BASR

Bank Act Security Registry (BASR) Customer Portal User Guide

V 2.0

June 25, 2025

BASR

Disclaimer

Materials in this document are for demonstration purposes only. The characters and events depicted are fictional. Any similarity to real events or persons (whether living or deceased) is unintentional.

Transaction forms can change from time to time. Although we do everything we can to ensure transactions are processed in a timely way, use of outdated forms may result in delays or incomplete transactions. Using the most up-to-date form will help ensure your transactions are processed without delay.

Visit the Bank Act Security Registry website to access the most recent versions of the forms. Bank Act Security Registry does not accept responsibility for any losses resulting from the use of outdated forms.

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Revision History

Version	Revision Date	Summary of Changes	Pages Changed
1.0	June 2024	Creation	All
1.1	June 18, 2024	Multiple – incorporate formatting changes	All
1.2	June 19, 2024	Screen print inserted	7
1.3	June 27, 2024	Account Creation updates, screenshots, Provincial Indicators in Registration numbers, Clear Cache, formatting changes	All
1.4	July 1, 2024	Screenshot updates	43-52
1.5	July 18, 2024	Step 2 – removed reference to Similar name search; Replaced screenshots	32 and 38
1.5	July 18, 2024	Updated important notes re: Adding Debtor Information	46
1.5	July 18, 2024	NOI Checklist table updated	48
1.5	July 18, 2024	COR Checklist table updated	55
1.5	July 18, 2024	Addition of Appendix A	84 – 88
1.6	July 24, 2024	Step 9 – amend reference from NOI to COR	55
1.6	July 24, 2024	Remove “P.O. boxes are not acceptable”	45 and 46
1.7	September 26, 2024	NOI Checklist table updated	48
1.7	September 26, 2024	COR Checklist table updated	55
1.7	September 26, 2024	“Fees and taxes” amended to “Fees”	84
1.8	October 16, 2024	Addition of note regarding addition of File Reference field – optional field for customer use; not a searchable field.	31, 32, 37, 38
1.8	October 16, 2024	Screen shot replaced at top of page	33, 39
1.8	October 16, 2024	Screen shots for Steps 7 and 8 replaced	36, 42

1.8	October 16, 2024	Steps 8 through 14 updated and screen shots replaced – province of registration collected as single field via province dropdown; debtor names collected separate from debtor address information – Debtor Name and Debtor Address fields are now separate; one address collected for all debtors (must be address listed on NOI).	45 - 47
1.8	October 16, 2024	Screen shot in Step 5 replaced	55
1.8	October 16, 2024	Text added recommending review of COR Form Attachment Checklist	55
1.8	October 16, 2024	Error correction section and screen shots updated - province of registration collected as single field via province dropdown; debtor names collected separate from debtor address information – Debtor Name and Debtor Address fields are now separate; one address collected for all debtors (must be address listed on NOI).	75 – 78
1.8	October 16, 2024	Note added at end of Search Options Available section advising that File Reference field is not a searchable field.	85
1.8	October 16, 2024	New section added to the Search by Debtor table - names set out with both French / English names as one debtor not acceptable – each must be set out as a separate debtor. Additional search examples added.	89
1.9	November 27, 2024	New Annual Renewals section added	80-99
1.9	November 27, 2024	Added instructions and screen shots regarding associating an organization to a bank.	9, 10
1.9	November 27, 2024	Added instructions to select “Can access annual renewals” privilege if user requires it.	24
1.9	November 27, 2024	Added instructions to the Modify a Current User section regarding	27

		changing a user's privileges so they can access annual renewals	
1.9	November 27, 2024	Updated screen shot in Step 4 of the Create a New User section	24
2.0	June 25, 2025	Updated to include locations where File Reference (Reference Number) can be found in search results.	31, 32, 37, 38, 46, 87, 94, 95

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Formatting Note

In this manual, underlining is used to emphasize important points.

Bold type is used to identify key terms the first time they appear in the manual. It is also used for:

- The names of documents. The titles of standardized documents, such as forms, are capitalized as well as bolded.
- Computer applications.
- Specific screens, screen sections, buttons, menus, menu options and fields in those applications.

Italics are used for the titles of acts and regulations.

Blue text is used for cross-references. If you are using a PDF version of this document, you can click on this text to go directly to the page number or section indicated.

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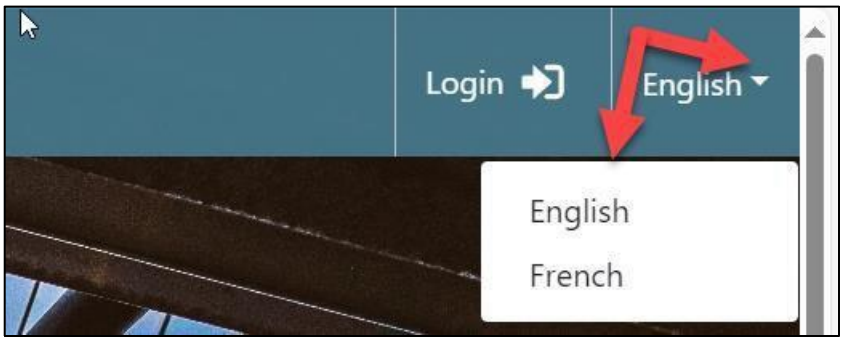
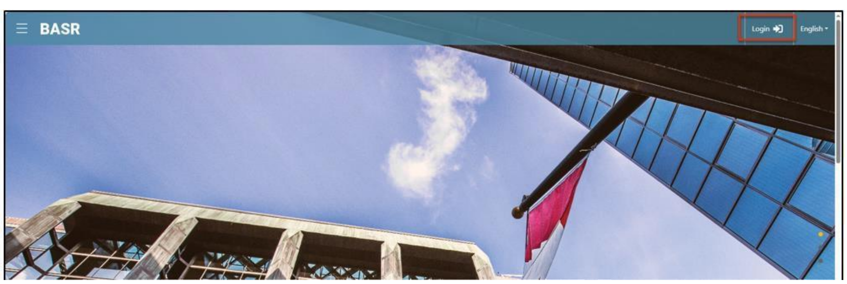
Login to BASR

Using web browsers Chrome or Microsoft Edge, open a new tab or window and go www.basr.ca.

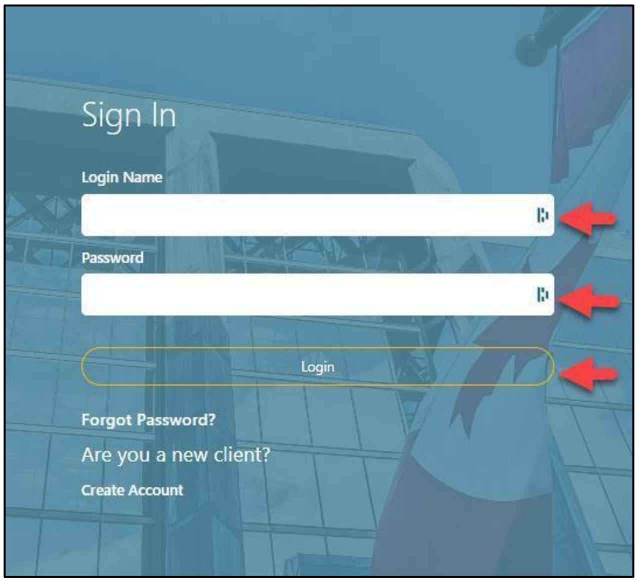
To switch between English and French click on the drop-down arrow in the top right corner of the webpage to select your preferred language.



Select **Login** in the top right corner of the screen:



Enter your **Login Name** (must be an email address) and **Password** and click **Login**.



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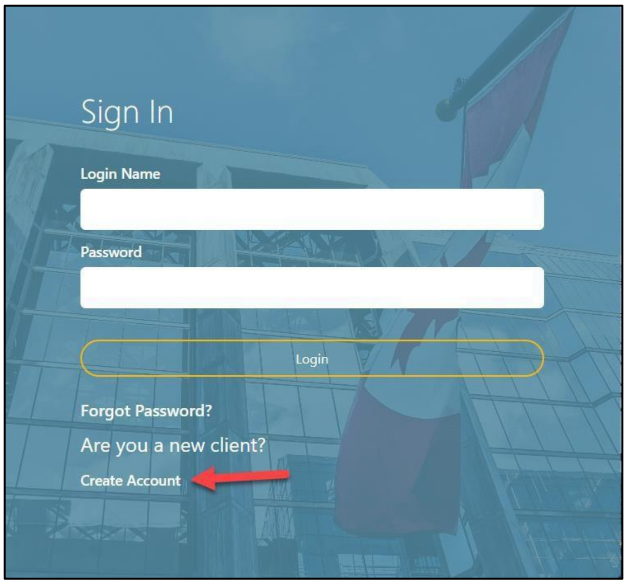
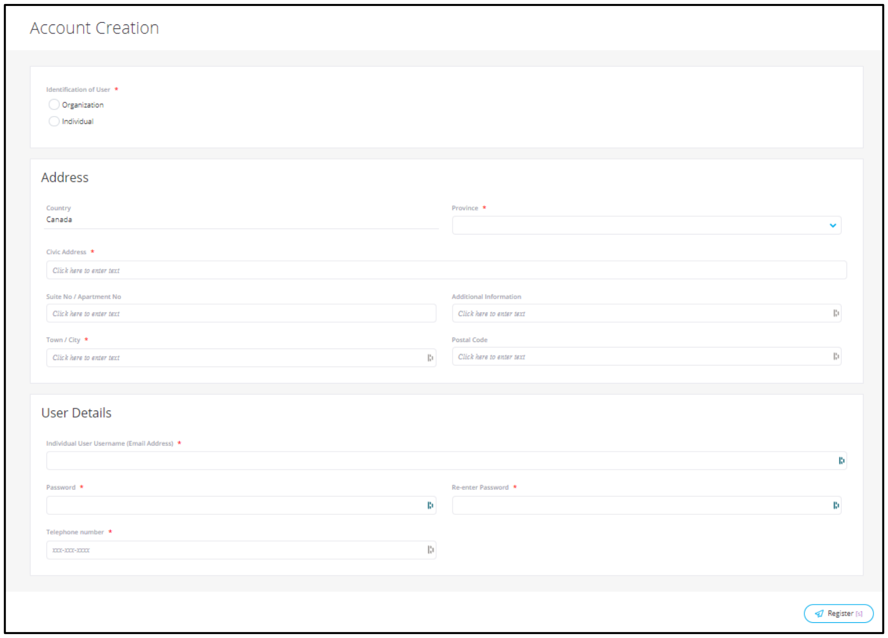
Creating an Account

If you are a new client, select **Create Account.**
Important: An email address/Login Name can only be associated with one account. It may not be linked to multiple accounts.



The **Account Creation** page presents itself in a new window. Each segment of the **Account Creation** page must be completed to ensure a successful submission. Fields with a red asterisk * are required fields.



At the top under **Identification of User*** you will have the option to choose either an **Organization** account or an **Individual** account.

Individual: This account type is for the single user, when only one person will be using this account to complete BASR transactions. One user account is associated with one billing account. This account type can only submit requests for search and requests for copies of documents.

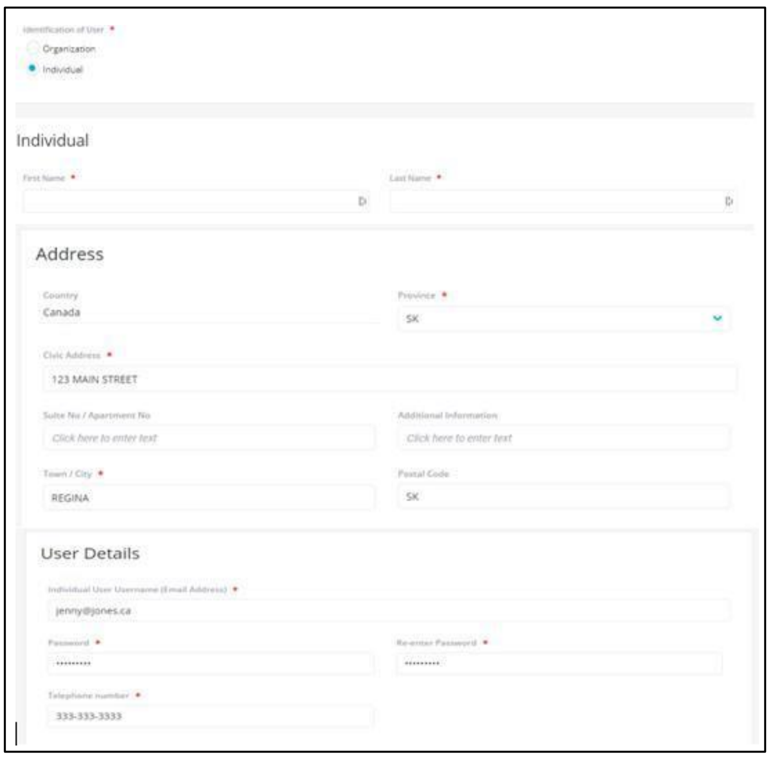
Requests for individual accounts will be automatically fulfilled.

Organization: This account type is used for larger organizations with multiple users associated with one billing account. Each user account will link back to the same organizational account and all aspects of the individual user and billing account can be managed by your own administrator(s). This account type can submit all registrations, searches, and requests for copies of documents.

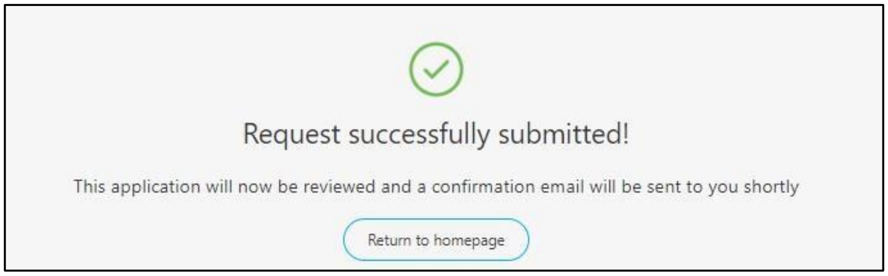
Requests for Organizational accounts are reviewed and approved by the Central Processing Facility with a one business day turnaround.

Depending on what you select for the **Identification of Users**, you will be prompted with one of two options:

Individual
If you select **Individual**, you will be prompted with a new box that asks for First Name and Last Name, Address and User Details. Once completed, click **Register**.



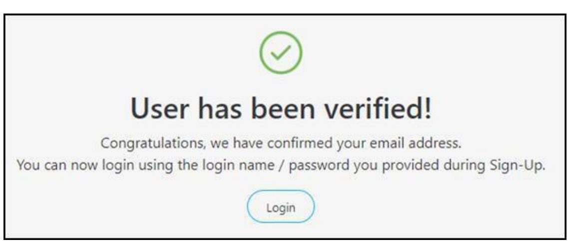
Immediately after you click **Register**, the below screen will appear.



You will receive an email containing a link to verify your account.

After clicking on the link, you will be taken back to the home page with the message **Click the button below to Verify**. Click **Verify**.

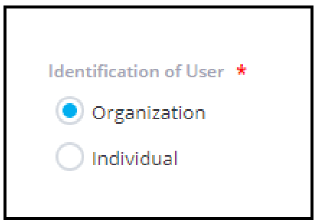
Once you click **Verify**, the **User has been Verified** screen will appear. Click **Login** and you will be taken to the login screen.



OR

Organization
If you select **Organization**, you will be prompted with a new box that asks for your organization's name.

Click on **Organization**.

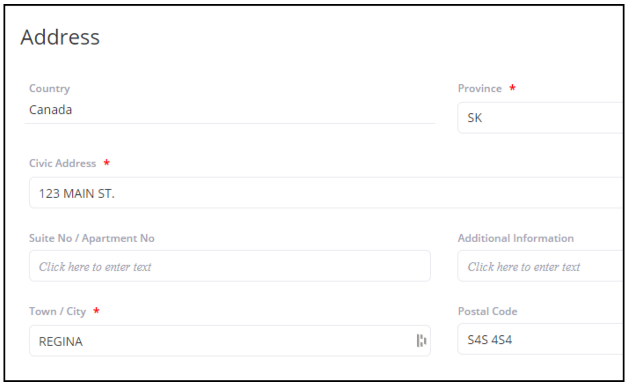


Under **Organization's Name**, enter name of organization.
Note: If your organization requires more than one account number you must include a unique identifier after your organization's name.

E.g., *"Bank of XX – BC" or "Bank of XX – Ontario"*

If you indicate that you are a chartered bank or federal credit union by selecting the **Yes** radio button, the financial institution drop-down menu will display. Select your financial institution.

Under **Address,** enter the mailing address for the organization.

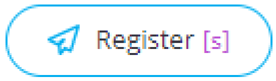


User Details: This is where you will create your new username and password. The following information is required:

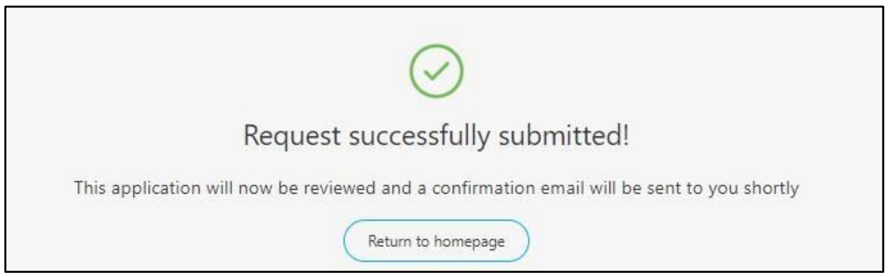
- **Username**: your email address
- **First Name** and **Last Name**
- **Password**: must be 8 to16 characters and contain one upper case (A to Z) and one number (0 to 9)
- **Telephone number**: daytime contact number

Confirmation: select the checkbox to confirm that you agree to the **Terms and Conditions of Use.**

At the bottom of the screen click on the **Register** button.

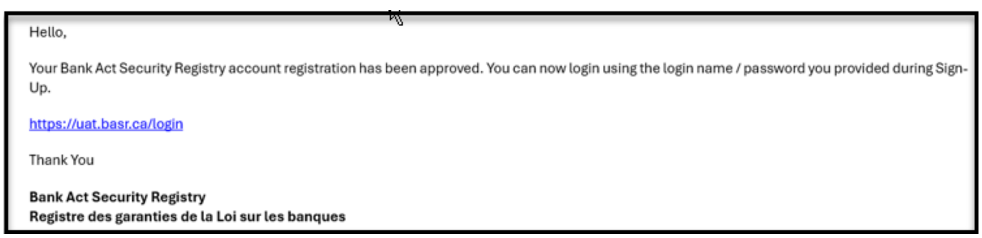


Immediately after you click **Register**, the below screen will appear.



<u>Reminder</u>: Requests for Organizational accounts are reviewed and approved by the Central Processing Facility with a one business day turnaround. Check your email.

Once your Organization's account has been approved, you will receive an email from BASR. Check your junk mail folder if you do not receive the email.



Hello,

Your Bank Act Security Registry account registration has been approved. You can now login using the login name / password you provided during Sign-Up.

https://uat.basr.ca/login

Thank You

Bank Act Security Registry
Registre des garanties de la Loi sur les banques

Click on the link provided in the email. You can now login using the login name/password you provided during Sign Up.

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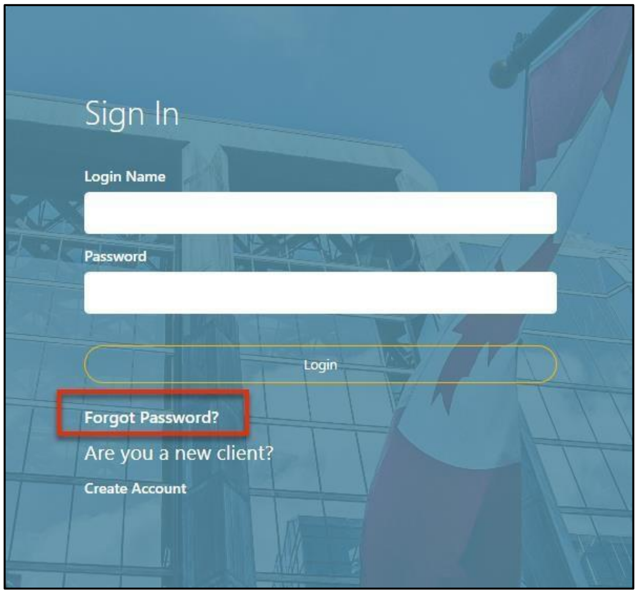
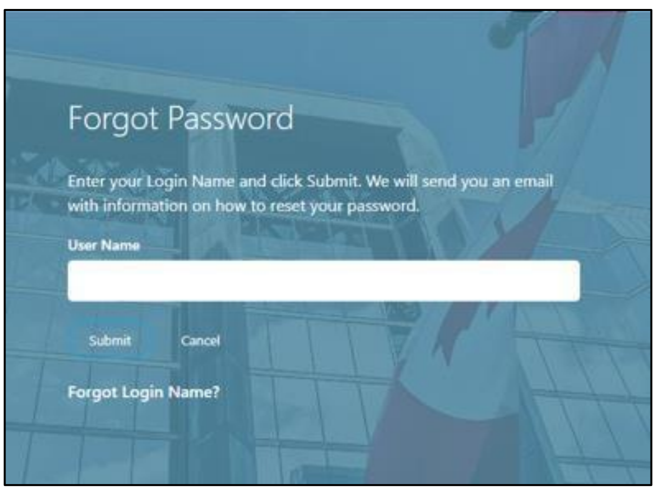
Forgot Password

1. On the **Sign In** screen, click **Forgot password?**

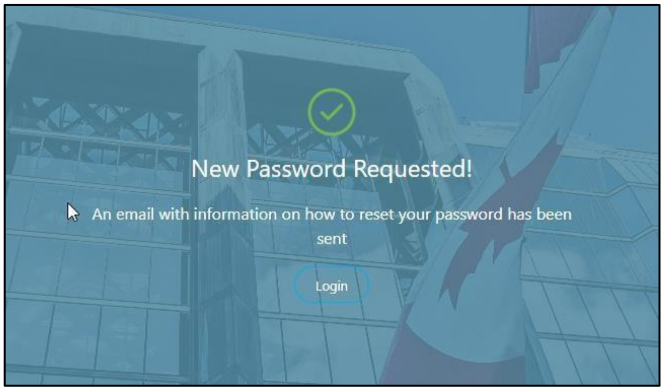


2. The next screen will ask you to enter your **User Name** (your email address).

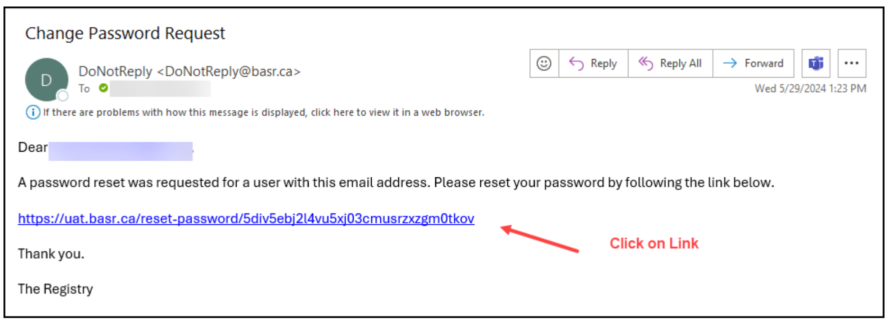


3. Click **Submit**.

4. **New Password Requested** screen will display. Instructions on how to reset your password will be sent to your email. Check the junk folder if the email does not appear.



5. Go to your email, click on the link provided in the email or copy the link into your browser.



6. The link will take you to the **Forgot Password** screen where you must enter your new password twice.

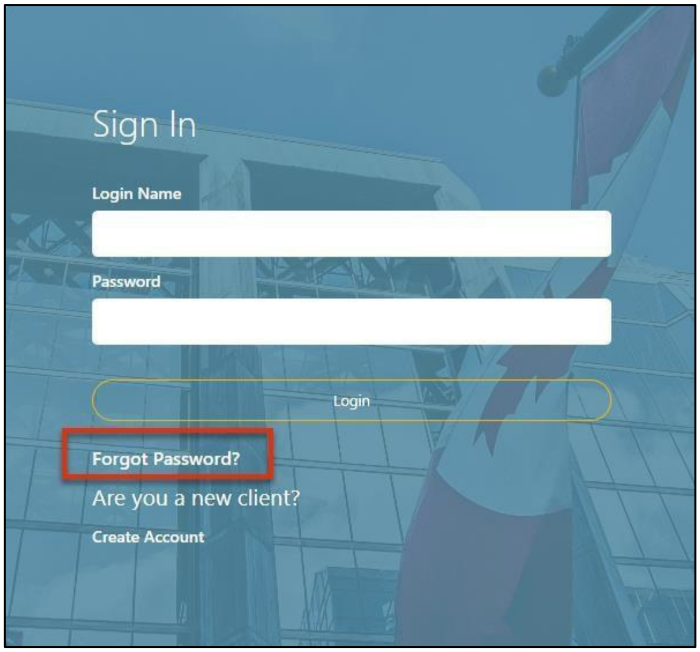
7. Click **Submit**.

8. Confirmation that your password has been updated successfully displays and a **Login** button appears. Click **Login**.

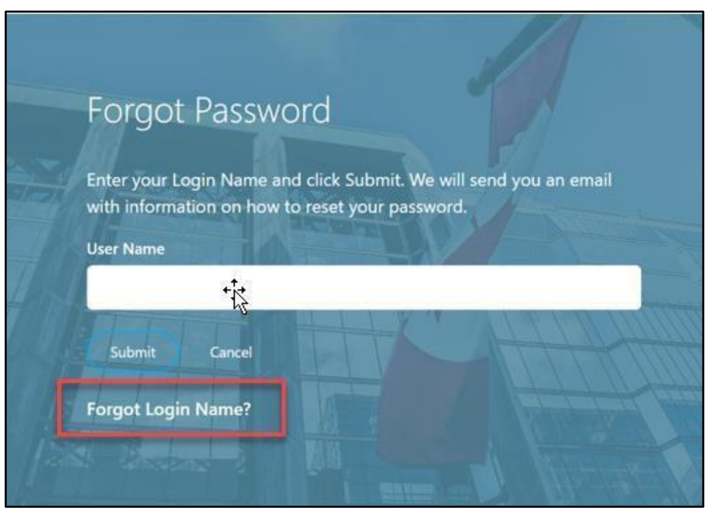
9. A confirmation email is sent to your email address confirming that your password has been updated.

Forgot Login Name

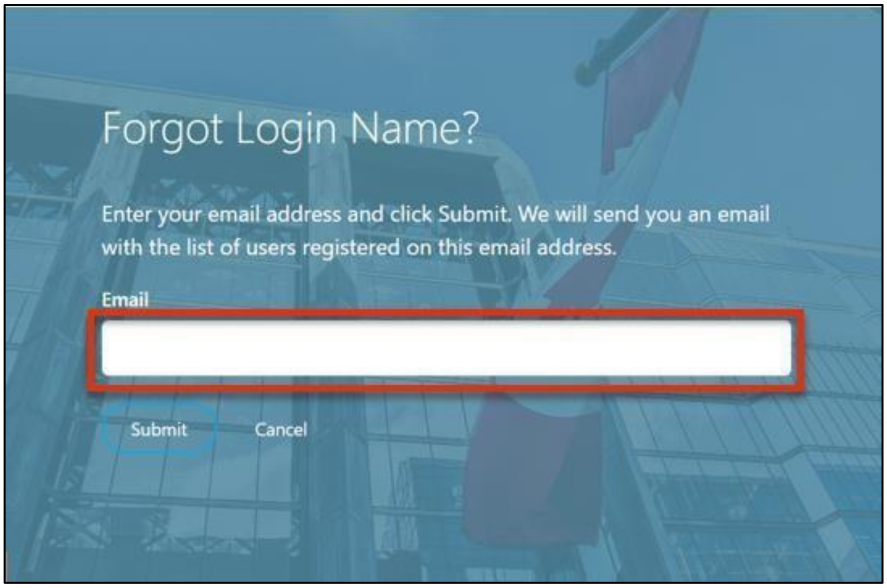
1. On the **Sign In** screen, click on **Forgot Password?**



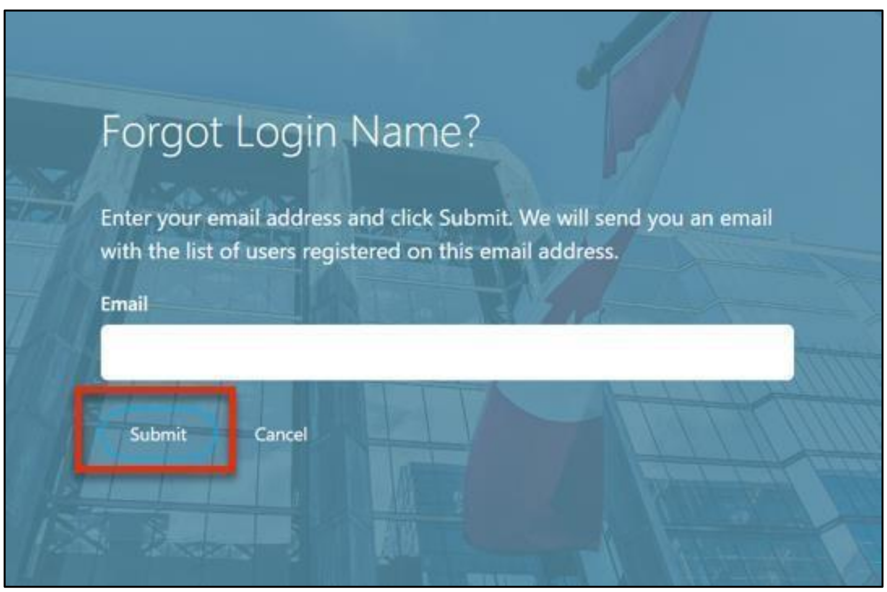
2. Select **Forgot Login Name?**



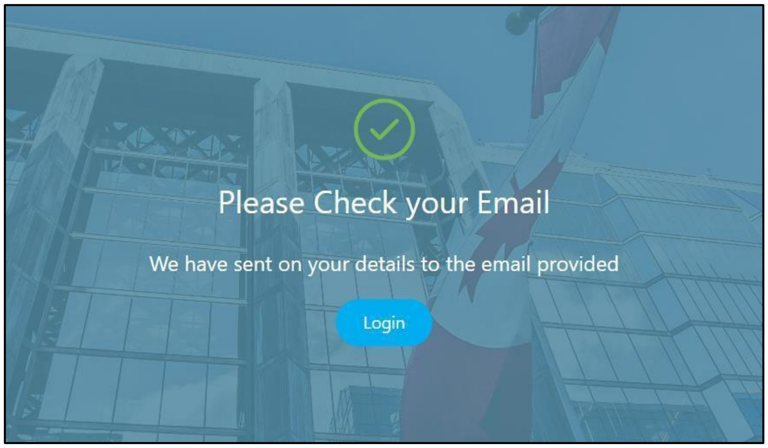
3. Enter your email address.



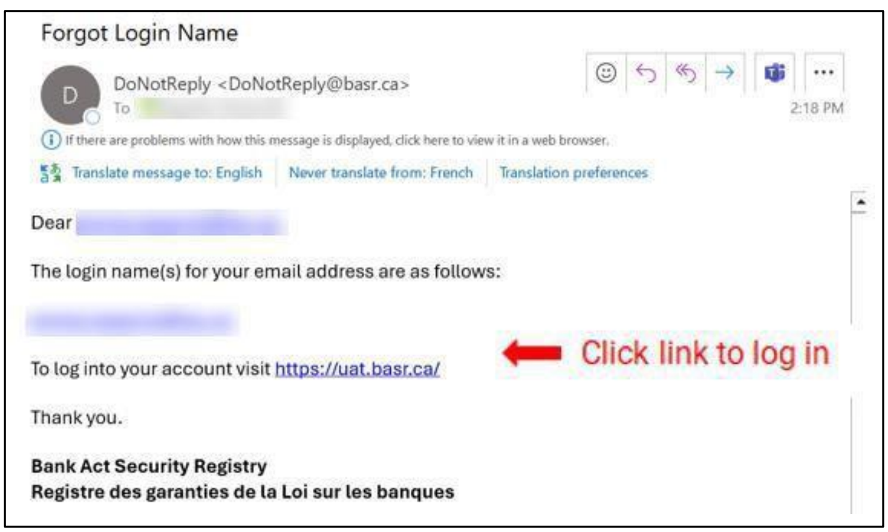
4. Click **Submit**.



5. A screen will appear prompting you to check your email for details regarding your login name. Check the junk folder if the email does not appear.

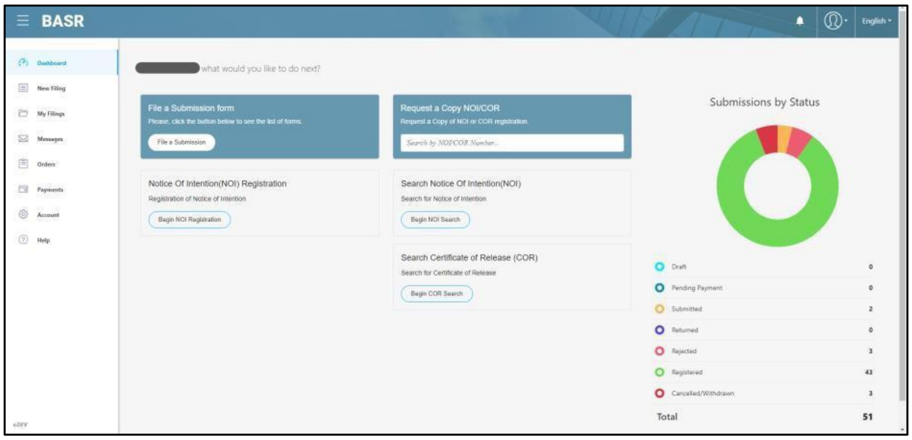


6. Check your email to find the login name(s) for your account. Click the link in the email or copy the link into your browser to take you back to the **Sign In** screen.

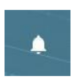


General Navigation

Once you log in, you will see a list of navigation options on the left side of your screen.



At the top left, you can click on the three lines, to make the navigation pane larger. Click the pane again to revert to the original size.



To the top right, there is a bell; this is the **Notifications** icon. Selecting this displays your notifications.

The person in a circle icon, displays **My Profile** or **Log Out**. **My Profile** is where you will find your user details and where you can make edits to your profile.

Lastly, at the top right, there is the option to select English or French language.

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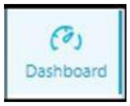
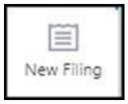
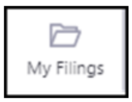
Using the navigation options on the left of your screen:



Dashboard: offers different filing options, submissions by status and navigation options



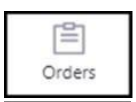
New Filing: displays options to start a new filing or update a current NOI



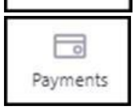
My Filings: displays all your filings and their status,
i.e., **Drafts, Submitted, Registered**, etc.

My Filings also has a filter so you can find filings between certain dates. Under **Drafts**, you have the option to continue with your filing or remove it.
Under **Submitted,** you can download what you submitted or cancel the SR. Under **Registered**, you can download the receipt from that transaction or the registration document.

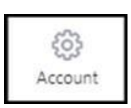
Messages: displays all messages regarding any filing type you've completed



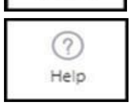
Orders: displays all requests for searches or copies of documents with a date filter



Payments: displays all payments made and any funds you may have added using the account top up option



Account: where user details are stored and edited



Help: provides links to Help content

Shortcut Keys

Shortcut Keys are a combination of keys that when pressed at one time, perform a task (such as registering a Notice of Intention (NOI)) more quickly than using a mouse. This is intended to provide greater flexibility for the user.

When you see a letter inside parentheses on a task button as shown below, you have the option to press Alt + the letter instead of clicking with the mouse (in this case Alt + s) to perform the task.

Account Management

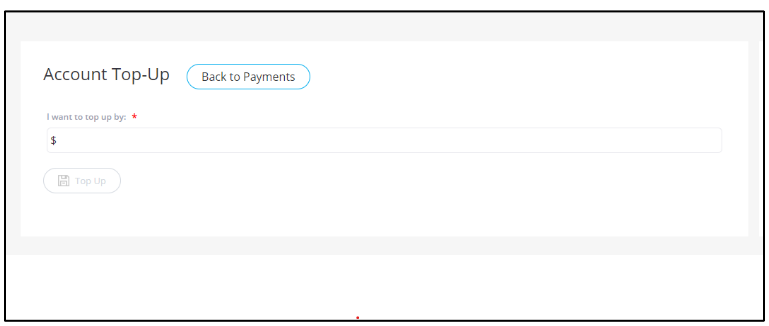
Account Payment/Top Up

Below are the instructions on how to add funds to your account once you are logged in to the Customer Portal.

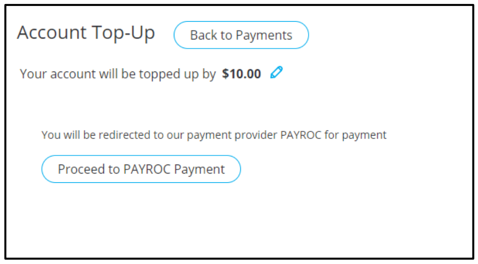
1. Select **Payments** from menu bar on the left-hand side of the screen.

2. Select **Account Top Up** in the upper right corner.

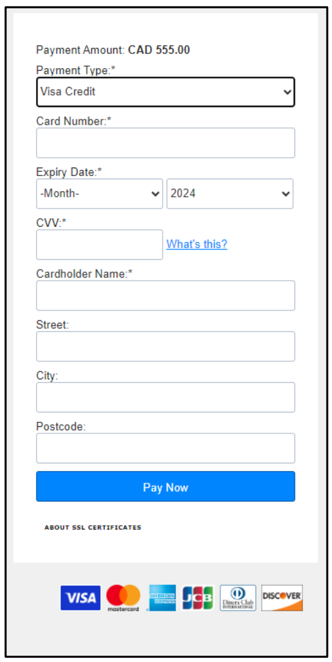
3. Enter the dollar amount you wish to top up your account by. Decimals are required. Click **Top Up.** The **Top Up** button will not be enabled until the dollar amount is entered. **Note:** There is a $10 minimum.



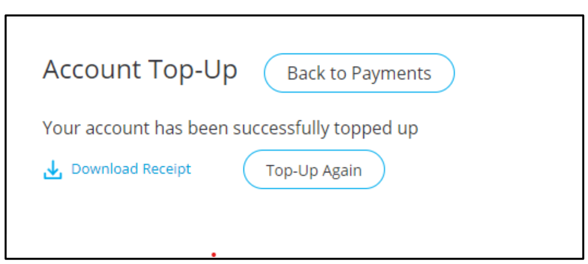
4. Click **Proceed to PAYROC Payment**. This will take you to our secure third-party site to enter your payment details.



5. Enter your payment details and complete payment by clicking **Pay Now**.

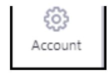


6. You will be returned to the **Customer Portal Account Top Up** screen which will show your confirmation and payment details. You will be able to download the receipt for your records.



Managing Users (Organizational Accounts)

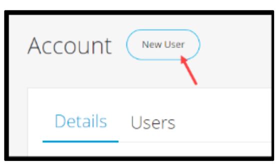
As an Administrator for an Organizational account, you determine who has access to the account and access level for each user. Administrators can view, add, modify, or make users inactive.

1. To the left of your screen click on Account. 

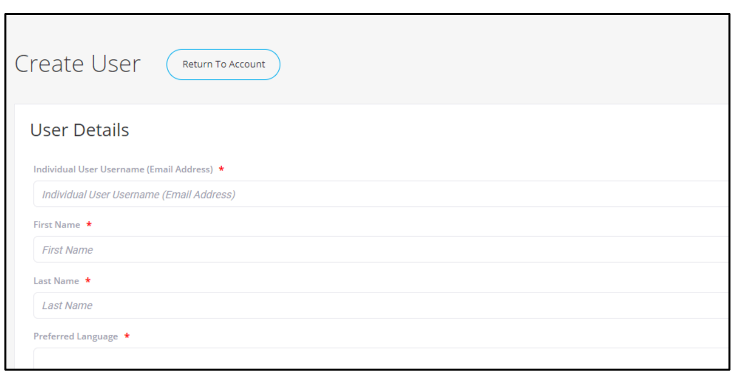
2. The **Account** screen will open to the **Details** tab, which will show your account number and account name. The type <u>must</u> read **Organization**. The Administrator will be listed as the owner. The address information will be shown for the account.

Create a New User

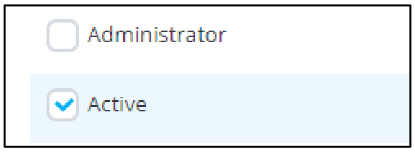
1. Click **New User** at the top of the screen.



2. Under **User Details,** complete all areas marked with a red asterisk *.



When creating a new user, you must select **Active**.

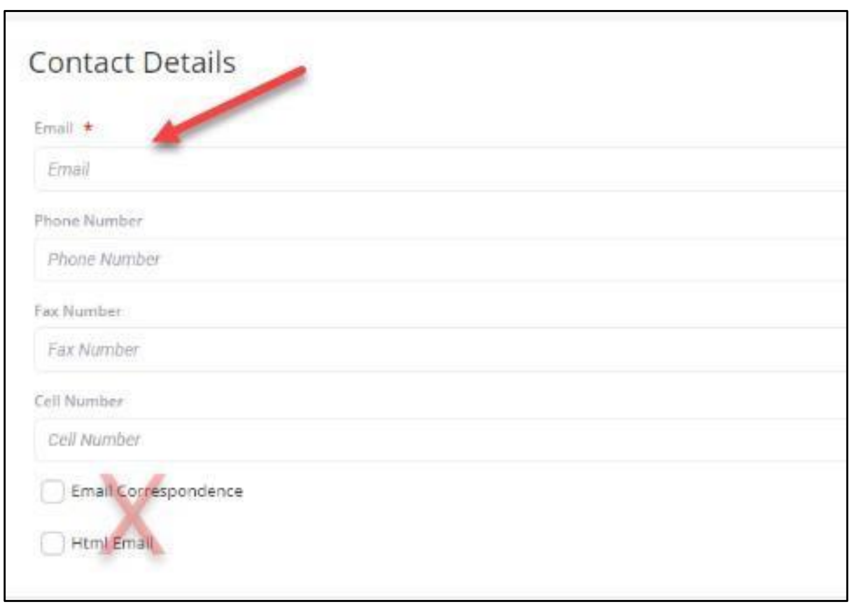


Note: There is also the option to check off **Administrator**. You will only check this option if the new user requires administrator privileges, e.g., ability to edit users' information or add new users, etc.

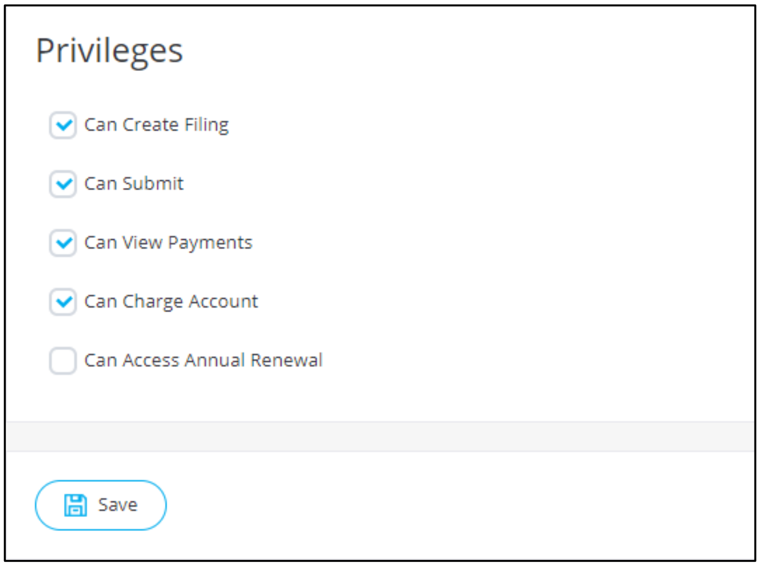
It is recommended each account have two Administrators when possible, for business continuity.

3. Under **Contact Details**, enter email address in the **Email** field and select **Email Correspondence** below.

   Note: Checking and/or unchecking the **Email Correspondence** and **Html Email** fields will <u>not</u> have an impact on correspondence output. Please disregard these fields.



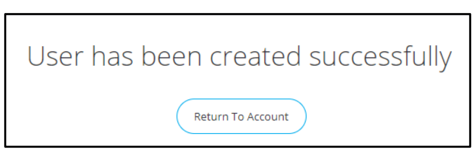
4. Under **Privileges,** select the options you wish the user to have and click **Save.** You can select all or any combination of options.



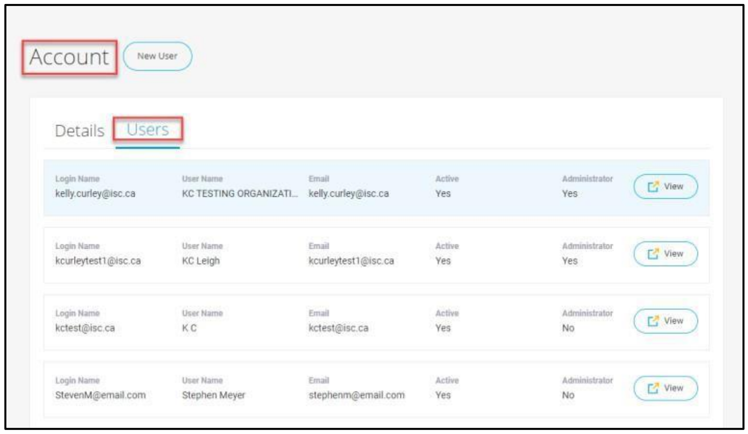
Important: If only the **Can Create Filing** is checked, registration and search requests can be created in draft, but not submitted. Ensure that **Can Submit** is checked for the ability to submit registrations and searches.

Important: to allow a user to submit Annual Renewals the user's privileges must include **Can Access Annual Renewal**.

The following message should appear on screen. Click **Return to Account**.



5. You will be taken back to the **Account** screen. Here you can validate the new user has been created. Click the **Users** tab. All users under this account will appear.

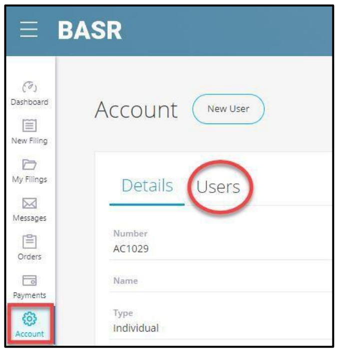


6. The system will not automatically notify the new user that they have been added. You will need to advise the new user to:
    - Go to URL: www.basr.ca.
    - Enter their Login Name (i.e., their email address)
    - Select **Forgot Password** and follow instructions from the Forgot Password section of this guide to set up their own secure password.

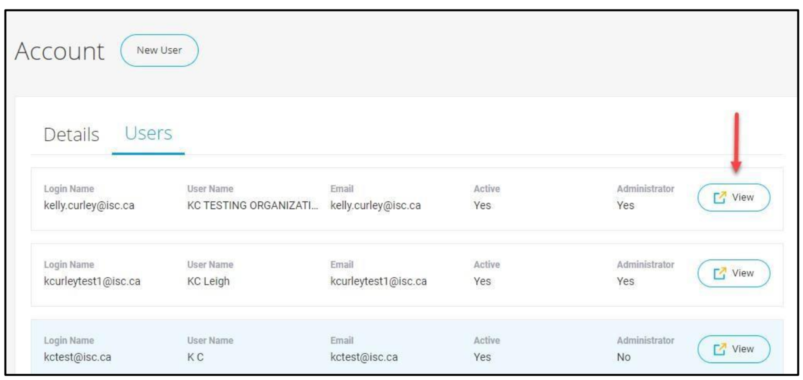
BASR

Modify Current Users

1. Click on **Account** from the menu bar on the left side of the screen. Click **Users.**

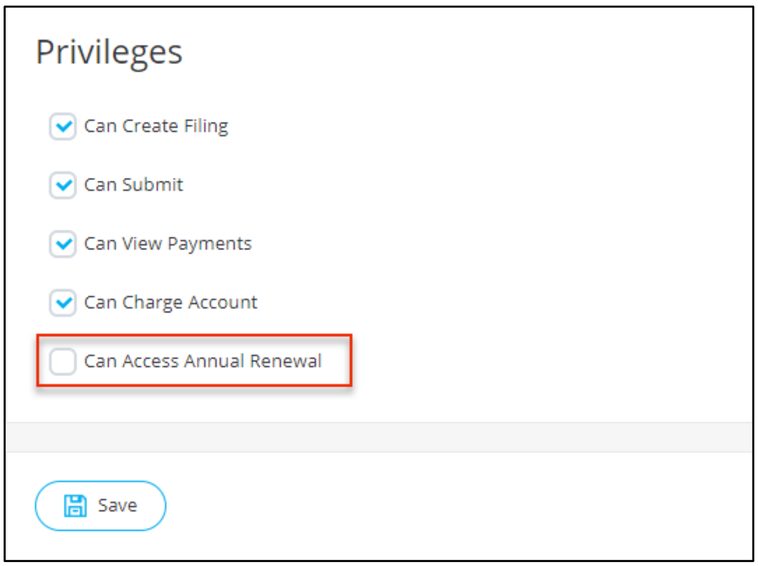


2. All users under this account will display. Locate the user you wish to modify and click **View** to the right of their name.



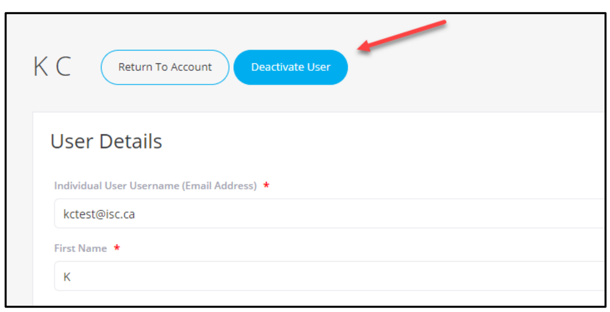
3. The user information will now appear.
    - To **edit** user information (email address, name, or privileges), make the necessary changes and click **Save** at the bottom of the screen.

    Important: to allow a user to submit Annual Renewals you must update the user's privileges to include **Can Access Annual Renewal**.

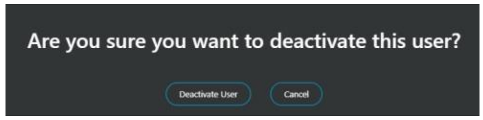


    - There are **two** ways to make a user **Inactive**.

      Remove the user all together by clicking on **Deactivate User** at the top of the screen.



You will receive the following message:

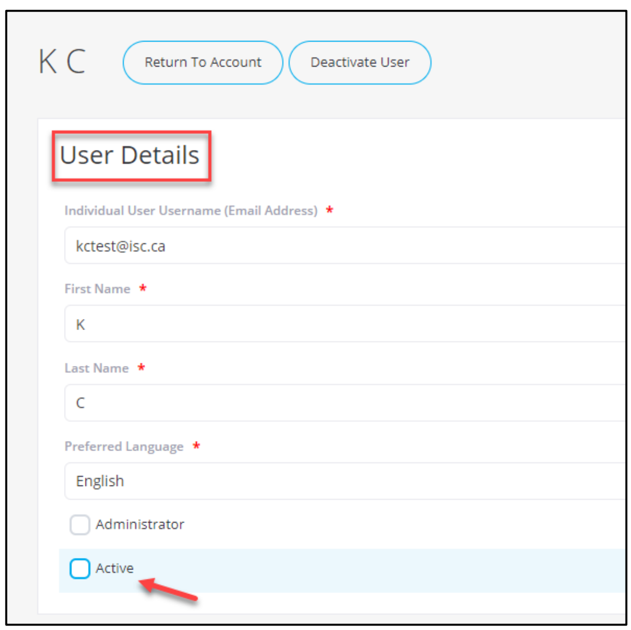


If you wish to continue, click **Deactivate User.** The system will take you back to the **Account** screen. Under the **Users** tab, the former user will no longer appear.

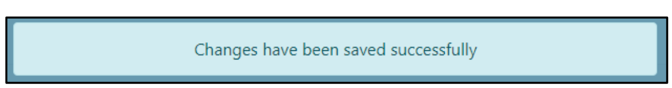
OR

Make a current user **Inactive.** Example: when a user is on leave but will be coming back.

After completing step 2 above; you will be presented with the user information, under **User Details** deselect **Active** and go to the bottom of the screen and click **Save.**



You will receive confirmation at the top of the screen that your changes have been successfully saved. Click on **Return to Account**.



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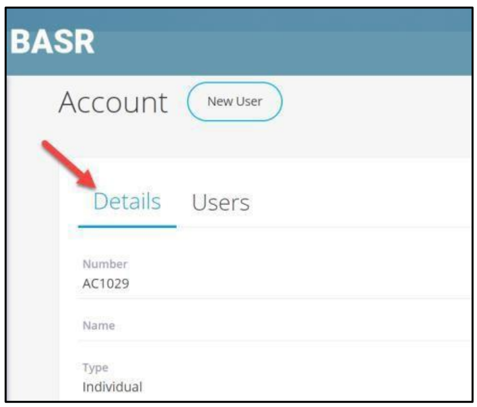
Managing Individual User Accounts

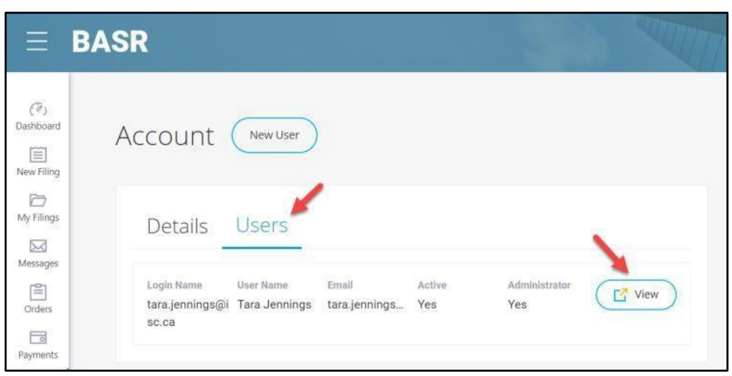
As an Individual User, you will be the only one with access to this account. You can view, add, or modify your profile and account details.

1. To the left of your screen click on 

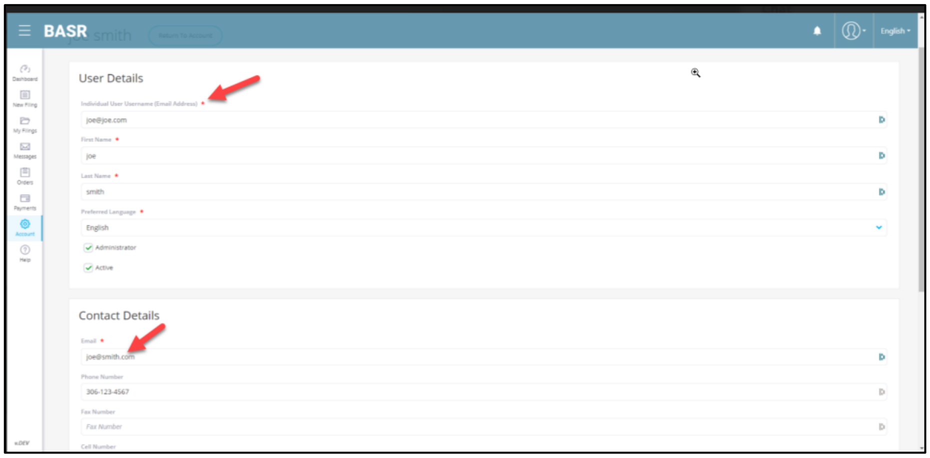
2. The **Account** screen will open to the **Details** tab, which will present the account number, owner name and address for modification. Update accordingly and click **Save** at the bottom of the screen. 



3. Clicking on the **Users** tab will open a summary of the User information. Click on **View** to open **User Details** to view or modify all **User Details**, **Contact Details** and **Privileges**.

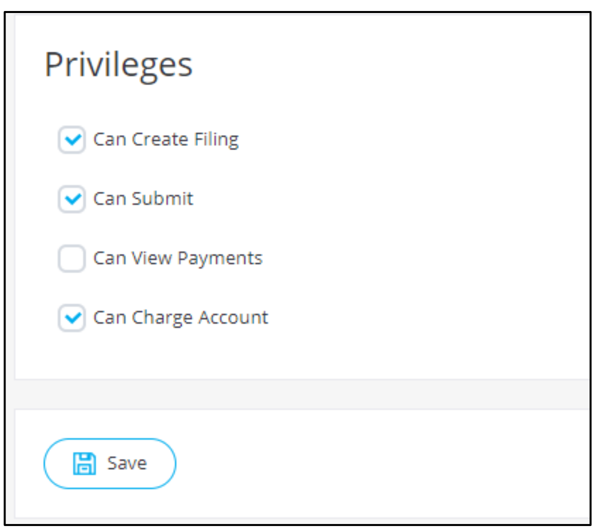


Important:
If updating the **Email** field under **Contact Details**, make sure you update the **Individual User Username (Email Address)** field under **User Details** as well.



AND

Under **Privileges,** if only the **Can Create Filing** is checked, search requests and requests for copies of documents can be created in draft, but not be submitted. Ensure that **Can Submit** is checked for the ability to submit searches and requests for copies of documents.



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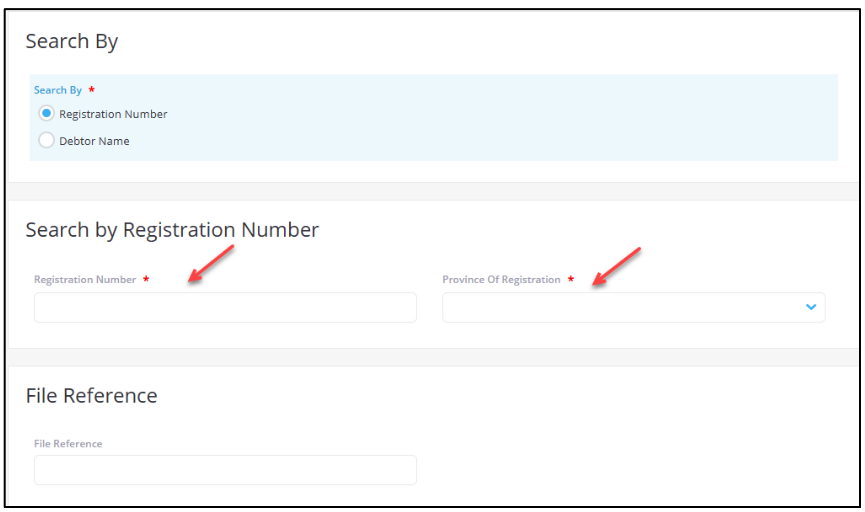
Searches

Search of Notice of Intention (NOI)

1. On your **Dashboard**, click on **Begin NOI Search**.

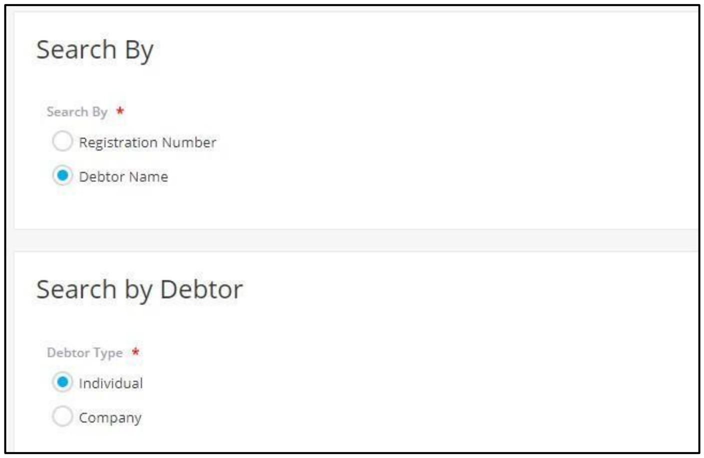
2. Select one of the search options: **Registration Number** or **Debtor Name**.

   - If selecting **Registration Number**, enter the registration number in the **Registration Number** field and select the **Province of Registry**.

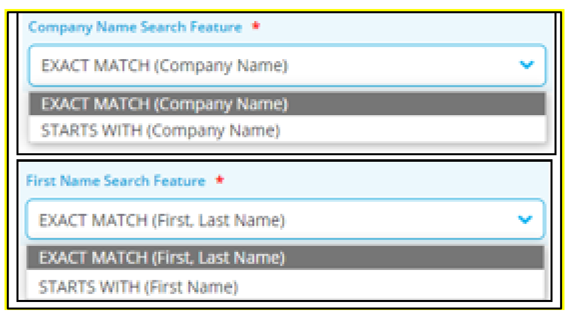


   - Enter the **File Reference** if applicable. **Note**: This field is optional and allows entry of customer file details/account information. The **File Reference** will display in Search results; however, you cannot search an NOI or COR using the **File Reference**. The **File Reference** will also be displayed in the **My Filings**, **Orders**, and **Payments** tabs.

If selecting **Debtor Name**, select either **Individual** or **Company**.



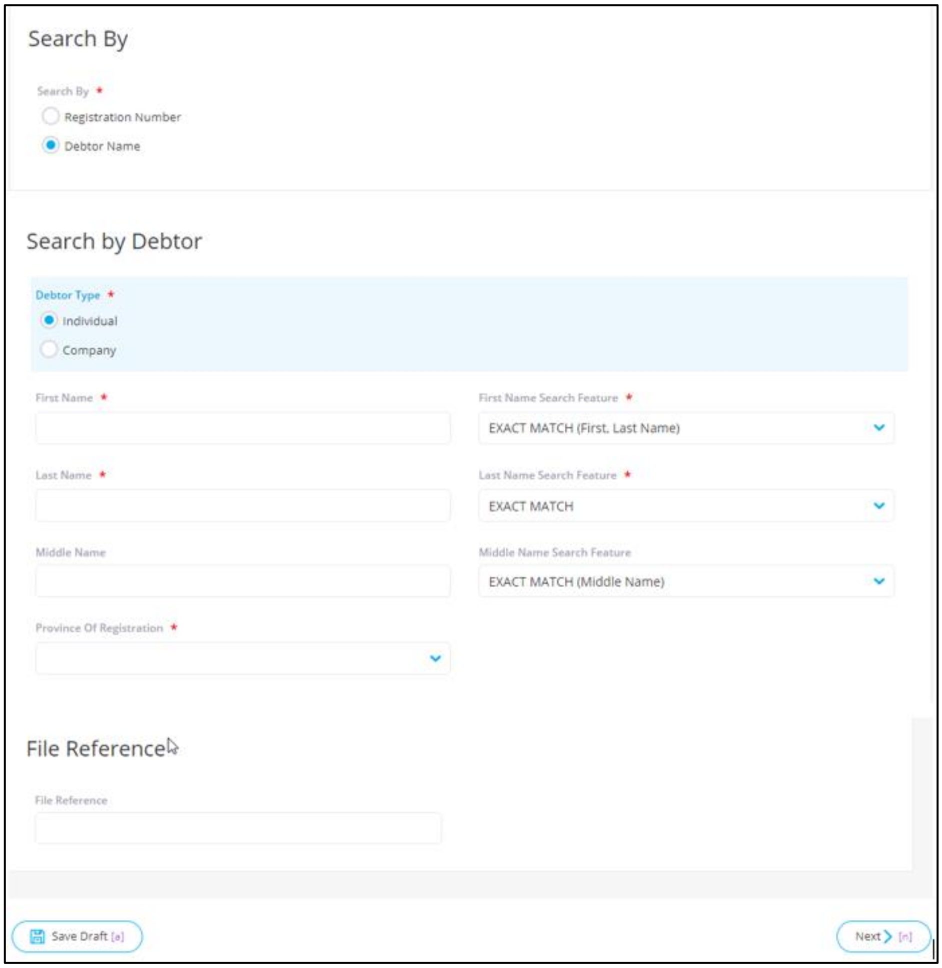
- In the dropdown menus next to each of the name fields, you can select **Exact** or **Starts With**, which allows you to search for partial names or misspelled names.



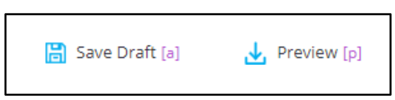
- Enter the **File Reference** if applicable. **Note**: This field is optional and allows entry of customer file details/account information. The **File Reference** will display in Search results; however, you cannot search an NOI or COR using the **File Reference**. The **File Reference** will also be displayed in the **My Filings**, **Orders**, and **Payments** tabs.

3. Select **Next** once you have completed entry of the information in the required fields (indicated by a red asterisk *).

Example:



4. You are now at the **Review** screen; review all information and make sure it is correct. You will have the option to **Save as a Draft** or **Preview** the Notice of Intention Search, at the bottom of the screen.



When all information is deemed to be correct, you must check off the **Confirmation** statement located at the bottom of the screen. Click **Submit.**

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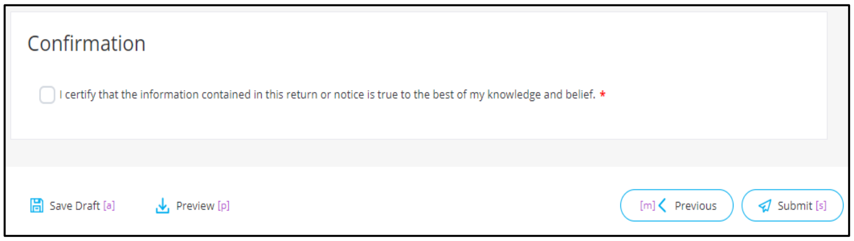
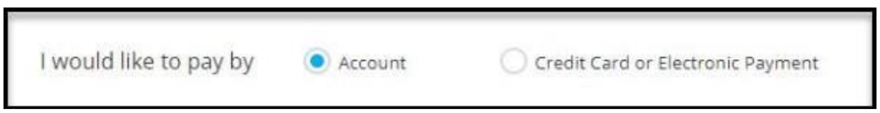


5. **Payment** if you have funds in your account, you will be prompted to choose your preferred payment method: Account or Credit Card. If your account does not have adequate funds, the only option is Credit Card.

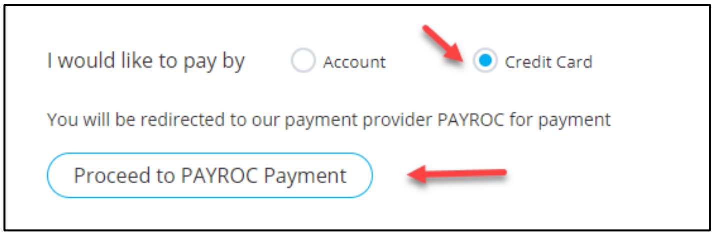
   Note: To pay by Debit or Pre-authorized Debit, select Credit Card.



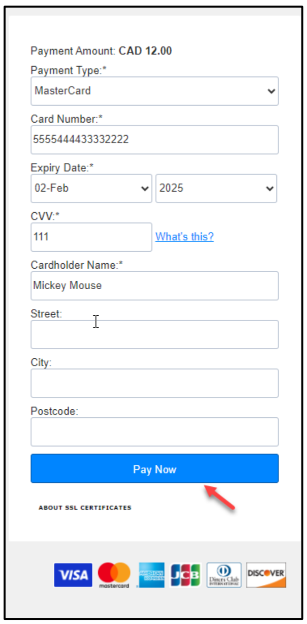
   If you selected **Account**, review **Your Current Balance** and **Total Due** fields to ensure enough funds are available.

   Once funds have been confirmed, Click **Pay by Account**. Payment is automatically processed from funds in your account.

   If you selected **Credit Card**, click P**roceed to PAYROC Payment.**

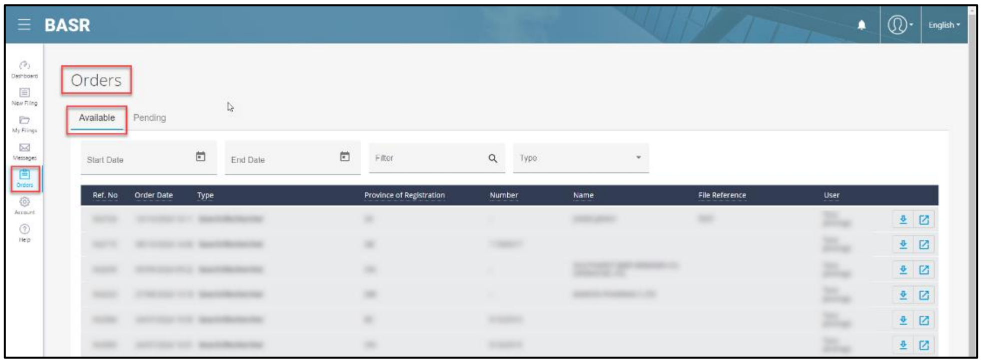


This will take you to the secure virtual terminal where you will enter your credit card information and complete payment by clicking **Pay Now**.



6. Upon successful completion of the transaction, you will see a **Payment Received** and a **Submission Received** notice. This screen will provide you with your Filing Reference/Service Request (SR) number.

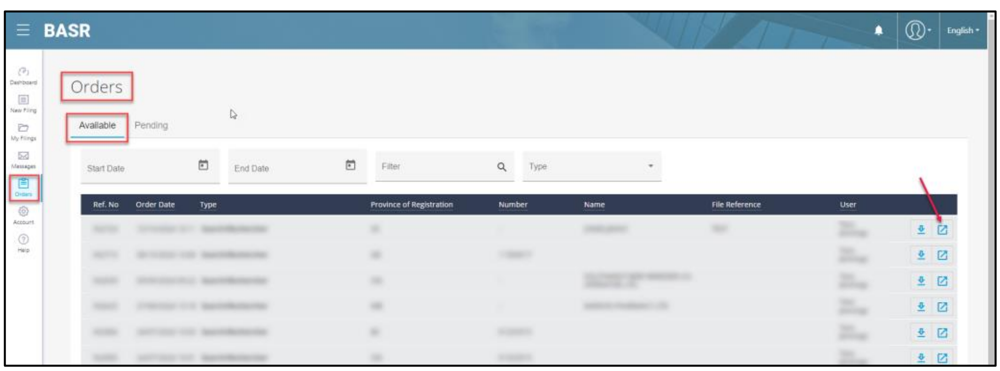
7. The search results will appear in **Orders** under the **Available** tab once the results are ready.



8. To view the results, Go to **Orders** on the left of the screen. Your request for a copy will appear show here. On the right of your order, there are two icons – **Download** and **Open Details** .

  - **Download** opens a PDF version of the NOI document.

  - **Open Details** provides the order details, the entity details, and the option to download a copy of your document.

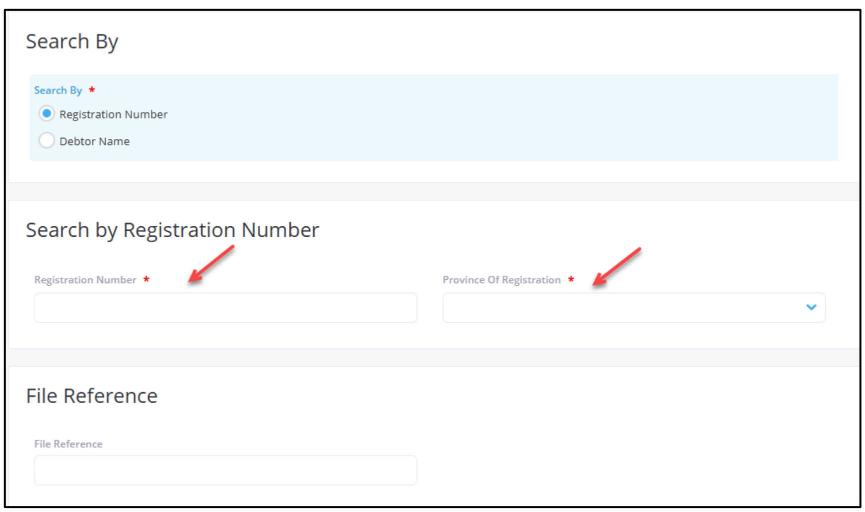


Search of Certificate of Release (COR)

1. On your **Dashboard**, click on **Begin COR Search**.

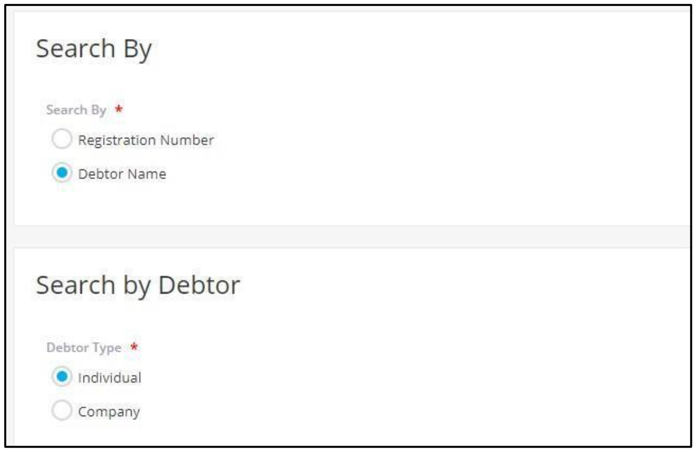
2. Select one of the search options: **Registration Number** or **Debtor Name.**

   - If selecting **Registration Number**, enter the registration number in the required **Registration Number** field and select the **Province of Registry**.

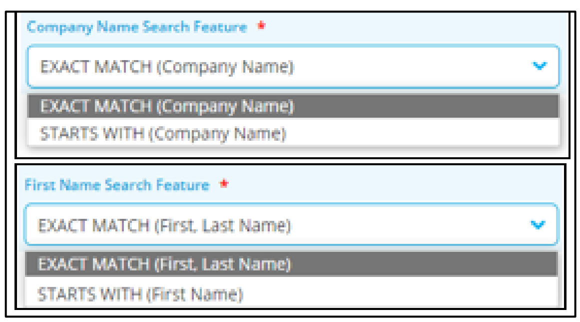


   - Enter the **File Reference** if applicable. **Note**: This field is optional and allows entry of customer file details/account information. The **File Reference** will display in Search results; however, you cannot search an NOI or COR using the **File Reference**. The **File Reference** will also be displayed in the **My Filings**, **Orders**, and **Payments** tabs.

- If selecting **Debtor Name**, select either **Individual** or **Company**.



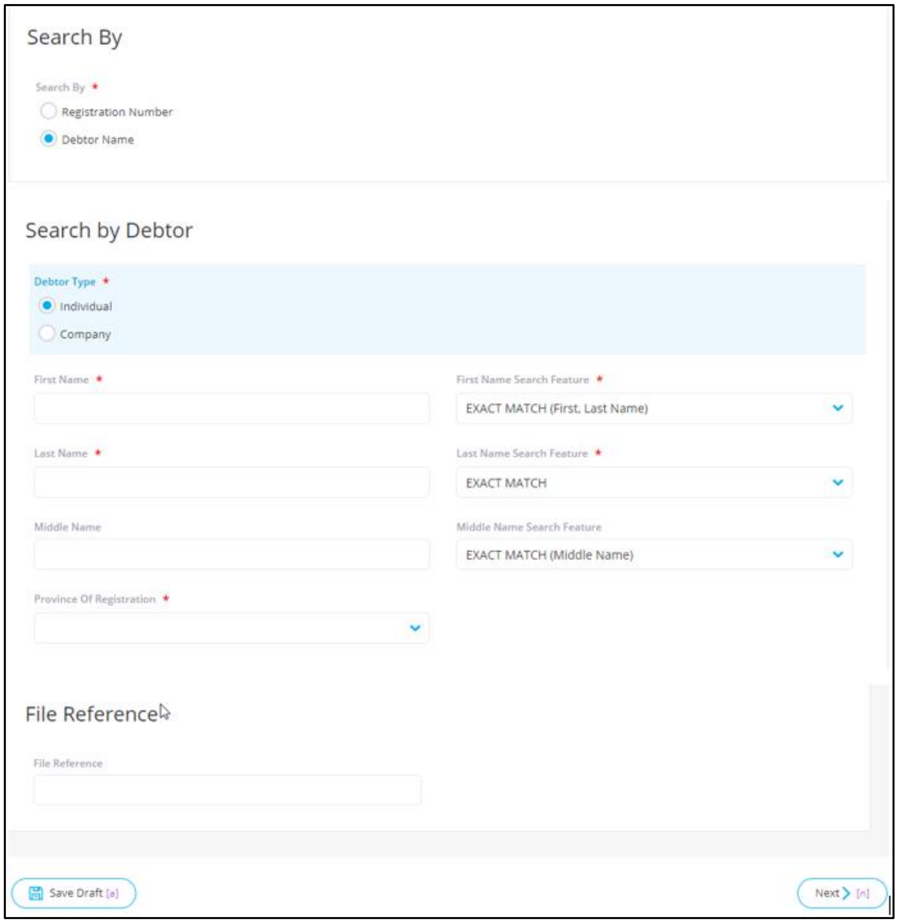
- In the dropdown menus next to each of the name fields, you can select **Exact** or **Starts With**, which allows you to search for partial names or misspelled names.



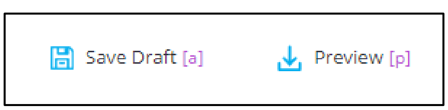
- Enter the **File Reference** if applicable. **Note**: This field is optional and allows entry of customer file details/account information. The **File Reference** will display in Search results; however, you cannot search an NOI or COR using the **File Reference**. The **File Reference** will also be displayed in the **My Filings**, **Orders**, and **Payments** tabs.

3. Select **Next** once you have completed the information in the required fields (indicated by a red asterisk *) above.

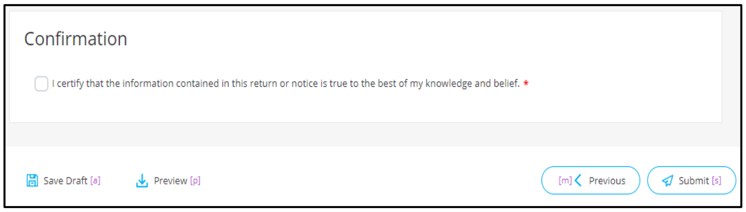
Example:



4. You are now at the **Review** screen; review all information and make sure it is correct. You will have the option to **Save as a Draft** or **Preview** the Certificate of Release Search, at the bottom of the screen.

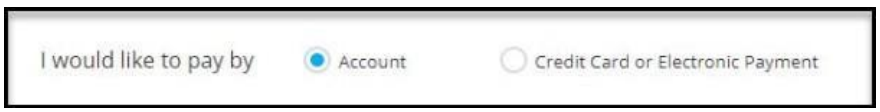


When all information is deemed to be correct, you must check off the **Confirmation** statement located at the bottom of the screen. Click **Submit.**

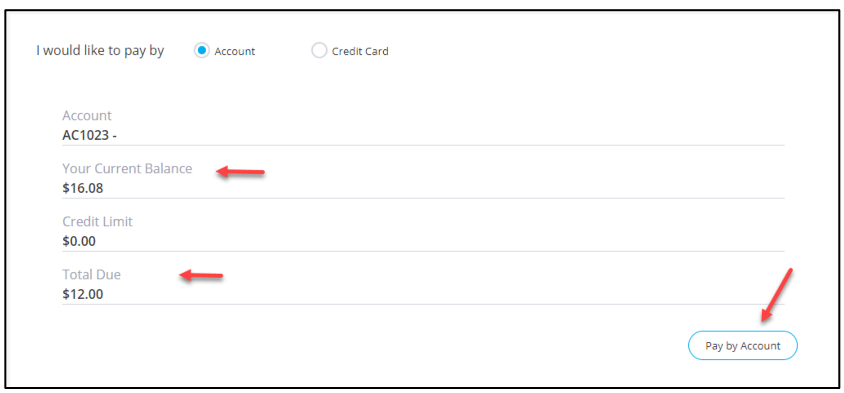


5. **Payment** if you have funds in your account, you will be prompted to choose your preferred payment method: Account or Credit Card. If your account does not have adequate funds, the only option will be Credit Card.

   Note: To pay by Debit or Pre-authorized Debit, select Credit Card.

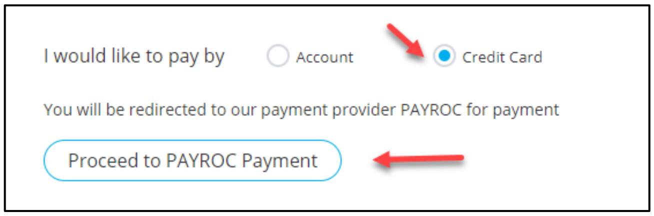


   If you selected **Account**, review **Your Current Balance** and **Total Due** fields to ensure enough funds are available.

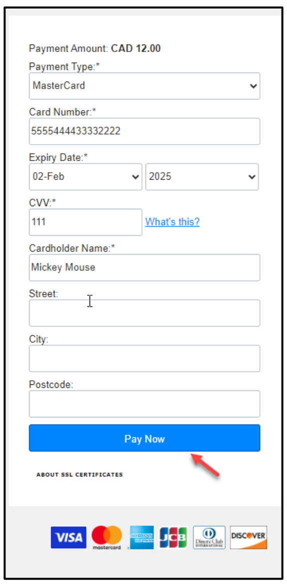


   Once funds have been confirmed, Click **Pay by Account**. Payment is automatically processed from funds in your account.

   If you selected **Credit Card**, click **Proceed to PAYROC Payment.**

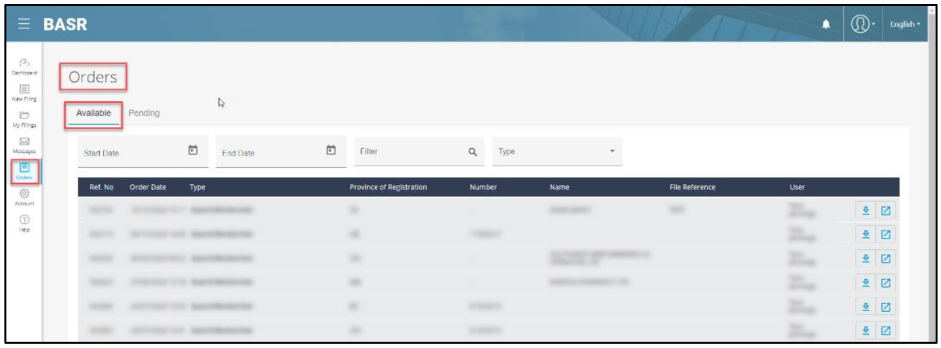


This will take you to the secure virtual terminal where you will enter your payment details and complete payment by clicking **Pay Now**.



6. Upon successful completion of the transaction, you will see a **Payment Received** and a **Submission Received** notice. This screen will provide you with your **Filing Reference/Service Request (SR)** number.

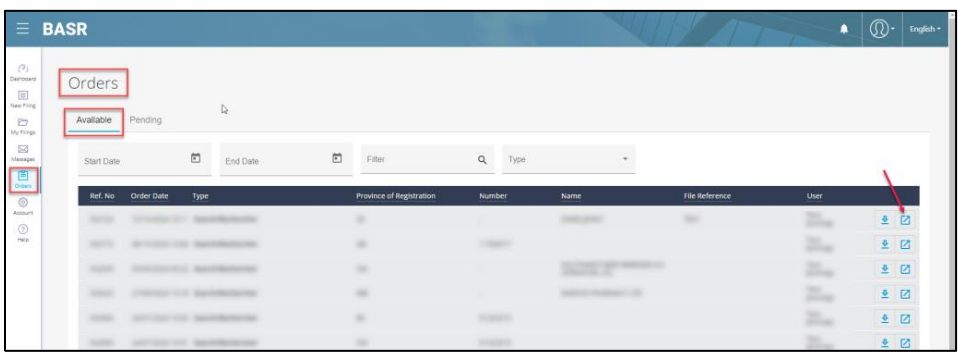
7. The search results will appear in **Orders** under the **Available** tab once the results are ready.



8. To view the results, Go to **Orders** on the left of the screen. Your request for a copy will appear here. On the right of your order, there are two icons – **Download** and **Open Details**.

   - **Download** opens a PDF version of the COR document.

   - **Open Details** provides the order details, the entity details, and the option to download a copy of your document.



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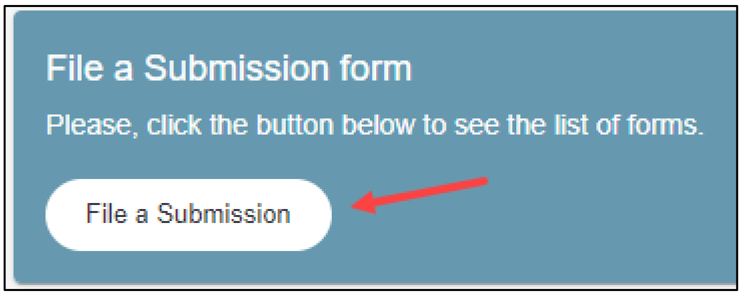
Registrations

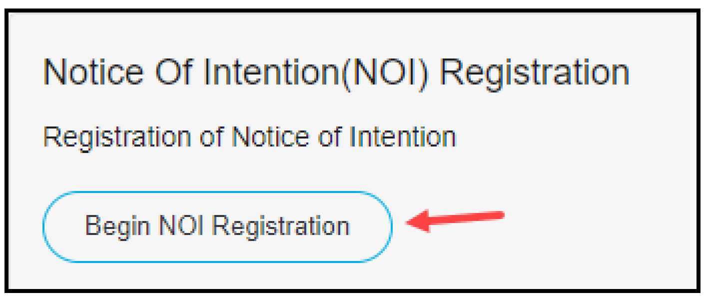
Registration of a Notice of Intention (NOI)

There are **three** different ways you can start an NOI registration, all located on your dashboard:

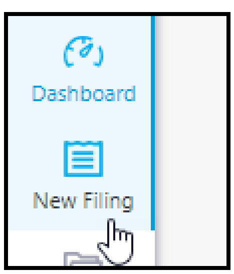
A. **File a Submission**



B. **Begin NOI Registration**



C. **New Filing** (found on the left side of screen).

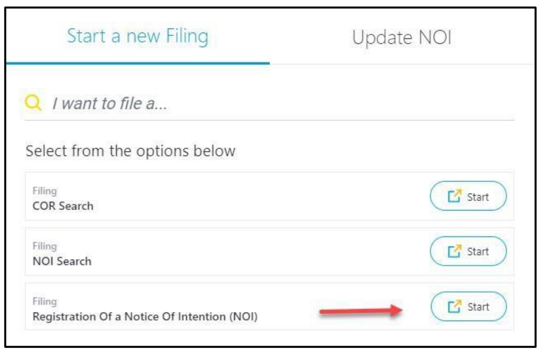


For these instructions we will be using option A - **File a Submission.** Please note that all fields with a red asterisk * are mandatory fields and must be completed.

2. Click on **File a Submission**.

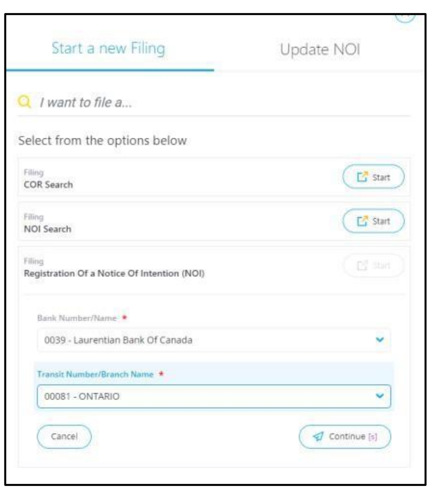
3. Your options present to the right.

4. Click **Start** beside **Registration of a Notice of Intention (NOI).**



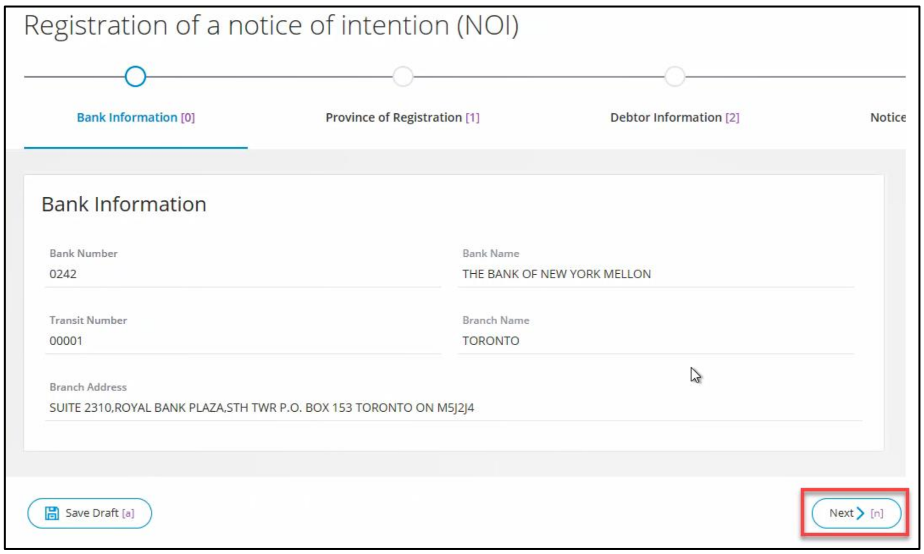
5. **Bank Number/Name** presents; from the drop-down list, pick the correct bank.

6. **Transit Number/Branch Name** presents; from the drop-down list select the correct transit number.



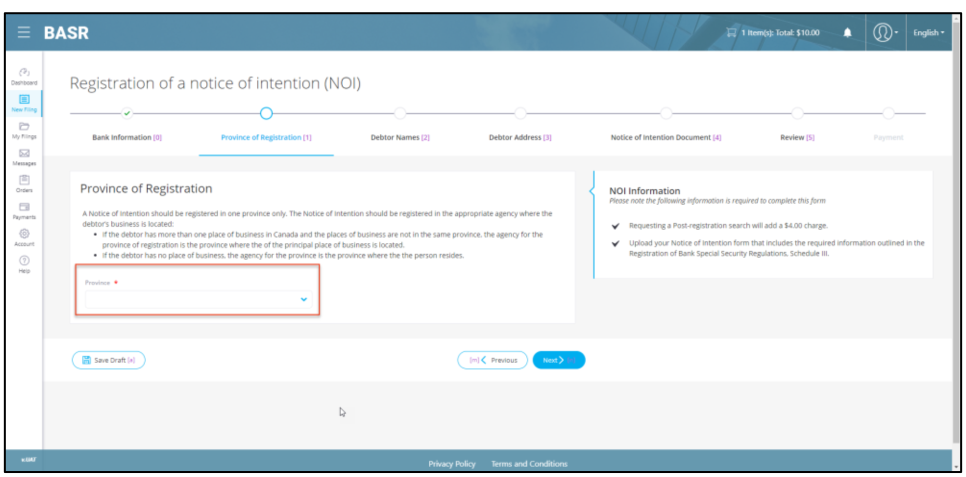
7. Click **Continue** at the bottom of the screen.

8. The **Registration of a Notice of Intention (NOI)** form presents. Review **Bank Information** to ensure it is correct. Click **Next** at the bottom of the screen.

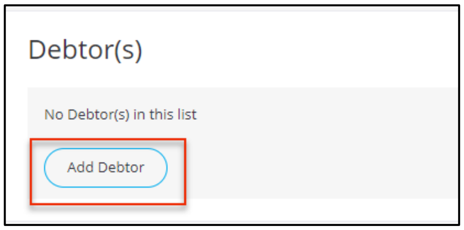


9. **Province of Registration** screen displays. Select the province from the dropdown menu. Click **Next**.

   Note: A Notice of Intention should be registered in one province only.

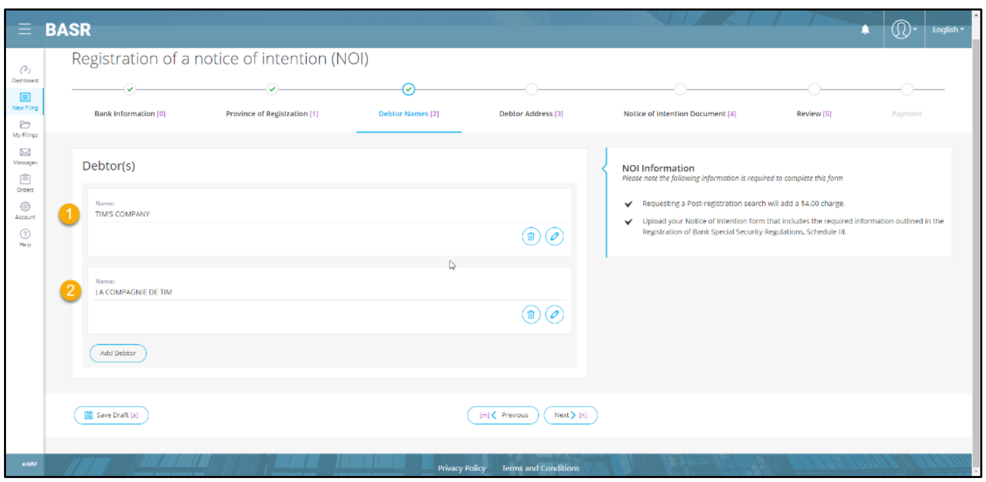


10. **Debtor Names** screen displays. Click **Add Debtor**.



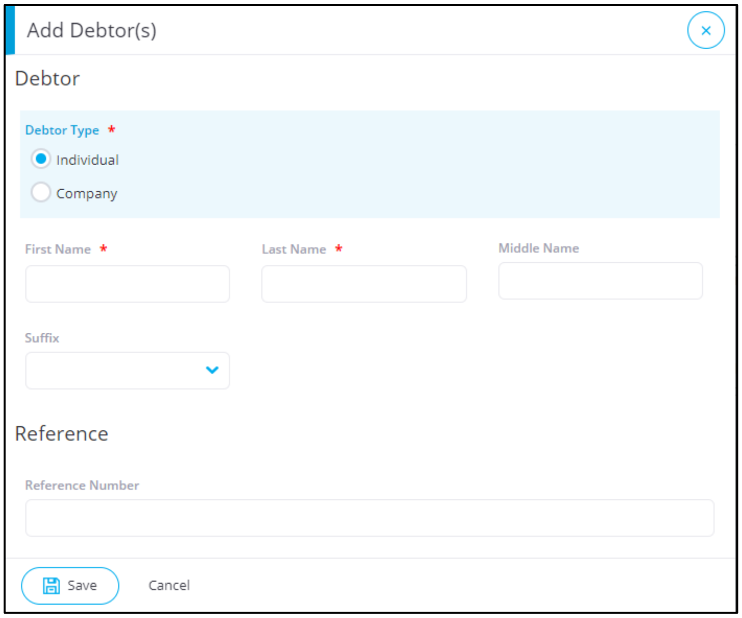
11. **Add Debtors** screen appears:
    - Select **Individual** or **Company**
    - Enter individual or company name(s).

    Important:
    Company names that contain both English and French should not be entered as a single debtor name. (e.g. Tim's Company / Le Compagnie de Tim). Please set out the English name as one debtor and the French name as a separate debtor.



    - Enter the **File Reference (Reference Number)** if applicable. **Note**: This field is optional and allows entry of customer file details/account information. The **File Reference** will display in Search results; however, you cannot search an NOI or COR using the **File Reference**. The **File Reference** will also be displayed in the **My Filings**, **Orders**, and **Payments** tabs.

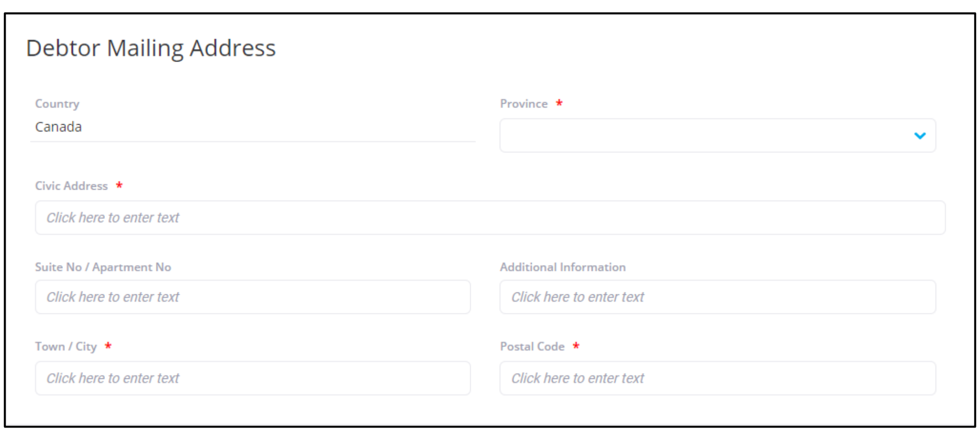
- Click **Save**.



12. Review the information presented on the **Debtor Names** screen. You will have the option to either remove or edit the information on screen. You can add a second debtor by selecting **Add Debtor**. Once all debtors have been added, click **Next**.

13. The **Debtor Address** screen displays.

    Important:
    The address information entered must match the debtor address information that is found on the NOI attachment.



- Select Province.
- Enter civic address
- **Additional Information** field should be used for c/o information, (i.e., address line 2).
- Enter Town/City.
- Enter the Postal Code.

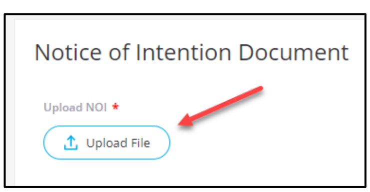
14. Click **Next**.

15. The **Notice of Intention Document** screen will open. You must upload your Notice of Intention document in PDF format. Maximum size 10 MB. Please review the Notice of Intention document prior to uploading to ensure all criteria have been met. See **NOI Form Attachment Checklist** table below.

Register Notice of Intention
NOI Form Attachment
Checklist

Minimum requirements for the NOI form	Notes
1. .pdf version of the original signed NOI form.	
2. Information on the form contains, at minimum, the language and data prescribed in the Registration of Bank Special Security Regulations, Schedule III.	The NOI form may include additional information, such as the chartered bank and debtor titles and signatures. The applicable NOI form will be provided for all Copy of Notice of Intention requests.
3. Debtor name(s) – may include one or more individual(s) and/or company(s).	Must match the information entered on the submission document.
4. Complete mailing address for the principal address of the debtor (must be in Canada).	The address on the NOI form must match the address information for <u>at least one</u> of the debtors entered on the submission document.
5. Location and date the NOI form was signed.	
6. Original signature of/on behalf of the debtor(s).	The .pdf upload must be a scan of the original document that contains an original wet/manual signature or an image of a manual signature. Any other forms of signatures (DocuSign, Adobe signature, stylized computer font, etc.) are not acceptable.
7. 5-digit transit/branch number of the lending chartered bank.	Must match the information entered on the submission document.
8. There is no text or markings on the bottom 3 inches of the NOI form.	The digital BASR certification stamp will be applied to the bottom of the NOI form at the time of registration.

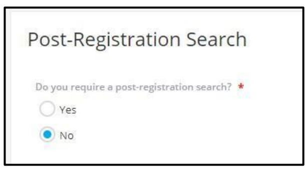
16. Select **Upload File**.



The following screen will appear and you either **Select a File** or **Drop one file here**.

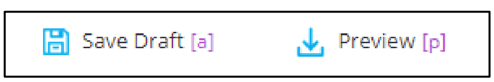
Enter any additional information in the **Additional Information** field, if necessary.

17. An option for **Post-Registration Search** is available; you must select **Yes** or **No**.

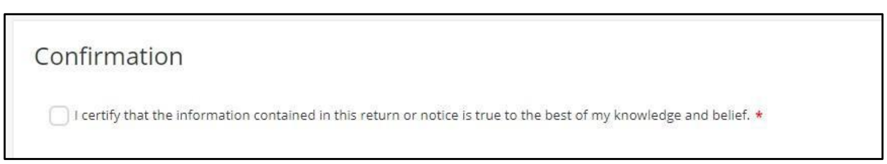


18. Click **Next** at the bottom of the screen.

19. You are now at the **Review** screen; review all information and make sure it is correct. You will have the option to **Save as a Draft** or **Preview** the NOI at the bottom of the screen.

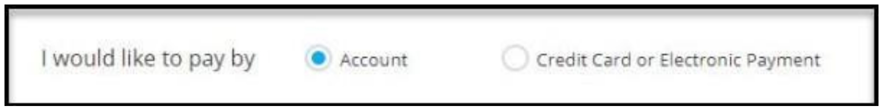


When all information is deemed to be correct, you must check off the Confirmation statement located at the bottom of the screen. Click **Submit.**

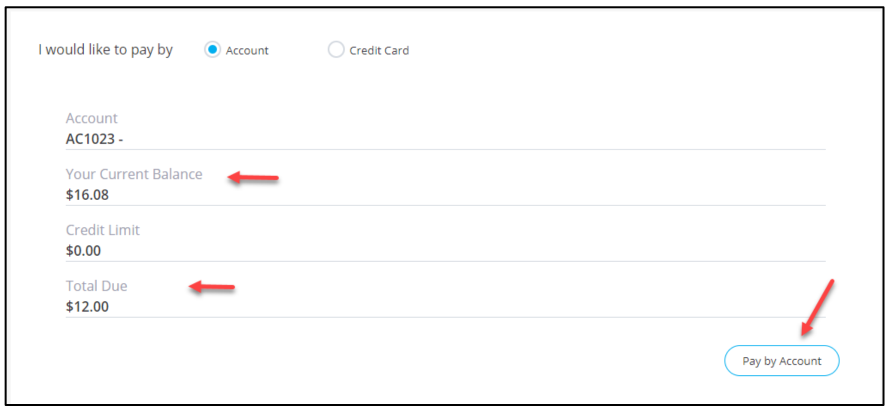


20. **Payment** if you have funds in your account, you will be prompted to choose your preferred payment method: Account or Credit Card. If your account does not have adequate funds, the only option will be Credit Card.

Note: To pay by Debit or Pre-authorized Debit, select Credit Card.

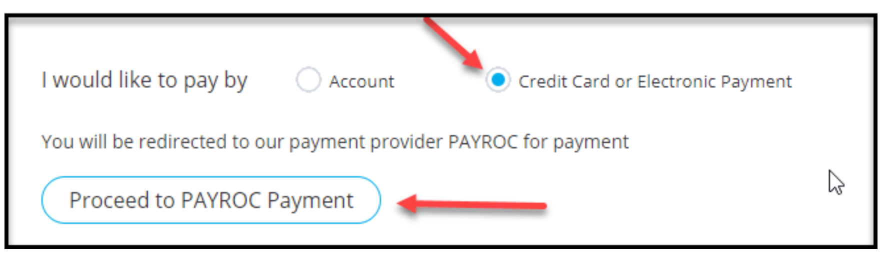


If you selected **Account**, review **Your Current Balance** and **Total Due** fields to ensure enough funds are available.

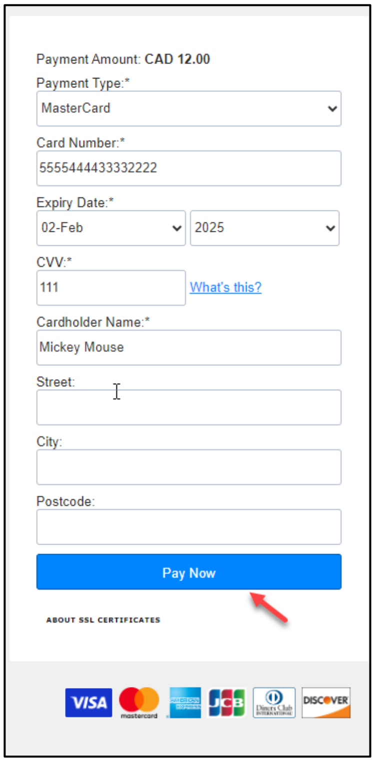


Once funds have been confirmed, Click **Pay by Account**. Payment is automatically processed from funds in your account.

If you selected **Credit Card**, click **Proceed to PAYROC Payment.**

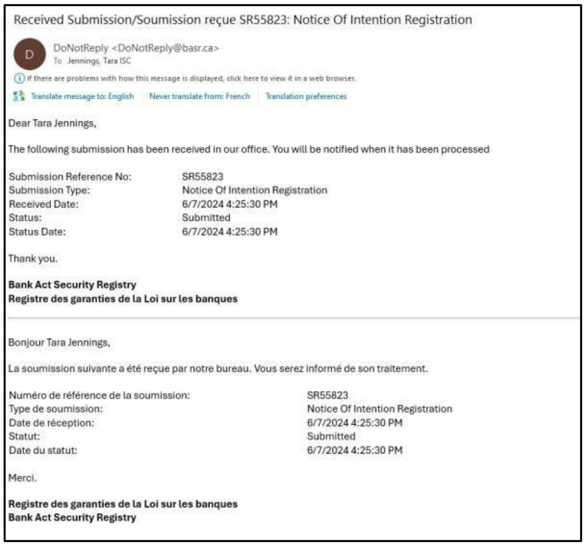


This will take you to the secure virtual terminal where you will enter your payment details and complete payment by clicking **Pay Now**.



21. Upon successful completion of the transaction, you will see a **Payment Received** and a **Submission Received** notice. This screen will provide you with your **Filing Reference/Service Request (SR)** number.

22. Once your request has been received, you will be sent a **Received Submission** confirmation email**.**



Received Submission/Soumission reçue SR55823: Notice Of Intention Registration

DoNotReply <DoNotReply@basr.ca>
To: Jennings, Tara ISC

If there are problems with how this message is displayed, click here to view it in a web browser.

Translate message to: English | Never translate from: French | Translation preferences

Dear Tara Jennings,

The following submission has been received in our office. You will be notified when it has been processed

Submission Reference No:	SR55823
Submission Type:	Notice Of Intention Registration
Received Date:	6/7/2024 4:25:30 PM
Status:	Submitted
Status Date:	6/7/2024 4:25:30 PM

Thank you.

Bank Act Security Registry
Registre des garanties de la Loi sur les banques

Bonjour Tara Jennings,

La soumission suivante a été reçue par notre bureau. Vous serez informé de son traitement.

Numéro de référence de la soumission:	SR55823
Type de soumission:	Notice Of Intention Registration
Date de réception:	6/7/2024 4:25:30 PM
Statut:	Submitted
Date du statut:	6/7/2024 4:25:30 PM

Merci.

Registre des garanties de la Loi sur les banques
Bank Act Security Registry

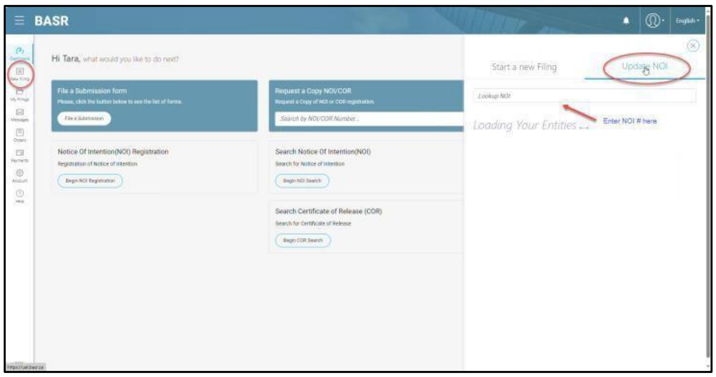
23. The service request is then sent to the central processing facility for processing.

Registration events must be manually examined by the Central Processing Facility. Once the registration is complete, the status will be updated in your **My Filings** tab in Customer Portal typically within one business day. You will also receive notification in your **Messages** tab. See the General Navigation section of this guide for instructions to access these tabs.

Registration of Certificate of Release (COR)

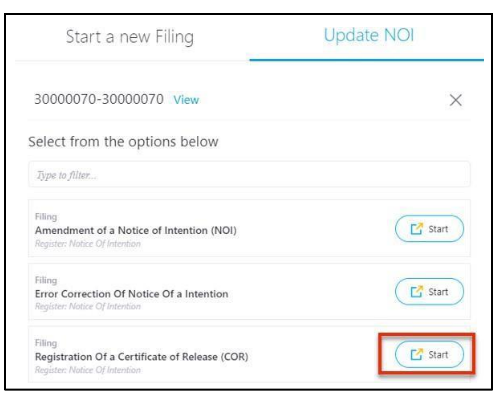
1. Select **New Filing** from the menu bar on the left side of the screen.

2. Your options display on the right. Select **Update NOI** tab.

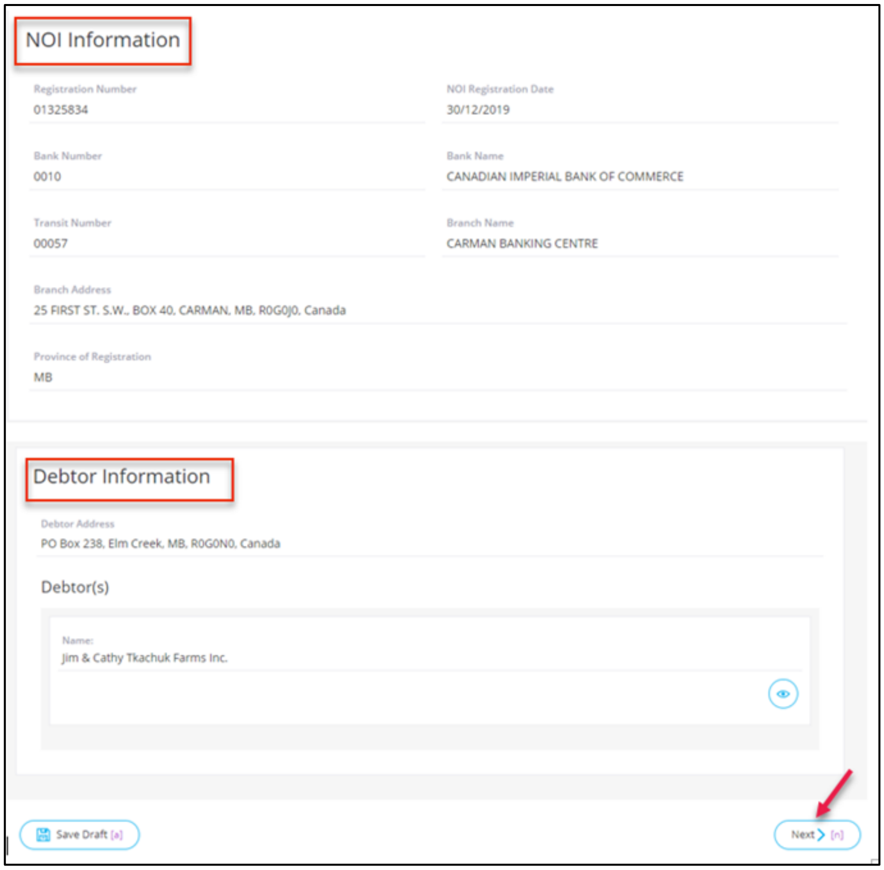


3. Type the **Notice of Intention (NOI)** number in the **Lookup NOI** search bar as shown below. Click on the number when it appears.

4. A new screen with 3 options to choose from will appear. Click **Start** beside **Registration of a Certificate of Release (COR)**.



5. Review and confirm all information in the **NOI Information** and **Debtor Information** fields. Click **Next.**



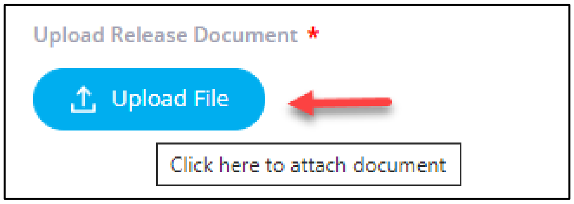
6. Select the appropriate **Reason for Release**.

   <u>Note:</u> Date of Release defaults to current date.

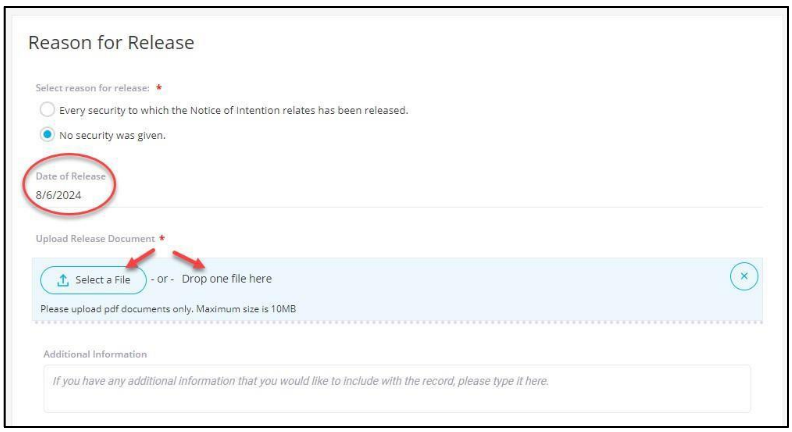
   You <u>must</u> upload your **Certificate of Release** in PDF format. Maximum size 10 MB. Please review the Certificate of Release document prior to uploading to ensure all criteria have been met. See **COR Form Attachment Checklist** table below.

Register Certificate of Release COR Form Attachment Checklist	
Minimum requirements for the COR Form	**Processing Notes**
1. .pdf of the original letter prepared on chartered bank letterhead.	
2. Name of Bank	*Must match the information on the original registered NOI form. *Branch and transit number are optional and may not match the original NOI.
3. Province Of Registry	Must match the original NOI Document
4. Name of all debtor(s) as per the Notice of Intention.	Must match exactly to the information on the original registered NOI form.
5. Notice of Intention Registration Number.	Must match exactly to the information entered on the Customer Portal or the offline forms AND to the original registered NOI form.
6. Registration date the Notice of Intention was registered at the Registrar.	Optional
7. One of the following phrases as per the Bank Act: a. *Every security to which the Notice of Intention relates has been released.* b. *No security was given.*	Must match the information entered on the Customer Portal or the offline forms.
8. Original signature of/on behalf of the chartered bank as per the Notice of Intention.	The .pdf upload must be a scan of the original document that contains an original wet/manual signature or an image of a manual signature. Any other forms of signatures (DocuSign, Adobe signature, stylized computer font, etc.) are not acceptable.
9. There is no text or markings on the bottom 3 inches of the NOI form.	The digital BASR certification stamp will be applied to the bottom of the COR form at the time of registration.

7. Select **Upload File** and attach the required document.

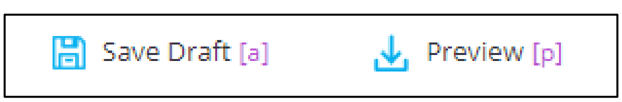


The following screen will appear and you either **Select a File** or **Drop one file here.**

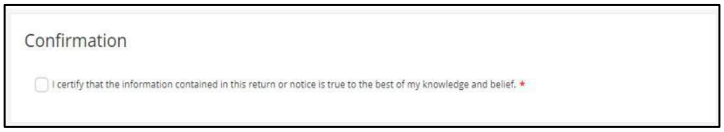


Enter any additional information in the **Additional Information** field, if necessary. Click **Next.**

8. You are now at the **Review** screen; review all information and make sure it is correct. You will have the option to **Save as a Draft** or **Preview** the COR, at the bottom of the screen.

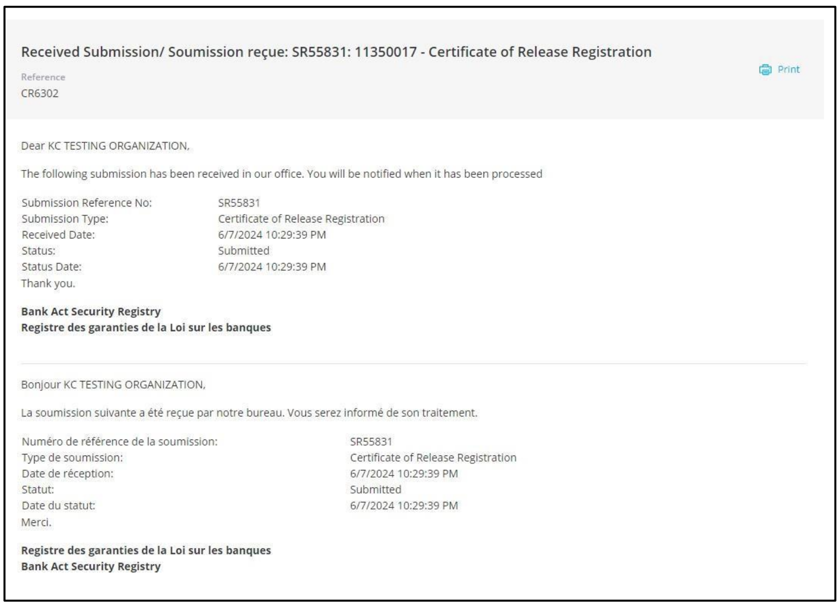


When all information is deemed to be correct, you must check off the **Confirmation** statement located at the bottom of the screen. Click **Submit.**



9. Upon successful completion of the transaction, you will see a Submission Received notice. This screen will provide you with your **Filing Reference/Service Request (SR)** number.

   You will also receive an email confirming receipt of your submission.



Received Submission/ Soumission reçue: SR55831: 11350017 - Certificate of Release Registration

Print

Reference
CR6302

Dear KC TESTING ORGANIZATION,

The following submission has been received in our office. You will be notified when it has been processed

Submission Reference No:	SR55831
Submission Type:	Certificate of Release Registration
Received Date:	6/7/2024 10:29:39 PM
Status:	Submitted
Status Date:	6/7/2024 10:29:39 PM

Thank you.

Bank Act Security Registry
Registre des garanties de la Loi sur les banques

Bonjour KC TESTING ORGANIZATION,

La soumission suivante a été reçue par notre bureau. Vous serez informé de son traitement.

Numéro de référence de la soumission:	SR55831
Type de soumission:	Certificate of Release Registration
Date de réception:	6/7/2024 10:29:39 PM
Statut:	Submitted
Date du statut:	6/7/2024 10:29:39 PM

Merci.

Registre des garanties de la Loi sur les banques
Bank Act Security Registry

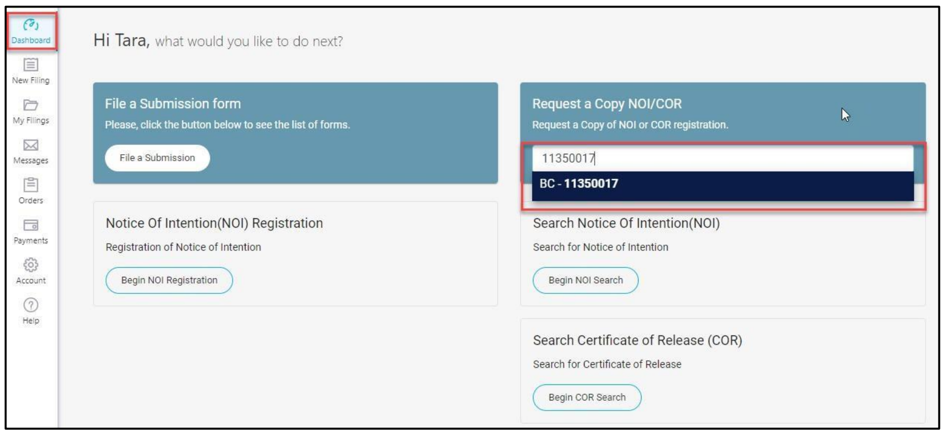
The service request is then sent to the central processing facility for processing.

Registration events must be manually examined by the Central Processing Facility. Once the registration is complete, the status will be updated in your **My Filings** tab in Customer Portal typically within one full business day. You will also receive notification in your **Messages** tab. See the General Navigation section of this guide for instructions to access these tabs.

Request for Copy

Request a Copy of Notice of Intention (NOI)

1. From the **Dashboard**, under **Request a Copy NOI/COR,** enter the NOI number in the search bar. Click on the number when it appears.



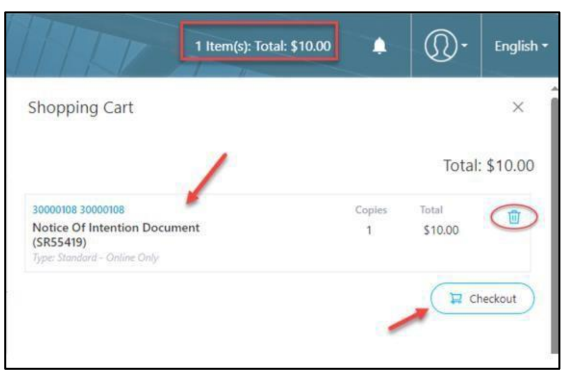
Note: When searching by Registration Number, there may be multiple results with the same number; however, each result will have a preceding Province of Registration indicator (e.g., SK, BC, etc.). Be sure to select the Registration number containing the applicable Province of Registration.

2. The **Notice of Intention Document** (SRxxxx) will be displayed. Click **Standard** beside the required document.

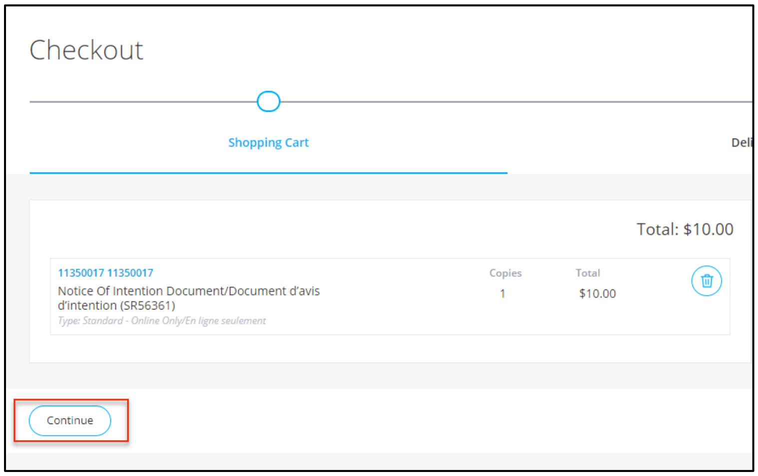
3. You are now presented with the full cost, which offers online only delivery. Click **Add to Cart.**

4. Your cart will appear in the top right of the screen.

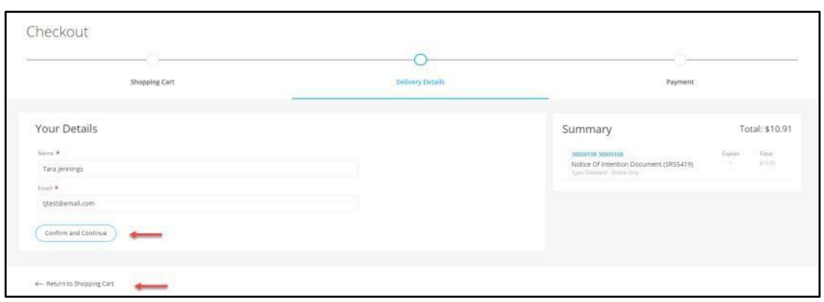
5. Click on your cart and the item(s) you ordered will be displayed. If correct, click **Checkout.** If your order is not correct, use the **trash can** icon to delete your order.



6. You are now on the **Shopping Cart** tab. Review your order. If correct, click **Continue.** If your order is not correct, use the **trash can** icon to delete your request.

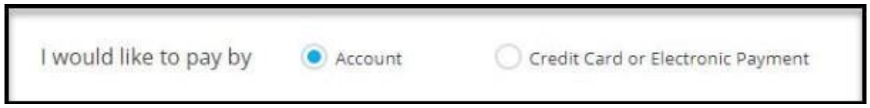


7. The **Delivery Details** tab appears; review all information. If not correct, you can **Return to Shopping Cart** to amend. If correct, click **Confirm and Continue**.



8. **Payment** if you have funds in your account, you will be prompted to choose your preferred payment method: Account or Credit Card. If your account does not have adequate funds, the only option will be Credit Card.

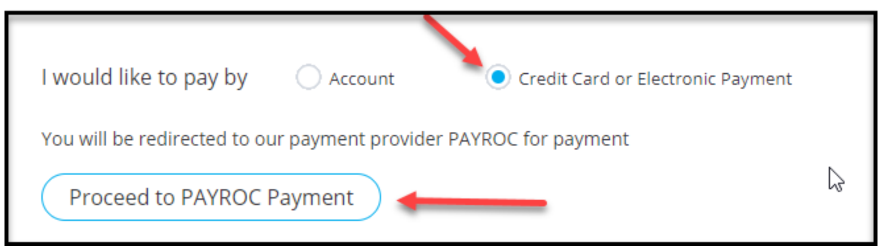
   Note: To pay by Debit or Pre-authorized Debit, select Credit Card.



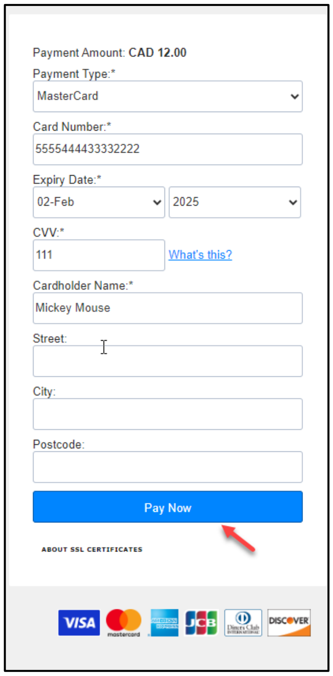
If you selected **Account**, review **Your Current Balance** and **Total Due** fields to ensure enough funds are available.

Once funds have been confirmed, click **Pay by Account**. Payment is automatically processed from funds in your account.

If you selected **Credit Card**, click **Proceed to PAYROC Payment.**



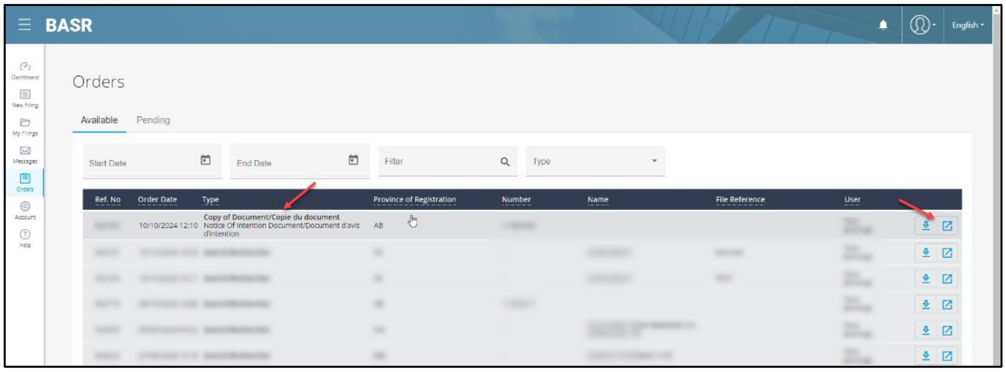
This will take you to the secure virtual terminal where you will enter your payment details and complete payment by clicking **Pay Now**.



9. Upon successful completion of the transaction **Thank you for your order** and **Payment Received** notices will appear. You will have the ability to download the receipt from this screen.

10. Go to **Orders** in the menu bar on left side of the screen. Your requested copy will appear here. On the right of your order, there are two icons – **Download** and **Open Details**

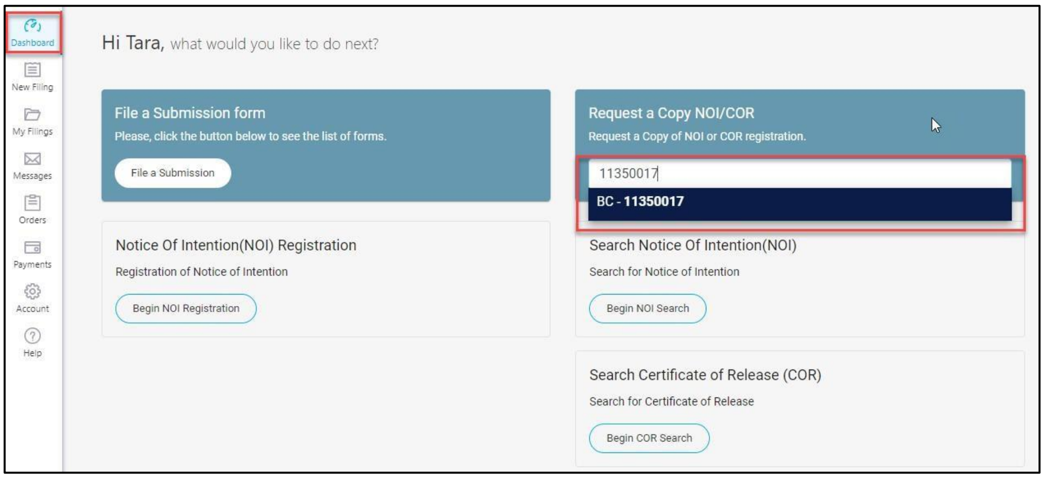
- **Download** opens a PDF version of the NOI document.
- **Open Details** provides the order details, the entity details, and the option to download a copy of your document.



Request Copy of Certificate of Release (COR)

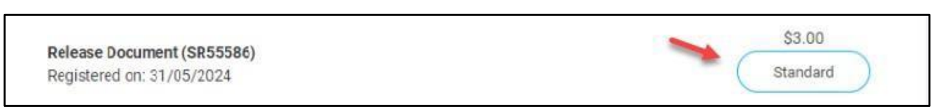
1. Select **Dashboard** from the menu on the left side of the screen.

2. In **Request a Copy NOI/COR** search field, enter the **COR Registration No**. in the search bar. Click on the number when it appears.



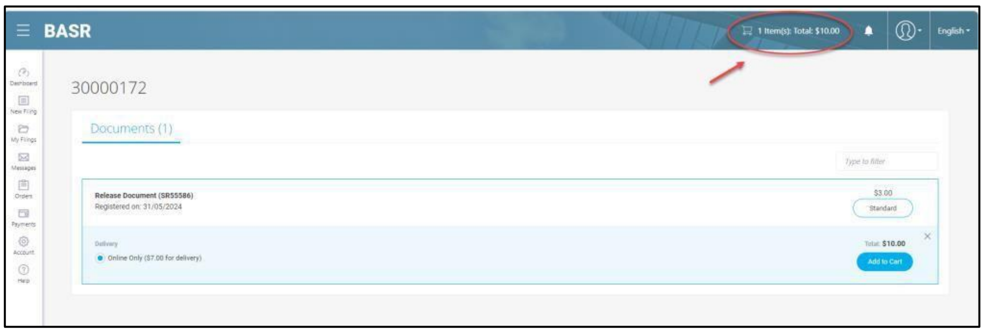
Note: When searching by Registration Number, there may be multiple results with the same number; however, each result will have a preceding Province of Registration indicator (e.g., SK, BC, etc.). Be sure to select the Registration number containing the applicable Province of Registration.

3. Click the **Standard** icon next to Release Document.

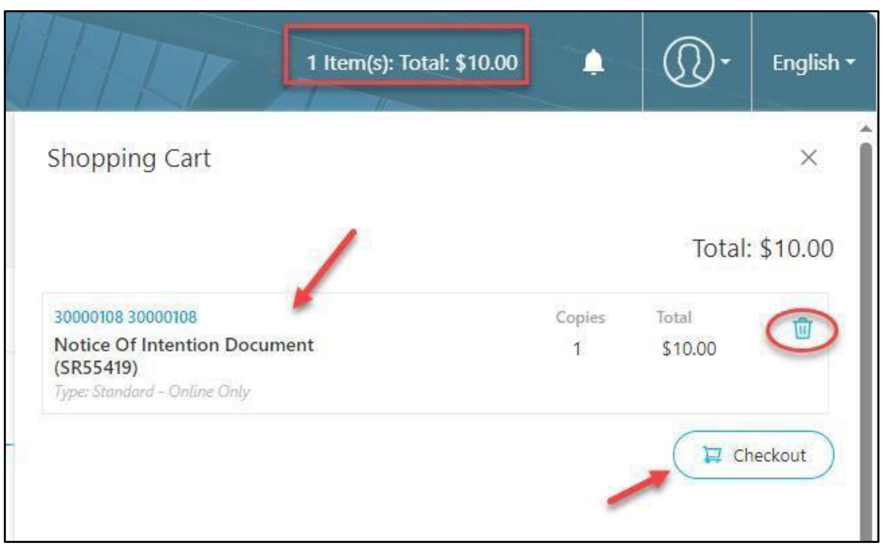


4. You are now presented with the full cost, which offers only online delivery. Click **Add to Cart.**

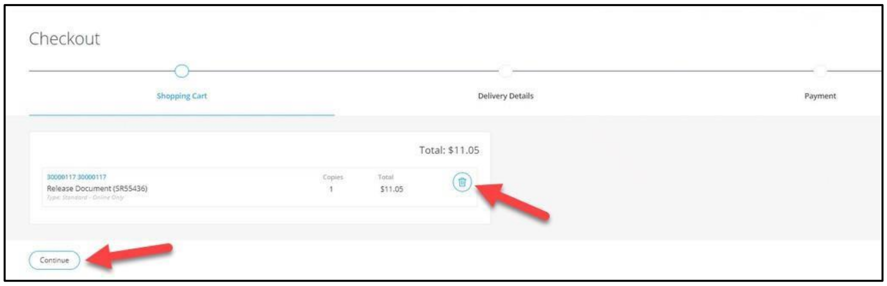
5. Your cart will appear in the top right of the screen.



6. Click on your cart and the item(s) you ordered will be displayed. If correct, Click **Checkout.** If your order is not correct, use the **trash can** icon to delete your order.



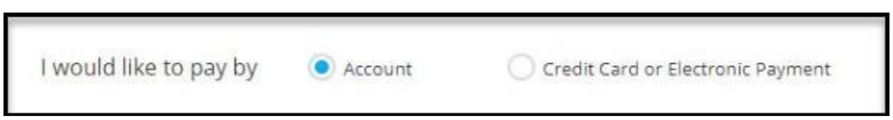
7. You are now on the **Shopping Cart** tab. Review your order. If correct, click **Continue.** If your order is not correct, you use the **trash can** icon to delete your request.



8. The **Delivery Details** tab appears; review all information. If not correct, you can **Return to Shopping Cart** to amend. If correct, click **Confirm and Continue**.

9. **Payment** if you have funds in your account, you will be prompted to choose your preferred payment method: Account or Credit Card. If your account does not have adequate funds, the only option will be Credit Card.

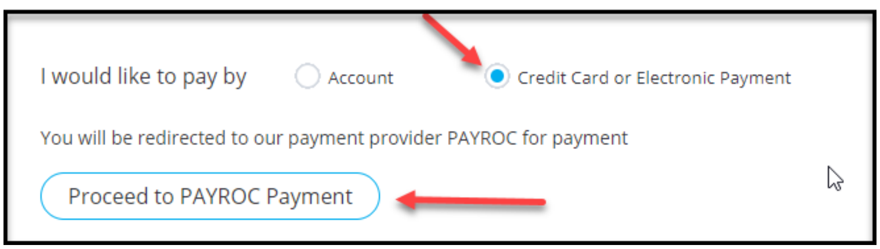
   Note: To pay by Debit or Pre-authorized Debit, select Credit Card.



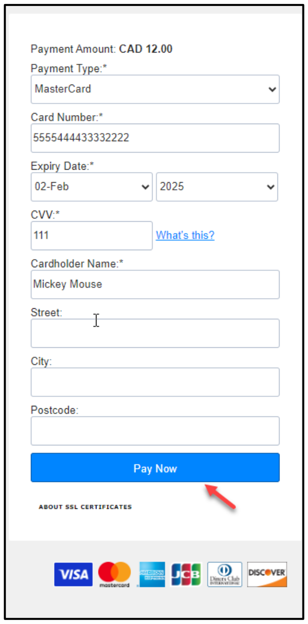
If you selected **Account**, review **Your Current Balance** and **Total Due** fields to ensure enough funds are available.

Once funds have been confirmed, Click **Pay by Account**. Payment is automatically processed from funds in your account.

If you selected **Credit Card**, click **Proceed to PAYROC Payment**.



This will take you to the virtual terminal where you will enter your payment details and complete payment by clicking **Pay Now**.



10. Upon successful completion of the transaction **Thank you for your order** and **Payment Received** notices will appear. You will have the ability to download the receipt from this screen.

BASR

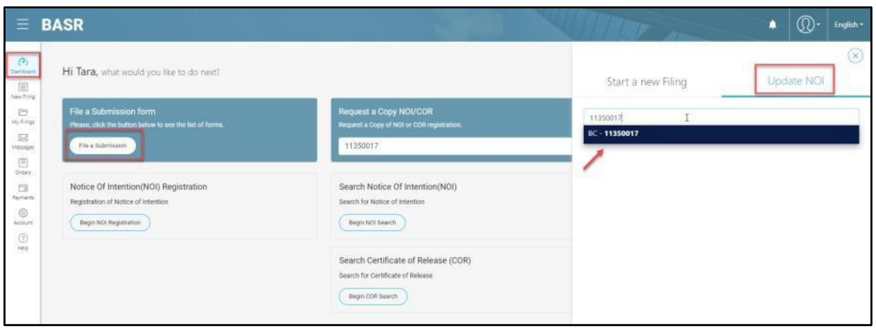
Amendments and Corrections

Amendment of a Notice of Intention (NOI)

1. From the Dashboard click on **File a Submission.**

2. Your options display to the right. Click on **Update NOI.**

3. Enter the NOI registration number in the **Lookup NOI** search bar. A list of NOIs will appear. Click on the appropriate NOI.

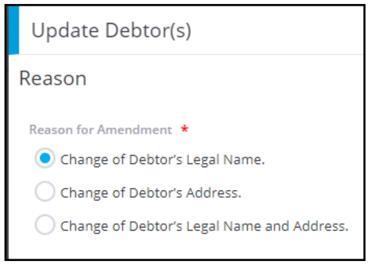


Note: When searching by Registration Number, there may be multiple results with the same number; however, each result will have a preceding Province of Registration indicator (e.g., SK, BC, etc.). Be sure to select the Registration number containing the applicable Province of Registration.

4. Click on the appropriate NOI.

5. Three options for what you can file on this NOI will appear; click **Start** beside the **Amendment of a Notice of Intention (NOI)**. The form will load.

6. The **Update Debtor(s)** screen appears; you must choose the **Reason** for amendment.

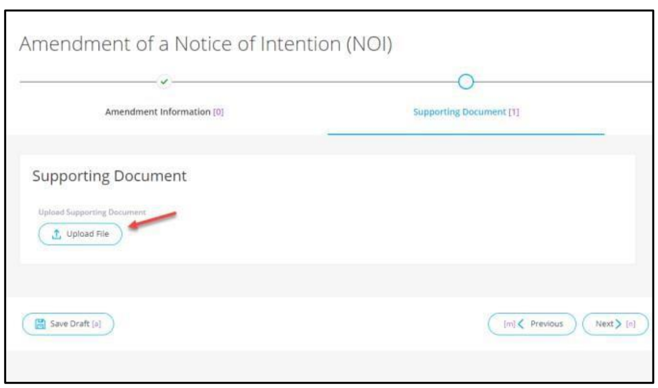


7. Select the pencil icon to make necessary changes (e.g., Change address, change name).

8. Click **Save** at the bottom of the screen**.**

9. This takes you back to the **Amendment of a Notice of Intention (NOI)** screen, click **Next.**

10. You <u>must</u> upload your supporting documentation. Select **Upload File** and attach the required document.



The following screen will appear and you either **Select a File** or **Drop one file here**.

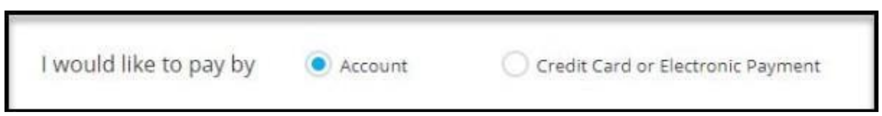
11. Click **Next.**

12. You are now on the **Review** screen; review the information you just amended. If any corrections are required, select the **Previous** button at the bottom of the screen to take you back to the amendment information tab.

13. If all is correct, you must check off the **Confirmation** Statement, and click **Submit.**

14. **Payment** if you have funds in your account, you will be prompted to choose your preferred payment method: Account or Credit Card. If your account does not have adequate funds, the only option will be Credit Card.

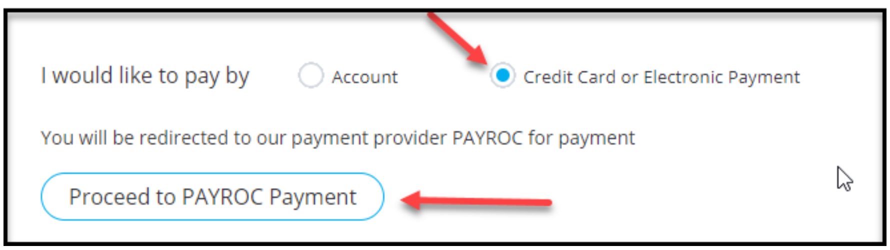
    Note: To pay by Debit or Pre-authorized Debit, select Credit Card.



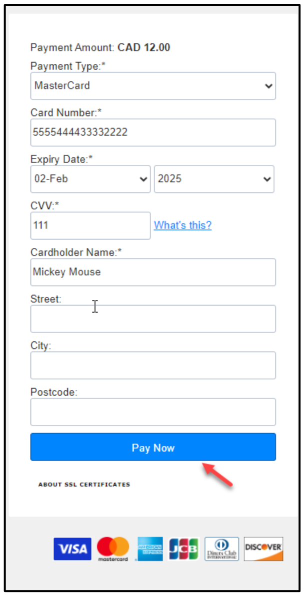
    If you selected **Account**, review **Your Current Balance** and **Total Due** fields to ensure enough funds are available.

Once funds have been confirmed, click **Pay by Account**. Payment is automatically processed from funds in your account.

If you selected **Credit Card**, click **Proceed to PAYROC payment.**



This will take you to the virtual terminal where you will enter your payment details and complete payment by clicking **Pay Now**.



15. Upon successful completion of the transaction, you will see a **Payment Received** and a **Submission Received** notice. This screen will provide you with your Filing Reference/Service Request (SR) number.

16. The service request is then sent to the Central Processing Facility (CPF) for processing. Once your request has been received, you will be sent a **Received Submission** confirmation email.

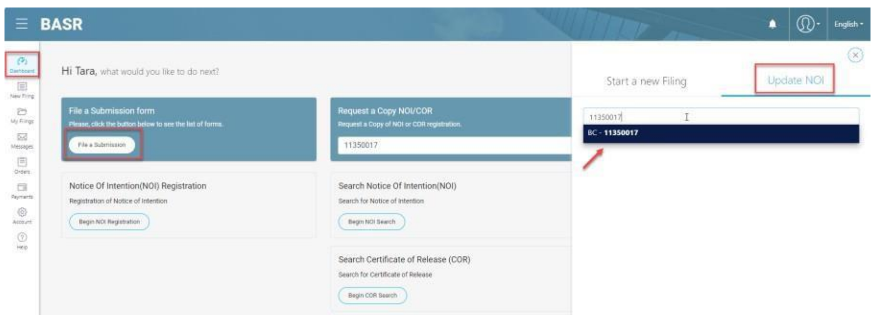
BASR

Error Correction for a Notice of Intention (NOI)

1. Select **New Filing** from the menu located on the left side of the screen.

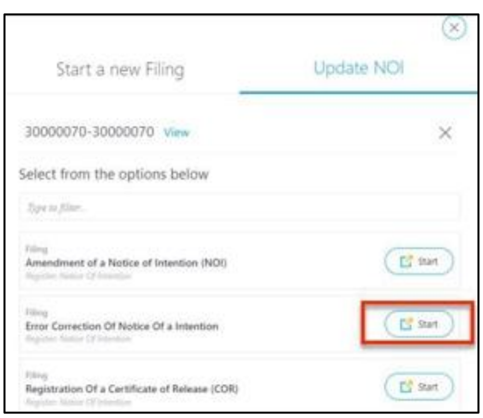
2. Select **Update NOI.**

3. Enter the NOI registration number in the **Lookup NOI** search bar. A list of NOIs will appear. Click on the appropriate NOI.

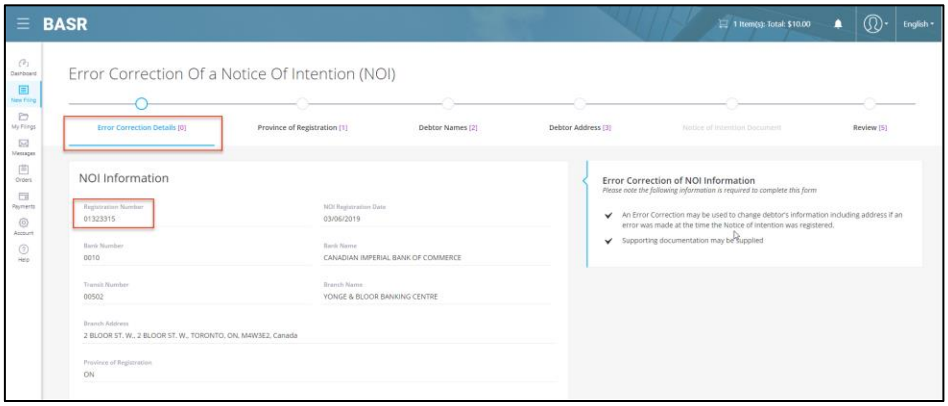


Note: When searching by Registration Number, there may be multiple results with the same number; however, each result will have a preceding Province of Registration indicator (e.g., SK, BC, etc.). Be sure to select the Registration number containing the applicable Province of Registration.

4. Three options will appear. Click **Start** beside **Error Correction of a Notice of Intention.**



5. On the **Error Correction Details** screen, ensure the registration number of NOI record is correct.

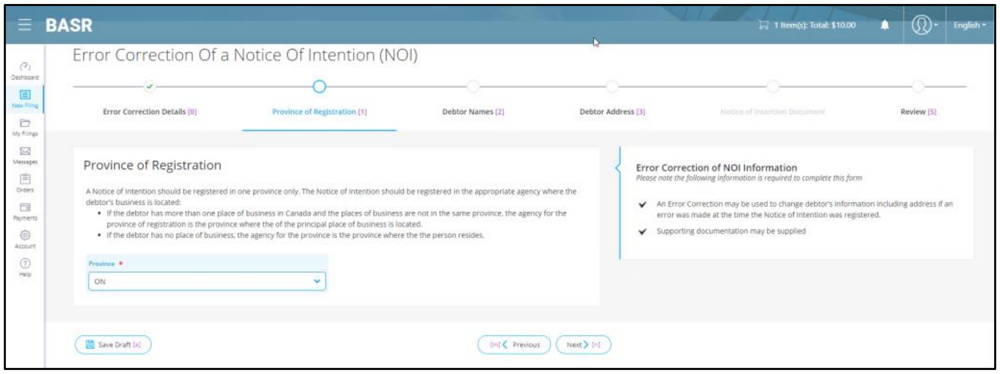


6. Select appropriate **Reason for requesting modification**.

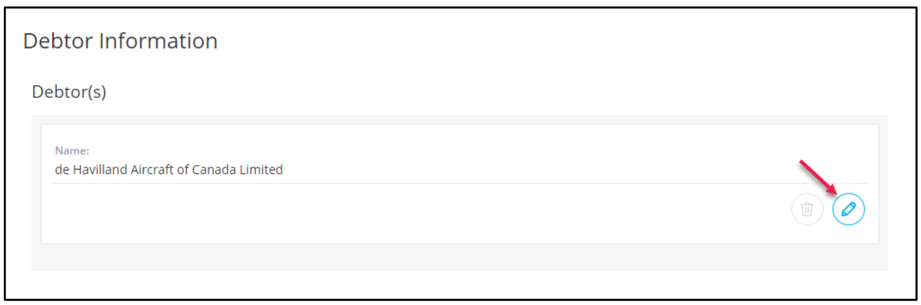
7. Provide detailed description of error in the associated text box.

8. Select **Next** on bottom right of the page. This takes you to the **Province of Registration** screen. Update the Province of Registration if required.

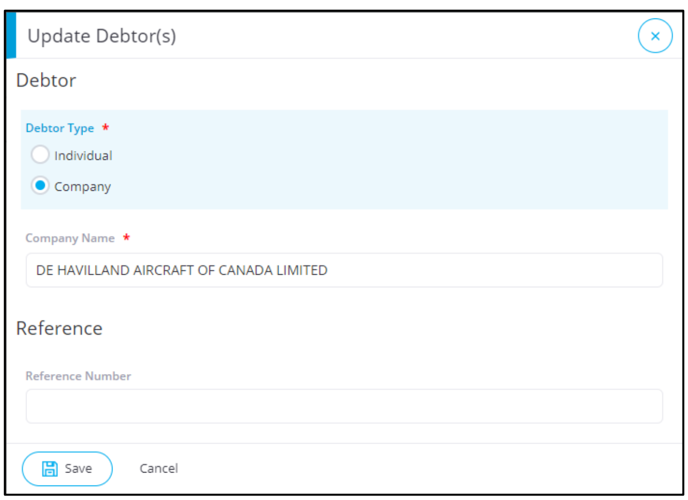
9. Click **Next**.



10. On the **Debtor Names** screen, select the **pencil** icon if making a correction to the Debtor name – whether Company or Individual.



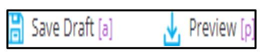
11. Make required correction(s) in the **Update Debtor(s)** window that pops up and click **Save**.



12. Click **Next**.

13. In the **Debtor Address** screen make any required correction(s) to the **Debtor Mailing Address**. Click **Next**.

14. You are now at the **Review** screen; review all information and make sure it is correct. You have the option to **Save as Draft** or **Preview** the Error Correction of a NOI document at the bottom of the screen.



When all information is deemed correct, you <u>must</u> check off the **Confirmation** statement located at the bottom of the screen. Click **Submit.**

15. You will see a **Submission Received** notice. This screen will provide you with your **Filing Reference/Service Request (SR) number**.

A notification will be sent once your submission is processed.

Annual Renewals

The renewal of Notice of Intention (NOI) service enables banks and federal credit unions to renew an existing NOI for a period of 1 to 5 years. Renewing an NOI extends the NOI expiry date while maintaining the original registration date in the registry. **Note**: use of the term "bank" represents both banks and federal credit unions.

The renewal service is an online-only service enabling banks to efficiently access their expiring NOIs and complete renewals.

Annual Renewal Forms

- **Retrieve List of Expiring NOIs** – allows banks to request a list of expiring NOIs which will be delivered to their Orders in the Customer Portal.
- **Renewal of Notice of Intention**– allows users to file renewals on an individual NOI record, accessible through the **Update an NOI** tab on the **New Filing** screen.
- **Multiple Renewals of Notices of Intention**– allows banks to file renewals on multiple Notice of Intention records in one submission.

Annual Renewal Timelines

- **Renewal of Notice of Intention (Single NOI)** will be available year-round and can be used to renew Notice of Intention records at any time, accommodating banks that have processes which involve reviews earlier in the Notice of Intention life cycle.
- The **Retrieve List of Expiring NOIs** and **Multiple Renewals of Notices of Intention** forms will <u>only</u> be available during the annual renewal window.

Annual Renewal (AR) Window

<table>
<tr><td>AR Window opens</td><td>Oct. 1</td><td>The Do Not Renew option is only available during the AR window</td></tr>
<tr><td>AR Advance Notice</td><td>Dec. 1</td><td>If Do Not Renew is selected before December 31 the NOI will automatically expire on December 31.</td></tr>
<tr><td>AR First Reminder</td><td>Feb.1</td><td rowspan="2">If Do Not Renew is selected between December 31 and March 31 the NOI will expire immediately.</td></tr>
<tr><td>AR Final Reminder</td><td>March 1</td></tr>
<tr><td>Renewal Deadline</td><td rowspan="2">March 31</td><td rowspan="2">If no action is taken the NOI will automatically expire on March 31.</td></tr>
<tr><td>AR Window closes</td></tr>
</table>

Retrieve Expiring Notice of Intention (NOI)

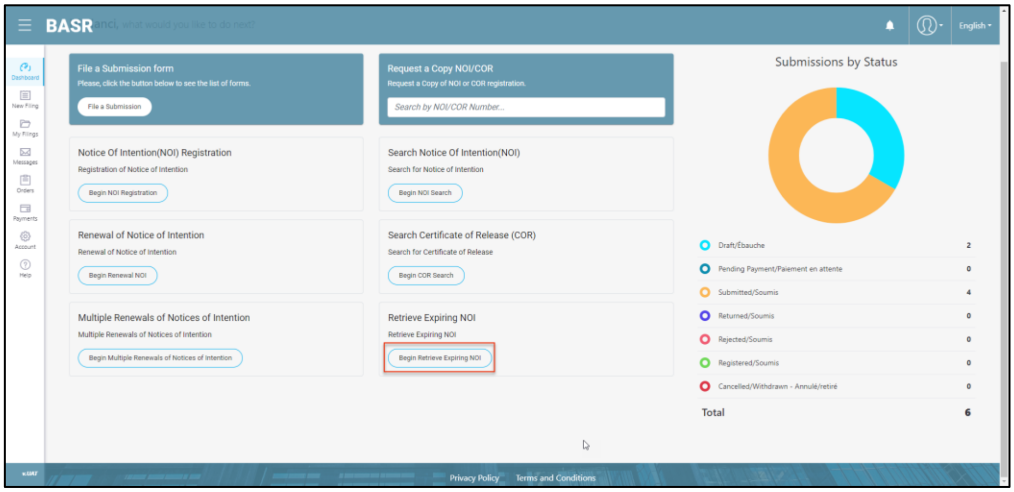
- Banks will have the ability to retrieve a list of their institution’s expiring NOIs for the applicable renewal period. E.g., in 2024, banks will be able to retrieve a list of all NOIs for their institution with an expiry date of Dec. 31, 2024.
- The NOI retrieval service will be available annually between Oct.1 and March 31 (e.g. Oct. 1, 2025 and March 31, 2026).
- Access to the retrieval service will be enabled for banks and federal credit unions.

Important Note: Account administrators must add the **Annual Renewal** privilege to users within their organization who require access to this service. See the **Managing Users (Organizational Accounts)** section for instructions.

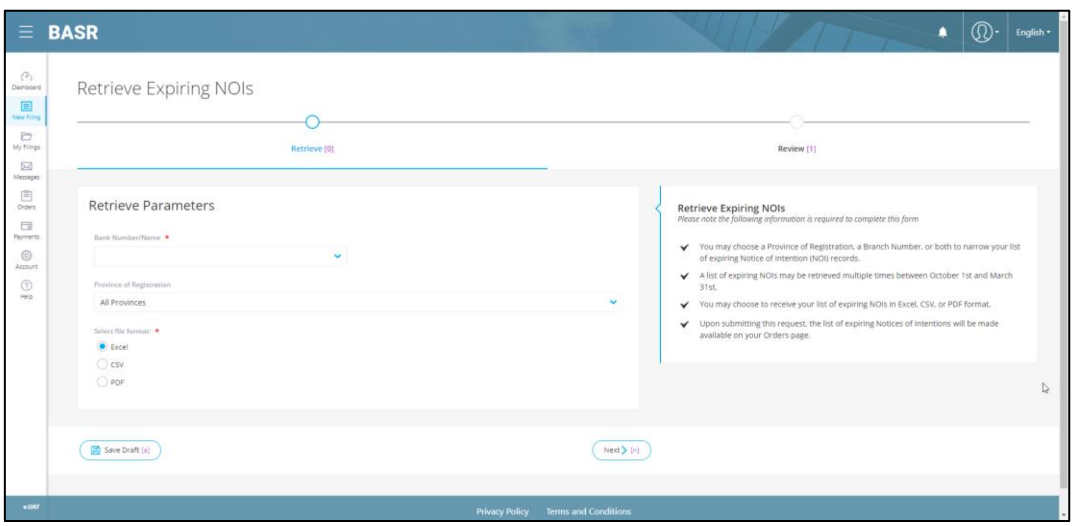
Steps to Retrieve Expiring NOI:

1. From your Dashboard click on **Begin Retrieve Expiring NOI**.

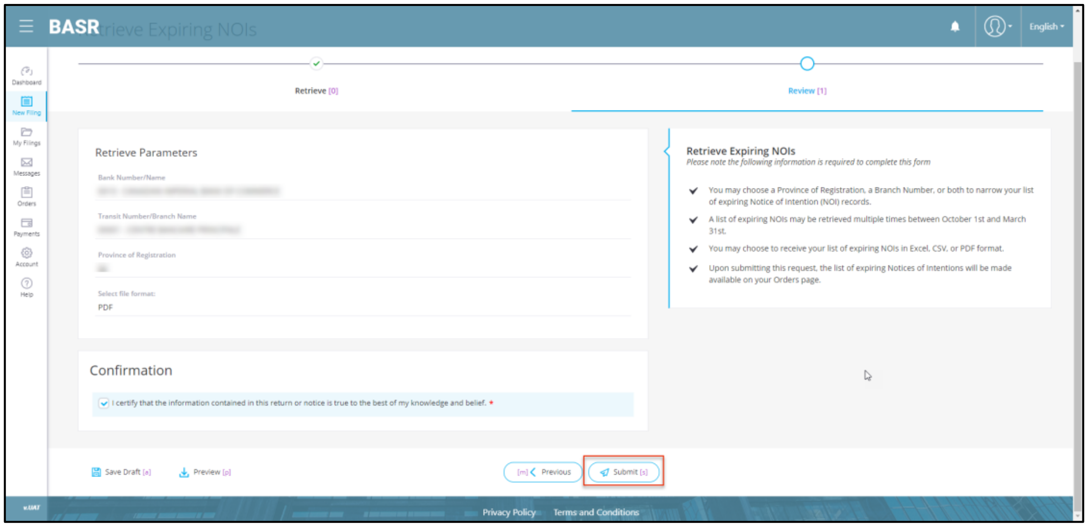
Note: you can also select **New Filing** from the menu on the left side of your screen to access **Retrieve Expiring NOIs**.



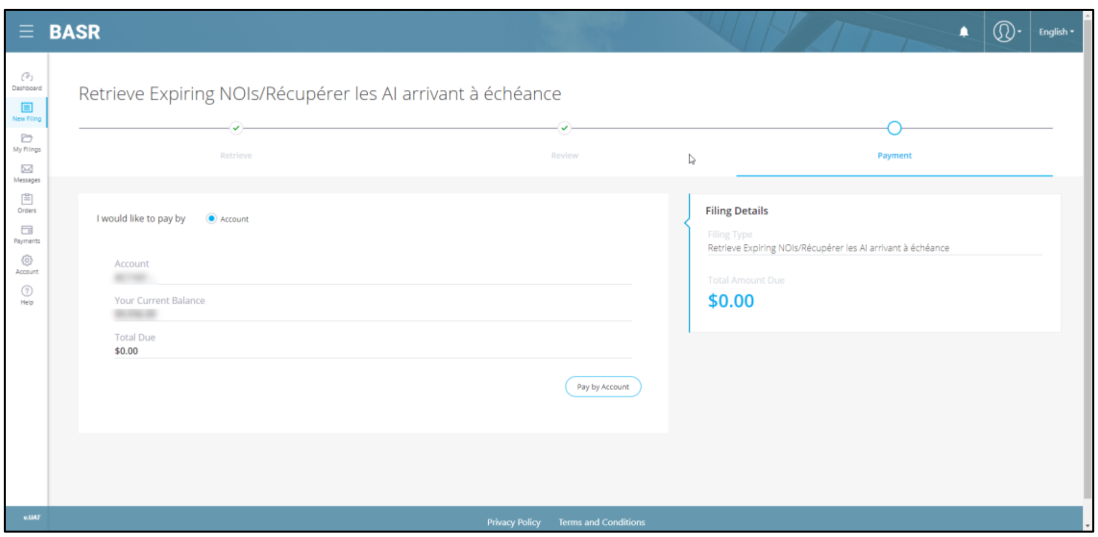
2. Under **Retrieve Parameters**, select **Bank Number/Name, Province of Registration** (All Provinces or one at a time) and preferred file format (Excel, CSV, or PDF). **Note**: Fields with a red asterisk (*) are required. In the **Province of Registration** field select All Provinces or select one province at a time.



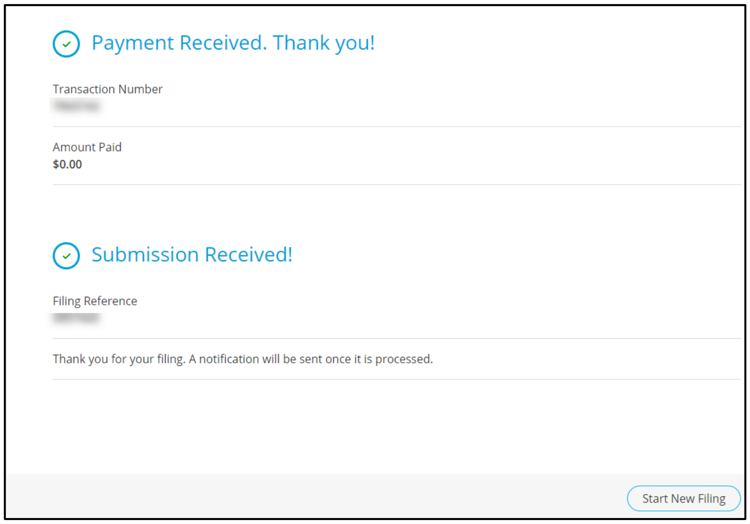
3. Click **Next**.
4. Review **Retrieve Parameters**. If correct, check off the **Confirmation** statement and click **Submit**. If information is incorrect, click on **Previous** and amend parameters.



5. The payment screen displays. **Total Due is $0.00.** There is no fee for this service and your account will not be charged; however, the system requires customers to submit as if there is a fee being charged. The system defaults to the **Pay By Account** option. Select **Pay by Account** to proceed.

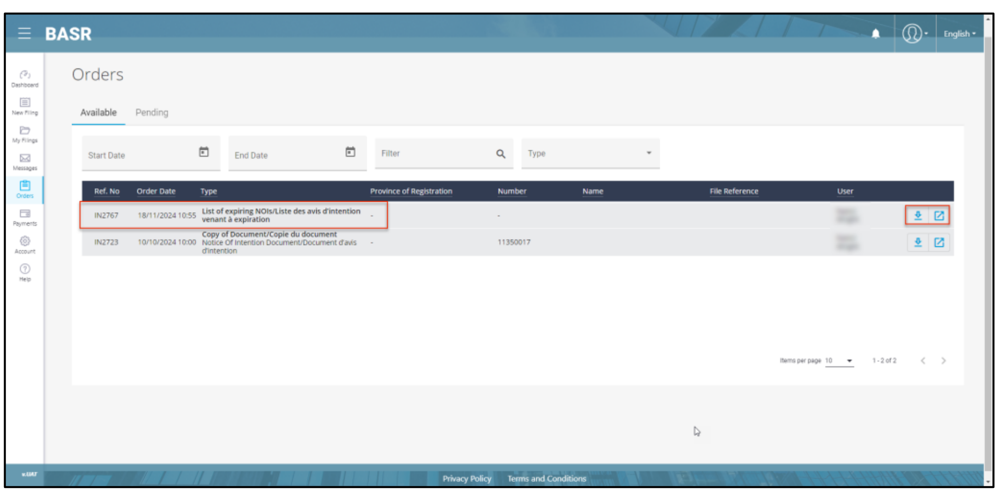


6. **Payment** and **Submission** confirmations display.



7. The list of expiring NOIs will appear in your **Orders**. From here you can download or open the list. On the right of your order, there are two icons – **Download** and **Open Details**

   i. **Download** opens a PDF version of the NOI document.
   ii. **Open Details** provides the order details, the entity details, and the option to download a copy of your document.



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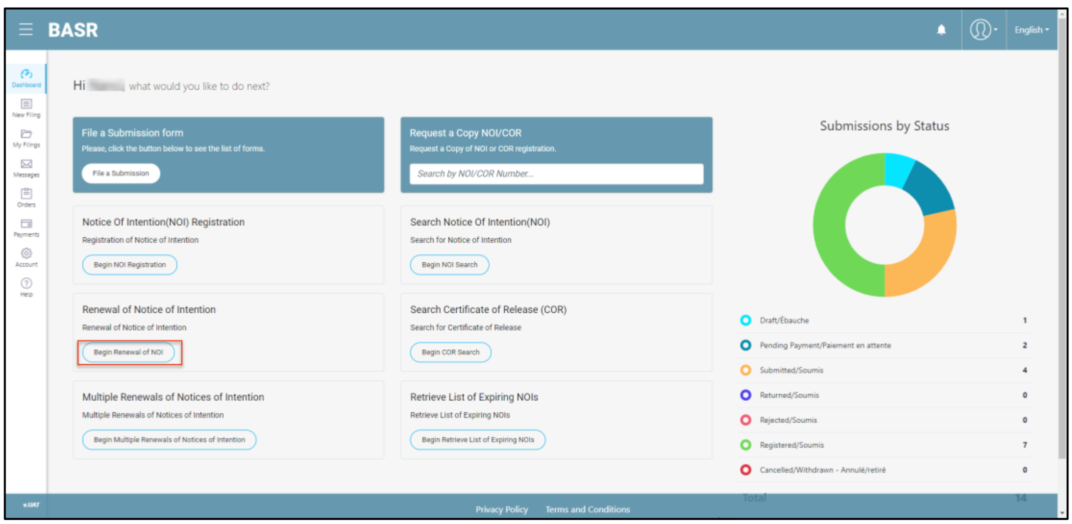
Renewal of Notice of Intention (Single NOI)

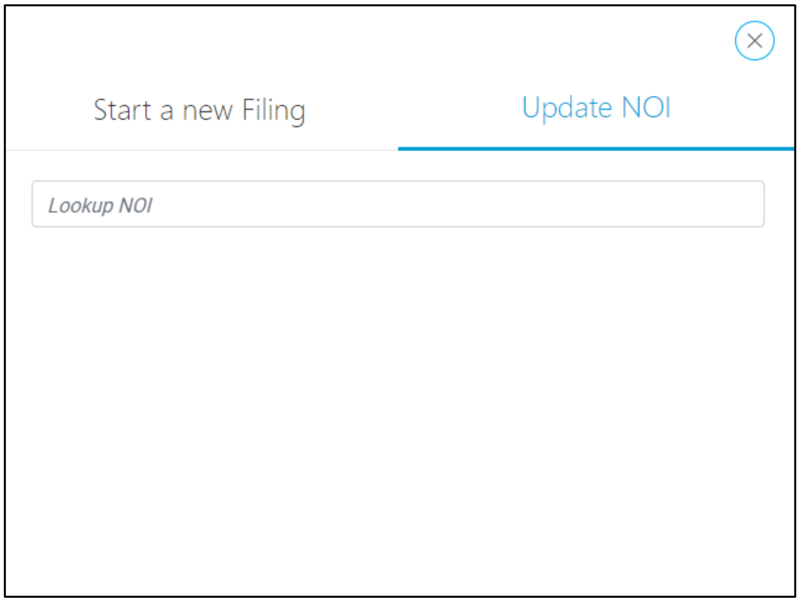
- The Renewal of Notice of Intention (Single NOI) renewal form allows users to complete renewal of an active NOI record.
- The service is available year-round and enables the renewal of an NOI prior to the expiry year.
- The single NOI renewal may be accessed by banks and service providers.

Steps to submit a Renewal of Notice of Intention:

1. From your dashboard, select **Begin Renewal of NOI.**



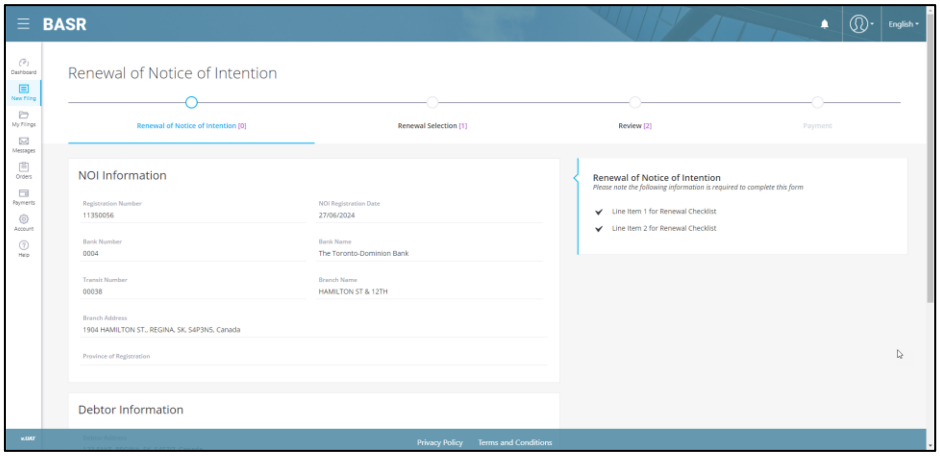
2. Under **Update NOI**, enter the NOI number in the **Lookup NOI** field.



3. Select **Start** beside **Renewal of Notice of Intention**.

4. Verify that the correct NOI is displayed on the **Renewal of Notice of Intention** screen.

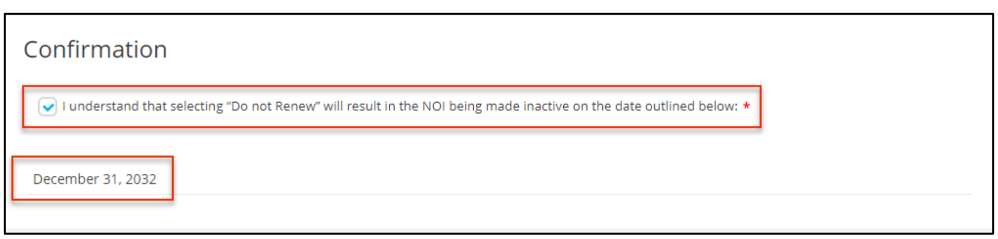
5. Click **Next**.



6. The **Renewal of Notice of Intention** screen displays.
   a. To renew the NOI, click the radio button next to **Renew** and select the number of years you wish to renew the NOI from the **Number of years to renew** dropdown menu (maximum of 5 years). The **New Expiry Date** will display.

      OR

   b. If you do not wish to renew the NOI, click the radio button next to **Do Not Renew**. If you select this option, you will need to review and complete the **Confirmation**.



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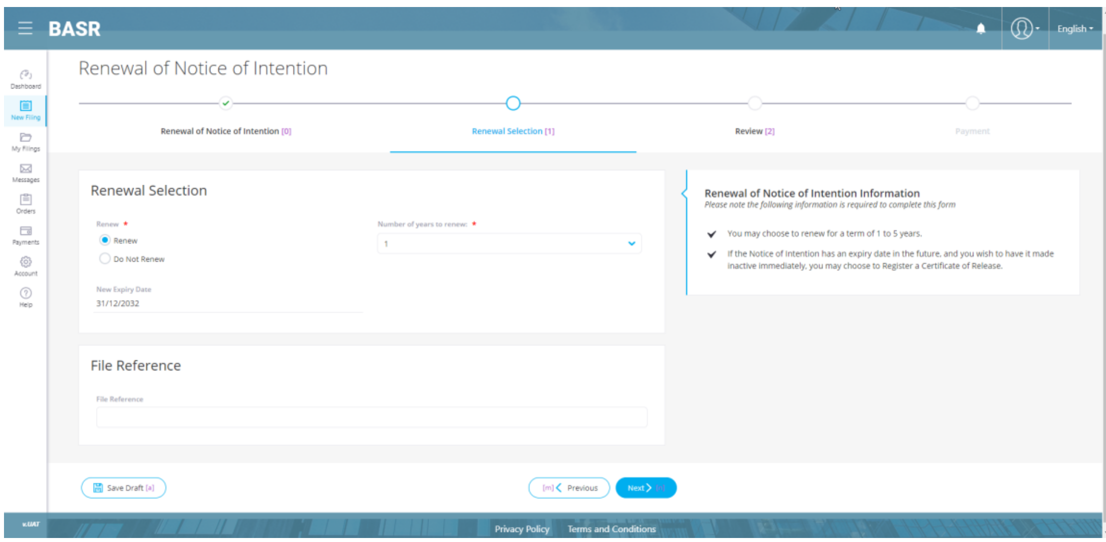
7. Enter the **File Reference** if applicable. **Note**: This field is optional and allows entry of customer file details/account information. The **File Reference** will display in Search results; however, you cannot search an NOI or COR using the **File Reference**. The **File Reference** will also be displayed in the **My Filings**, **Orders**, and **Payments** tabs.

8. Click **Next**.



9. The **Review** screen displays.

10. Verify that the correct NOI is displayed on the **Renewal of Notice of Intention** screen.

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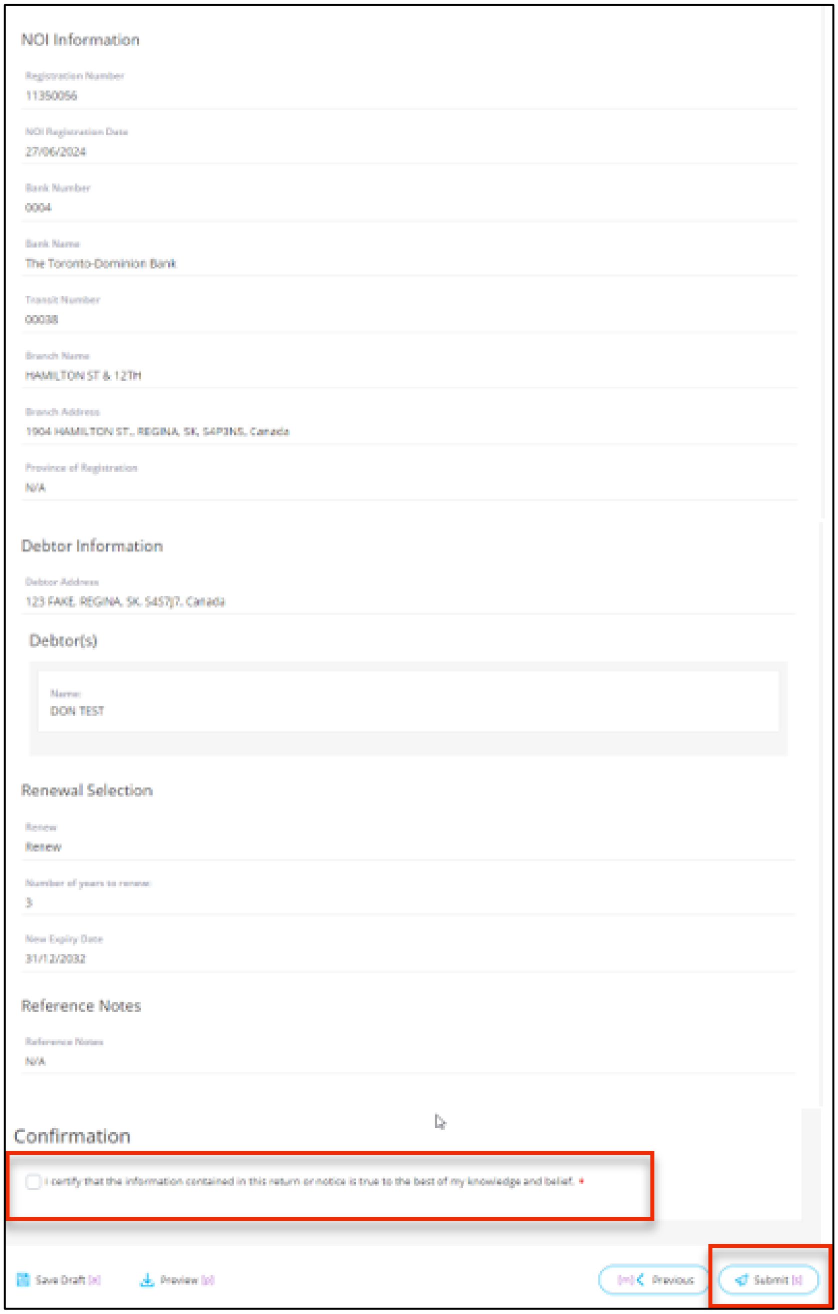
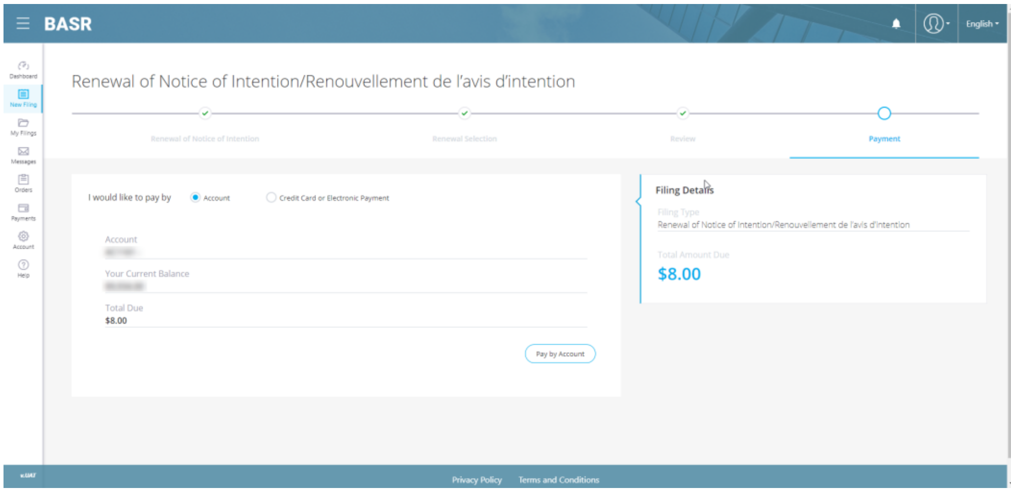


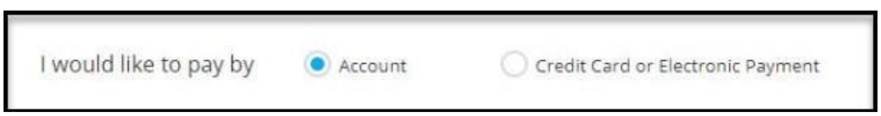
NOI Information
Registration Number
11350056
NOI Registration Date
27/06/2024
Bank Number
0004
Bank Name
The Toronto-Dominion Bank
Transit Number
00038
Branch Name
HAMILTON ST & 12TH
Branch Address
1904 HAMILTON ST., REGINA, SK, S4P3N5, Canada
Province of Registration
N/A
Debtor Information
Debtor Address
123 FAKE, REGINA, SK, S4S7J7, Canada
Debtor(s)
Name:
DON TEST
Renewal Selection
Renew
Renew
Number of years to renew:
3
New Expiry Date
31/12/2032
Reference Notes
Reference Notes
N/A
Confirmation
I certify that the information contained in this return or notice is true to the best of my knowledge and belief. *
Save Draft
Preview
Previous
Submit

11. This takes you to the payment screen.



12. If you have funds in your account, you will be prompted to choose your preferred payment method: **Account** or **Credit Card/Electronic Payment**. If your account does not have adequate funds, the only option will be Credit Card.

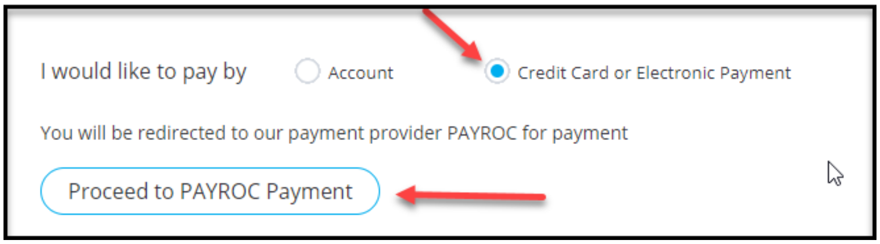
Note: To pay by Debit or Pre-authorized Debit, select **Credit Card or Electronic Payment**.



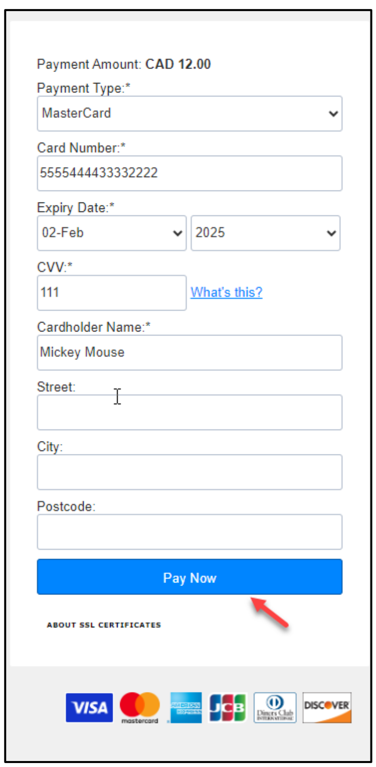
If you selected **Account**, review **Your Current Balance** and **Total Due** fields to ensure enough funds are available.

Once funds have been confirmed, Click **Pay by Account**. Payment is automatically processed from funds in your account.

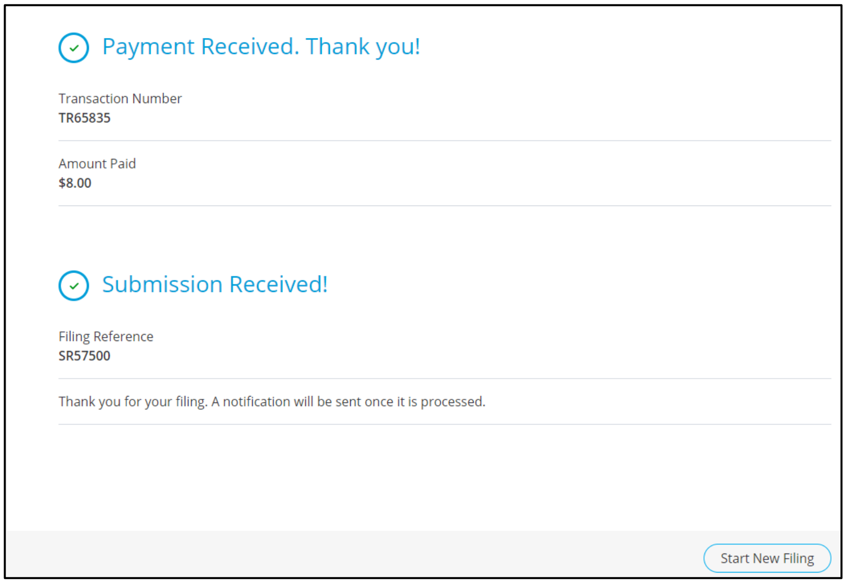
If you selected **Credit Card**, click **Proceed to PAYROC Payment.**



This will take you to the secure virtual terminal where you will enter your payment details and complete payment by clicking **Pay Now**.



13. Upon successful completion of the transaction, you will see a **Payment Received** and a **Submission Received** notice. This screen will provide you with your **Filing Reference/Service Request (SR)** number.



Once the submission is complete, the status will be updated in your **My Filings** tab in Customer Portal. You will also receive notification in your **Messages** tab. See the **General Navigation** section of this guide for instructions to access these tabs.

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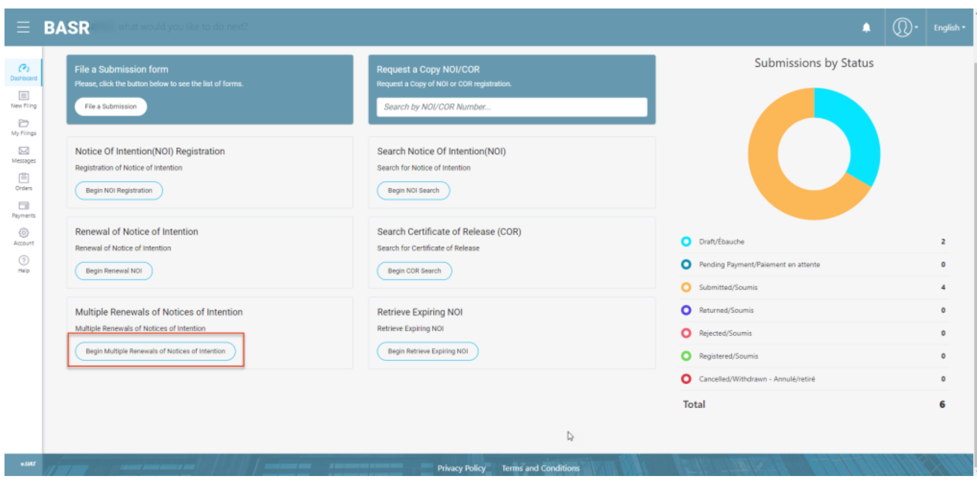
Multiple Renewals of Notices of Intention

- The multiple renewal form allows banks to complete renewal of multiple NOI records for their institution in one session.
- The Multiple NOI renewal will be available annually, between Oct. 1 and March 31 (e.g. Oct.1, 2025 and March 31, 2026).

Steps:

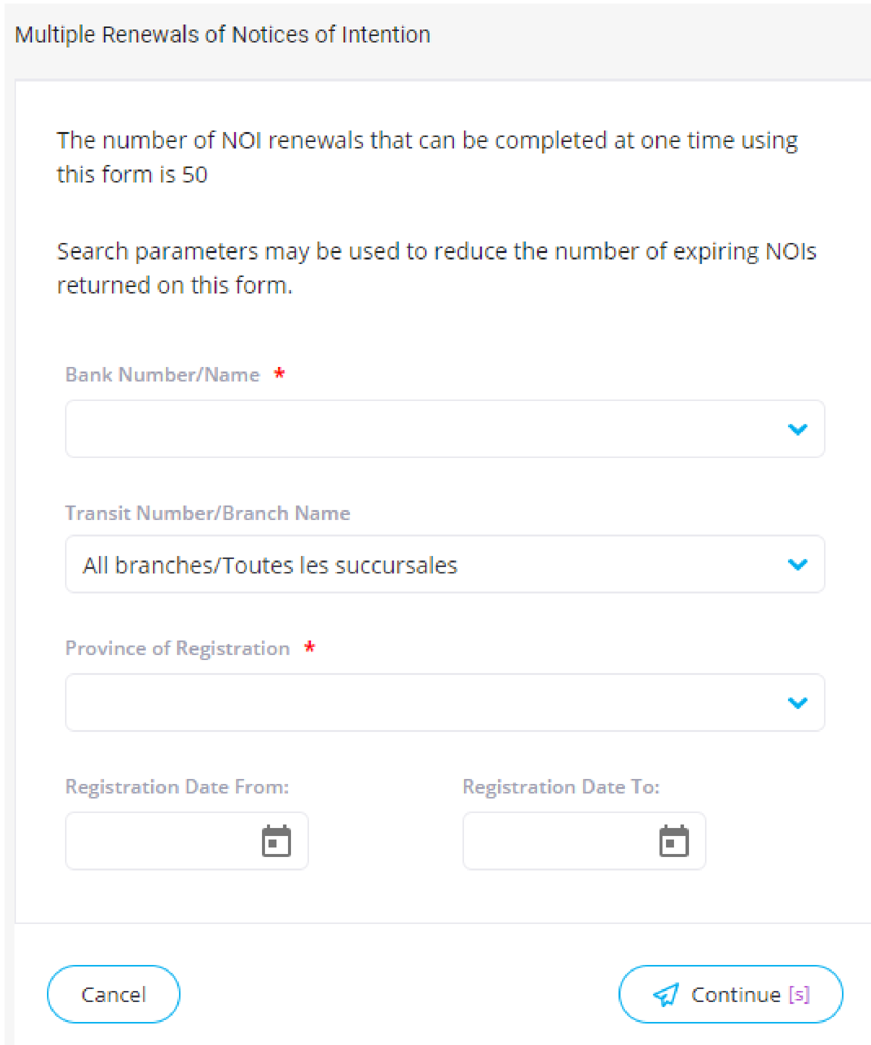
1. Select **Begin Multiple Renewals of Notices of Intention.**



2. Select the **Bank Number/Name** from the dropdown menu. **Note**: fields with a red asterisk (*) are required fields.

3. You may select a specific **Transit Number/Branch Name** from that dropdown menu, or you may leave it at the default setting of **All Branches**.

4. Select the **Province of Registration** from the dropdown menu.



5. If desired, you may use the date fields to help refine search results. Click on the **Calendar** icons in the **Registration Date From** and **Registration Date To** fields to select the date parameters.

6. When all search parameters have been entered, click **Continue**.

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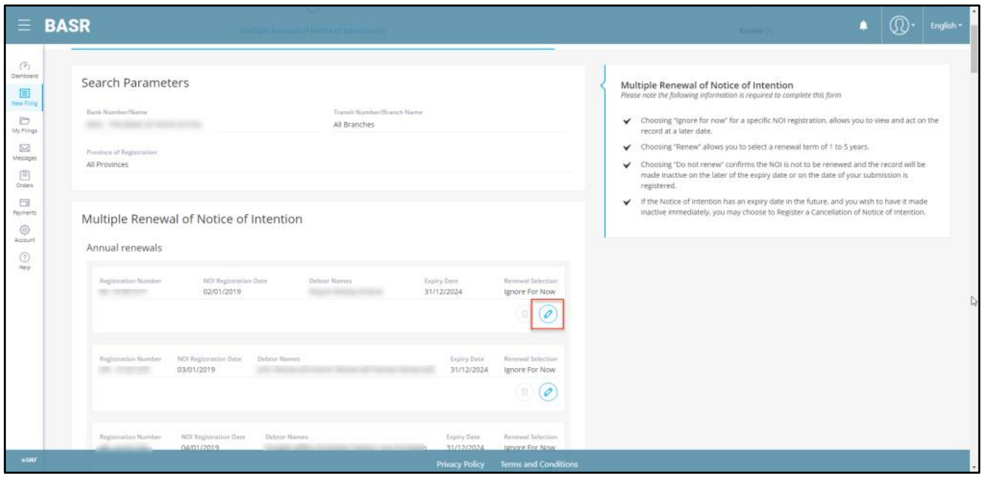
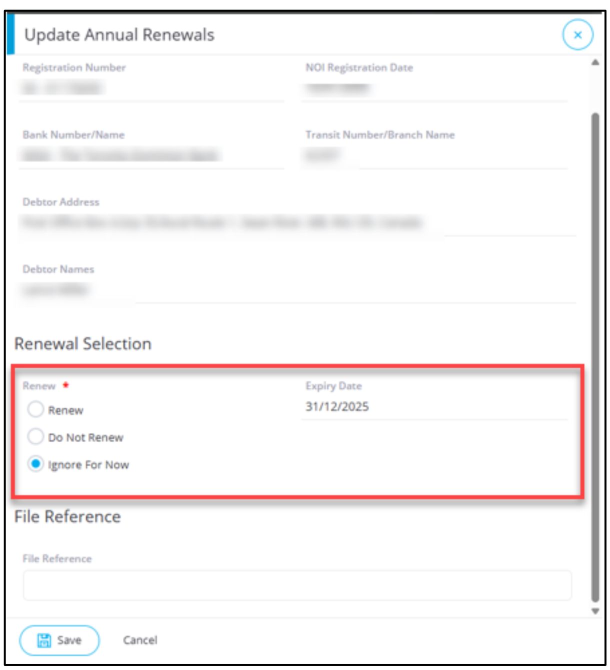
7. The **Multiple Renewals of Notice of Intention - Annual Renewals** listing displays.

8. Click on the **Pencil** icon to edit the **Renewal Selection** for each Annual renewal in the list.



9. The **Update Annual Renewals** window opens.



10. In the **Renewal Selection** section, select the applicable radio button (**Renew**, **Do Not Renew**, or **Ignore For Now**).

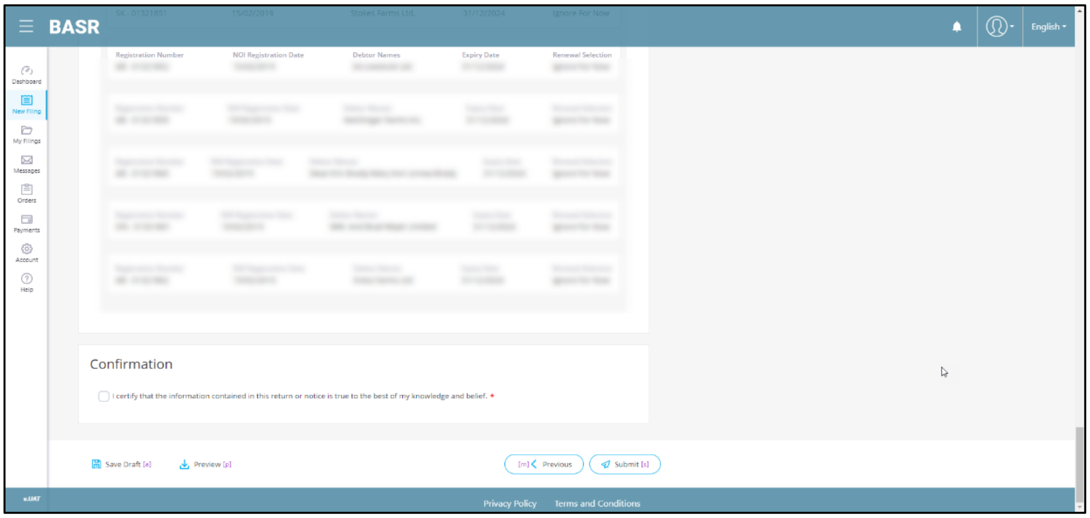
    a. Selecting **Renew** allows you to select a renewal term between 1 and 5 years.
    b. Selecting **Do Not Renew** confirms the NOI is not to be renewed and the record will be made inactive. **Note**: if **Do Not Renew** is selected on an NOI, the record will become inactive/expired in the registry on either the expiry date or the date the renewal submission is registered, whichever is later.
    c. Selecting **Ignore for Now** for a specific NOI registration allows you to view and act on the registration at a later date. **Note**: if no action is taken to renew or confirm non-renewal, the NOI will automatically be made inactive/expired at end of day on March 31 and it will no longer be available for search.

11. Enter the **File Reference** if applicable. **Note**: This field is optional and allows entry of customer file details/account information. The **File Reference** will display in Search results; however, you cannot search an NOI or COR using the **File Reference**. The **File Reference** will also be displayed in the **My Filings**, **Orders**, and **Payments** tabs.

12. Click **Save**. This brings you back to the list of expiring NOI's where you can edit the next annual renewal. Repeat steps 10 through 12 until all renewals are complete.

13. Once all annual renewals have been edited, click **Next** at the bottom of the screen to move to the **Review** section.

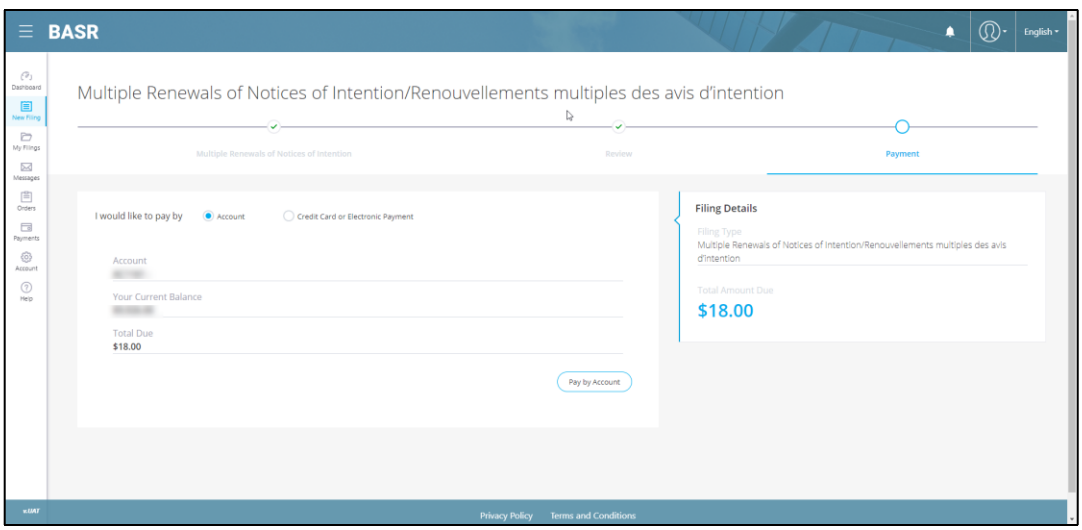
14. Review all annual renewals.



15. If there are any errors, click **Previous** to go back and edit as needed.

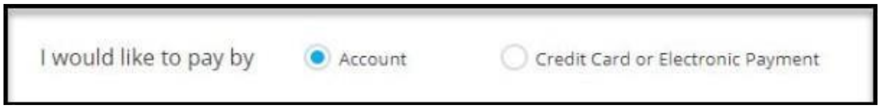
16. Once review is complete and all information entered has been verified, complete the **Confirmation** by selecting the checkbox and click on **Submit** to submit the Annual Renewals.

17. This takes you to the payment screen.

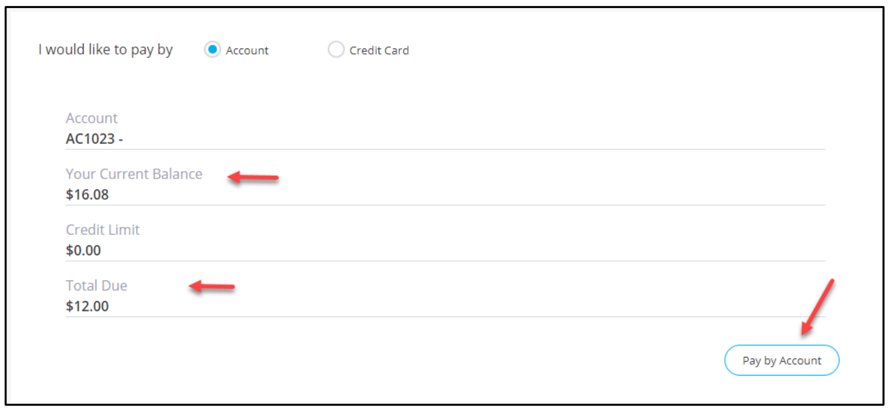


18. If you have funds in your account, you will be prompted to choose your preferred payment method: **Account** or **Credit Card**. If your account does not have adequate funds, the only option will be **Credit Card**.

Note: To pay by Debit or Pre-authorized Debit, select **Credit Card**.

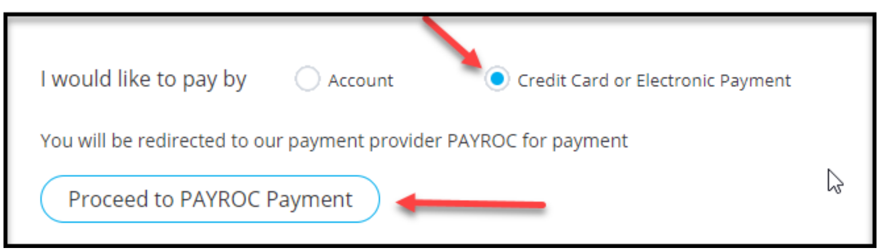


If you selected **Account**, review **Your Current Balance** and **Total Due** fields to ensure enough funds are available.

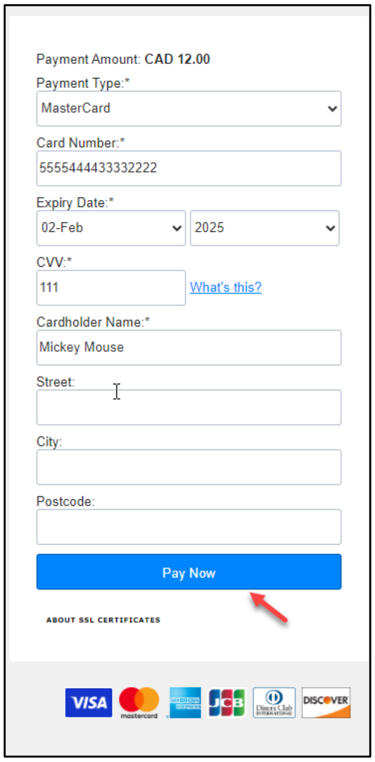


Once funds have been confirmed, click **Pay by Account**. Payment is automatically processed from funds in your account.

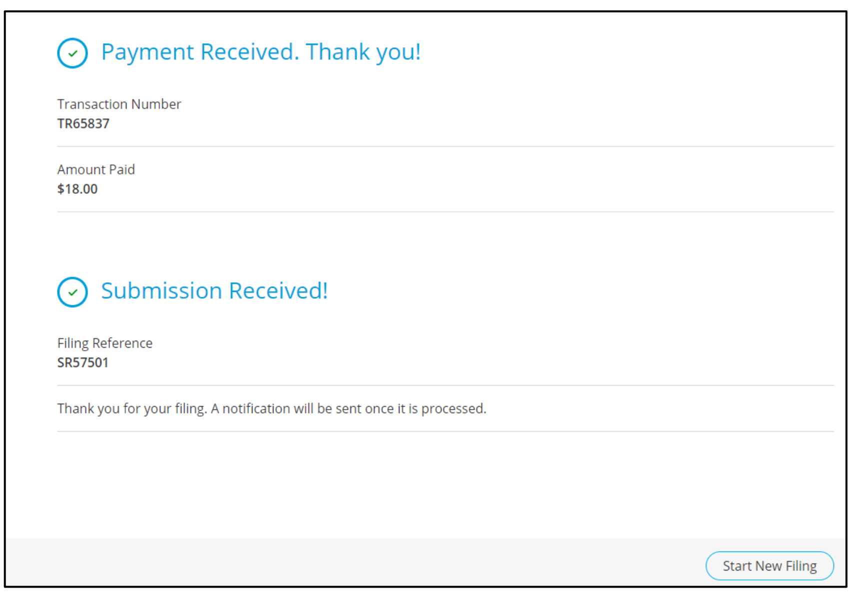
If you selected **Credit Card**, click **Proceed to PAYROC Payment.**



This will take you to the secure virtual terminal where you will enter your payment details and complete payment by clicking **Pay Now**.



19. Upon successful completion of the transaction, you will see a **Payment Received** and a **Submission Received** notice. This screen will provide you with your **Filing Reference/Service Request (SR)** number.



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Once the submission is complete, the status will be updated in your **My Filings** tab in Customer Portal. You will also receive notification in your **Messages** tab. See the **General Navigation** section of this guide for instructions to access these tabs.

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Clear Cache Process

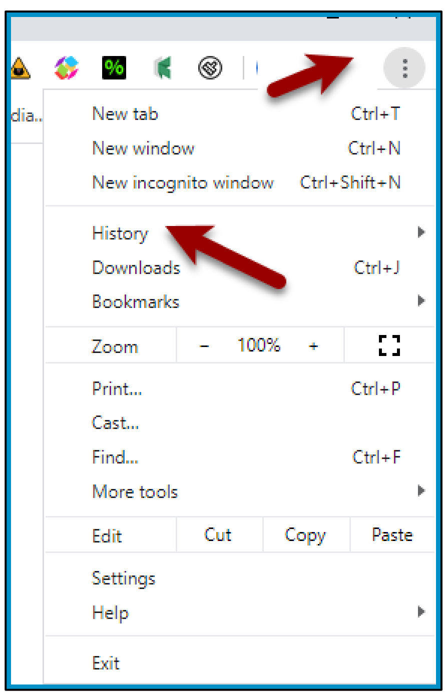
These instructions should be referred to if the Customer Portal application is not operating as outlined in the guide. If these instructions do not resolve the issue, contact customer support.

Google Chrome

Clearing your browser cache is often the easiest way to fix connection issues with library databases.

To clear your cache in Google Chrome:

1. Ensure you only have one Chrome browser window open (if you have multiple browsers open you must close all but one of them).
2. Click **the Menu in** the upper right.
3. Choose **History.**



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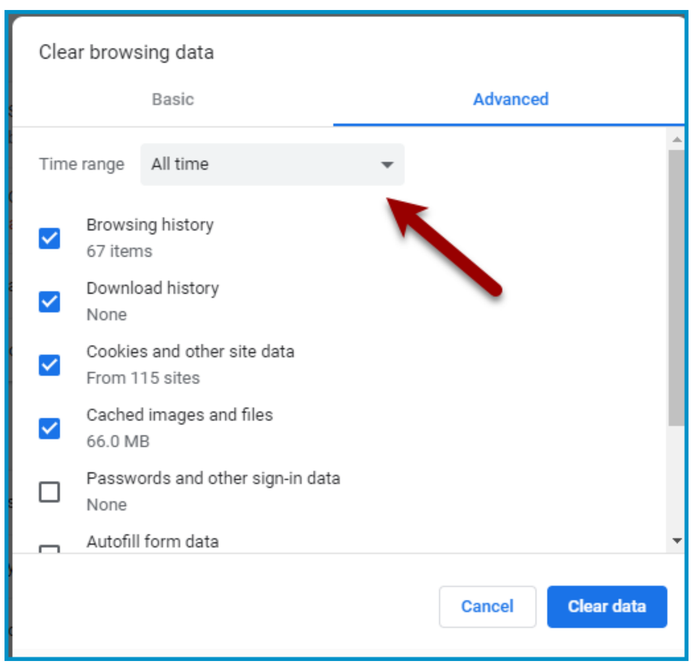
4. Choose **Clear Browsing Data**.

5. The most effective setting is to clear all browsing history for **All time** and to clear browsing history, download history, cached images and files, and cookies.



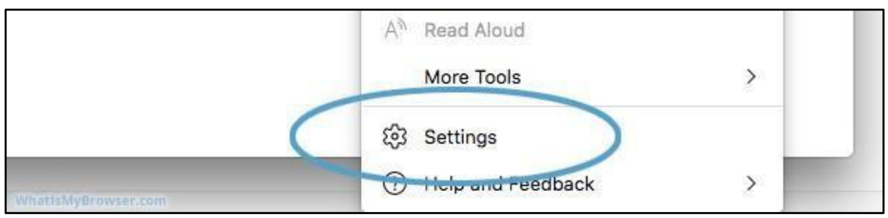
6. Close your browser and restart to see changes.

Microsoft Edge

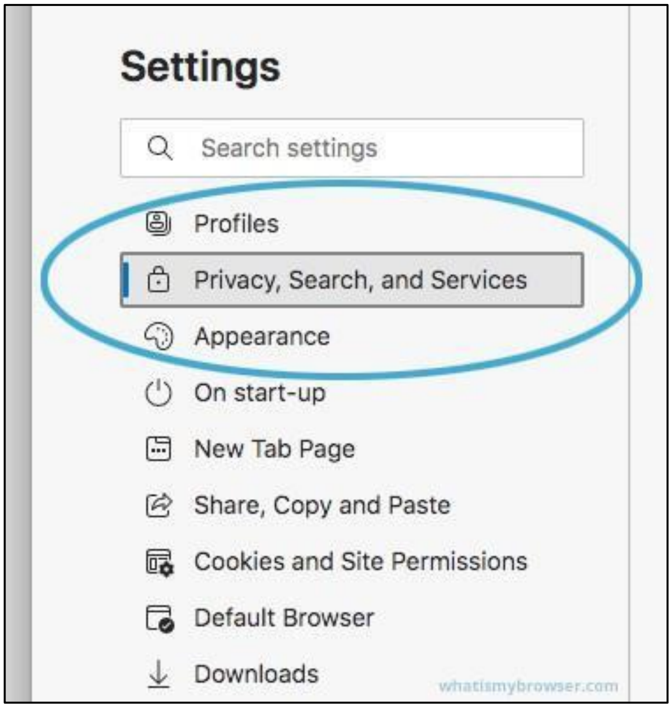
1. Ensure you only have one Edge browser window open (if you have multiple browsers open you must close all but one of them).

2. In the top right-hand corner of your Edge browser's window, you will see a small button with 3 dots (ellipsis) in it. This is the **Settings and more** button.

3. Select the **Settings** menu item

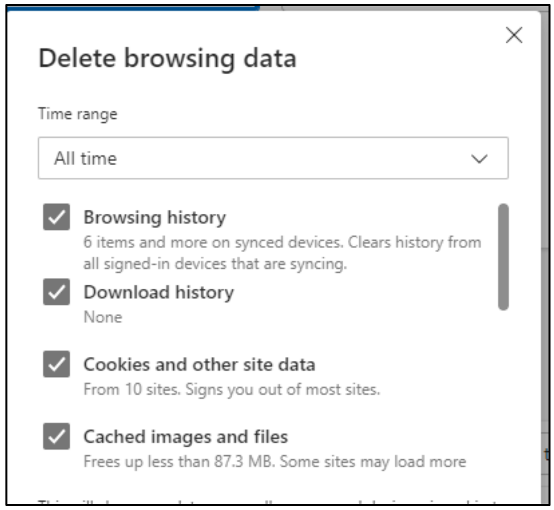


4. Click on the **Privacy, Search, and Services** on the left-hand side of the screen.



5. Click on the **Choose What to Clear** button

6. The most effective setting is to clear all browsing history for All time.



7. Click the **Clear now** button.

8. Once it's finished, the dialog window will close.

9. Close the edge browser and re-open.

Appendix A: Search

This appendix provides an overview of search functionality in the Bank Act Security Registry, including search options available, how each option works, and examples of expected results for searches using different search criteria.

Search Options Available

Notice of Intention (NOI) and Certificate of Release (COR) searches both allow search by the following options:

1. Search by Registration Number
2. Search by Debtor Name

Note: There is no option to search by customer File Reference number.

Province of Registry

All searches require the Province of Register to be entered; and the search will only query records in the particular province of registry selected in the search.

There is no option to complete a search for a given Registration Number or Debtor name across all provinces in a single search.

Note: Fees associated with searches, are associated with the Province of Registry entered on the search.

Active Records Search

Search is on active NOI or active COR records.

- If you search an inactive NOI or COR number, the results returned will be "No Results Found."
- When searching by debtor, if there are no active records containing the debtor's name, the results returned will be "No Results Found."
- An NOI that has expired will not show up in the results of an NOI or COR search.

Search by Number

Search by number is specific to the specific NOI or COR registration number.

1. For an NOI search, the NOI number is entered for the purpose of search.

2. For a COR search, the COR number is entered for purpose of search. If searching by the NOI number in a COR search, the search will return no results.

NOI or COR record information will only be included in search results if there is an exact match for the number entered into the search.

- If there is no match on the search, the results will return with a "No matches found." message.

Search by Debtor Name

When Searching the Bank Act Security Registry by debtor name, you may choose to search by either individual name or company name.

Search Features & Input Requirements

Company Name

Search by company name allows for the following search criteria to be selected.

1. Exact match, or
2. Starts with

The search criteria will default to **Exact Match**.

Individual Name

Name fields available on an individual search and criteria which may be selected for each are outlined below.

- *First Name*
  The **First Name** field is a **mandatory** field on a search by individual debtor name. You may select from the following search criteria for the First Name field:
    a. Exact Match, or
    b. Starts with.
  The search criteria will default to **Exact Match**.

- *Last Name*
  The **Last Name** field is a **mandatory** field on a search by individual debtor name.

The **Last Name** field **must be Exact Match** and no other options are present in the search feature dropdown for the **Last Name** on a search by individual.

- *Middle Name*
  The **Middle Name** is an **optional** field on a search by individual debtor name. When a middle name is entered, users may select search criteria of:
    a. Exact Match, or
    b. Starts With.

  If a middle name is entered, the search criteria will default to **Exact Match**.

Search Logic Information for Search by Debtor Name

When completing searches in the Bank Act Security Registry, it is important to note that punctuation, spaces, numbers, and accents matter. Search results are impacted by the inclusion or exclusion of these characters. Details and examples are provided below.

Exact Match

Exact Match searches will only return a result if the data entered on a search is an exact match on the record.

An **Exact Match** search will return a result of “No results found” if:

- any character in the name searched does not match any character in a name field on the record;
- the name searched is missing punctuation;
- the name searched contains punctuation or spaces that are not on the debtor’s name on the record;
- the name searched is missing accents that are on the name on the record; or
- the name search contains accents that are not on the name on the record.

Starts With

A search using **Starts With** criteria will return records that contain an exact character match (to what was entered in the search) at the beginning of the applicable name field.

A **Starts With** search will return a result of “No results found” if:

- any character entered on the search does not match the characters at the start of the name on the record;
- the characters in the search entered do not contain punctuation or spaces which are present at the start of the name on the record;
- the characters in the search entered include punctuation or spaces which are not present at the start of the name on the record;
- the characters in the search entered do not include accents which are at the start of the name on the record (e.g. search includes “e” and record includes “é”); or
- the characters in the search entered include accents which are not included at the start of the name on the record (e.g. search includes “é” and record includes “e”).

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Search By Debtor Name Examples

The following tables provide examples of various search entries and how results for a given record may present. Province of registry will impact results as the search will only query records in the particular province of registry selected in the search. The examples below focus on how different name entry and associated search criteria will impact results.

Note: In the search results column, numbering next to name indicates a unique record returned in results.

	Name of Debtor on NOI or COR Record	Name Entered on Search	Search Criteria	Search Result Records Returned	Search Result Explained
Individual Name	**Jane Mary Smith**	First Name: Jane Last Name: Smith	First Name: Exact Match Last Name: Exact Match	1. Jane Mary Smith	The search will return Jane Mary Smith because an exact match was found on the First and Last Name. No middle name was entered on the search.
		First Name: Jan Last Name: Smith	First Name: Starts With Last Name: Exact Match	1. Jane Mary Smith 2. Jan Smith 3. Jane Margaret Smith 4. Janet Smith	The search will return a result which includes Jane Mary Smith as the first name Starts with "Jan." Records containing other names that have a last name of Smith and a first name starting with "Jan" will also be returned in the results.
		First Name: Jané Last Name: Smith	First Name: Exact Match Last Name: Exact Match	No Results Found.	The first name entered in the search contains an accent which is not on the name in the record in the registry.
		First Name: Jane Last Name: Smith Middle Name: Mar	First Name: Exact Match Last Name: Exact Match Middle Name: Exact Match	No Results Found.	The search will not return a result even through an exact match was found on the first and last name because the middle name was not an exact match.
		First Name: Jane Last Name: Smith Middle Name: Mar	First Name: Exact Match Last Name: Exact Match Middle Name: Starts With	1. Jane Mary Smith 2. Jane Margaret Smith	The name entered on the search was an exact match to the first name and last name on the record and the middle name starts with "Mar". Other records with exact matches on the first and last name and a middle name that starts with "Mar" will also be included in the results.

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	Name of Debtor on NOI or COR Record	Name Entered on Search	Search Criteria	Search Result Records Returned	Search Result Explained
Company Name	**Renée's Tech. Solutions Inc.**	Renée's Tech. Solutions Inc.	Exact Match	Renée's Tech. Solutions Inc.	The search will return a result because there was an exact (character for character) match on the company name entered on the search and the debtor's name on the registry record.
		Renées Tech Solutions Inc	Exact Match	No Results Found.	This search would not return a result because the name entered on the search does not include the apostrophe in "Renée's" and does not include the period after the words "Tech" and "Inc."
		Renee's Tech. Solutions Inc.	Exact Match	No Results Found.	This search would not return a result because the name entered does not contain an accent over the "e" in the name "Renée."
		Renée	Starts With	1. Renée's Tech. Solutions Inc. 2. Renée Farms 3. Renée's Technology Solutions Inc.	This search will return results including records with debtors with a company name starting with "Renée".
		Renée's Tech	Starts with	1. Renée's Tech. Solutions Inc. 3. Renée's Technology Solutions Inc.	This search will return results including records with debtors with a company name starting with "Renée's Tech"
		Ren	Starts With	1. Renée's Tech. Solutions Inc. 2. Renée Farms 3. Renée's Technology Solutions Inc. 4. Reno Nova Limited	This search will return results including records with debtors with a company name starting with "Ren".
		Rene	Starts With	No Results Found.	This search will return "no results found" as there is no record which starts with "Rene". The accent over the "e" in the record on the registry does not match with the non-accented "e" in the search entered.

La Compagnie Montreal Chop Suey Ltee / Montreal Chop Suey Co Ltd	**La Compagnie Montreal Chop Suey Ltee / Montreal Chop Suey Co Ltd**	**Exact Match**	**No Results Found**	**This search will return "no results found" as there is no record which contains both the French and English versions of the name. The French name must be set out as one debtor and the English name as another separate debtor.**
	La Compagnie Montreal Chop Suey Ltee	Exact Match	La Compagnie Montreal Chop Suey Ltee	The search will return a result because there was an exact (character for character) match on the company name entered on the search and the debtor’s name on the registry record.
	Montreal Chop Suey Co Ltd	Exact Match	Montreal Chop Suey Co Ltd	The search will return a result because there was an exact (character for character) match on the company name entered on the search and the debtor’s name on the registry record.
	Montreal’s Chop Suey Co Ltd.	Exact Match	No Results Found	This search would not return a result because the name entered on the search includes “apostrophe s” (Montreal’s) and it includes the period after the word “Ltd”.
	Montreal	Starts With	1. Montreal Chop Suey Co Ltd 2. Montreal Clothing Inc. 3. Montreal Industrial Services Ltd.	This search will return results including records with debtors with a company name starting with "Montreal".
	Mon	Starts With	1. Montreal Chop Suey Co Ltd 2. Montreal Clothing Inc. 3. Monster Décor Ltd.	This search will return results including records with debtors with a company name starting with "Mon".
	La Compagnie M	Starts With	1. La Compagnie Montreal Chop Suey Ltee 2. La Compagnie Medievale de Montreal 3. La Compagnie Margot Fournier	This search will return results including records with debtors with a company name starting with “La Compagnie M”