

UPDATING BOARD MEMBERS, OPERATORS AND SIGNING OFFICERS ON ONLINE SERVICES

Purpose: Enables agencies to meet Children's Services requirements regarding updating board members, operators and signing officers on online services.

Primary user role: Budget Submitter

Secondary user role: Application Administrator

This feature replaces the collection of manual signatures on page 2 of the Children's Services annual Budget forms. It also replaces the need for manual signature collection on the Wage Grant Form submissions. The feature allows agencies to update their information as changes occur, rather than once a year. The new system came into effect in July 2010 and a revised signature form that meets our legal requirements was introduced.

All agencies with an Online Services account must update all of the Board / Operator / Signing Officer information in Online Services to reflect the current Officers of the Corporation / Designates. A revised signature form is required to be submitted for all signing officers, even pre-existing ones. An agency signing officer, designated as a "Budget Submitter", will need to login to Online Services to complete these updates.

- At initial login some Officer Update screens may show current board members/operators and signing officers. These entries were pre-populated by Children's Services to allow operators access to their existing account. These pre-existing entries require an update which includes an updated signature form attached to each corresponding signing officer entry. For these pre-existing entries, the edit feature may be used to confirm or submit required changes online. A copy of the revised signature form will need to be scanned, attached and submitted through Online Services, or mailed to Children's Services where it will be attached to the corresponding entry submitted to us.
- All signing officers of an agency must be entered into the system and must have a corresponding signing officer form submitted. This includes signing officers designated by the Board / Operator i.e. Supervisor, CFO, Executive Director
- All Board Members or Operators of an agency must be entered in the system as well as a description of their role i.e. Director, Board Member, Treasurer, President, Owner or Proprietor.

The web addresses listed below will direct you to tools that describe the process:

Written instructions:

www.toronto.ca/children/csis/guide_updates.pdf

Online tutorial:

www.toronto.ca/children/operators/csis_training/eLearning_july_10.html

Best practices / recommendations for this feature

It is recommended that all agencies assign more than one signing officer to the "Budget Submitter" role within the Online Services system.

It is recommended that the "Budget Submitter" keep an up to date printed copy of the "Current Board Members and Signing Officer" screen identifying the current board composition and roles. This copy should be available to all members of the corporation and to senior staff where relevant i.e. Director, Supervisor, CFO.

It is recommended that the agency "Application Administrator" keeps an up to date printed copy of the "Role Assignments – Agency" report from the Online Services system. This copy should be available to all members of the corporation and to senior staff where relevant.

See sample (A)

It is recommended that for all agencies, and **strongly recommended** for Non-profit agencies, that more than one person is assigned key roles within Online Services. For Non-profit agencies this is particularly important for the "Budget Submitter" role. It will allow you to manage day to day business efficiently, and to submit information to Children's Services online within the timelines of the business cycle.

It is recommended that agencies develop written procedures for assigning and managing roles in the Online Services system. This would include a procedure for current board members or exiting board members assigned as "Budget Submitters" to transfer roles to new board members and signing officers as part of their exit from the agency.


Two very important roles must be kept current in order to ensure your agency can always access the features in Online Services.

The Application Administrator (AA) must be kept current as this person is able to create roles in the system. The AA assigns the Budget Submitter from a pick list of signing officers in the system.


The Budget Submitter is the only person who can update other signing officers in the system to ensure that there is always a current pick list of active signing officers in the system.

When one or both of these roles are terminated before a new person is assigned, you can be "locked" out of your system.

Sample A



Role Assignments - Agency



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| Alternative Primary School Parents Group (1006) | Application Administrator | Attendance Recorder For Hc | Attendance Submitter For Hc | Budget Preparer | Budget Submitter | User Administrator |
|---|---------------------------|----------------------------|-----------------------------|-----------------|------------------|--------------------|
| Warning, Required Role Not Assigned | | NO | NO | | | |
| John, John (39884046) | | | | | | Y |
| Pain, Ful (69966422) | | | | Y | | Y |
| Test, Rod (15781600) | | | | Y | | |
| Testing, Rod_silva (80000004) | Y | | | | | |
| Testing, Testing (83789135) | | | | | Y | |
| Vender, Ryan (94205746) | | | | | | Y |

The Application Administrator (AA) must be a signing officer of the agency or authorized delegate. Only one AA is permitted. You must always have a current AA assigned.

A Budget Submitter must be a signing officer of the organization. This role can be assigned to multiple signing officers. Persons assigned in this role are able to submit grant forms, change the Application Administrator and update Board / Operator / Signing Officers online. You must always have a current person assigned through Online Services in the Budget Submitter role.

For Online Services technical help please contact the helpdesk at 416 397-5555

For assistance with Online Services roles and processes please contact Nicole Warner at warner@toronto.ca .