Attach Copy of the Completed Signature Form”
5. Click on the “Browse” button to look for the scanned file on your computer
6. Click on “OK” once you have found it
7. Click on the “Attach” button to have this file attached to this request.

Remember that an original ink signature is required on the form. We do not accept typed or electronic signatures.

**Option Two (no scanner):**

1. Select the “Mail the Form to Quality Assurance” option
2. Don’t forget to mail us the completed form with an original signature or your request will not be completed.
3. Complete the form
4. Select correct option for the Signature Form
5. Click on the “Add Board Member / Signing Officer” button at the bottom of the screen.

Click on “Save and Continue” once you have completed all the changes.  
Don’t forget to click the “Submit for Review” button once you have made all the changes.

**REVIEWING SUBMITTED REQUESTS**

You can review requests that you have submitted. All requests submitted within the last 30 days are displayed here.

To view submitted requests:

1. Click on the “My Submitted Requests” tab
2. Click on the Request ID to review the details of a request. This will bring you to the Request Details Page.

You can make changes to a request, if the request is still “Pending Review”

To do this:

1. Click on the “Edit Request” button at the bottom of the page
2. Complete the changes
3. Click on the “Submit for Review” button.

To cancel this request, click on the “Cancel Request” button at the bottom of the page. This will cancel the current request and allow you to re-submit a new one.

You can also view the details of any requests that have been completed in the past 30 days.

Comments may be available from your consultant are displayed here.

### REVIEWING AND UPDATING GENERAL SERVICES

From the General Services screen you can select the languages spoken by your staff, select any language immersion programs you offer select any Dietary Services offered, list the schools that you escort to and review any other General Service information listed in the Registry.

If you do not see a language or dietary service that you offer, contact your Visit Consultant and request to have it included.

To access General Services click on the **General Services Tab**

The screenshot displays the 'General Services' interface for user 'FERNCLIFF ( ID: 1046 )'. It features a navigation bar with 'Home', 'Budget', and 'Registry' tabs, and a sub-menu with 'Agency' and 'Group Centre'. The main content area is divided into three sections:

- 1. Languages Spoken by the Staff: (other than English)**: A grid of checkboxes for various languages. Selected languages include Edo, Greek, Ukrainian, Spanish, and Swahili.
- 2. Language Immersion Program(s):**: A row of checkboxes for Cantonese Immersion, Chinese (Other) Immersion, French Immersion, and Mandarin Immersion. None are currently selected.
- 3. Dietary Services:**: A row of checkboxes for CATERED Food, Kosher Centre, and Special Meals Available upon request. 'Special Meals Available upon request' is selected.

At the bottom of the form are 'Submit' and 'Cancel' buttons.

To remove a language or Dietary Service that is currently selected “Uncheck” the box next to the option you wish to remove. It will be removed from your Registry once you submit the changes to this page.

To add a School Escort Service:

1. Select the type of service
2. Select the school type. You will see a list of schools that match the school type you have selected.

3. Select the school's name from the list
4. Click on the "Add" button. The School Escort Service will be added to the table.

To delete a School Escort Service:

1. Check the box next to the service you wish to delete
2. Click on the "Delete Selected" button

When you have completed your changes, click on the "Submit" button to confirm the changes.

These changes will be reflected on your Registry and also in the Centre's Profile page in our online Child Care Finder.

If you have more than one location, you can view the General Services for the other locations by selecting them from the drop-down list at the top of the page and clicking the "GO" button.

### **REVIEWING SERVICE OFFERINGS**

Using the Service Offering Screen you can view the Service Offerings that have been created for your centre.

To view Service Offerings:

1. Click on the Registry Tab
2. Next Select Group Centre Tab
3. Select the Location you wish to view and then click on GO

Now you will see a list of service offering for the location you selected.

To view a Service Offering Schedule Details

1. Click the "Details" link on the Schedule column.

This will open the Service Offering Schedule Details Screen. Here you will see the days and periods for which the service offering is scheduled.

2. Click "OK" to return to the previous screen.

Contact your Budget Consultant or Budget Coordinator if you need to update or make changes to any of the Service Offerings displayed.

If you have more than one location, you can view the Service Offerings for the other locations by selecting them from the drop-down list at the top of the page and clicking the "GO" button.