Organization Management: Step-by-Step

This guide covers three different categories of tasks that relate to organization management: (A) Registering an Organization, (B) Modifying an Organization, and (C) Assigning an Authorized Individual to an Organization.

A. Registering an Organization

If you have been authorized to complete business transactions on behalf of an Organization in the National Online Licensing System, and provided with an Organization Authorization Code by the Department of Fisheries and Oceans (DFO), follow the steps below to register the Organization in your online profile.

1. Click the "Modify" button at the bottom of the "Profile" screen.

Profile	Personal Information
Personal Information	Title:
Representatives	First Name:
Organizations	Last Name:
Licensing	Address:
Licences	Province:
Vessels	City:
Print Documents	Postal Code:
Requests	Phone:
Submit Request	Alternate Number:
Request Status	Fax:
Payments	Email:
Pay Fees	Language Preference:
Credit Allocation	**Fisher Information**
Payment History	Account Number:
	Fisher ID:
	Date of Birth:
	Home Port:
	Region:
	Modify

2. Click the Organization Management link.

Dashboard

Back to system

Please select one of the following links to update, add or activate additional information or services associated with your account:

- Update profile
  Select this link to change information such as address that is associated with your account.

- Activate Enrolment
  Select this link to finalize your enrolment to an application. When prompted, enter your activation code to proceed to the application.

- View or request your delegation code/public identifier
  Select this link to view or request a delegation code/public identifier. A delegation code or public identifier is added by other users:
  - authorizing you to represent them in dealing with DFO
  - assigning you one or more roles within your organization, as registered with DFO

- Manage representative records
  Select this link to manage your representatives and their access rights regarding specific systems.

- Organization Management
  Select this link to register or update your organization.

3. Type the DFO-provided Organization authorization code into the "Authorization code" box and then click the "Validate authorization code" button.

Organization Management

Please select one of following options to register an organization. Or update your organization data, if you are the contact person of the organization:

Registration with an authorization code

Locate or register an existing organization by submitting a DFO-provided organization authorization code.

Authorization code: ●●●●●●●   Validate authorization code

Modify Organization

Select listed organization to modify its profile:

Organization Name	Role(s)
Acme Inc.(O/A English Name)	Contact Person

Back

4. Review the Organization details and ensure the information listed on the screen is correct. You will be prompted to fill in any missing information. Click "Confirm" if the details are complete.

Organization authorization code - Confirm profile

Please review the organization described below and scroll to the bottom of the form to proceed as appropriate.

Organization Profile

Operating as English name:*	New Organization
Operating as French name:	nouvelle organisation
English abbreviation:	
French abbreviation:	
Preferred Language:	English
Begin operations date:	2014-09-17
Ceased operations date:	
E-mail:	
Organization description:	

Legal Organization Details

Legal business name:*	New Organization
Legal business type:*	Trust
Incorporated date:	2014-09-17
Dissolved date:	
Fiscal end date:	
CRA registration number:	0
CRA reference number:	0
CRA program:	

Organization Contact Information

Mailing Address:	
Telephone:	(613) 9900000
Fax:	(613) 9900001

The organization described above matches the authorization code you have provided. To assign yourself as the initial contact person for the organization, select *Confirm*. If this is not the organization you expected or you do not wish to assign yourself as the initial contact person, select *Cancel* to return to the Organization Management screen.

[Confirm]   [Cancel]

5. Upon confirmation, you should return to the "Organization Management" screen. Your Organization should now appear and be listed as an Organization that can be modified.

Organization Management

Please select one of following options to register an organization. Or update your organization data, if you are the contact person of the organization:

Registration with an authorization code

Locate or register an existing organization by submitting a DFO-provided organization authorization code.

Authorization code: [_____]   [Validate authorization code]

Modify Organization

Select listed organization to modify its profile:

Organization Name	Role(s)
Acme Inc.(O/A English Name)	Contact Person
New Organization	Contact Person

[Back]

6. Click the "Back" button on the "Organization Management" screen. Then, from the "Dashboard" screen, click the "Back to System" hyperlink to return to the National Online Licensing System.

Dashboard

Back to system

Please select one of the following links to update, add or activate additional information or services associated with your account:

- Update profile
  Select this link to change information such as address that is associated with your account.

- Activate Enrolment
  Select this link to finalize your enrolment to an application. When prompted, enter your activation code to proceed to the application.

- View or request your delegation code/public identifier
  Select this link to view or request a delegation code/public identifier. A delegation code or public identifier is added by other users:
  - authorizing you to represent them in dealing with DFO
  - assigning you one or more roles within your organization, as registered with DFO

- Manage representative records
  Select this link to manage your representatives and their access rights regarding specific systems.

- Organization Management
  Select this link to register or update your organization.
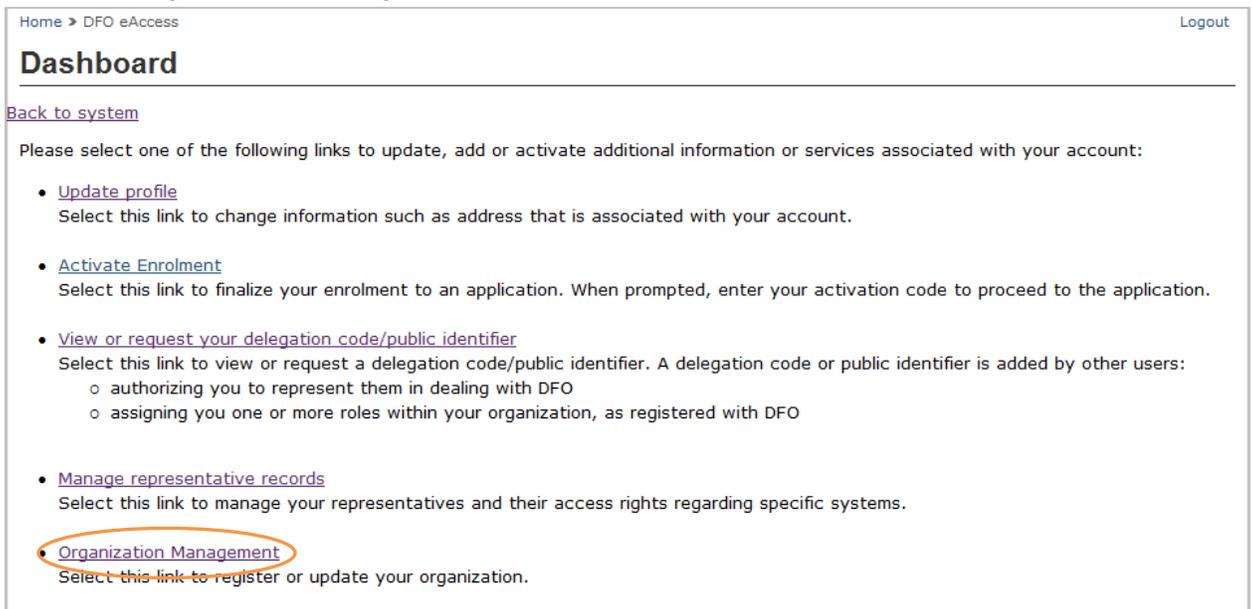
B. Modifying an Organization

To modify the contact information for an Organization for which you are authorized to complete business transactions using the National Online Licensing System, follow the steps below.

1. Click the "Modify" button at the bottom of the "Profile" screen.

2. Click the "Organization Management" link.

3. Select the Organization that you wish to update by clicking the name of the Organization.

Organization Management

Please select one of following options to register an organization. Or update your organization data, if you are the contact person of the organization:

Registration with an authorization code

Locate or register an existing organization by submitting a DFO-provided organization authorization code.

Authorization code: [_____]   [Validate authorization code]

Modify Organization

Select listed organization to modify its profile:

Organization Name	Role(s)
Acme Inc.(O/A English Name)	Contact Person

[Back]

4. The "Organization Details" screen will list the information about this Organization. Click on the "Modify" button after the "Organization Contact Information" table.

Organization Details

Organization Profile

Operating as English name:*	Acme Inc.(O/A English Name)
Operating as French name:	L'Acme Inc. (O/A French Name)
English abbreviation:	AI
French abbreviation:	A
Preferred Language:	English
Begin operations date:	2014-01-01
Ceased operations date:	
E-mail:	email@email.com
Organization description:	Modified

[Modify]

Organization Profile
Legal Organization Details
Organization Contact Information
Organization Role Assignments (3)

[Back]

5. Read the "Modify Organization – Terms and Conditions of Use" screen and click the "I accept" button.

Modify Organization - Terms & Conditions Of Use

Fisheries and Oceans Canada Secure Online Terms and Conditions of Use

In return for Fisheries and Oceans Canada giving you access to DFO Secure Online Services, you agree to abide by the following Terms and Conditions of Use:

1. You agree to keep your user ID and password secret, and not to share them with anyone. If you suspect that others have obtained them, you are responsible for contacting DFO immediately.
2. You certify that any information provided by you is true, accurate and complete
3. You understand and accept that DFO can revoke your access to DFO Secure Online Services if you fail to abide by these Terms and Conditions of Use, as a security measure or for administrative reasons
4. You understand and accept that DFO is not responsible for any losses or damages incurred by anyone because of:

   - The use of the information available through DFO Secure Online Services
   - Any restriction, delay, malfunction, or unavailability of DFO Secure Online Services

Your personal information is being collected pursuant to the *Department of Fisheries and Oceans Act* and the *Financial Administration Act* and will be used only to establish an online profile. For more details or access to your personal information, contact the Access to Information and Privacy (ATIP) Coordinator at DFO at ✉ ATIP-LAIPRP@DFO-MPO.GC.CA.

To continue, please click on *I Accept* to indicate your acceptance of these Terms and Conditions. Click on *I Do Not Accept* if you do not agree with these Terms and Conditions. Click on *Cancel* to return to a previous screen. Please note that you will not be able to access DFO Secure Online Services unless you accept the Terms and Conditions.

[I accept]   [I do NOT accept]

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6. Type the required information into the "Organization Profile" screen. When you are finished, click the "Next" button.

Modify Organization

* Required Field

Organization Profile

Operating as English name:*	Acme Inc.(O/A English Name)
Operating as French name:	L'Acme Inc. (O/A French Name)
English abbreviation:	AI
French abbreviation:	A
Preferred Language:	English ▼
Begin operations date:	2014-01-01 📅
	(date format is 'yyyy-mm-dd', e.g. 2009-01-23)
Ceased operations date:	📅
	(date format is 'yyyy-mm-dd', e.g. 2009-01-23)
E-mail:	email@email.com
Organization description:	Modified

[Next]   [Cancel]

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7. Type the required information into the "Legal Organization Details" screen. When you are finished, click the "Next" button.

Modify Organization -

* Required Field

Legal Organization Details

Legal business name:* `Acme Legal Name`

Legal business type:* `For-Profit Corporation ▼`

Federal department: `▼`

(This field is only required when "Government Department" is selected in Legal business type)

Incorporated date: `[     ]` 📅

(date format is 'yyyy-mm-dd', e.g. 2009-01-23)

Dissolved date: `[     ]` 📅

(date format is 'yyyy-mm-dd', e.g. 2009-01-23)

Fiscal end date: `[     ]` 📅

(date format is 'yyyy-mm-dd', e.g. 2009-01-23)

CRA registration number: `0`

CRA reference number: `0`

CRA program: `[     ]`

Incorporation jurisdiction: ⦿   Federal

       ○   Provincial:

`Alberta ▼`

[**Next**] [Previous] [Cancel]

8. Review the address on the "Organization Mailing Address" screen. You may continue without modifying the address. To do this, click on the "continue without modifying the address" button and then the "Next" button. If this information is not correct, you may modify the address by clicking your cursor into the box beside the "change address country." When you are finished, click the "Next" button.

Modify Organization

The address below is currently entered for your profile:

Mailing Address:

    123 main st.
    Montreal QC H0H0H0

Organization Mailing Address

Would you like to:

⦿ continue without modifying the address

○ modify the address information

    ☐ Change address country

    ☐ Delete address

[**Next**] [Previous] [Cancel]

9. If you chose the "continue without modifying the address" button, you will need to review the Organization's telephone number and fax number. Type the required information into the "Modify Organization - Organization Telephone & Fax" screen. When you are finished, click the "Next" button.

10. You will come to the "Organization Profile Confirmation" screen. From this screen, click the "Save" button to return to the "Organization Details" screen. Click the "Back" button to return to the Dashboard screen and then click "Back to System" hyperlink to return to the National Online Licensing System.

Organization Profile

Operating as English name:*	Acme Inc.(O/A English Name)
Operating as French name:	L'Acme Inc. (O/A French Name)
English abbreviation:	AI
French abbreviation:	A
Preferred Language:	English
Begin operations date:	2014-01-01
Ceased operations date:	
E-mail:	email@email.com
Organization description:	Modified

Legal Organization Details

Legal business name:*	Acme Legal Name
Legal business type:*	For-Profit Corporation
Federal department:	
Incorporated date:	
Dissolved date:	
Fiscal end date:	
CRA registration number:	0
CRA reference number:	0
CRA program:	
Incorporation jurisdiction:	◉ Federal
	○ Provincial:
	Alberta

Organization Contact Information

Mailing Address:	123 main st. Montreal QC H0H0H0
Telephone:	(514) 2222222
Fax:	

[Save] [Previous] [Cancel]

11. If you chose the "modify the address information" button, you will need to make the necessary address changes through a series of instructed screens before you return to the National Online Licensing System.

Home ▸ DFO eAccess   Logout

Modify Organization - Organization Mailing Address

If you have a Canadian address, enter your postal code.

* Required Field

Postal Code:*   H0H0H0

[Next] [Skip Address] [Enter address manually] [Previous] [Cancel]

C. Assigning an Authorized Individual to an Organization

If you are already authorized to complete business transactions on behalf of an Organization in the National Online Licensing System and you wish to authorize one or more other individuals to complete business transactions on behalf of the Organization, please follow the steps below.

Note A: The National Online Licensing System supports a one-to-many relationships in Organization Management, which means that more than one individual may be authorized to conduct business transactions on behalf of the Organization.

Note B: Only individuals may be authorized to conduct business transactions on behalf of an Organization. Other Organizations or companies cannot be authorized to do so.

Note C: You will need to have the unique Public Identifier of the individual you wish to assign to the organization. Please refer to the "Getting a Delegation Code or a Public Identifier: Step-by-Step" guide to find out how to obtain a Public Identifier.

1. Click the "Modify" button at the bottom of the "Profile" screen.

2. Click the "Organization Management" link.

3. Select the Organization that you want to assign a new authorized individual.

4. At the side of the "Organization Details" screen, there is a section called "Organization Role Assignments" in which all authorized persons will be listed. Click the "Assign New" button at the bottom of the list.

Organization Details

Organization Profile

Operating as English name:*   Acme Inc.(O/A English Name)

Operating as French name: L'Acme Inc. (O/A French Name)

English abbreviation: AI

French abbreviation: A

Preferred Language: English

Begin operations date: 2014-01-01

Ceased operations date:

E-mail: email@email.com

Organization description: Modified

[Modify]

Organization Profile
Legal Organization Details
Organization Contact Information
Organization Role Assignments (3)

[Back]

Organization Details

Organization Role Assignments

	role	name	effect from	effect to	Active	
☐	Contact Person	Contact 1	Aug 06, 2014		☑	de-activate
	Contact Person	Contact 2	Jan 13, 2014		☑	
☐	Contact Person	Contact 3	Jul 04, 2014		☑	de-activate

[Assign new]   [Remove selected]

Organization Profile
Legal Organization Details
Organization Contact Information
Organization Role Assignments (3)

[Back]

5. Choose the role of this individual in the "Assign new individual to Organization" screen. Then, type in the individual's Public Identifier that they have obtained through their own personal profile. When you are finished, click the "Submit" button.

Assign new individual to organization

You have requested to add an individual to the selected organization. In order to add a new individual, you will need to select their role within the organization, as well as their *eAccess Public Identifier*. The individual can retrieve their public identifier by selecting *View or request your public identifier* when accessing the DFO dashboard when signed in to eAccess.

If you have the individuals public identifier, you may enter it below. Or select *Cancel* if the user has not yet sent you his or her public identifier.

Role *:	Contact Person ▼
Individual's public identifier *:	8001234567

[Submit]   [Cancel]

6. The details for the assigned individual should appear in the "Assign individual to organization - Public Individual." If this is the correct person, click on the "Assign Contact Person" button.

Assign individual to organization - Public Individual

The details for public individual associated to the public identifier is detailed below.

To add the individual to the organization **Acme Inc.(O/A English Name)** as a **Contact Person**, select the *Assign Contact Person* button. Otherwise, select *Back* to enter a new public identifier or modify the assigned role or select *Cancel* to return to the organizations details.

Profile

Legal Given Names:*	Contact
Legal Family Name:*	Person 4
Email:	cp@email.com
Mailing Address:	
Telephone:	
Fax:	
Mobile:	

[Assign Contact Person]   [Back]   [Cancel]

7. The assigned individual should now appear in the "Organization Details" screen.

8. Click the "Back" button under the "Organization Contact Information" table, and click the "Back" button at the bottom of the "Organization Management" screen. Then, from the "Dashboard" screen, click the "Back to System" hyperlink to return to the National Online Licensing System.

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