

Ontario's Cap and Trade Program How to Participate:

Account Agent Updates in the Compliance Instrument Tracking System Service (CITSS)

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1. Introduction

As an approved Account Agent, you can log into CITSS and update the information previously provided during the Recognition as an Account Agent process. This includes your profile information and your password.

2. Updating an Account Agent Profile in CITSS

The process for updating your Account Agent profile information depends on which field needs to be updated. Some fields can be updated automatically in CITSS, while others may require Director (Registrar) approval and/or additional supporting information (see Table 1 for update requirements for each field).

Login into CITSS www.wci-citss.org and click on the **My User Profile** link to access the User Detail page. Press the Edit button to update a field.

2.1 Updating Account Agent Profile Fields: No Approval Required

- Complete data entry update into CITSS and submit changes.
- Update takes effect immediately.
- Email automatically sent out by CITSS confirming change.

2.2 Updating User Profile Fields: Approval Required and/or Additional Documentation

- Complete data entry into CITSS and submit changes.
- Director (Registrar) receives the proposed update request.
- Director (Registrar) approves/denies or requests additional supporting documentation (through email).
- If applicable, Account Agent submits supporting documentation.
- If applicable, Director (Registrar) approves/denies change based on documentation review.
- Approved changes are reflected in CITSS.
- Email automatically sent out by CITSS confirming change

2.2.1 Table 1: Requirements for updating Account Agent profile fields in CITSS.

| Field | Required Field | Registrar Approval Required | Additional Documentation Required |
|-----------------------------|----------------|-----------------------------|--|
| Personal Information | | | |
| Salutation Suffix | No | Yes | None if entry is a correction and if proof-of-identity documents show corrected salutation and/or suffix. If edit involves a name change, new verification of identity attestation is required. |

| Field | Required Field | Registrar Approval Required | Additional Documentation Required |
|-------------------------|----------------|-----------------------------|---|
| First name Last name | Yes | Yes | None if entry is a correction and if proof-of-identity documents show corrected name. If edit involves a name change, a new Identity Verification and Attestations Form with notarized Government-issued identification documents are required. |
| Middle name | No | Yes | None if edit involves a correction and if proof-of-identity documents show corrected name. If edit involves a name change, a new Identity Verification and Attestations Form with notarized Government-issued identification documents are required. |
| Date of birth | Yes | Yes | No change other than correction allowed. In which case, proof-of-identity documents must show date of birth as changed. |
| Telephone number | Yes | Yes | None. |
| Correspondence language | Yes | No | |

| Field | Required Field | Registrar Approval Required | Additional Documentation Required |
|---|----------------|-----------------------------|--|
| Job title Organization name Organization department Telephone number Fax number | No | No | |
| Mobile phone number | No | No | |
| Email address | Yes | Yes | No documentation required. Email address must be confirmed by the Director (Registrar). |
| Address of Primary Residence | | | |
| Street 1 City State/province Postal code Country Street 2 (not required) | Yes | Yes | None if entry is a correction and the proof of identity documents show the corrected address. If edit involves a name change, a new Identity Verification and Attestations Form with notarized Government-issued identification documents are required. |

| Field | Required Field | Registrar Approval Required | Additional Documentation Required |
|--|----------------|-----------------------------|-----------------------------------|
| Mailing Address | | | |
| Street 1 Street 2 City State/province Postal code Country | Yes | Yes | None. |
| Password | | | |
| New password | Yes | No | None. |

3. Updating and Re-setting Account Agent Passwords

CITSS Account Agents must have their User IDs and passwords to access the system. User IDs and passwords should be kept confidential and never be shared with another individual.

3.1 User IDs

- User IDs cannot be changed in CITSS.

3.2 Passwords

- Passwords are known only to the Account Agent and can only be changed by him or her.
- MOECC staff do not have access to an Account Agent’s password, and cannot retrieve it for them.
- If an Account Agent forgets their password but can verify their identity through their security questions, the CITSS can provide a temporary password to reset their password.
- It is recommended that passwords be changed regularly as a security measure.

- The CITSS will automatically require that each user change their password every 60 days.

3.2.1 Update Password

If you wish to update your password, you can do so from the My User Profile page.

- A. From the **User Home page**, click on **My User Profile**.
- B. On the **User Detail page**, click on the **Edit button**.
- C. Scroll down to the lower portion of the page to **Update Password**.
- D. **Enter Current Password and New Password** in the provided fields.
- E. **Submit Changes**. The changes take effect immediately – no approval is required.

3.2.2 Reset Password

If you lose or forget your password, you can be issued a temporary password that will provide temporary access into the CITSS so that you can login and establish a new password.

- A. Click the **Forgot Password** link on the CITSS Login page.
- B. The **Request Password page** displays. Enter your User ID and the email address that you provided with your Recognition as an Account Agent application.
- C. Complete the CAPTCHA verification and click **Continue**. The CAPTCHA is a program that protects websites by ensuring the user is human; it may ask the user to type in a word that is displayed on screen or answer a particular question.
- D. The **Request Password – Answer Security Question page** will appear.
- E. Enter the answer you provided to the security question on the screen. Note that answers are case sensitive.
- F. If the security question is answered correctly, a temporary password will be sent to the email address provided. This password is valid for 24 hours. During this time, you must log in to the CITSS and the system will prompt you to reset your password.
- G. If you answer the security question incorrectly, a different question will be displayed. If you answer all three questions incorrectly, your user access will be disabled.
- H. For any password-related questions, including if your access has been disabled, please contact the Ontario Cap and Trade Help Desk at 1-888-217-3326 or by email at CThehelp@ontario.ca.