

# CAO Guide to Returns: Troubleshooting



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#### Have a Question?

If you have a question about any of the information in this Guide, please contact us. We have a team available to answer any questions you may have.

This guide may be updated from time to time. You can access the most up-to-date version on the CAO website.

Date: April 11, 2024

### Missing Officer Role for a Director

#### **Error Message**

Board of Directors: You did not provide an officer role for the following director(s):

John Smith (directorjohn2020@gmail.com)

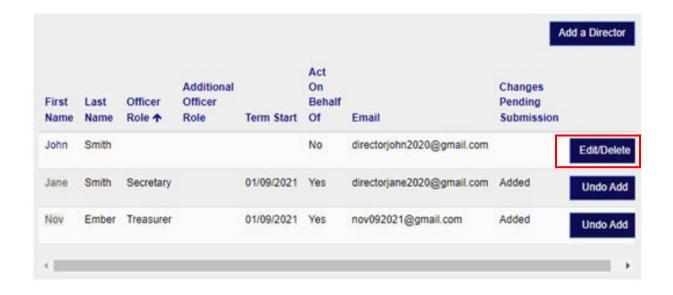
You must specify the officer role of all directors. Please provide the officer role for this/these director(s) by clicking "Edit/Delete" beside their name and then selecting "Edit".

#### **Description**

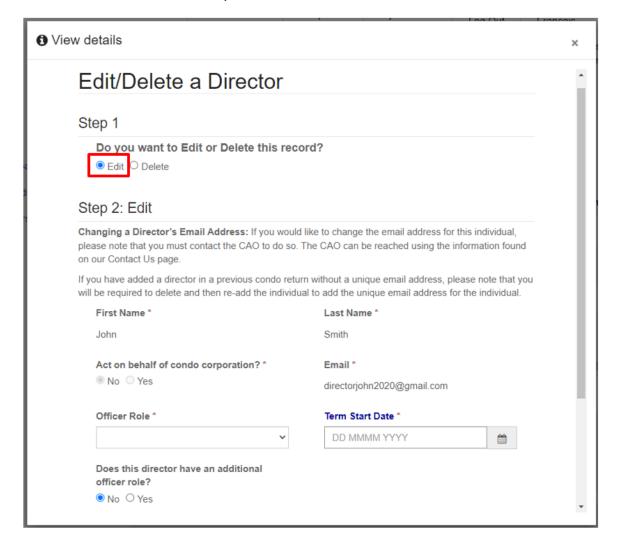
Each director may be assigned an officer role unless they do not have one, in which case "No Officer Role" must be selected. If no option is selected, this error will appear.

#### **Troubleshooting Steps**

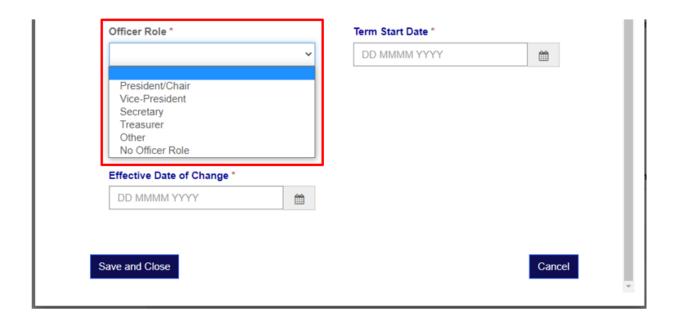
1. In the "Board of Directors" table, click on the "Edit/Delete" button to the right of the director's name.



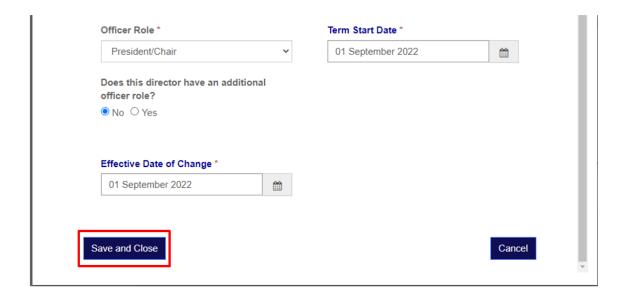
#### 2. Select "Edit" under Step



3. Click on the "Officer Role" drop-down list and select the director's officer role.



4. Click on the "Save and Close" button



### Failure to Complete Director Training by Deadline

#### **Error Message**

Board of Directors: Based on the information provided, the following individual(s) may have ceased to be director(s) for not completing the mandatory director training within the six-month period following their term start date(s) and must be removed:

Jane Smith (directorjane2020@gmail.com)

Please confirm with the director(s) whether they have completed their director training using a different email address than the one provided. If so, please delete and re-add the director(s) with the first name, last name, and email address as they appear on their CAO personal profile. Furthermore, please ensure that the most recent term start date(s) are entered for all directors (the date of their most recent election, re-election, or appointment).

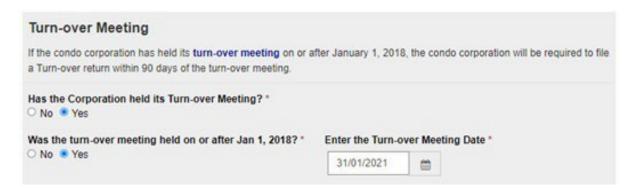
#### **Description**

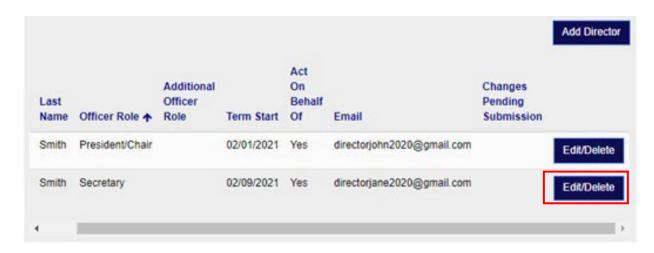
Directors are required to complete the director training program provided by the CAO within six months of the date of their appointment, election, or re-election.

If you see the error message for directors who completed the director training on time, you may need to delete and re-add the director with the first name, last name, and email address they used to create their CAO account and complete the training. If the director previously provided a different email address than the one with which they completed the training, their training will not be linked to their condominium corporation profile.

#### **Troubleshooting Steps**

1. Under the "Turn-over Meeting" section, ensure that the correct turn-over meeting date is entered if the turn-over meeting was held on or after Jan 1, 2018. If the turn-over meeting was held before Jan 1, 2018, select "No" under "Was the turn-over meeting held on or after Jan 1, 2018?".





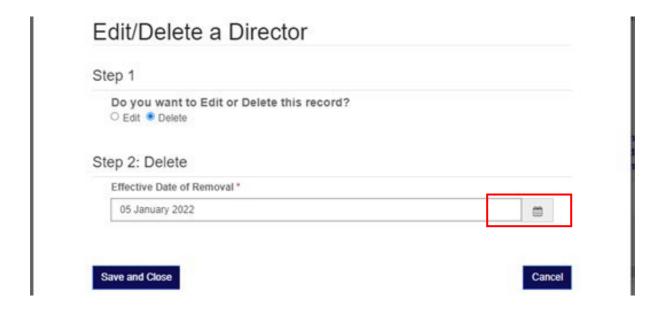
Alternatively, if you have just added the director, click on the "Undo Add" button to the right of the director's name. This will remove the director from the "Board of Directors" table. If you have removed the director, skip to step 6.



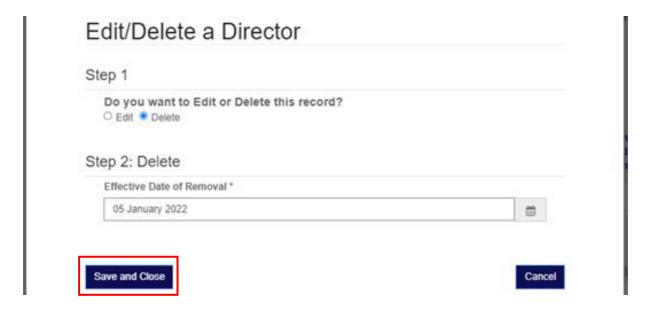
3. Select "Delete" under Step 1.



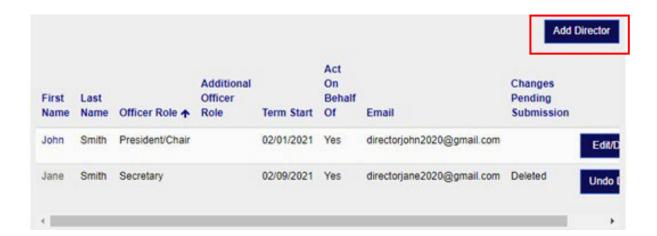
**4.** Enter the "Effective Date of Removal" by selecting the calendar icon and choosing a date from the options which appear.



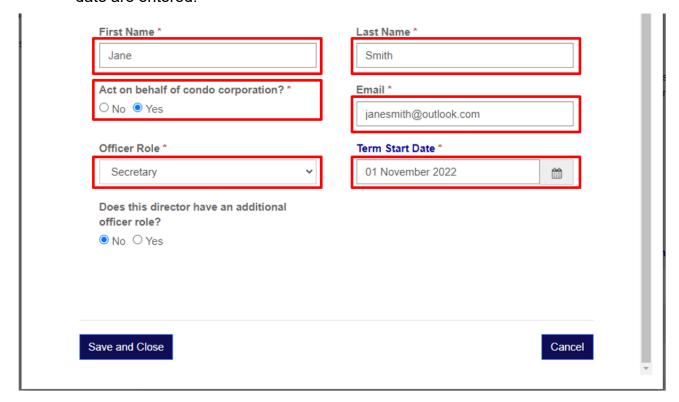
**5.** Click on the "Save and Close" button.



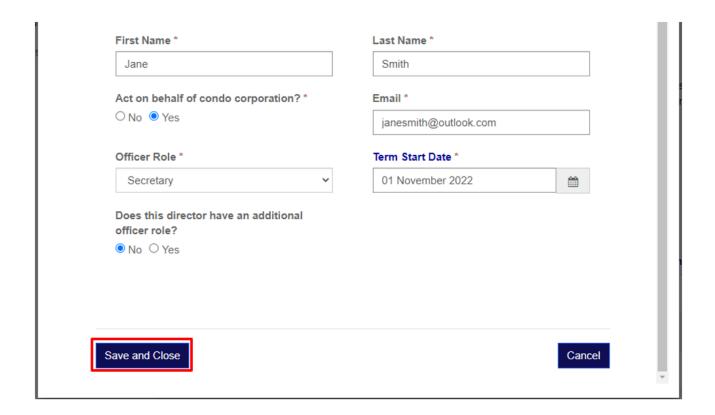
**6.** In the "Board of Directors" table, click on the "Add Director" button.



7. Add the director's first name, last name, and email address as it appears on their CAO account used to complete the director training. This ensures that their completed training is linked to the condominium corporation. Additionally, ensure the officer role, "act on behalf of" privileges, and most recent term start date are entered.



8. Click on the "Save and Close" button.



# Director's Term Start Date Exceeds the Maximum Term of Three Years

#### **Error Message**

Board of Directors: The term start date(s) provided indicate that the term for one or more directors exceeds the maximum term of three years:

John Smith (directorjohn2020@gmail.com)

You have also indicated that an AGM has been held since the expiry of these term(s). Elections to fill such expired positions often happen at AGMs.

Please confirm that the term start date(s) provided are correct and that you have provided the most recent term start dates for these director(s) (the most recent date on which they were elected, or appointed).

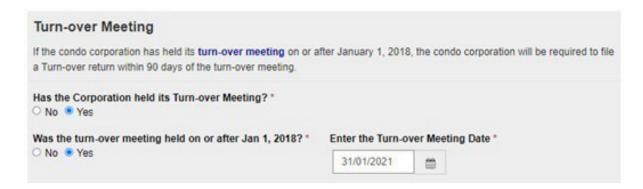
#### **Description**

Every director is elected for a term of three years or less. Ensure that the most recent term start dates are entered for every director. Please note that term start dates for

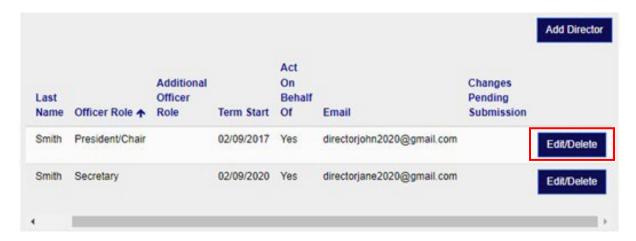
directors exceeding four years will not be accepted by the condo returns filing system.

#### **Troubleshooting Steps**

1. Under the "Turn-over Meeting" section, ensure that the correct selection is made regarding whether the condominium corporation has held its turn-over meeting. Additionally, ensure that the correct turn-over meeting date is entered if the turn-over meeting was held on or after Jan 1, 2018. If the turn-over meeting was held before Jan 1, 2018, select "No" under "Was the turn- over meeting held on or after Jan 1, 2018?".



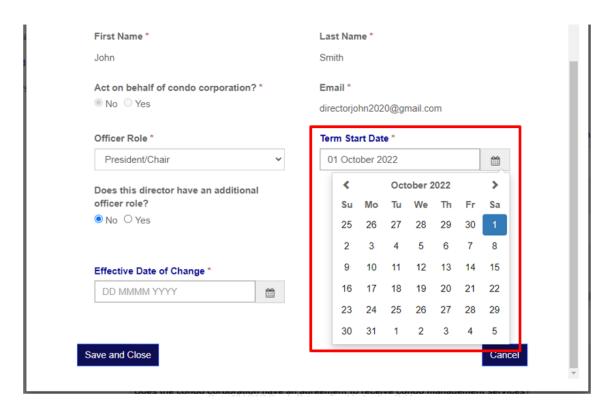
2. In the "Board of Directors" table, click on the "Edit/Delete" button to the right of the director's name



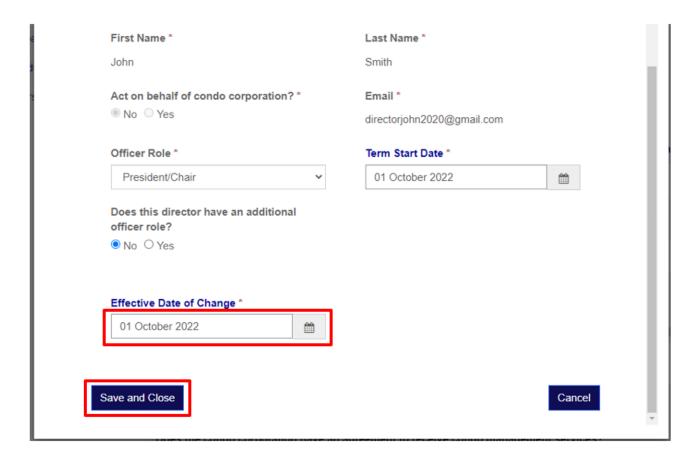
3. Select "Edit" under Step 1.



**4.** Enter the most recent term start date of the director by selecting the calendar icon and choosing a date.

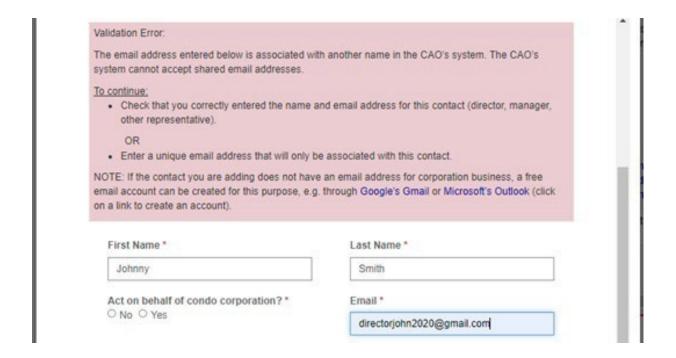


**5.** Enter the effective date of change by clicking the calendar icon then click on the "Save and Close" button.



# An Individual's Email Address is Associated with Another Name in the CAO's System

#### **Error Message**



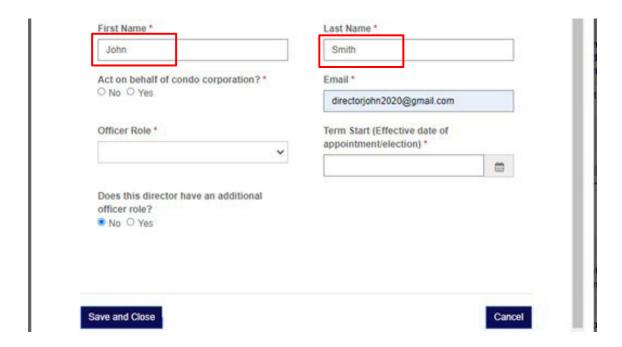
#### **Description**

Every individual added to the corporation profile must be added with their first name, last name, and email address as it appears on their CAO account. This ensures that every individual's CAO account is linked to the condominium corporation. If an individual does not have a CAO account, they must be added with a unique email address.

For directors who already have a CAO account or who have already completed director training, please provide the same email address and the exact same spelling of their first and last name that they used to create their account and complete director training. The director may verify this spelling by logging into their CAO account on the CAO's website and going to their personal profile. This ensures that their completed director training is linked to the condominium corporation.

#### **Troubleshooting Steps**

1. In the "Board of Directors" table, click on the "Edit/Delete" button to the right of the director's name.



2. If you continue to experience the error message, you may not have the correct spelling of the director's information. Please then confirm with the director the spelling of their first name, last name, and email address as it appears on their CAO account which they used to complete director training.

# The Same Individual is Added as a Non-Director Officer or Other Representative

#### **Error Message**

This individual with the email address you entered has already been added to this condo corporation profile as a non-director officer or other representative.

To add this individual as a director, you must first delete this individual as a non-director officer or other representative.

#### **Description**

Directors must be added to the "Board of Directors" table and not to the "Non-Director Officers and Other Representatives" table. Please ensure that a director is added to only one.

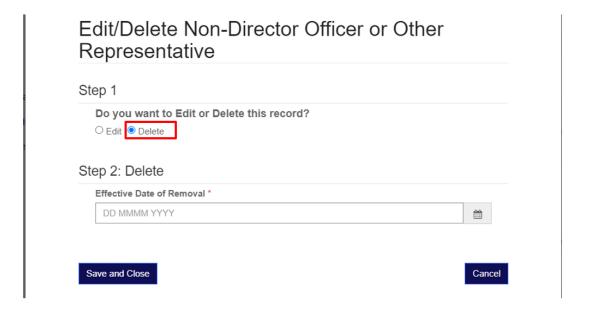
Condominium managers must be added to the "Condominium Manager" table and not to the "Non-Director Officers and Other Representatives" table.

#### **Troubleshooting Steps**

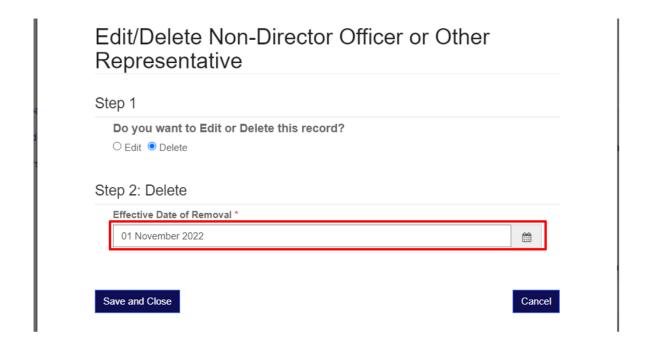
1. If the individual is a director, delete the individual from the "Non-Director Officers and Other Representatives" table. Click on the "Edit/Delete" button.



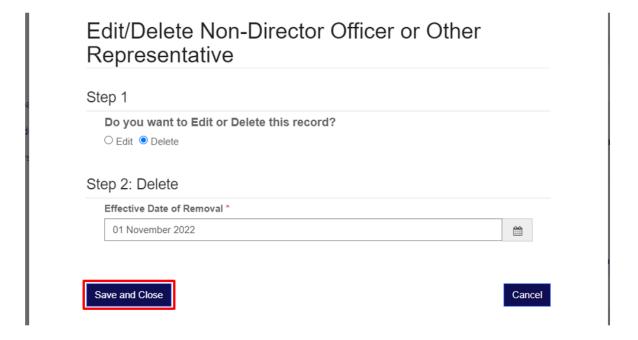
2. Select "Delete" under Step 1.



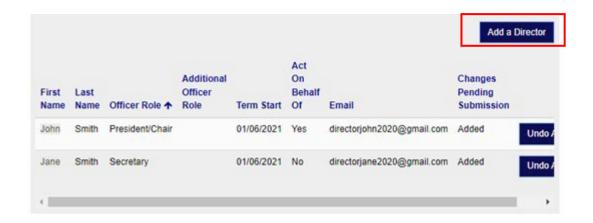
**3.** Enter the "Effective Date of Removal" under Step 2 by clicking on the calendar icon.



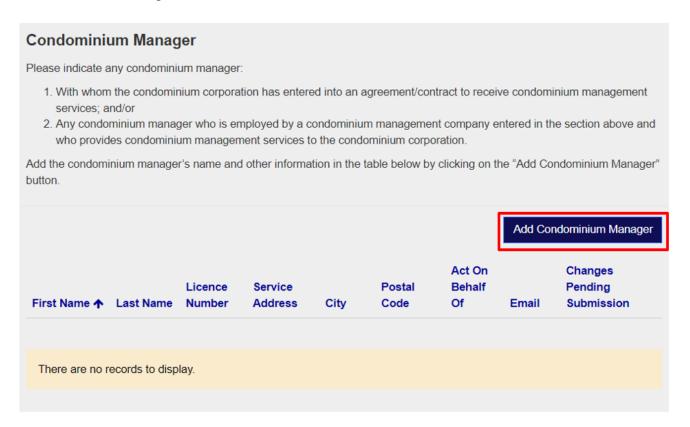
**4.** Click on the "Save and Close" button.



**5.** After deleting the individual from the "Non-Director Officers and Other Representatives" table, you can then add the individual to the "Board of Directors" table if the individual is a director.



If the individual is a condominium manager, you can then add the individual to the "Condominium Manager" table.



**6.** If the individual is not a director or a condominium manager and is only a non-director officer or other representative, you may delete them as a director or condominium manager instead.

# No Active License Number Found for an Individual Added as a Condominium Manager

#### **Error Message**

An active licence number has not been found for this individual. Please visit the CMRAO Public Registry or contact the condo manager/condo management company to confirm the licence number for this individual before proceeding. Please note that all individuals providing condo management services in Ontario must be licensed by the Condominium Management Regulatory Authority (CMRAO) as per section 34 (1) of the Condominium Management Services Act, 2015.

If you continue with the individual listed, their name will not appear on the CAO's Public Registry or in the condo corporation's return/NOC PDF record until a NOC is filed to correct the information. Instead, a message will appear indicating that a licensed condo manager could not be confirmed at this time. Additionally, if the licence information is not removed or corrected within 30 days, the CMRAO will be notified.

Save and Close

Cancel

#### **Description**

Only condominium managers licensed by the Condominium Management Regulatory Authority of Ontario may provide condominium management services.

If you add a condominium manager without their license number and click "Yes, I confirm", your condominium corporation will be flagged for follow-up. We recommend adding a condominium manager into the system with their license information as explained below.

#### **Troubleshooting Steps**

1. Search the condominium manager using the search lookup function. It is the fastest and most accurate way to add a condominium manager.

# Add Condominium Manager

Please enter the name or licence number of the condo manager in the fields below. You will need to search the condo manager by either their "Legal Name", "Licensed as" name, or licence number as indicated on the Condominium Management Regulatory Authority of Ontario (CMRAO) website.



**Note:** If you cannot find a condominium manager using their name or do not have their licence number, please consult with the condominium manager directly to obtain their licence number AND the spelling of their first and last name as it appears on their CRMAO licence (some managers may use different spellings of their names). The CMRAO also has a Public Registry where users can search for this information.

When you have the name and licence number, return to this page and enter the information.

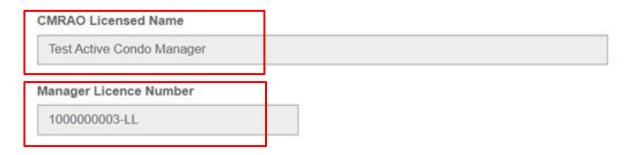
To search, enter the licensed name in the "Search by Name" field or the licence number of the condominium manager in the "Search by Licence Number" field. Select the name of the condominium manager from the drop-down search result.

## Add Condominium Manager

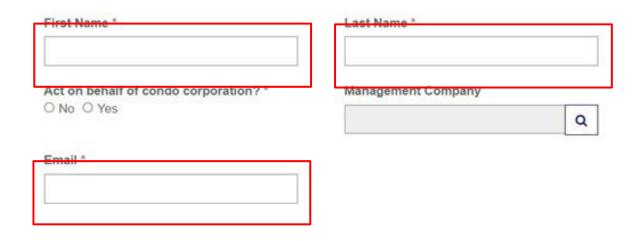
Please enter the name or licence number of the condo manager in the fields below. You will need to search the condo manager by either their "Legal Name", "Licensed as" name, or licence number as indicated on the Condominium Management Regulatory Authority of Ontario (CMRAO) website.



2. The "CMRAO Licensed Name" and "Manager Licence Number" fields are populated with the information of the condominium manager you selected in step 1. Confirm that the information is correct.

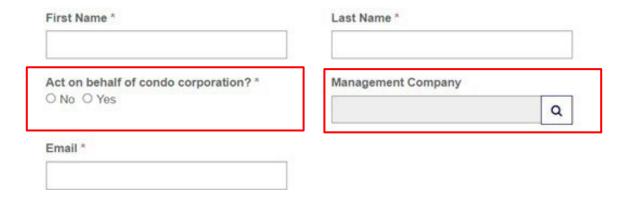


**3.** Enter the first name, last name, and email address of the condominium manager. Please ensure that you are entering the name and email address of the same individual you selected in step 1.

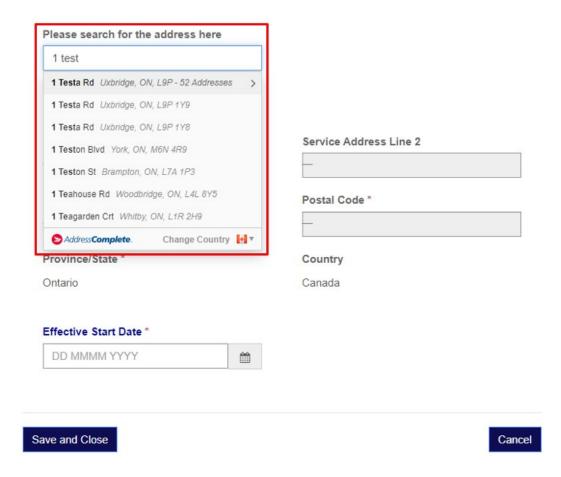


**Note:** If this individual already has a CAO account, please enter the first name, last name, and email address for this individual as it appears on their CAO account.

**4.** Select whether the condominium manager can act on behalf of the condominium corporation and enter the management company the manager is employed with, if applicable.



**5.** Search for the condominium manager's address for service by using the address search function.



6. Enter the effective start date and click on the "Save and Close" button.



### No Municipal Address Information was Entered

#### **Error Message**



#### **Description**

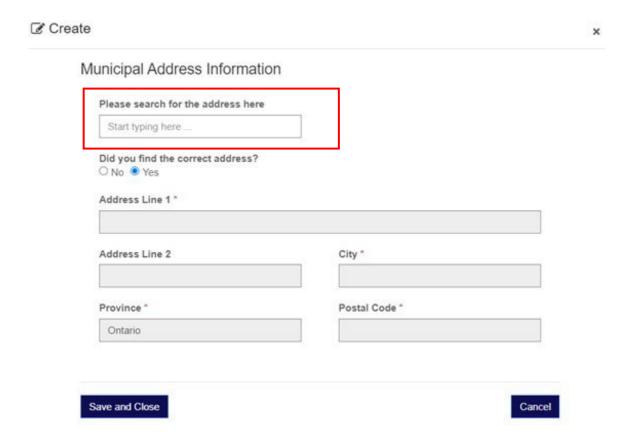
"Standard" type condominium corporations must provide a municipal address when filing. If they do not do this, they will receive an error message and will be prevented from filing.

#### **Troubleshooting Steps**

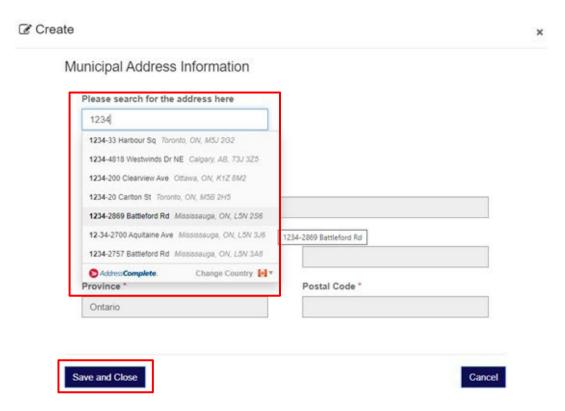
**1.** Go to the "Municipal Address" section and enter how many addresses the condominium corporation has and then click "Add Address".



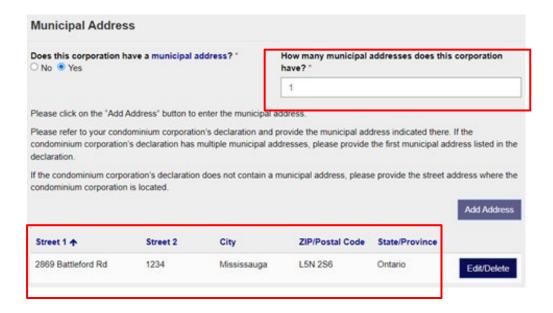
2. Enter an address using the lookup search function.



**3.** Choose the correct address from the options presented in the drop-down menu and click "Save and Close".



**4.** Review that the address information you entered is correct.



### The Entered Municipal Address is not an Ontario Address

#### **Error Message**

cao.microsoftcrmportals.com says Address should be Ontario only.

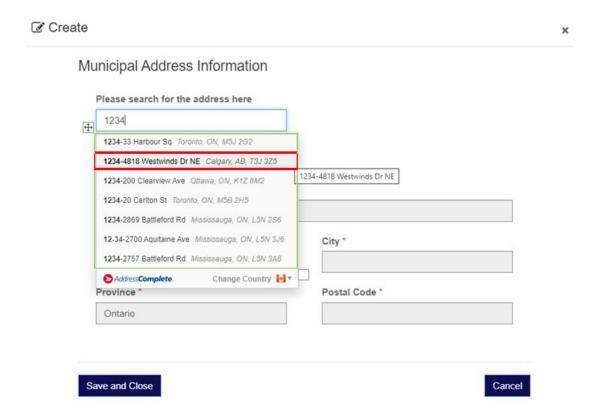


#### **Description**

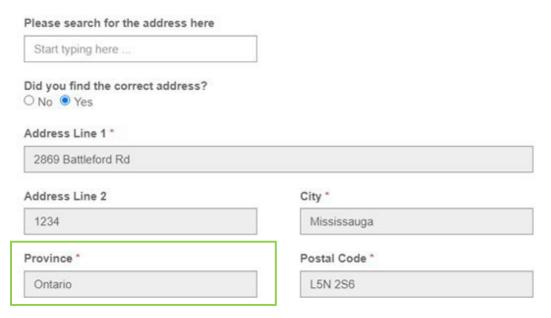
All municipal addresses filed must be in Ontario.

#### **Troubleshooting Steps**

**1.** Ensure that you are choosing an address which exists in Ontario. For instance, if you chose the address in red below, you would not be permitted to add it.



#### Municipal Address Information



2. Click "Save and Close" to save the Ontario address.

Save and Close

# The Sum of all the Unit Types Does Not Match the Number of Total Units

#### **Error Message**

O Validation Summary

Units: The sum of all unit types must match the number of total units.

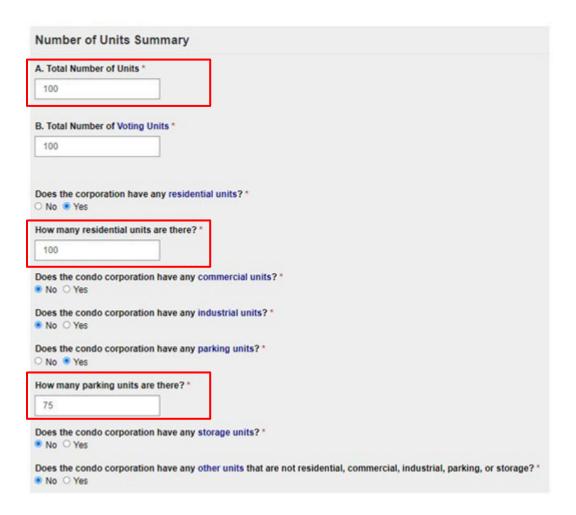
#### **Description**

The total number of units is the sum of all units used for any purpose, including residential, parking, storage, and commercial units combined. You may wish to refer to the condominium corporation's declaration for this number. Ensure that the sum of all the unit types is equal to the total number of units entered.

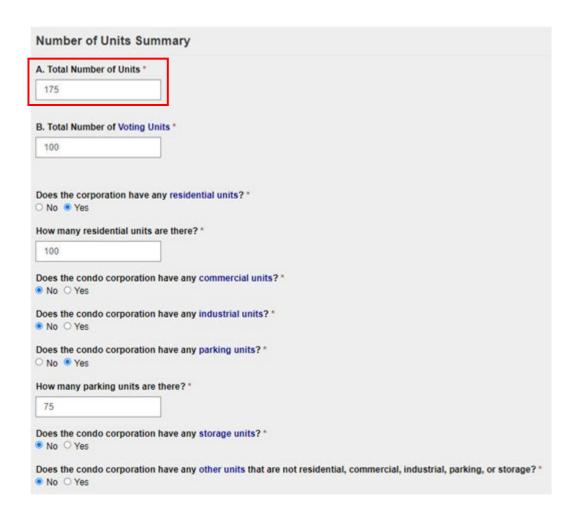
**Note:** This section is not applicable to common elements condominium corporations.

#### **Troubleshooting Steps**

1. Ensure that the sum of all the unit types is equal to the total number of units. In the example below, there are 100 residential units and 75 parking units which make it a total of 175 units.



**2.** Edit the total number of units to ensure that the sum of all the unit types is equal to the total number of units.



#### Other Technical Issues

#### **Description**

This section provides basic troubleshooting steps to resolve technical issues encountered when filing returns. These technical issues may include but are not limited to:

- Buttons and options on the returns form not working
- The returns form or a section of the form is not loading
- Nothing happening when the "Save and Next" button is clicked

#### **Troubleshooting Steps**

- 1. Ensure that you are using the most updated version of the Google Chrome browser. Google Chrome is most compatible with the condo returns filing system. If you do not have Google Chrome installed on your computer, you can download it for free from Google Chrome's website.
- **2.** Ensure that your Google Chrome browser is up to date. To learn how to update Chrome, visit Google Chrome's website.
- **3.** Clear Google Chrome's browsing history. To learn how to clear the browsing history, visit Google Chrome's website.

Use Google Chrome's Incognito window. To follow the steps in opening an Incognito window, visit Google Chrome's website.