

# Delegating Authority within FCT Platforms



## DELEGATION OVERVIEW

A delegate is an individual who is acting on behalf of a lawyer/notary. This may include law clerks, legal assistants, conveyancers or another lawyer/notary.

### Law clerks, legal assistants and conveyancers require delegation to access:

- Lender Lawyer Connect (LLC)
- Managed Mortgage Solutions (MMS)
- Payout Services
- EasyFund
- Client ID Verification

### Delegation is not required to order title insurance online through:

- Residential Title Insurance Services (RS)
- Commercial Title Insurance (CS)

**Note:**

Although delegation is not required to access these platforms, law clerks, legal assistants and conveyancers who are not set up as delegates only have access to their own files within the residential and commercial online portals, rather than all files of a delegated lawyer/notary.

## HOW TO ADD A DELEGATE

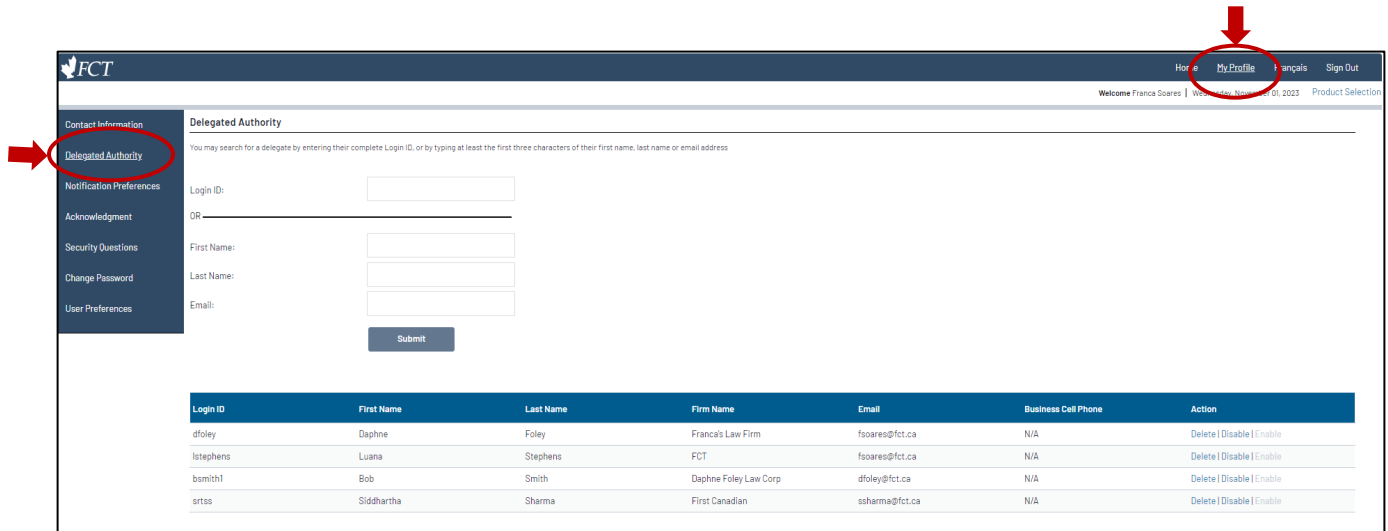
There are two ways that a lawyer/notary can add a delegate.

### 1) Add a delegate through your FCT online profile.

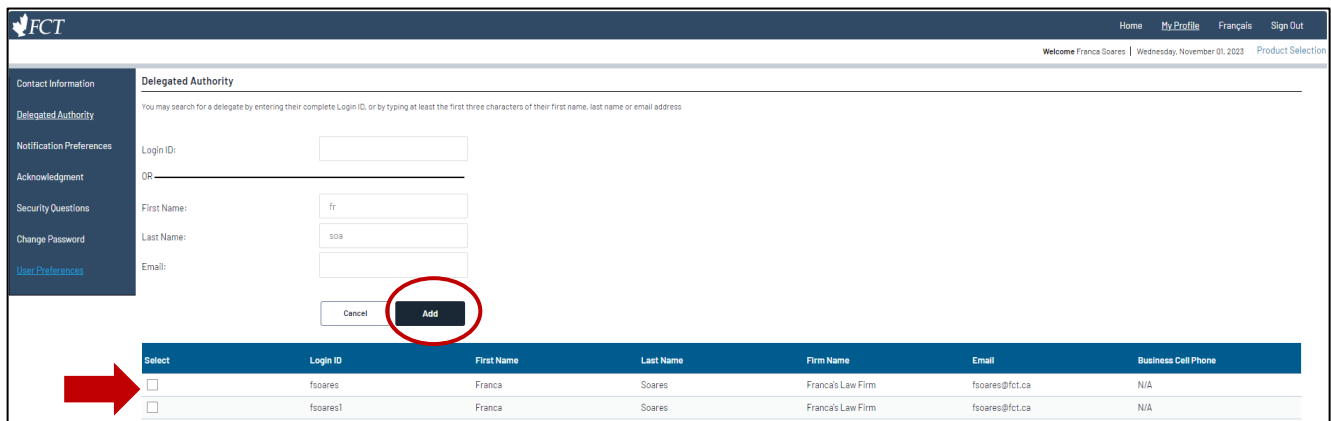
- Select **My Profile** from the drop-down menu in the top right corner of the page. Lawyer/notary will be directed to their profile information.
- Select **Delegated Authority**, from the left menu.
- Enter the Login ID of the individual that will be added as a delegate.
  - The delegate's Login ID would have been emailed to them upon enrollment.
  - Login ID must be used to delegate any freelance employees (i.e. individuals who do not have a law firm email address domain or operate a business outside the delegating lawyer's firm).

**OR**

- Search by First Name, Last Name or Business email address of the individual who will be added as a delegate.
  - Type in at least the first three characters in any one of these fields to display results for employees within your firm.
  - Select **Submit**.



- Verify that the details displayed for the delegate are correct and select **Add**.



**The first delegate has now been successfully added. Follow the same steps to add more delegates.**

A lawyer/notary may grant access to multiple delegates. Similarly, a law clerk, legal assistant, or conveyancer may be set up as a delegate to multiple lawyer/notaries.

- Click **Home** in the top right menu to return to the dashboard.

## 2) Contact FCT to add a delegate

- Call or email FCT with the full name of your delegate authority request(s). You will find FCT's business contact information on the last page of this document.
  - FCT will confirm your request via email. The lawyer/notary will be required to respond to this email with their consent for audit tracking purposes.
- When FCT enables your delegate(s), you will receive an email notification confirming that the delegate(s) have been successfully added.

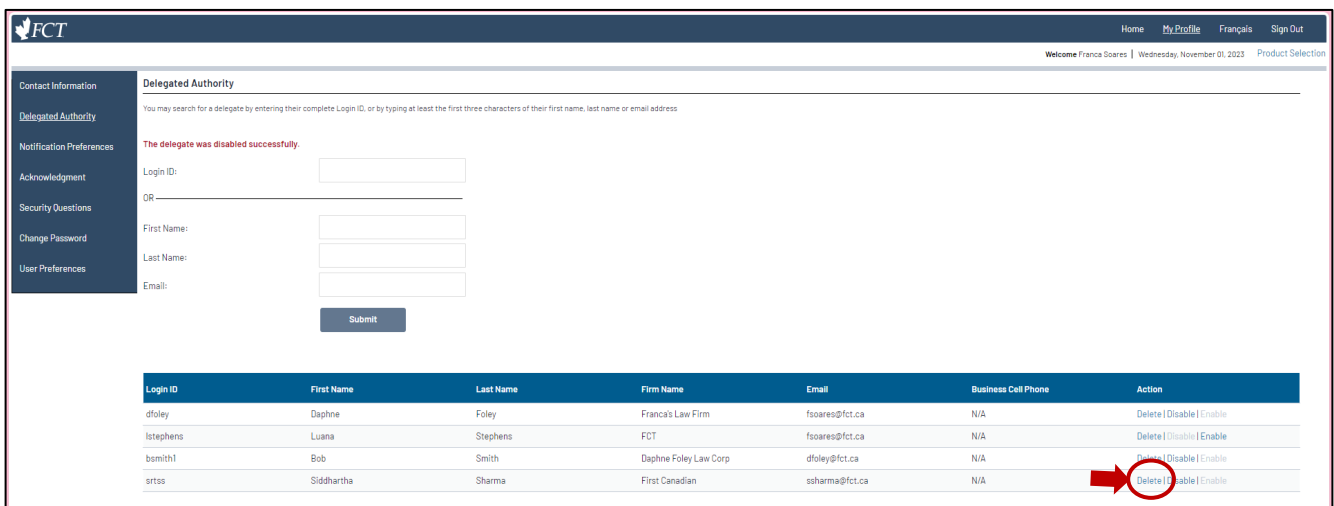
## MANAGING & REMOVING DELEGATES

Once added successfully, lawyers/notaries can view and manage delegates in their Delegated Authority list.

To remove a Delegated Authority when they are no longer working with you, select **Delete** under the Action column. We recommend you delete your Delegated Authority from contacts no longer at your firm to ensure they do not have access to your files. You will still be able to access any files managed by your delegate(s), even if you delete them from your Delegated Authority list.

Select **Disable** under the Action column to remove a delegate's access temporarily. The delegate will remain in your list and you will be able to enable the delegate in future.

FCT can also disable or delete a delegate on behalf of a lawyer or notary upon request from the lawyer/notary. Please call or email us for assistance.



The screenshot displays the 'Delegated Authority' management page. At the top, there is a search bar with the text: 'You may search for a delegate by entering their complete Login ID, or by typing at least the first three characters of their first name, last name or email address'. Below the search bar, a message states: 'The delegate was disabled successfully.' There are input fields for 'Login ID', 'First Name', 'Last Name', and 'Email', along with a 'Submit' button. Below the search form is a table of delegates:

Login ID	First Name	Last Name	Firm Name	Email	Business Cell Phone	Action
dfoley	Daphne	Foley	Franca's Law Firm	fsoares@fct.ca	N/A	Delete   Disable   Enable
lstephens	Luana	Stephens	FCT	fsoares@fct.ca	N/A	Delete   Disable   Enable
bsmith1	Bob	Smith	Daphne Foley Law Corp	dfoley@fct.ca	N/A	Delete   Disable   Enable
srtss	Siddhartha	Sharma	First Canadian	ssharma@fct.ca	N/A	Delete   Disable   Enable

A red arrow points to the 'Delete' button in the 'Action' column for the delegate 'srtss'.

## CONTACT FCT

Please contact us if you require assistance completing the delegate set up.

We're here to help Monday to Friday from 8:00 a.m. (ET) to 8:00 p.m. (ET).

- Lawyer Lender Connect, Managed Mortgage Solutions and Payout Services technical support: 905.287.2393 | 1.877.929.0990 | [LLCSupport@fct.ca](mailto:LLCSupport@fct.ca)
- Residential Title Insurance: 905.287.3122 | 1.866.804.3122 | [RTISProcessing@fct.ca](mailto:RTISProcessing@fct.ca)
- Commercial Title Insurance: National: 905.287.3112 | 1.866.804.3112 | [commercialsolutions@fct.ca](mailto:commercialsolutions@fct.ca)
- Client ID Verification: 905.287.2969 | 1.833.672.0151 | [ContactIDverification@fct.ca](mailto:ContactIDverification@fct.ca)
- EasyFund available in Nova Scotia only: 905.645.5206 | 1.877.313.0505 | [Easyfundsupport@fct.ca](mailto:Easyfundsupport@fct.ca)