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PRINT

FSRA is actively reviewing all FSCO regulatory direction, including but not limited to forms, guidelines and FAQs.

Until FSRA issues new regulatory direction, all existing regulatory direction remains in force.

## Electronic Filing - Mandatory from January 1, 2013

Effective January 1, 2013, all pension plan filings that have a due date on or after January 1, 2013 must be submitted electronically through the Pension Services Portal (PSP). To file online, the Pension Plan Administrator is required to activate his/her PSP account.

Pension Plan Administrators who have filings with a statutory due date up to December 31, 2012, and who received a filing extension beyond January 1, 2013 (under section 105 of the Pension Benefits Act or by regulation), may continue to file in paper format.

### About the PSP

The PSP enables Pension Plan Administrators and their delegates the option to electronically file all prescribed filings:

- Annual Information Return (AIR)
- Investment Information Summary (IIS)
- Pension Benefits Guarantee Fund Assessment Certificate (PBGF)
- Actuarial Valuation Report/Actuarial Information Summary (AIS)
- Pension Plan/Fund Financial Statements (FS)
- Statement of Investment Policies and Procedures (SIPP) and SIPP Information Summary (Form 14)

There are several benefits of submitting the prescribed filings electronically. The PSP:

- allows Pension Plan Administrators and their delegates to submit and verify the status of electronic filings online;
- ensures that data and personal information is kept secure and protected;
- performs a preliminary verification of any data that is submitted to FSCO;

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- provides alerts and warnings if it detects any errors in submissions; and
- supports FSCO's commitment to provide environmentally friendly and cost effective services.

The PSP may also be used for requesting extensions for filing deadlines and requesting approval for re-filing prescribed filings that were previously submitted through the PSP. For step-by-step instructions on all of these activities, refer to the [PSP Instructions](#).

## Filings that are Due Before January 1, 2013

If your pension plan's filings are due on or before December 31, 2012 and the criteria below are satisfied, you may use the PSP to file electronically, or you may file in paper format:

- AIR and/or PBGF – Period start date is on or after January 1, 2009.
- FS – Period start date is on or after January 1, 2010.
- AVR and AIS – Valuation date is on or after January 1, 2010.

As per section 16.1(1) of the Regulations, an AVR filed under section 3, 4, 13, or 14 must be accompanied by an AIS. Therefore, if you file the AVR electronically, you must also file the AIS electronically.

If your plan's filings are due on or before December 31, 2012 and the above criteria are not satisfied, then they must be filed in paper format.

If your IIS filing is due on or before December 31, 2012, you must use the PSP to file electronically.

## How to Access the PSP

To use the PSP, a Pension Plan Administrator must first activate his/her personal PSP account. Once a Pension Plan Administrator's account is activated, he/she has the option to delegate PSP access to other individuals.

For step-by-step instructions on activating a PSP account, logging into the PSP, or delegating access to the PSP, refer to the following resources:

- [PSP videos](#)
- [PSP Instructions](#)

## How to Learn About PSP Updates

Once a PSP account has been activated, FSCO will notify the Pension Plan Administrator of any PSP updates by e-mail.

Pension Plan Administrators and their delegates should also check the PSP regularly for new developments.

## Learn More

For more information, refer to the following resources:

- [Filing Information for Pension Plan Administrators](#)
- [FAQs on e-filing through the Pension Services Portal](#)
- [PSP videos](#)
- [PSP Instructions](#)

## Contact FSCO

To send us an inquiry or comment about the PSP, email [PensionInquiries@fSCO.gov.on.ca](mailto:PensionInquiries@fSCO.gov.on.ca) or call (416) 590-7177.