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# Instructions on the Pension Services Portal (PSP) Delegation/Revocation Process

## Responsibilities and restrictions

Delegation is required if individuals other than the Pension Plan Administrator need to have access to the PSP to perform work on the pension plan. Delegating or revoking access to the PSP can be performed by the Pension Plan Administrator.

Delegated Administrators may also delegate or revoke access to the PSP to perform work on the pension plan but they are limited to PSP users within their organization.

While the Pension Plan Administrator and/or Delegated Administrator may delegate PSP access to other individuals, the Pension Plan Administrator is ultimately responsible for:

- ensuring the delegated functions are performed accurately and in a timely manner; and
- making sure that all delegates perform their roles/tasks with an appropriate standard of care, in compliance with requirements of the Pension Benefits Act, Regulation 909 and any applicable [FSRA Pension Policies](#).

[Video Descriptive Transcript: “How a Primary Administrator can delegate or revoke access to FSRA’s Pension Services Portal \(PSP\)”](#)

## A Few Things to Note

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

Consistent with the PSP Access Agreement:





- Only Pension Plan Administrators (within the meaning of section 8 of the Pension Benefits Act (PBA), may 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 may only be accessed by individuals with valid PSP accounts.

If FSRA 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 FSRA. 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.

## How to delegate PSP access

Delegating access to a pension plan can only be performed by the Primary Administrator role. Delegated Administrators may also delegate access to a pension plan but their delegations are limited to PSP users within their organization.

1. Log into the PSP. (If you need assistance with this process, please refer to the [Instructions for Logging into the PSP.](#))
2. In the top navigation bar click on "Plan Profile".
3. On the Plan Profile page, select the appropriate plan number from the drop down menu in the top left-hand corner of your screen.

Note: If you are only responsible for one plan, your plan number will already be selected. If you are responsible for more than one plan, you will have several plan numbers to choose from.

4. After you select a plan, a list of all current delegations and new delegation requests for the plan will be shown on the Plan Profile page. You will notice that you are listed as either the Primary Administrator or Delegated Administrator.

To grant PSP access to an individual, click on "New Delegation" in the "Actions" box on the right-hand side of your screen.

5. On the "New Delegation" page, complete at least one of the four fields (First Name, Last Name, Email or Organization) and click on "Search". If the individual already has an





activated PSP account, their name will appear in the search results. If it is the correct individual with the correct organization, click on “Delegate” in the “Actions” column.

**If the individual does not have a PSP account please proceed to Step 9.**

6. From the drop down menu select one of the four following roles:
  - a. Actuary: This individual must be a Fellow of the Canadian Institute of Actuaries (FCIA). Either they can work for your organization, or they have been hired by your organization to act as its actuary. If you select this option, the individual will have access to all PSP functions, except delegation. In addition, they will be able to provide actuarial certification for specific plan filings.
  - b. Agent: This individual may work for your organization or they have been hired by your organization as third party provider. If you select this option, the individual will have access to all PSP functions, except the delegation function.
  - c. Delegated Administrator: This individual may work for your organization or for a third party provider organization. If you choose this option, you will grant the individual access to all PSP functions, including the delegation function within the delegated administrator’s organization.
  - d. Secondary Administrator: This individual is employed by your organization. (Since you are the Primary Administrator, that means you both work for the same organization) If you choose this option, will grant the individual access to all PSP functions, except for the delegation function
7. Once you have selected a role, check the authorization box (when you select the Actuary role you must also check FCIA authorization box) and click on the “Save and Close” button.

Note: If an individual needs to be delegated access to several plans, you will need to repeat the above process for each plan.

8. Both you and the delegated individual will receive an email that confirms the initiation of the delegation process.

**Steps if Individual does not have PSP Account**

9. If an individual’s name does not appear after searching on the “New Delegation” page, please confirm that you have correctly entered their information. Once you have, it is likely the individual does not have a PSP account. Please click on “Cannot Find User” to create a new user.
10. Enter the required information on the “New Delegation” page and click on “Save & Close”. For further information regarding the delegated roles, please refer to Step 6.  
Note: If the organization is not listed in the drop down selection, click on “Cannot find organization” and enter the legal name of the Organization the individual works for.





this has been submitted, FSRA will review the request and you will be notified when the review is complete.

11. You will receive an email that confirms your request and the delegated individual will receive a separate email.
12. After the new delegate activates their account, logs into the PSP and accepts the delegation, you will both receive an automated email that confirms the delegation. This means the delegation process has been successfully completed, and the delegate can now access the PSP to perform various tasks, such as electronic filing.

Note: New PSP users have 7 days to activate their accounts. If you wish to activate your account after 7 days you will need to contact [PensionInquiries@fsrao.ca](mailto:PensionInquiries@fsrao.ca)

## How to revoke delegated PSP access

**To revoke a user's delegation on a pension plan as a Primary Administrator or Delegated Administrator, please log into the PSP and follow the below steps:**

1. In the top navigation bar select "Plan Profile" and choose the appropriate plan number from the "Plan Number" drop down menu.
2. After a plan is selected, a list of all current delegations for that plan will display under the Delegations table. To revoke an individual's PSP delegation, click on "Remove" under the "Actions" column next to their name.
3. On the "Delegation" page, review if the correct individual is being revoked, then click "Remove". If you have selected the wrong person click "Cancel" and you will be brought back to the "Plan Profile" page, where you can repeat step 2.
4. Both you and the individual whose PSP access has been revoked will receive a confirmation email and the "Plan Profile" page will be updated to reflect this change.

**To revoke your access to a pension plan as a non-Primary Administrator, please log into the PSP and follow the below steps:**

1. On the "Home" page, under the "Delegations" table, identify the correct pension plan and role. Click the "Revoke" link under the "Actions" column.
2. On the "Delegation" page, click "Revoke".
3. Both you and the Primary Administrator will receive a confirmation email and your "Delegations" table will be updated to reflect this change.

**Video Descriptive Transcript: "Registration of a pension plan amendment on FSRA's Pension Services Portal (PSP)"**





[**LOGOS:** FSRA. Financial Services Regulatory Authority of Ontario and the Coat of Arms of Ontario.]

[An icon of a piggy bank is surrounded by other financial icons such as a stack of coins, a calculator, a money bag, an hourglass, an elderly couple, a person with an umbrella, a laptop and credit card, and a calendar and clock.]

[**TEXT ON SCREEN:** Instructional Video by Pensions.]

[**TEXT ON SCREEN:** Delegating and Revoking Access on the PSP.]

[**NARRATOR:**]

Delegation is required if individuals other than the Pension Plan Administrator need to have access to the PSP to perform work. Delegating or revoking access to the PSP can be performed by the Pension Plan Administrator or Delegated Administrator.

[**NARRATOR:**]

There are 5 different PSP account roles. All allow for full access to PSP functions such as electronic filing. Please pause the video to read the details or you can view a description of each role on our website.

[The 5 PSP account roles are listed in a graphic along with their individual features.

One. Primary Administrator. Full access to all PSP functions. Full delegation access.

Two. Secondary Administrator. Internal to Primary Administrators' organization. Access to all PSP functions. Cannot delegate.

Three. Delegated Administrator. Internal or External to Primary Administrators' organization. Access to all PSP functions. Can delegate users the same organization.

Four. Actuary. Fellow of the Canadian Institute of Actuaries. Internal or External to Primary Administrators' organization. Access to all PSP functions. Cannot delegate users. Can provide actuarial certification for filings.





Five. Agent. Internal or External to Primary Administrators' organization. Access to all PSP functions. Cannot delegate.]

[The Pension Services Portal is displayed on a screen. A cursor moves around the screen demonstrating each step.]

**[NARRATOR:]**

Log into the PSP. To delegate access select "Plan Profile" in the top navigation bar. To grant access, click on "New Delegation".

[New Delegation is located in the 'actions' window in the top right corner.]

**[NARRATOR:]**

On this page, complete at least one of the four fields and click on "Search".

[The four fields are: First Name, Last Name, Email and Organization. The user types in a first and last name then hits search. The individual's profile appears along with an 'actions' column.]

**[NARRATOR:]**

Click on "Delegate" in the "Actions" column and select which delegated role you would like to assign.

[Four roles appear in a drop-down list. Actuary, Agent, Delegated Administrator and Secondary Administrator.]

**[NARRATOR:]**

Both you and the delegated user will receive emails that confirm the delegation.

**[NARRATOR:]**

If an individual's name does not appear after searching, please click on "Cannot Find User".

['Cannot Find User' is located at the bottom left of the screen.]

**[NARRATOR:]**

Enter the required information and click on "Save & Close".





[The required information is identified with a red asterisk. Role, Organization, First Name, Last Name, Email, and Phone Number.]

**[NARRATOR:]**

Please note after the new delegate activates their account and accepts the delegation, you will both receive an email that confirms the delegation.

**[NARRATOR:]**

To revoke an individual's delegation, click on "Remove" on the Plan Profile page.

[The user clicks the 'Remove' link in the 'actions' column which brings the user to the Delegation page.]

**[NARRATOR:]**

On the "Delegation" page click on "Remove".

[The 'Remove' button is located at the bottom left.]

**[NARRATOR:]**

Both you and the individual whose access has been revoked will receive a confirmation email.

**[TEXT ON SCREEN:** Additional Questions? Please contact pension inquiries at FSRAO dot CA.]

**[LOGOS:** FSRA. Financial Services Regulatory Authority of Ontario and the Coat of Arms of Ontario.]

