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Instructions for Submitting an Application for the Registration of a Pension Plan Amendment on the Pension Services Portal (PSP)

A Few Things to Note

Note: Due to the sensitive nature of the information available on the PSP, you should not share your PSP account details with other individuals within your own organization, or with third party service providers.

As stated in the PSP Access Agreement:

- Only Pension Plan Administrators (as defined under section 8 of the Pension Benefits Act (PBA), should log into the PSP using the Primary Administrator account.
- While the Pension Plan Administrator may delegate some or all of the responsibilities for administering the pension plan, and administering and investing the pension fund to various third party providers, the third party provider is not the Pension Plan Administrator.
- The PSP should only be accessed by individuals with valid PSP accounts.

If FSCO believes your PSP account has been incorrectly activated or shared, or used to gain unauthorized access to the PSP, you will be notified that your account has been suspended. For security purposes, any improper delegations or other account activity that occurred while the account was compromised may be cancelled by FSCO. Keep in mind that account suspensions and cancelled delegations are not considered acceptable reasons for granting an extension of a filing deadline. As a result, late fees or other penalties may be incurred.

Instructional Video

FSCO's [Video on Submitting an Application for the Registration of a Pension Plan Amendment](#) provides the same information as the instructions outlined below.

How to Submit an Application for the Registration of a Pension Plan Amendment

To submit an online application for the registration of a pension plan amendment, log into the PSP and follow the steps below:

1. In the top navigation bar, select "Applications".
2. You should now see the Application Record page.
 - To begin a new amendment online, click on the "New Application" button and go to [step 3 of these instructions](#).
 - If you previously started and saved the amendment online, please follow the steps below:
 - Enter the plan number and select "Amendment" from the "Application" drop down menu.
 - Then click on "Open Workspace" in the "Actions" column for this application.
 - Skip step 3 below and go to [step 4 of these instructions](#).

3. On the Application Profile page, select the plan number from the drop down menu and select "Amendment" from the "Application Type" drop down menu. Then complete the questions and click on the "Start" button.
4. You should now see the Application Workspace page. Click on "Add Amendment Detail" in the "Actions" window.
5. You should now see the online Application for Registration of a Pension Plan Amendment. Indicate the Effective Date of the Change and the Type of Change and the PSP will ask you to provide information about the changes being implemented through the amendment. After you answer all of the questions, you will be returned to the Application Workspace page.

Please note the following:

- You must repeat the "Add Amendment Detail" function for each additional change that is included in the amendment. This includes changes that are occurring on different effective dates, as well as multiple changes that are occurring on the same effective date. For example, an amendment with the following changes, would require that the "Add Amendment Detail" function be run three times:
 - Change in employee contributions on January 1, 2012
 - Change in employee contributions on January 1, 2013
 - Change in eligibility for membership on January 1, 2013
 - When you have finished adding the amendment details, the information you provide will be used to populate the Form 1.1. This form can be viewed and printed by clicking on "View Form 1.1 (PDF)" in the "Actions" box on the Application Workspace page.
6. On the Application Workspace page, the documents that must be submitted with the application will show in the "Application Status" box. Click on "Attach Document" in the "Actions" window on this page to upload the documents.
 7. On the Attach Document page, click on "Document Type" and select the document you wish to submit. Click on "Browse" and choose the PDF file you wish to attach. Then click on the "Save & Close" button to complete the upload process.

Note that you must repeat the "Attach Document" process for each document that needs to be submitted with your amendment.

8. You should now see the Application Workspace page. To submit the application, click on "Submit" in the "Actions" window.
9. On the Submit Application page, click on the applicable checkboxes for the Canadian jurisdictions, where the pension legislation of that jurisdiction applies to one or more members, former, members or other beneficiaries of the pension plan. Then click on the certification checkbox and click on the "Certify and Submit" button.
10. On the Application Workspace page, the "Status" line will indicate the name of the user, confirm the date that the application was submitted and show the status of the application. The statuses are as follows:
 - Under review – All applications will be automatically forwarded to FSCO staff for review. You should receive an automated email that confirms your application was received by FSCO. If additional information is required, you will be contacted by a FSCO staff member. Otherwise, you will be notified by email when FSCO's review is complete.
 - Registered – After your application is reviewed, if the pension plan amendment is registered, you will receive an email notification from FSCO. Click on the file name for the Certificate of Registration in the "Correspondence" box to view and print the Notice of Registration of Amendment.

- Denied – After your application is reviewed, if the pension plan amendment is not registered, a letter will be sent to you by regular mail.

How to View/Print a Notice of Registration of Amendment

To view and/or print a Notice of Registration of Amendment, follow the steps below:

1. In the top navigation bar, select "Applications".
2. You should now see the Application Record page. Please enter the plan number, select "Amendment" from the Application drop down menu, and select "Registered" from the "Status" drop down menu.
3. Click on "Open Workspace" in the "Actions" column for this application.
4. You should now see the Application Workspace page. Click on the file name for the Certificate of Registration in the "Correspondence" box. Then click on the printer icon to print the letter.