

# **Task Guide**

## **Portal Licensing**

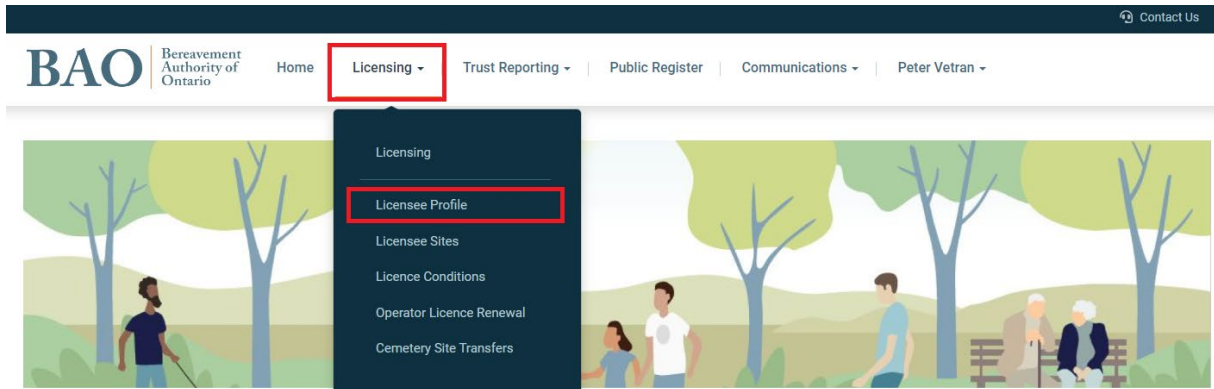
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# 1. Licensee Profile

## 1.1 Navigate to Licensee Profile

From the homepage of the Portal, you can click on the 'Licensing' section of the main banner heading near the top of the page, and then click on 'Licensee Profile' to navigate to the Licensee Profile page.



## 1.2 Review and Edit Licensee Profile

On the Licensee profile page, you will be able to see the information about the business and will be able to review and update certain information. If any updates are made, you can click on the 'Submit' button at the bottom of the page to save the changes.

Contacts

Full Name *	Email	Business Phone	License Status	License Number	License Class	
Peter Vetran	Peter.Vetran@gmail.com	877914082	Expired	FD1-0025312	Funeral Director - Class 1	Details >
Jessica Pearson	JessicaPearson@gmail.com	877914082	Expired	FD1-0001001	Funeral Director - Class 1	Details >
			Not Licensed			Details >

Executive & Employees

Situation	Full Name *	Contact Type	Business Phone	License Status	License Class	License Effective Date	License End Date	
Mo.	Jessica Pearson		877914082	Expired	Funeral Director - Class 1			Details >

Shareholders

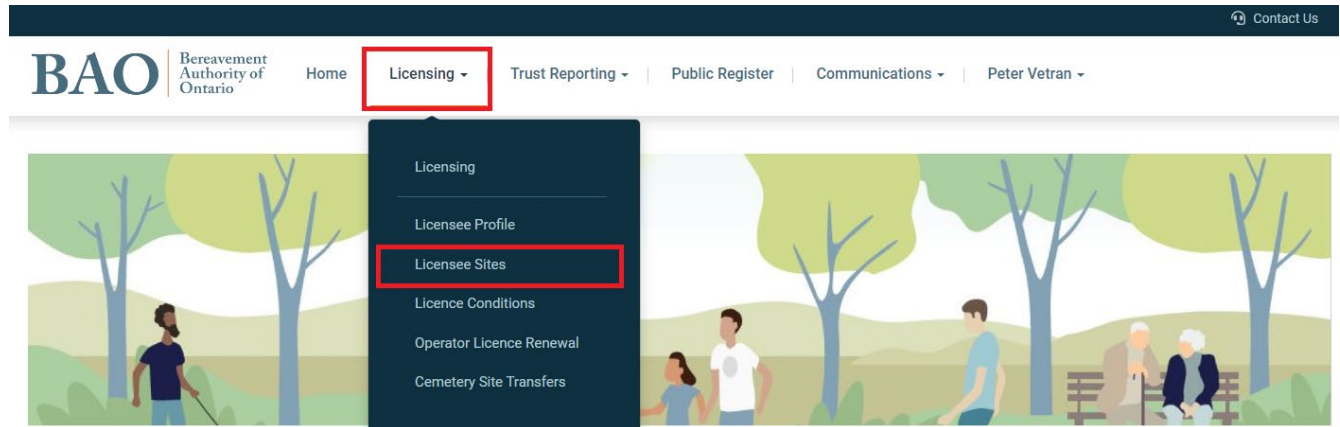
Full Name *	From Date	To Date	Ownership Percentage %	License Effective Date	License End Date
There are no records to display.					

Submit

## 2. Licensee Sites

### 2.1 Navigate to Licensee Sites

From the homepage of the Portal, you can click on the 'Licensing' section of the main banner heading near the top of the page, and then click on 'Licensee Sites' to navigate to the Licensee Sites page.



### 2.2 View Sites

On the 'Licensee Sites' page you will see a table that lists all of your Sites and their status.

To view the details of a Site, click on the 'Details' section on the right-hand side of the table.

[Home](#) » [Licensing](#) » [Licensee Sites](#)

#### Licensee Sites

Below is a list of sites operated by **Arbor Memorial [OUTDATED]**. Please review the list, and if any information needs to be corrected, create a case as follows: click on **Communications** above, then **Cases and Support**, and then **Create New Case**. Select "Operator Licensing" from the **Case Category** field and then the applicable **Case Type**. If you happen to select the incorrect Case Type, not to worry - we will still receive your case request, and we will modify it on our end.

##### Change Existing Site Manager Position(s):

If you wish to add an employment record for a new Site Manager (aka "person in charge of day-to-day operations"), or change an existing Site Manager record, please email your request to [Licensing@thebao.ca](mailto:Licensing@thebao.ca) or simply create a new case as described above, with "Personal Licensing" as the **Case Category** and "Request to Change Manager" as the **Case Type**. Your request will be reviewed and responded to by the BAO's Licensing Department within five (5) business days of submission.

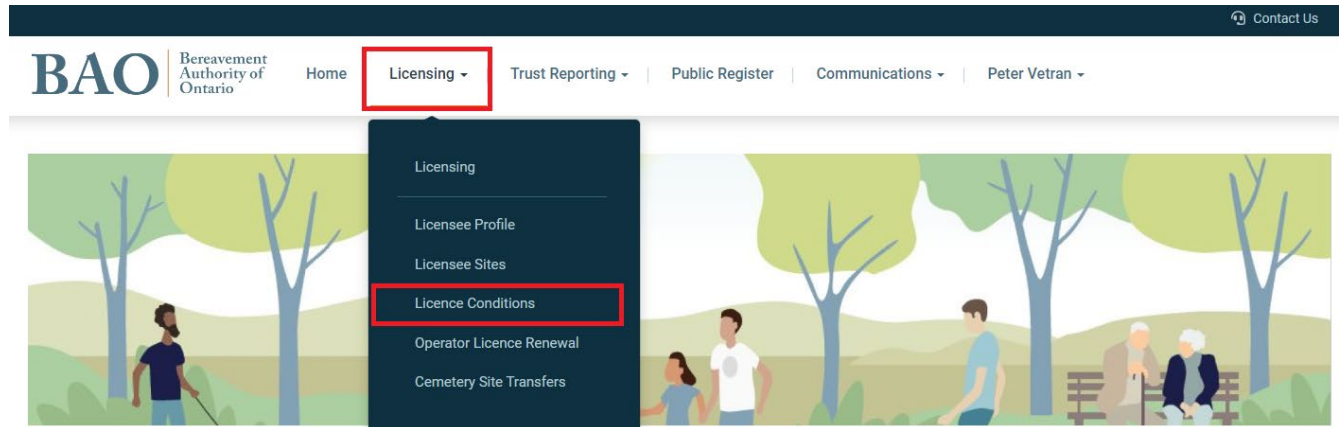
Business Name	Email	Main Phone	Street Address	Site Manager	Licence Status	Licence Number	
New TSO1 - Finance Test Nov 24	arborsite1@gmail.com	155-259-2548	Stree no. 2, Main Building CA		Active	CR-0001017	Details >
Another Site 2	tso2@gmail.com	125-152-4859	Street no. 3, Main Building CA		Active	CR-0001021	Details >

You will be taken to the Details page for the Site where you can review the information about the Site as well as Individuals from your organization who are associated with it. If there are any Conditions or Inspections for the site, you can find that information on the Details page.

### 3. Licence Conditions

#### 3.1 Navigate to Licence Conditions

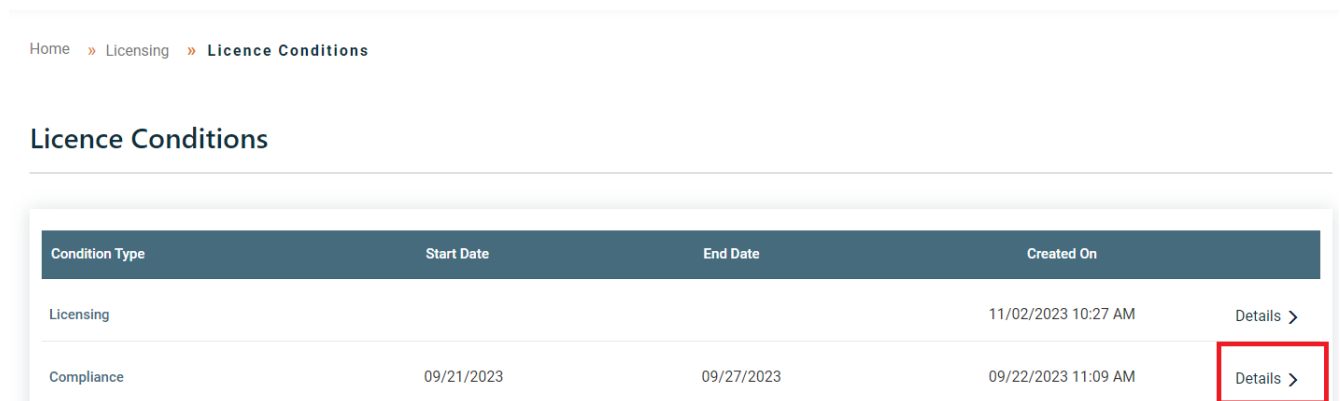
From the homepage of the Portal, you can click on the 'Licensing' section of the main banner heading near the top of the page, and then click on 'Licence Conditions' to navigate to the Licence Conditions page.



#### 3.2 Review Licence Conditions

On the 'Licence Conditions' page you will see a table that lists all of your licence conditions and their applicable start and end dates.

To review the specifics of a Conditions, click on the 'Details' section on the right-hand side of the table.

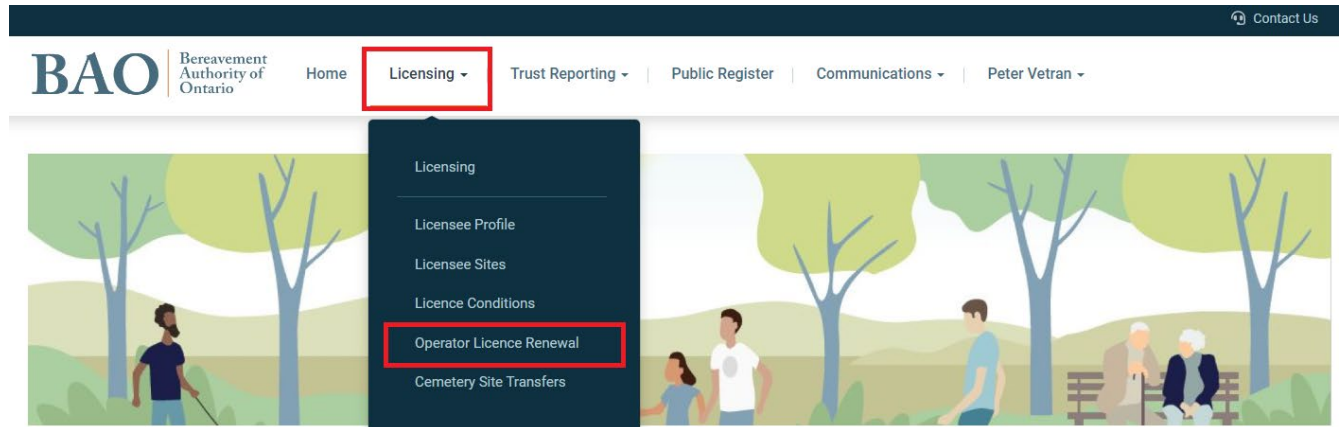


You will be taken to the Details page which will provide more information about the Licence Condition. For any questions or clarifications about any conditions on your Licence you may contact the BAO.

## 4. Operator Licence Renewal

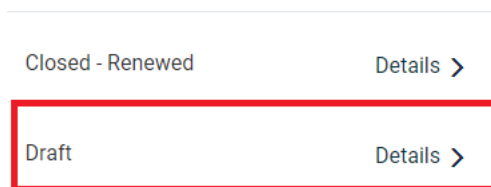
### 4.1 Navigate to Operator Licence Renewals

From the homepage of the Portal, you can click on the 'Licensing' section of the main banner heading near the top of the page, and then click on 'Operator Licence Renewals' to navigate to the Operator Licence Renewals page.



### 4.2 Completing your Operator Licence Renewal

Before renewing your licence, please review the Licensee Profile, Executive and Shareholder information, and the list of Sites associated with the Operator organization and update as needed. Once you have updated the above pages you can review and find the relevant Licence Renewal on the page. The Licence Renewals will be generated and available on the Portal once it is time to renew. When you find the relevant renewal, which should have a 'Draft' status, you may click on 'Details' to begin processing your renewal application.



On the renewal details page you will be able to view and add comments to communicate with the BAO regarding the renewal application.



## Operator Licence Renewal

General Site Activities Invoice

### General

Licence Renewal No.  
LRN-01061

Licence Renewal Type \*  
CEM/CREM/AH

Licensee \*  
Arbor Memorial [OUTDATED]

Licence Effective Start Date  
04/01/2024

Licence Effective End Date  
03/31/2025

Disposition Code  
Draft

### Site Activity Statistics

Full Body Interments 6	Hydrolysis Processes 0
Scatterings 12	Cremation Interments 43
Crematorium Cremations 81	
Total Activity 142	Total Fee Required \$4,260.00

Timeline

[Add comment](#)

There are no activities to display.

You can fill out and confirm the information on your Licence Renewal and make the declarations. Once you have added all relevant details you can click on the 'Next' button to go to the Site Activities page.

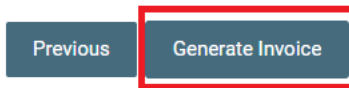
- I confirm that the Licensee Profile page for the licensed operator is up to date.
- I confirm that the Executive and Shareholder information for the licensed operator and any holding companies is up to date.
- I confirm that the manager information for each site is correct.
- I confirm that the address information for all cemetery sites is up to date, and that where an exact address is not available, a best-possible description of the address has been entered.

[Next](#)

On the Site Activities tab of the Operator Licence Renewal, you can review and Edit the information pertaining to each of the sites linked with the organization.

Site Licence No.	Site Name	Site Street Address	Site Manager	Cremation Interments	Crematorium Cremations	Full Body Interments	Hydrolysis Processes	Scatterings
CR-0001017	New TS01 - Finance Test Nov 24	Stree no. 2, Main Building CA						<a href="#">Edit &gt;</a>
CR-0001021	Another Site 2	Street no. 3, Main Building CA						<a href="#">Edit &gt;</a>

Once all Sites have been updated then you can proceed to the invoice payment by clicking on the 'Invoice' button at the bottom of the page. Once you have generated the invoice you will not be able to edit the Site Activities.



On the Invoice tab of the Operator Licence Renewal you can click on the 'Details' section of the Invoice to open up the invoice for payment.

Home » Licensing » Operator Licence Renewals » **Operator Licence Renewal**

### Operator Licence Renewal

Please click on Details button in below grid to view renewal Invoice.

General ✓ Site Activities ✓ **Invoice**

Invoice ID	Total Amount	Status	Created On ↓	
INV-30659-M1D2J6	\$4,260.00	Active	02/15/2024 3:29 PM	<a href="#">Details &gt;</a>

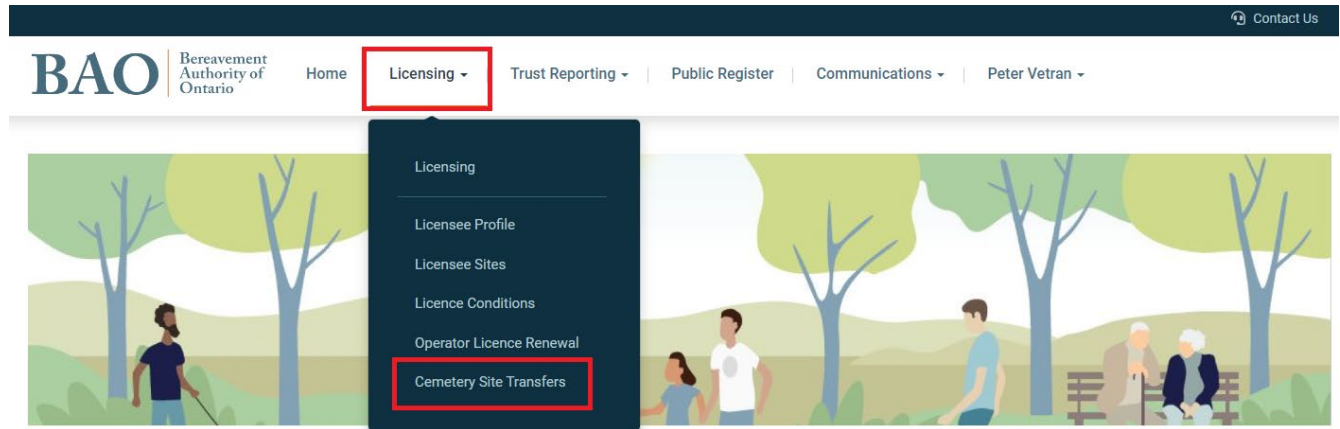
[Previous](#)

If paying by Credit Card, you can click on the PayPal button to process the payment. If paying by Cheque or Money Order please follow the directions provided on the screen and send the payment to the BAO promptly.

## 5. Cemetery Site Transfers

### 5.1 Navigate to Cemetery Site Transfers

From the homepage of the Portal, you can click on the 'Licensing' section of the main banner heading near the top of the page, and then click on 'Cemetery Site Transfers' to navigate to the Cemetery Site Transfers page.



### 5.2 Create a new Cemetery Site Transfer

To create a new Cemetery Site Transfer, click on the 'New Cemetery Site Transfer' button on the page.

Home » Licensing » Cemetery Site Transfers

#### Cemetery Site Transfers

A screenshot of the 'Cemetery Site Transfers' page. At the top right, there is a button labeled 'New Cemetery Site Transfer' which is highlighted with a red box. Below the button is a table with the following columns: 'Site Transfer No.', 'Transferee', 'Cemetery Site Name', 'Transferor', 'Disposition Code', and 'Created On'. The table contains two rows of data.

Site Transfer No.	Transferee	Cemetery Site Name	Transferor	Disposition Code	Created On
CST-01011	Hope County [TEST]	Whitehorse Cemetery	Arbor Memorial [OUTDATED]	Received	11/24/2023 4:17 PM
CST-01009	Hope County [TEST]	Whitehorse Cemetery	Arbor Memorial [OUTDATED]	Under Manager Review	11/23/2023 1:16 PM

On the transfer request page, you can input the details of the transfer including the transferor, transferee, and the cemetery site. You can also attach relevant supporting

documents to the application. Once all details have been added and all documents attached, you can click on the 'Submit' button.

Home » Licensing » Cemetery Site Transfers » **New Cemetery Site Transfer Request**

## New Cemetery Site Transfer Request

**General**

Site Transfer No.

**Transferor**

Transferor \*

Arbor Memorial [OUTDATED]

**Cemetery Site Details**

Cemetery Site Name

**Transferee**

Transferee \*

Transferee Details

Attach a file

Click here to upload file

Submit

### 5.3 Review Cemetery Site Transfers

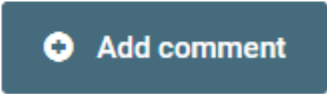
On the Cemetery Site Transfer page, you can view all of your previous and current transfers in a table including their status. To see more information about a transfer request you can click on the 'Details' section on the right-hand side of the table.

New Cemetery Site Transfer

Site Transfer No.	Transferee	Cemetery Site Name	Transferor	Disposition Code	Created On ↓	
CST-01011	Hope County [TEST]	Whitehorse Cemetery	Arbor Memorial [OUTDATED]	Received	11/24/2023 4:17 PM	<a href="#">Details &gt;</a>
CST-01009	Hope County [TEST]	Whitehorse Cemetery	Arbor Memorial [OUTDATED]	Under Manager Review	11/23/2023 1:16 PM	<a href="#">Details &gt;</a>

On the details page you can review the information and communicate with the BAO by clicking on the 'Add comment' button.

## Timeline

 Add comment