

Refer to the following materials, if required:

- How do I search for an applicant/registrant?
- How do I navigate the Dashboard Report?

i The steps below outline one of the ways to access the Applicant/Member page. Another way to access the Applicant/Member page is through the Dashboard Report.

STEP 1

Click on “PSW REGISTRY OF ONTARIO” (1B) within the “REGISTRIES” (1A) tab.

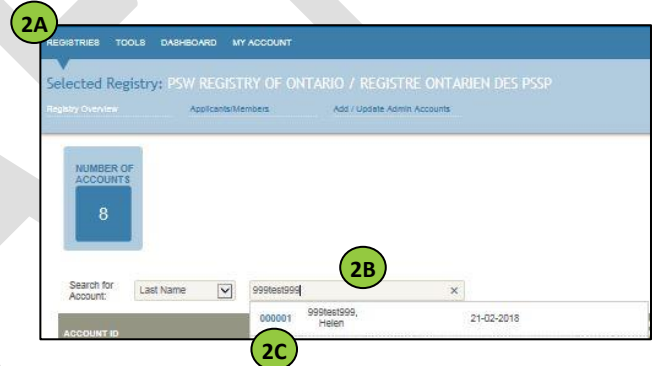


STEP 2

You will be redirected to the **Home Page (2A)**.

Search (2B) for an applicant/registrant. You may use the “Search for Account” dropdown bar to change your search criteria.

Click on the applicant’s **Account ID (2C)**.

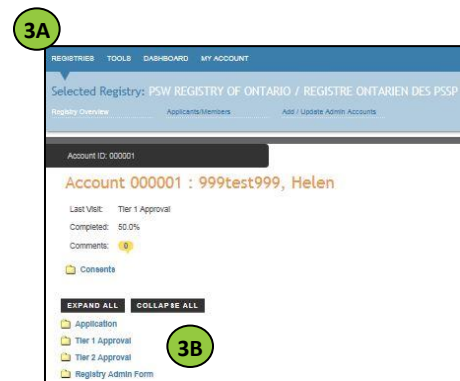


STEP 3

You are now on the **Applicant/Member Forms (3A)** page.

Click on the following folders (3B) to update and/or complete the Forms as required:

- Application
- Tier 1 Approval
- Tier 2 Approval
- Registry Admin Form



i Forms are auto saved during any edits. While the Form is being auto saved, the “SAVE” and “SUBMIT” buttons will be grey and cannot be clicked. Wait a few seconds and try again.

Guidelines for using the Applicant/Member page

Overview of the Applicant/Member page

The **Applicant/Member** page is where Tier 1 and Tier 2 administrators can update and/or complete their respective Forms in order to process a PSW application. The history of all activities within each folder is saved, and is made available through the Audit Trail link within each Form. Files can also be uploaded in the folders that are available on the page and comments can be added for each of the files.

For more information on the type of documents that are uploaded in each folder, please refer to “How do I upload files?”

Description of Page Sections:

Completed	Track the overall progress of the application, expressed as a percentage.
Comments	Add and track administrators’ comments.
Consent	Track the applicant’s consent forms.
Application	A record of the PSW’s Application Form received from the applicant. Any changes in the Application Form will need to be updated in the Application folder. Supporting documents for the changes are uploaded in this folder.
Tier 1 Approval	Track Tier 1 approvals and comments, as well as mandatory supporting documents for the PSW application.
Tier 2 Approval	Track Tier 2 approvals, denials, and comments for applications.
Registry Admin Form	Record of the most up-to-date information about a registrant. The PSW Application Form (currently in the “ Application ” folder) will be copied into the Registry Admin Form by Tier 1 once an application has been approved by Tier 2. This profile will then be viewable on the employer view. Any changes to registrant information (even if it is not viewable on the Registry, e.g., change of address) will need to be updated in the Registry Admin Form folder and not in the Application folder. Supporting documents for changes in registrant information are uploaded in this folder, as well as the complaints and appeals processes, if required.