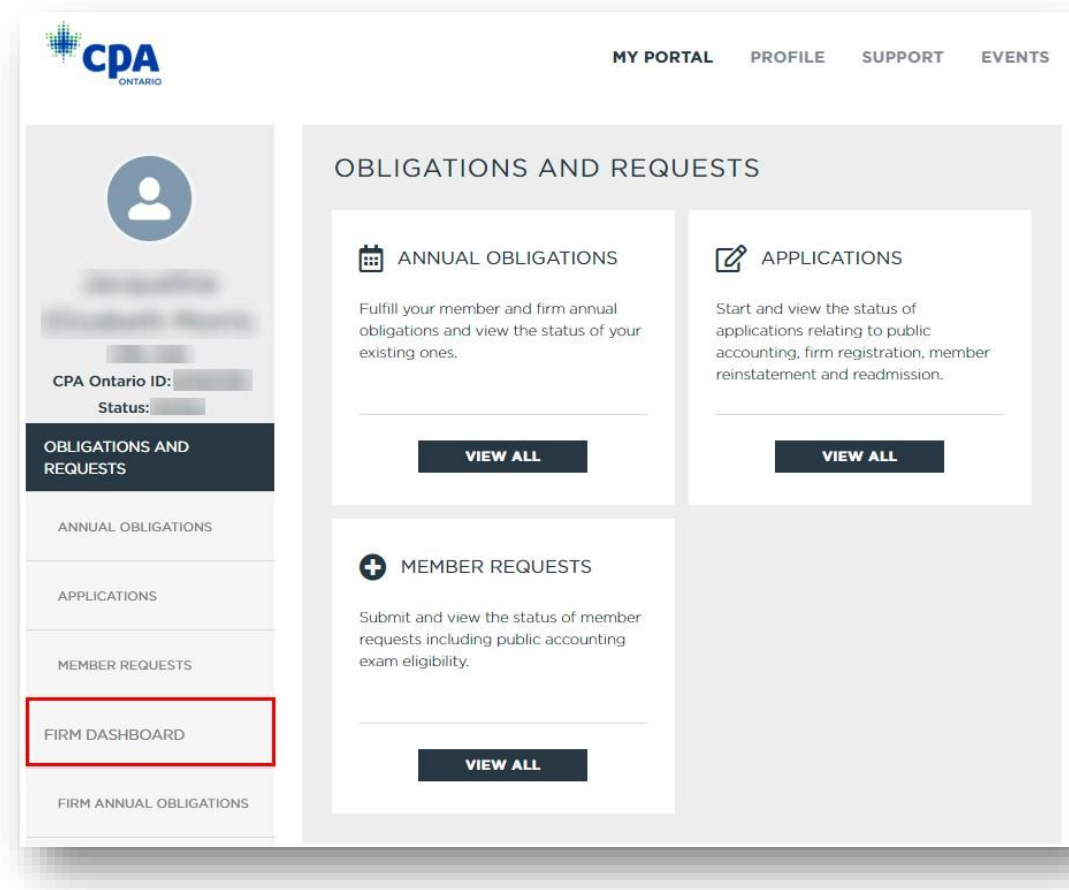




How to Update Your Professional Liability Insurance

1. Log in to [My Portal](#) with your CPA Ontario ID and password. Click **Firm Dashboard**.





2. If you are the Firm Representative of more than one Firm/Firm office, click **Switch Firm**.
Click **View All** under the Professional Liability Insurance tile.

The screenshot shows the CPA Ontario Firm Dashboard. At the top left is the CPA Ontario logo. The top navigation bar includes 'MY PORTAL', 'PROFILE', 'SUPPORT', and 'EVENTS'. On the left is a sidebar menu with options: 'OBLIGATIONS AND REQUESTS', 'ANNUAL OBLIGATIONS', 'APPLICATIONS', 'MEMBER REQUESTS', 'FIRM DASHBOARD' (highlighted), 'FIRM ANNUAL OBLIGATIONS', and 'FIRM APPLICATIONS'. The main content area features a 'SWITCH FIRM' button at the top right. Below it are four tiles: 'ANNUAL OBLIGATIONS', 'APPLICATIONS', 'RELATED BUSINESSES', and 'PROFESSIONAL LIABILITY INSURANCE'. Each tile has a 'VIEW ALL' button. The 'VIEW ALL' button for 'PROFESSIONAL LIABILITY INSURANCE' is highlighted with a red box.



3. Click **Update Insurance Information** to submit your insurance information.

The screenshot shows the CPA Ontario member portal. The top navigation bar includes 'MY PORTAL', 'PROFILE', 'SUPPORT', and 'EVENTS'. On the left, a sidebar contains a profile card for 'Elizabeth Harris' with fields for 'CPA Ontario ID' and 'Status', and a list of menu items: 'OBLIGATIONS AND REQUESTS', 'ANNUAL OBLIGATIONS', 'APPLICATIONS', 'MEMBER REQUESTS', and 'FIRM DASHBOARD'. The main content area shows a 'SWITCH FIRM' button and a table of insurance information. The 'UPDATE INSURANCE INFORMATION' button is highlighted with a red box and a mouse cursor. The table contains three rows of insurance data, each with a 'View More' link.

Account Name	Coverage Type	Name Of Policy Holder	Policy Holder CPA ID
[REDACTED]	Ongoing	[REDACTED]	[REDACTED]
[REDACTED]	Ongoing	[REDACTED]	[REDACTED]
[REDACTED]	Ongoing	[REDACTED]	[REDACTED]

4. Click **Next** on the Instructions & Requirements page.

The screenshot shows the 'INSTRUCTIONS & REQUIREMENTS' page for 'NEW INSURANCE'. At the top, a progress bar indicates the current step is 'Instructions', followed by 'Insurance Information', 'Review', and 'Finish'. The main heading is 'INSTRUCTIONS & REQUIREMENTS' with the sub-heading 'NEW INSURANCE'. Below this, a paragraph states: 'The minimum professional liability insurance limits of liability are:'. This is followed by a bulleted list: '\$1 million for a Firm with one Member; or', '\$1.5 million for a Firm of two or three Members; or', and '\$2 million for a Firm of four or more Members.'. A 'NEXT' button is located at the bottom right, highlighted with a red box and a mouse cursor.



5. Select the following if applicable:

- **Ongoing** - your Firm is active and still operating
- **Discovery** - your Firm is closed and are in the 6-year extended reporting period
- **Coverage Held Directly** – The current Firm is the policy holder
- **Covered by Another Firm** – Another Firm is the policy holder

The screenshot shows the CPA Ontario website interface for the 'NEW INSURANCE' section. At the top, there is a navigation bar with 'MY PORTAL', 'PROFILE', 'SUPPORT', and 'EVENTS'. Below this is a progress bar with four stages: a green bar with a checkmark, 'Insurance Information', 'Review', and 'Finish'. The main heading is 'INSURANCE DETAILS' followed by 'NEW INSURANCE' and 'INSURANCE DETAILS'. Underneath, there is another 'INSURANCE DETAILS' heading. The form contains two sections: '*Type of Coverage' and '*Source of Coverage'. Each section has radio button options with corresponding text boxes. The 'Ongoing' option is selected, and its text box contains 'Active Firms with PLI'. The 'Discovery' option is also present with a text box containing 'Firms that have closed and have discovery insurance or an extended reporting period'. In the '*Source of Coverage' section, the 'Coverage held directly' option is selected, with a text box containing 'The current Firm is the policy holder'. The 'Covered by another firm' option is also present with a text box containing 'Another Firm is the policy holder'. At the bottom of the form, there are two dark blue buttons labeled 'BACK' and 'NEXT'.

CPA ONTARIO

MY PORTAL PROFILE SUPPORT EVENTS

Insurance Information Review Finish

INSURANCE DETAILS

NEW INSURANCE

INSURANCE DETAILS

INSURANCE DETAILS

*Type of Coverage

Ongoing

Discovery

*Source of Coverage

Coverage held directly

Covered by another firm

BACK NEXT



6. a) Covered by Another Firm

Look up the Firm that is covering your Firm's insurance. The name you look up must match the name that is registered with CPA Ontario. If you are searching a specific firm office, separate the firm name and city with a comma, ex. ABC LLP, Essex.

***Source of Coverage**

Coverage held directly

Covered by another firm

*** [Required] Account Name of Policy Holder** • Look up the Firm that's covering the insurance

***Effective Date of the Policy**

***Expiry Date of the Policy**

***Number of Members in the Firm**

1 Member

2-3 Members

4 or more Members



6. b) Coverage Held Directly

Please indicate the insurance provider and their contact information. This information is required. You may also indicate the broker information, if applicable. The broker information are not require fields.

Limit liability per claim, Minimum aggregate limit and deductible amount: These fields will not accept special characters and punctuation marks. Please indicate the amounts without a dollar sign, commas and decimals.

<p>*Source of Coverage</p> <p><input checked="" type="radio"/> Coverage held directly</p> <p><input type="radio"/> Covered by another firm</p>
<p>*Insurance Provider</p> <p>--Select a Value--</p>
<p>*Insurance Provider Phone Number</p> <p></p>
<p>*Insurance Provider Address</p> <p></p>
<p>Broker Name</p> <p></p>
<p>Broker Phone</p> <p></p>
<p>Broker Address</p> <p></p>
<p>*Policy Number</p> <p></p>
<p>*Limit of Liability per Claim Number values only. No symbols or commas</p> <p></p>

*Minimum Aggregate Limit Per Year Number values only. No symbols or commas

*Deductible Amount Number values only. No symbols or commas

*Jurisdiction

- Ontario
- Canada
- North America

*Effective Date of the Policy



*Expiry Date of the Policy



*Number of Members in the Firm

- 1 Member
- 2-3 Members
- 4 or more Members

BACK

NEXT



7. Review your form before submitting. Check off the **attestation box** and then click **Submit**.

REVIEW DETAILS

NEW INSURANCE
REVIEW DETAILS

INSURANCE DETAILS

Type of Coverage
[Redacted]

Source of Coverage
[Redacted]

Account Name of Policy Holder
[Redacted]

Effective Date of the Policy
[Redacted]

Expiry Date of the Policy
[Redacted]

Number of Members in the Firm
[Redacted]

1 **ATTESTATION**

I declare that: The information I have provided is accurate, true, and complete. I understand and agree I am bound by the by-laws and Regulations of CPA Ontario, and I will promptly provide any further information or documentation requested by CPA Ontario.

△ Complete this field.

To review the by-laws and regulations for Professional Liability Insurance, click here <https://media.cpaontario.ca/stewardship-of-the-profession/pdfs/Regulation-14-1.pdf>.

2 **BACK** **SUBMIT**