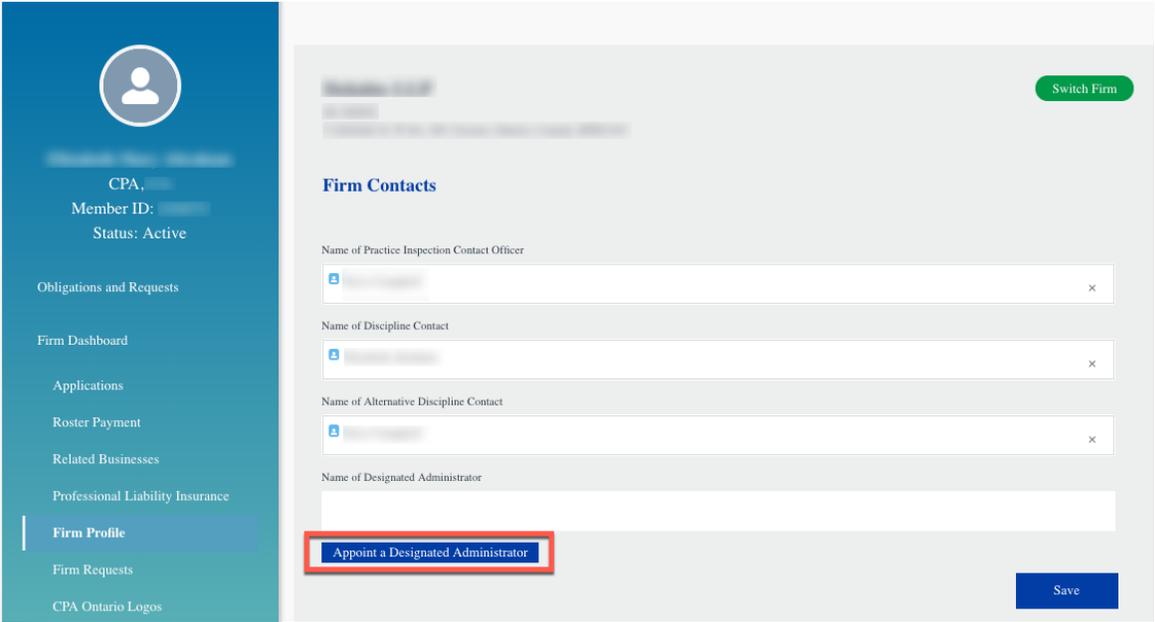


How to Appoint a Designated Administrator

1. Firm representatives can delegate a designated administrator to complete firm obligations and activities on behalf of the firm representative. To appoint a designated administrator, first log in to [My Portal](#) with your CPA Ontario ID and password (do not use your Firm ID and password).
2. Access the **Firm Dashboard**. Ensure to select the correct firm if more than one is listed. Then select **Firm Profile** and click the **Appoint a Designated Administrator** button.



3. On the **Appoint a Designated Administrator** page, if the designated administrator is a CPA Ontario member, search using their first and last name and be sure to verify their member ID. Also ensure to declare and certify as required then select **Submit**.



Appoint a Designated Administrator

By appointing a designated administrator with the ability to perform all firm related activities, as the Firm Representative, you remain accountable for the accuracy, truthfulness and completeness of all firm related obligations.

Member's Name [Not a member?](#)

Declaration

I declare and certify that:

- I am the Firm Representative;
- I understand and agree that, as Firm Representative, I am accountable for all obligations of the Firm and that designating an administrator for Firm obligations does not alter, limit or absolve any of my accountability;
- I request CPA Ontario grant access to the administrator I have designated to assist in managing the Firm's obligations, and I take responsibility for all acts of the administrator including all attestations and/or declarations to the accuracy, truthfulness and completeness of submitted information made on my behalf.

If your designated administrator is not a member, click **Not a member?** to add the individual. Complete the form on the next page by providing your designated administrator's first name, last name, date of birth, business phone number and preferred email address. Ensure to declare and certify as required then select **Submit**.

Appoint a Designated Administrator

By appointing a designated administrator with the ability to perform all firm related activities, as the Firm Representative, you remain accountable for the accuracy, truthfulness and completeness of all firm related obligations.

*First Name

*Last Name

*Date of Birth

Business Phone

*Preferred Email

*Confirm Email

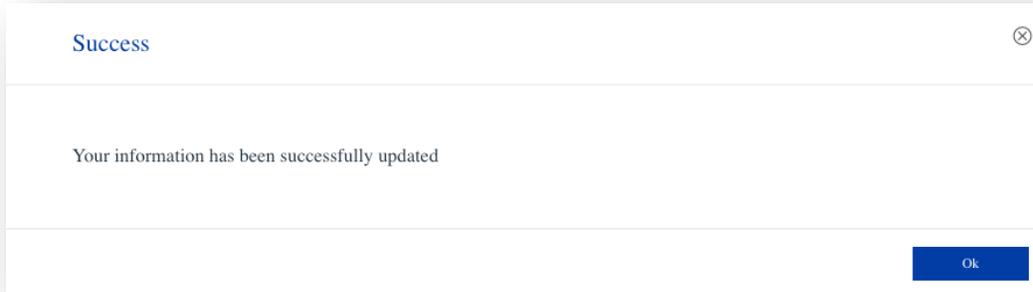
Declaration

I declare and certify that:

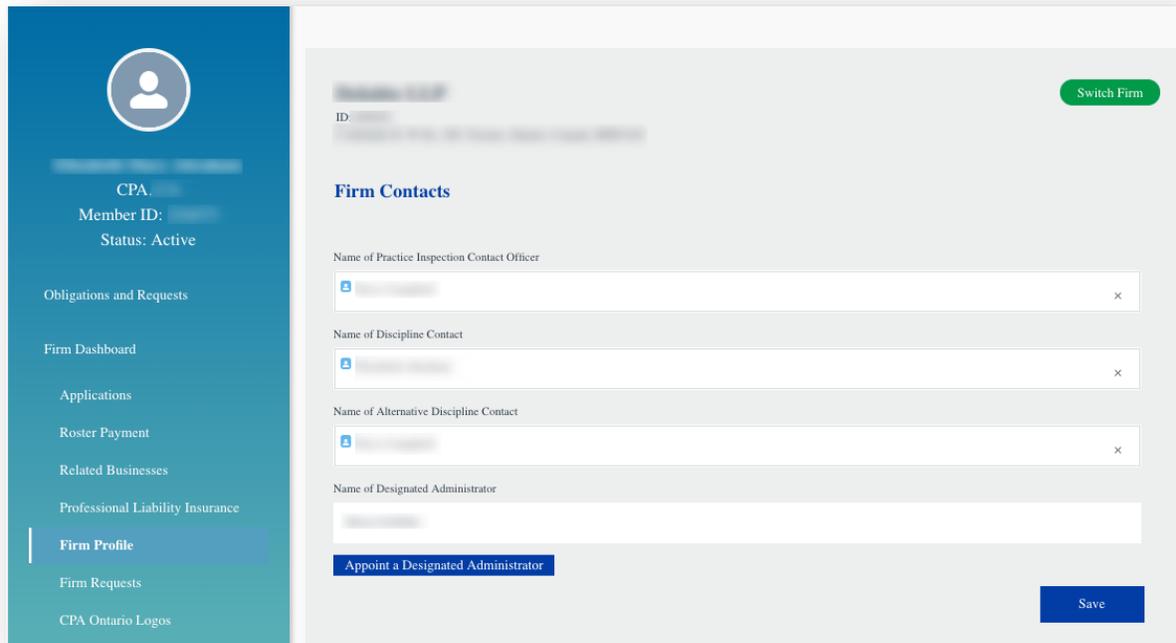
- I am the Firm Representative;
- I understand and agree that, as Firm Representative, I am accountable for all obligations of the Firm and that designating an administrator for Firm obligations does not alter, limit or absolve any of my accountability;
- I request CPA Ontario grant access to the administrator I have designated to assist in managing the Firm's obligations, and I take responsibility for all acts of the administrator including all attestations and/or declarations to the accuracy, truthfulness and completeness of submitted information made on my behalf.



On the next page, you will see a **Success** notification following your submission. Click **Ok** to proceed.



4. The name of the designated administrator for your firm will now appear on the **Firm Dashboard > Firm Profile** page.



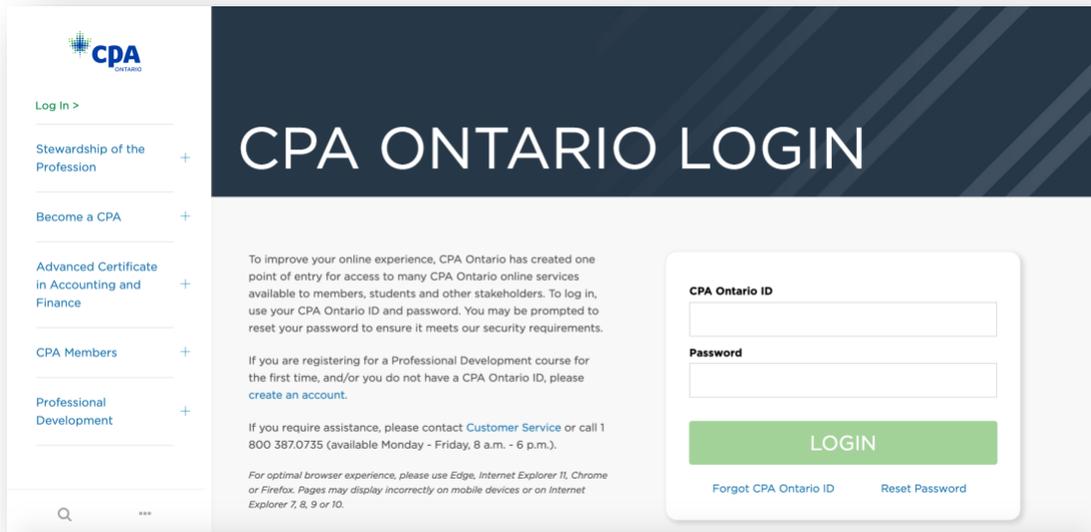
If the designated administrator is a CPA Ontario member, they will have immediate access to the **Firm Dashboard** upon logging in to My Portal.

If the designated administrator is not a CPA Ontario member, they will receive an email with their login details within 2-3 business days.

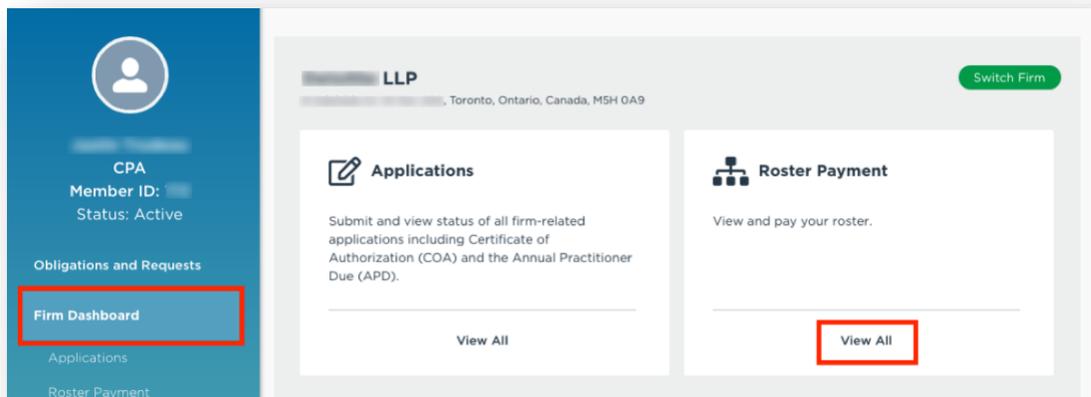


Instructions for Registered Firms to Remit Your Members' AMD on My Portal

1. As the firm representative or designated administrator, you can make AMD payments on behalf of employees of your firm. To do so, first log in to [My Portal](#) with your CPA Ontario ID and password (do not use your Firm ID and password).



2. Access the **Firm Dashboard**. Ensure to select the correct firm if more than one is listed. Then select **Roster Payment** and click **View All**.



3. On the **Roster Payment** page, you will be presented with the list of members eligible for AMD roster payment. If a member is not on the list, you can add them by selecting the **Add Contact** button. Search for members by first and last name, then select the members and click the **Pay** button to proceed to payment. Ensure that you select the correct members for



payment. Also note that if you click **Back** on the Payment screen, your selected members may not be saved.

The screenshot shows the 'Annual Membership Dues' payment screen for a firm named 'LLP' located in Toronto, Ontario, Canada. The page includes a 'Switch Firm' button in the top right. Below the firm information, there is a section titled 'Annual Membership Dues' with instructions: 'Select the contacts you wish to pay for. Only individuals who have completed their AMD/CPD obligations will be eligible for roster payment. To remit payment for CPA Ontario members not found on the list below, select the Add Contact button.' Below this, there is a section 'Select the members you wish to pay for' with an 'Add Contact' button highlighted in a red box. A table lists members with columns for selection, name, CPA Ontario ID, title, employer to pay, obligation status, and balance due. The first member is a 'Financial Analyst' with a balance due of '\$'. The selection checkbox for this member is also highlighted in a red box. Below the table, there are navigation buttons (First, Previous, Next, Last) and a dropdown for the number of records (set to 10). At the bottom, it shows 'Total amount to pay: \$0.00' and a 'Pay' button highlighted in a red box.

<input type="checkbox"/>	NAME	CPA ONTARIO ID	TITLE	EMPLOYER TO PAY	OBLIGATION STATUS	BALANCE DUE
<input type="checkbox"/>		*****	Financial Analyst	Yes	Awaiting Payment	\$

Offline Payments

If payments must be submitted by EFT, bank or wire transfer, take a screenshot of the Roster Page or save the webpage as a pdf (using print/save as pdf in your web browser) to show all members with AMD being paid by your firm.

If you're not able to take and save a screenshot, create an Excel file with the following information:

- First and last names.
- CPA Ontario IDs.
- Payment amount for each member.

Then email the screenshot, pdf and/or Excel file to amd@cpaontario.ca with the subject line "Offline Payment AMD". Payments must be received by June 1 to avoid late dues. Members who submit AMD/CPD after June 30 may face suspension and revocation of membership.

Note:

- **Members must complete the online AMD/CPD obligation and indicate that their employer is paying their AMD on their behalf in order for you, the firm, to remit payment.**



- Members must also complete and submit a CPD declaration personally, as firms may not submit CPD declarations on behalf of their employees.
- Refer to the [FAQ](#) for more information and helpful insights on AMD and CPD.