

GFSC Online Submissions Portal

February 2021 updates – guidance notes

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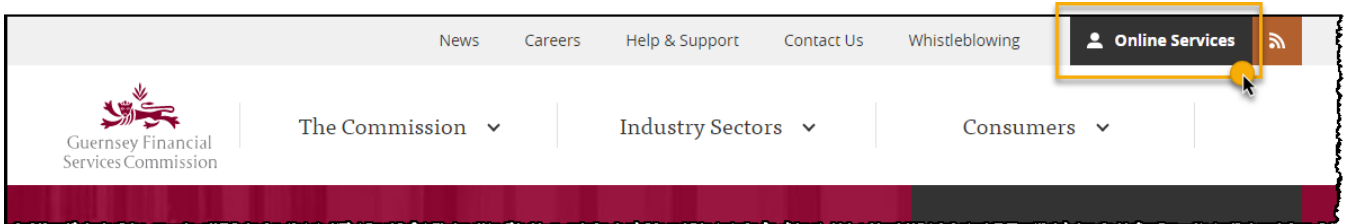
Add another Super User to your firm:28

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Register an account on the OS Portal

Before you can use the Online Submissions (“OS”) portal, you need to register an account. Launch the portal from an Internet browser using <https://submit.gfsc.gg> or from the Commission website www.gfsc.gg using the Online Services button shown below, which will direct you to <https://auth.gfsc.gg>.



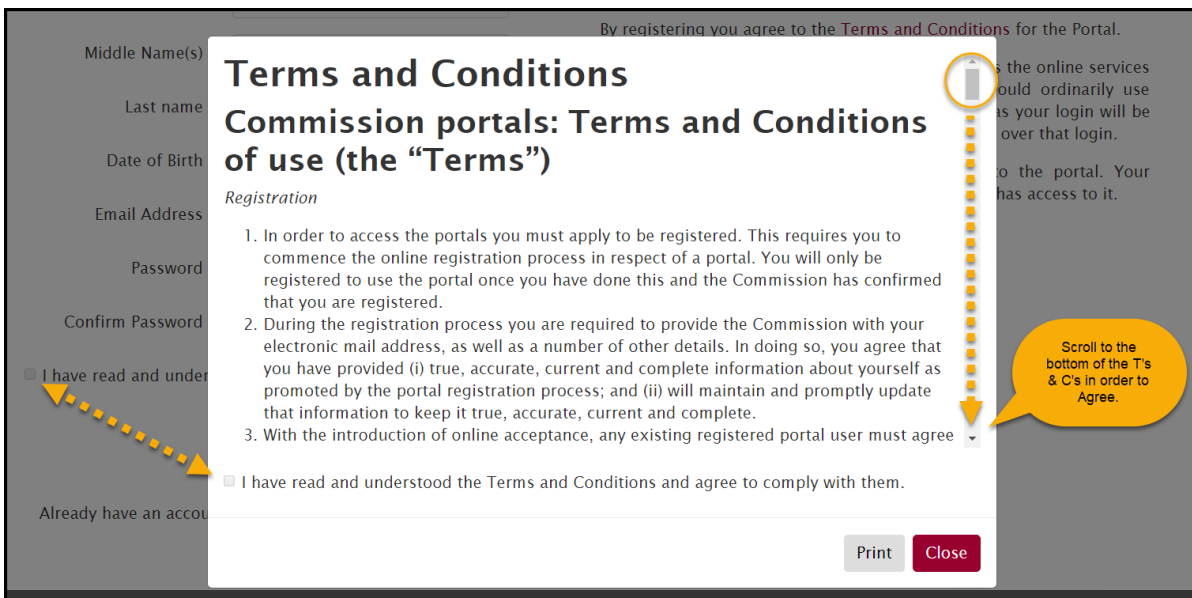
Click register and fill out the registration form.

Electronic Commission portals Terms and Conditions (“Terms” or “T’s & C’s”)

In June of 2020 we introduced electronic Commission portals Terms replacing the previous requirement for an Online Services Agreement (“OSA”). These Terms have been updated and cover both the OS and PQ Portals.

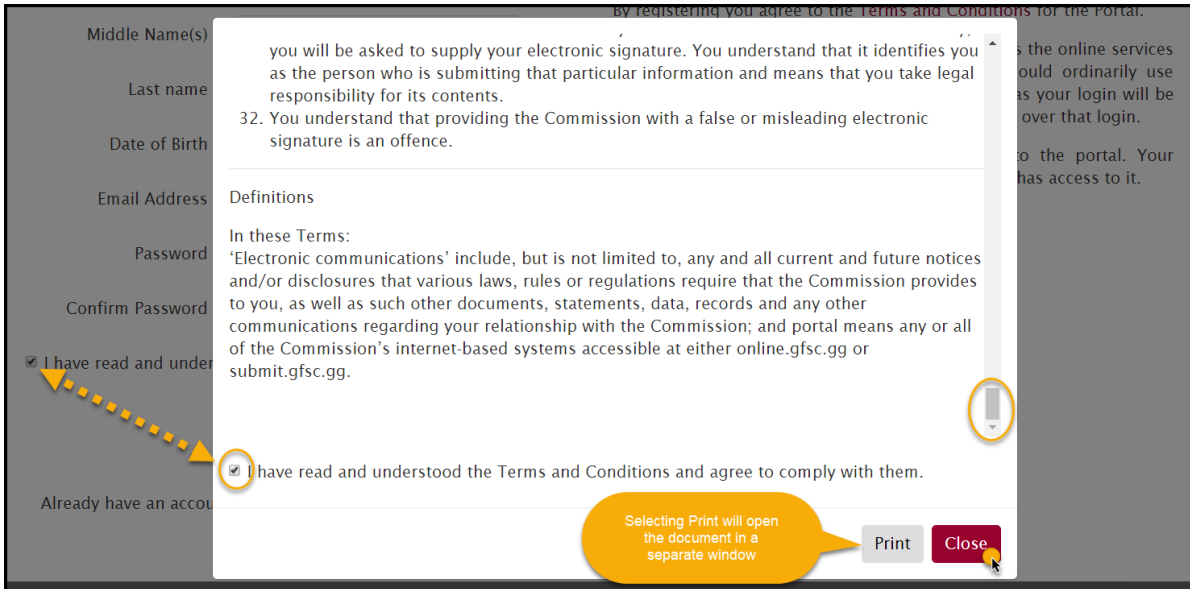
When the pop-up window is presented with the Terms, you will need to read through the entire document, **scrolling to the end** of the document before it is possible to click that you have agreed to abide by the Terms.

You are able to **print** and/or save a copy of the full document, if desired – simply **close** the window to resume registration or login.



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The Terms must be agreed to on registration if a new account for the Online Services portals is being set up.

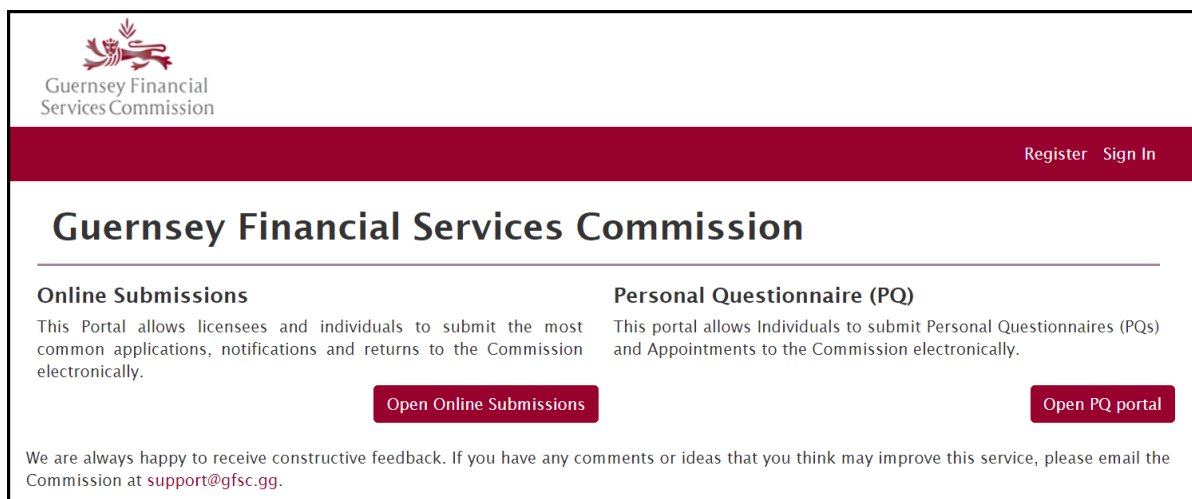
If you are logging into your existing portal account for the first time since the Terms were introduced, the Terms will require agreement before you can navigate to your portal account.

It will not be possible to log into your portal account without having first agreed to the Terms.

If/when the Terms are updated, they will be re-presented for agreement on your next login.

Logging in for the first time after registration

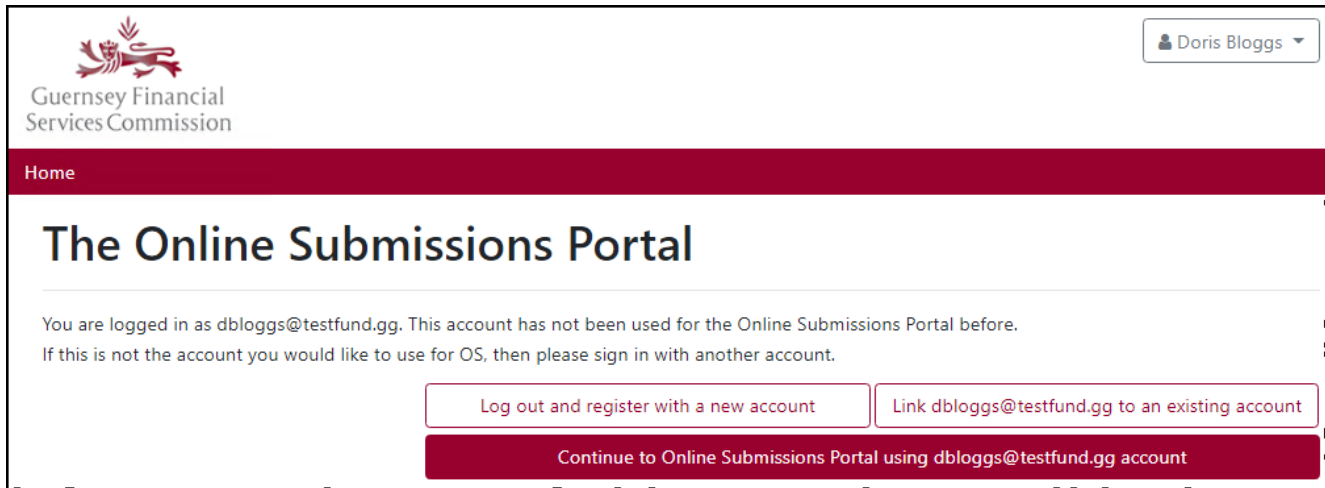
If you have navigated from the gfsc.gg website using the Online Services button (which directs you to auth.gfsc.gg) to register, then once you have confirmed your email and logged in, you will be taken to a screen where you can choose which portal you want to enter:



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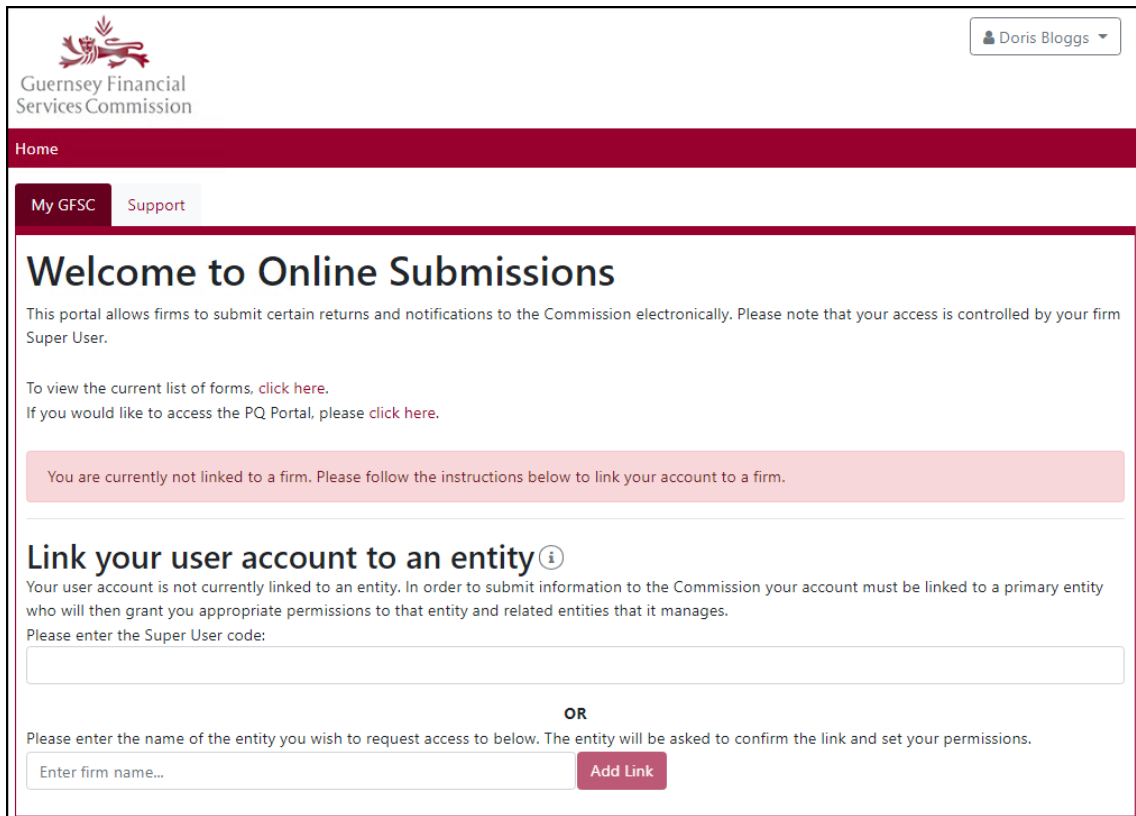
If you have navigated to the registration screen from submit.gfsc.gg, then once you have confirmed your email and logged in, you will be asked whether you want to link your account an existing account.



The screenshot shows the top navigation bar with the Guernsey Financial Services Commission logo and a user profile dropdown for 'Doris Bloggs'. Below the navigation bar is a red header with the text 'Home'. The main content area features the title 'The Online Submissions Portal' and a message: 'You are logged in as dblogs@testfund.gg. This account has not been used for the Online Submissions Portal before. If this is not the account you would like to use for OS, then please sign in with another account.' There are two buttons: 'Log out and register with a new account' and 'Link dblogs@testfund.gg to an existing account'. A prominent red button at the bottom says 'Continue to Online Submissions Portal using dblogs@testfund.gg account'.

If you want to link your new account to an existing PQ portal account, then please refer to the '[Linking Portal accounts manually](#)' section in this document. Otherwise, click *Continue to Online Submissions Portal using youremailaddress@work.com account*

The portal will then ask you to link your new account to a firm:



The screenshot shows the 'Welcome to Online Submissions' page. It includes the Guernsey Financial Services Commission logo and a user profile dropdown for 'Doris Bloggs'. Below the navigation bar is a red header with the text 'Home'. The main content area features the title 'Welcome to Online Submissions' and a message: 'This portal allows firms to submit certain returns and notifications to the Commission electronically. Please note that your access is controlled by your firm Super User. To view the current list of forms, click here. If you would like to access the PQ Portal, please click here.' A red box contains the message: 'You are currently not linked to a firm. Please follow the instructions below to link your account to a firm.' Below this is a section titled 'Link your user account to an entity' with an information icon. The text reads: 'Your user account is not currently linked to an entity. In order to submit information to the Commission your account must be linked to a primary entity who will then grant you appropriate permissions to that entity and related entities that it manages. Please enter the Super User code:' followed by a text input field. Below this is the word 'OR' and the text: 'Please enter the name of the entity you wish to request access to below. The entity will be asked to confirm the link and set your permissions.' This is followed by a text input field labeled 'Enter firm name...' and a red button labeled 'Add Link'.

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You can link your account using either:

- A *Super User Code* that will link the account to a firm and register it as a Super User (see the [Super User](#) section, further down in the document); or
- the *Firm name*, which once requested will have to be approved by that firm's Super User.

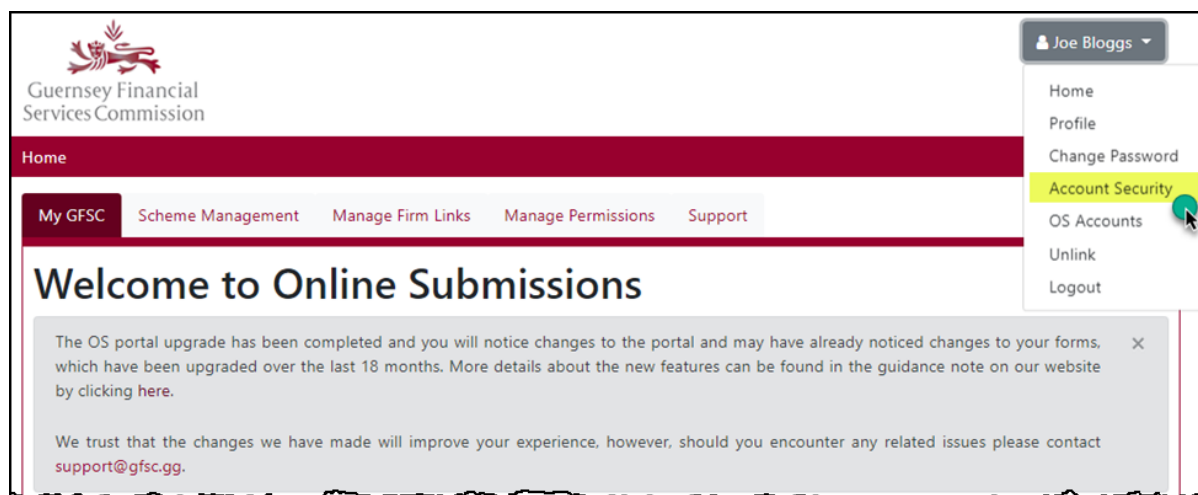
Manage 2FA

Two-Factor Authentication ("2FA") is an additional layer of security that you can apply to your Online Services portal account. If you have it set up, when you log into either portal, an additional prompt will display asking you to enter a security code. This code is sent to you via your registered e-mail address or the authentication app. Because the code is uniquely generated every time you log in, it helps to prevent unauthorised account access in the event your password becomes compromised. This means a potential attacker requires both your password and access to your e-mail account or authentication app before they are able to gain access to your portal account.

If you want to know more about 2FA, visit www.ncsc.gov.uk/guidance/using-passwords-protect-your-data for additional information.

2FA methods

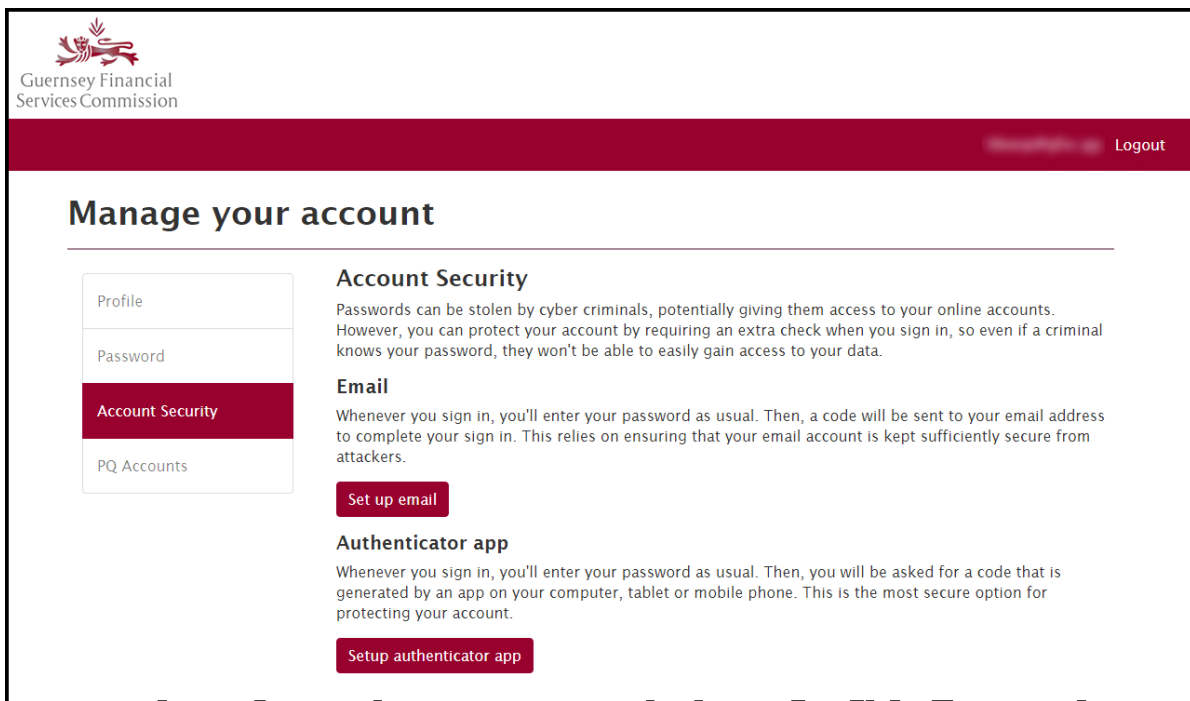
From the User drop-down menu in the top right - select the option *Account Security*.



1. Two options are available: Email or Authenticator App:

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The screenshot shows the 'Manage your account' page with a sidebar menu containing 'Profile', 'Password', 'Account Security', and 'PQ Accounts'. The 'Account Security' section is active and contains the following text:

Account Security
Passwords can be stolen by cyber criminals, potentially giving them access to your online accounts. However, you can protect your account by requiring an extra check when you sign in, so even if a criminal knows your password, they won't be able to easily gain access to your data.

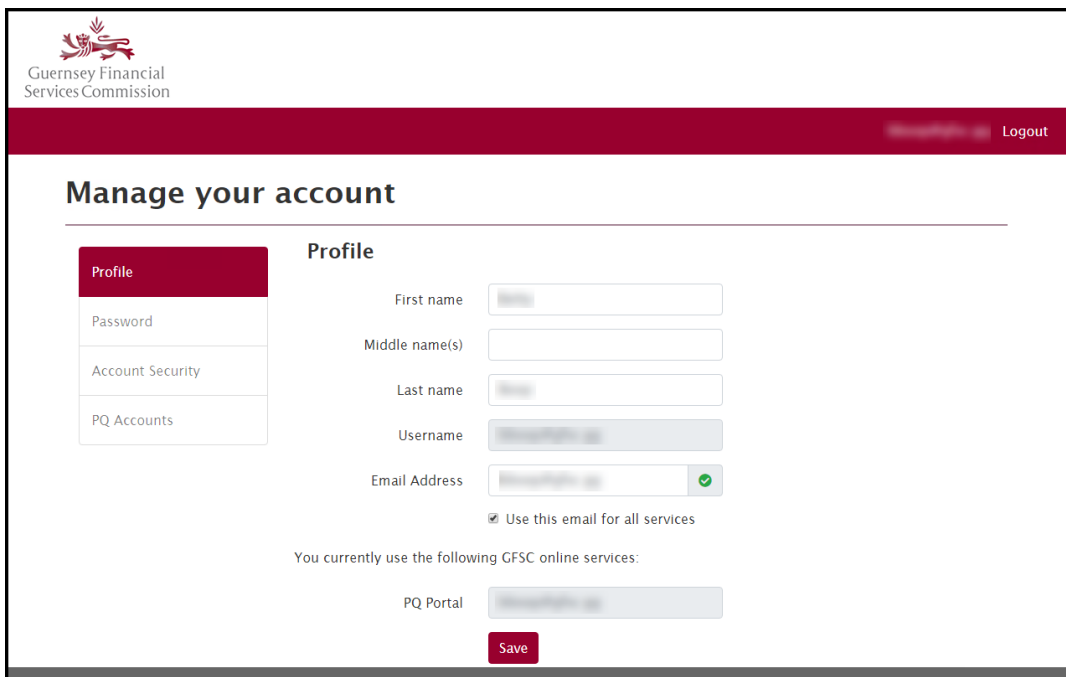
Email
Whenever you sign in, you'll enter your password as usual. Then, a code will be sent to your email address to complete your sign in. This relies on ensuring that your email account is kept sufficiently secure from attackers.

Authenticator app
Whenever you sign in, you'll enter your password as usual. Then, you will be asked for a code that is generated by an app on your computer, tablet or mobile phone. This is the most secure option for protecting your account.

Buttons: **Set up email**, **Setup authenticator app**

Set up with email 2FA

1. Click *Set up email* and your Profile page will be displayed – click on the *Save* button:



The screenshot shows the 'Manage your account' page with the 'Profile' section active. The sidebar menu contains 'Profile', 'Password', 'Account Security', and 'PQ Accounts'. The 'Profile' section contains the following form fields:

Profile

First name:

Middle name(s):

Last name:

Username:

Email Address:

Use this email for all services

You currently use the following GFSC online services:

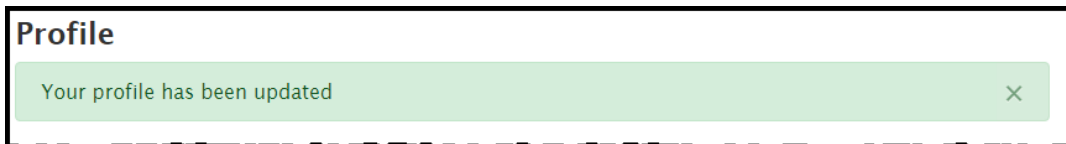
PQ Portal:

Save

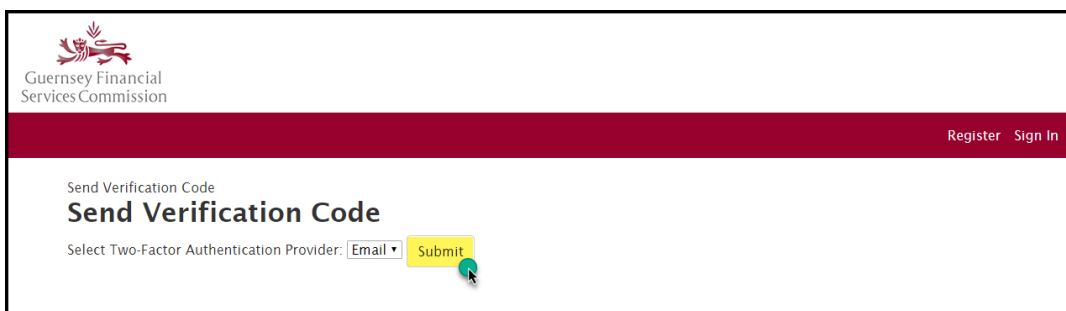
2. Your profile has been updated message is displayed:

GFSC Online Submissions Portal

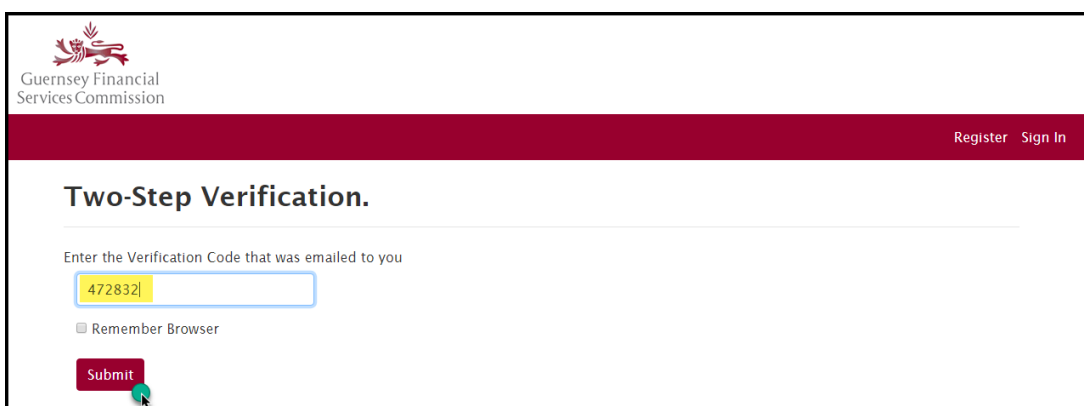
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3. Next time you log into the OS Portal, the following screen is displayed – click on the *Submit* button:



4. You will be sent an email with a Security Code. Enter the Security Code into the box on the Two-Step Verification screen and click on *Submit*:



Note: The *Remember Browser* tick box will allow you to forego 2FA for a limited time, so if your login times out you do not need to keep using 2FA to log back in.

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Set up Authenticator App 2FA

1. Click *Setup authenticator app* and follow the instructions displayed on the next screen to configure the authenticator app.



Manage your account

- Profile
- Password
- Account Security**
- PQ Accounts

Configure authenticator app

To use an authenticator app go through the following steps:

1. Download a two-factor authenticator app

Microsoft Authenticator



Google Authenticator



Authy



2. Scan the QR Code or enter this key `jx4u galz o7rw pffh ef46 5mla ykxh nnvx`



3. Once you have scanned the QR code or input the key above, your two factor authentication app will provide you with a unique code. Enter the code in the confirmation box below.

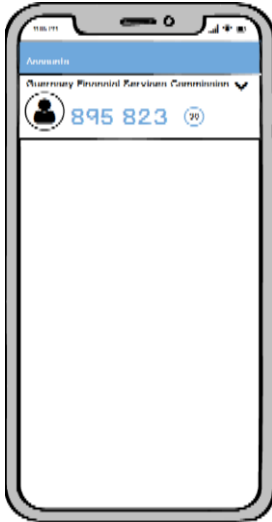
Enter the Verification
Code generated by your
Authenticator App

Two-Step Verification

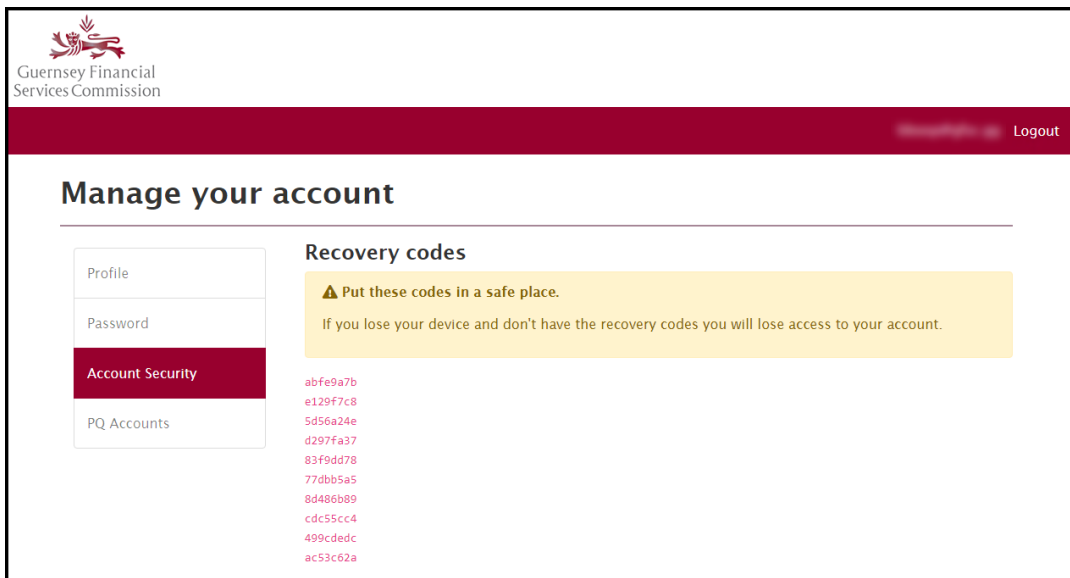
2. The verification code is generated by the authenticator app after it's installed. If you do not have a mobile device on which to install the app, use a PC.

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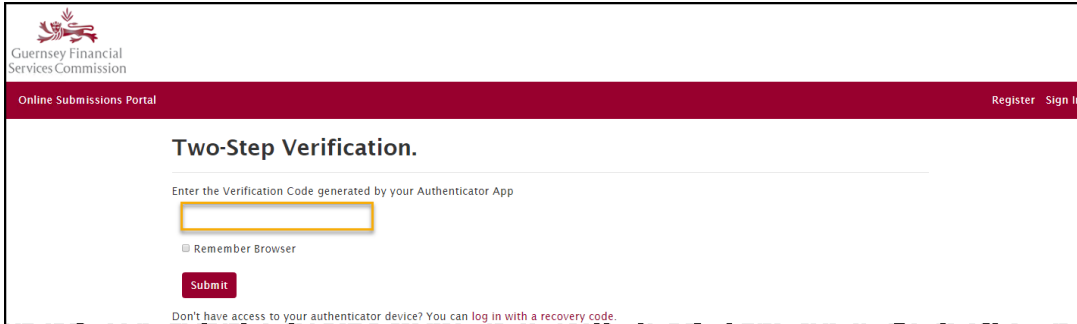
3. After clicking Two-Step Verification, a list of recovery codes is displayed, keep these somewhere safe and only use them if you lose your device.



4. Two-factor authentication is now enabled on your account.
5. The next time you log in, you will see the following verification screen and will be required to enter a verification code to gain access to your account.

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Guernsey Financial
Services Commission

Online Submissions Portal Register Sign In

Two-Step Verification.

Enter the Verification Code generated by your Authenticator App

Remember Browser

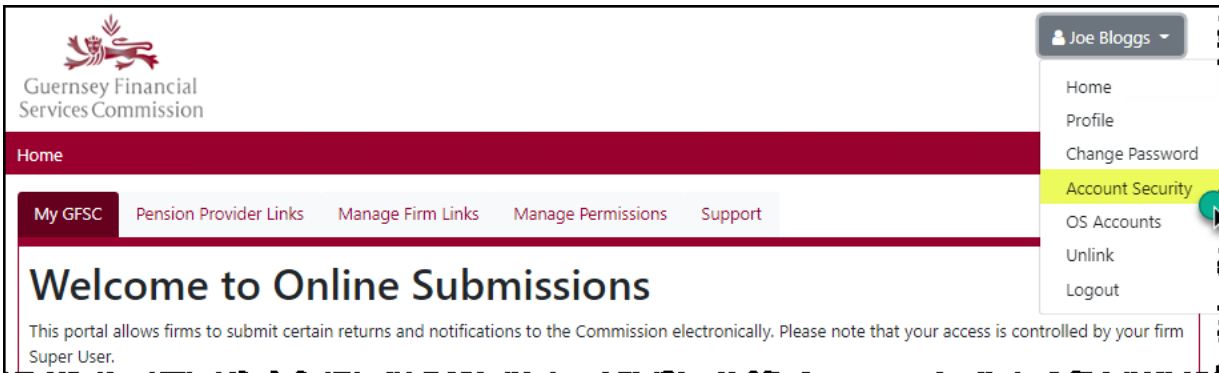
[Don't have access to your authenticator device? You can log in with a recovery code.](#)

- Your verification code is generated by the authenticator app. Type the code into the Code field.

NOTE: The code is only valid for 30 seconds.

Disable 2FA

From the User drop-down menu in the top right - select the option *Account Security*.



Guernsey Financial
Services Commission

Home

My GFSC Pension Provider Links Manage Firm Links Manage Permissions Support

Welcome to Online Submissions

This portal allows firms to submit certain returns and notifications to the Commission electronically. Please note that your access is controlled by your firm Super User.

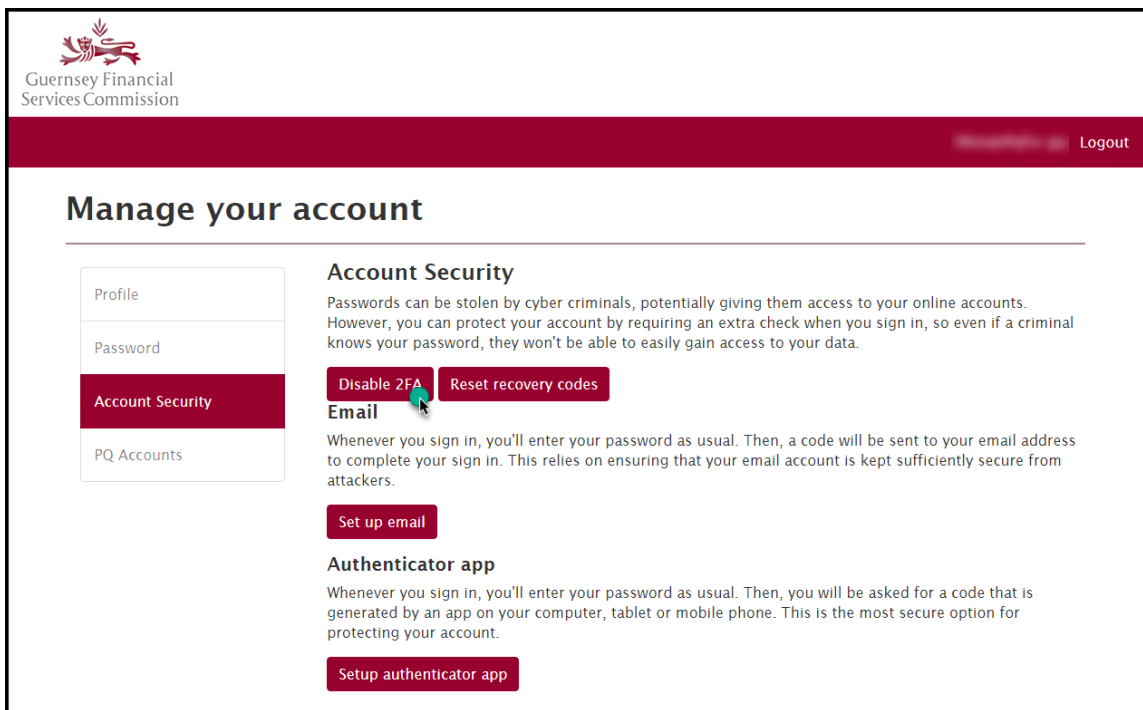
Joe Bloggs

- Home
- Profile
- Change Password
- Account Security
- OS Accounts
- Unlink
- Logout

- If you had registered for Online Submissions Portal two-factor authentication before the 15th July 2019 go to the [Disable Email Two-factor Authentication](#) section below. Otherwise click *Disable 2FA*.

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Guernsey Financial Services Commission

Logout

Manage your account

- Profile
- Password
- Account Security**
- PQ Accounts

Account Security

Passwords can be stolen by cyber criminals, potentially giving them access to your online accounts. However, you can protect your account by requiring an extra check when you sign in, so even if a criminal knows your password, they won't be able to easily gain access to your data.

[Disable 2FA](#) [Reset recovery codes](#)

Email

Whenever you sign in, you'll enter your password as usual. Then, a code will be sent to your email address to complete your sign in. This relies on ensuring that your email account is kept sufficiently secure from attackers.

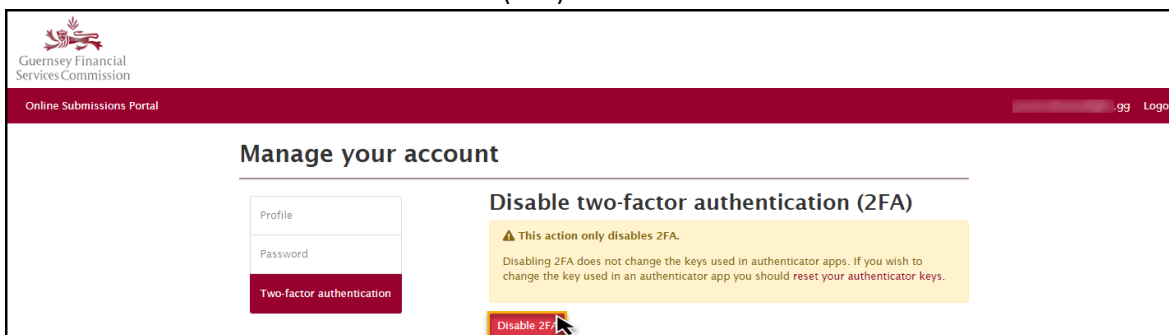
[Set up email](#)

Authenticator app

Whenever you sign in, you'll enter your password as usual. Then, you will be asked for a code that is generated by an app on your computer, tablet or mobile phone. This is the most secure option for protecting your account.

[Setup authenticator app](#)

- On the Disable two-factor authentication (2FA) screen that follows click *Disable 2FA*



Guernsey Financial Services Commission

Online Submissions Portal .gg Logout

Manage your account

- Profile
- Password
- Two-factor authentication**

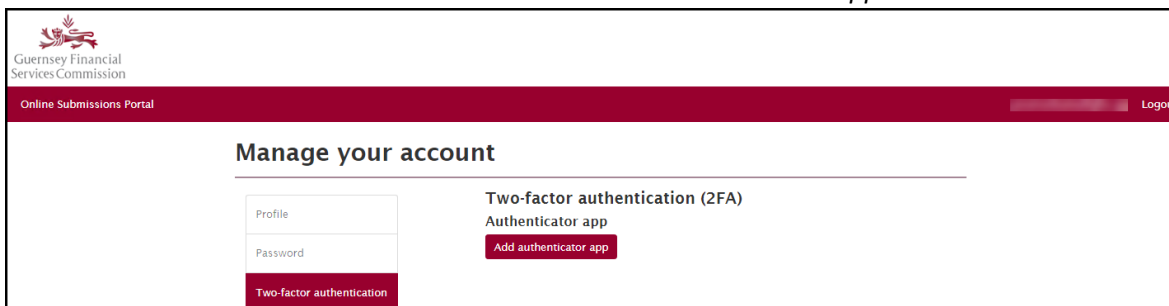
Disable two-factor authentication (2FA)

⚠ This action only disables 2FA.

Disabling 2FA does not change the keys used in authenticator apps. If you wish to change the key used in an authenticator app you should reset your authenticator keys.

[Disable 2FA](#)

- Two-factor authentication is now disabled and the *add authenticator app* button is visible.



Guernsey Financial Services Commission

Online Submissions Portal .gg Logout

Manage your account

- Profile
- Password
- Two-factor authentication**

Two-factor authentication (2FA)

Authenticator app

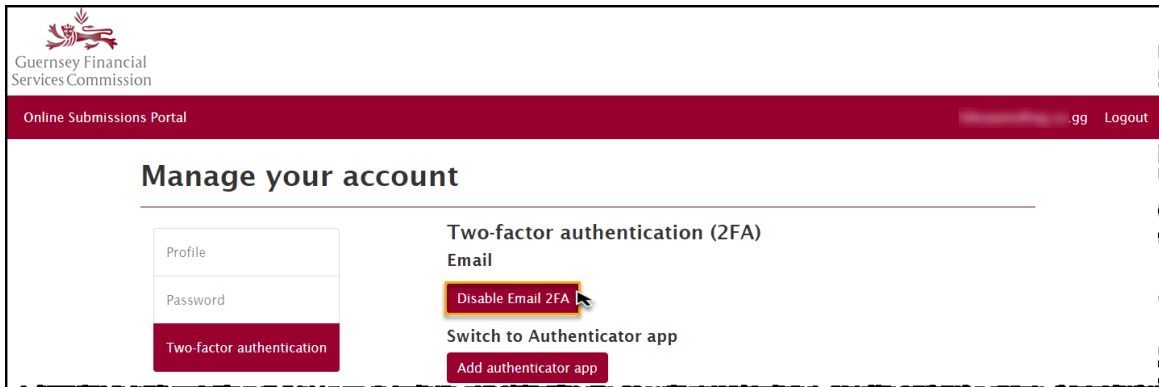
[Add authenticator app](#)

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Disable Email Two-factor Authentication

1. Click *Disable Email 2FA*.



The portal takes you back to your profile page. Email two-factor authentication is now disabled.

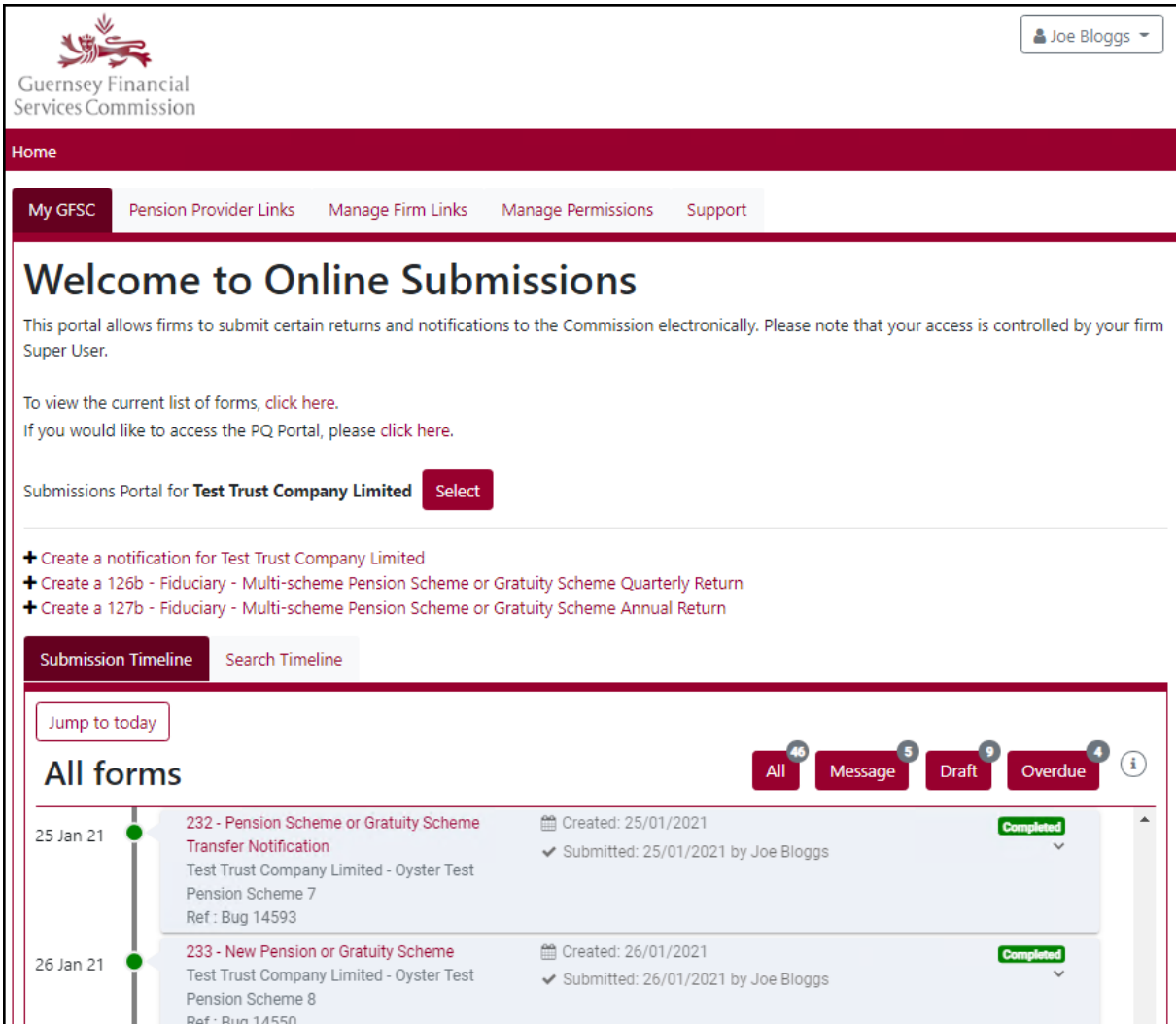
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OS Portal Homepage

My GFSC tab

This is the main tab on the OS portal, from which you are able to create and submit notification forms to the Commission and track your returns to see when they are due for submission.



The screenshot shows the homepage of the Guernsey Financial Services Commission's Online Submissions Portal. At the top, there is a navigation bar with the logo and the text 'Guernsey Financial Services Commission'. Below this is a 'Home' header. The main navigation menu includes 'My GFSC', 'Pension Provider Links', 'Manage Firm Links', 'Manage Permissions', and 'Support'. The 'My GFSC' tab is active, displaying a 'Welcome to Online Submissions' message. This message explains that the portal allows firms to submit returns and notifications electronically and that access is controlled by the firm's Super User. It provides links to view the current list of forms and to access the PQ Portal. Below the welcome message, there is a section for 'Submissions Portal for Test Trust Company Limited' with a 'Select' button. A list of actions is provided: '+ Create a notification for Test Trust Company Limited', '+ Create a 126b - Fiduciary - Multi-scheme Pension Scheme or Gratuity Scheme Quarterly Return', and '+ Create a 127b - Fiduciary - Multi-scheme Pension Scheme or Gratuity Scheme Annual Return'. The 'Submission Timeline' section is visible, showing a 'Jump to today' button and a list of forms. The 'All forms' section has filters for 'All' (46), 'Message' (5), 'Draft' (9), and 'Overdue' (4). Two forms are listed: one from 25 Jan 21 (232 - Pension Scheme or Gratuity Scheme Transfer Notification) and one from 26 Jan 21 (233 - New Pension or Gratuity Scheme). Both forms are marked as 'Completed' and were submitted by Joe Bloggs.

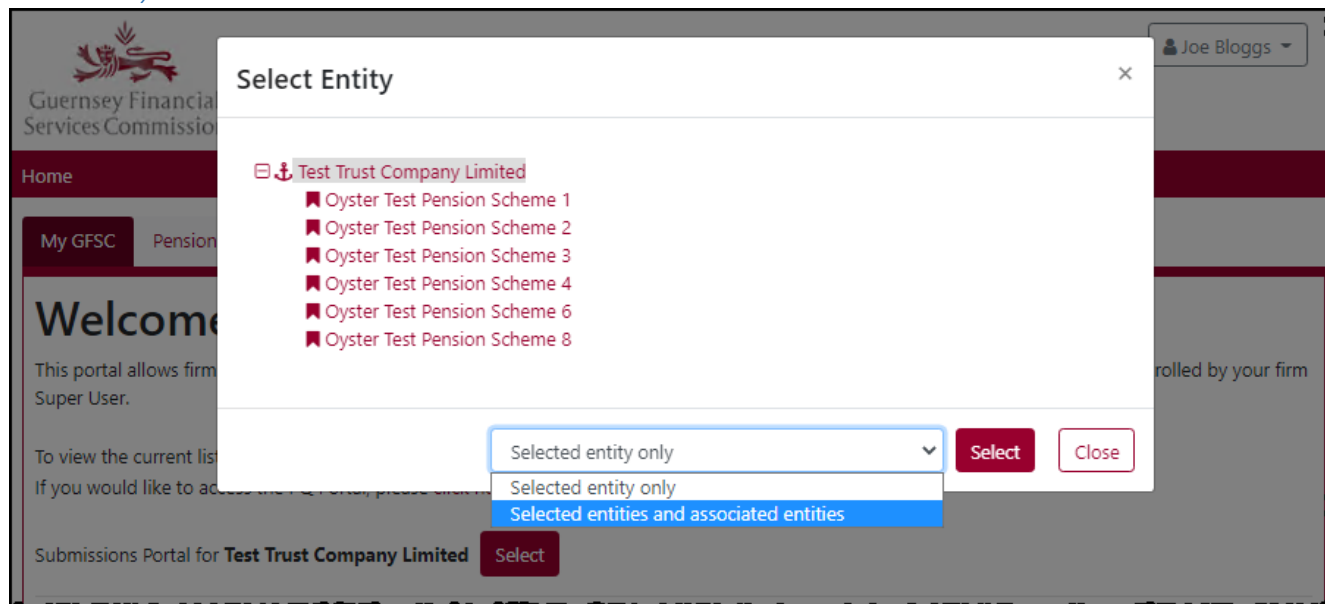
Note: Users are only able to create notifications or fill out returns after they are granted *Prepare* or *Submit* permissions for a firm, by the firm's Super User. See the *Manage Permissions* tab.

Use the *Select* button to change the Submission portal for view to another of your entities. The Submission Timeline will be updated to reflect the selected entity.

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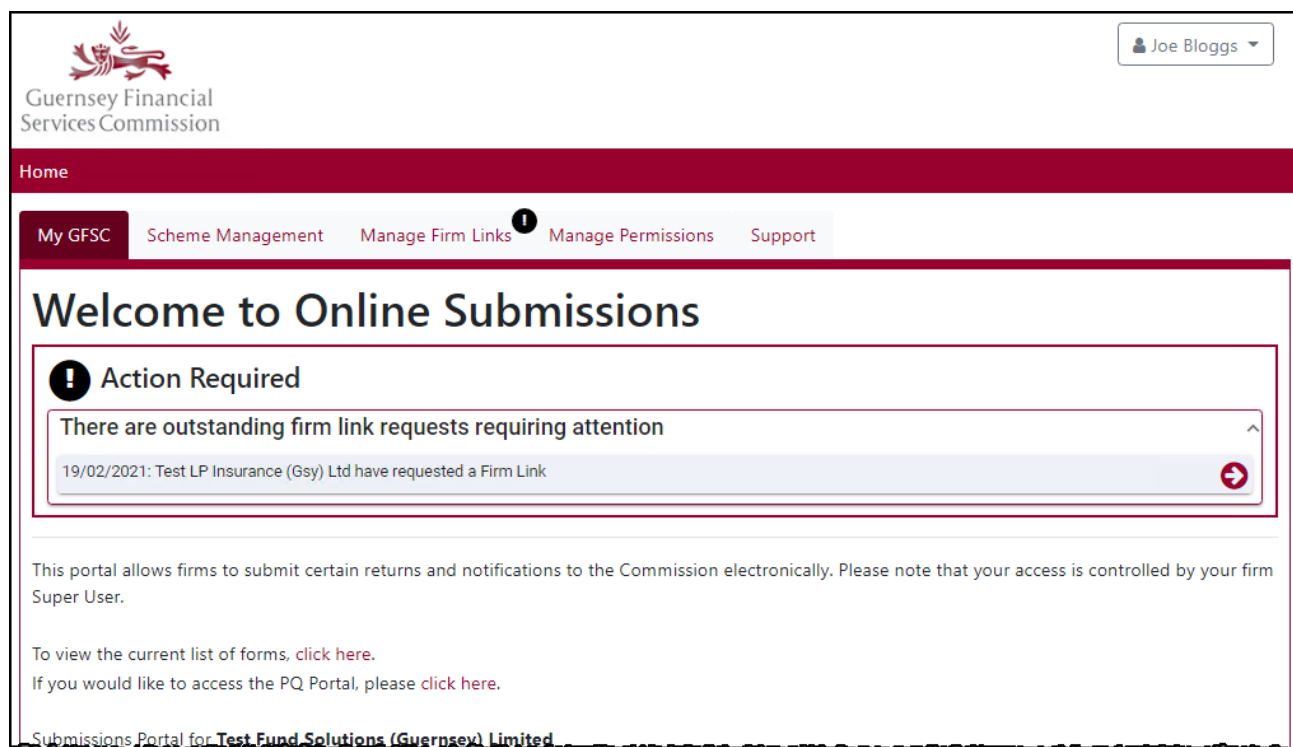
Select Entity:



The screenshot shows a 'Select Entity' modal window. At the top, it says 'Test Trust Company Limited' with a folder icon. Below it is a list of eight 'Oyster Test Pension Scheme' items. At the bottom of the modal, there is a dropdown menu with three options: 'Selected entity only', 'Selected entity only', and 'Selected entities and associated entities'. The third option is selected. To the right of the dropdown are 'Select' and 'Close' buttons. In the background, the portal header shows 'Guernsey Financial Services Commission' and a user profile 'Joe Bloggs'. A navigation bar includes 'Home', 'My GFSC', and 'Pension'. A 'Welcome' message is visible, along with a 'Submissions Portal for Test Trust Company Limited' and a 'Select' button.

Action Required

The Action Required box appears when there is an outstanding action that requires your attention. Typically, this can include forms that require your input, user access requests or firm link requests if you are a Super User.



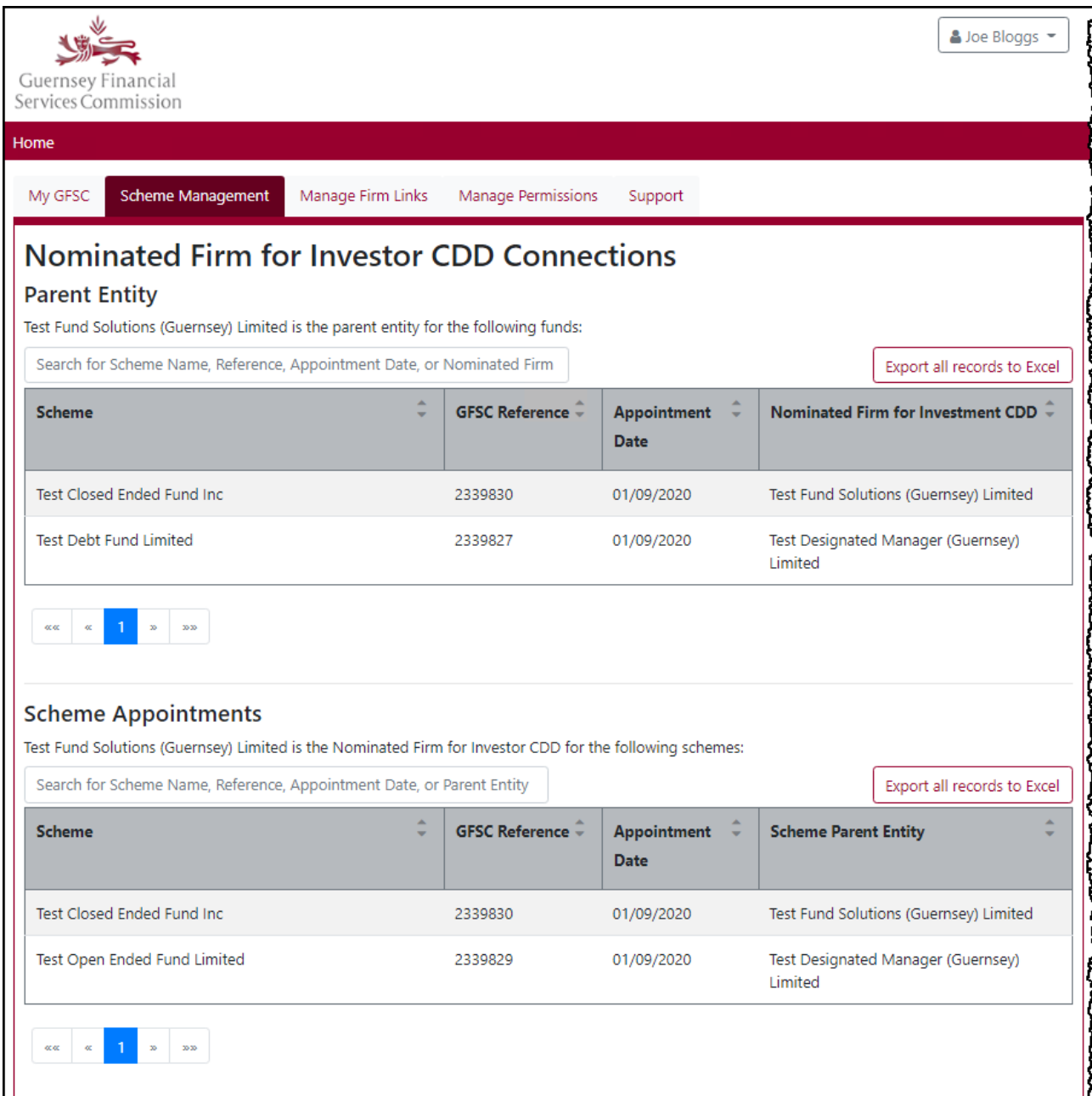
The screenshot shows the main dashboard of the GFSC Online Submissions Portal. At the top left is the logo and name of the Guernsey Financial Services Commission. On the top right is a user profile 'Joe Bloggs'. Below the logo is a 'Home' link. A navigation bar contains 'My GFSC', 'Scheme Management', 'Manage Firm Links' (with a notification icon), 'Manage Permissions', and 'Support'. The main heading is 'Welcome to Online Submissions'. A red-bordered box with a warning icon contains the text 'Action Required' and 'There are outstanding firm link requests requiring attention'. Below this is a notification: '19/02/2021: Test LP Insurance (Gsy) Ltd have requested a Firm Link' with a right-pointing arrow icon. Below the notification is a paragraph of text: 'This portal allows firms to submit certain returns and notifications to the Commission electronically. Please note that your access is controlled by your firm Super User.' followed by two links: 'To view the current list of forms, click here.' and 'If you would like to access the PQ Portal, please click here.' At the bottom, it says 'Submissions Portal for Test Fund Solutions (Guernsey) Limited'.

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Scheme Management tab

The *Scheme Management* tab shows the appointed Nominated Firm for Investor Customer Due Diligence ("NFFICDD") for an investment Scheme. Here you can see where your firm is the NFFICDD for a Scheme, regardless of whether the firm is the parent entity or not. If another firm is appointed the NFFICDD for a Scheme that you manage, that information is available here too.



Guernsey Financial Services Commission

Home

My GFSC **Scheme Management** Manage Firm Links Manage Permissions Support

Nominated Firm for Investor CDD Connections

Parent Entity

Test Fund Solutions (Guernsey) Limited is the parent entity for the following funds:

Search for Scheme Name, Reference, Appointment Date, or Nominated Firm [Export all records to Excel](#)

Scheme	GFSC Reference	Appointment Date	Nominated Firm for Investment CDD
Test Closed Ended Fund Inc	2339830	01/09/2020	Test Fund Solutions (Guernsey) Limited
Test Debt Fund Limited	2339827	01/09/2020	Test Designated Manager (Guernsey) Limited

« « 1 » »

Scheme Appointments

Test Fund Solutions (Guernsey) Limited is the Nominated Firm for Investor CDD for the following schemes:

Search for Scheme Name, Reference, Appointment Date, or Parent Entity [Export all records to Excel](#)

Scheme	GFSC Reference	Appointment Date	Scheme Parent Entity
Test Closed Ended Fund Inc	2339830	01/09/2020	Test Fund Solutions (Guernsey) Limited
Test Open Ended Fund Limited	2339829	01/09/2020	Test Designated Manager (Guernsey) Limited

« « 1 » »

The NFFICDD connections view on the Scheme Management tab is available to any user connected to an Investment Designated Manager, who has been granted 'Prepare' or 'Submit' permissions.

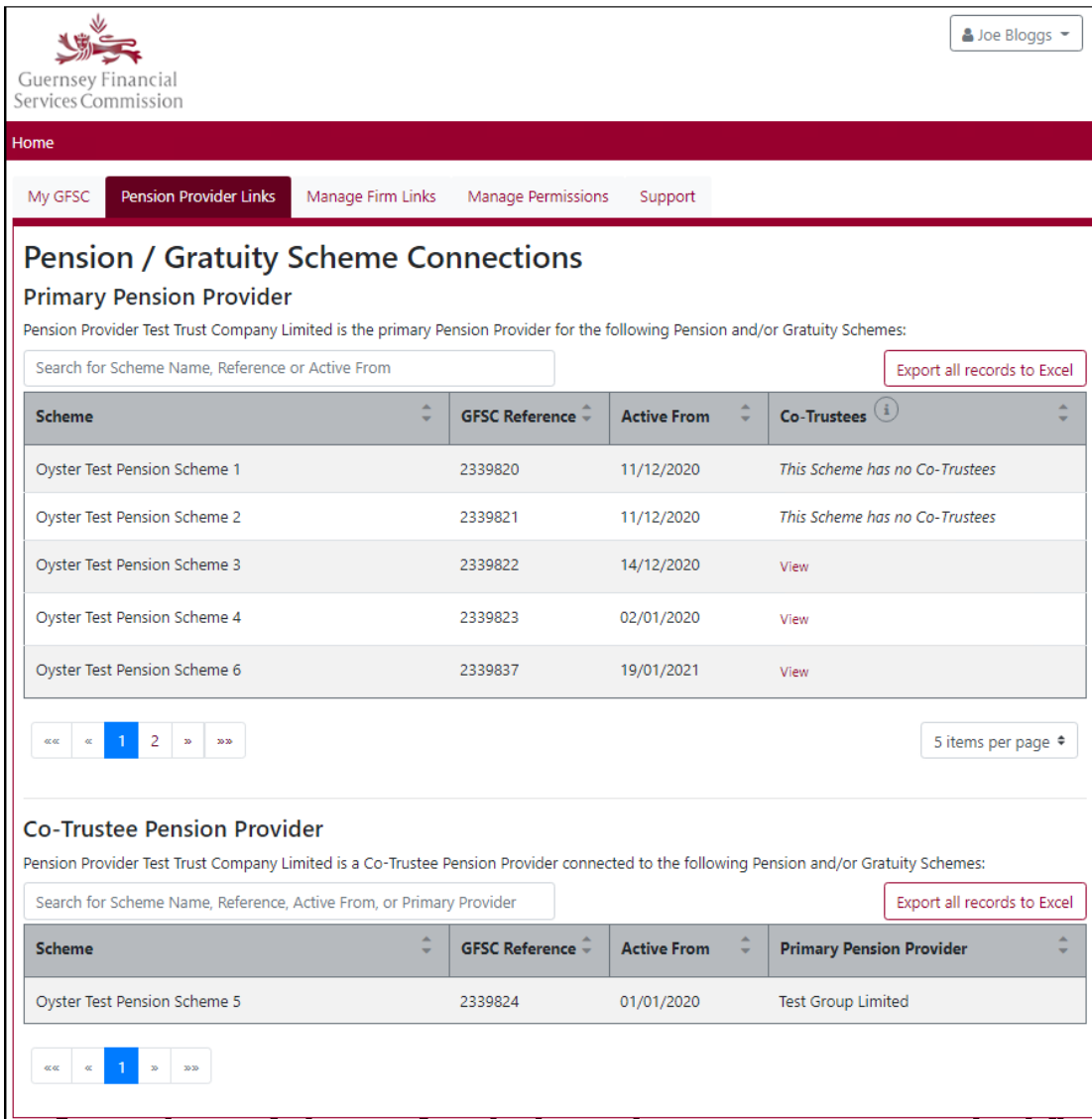
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Note: If you are no longer the NFFICDD for a Scheme but it is still listed, you need to contact the Designated Manager of that Scheme as the new NFFICDD must notify the Commission in order for the record to be updated.

Pension Provider Links tab

The *Pension Provider Links* tab is a view of the Pension Schemes and Gratuity Schemes that are connected to your firm. It is a Pension and Gratuity Scheme connections view.



Guernsey Financial Services Commission

Home

My GFSC Pension Provider Links Manage Firm Links Manage Permissions Support

Pension / Gratuity Scheme Connections

Primary Pension Provider

Pension Provider Test Trust Company Limited is the primary Pension Provider for the following Pension and/or Gratuity Schemes:

Search for Scheme Name, Reference or Active From Export all records to Excel

Scheme	GFSC Reference	Active From	Co-Trustees
Oyster Test Pension Scheme 1	2339820	11/12/2020	This Scheme has no Co-Trustees
Oyster Test Pension Scheme 2	2339821	11/12/2020	This Scheme has no Co-Trustees
Oyster Test Pension Scheme 3	2339822	14/12/2020	View
Oyster Test Pension Scheme 4	2339823	02/01/2020	View
Oyster Test Pension Scheme 6	2339837	19/01/2021	View

5 items per page

Co-Trustee Pension Provider

Pension Provider Test Trust Company Limited is a Co-Trustee Pension Provider connected to the following Pension and/or Gratuity Schemes:

Search for Scheme Name, Reference, Active From, or Primary Provider Export all records to Excel

Scheme	GFSC Reference	Active From	Primary Pension Provider
Oyster Test Pension Scheme 5	2339824	01/01/2020	Test Group Limited

The Pension and Gratuity Scheme connections view shows:

- The Pension Schemes and Gratuity Schemes for which your firm is the Primary Pension Provider
- The Co-trustee(s) for each Scheme, if there is a Co-trustee
- The Pension Scheme and Gratuity Schemes for which your firm is a Co-trustee

The *Pension Provider Links* tab is only visible to Super Users working for Pension Providers.

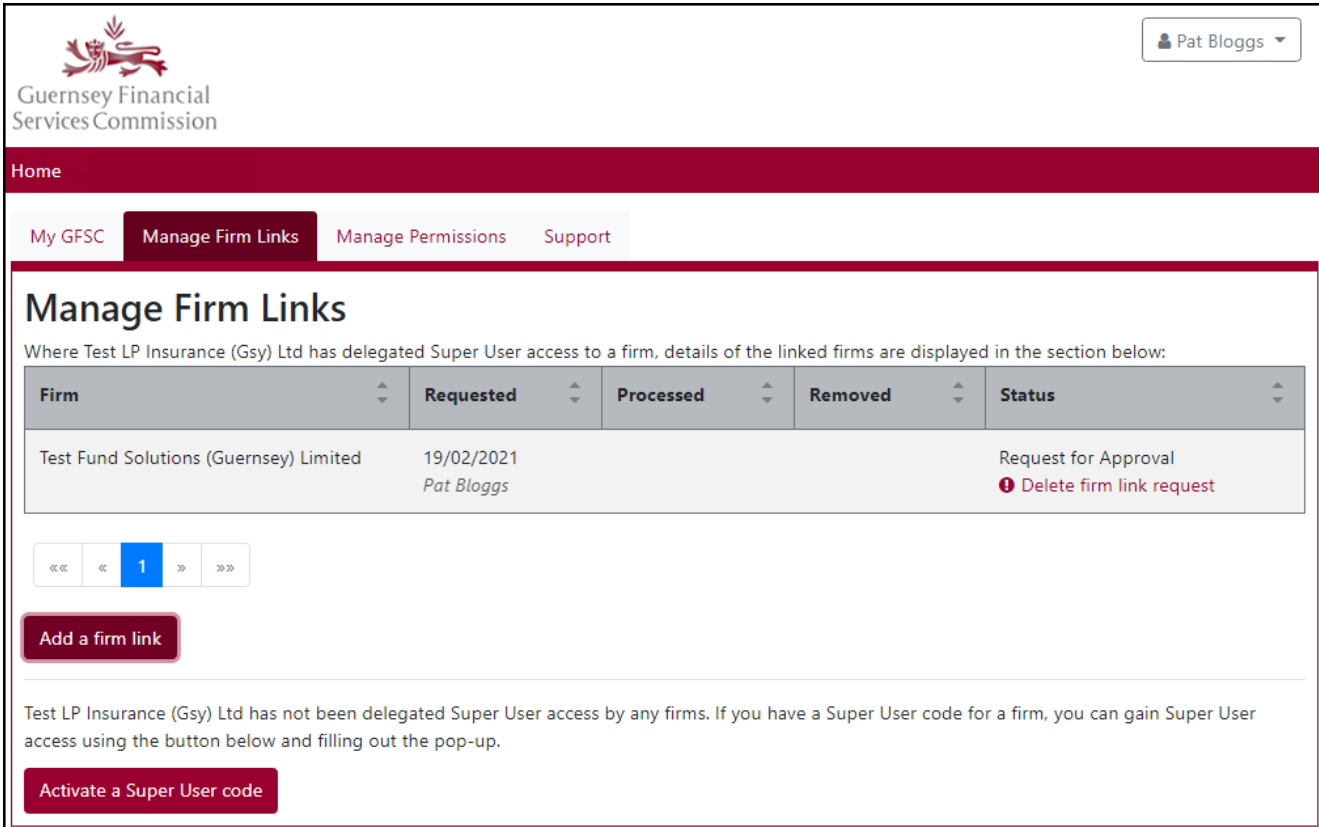
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Manage Firm Links tab

A firm link is where access can be shared between entities, allowing a Super User at one firm to manage another.

The *Manage Firm Links* tab is there to facilitate the linking of firms and help you manage those links. From here a Super User can delegate permissions to another firm or set up a link to manage it.



Guernsey Financial Services Commission

Home

My GFSC **Manage Firm Links** Manage Permissions Support

Manage Firm Links

Where Test LP Insurance (Gsy) Ltd has delegated Super User access to a firm, details of the linked firms are displayed in the section below:

Firm	Requested	Processed	Removed	Status
Test Fund Solutions (Guernsey) Limited	19/02/2021 <i>Pat Bloggs</i>			Request for Approval Delete firm link request

«« « 1 » »»

Add a firm link

Test LP Insurance (Gsy) Ltd has not been delegated Super User access by any firms. If you have a Super User code for a firm, you can gain Super User access using the button below and filling out the pop-up.

Activate a Super User code

To delegate permissions for your firm A, to another firm B, use the *Add a firm link* button. Firm B will need to confirm the link before they can manage firm A.

To create a link that allows you to manage another firm, either:

- Use the *Activate a Super User code* button and enter a Super User Code; or
- Ask a Super User at the other firm to add your firm as a link. You then need to confirm the link before you can manage that firm.

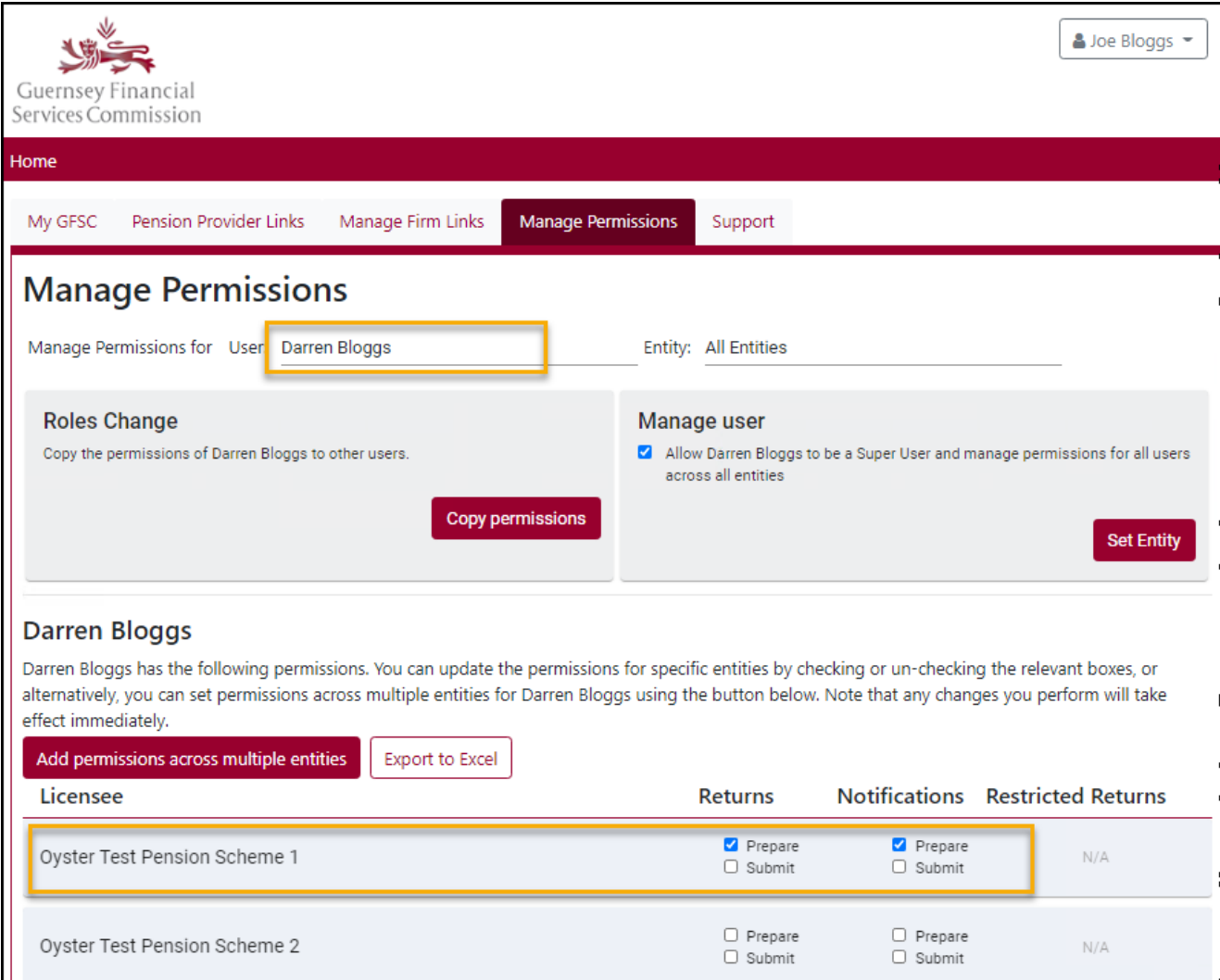
GFSC Online Submissions Portal

February 2021 updates – guidance notes

Manage Permissions tab

The Manage Permissions tab is only visible to Super Users. From here a Super User is able to administer user permissions for their firm, including being able to give themselves access to prepare and submit forms.

To assign 'Prepare' or/and 'Submit' permissions, first open the 'Manage Permissions' tab. From the All Users drop-down list, choose the user whose permissions you wish to edit. You will then be presented with a list of the entities you manage, select the entity for which you wish to assign the user permissions, and tick the *Prepare* or *Submit* checkboxes to grant prepare or submit permissions. The changes are automatically saved, refresh the page if you want to double check them.



Guernsey Financial Services Commission

Home

My GFSC Pension Provider Links Manage Firm Links **Manage Permissions** Support

Manage Permissions for User Darren Bloggs Entity: All Entities

Roles Change
Copy the permissions of Darren Bloggs to other users.
Copy permissions

Manage user
 Allow Darren Bloggs to be a Super User and manage permissions for all users across all entities
Set Entity

Darren Bloggs
Darren Bloggs has the following permissions. You can update the permissions for specific entities by checking or un-checking the relevant boxes, or alternatively, you can set permissions across multiple entities for Darren Bloggs using the button below. Note that any changes you perform will take effect immediately.
Add permissions across multiple entities **Export to Excel**

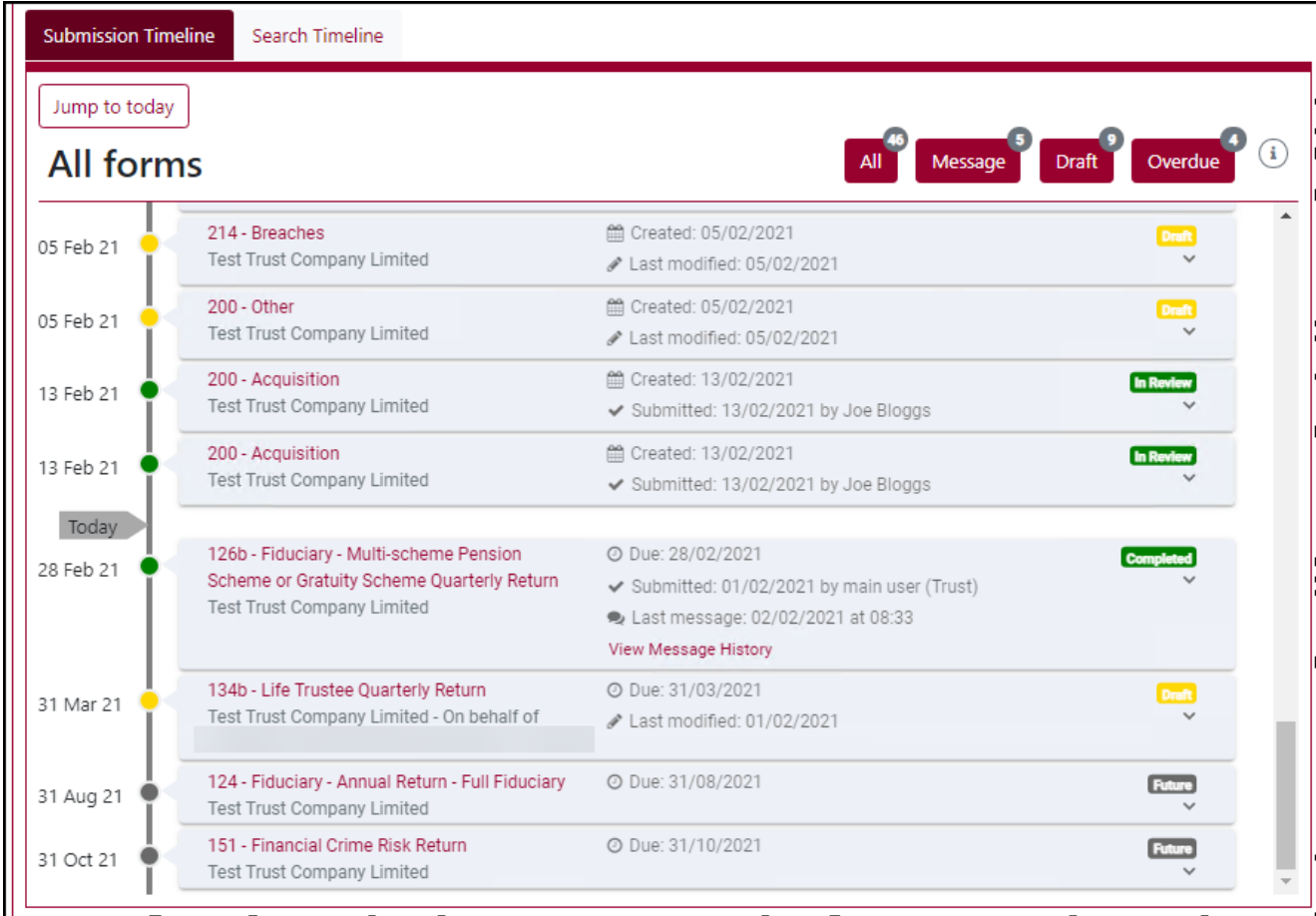
Licensee	Returns	Notifications	Restricted Returns
Oyster Test Pension Scheme 1	<input checked="" type="checkbox"/> Prepare <input type="checkbox"/> Submit	<input checked="" type="checkbox"/> Prepare <input type="checkbox"/> Submit	N/A
Oyster Test Pension Scheme 2	<input type="checkbox"/> Prepare <input type="checkbox"/> Submit	<input type="checkbox"/> Prepare <input type="checkbox"/> Submit	N/A

GFSC Online Submissions Portal

February 2021 updates – guidance notes

Submission Timeline

The *Submission Timeline* is a chronological list of returns and notifications. Any returns that are due within the next year will appear, alongside any notifications that have been started. Anything that has been submitted to, and any responses from, the Commission will also be shown.



The screenshot shows the 'Submission Timeline' interface. At the top, there are tabs for 'Submission Timeline' and 'Search Timeline'. Below this is a 'Jump to today' button. The main area is titled 'All forms' and features filter buttons for 'All' (46), 'Message' (5), 'Draft' (9), and 'Overdue' (4). The timeline itself is a vertical axis with dates from 05 Feb 21 to 31 Oct 21. Each date has a colored dot: yellow for draft, green for submitted, and grey for future. The forms listed are:

- 05 Feb 21: 214 - Breaches, Test Trust Company Limited, Created: 05/02/2021, Last modified: 05/02/2021, Draft.
- 05 Feb 21: 200 - Other, Test Trust Company Limited, Created: 05/02/2021, Last modified: 05/02/2021, Draft.
- 13 Feb 21: 200 - Acquisition, Test Trust Company Limited, Created: 13/02/2021, Submitted: 13/02/2021 by Joe Bloggs, In Review.
- 13 Feb 21: 200 - Acquisition, Test Trust Company Limited, Created: 13/02/2021, Submitted: 13/02/2021 by Joe Bloggs, In Review.
- Today (28 Feb 21): 126b - Fiduciary - Multi-scheme Pension Scheme or Gratuity Scheme Quarterly Return, Test Trust Company Limited, Due: 28/02/2021, Submitted: 01/02/2021 by main user (Trust), Last message: 02/02/2021 at 08:33, Completed.
- 31 Mar 21: 134b - Life Trustee Quarterly Return, Test Trust Company Limited - On behalf of, Due: 31/03/2021, Last modified: 01/02/2021, Draft.
- 31 Aug 21: 124 - Fiduciary - Annual Return - Full Fiduciary, Test Trust Company Limited, Due: 31/08/2021, Future.
- 31 Oct 21: 151 - Financial Crime Risk Return, Test Trust Company Limited, Due: 31/10/2021, Future.

The buttons *Message*, *Draft* and *Overdue* are pre-defined filters that can be used to quickly filter the list of forms being displayed on the timeline. The numbers on each of the buttons represent the number of records in those states. The *Message* button will return a list of forms that have Secure Messages against them.

What do the colours mean on the Submission Timeline?

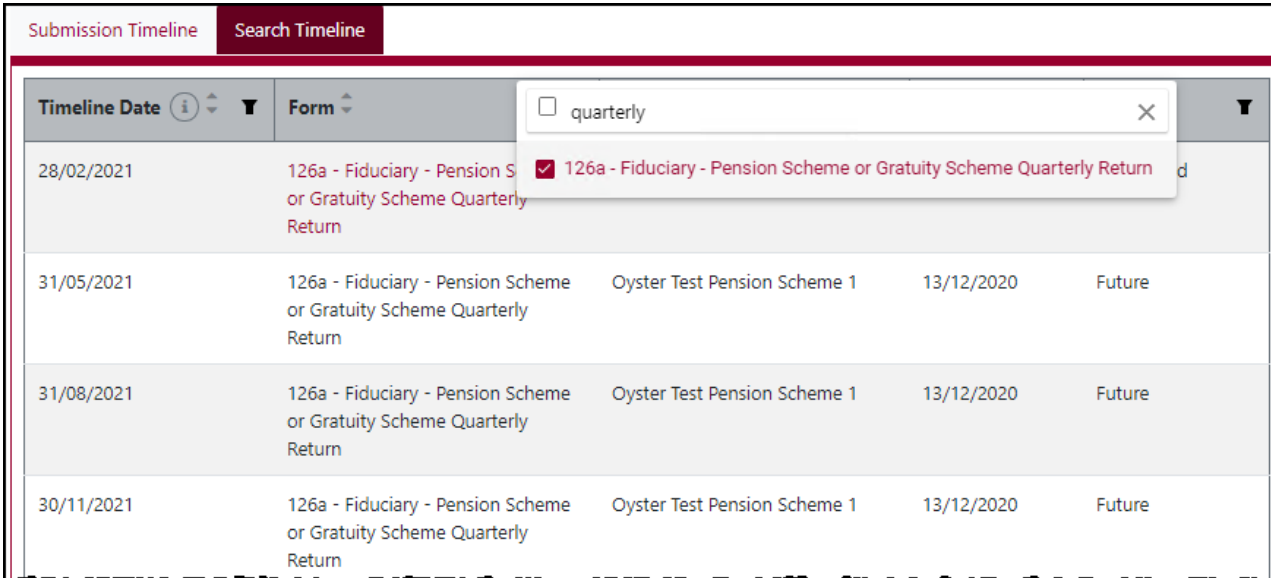
- Red - indicates that a return is overdue.
- Green - indicates that a form has been submitted to the Commission.
- Orange - indicates that a return is due within 2 weeks. Any returns (whether or not they have been started) will appear in this colour.
- Yellow - indicates that the form can be edited. Any returns (whether or not they have been started) and any notifications that are in draft will appear in this colour.
- Grey - indicates a return that is due in the future but is not yet ready to be started as the reporting period end has not yet passed.

GFSC Online Submissions Portal

February 2021 updates – guidance notes

Search Timeline

For a more powerful and flexible Submission Timeline filter, use the Search Timeline feature.



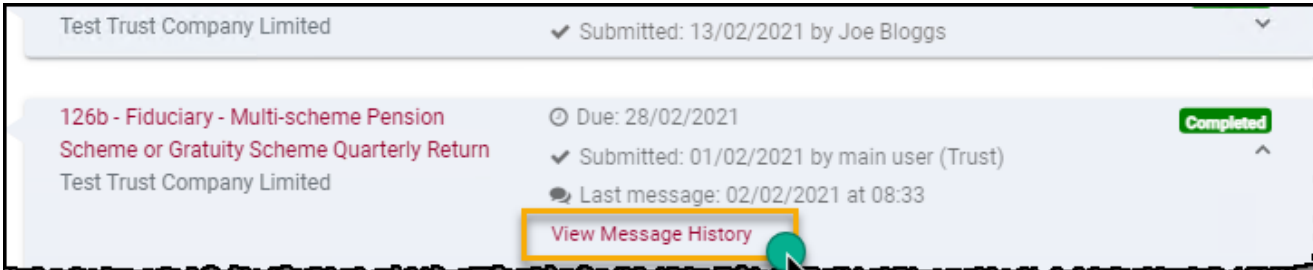
Timeline Date	Form			
28/02/2021	126a - Fiduciary - Pension Scheme or Gratuity Scheme Quarterly Return			
31/05/2021	126a - Fiduciary - Pension Scheme or Gratuity Scheme Quarterly Return	Oyster Test Pension Scheme 1	13/12/2020	Future
31/08/2021	126a - Fiduciary - Pension Scheme or Gratuity Scheme Quarterly Return	Oyster Test Pension Scheme 1	13/12/2020	Future
30/11/2021	126a - Fiduciary - Pension Scheme or Gratuity Scheme Quarterly Return	Oyster Test Pension Scheme 1	13/12/2020	Future

The Search Timeline feature allows filters on:

- Due date for returns
- Created on date for notifications
- Form name or form number
- Form status
- Entity name

Secure Messages

Secure messages can now be read directly from the Submission Timeline.



Entity Name	Status	Submitted By	Submitted Date
Test Trust Company Limited	Submitted	Joe Bloggs	13/02/2021
126b - Fiduciary - Multi-scheme Pension Scheme or Gratuity Scheme Quarterly Return	Completed	main user (Trust)	01/02/2021
Test Trust Company Limited			02/02/2021 at 08:33

[View Message History](#)

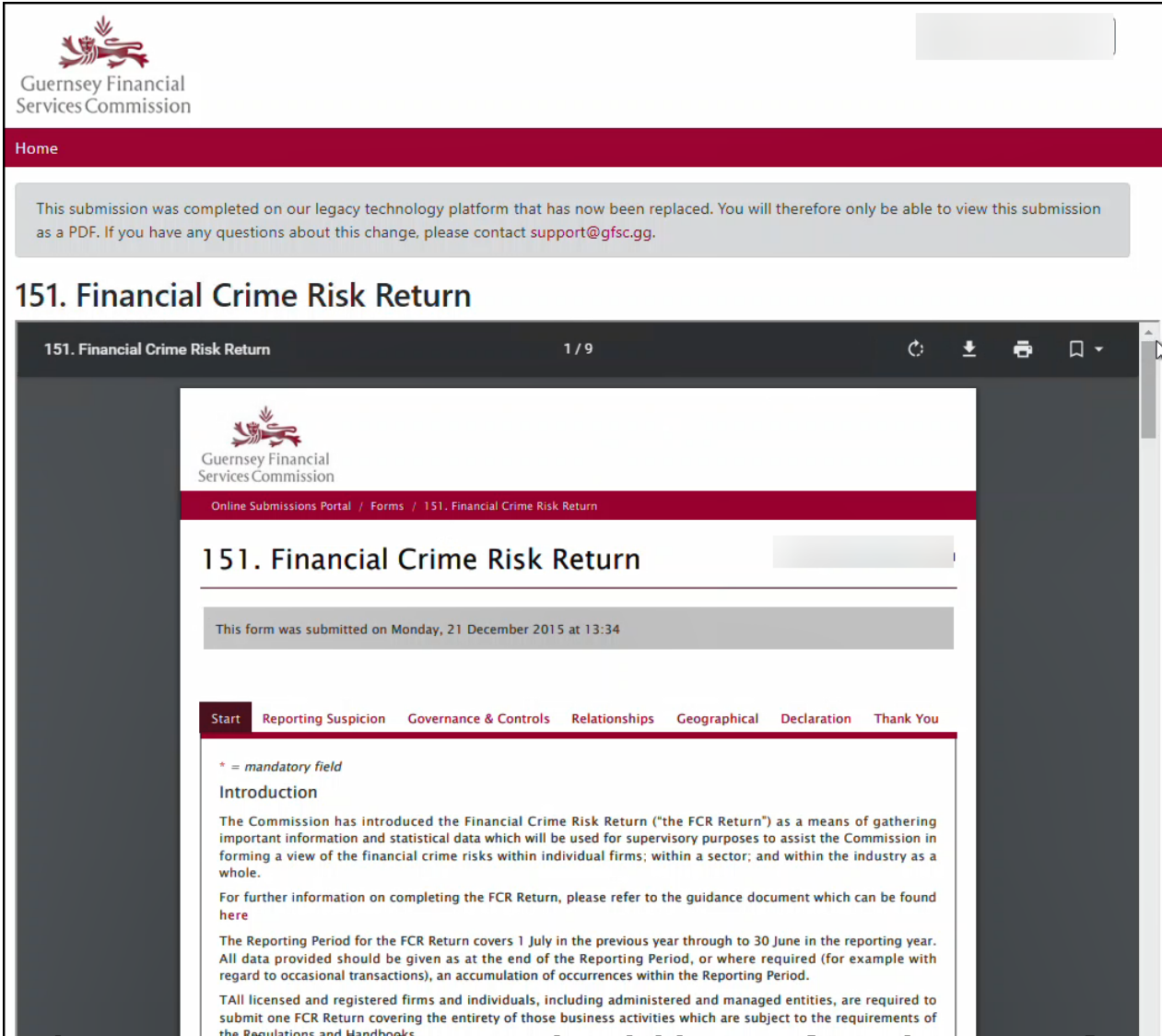
GFSC Online Submissions Portal

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Legacy Forms PDF view

Now that the OS portal has been upgraded, you will no longer have direct access to any forms that were submitted on the Commissions now decommissioned legacy technology platform. Therefore, going forward, when you open a record on the Submission Timeline that belongs to a legacy form, a PDF snapshot of that submission will be displayed instead of the form.

The PDF can be downloaded or printed if required.



The screenshot displays the Guernsey Financial Services Commission's Online Submissions Portal. At the top, the logo and name of the Commission are visible. A navigation bar includes a 'Home' link. A grey notification box states: "This submission was completed on our legacy technology platform that has now been replaced. You will therefore only be able to view this submission as a PDF. If you have any questions about this change, please contact support@gfsc.gg." Below this, the title "151. Financial Crime Risk Return" is shown. The main content area is a PDF viewer showing the form's introduction. The PDF header includes the Commission's logo and the title "151. Financial Crime Risk Return". A breadcrumb trail reads "Online Submissions Portal / Forms / 151. Financial Crime Risk Return". The submission date is noted as "Monday, 21 December 2015 at 13:34". A navigation menu at the bottom of the PDF includes "Start", "Reporting Suspicion", "Governance & Controls", "Relationships", "Geographical", "Declaration", and "Thank You". The introduction text explains the purpose of the FCR Return and provides reporting details.

GFSC Online Submissions Portal

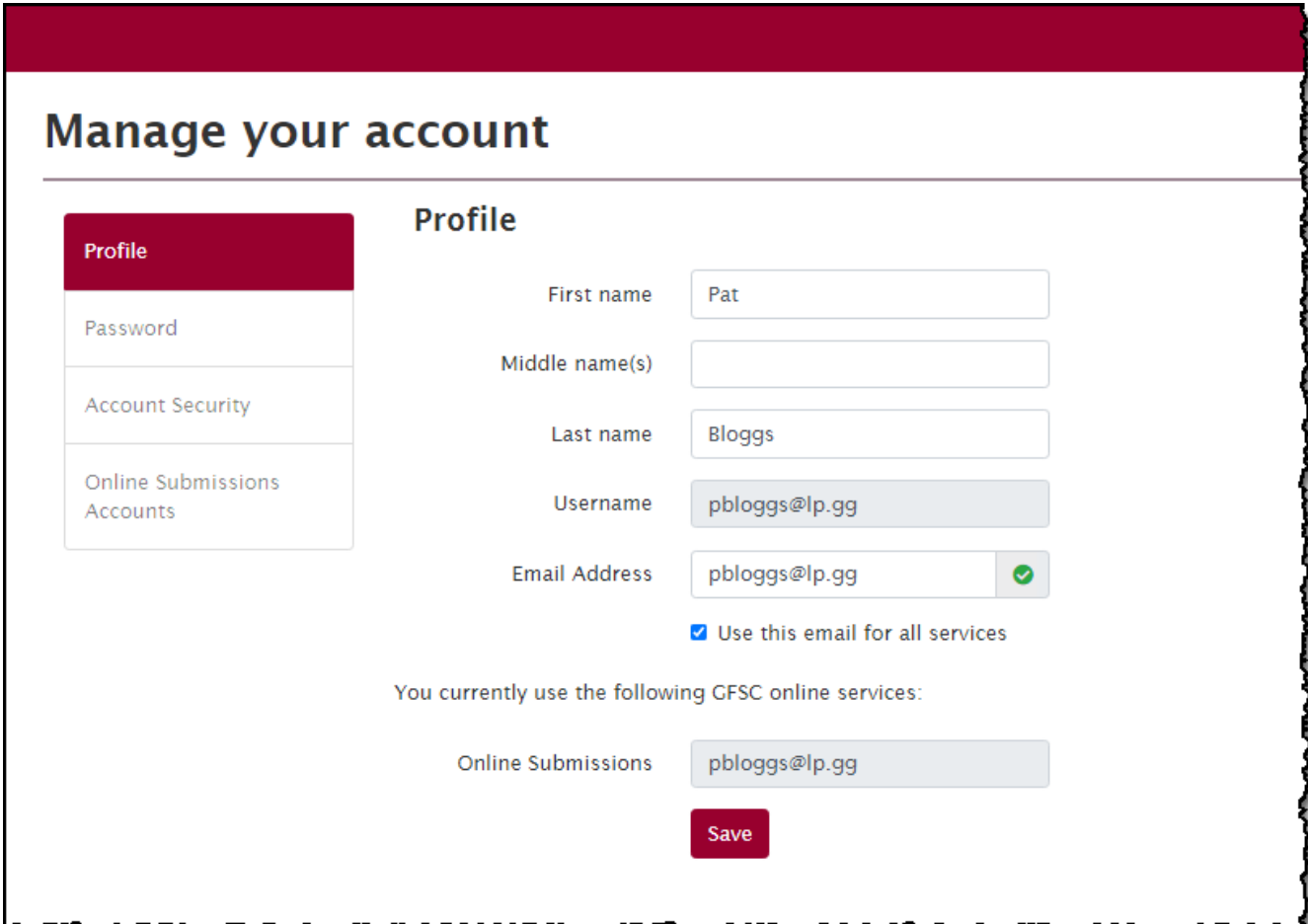
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Online Services account- Profile changes

Note: when you select the options for Profile, Change Password, Account Security, or OS Accounts from the name dropdown in the OS portal, the details will be displayed in a new window. Once you have made the changes please close the window – your OS portal will still be available in the original window.

Change name or email address

In your profile, update your names or change your email address:



The screenshot shows the 'Manage your account' page with a sidebar menu on the left containing 'Profile', 'Password', 'Account Security', and 'Online Submissions Accounts'. The 'Profile' section is active and contains the following fields:

- First name: Pat
- Middle name(s):
- Last name: Bloggs
- Username: pbloggs@lp.gg
- Email Address: pbloggs@lp.gg (with a green checkmark icon)

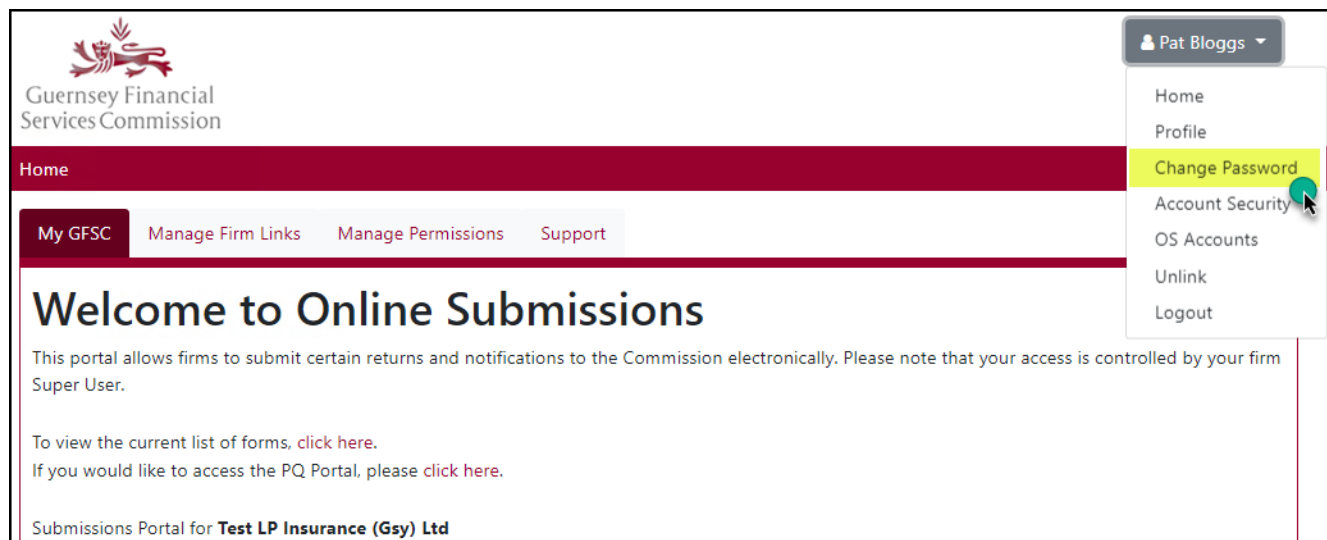
Below the email field, there is a checked checkbox labeled 'Use this email for all services'. Underneath, it states 'You currently use the following GFSC online services:' followed by a field for 'Online Submissions' containing 'pbloggs@lp.gg'. A red 'Save' button is located at the bottom of the form.

GFSC Online Submissions Portal

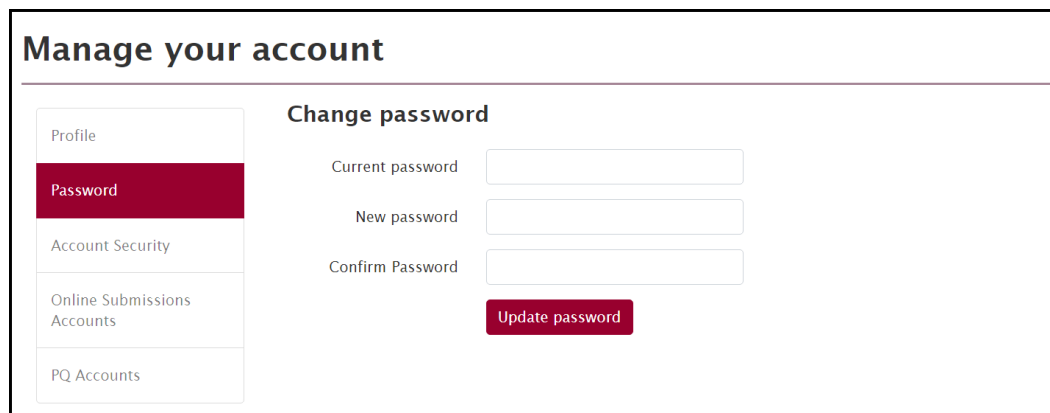
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Change password

In your profile, change your password:



The screenshot shows the user interface of the Guernsey Financial Services Commission Online Submissions Portal. At the top left is the logo and name of the Commission. A navigation bar includes 'Home', 'My GFSC', 'Manage Firm Links', 'Manage Permissions', and 'Support'. A user profile dropdown menu is open, showing options: Home, Profile, Change Password (highlighted in yellow), Account Security, OS Accounts, Unlink, and Logout. The main content area features a 'Welcome to Online Submissions' heading, a brief explanation of the portal's purpose, and links to view forms and access the PQ Portal. At the bottom, it identifies the user as 'Test LP Insurance (Gsy) Ltd'.



The screenshot shows the 'Manage your account' page. On the left is a sidebar menu with options: Profile, Password (selected), Account Security, Online Submissions Accounts, and PQ Accounts. The main content area is titled 'Change password' and contains three input fields: 'Current password', 'New password', and 'Confirm Password'. Below these fields is a red 'Update password' button.

Link OS and PQ accounts

Linked accounts – automatically, using the same email

If you had an account in both the Online Submissions and PQ Portals (at the point of the PQ Portal upgrade in June 2020), which used the same email address, then the accounts will automatically have been linked. **To log into either the OS or PQ portal you will need to use the OS password.** If you do not know the OS password, use the “Forgot your password?” button on the login page, to reset the password.

Linking Portal accounts manually

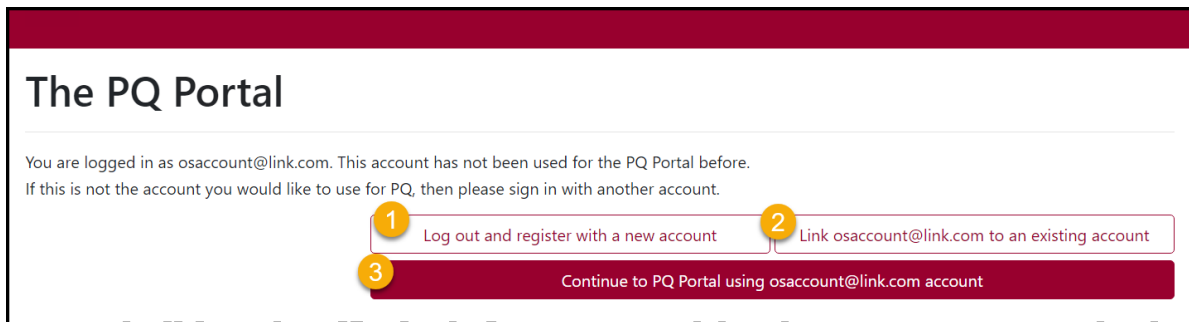
The following steps can be followed if you are logging onto one portal for the first time with the account credentials of the other portal i.e. OS with PQ, or vice-versa.

GFSC Online Submissions Portal

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If you have an existing OS account, but not a PQ account

- Type the URL for the PQ Portal “online.gfsc.gg” into your browser and press enter
- Enter the email address and password that you normally use for your OS account and click on ‘Sign-in’
- The following screen is displayed:



The PQ Portal

You are logged in as osaccount@link.com. This account has not been used for the PQ Portal before.
If this is not the account you would like to use for PQ, then please sign in with another account.

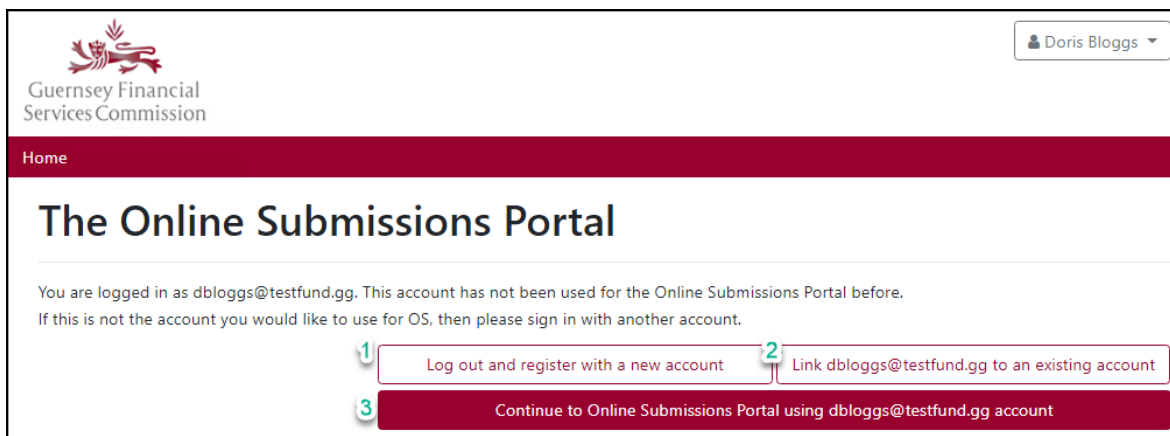
1 Log out and register with a new account 2 Link osaccount@link.com to an existing account

3 Continue to PQ Portal using osaccount@link.com account

1. If you already have a PQ account and you want it to remain un-linked from your OS account, choose option 1. You will be logged out and taken back to the Register/Sign In page.
2. If you already have a PQ account and you want to link it to your OS account, choose option 2. This will take you to the ‘Manage your account’, ‘Link Accounts’ page where you can Sign In using your PQ account credentials. Once the accounts are linked, you can use either set of credentials to log into the PQ Portal.
3. If you do not have a PQ account and want to use the same login as your OS account, choose option 3. If you choose this option, you will be presented with a pop-up screen requiring you to add your Date of Birth – this is a requirement for anyone using the PQ Portal.

If you have an existing PQ account, but not an OS account

- Type the URL for the OS Portal “submit.gfsc.gg” into your browser and press enter
- Enter the email address and password that you normally use for your PQ account and click on ‘Sign-in’
- The following screen is displayed:



Guernsey Financial
Services Commission

Home

The Online Submissions Portal

You are logged in as dblogs@testfund.gg. This account has not been used for the Online Submissions Portal before.
If this is not the account you would like to use for OS, then please sign in with another account.

1 Log out and register with a new account 2 Link dblogs@testfund.gg to an existing account

3 Continue to Online Submissions Portal using dblogs@testfund.gg account

1. If you already have an OS account and you want it to remain un-linked from your PQ account, choose option 1. You will be logged out and taken back to the Register/Sign In page.

GFSC Online Submissions Portal

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2. If you already have an OS account and you want to link it to your PQ account, choose option 2. This will take you to the 'Manage your account', 'Link Accounts' page where you can Sign In using your OS account credentials. Once the accounts are linked, you can use either set of credentials to log into the OS Portal.
3. If you do not have an OS account and want to use the same login as your PQ account, choose option 3.

Un-link OS and PQ accounts

In the instance where you have both a PQ and OS account that are linked, where the PQ login is for your individual PQ and the OS login is for your firm account, if you leave the firm, you will want to unlink one of those accounts. For example:

Where you have registered an account me@work1.com which is your work email and also registered an account me@home.com for your PQ and then linked those accounts, on leaving the firm, you should unlink the me@work1.com account. When you start work at another firm, then you can register an account with the email me@work2.com and link that to your account.

To unlink an OS account from a PQ account, or two PQ accounts:

- In the PQ Portal, select your name from the top right-hand-side.
- Select PQ Accounts;
- Select either PQ Accounts or OS Accounts (whichever is relevant) from the left-hand menu
- Click on the Unlink button next to the account you are removing

It should be noted, that once you have unlinked an account, it can only be reinstated by repeating the steps to Link OS and PQ accounts.

Super User

The Commission will issue a Super User code to the managing director when an entity is first licensed/registered. If you have been allocated a Super User code, then you are responsible for administering access to your firm on the OS portal, which includes approving requests from new users to be linked to your firm for new users and granting *Prepare* and *Submit* form permissions to those users.

A firm must have at least one Super User at any time, however, the Commission recommends that each firm has at least two Super User to cover absences from the office. See Add another Super User to your firm.

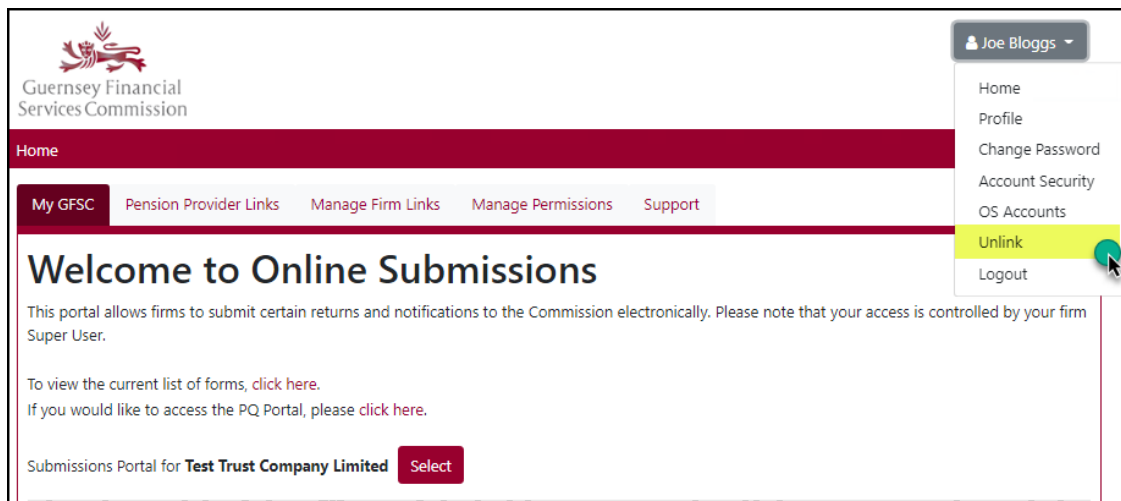
Unlink an OS portal account from a Firm

Your own account:

- Log into the OS Portal
- From the User drop-down menu in the top right select 'Unlink'

GFSC Online Submissions Portal

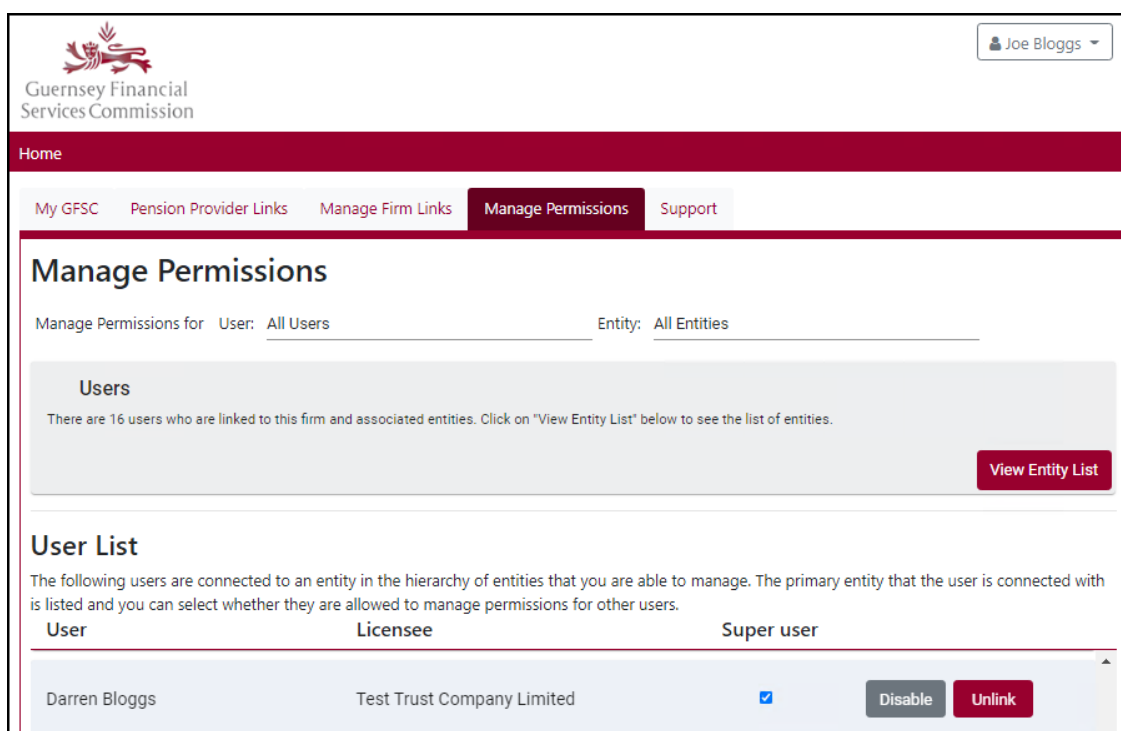
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A pop-up screen will ask you to confirm the action.

Unlink another user (you must be a Super User to do this):

- Log into the OS Portal and open the *Manage Permissions* tab
- Click *View User List*
- Find the user in the list
- If they are a Super User, untick the *Super User* checkbox
- Click *Unlink*



GFSC Online Submissions Portal

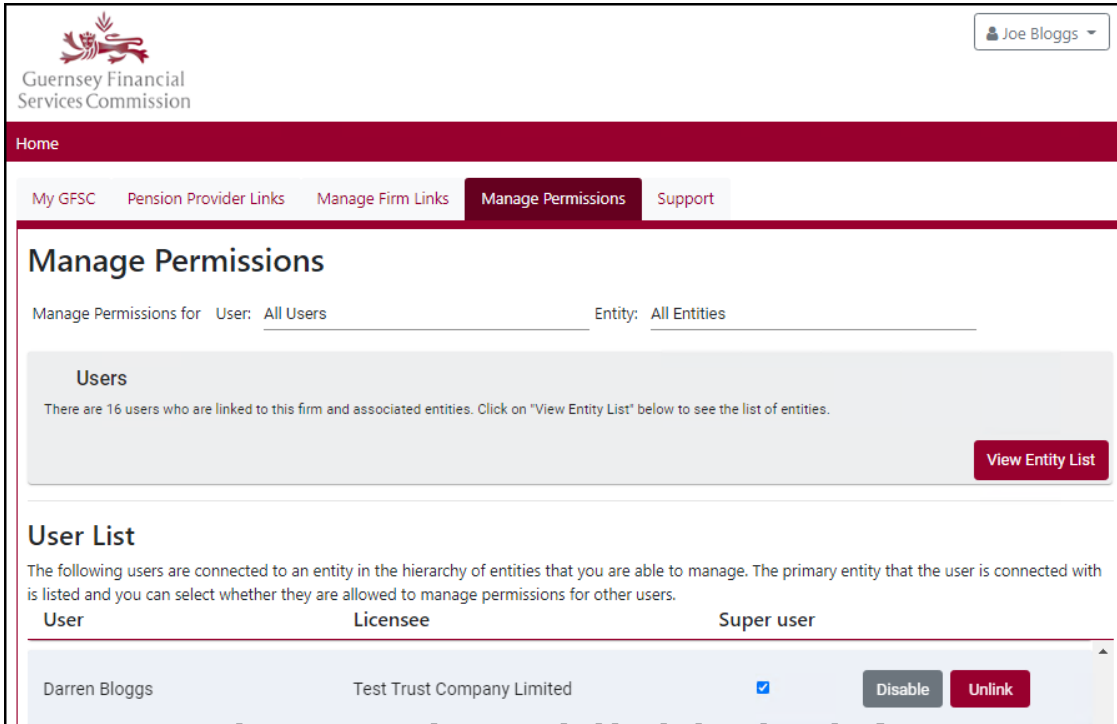
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A pop-up screen will ask you to confirm the action.

Disable an OS portal account:

(you must be a Super User to do this)

- Log into the OS Portal and open the *Manage Permissions* tab
- Click *View User List*
- Find the user in the list
- If they are a Super User, untick the *Super User* checkbox
- Click *Disable* and it will change to an *Enable* button



The screenshot shows the 'Manage Permissions' page in the OS Portal. At the top, there is a navigation bar with 'Home', 'My GFSC', 'Pension Provider Links', 'Manage Firm Links', 'Manage Permissions' (selected), and 'Support'. Below the navigation bar, the page title is 'Manage Permissions'. There are two dropdown menus: 'User: All Users' and 'Entity: All Entities'. Below these, there is a section titled 'Users' with a description: 'There are 16 users who are linked to this firm and associated entities. Click on "View Entity List" below to see the list of entities.' A 'View Entity List' button is visible. Below this, there is a section titled 'User List' with a description: 'The following users are connected to an entity in the hierarchy of entities that you are able to manage. The primary entity that the user is connected with is listed and you can select whether they are allowed to manage permissions for other users.' Below the description is a table with columns: 'User', 'Licensee', and 'Super user'. The table contains one row: 'Darren Bloggs', 'Test Trust Company Limited', and a checked checkbox. Below the table are 'Disable' and 'Unlink' buttons.

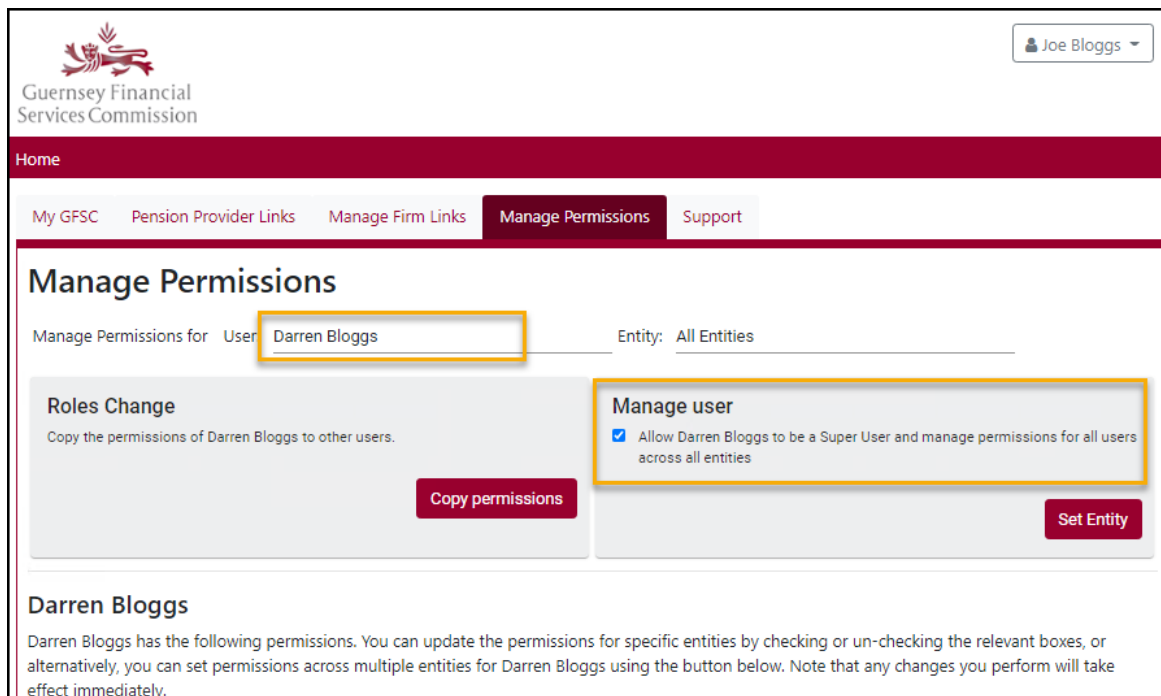
Add another Super User to your firm:

(you must be a Super User to do this)

- Log into the OS Portal and open the *Manage Permissions* tab
- From the All Users drop-down list, select the user you want to assign the permissions to
- Tick the *Manage User* checkbox

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The screenshot shows the 'Manage Permissions' interface for user 'Darren Bloggs'. The user name is highlighted in a yellow box. Below the user selection, there are two main sections: 'Roles Change' and 'Manage user'. The 'Manage user' section contains a checked checkbox for 'Allow Darren Bloggs to be a Super User and manage permissions for all users across all entities', which is also highlighted in a yellow box. A 'Set Entity' button is located at the bottom right of this section.

Manage Permissions

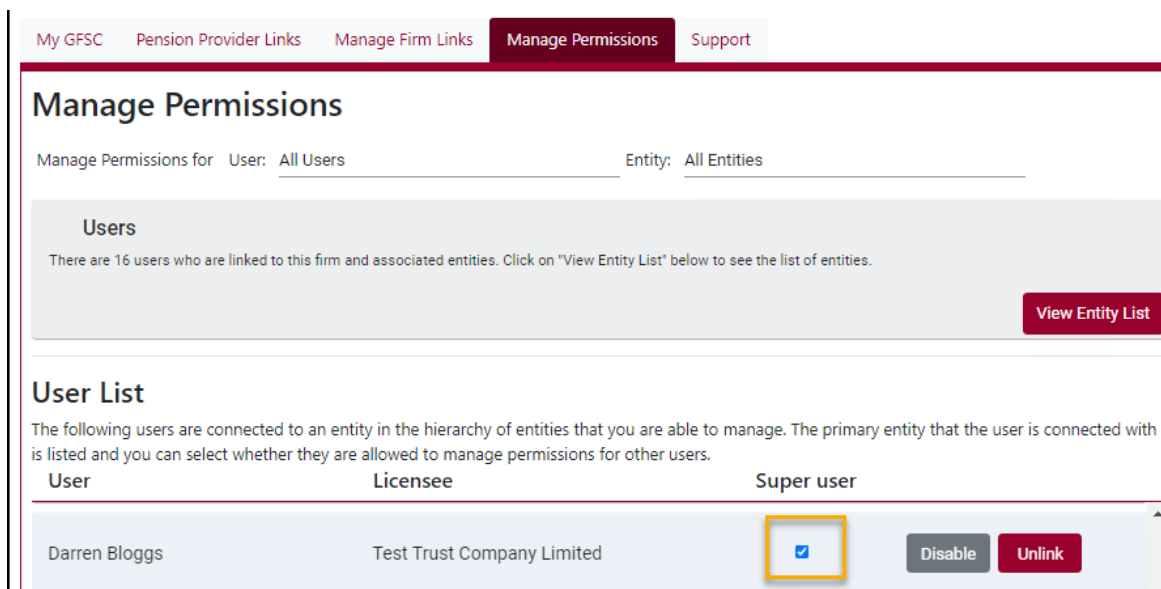
Manage Permissions for User: Darren Bloggs Entity: All Entities

Roles Change
Copy the permissions of Darren Bloggs to other users.
[Copy permissions](#)

Manage user
 Allow Darren Bloggs to be a Super User and manage permissions for all users across all entities
[Set Entity](#)

Darren Bloggs
Darren Bloggs has the following permissions. You can update the permissions for specific entities by checking or un-checking the relevant boxes, or alternatively, you can set permissions across multiple entities for Darren Bloggs using the button below. Note that any changes you perform will take effect immediately.

Note: If you set the *User* drop-down list to *All Users*, you can also grant Super User permissions from within the *View User List*.



The screenshot shows the 'Manage Permissions' interface for user 'All Users'. The user name is highlighted in a yellow box. Below the user selection, there are two main sections: 'Users' and 'User List'. The 'User List' section contains a table with columns for 'User', 'Licensee', and 'Super user'. The 'Super user' column for 'Darren Bloggs' has a checked checkbox, which is highlighted in a yellow box. 'Disable' and 'Unlink' buttons are located to the right of the checkbox.

Manage Permissions

Manage Permissions for User: All Users Entity: All Entities

Users
There are 16 users who are linked to this firm and associated entities. Click on "View Entity List" below to see the list of entities.
[View Entity List](#)

User List
The following users are connected to an entity in the hierarchy of entities that you are able to manage. The primary entity that the user is connected with is listed and you can select whether they are allowed to manage permissions for other users.

User	Licensee	Super user
Darren Bloggs	Test Trust Company Limited	<input checked="" type="checkbox"/> Disable Unlink