Teranet Manitoba
Account Management User Guide

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Version 4.00

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Introduction

We offer two types of deposit accounts for you to manage your firm's funds:

1. A **land titles office (LTO) deposit account** – managed by your account administrator through the Documents Online (DOL) page

2. A **Personal Property Registry (PPR) deposit account** – managed by your account administrator through the PPR online page

This guide will look at these two types of accounts and how to manage the user access and funds associated with each account. Which accounts you need access to (one, or the other, or both) will depend on the type of business you conduct with TPR.

Common acronyms

There are a few common acronyms that you will see in this guide:

DOL	Documents Online
LTO	Land titles office
PDS	Plan Deposit Submission
PPR	Personal Property Registry
SPO	Survey Plans Online
TOL	Titles Online
EFT	Electronic funds transfer

Browser requirements

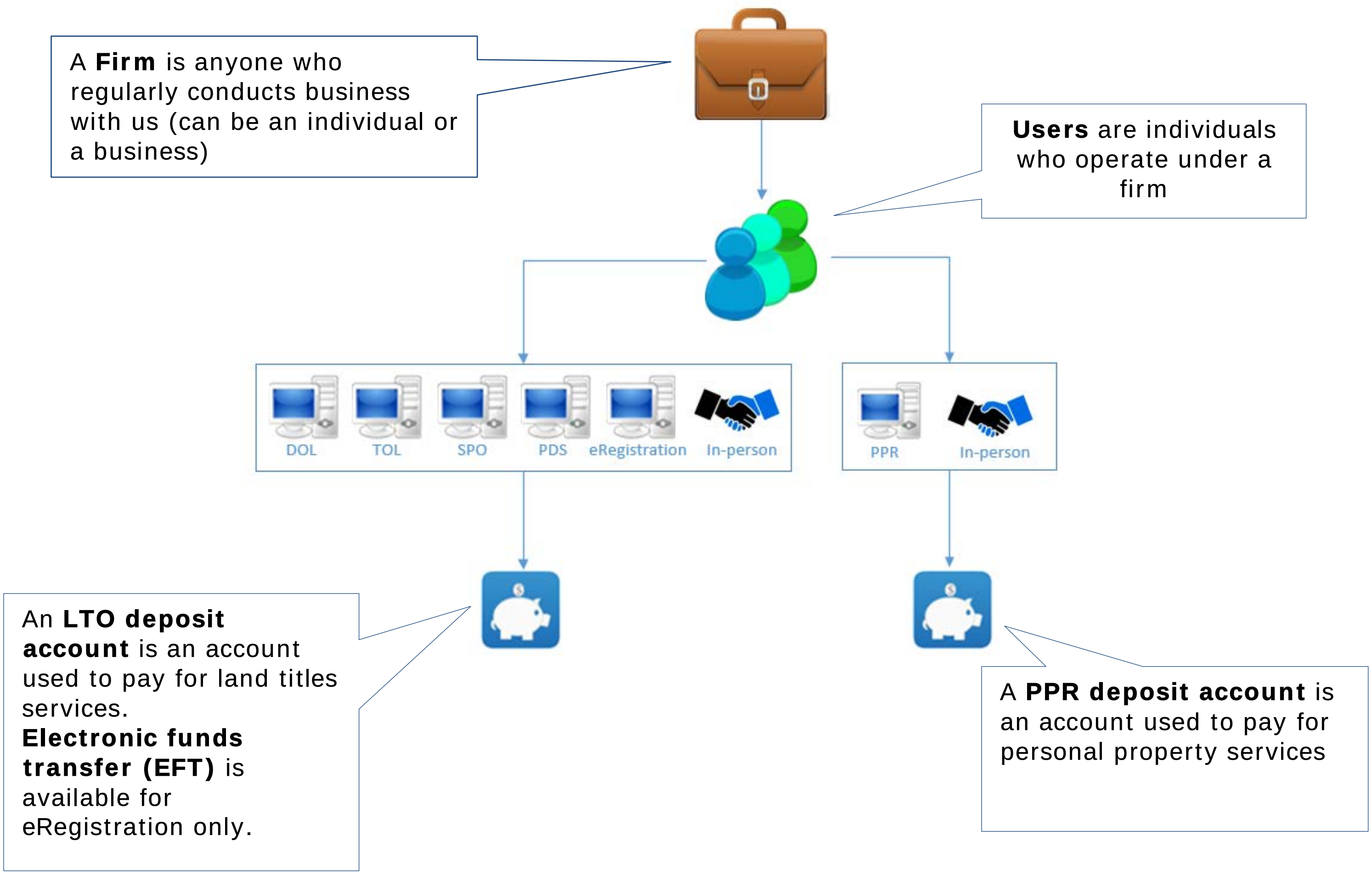
Please visit our website for the most recent browser requirements.

Access your deposit accounts online

There are multiple ways to access your deposit accounts. LTO deposit accounts are managed through DOL while PPR deposits accounts are managed through PPR online. All of these can be found on our website home page.

Firm and account administration

Firm and account administrators are defined when you apply for access. They are responsible for maintaining your firm's user list and contact information. Your firm and account administrators can be the same.



Who is the administrator?	
Firm	Firm administrator
User	Firm administrator (add/remove users to the firm)
LTO deposit account	Account administrator (add/remove existing users to account)
PPR deposit account	Account administrator (add/remove existing users to account)

User access

Anyone in your firm who is expected to use, oversee or manage access to your firm's online services and/or accounts needs a user ID.

This includes anyone who:

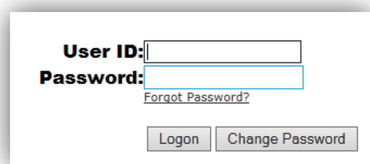
- ✓ Searches our online services
- ✓ Registers using our online services
- ✓ Manitoba Land Surveyors
- ✓ Is the firm administrator
- ✓ Is an deposit account administrator
- ✓ Is a supervising lawyer to land titles transactions

Use our Client Application Form to apply for any the requirements mentioned above.

User logon

1. To log on click on the **logon** icon in the left side panel 

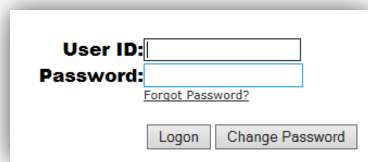
2. Enter your **user ID** and **password**
3. Click **logon**



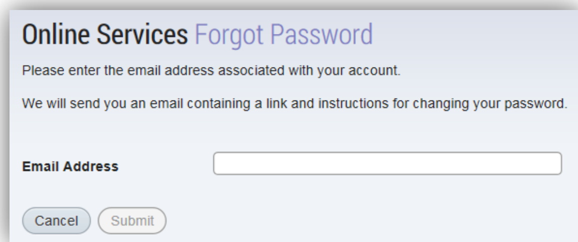
You use the same user ID and password for all of our online services (eRegistration, TOL, DOL, SPO, PPR and PDS). All users should have their own, individual user ID. There is no cost for individual user IDs.

Reset a password

If you get locked out of your account or forget your password you can reset your password by selecting the “Forgot Password?” option from the logon page:



Enter your email address in the box provided and our system will email you a link to reset your password.



You should receive an email with a link to reset your password within five minutes.

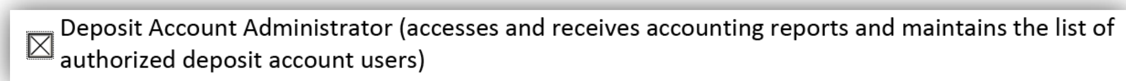
You won’t receive the email if:

1. The email address you provided contained a typo
2. The email address you provided does not match the email associated to your profile
    - For security reasons, we can only send a reset link to the email address you used when you registered your profile
3. The email address you entered is shared with another user
    - For security reasons, we can only send a reset link to an email address that is unique to your profile
4. The email with the link to reset your password was sent to your junk folder
5. You never provided an email address

Manage your LTO deposit account

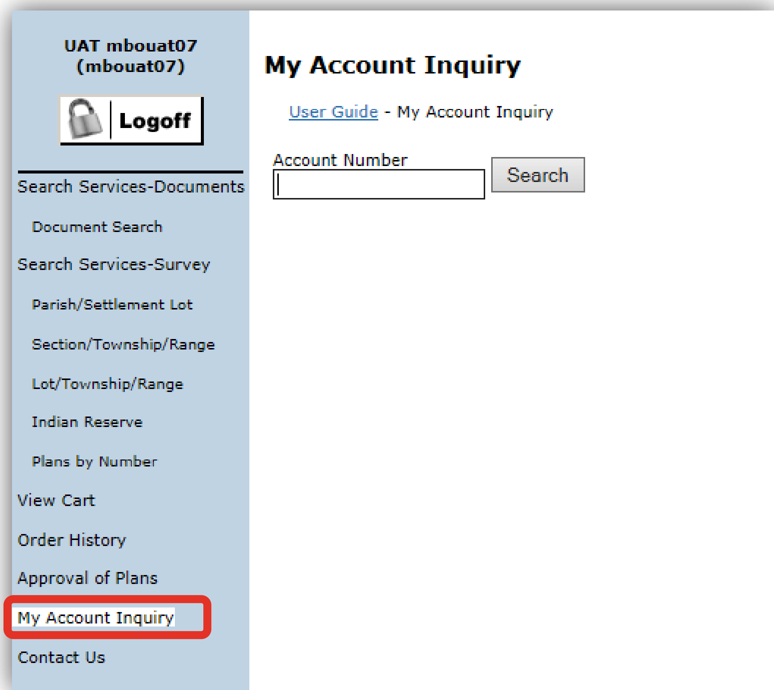
You must meet the following requirements to be able to manage your LTO deposit account:

- Have a valid user ID and password for our online services
- Be registered as a **deposit account administrator** which will give you the security permissions needed to manage your account (you may identify two account administrators on the Client Application Form)



Account search

1. Click on my **account inquiry** in the list of financial services
2. Enter your **account number** you wish to search
3. Select **search** to view your search results



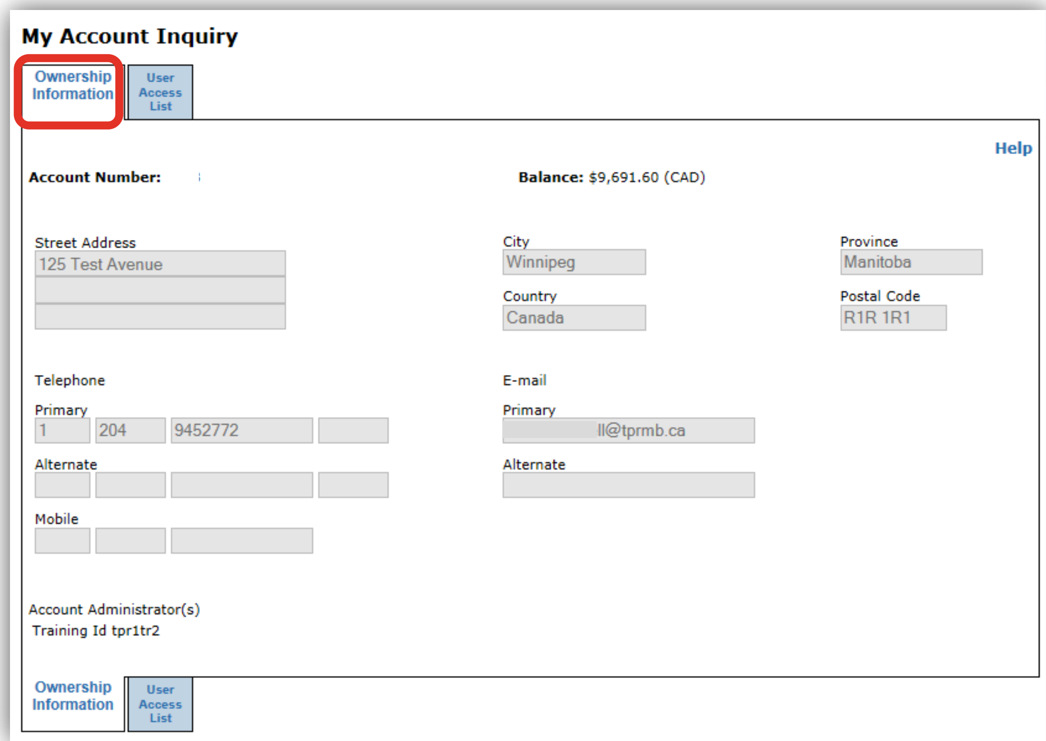
Once you access your account you can update your ownership information and user access.

Update ownership information

Ownership information includes basic contact information for the account, account administrator and the backup account administrator.

You can update the address, telephone number, fax number and email fields from this screen.

Please contact our Client Service Team to update the account name, administrator or backup administrator fields, the firm administrator (or their backup).

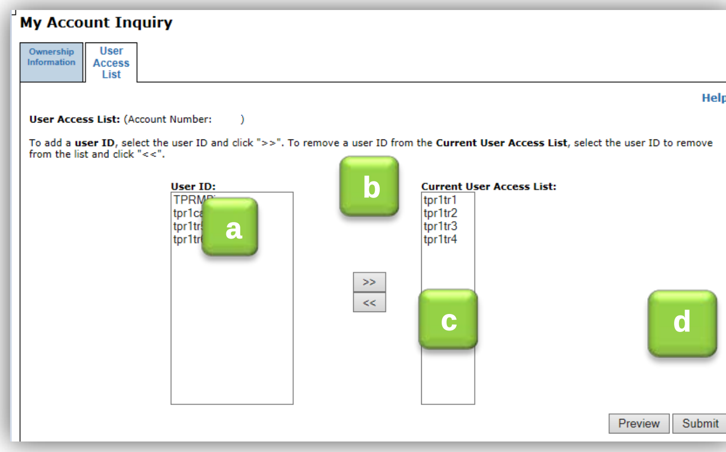


Update user access list

You can also add or remove user access to the LTO deposit account from **account inquiry**. Account administrators (or backup account administrators) can grant/revoke user access to an LTO deposit account under the **user access list** tab.

Add users

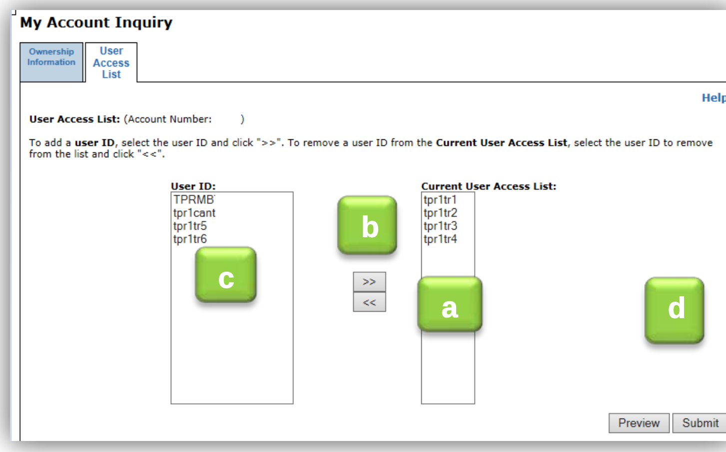
A full list of a firm's registered user will be listed in the user ID column on the left. Remember that all LTO deposit account users must be registered and issued an online services user ID before you will see their user ID on the list.



a. Select (highlight) the user ID(s) that you would like to grant access to
b. Select the **>>** to add the user (grant access)
c. The new user ID will appear in the **current user access list**
d. Once you click **submit** your changes will be saved and all users in the current user access list will have access to the LTO deposit account listed at the top of the page
    - You can also preview the list to make sure your changes are accurate

Remove users

Removing users is the exact opposite process as adding users.

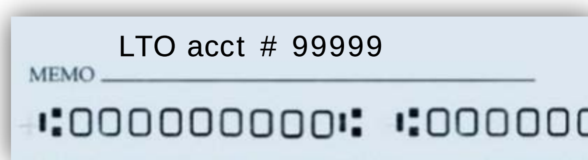


a. Select (highlight) the user ID(s) that you would like to revoke access to
b. Select the **<<** to remove the user (revoke access)
c. The user ID will move from the **current user access list** to the general **user ID list**
d. Once you click **submit** your changes will be saved and only the users remaining on the current user access list will have access to the LTO deposit account listed at the top of the page
   - You can also preview the list to make sure your changes are accurate

Add funds to the account

There are several ways you can add funds to your LTO deposit account:

1. Our top-up service will automatically replenish your LTO deposit account using an electronic transfer of funds when your LTO deposit account reaches you're designated minimum balance. Funds will be pulled from your bank account and transferred to your LTO deposit account at regular intervals . It is recommended that clients consider setting their minimum balance high enough to accommodate peak volumes.
2. Deposit **cash** in person at one of our six land titles offices (do not send cash in the mail).
3. Mail or drop off a **cheque** to one of our offices
   - Don't forget to include the account number in the memo section of the cheque.



4. Use **debit** in person at one of our six land titles offices.

Pay for services

When it comes time to use one of our services, there are many options for paying:

Service	LTO deposit account	PPR deposit account	Credit card	Debit	Cash	Cheque	EFT
DOL	✓		✓				
eRegistration	✓						✓
LTO registrations	✓			✓	✓	✓	
LTO searches (in person)	✓		✓	✓	✓	✓	
PDS	✓						
PPR (in person)		✓	✓	✓	✓	✓	
PPR (online)		✓	✓				
SPO	✓		✓				
TOL	✓						

The benefit of having a deposit account is that your payment will be recorded in the account no matter which method you use to pay. This will ensure your account statements contain a complete record of all transactions. In addition, if the payment provided is short funds, we will use your account to cover the shortfall. A Client File Report is also sent to your account administrator once the series is accepted, discharged or rejected.

A **Client File Report** summarizes all transactions associated to the same file number of a registered series

Refunds

The method we use to issue refunds will depend on the method of payment originally provided and whether you have a deposit account:

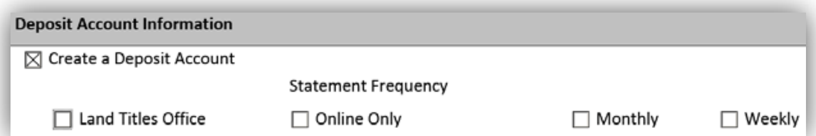
Original payment and refund method

	LTO deposit account	**Credit card**	**Debit**	**Cash**	**Cheque**	**EFT**
✓ **Deposit account**	Deposit account	Credit card	Deposit account			
✕ **Deposit account**	N/A	Credit card	Cheque			N/A

Check the account balance

There are a two ways you can check your LTO deposit account balance:

1. Online statements – The last 31 days can be generated anytime by the account administrator
2. Weekly or monthly statements – These are emailed to the deposit account administrator if the option was selected when you firm completed the Client Application Form


Deposit Account Information

☒ Create a Deposit Account

Statement Frequency

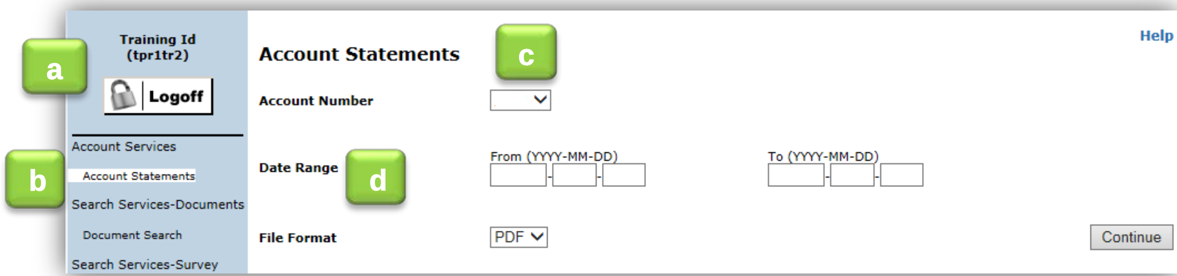
☐ Land Titles Office ☐ Online Only ☐ Monthly ☐ Weekly

Keep in mind that these options are time sensitive. No matter which method you choose, the information is only current as of the time it is reported.

View the account statement

You have the option to view your statements in a two ways:

1. The account administrator can download online statements at any time by following these steps:
    a. Log on to DOL
    b. Select **account statements** from the menu bar
    c. Select your **account number**
    d. Select **transaction history** and enter the **date range** you want to search (file format options are PDF or TSV)

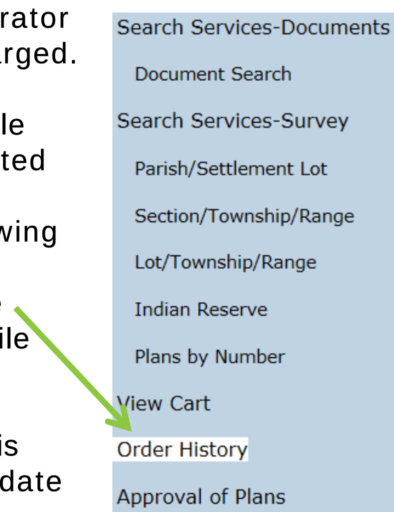


2. Deposit account statements are emailed to the account administrator weekly or monthly if the option was selected when your firm completed the Client Application Form.

View a transaction

There are three ways to view a transaction:

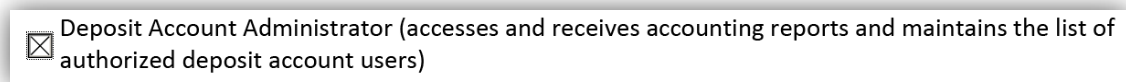
1. eReceipts for every transaction processed through your LTO deposit account are emailed to the account administrator daily.
2. A Client File Report is also sent to the account administrator when a registered series is accepted, rejected or discharged.
    - A Client File Report chronicles all transactions completed by LTO for files with the same client file number, including document registration, requested services and payment.
3. Online transaction history is available through the following online services:
    - DOL and SPO: A 30 day order history is available
    - TOL: Orders remain in your file details until the file expires (120 days after the file creation)
    - PDS: Memos remain in your file details until the associated plan is registered and a plan number is assigned or for five years from the last modified date (whichever occurs first)
    - eRegistration: File remains in your workspace for 7 days after acceptance and 60 days after rejection



Manage your PPR deposit account

You must meet the following requirements to be able to manage your PPR deposit account:

- Have a valid user ID and password for our online services (specifically PPR)
- Be registered as an **account administrator** which will give you the security permissions needed to manage your account (you may identify two account administrators on the Client Application Form)


☒ Deposit Account Administrator (accesses and receives accounting reports and maintains the list of authorized deposit account users)

Account search

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2. Enter your **account number** you wish to search
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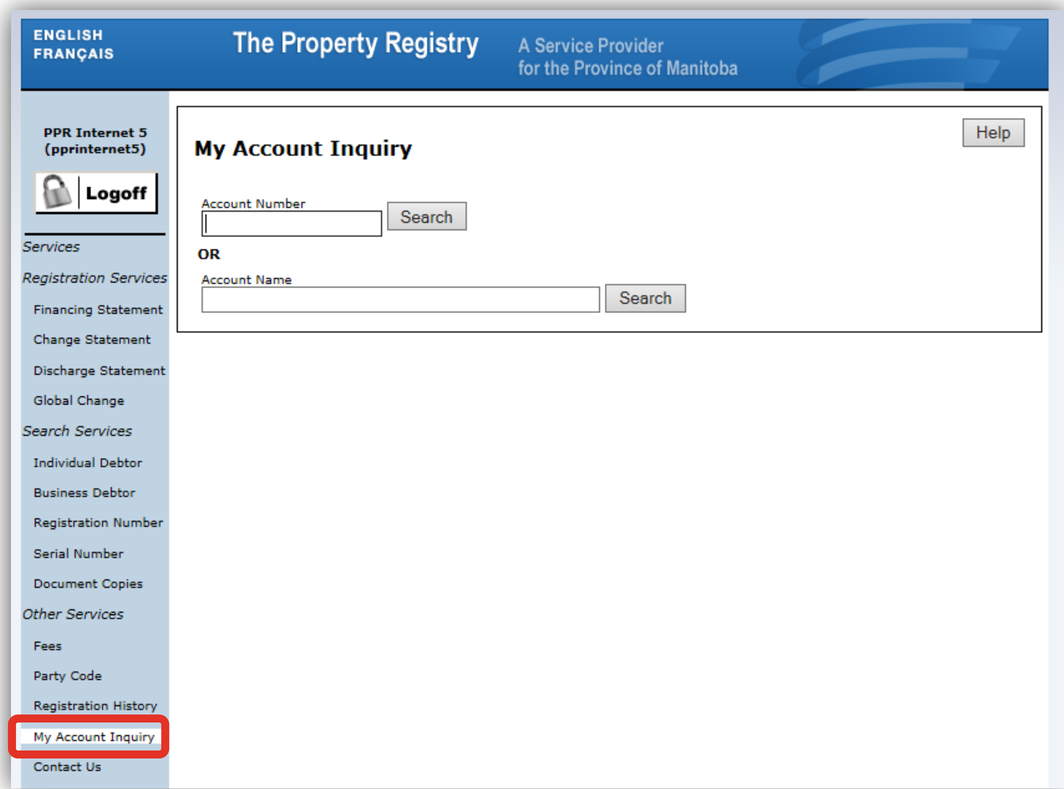

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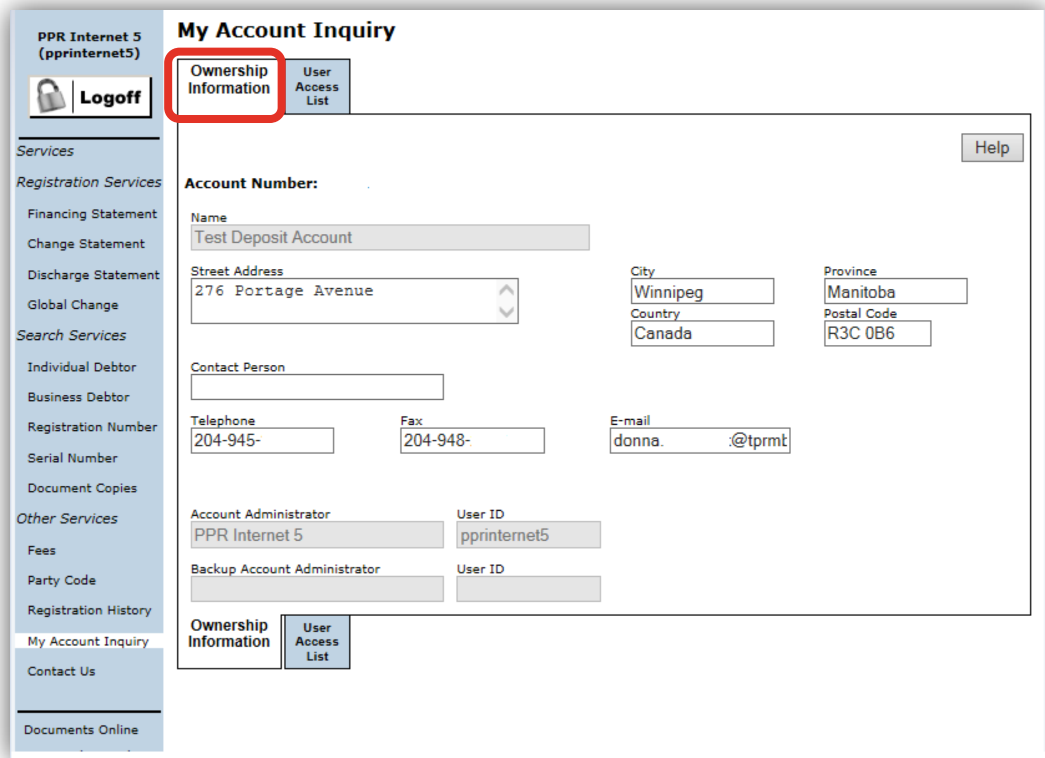

Update user access list

You can also add or remove user access to the PPR deposit account from **my account inquiry**. Account administrators (or backup account administrators) can grant/revoke user access to a PPR deposit account under the **user access list** tab.

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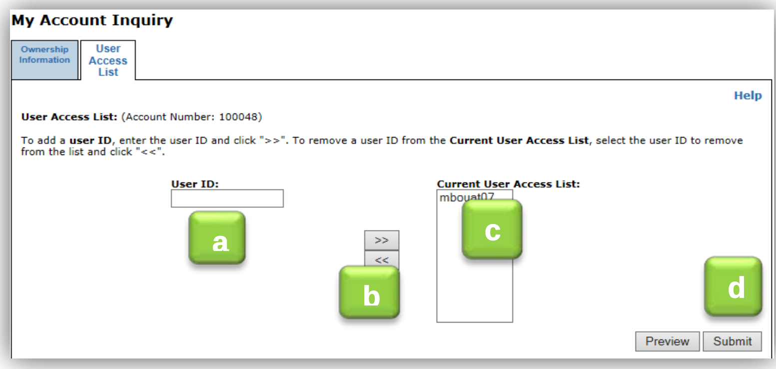

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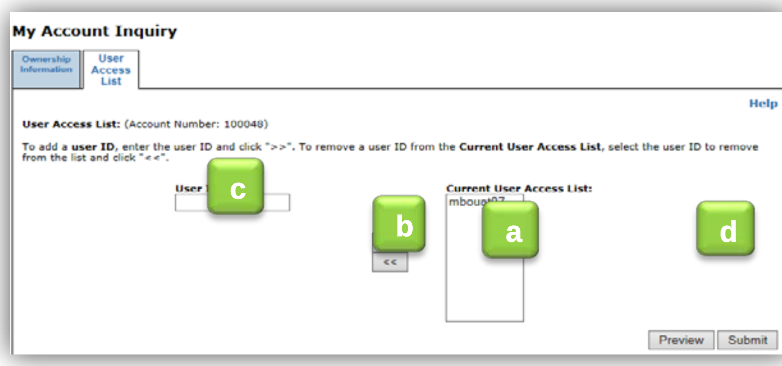

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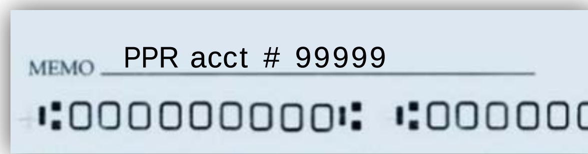
Add funds to the account

There are several ways you can add funds to your PPR deposit account:

1. Deposit **cash** in person at one of our six offices (do not send cash in the mail)
2. Mail or drop off a **cheque** to one of our six offices
   - Don't forget to include the account number in the memo section of the cheque
3. Use **debit** in person at one of our six offices



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eRegistration	✓						✓
LTO registrations	✓			✓	✓	✓	
LTO searches (in person)	✓		✓	✓	✓	✓	
PDS	✓						
PPR (online)		✓	✓				
PPR (in person)		✓	✓	✓	✓	✓	
SPO	✓		✓				
TOL	✓						

Refunds

The method we use to issue refunds will depend on the method of payment originally provided and whether you have a deposit account:

	Original payment and refund method				
	PPR deposit account	Credit card	Debit	Cash	Cheque
✓ Deposit account	Deposit account	Credit card	Deposit account		
✗ Deposit account	N/A	Credit card	Cheque		

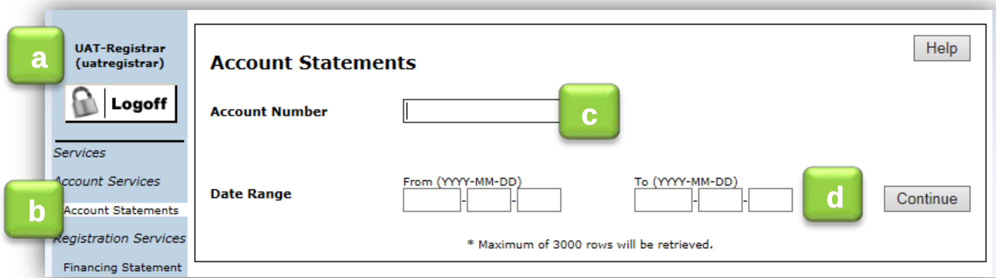
Check the account balance

Your account administrator can check the account balance at any time by generating an online statement. Keep in mind that this statement is time sensitive, and the information is only current as of the time it is reported.

Generating an account statement

The account administrator can follow these steps to generate an account statement:

a. Log on to PPR
b. Select **account statements** from the menu bar
c. Enter your **account number**
d. Select **transaction history** and enter the **date range** you want to search
e. Select **continue** to generate the statement



Questions?

You can find more information and training materials on our website at www.teranetmanitoba.ca.

Please direct any further questions or concerns with regards to account management to our Client Service Team at clientservice@teranet.ca.

Please note: Teranet Manitoba employees cannot answer certain questions due to their legal nature. Where necessary, users should seek independent legal advice or consult with legal staff within their organization as the case may be. Users are advised to ensure that they meet all legal requirements for proper registration. Teranet Manitoba cannot provide legal advice.

Notes