

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 <u>My Portal</u> 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.

	Research 1117	Switch Firm
CPA, Member ID: Status: Active	Firm Contacts	
	Name of Practice Inspection Contact Officer	
Obligations and Requests		×
Firm Dashboard	Name of Discipline Contact	
	Name of Alternative Discipline Contact	×
		·
Related Businesses	Name of Designated Administrator	^
Firm Profile	Appoint a Designated Administrator	
	appoint a benginteer terminetator	
CPA Ontario Logos		Save

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**.



By appointing a designated administrator with the ability to perform all firm related act you remain accountable for the accuracy, truthfulness and completeness of all firm related	ivities, as the Firm Representative, ted obligations.
Member's Name	Not a member?
8	×
 I am the Firm Representative; I understand and agree that, as Firm Representative, I am accountable for all obligations o ministrator 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 mana take responsibility for all acts of the administrator including all attestations and/or declarat and completeness of submitted information made on my behalf. 	f the Firm and that designating an ad- iging the Firm's obligations, and I tions to the accuracy, truthfulness

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**.

• First Name			
		*Last Name	
*Date of Birth		Business Phone o	
	ii		
* Preferred Email			
* Confirm Email			
Declaration			
Declaration I declare and certify that:			
Declaration I declare and certify that: I declare m the Firm Represer I understand and agree	stative; that, as Firm Representat	ive, I am accountable for all obligations of the F	irm and that designating an ad-
Declaration I declare and certify that: I am the Firm Represer I understand and agree ministrator for Firm ob I request CPA Obtation	stative; that, as Firm Representat digations does not alter, li grant access to the admin	ive, I am accountable for all obligations of the F mit or absolve any of my accountability; statute I have desired to assist in unsaveline II	irm and that designating an ad-



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

Success	\otimes
Your information has been successfully updated	
	Ok

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

	ID	Switch Firm
CPA. Member ID: Status: Active	Firm Contacts	
Obligations and Requests		×
Firm Dashboard	Name of Discipline Contact	
	Name of Alternative Discipling Contact	
		×
Related Businesses	Name of Designated Administrator	
Firm Profile	Appoint a Designated Administrator	
	Appoint a Designated Administrator	
CPA Ontario Logos		Save

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 a 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 <u>My Portal</u> with your CPA Ontario ID and password (do not use your Firm ID and password).

CDA			
Log In >			
Stewardship of the Profession	+	CPA ONTARIO	LOGIN
Become a CPA	+		
Advanced Certificate in Accounting and Finance	+	To improve your online experience, CPA Ontario has created one point of entry for access to many CPA Ontario online services available to members, students and other stakeholders. To log in, use your CPA Ontario ID and password. You may be prompted to reset your password to ensure it meets our security requirements.	CPA Ontario ID
CPA Members	+	If you are registering for a Professional Development course for the first time, and/or you do not have a CPA Ontario ID, please create an account.	Password
Professional Development	+	If you require assistance, please contact Customer Service or call 1 800 387.0735 (available Monday - Friday, 8 a.m 6 p.m.).	LOGIN
0		For optimal browser experience, please use Edge, Internet Explorer II, Chrome or Firefox. Pages may display incorrectly on mobile devices or on Internet Explorer 7, 8, 9 or 10.	Forgot CPA Ontario ID Reset 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**.

	LLP , Toronto, Ontario, Canada, M5H 0A9	Switch Firm
CPA Member ID: Status: Active	Submit and view status of all firm-related	View and pay your roster.
Obligations and Requests	applications including Certificate of Authorization (COA) and the Annual Practitioner Due (APD).	
Firm Dashboard	View All	View All
Roster Payment		

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.

LLP Toronto, Ontario, Ca	nada,		Switch Firm
Annual Membership Dues			
Select the contacts you wish to pay for be eligible for roster payment. To remit the Add Contact button. Select the members you wish to pay for	r. Only individuals who have comp It payment for CPA Ontario membe or	leted their AMD/CPD ers not found on the li	obligations will st below, select Add Contact
NAME CPA ONTARIO ID	TITLE EMPLOYER TO PAY	OBLIGATION STATUS	BALANCE DUE
	Financial Analyst Yes	Awaiting Payment	\$
Page 1 of 1 (Total: 1 Selected: 0)			*# of records 10
	Total amount to pay: \$0.00		

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 <u>amd@cpaontario.ca</u> 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.