Actuarial Information Summary (AIS) v4.1 Quick Start Guide v1.4

Provided by the Office of the Superintendent of Pensions, BCFSA

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Overview of Changes to the E-Filing Systems, as of v 3.0

The following document outlines the changes within AIS and APR e-filing systems. In January 2019, BCFSA has updated the AIS e-filing system with a new login method and a feature which allows you to securely attach files to the data submission. The APR e-filing system will be updated prior to the June filing period.

Overview of Managing / Using the User Account

The first noticeable change to the E-Filing systems as of v 3.0 is the Login method. Now each plan will have a User Account where you will require a User Name and Password.

BCFSA has implemented User Accounts to increase security and protect the e-filing system from unauthorized access. The User Account system will generate a User Name and Password for each plan to help keep the plan information and documents secure.

The User Management system has been designed so that there is one **Account Holder** per plan. The **Account Holder** is the person in the plan's **Employer** or the **Day-to-Day Administrator** role who received account credentials from the Superintendent's office. They will receive an email confirming a User Account has been created for a specified plan. The email will contain a User Name and a Temporary Password. If you received this email, please see the section titled "**Managing the User Account When You Are the Account Holder**". If you are not the Account Holder and you did not receive this email, please see the section "**Managing the User Account When You Are Not the Account Holder**".

After the account has been created with a user-defined password, you are ready to log into the AIS and complete the data entry forms. For assistance regarding this process, please see the section titled "Submitting the AIS Filing" or consult the full AIS User Guide.

Managing the User Account When You Are the Account Holder

Assuming you are the Account Holder, you are responsible for managing the account and keeping the login credentials securely stored. This list represents the different features used by the Account Management system to give you the freedom to manage the account at any time and help keep Pension Plan information secure.

1. Account Creation

- a. Logging into the AIS for the first time
- b. Define the account's Security Question and Answer
- c. Create the account's Password

2. Forgot Password

- a. Use the Forgot Password link
- b. Enter the User Name and Security Answer
- c. Logging into the account using the temporary password

3. Account Expiry

a. Updating the account password after it has expired

4. Account Management

- a. Security Question and Answer updates
- b. Password updates

The following pages will show you how each process functions and what information you need.

1. Account Creation

This section will show you how to log into the AIS for the first time. Then it will describe how to specify the Security Question and Answer and how to create the account password. If you are the Account Holder, you would have received an email with the User Name and the Temporary Password. You will use this information to log into the AIS. If you are not the Account Holder, this section is not applicable. You must contact the Account Holder for the account credentials.

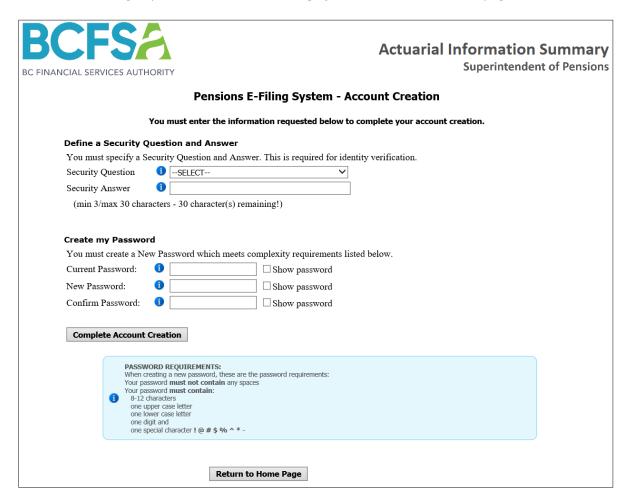
a. Logging into the AIS for the first time

The User Account created email provides you with the information you need to complete the account setup. Click on the AIS e-filing system link in the email to access the new AIS login page.

The new AIS login page requires you to enter a User Name and Password.

Using the "User Name" and the "Temp Password" from the email, enter this information in the corresponding boxes on the Login page. You may type it in the boxes or you may copy and paste it. If you use the copy/paste method, be careful not to copy any characters before or after the text.

After successful login, you will see the AIS E-Filing System – Account Creation page.



b. Define the account's Security Question and Answer

On the **AIS E-Filing System – Account Creation** page, you need to complete the account setup by defining the Security Question and Answer and creating your own Password. If you are not ready to complete these steps, click the "**Return to Home Page**" button. Please note you must complete the account setup before using v.3.0 (or higher) of the e-filing applications.

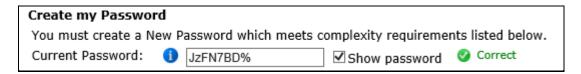
In the Security Question row, pick a question where you will remember the answer and you are the only person who knows the answer. This information is used if you forget the account password or the password expires.

The answer to the security question is required to be a one-word response with a minimum of 3 characters and a maximum of 30 characters (no spaces). The Security Answer is not case sensitive. Therefore, if your answer is "smith" and you typed "SMITH" when this information was required, the system would accept this response as correct.

If the Security Answer meets the number of required characters, the AIS will display a green check mark after your entry.

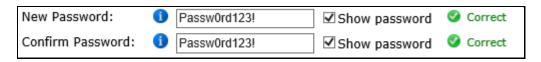
c. Create the account's Password

Now you must complete the section **Create my Password**. This is done by typing in the temporary password provided by email in the **Current Password** box. If the Current Password is entered correctly, the AIS will display a green check mark after your entry (as shown below).

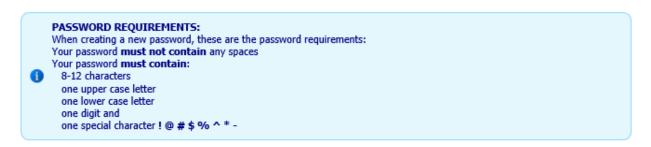


Using "Show Password" is useful because it should be easy to see why the password entered is not correct. If you do not use this option, you will only see black circles for character you enter. Please note the password is case sensitive.

Now you need to specify the **New Password** and repeat it in the **Confirm Password** box. This image shows how this section will appear when the information has been entered correctly.



The password must meet the following requirements as shown in the blue section titled "Password Requirements" (below the Complete Account Creation button).



After typing in a password which meets these requirements in the New Password box, you may copy and paste this password into the Confirm Password box.

Please note you cannot reuse previous passwords. Therefore, if you specify "JzFN7BD%" as the "New Password", (and it is the Temporary Password), you will see the following message.

Current Password:	1	JzFN7BD%	☑ Show password	
New Password:	1	JzFN7BD%	☑ Show password	Previously used passwords not permitted.

The **Confirm Password** box checks whether you have typed in the same password as the "New Password". If these passwords are not the same, you will see the following response.



After all the information has been entered correctly into the Security Question and Answer and the Password sections, you will see green check marks besides each response. Then you may click the **Complete Account Creation** button.

After clicking this button, the system will show the page indicating the account was successfully created. As the Account Holder, you will receive an email confirming it was changed. However, for security reasons, this email will not contain the actual password.

Now you may click the **Continue to E-Filing Forms** button to view the AIS data entry forms or to log out. You will be directed to the Basic Information page.

2. Forgot Password

If you are the Account Holder and you forget or misplace the password, you may use the Forgot Password link on the AIS Login page to create a new temporary password. Then you will need to define your own password the next time you log into the AIS. The only information you need to provide is the plan User Name and the answer to the Security Question when you created the account.

If you are not the Account Holder and you forget the password, you must contact the Account Holder for the account credentials.

a. Use the Forgot Password link

On the AIS login page, click the Forgot Password link directly below the Password input box.



The **Forgot Password** link will redirect you to the **Role Verification** page which will confirm whether you are the Account Holder. As the Account Holder, choose the **Yes** option and then click the **Continue** button.

b. Enter the User Name and Security Answer

On the page titled **Forgot Your Password**, you need to provide the plan's **User Name**. If you enter this information incorrectly, then you will not be able to proceed, and you will see the following message.



After you enter the User Name correctly, the e-filing system will retrieve the Security Question associated with the account. Then you will see the page titled "**Confirm Your Identity**". Here you must enter the answer to the Security Question. If you forget or mistype the answer, then the e-filing system will not be able to create the temporary password and you will see the following message.

This security answer provided does not match the stored security answer. Please try again.

After you enter the Security Answer correctly, click the **Submit** button.

You will be redirected to the page titled "Password Reset Was Successful". Now the e-filing system will create a temporary password for the account. As the Account Holder, you will receive an email containing the User Name and Temporary Password.

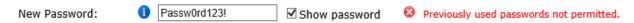
Click the Return to Home Page button to return to the AIS Home Page and login with these credentials.

c. Logging into the account using the temporary password

Now on the AIS home page you must enter the User Name and Temporary Password from the email in the home page User Name and Password boxes.

Upon successful login you will be redirected to an account management page where you will need to change the temporary password to a user-defined password. You need to provide responses for all the input boxes. You may use the **Show password** option to make changing the password easier.

Note the system does not let you specify a password you previously used. This is the reason it displays the following message when "Passw0rd123!" is entered in the New Password box.



If the data entered does not meet the system requirements and you click **Change Password**, you will see an error message in the row causing the issue and a summary of the error messages below the Password Requirements section.

After entering information into all boxes, your input should work if each row shows the word **Correct** to indicate the data input requirements have been met.

Then you may click **Change Password** to update the password to the new value you specified.

You will be redirected to a page which confirms your password was changed successfully. As the Account Holder, you will receive an email confirming it was changed. However, for security reasons, this email will not contain the actual password.

You may click **Continue to the AIS Forms** to view the AIS data entry forms. You will be directed to the Basic Information page. If you only wanted to reset the password, once you are viewing the Basic Information page, you may click the **Log Out** button.

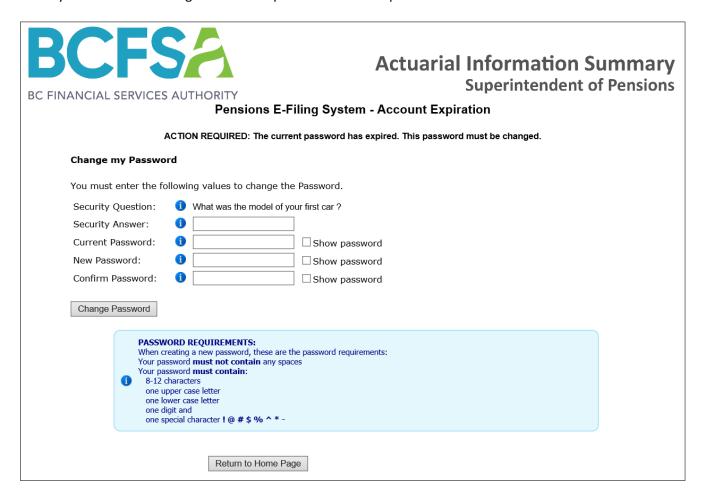
3. Account Expiry

After creating an account by specifying the Security Question and Answer and defining the password, the account credentials will be valid for 6 months. If anyone logs into the account after 6 months, they will be redirected to the Account Management pages where the account credentials will need to be updated. The only information you need to provide is the plan User Name and the answer to the Security Question when you created the account.

If you are not the Account Holder and you forgot the password, you must ask the Account Holder for the new account credentials.

Updating the account password after it has expired

Log into the AIS using the current credentials. You will be immediately redirected to the Account Expiration page where you will need to change the current password to a new password.



You need to provide responses for all the input boxes. You may use the **Show password** option to make changing the password easier.

Note, the system will not let you proceed with a password previously used. This is the reason it displays the following message when "Passw0rd123!" is entered in the New Password box.

If the data entered does not meet the system requirements and you click **Change Password**, you will see an error message in the row causing the issue and a summary of the error messages below the Password Requirements section.

After entering information into all boxes, your input should work if each row shows the word **Correct** to indicate the data input requirements have been met.

Now clicking **Change Password** will update the password and display the page confirming your password was changed successfully. As the Account Holder, you will receive an email confirming it was changed. However, for security reasons, this email will not contain the actual password.

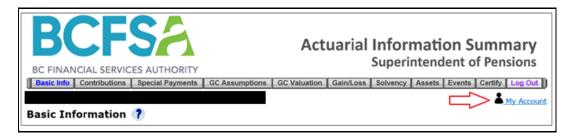
You may click **Continue to AIS Forms** to complete the data entry and submit the AIS. You will be directed to the Basic Information page. If you only wanted to reset the password, once you are viewing the Basic Information page, you may click the **Log Out** button.

4. Account Management

If you are the Account Holder and you want to change the Security Question and Answer, or you want to change the Password, you may make these changes at any time.

If you are not the Account Holder, you do not have ability to change the account credentials and this section is not applicable.

To proceed, you must log into the AIS using the current credentials. Then click the **My Account** icon.

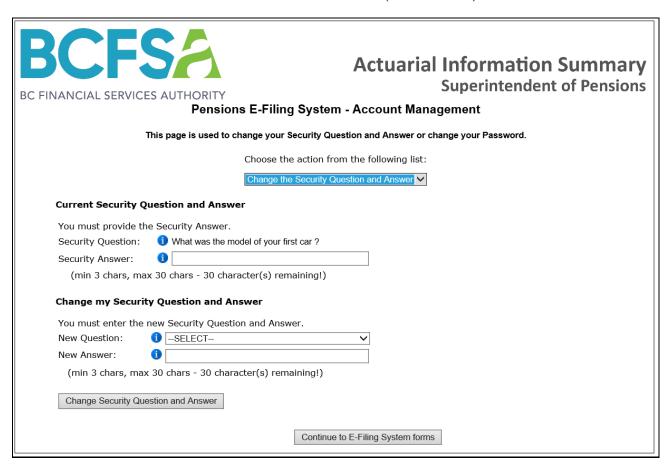


Before you see the Account Management page, you will be redirected to the **Role Verification** page which will confirm whether you are the Account Holder.

As the Account Holder, choose the **Yes** option from the drop-down list. Then click the **Continue** button.

a. Security Question and Answer updates

On the **Account Management** page, you need to choose an option from the list, either **Change the Security Question and Answer** or **Change the Password**. If you chose **Change the Security Question and Answer** you will see the following page:



On this page you must specify values for **New Question** and **New Answer**.

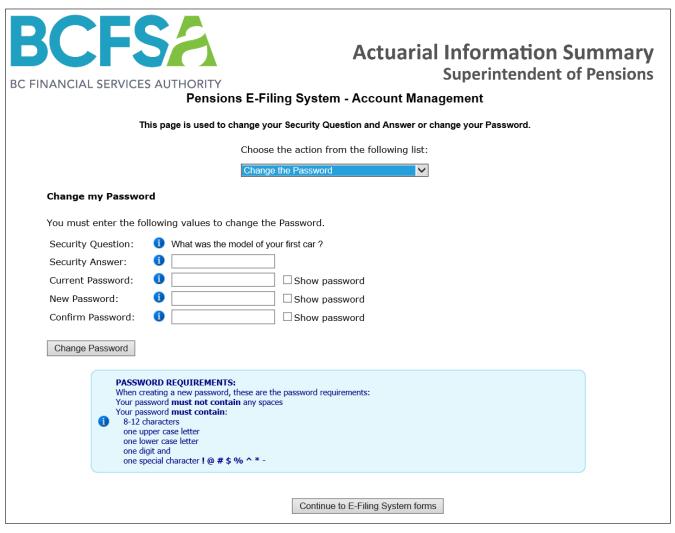
First specify your current Security Answer in the **Security Answer** box. Then pick an option in the **New Question** drop-down list. Then type an answer to this question in the **New Answer** box which is between 3 to 30 characters with no spaces.

Then clicking **Change Security Question and Answer** will update those values and display the page confirming the Security Question and Answer was changed successfully. As the Account Holder, you will receive an email confirming it was changed. However, for security reasons, this email will not contain the actual Security Question and Answer.

You may click **Continue to AIS Forms** to view the data entry forms. You will be directed to the Basic Information page. If you only wanted to reset the Security Question and Answer, once you are viewing the Basic Information page, you may click the **Log Out** button.

b. Password updates

On the Account Management page, if you chose **Change the Password** you will see the following page.



To complete this process, you must enter text in all boxes.

First you must enter the **Security Answer**. Then you need to specify the **Current Password**. After you enter the Current Password you need to enter a **New Password**.

As shown in the image above, there are numerous requirements to create a valid password. For example, "AbcAbc123" is not a valid password. This password is 8-12 characters. It contains two upper case letters where only one is required. It contains multiple lower-case letters and it has multiple digits. However, it does not contain one of the special characters in this list "! @ # \$ % ^ * -". Therefore, if we change the password to "Abc#Abc\$123%", we will have a valid password because now this password has special characters. Then we must specify this password again in the Confirm Password box.

If you make a mistake when entering any of these values, when you click Change Password, the page will display all validation errors. If you enter all text correctly, you will see the "Correct" text besides each line.

Now you may click the **Change Password** button. After clicking this button, you will be redirected to the page confirming the Password was changed successfully.

You may click **Continue to AIS Forms** to view the AIS data entry forms. You will be directed to the Basic Information page. If you only wanted to reset the Security Question and Answer, once you are viewing the Basic Information page, you may click the **Log Out** button.

Managing the User Account When You Are Not the Account Holder

BCFSA gives the account management duties to the Account Holder for each plan. It is their responsibility to create a unique password for the plan's account to share login credentials only with those authorized to enter or review required filing data on their behalf.

If you require access to the AIS System and do not have a valid user name and password, you must contact the Account Holder to request them.

Account management tools are visible to all users within the AIS System, but they are only intended to be used by Account Holders. If you access the My Account page, you will be prompted to verify your role.

Submitting the AIS Filing

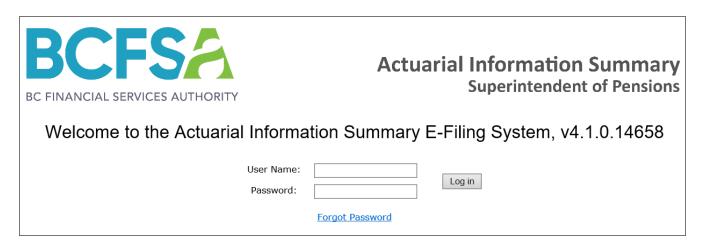
As of v3.0, the AIS E-Filing System has been updated so that you are able to add the **Actuarial Valuation Report** on the **Certify** page. Adding this file is required for all submissions. The file must be in a **PDF** format. This new feature will enable us to process the submission faster and it will help keep the plan documents secure. You will need to add the Actuarial Valuation Report or the AIS will not allow you to complete the submission.

Assuming the account has been created and you know the User Name and Password, here are the steps required to submit an AIS filing:

- 1. Log into the AIS
- 2. Complete AIS data entry
- 3. On the **Certify** page, use **Browse** button to attach the AVR
- 4. Using Upload PDF, upload the file
- 5. Click the **Submit** button
- 6. Save the E-Filing PDF

1. Log into the AIS

Use the plan's User Name and Password to log into the AIS. Each plan has a unique User Name and Password. This screen capture shows the login page.



After logging into the AIS, you will notice there is a new link titled **My Account** in the top right corner. If you are the Account Holder, you may click this link at any time to manage the account by changing the Security Question and Answer or changing the Password. After viewing the Account Management pages, you will click a button to return to the **Basic Information** page of the e-filing forms.

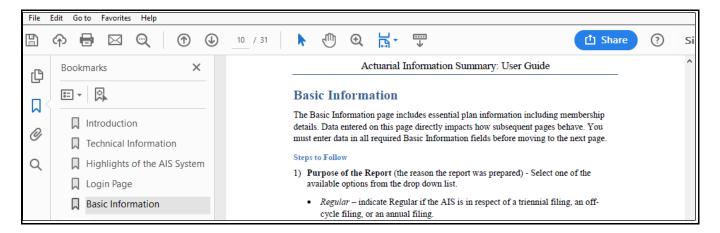
If you are **not** the Account Holder, then you cannot make account changes and the **My Account** link does not serve any purpose. Therefore, it is recommended for you to limit your navigation to the links within the AIS menu bar. Once you are viewing the **Basic Information** page, you may proceed with the AIS data entry.



2. Complete AIS data entry

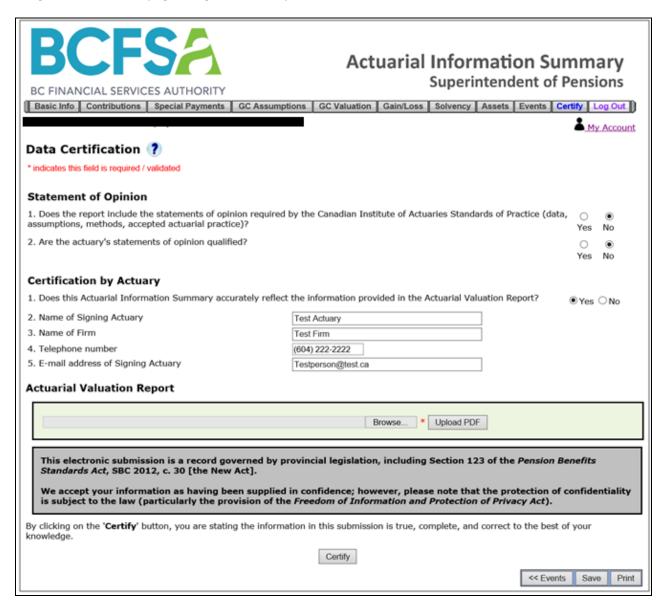
Within the AIS E-Filing System, you will need to complete the data entry for the report period in the same way as before. You can use it to access the AIS E-Filing forms or share it with the individual authorized to submit the AIS filing for the plan. Except for the **Certify** page, all the other pages in the AIS are unchanged. If you need detailed

help with any of the pages, please see the help file "User Guide – New Act" or you may click the icon within the AIS to open this file. Then choose the corresponding section heading in the Bookmarks. This image shows the Bookmarks within the AIS User Guide. All sections are listed here.



3. On the Certify page, use Browse button to attach the AVR

The **Certify** page has changed because it contains a way for you to attach the Actuarial Valuation Report. This image shows the new page design with this option.



After completing the Statement of Opinion and Certification sections, click the "Browse" button. This action will open the Choose File to Upload window. You must find the PDF representing the Actuarial Valuation Report for this plan's submission.

After you have selected this file, click the **Open** button in the lower right corner.

You will see the Actuarial Valuation Report section has been updated to show the file you selected.

4. Using Upload PDF, upload the file

If the file is correct, click the **Upload PDF** button to associate this file with the data. This button will run a process to verify the file has no viruses and it will confirm the file is an authentic PDF. If the file passes these tests, the **Actuarial Valuation Report** section will be updated to show the file was uploaded successfully.

If the file has a virus, you will see a message stating it could not be uploaded.

If you chose a file which was renamed as a PDF file, but it is not a true PDF, you will see an "Invalid File" message.

Once you have completed the data entry on this page and you upload the appropriate PDF, click the **Save** button to verify the data will pass the system validation tests. If all fields pass the data validation tests, the AIS will display the message stating, "There are no Errors and no Warnings on this page".

Now you may click the **Certify** button at the bottom of the page. If there are no issues on any other page, you will be redirected to the **Final Submission** page. This page is used to show you the data has passed all validation tests and it gives you one more chance to review the data before submitting it.

5. Click the Submit button

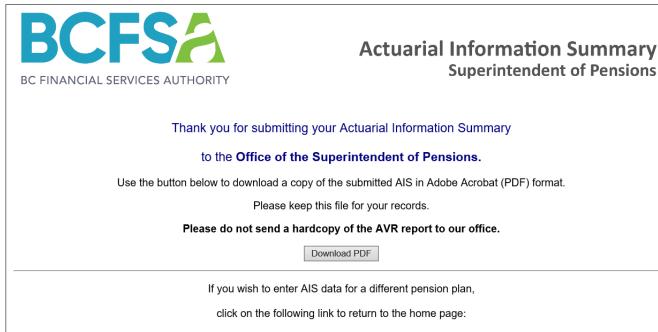
After you are satisfied the data is correct, click the **Submit** button.



After clicking this button, you will see the **Certification** button is disabled and the "Submit" button will change to a Processing button. At this stage, the AIS is creating the final PDF representing the data submitted to BCFSA.

6. Save the E-Filing PDF

After the system has created the PDF, you will be redirected to the following page.



Actuarial Information System - Home Page

OR click on the following button to log out of the AIS E-Filing System

Log Out

We welcome your comments at Pensions@bcfsa.ca.

On this page, save a copy of your submission by clicking on the **Download PDF** button. The browser should show a pop-up window asking if you want to Open or Save the file.

Click the **Save** button to keep a record of the data entered for this plan. It is a PDF file which you may open using Adobe Acrobat Reader.

This file will show the PDF submitted for the Actuarial Valuation Report on the Data Certification page.

Your AVR file Actuarial Valuation Report, 12-2018.pdf

Upload Date Time Dec 27, 2018 09:39 AM

Returning to the AIS E-filing system window, you may click the "Log Out" button to exit the application or you may click the AIS – Home Page link if you will be filing an AIS for another plan.