TSCA DocuSign steps for marine port applicants

Transport Canada's Transportation Security Clearance (TSC) Modernization team is proud to share that our TSC application and signing process is all online!

In addition to offering an online TSC application (TSCA), Transport Canada has joined with DocuSign to offer you a digital signing experience, and a secure location to attach your supporting documentation, such as pictures of your identification.

Once you submit your TSCA, DocuSign will create a secure, digital envelope to send your application and supporting documentation only to the people who need to sign it, ensuring they only see the information they need to. Your personal information is always protected by the Canadian Privacy Act.

These guidance materials contain everything you need to know about the process, who is involved and how, and step-by-step instructions on how to complete your application, upload your supporting documentation, and sign your application.

In this guide:

1. The TSCA process

Your company or marine enrolment site will send you a TSCA file via email, with company information and information about your position already filled in. You can upload this file to the online TSCA and complete the rest of the application. Once you are done, you can send it back to the marine enrolment site to review it for accuracy before you submit it.

Once you have submitted your completed TSCA, you will receive an email from TSCA confirming your submission, and an email from DocuSign asking you to sign your application and upload your supporting documentation.

Important note: It is extremely important that you prepare high-quality scans or photos of the supporting documentation you require based on the information you put on your application. Once you

February 2023

TSCA DocuSign steps for marine port applicants

submit your application, you will receive an email that lists the supporting documentation you need to attach to your application. Please refer to section 5 in this package for more information on preparing this documentation.

Once you have signed your application and uploaded your documentation, DocuSign will send your envelope to the pass control office at your marine port. Please follow your local enrolment site's process for booking a verification appointment.

When you go in for your verification appointment, bring all of your original supporting documentation as well as a piece of government-issued photo ID with you. The enrolment officer will review your application and attached supporting documentation to make sure everything is correct and can be read, and will compare it against your original documents to make sure it's all correct, take your fingerprints, and send it all to Transport Canada, who will conduct background checks to approve your security clearance.

This guidance package will walk you through the process step-by-step. Read and follow them carefully! If you need any assistance and can't find the answer here, please reach out to your employer.

2. Definitions

Transport Canada: Transport Canada is the government agency who is responsible for developing regulations, policies, and services for road, rail, marine and air transportation in Canada.

Transportation Security Clearance Application: The Transportation Security Clearance Application is the online application that an applicant who is seeking employment at a secured air or marine port completes, in order to submit their information to Transport Canada for verification.

Transportation Security Clearance program: The Transportation Security Clearance program is the team at Transport Canada responsible for developing and maintaining the online application, ensuring a smooth process from application to approval, and facilitating applicant background checks to determine eligibility for security clearance.

Authorized signatory: A designated individual at the port office, who is eligible to sign your application. Their name, email address, and signature are on file with Transport Canada to ensure only designated individuals are signing applications.

DocuSign: DocuSign is a system Transport Canada has procured that allows various signers to sign and send a document securely and digitally. DocuSign can restrict access to certain personal information based on who is viewing the document, and guide the appropriate individual to sign, initial, answer questions, or upload documentation, as needed.

DocuSign envelope: A DocuSign envelope is a digital envelope created when an applicant submits a TSCA. It contains the application and supporting documentation, a unique identification number, and is sent digitally and securely to all signing parties.

Enrolment site: An enrolment site is the pass control office at airports or marine ports who acts as a conduit between the applicant and Transport Canada. Enrolment sites issue and manage applicants' security clearances and passes.

TSCA DocuSign steps for marine port applicants

Enrolment officer: An enrolment officer works at an enrolment site. They support an applicant by reviewing their application and supporting documentation, taking their fingerprints, and sending the completed application and fingerprints to Transport Canada.

Verification appointment: An applicant attends a verification appointment at their enrolment site after they sign their application and upload their supporting documentation. During the verification appointment, an enrolment officer verifies an applicant's application, identification, and supporting documentation, and takes the applicant's fingerprints. Each enrolment site books verification appointments in a unique way, so applicants need to contact their enrolment site directly for instructions on how to book.

3. Completing your Transportation Security Clearance Application (TSCA)

You must submit your application through the online (TSC) Application.

To ensure the company's information is entered correctly, your employer, hiring company, or marine enrolment site will start your TSCA, then send it to you via email to complete. They will fill out the first two sections, Application Details and Requesting Authority, with appropriate details. Please wait until you receive the saved application file to start your application.

3a. Starting from a saved application

Once your company or enrolment site has filled in the first two sections of your TSCA, you will receive an email from no-reply-ne-pas-respondre.TSC-HST@tc.gc.ca with the subject line, "Saved TSCA Application – [MM/DD/YYYY]."

The .tscx file will be attached, along with instructions and the link for you to continue your TSCA. Do not try to open the file – you won't be able to as you do not have an app on your device that can read it. However, the online TSCA can read the file and will populate the saved information.
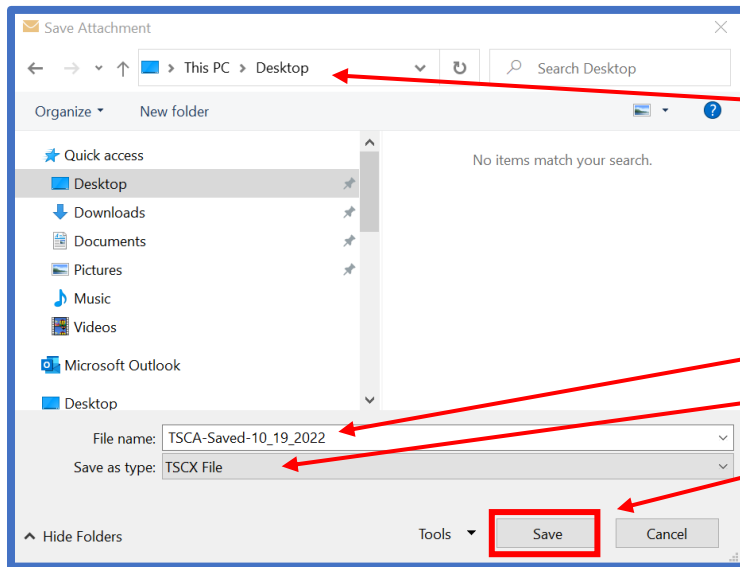
Step 1 – Save the .tscx file
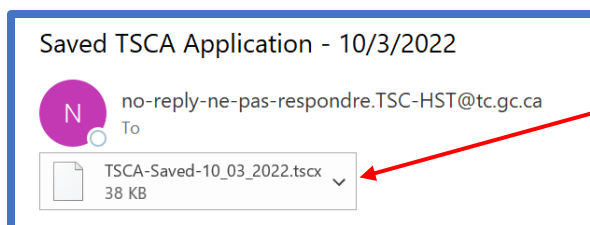
To save the .tscx file from the email to your computer or mobile device, select the down arrow on the right side of the attachment to open the action menu.

Select "Save As" to save it to your device.
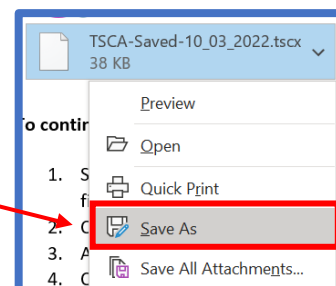
TSCA DocuSign steps for marine port applicants

We recommend saving the file to your desktop or another easy-to-remember location.

If you're working on a public computer, delete your file when you're done.

The file name will populate as "TSCA-Saved-MM_DD_YYYY." **Do not rename the file.**

Ensure it saves as a "TSCX File" type.

Select "Save" to save it.

Step 2 – Upload the file to the online TSCA

From the email you receive, select the link "Continue my TSC application" or click this link:

https://wwwapps2.tc.gc.ca/Saf-Sec-Sur/12/TSCM-TSCA/tsca/app?lang=en

Under "Would you like to continue an application that you already started in a .tscx file format?" select "Yes."

Select "Choose File" to browse for your .tscx file.

TSCA DocuSign steps for marine port applicants

Select your file from the location where you saved it.
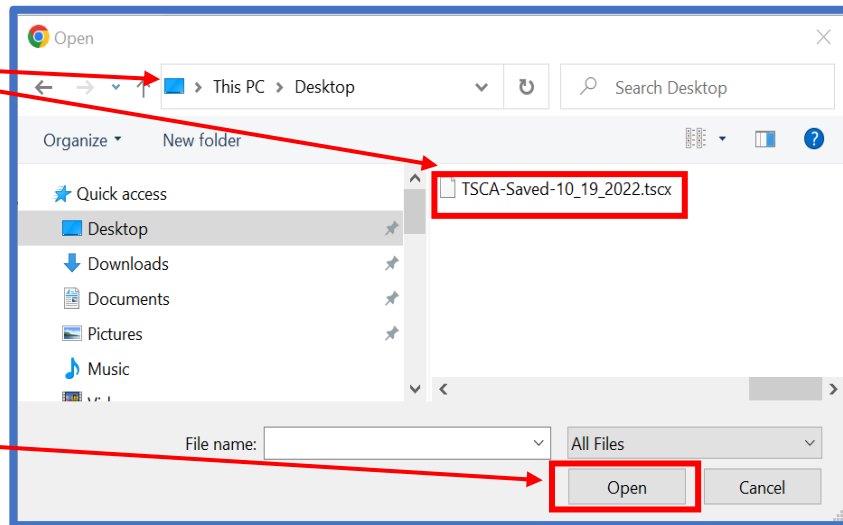
Once you have selected your file, select "Open."

Once you have attached your file, the file name will be displayed next to the "Choose File" button.

Select "Restore data."

You will see a green banner confirming you can continue your application.

You will also see green checkmarks next to "Application Details" and "Requesting Authority" indicating these sections of the application are completed.

February 2023

TSCA DocuSign steps for marine port applicants

Step 3 – Review the saved information

Review the information in the "Application Details" section and the "Requesting Authority" section and select "Next."

Step 4 – Enter your information

Enter your information into each section as directed and required.

3b. Sharing an application for review

We recommend you share your application with your enrolment site before you submit it, so they can review it for accuracy. By having them review your application, you're less likely to submit your application with a mistake or incomplete information and are more likely to receive your security clearance sooner.

Step 1 – Email yourself a back-up copy of your application.

Before sending it for review, we recommend you save a copy of your application to your local device as a back-up copy.

Once you have completed the application, on the "Application Summary/Submission" page, select "Save progress."

The "Save current application" pop-up will appear.

Read the notice, then check the box stating you agree.

The email address you entered into the "Contact Details" section of the TSCA will auto-populate here. If you would like, you can change it, then select "Send."

TSCA DocuSign steps for marine port applicants

Step 2 – Share the application for review

Once you have saved or sent yourself a copy, select "Share for review" at the bottom of the "Application Summary/Submission" page.

Enter the email address of the individual you want to review your application, then select "Send."

A green banner will appear at the top of the screen indicating that your email has been sent. You can close this page.

The individual will review your application and make or mark changes for you to make, as necessary.

They will send the application back to you as a .tscx file for you to upload and submit.

TSCA DocuSign steps for marine port applicants

Follow the guidance in section 3a. "Starting from a saved application" to load your saved file, make the appropriate changes, if necessary, and submit it.

4. Email – Transportation Security Clearance (TSC) application confirmation

Once you submit your TSCA, you will receive a confirmation email.

Start preparing your documents now!

- Scan or take a good quality picture of each document.
- Include images of front and back side of each card, certificate and document. If you don't include every document, front and back, your application will be **Declined!**
- Save your documents in one folder, on your phone or electronic device.

List of documents to scan or photograph:

- **Passport**
- **Canadian birth certificate**
- **Police certificate: France, from 2020-01 to 2020-08**

To see examples of documents that may be provided as proof of time spent out-of-country, read the:
Guideline for transportation security clearance (TSC) applications with extended out-of-country (OOC) implications. .

This email tells you which documents you need to prepare based on the information you entered into your application.

START PREPARING THESE DOCUMENTS NOW! You will need to upload these documents to DocuSign via the DocuSign email. Some documents may take time to collect which could delay your application.

This email also provides guidance to print your application; however, your application is sent digitally to all required signing parties via DocuSign, so you are not required to print it.

There is also a link along with your personal TSC number so you can check the status of your application.

5. Preparing your supporting documentation

It's very important that you take, clear, legible, high-quality photos or scans of your supporting documentation to attach to your application via DocuSign.

If you don't upload all the documents that you are required to provide, or your supporting documentation is blurry, missing information or signatures, or illegible, your application will be declined, which will delay the process of obtaining your TSC.

Step 1 – Gather your documents

The email you receive once you submit your application, as well as the list on your application when you are uploading your documents, will tell you exactly which documents you will need to include based on the information you entered.

If you spent six months or more out of the country, go to the Guidelines for transportation security clearance (TSC) applications with extended out-of-country (OOC) implications to learn which documents you need to include with your application. Depending on your time spent out of the country, you may be required to gather police records from several countries, and this can take time – so start right away!

TSCA DocuSign steps for marine port applicants

Step 2 – Document parameters

Make sure your document uploads are **clear, in colour, and signed where required**.

Once you upload your documents to DocuSign, it automatically creates a PDF of your uploads. DocuSign accepts these format types:

DOCUMENT	.doc, .docm, .docx, .dot, .dotm, .dotx, .htm, .html, .msg, .pdf, .pot, .potx, .pps, .ppt, .pptm, .pptx, .rtf, .txt, .wpd, .xhtml, .xps
IMAGE	.bmp, .gif, .jpg, .jpeg, .png, .tif, .tiff

We recommend uploading files around 5MB, to maintain DocuSign's performance. However, DocuSign accepts files up to 25MB.

Step 3 – How to capture your documentation

You can use a mobile device to simply take photos of your documentation and upload them directly to your application.

You can also use a mobile app to take photos of documentation that the app then converts to scans. To do this, you can use one of the following scanning apps:

- The Notes app on an Apple device
- The Google Drive app on an Android device
- Adobe Scan (downloadable from the Apple App Store and Google Play)
- Microsoft Lens (downloadable from the Apple App Store and Google Play)

If you can't use your mobile device, you can use a high-quality scanner.

Save your uploads to a folder where you can retrieve them later.

Step 4 – What to capture

Some documents need scans of both the front and back.

Reminder: Make sure your document uploads are **clear, in colour, and signed where required.**

TSCA DocuSign steps for marine port applicants

Here is what is required of each document type:

1. Passport
   a. Signature page – ensure your signature and photo can be clearly read, as well as the endorsements and limitations at the top of the page, and the barcode on the right-hand side of the page. Make sure you sign this page if you are over 16 years of age!
   b. Photo page – ensure your photo and your personal information can be clearly read, including the barcode at the bottom.
2. Canadian birth certificate
   a. Front of certificate
   b. Back of certificate
3. Canadian citizenship certificate or card
   a. Front of certificate
   b. Back of certificate
4. Naturalization certificate
   a. Front of certificate
   b. Back of certificate
5. Certificate of registration of birth abroad
   a. Front of certificate
   b. Back of certificate
6. Certificate of retention
   a. Front of certificate
   b. Back of certificate
7. Permanent residence card
   a. Front of card
   b. Back of card
8. Work permit
   a. Front of permit
9. Study permit
   a. Front of permit
10. Visitor record
    a. Front of document
11. Out-of-country documents
    a. Front of documents
    b. Back of documents

TSCA DocuSign steps for marine port applicants

12. Confirmation of permanent residence
    a. Front of document

13. Record of landing document
    a. Front of document – this sample document has information redacted from it; however, please ensure your document has all information visible and clear.

TSCA DocuSign steps for marine port applicants

6. Email – You have a task in DocuSign

You will receive an email from "TSCA via DocuSign" with a link to review and sign your application, and upload your supporting documents.

- For security purposes, ensure the email address listed is TSCModernization-ModernisationHST@tc.gc.ca.
- This email tells you what to expect once you have uploaded your documents, including scheduling an appointment with your enrolment site at your local marine port to have your fingerprints taken and your identification verified.
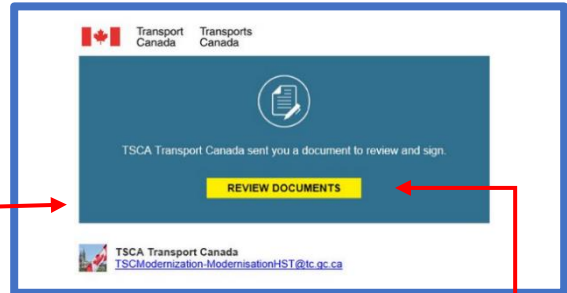
Click on the "Review Documents" link to open your file in DocuSign.

If, once you click on "Review Documents," you're not able to upload your documents and sign your application right away, you can select "Finish Later" in DocuSign to save your progress. Keep this email so you have the DocuSign link, as there is no other way to access your application.

7. Signing and uploading documentation in DocuSign

Once you select "Review Documents" you will be guided to DocuSign where you can review your application, sign and initial where required, and upload your supporting documentation.

You can use DocuSign in Edge, Firefox, Chrome, Safari, or on a mobile device. You do not need a DocuSign account to sign your application or upload your documents.

Step 1 – Review the disclosure and agree to the terms and conditions

When you open DocuSign, you will be asked to review some additional information and agree to use electronic records and signatures.

Select "View More" to see the reminders and next steps from Transport Canada.

Please review the "Electronic Record and Signature Disclosure."

Once you have read it, select the checkbox indicating that you agree to use electronic records and signatures, and select "Continue" to keep reviewing your application.

TSCA DocuSign steps for marine port applicants

Step 2 – Other actions

If you need to save your progress and come back to it, at any time select "Other Actions" then "Finish Later."

If at any point your DocuSign session times out, simply return to the email from DocuSign to reopen your application and pick up where you left off. DocuSign will save your progress.

Please do not select "Decline to Sign" for any reason.

If something is wrong with your application, it may be amendable – please speak with your enrolment officer during your verification appointment.

If you do select it by accident, please speak with your employer or hiring company to start a new application.
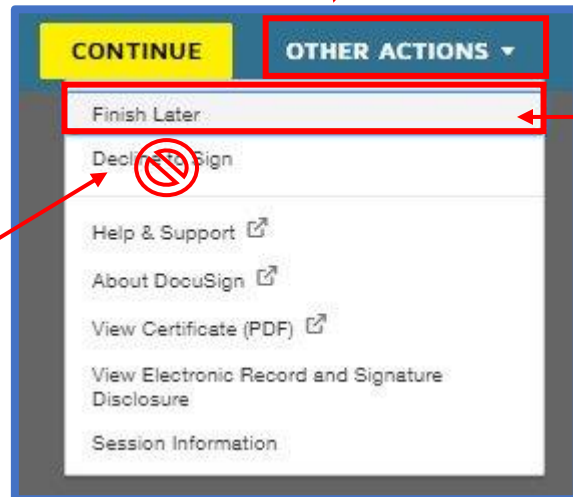
Step 3 – Start signing

Once you select "Continue," DocuSign will start flagging where you need to sign. The first flag will read "Start." Select the "Start" flag to review your application for accuracy and proceed to the first signing spot.

Step 4 – Attaching supporting documentation

This section requires you to upload your supporting documentation. Based on the information you provided in your application, there will be a list of all the identification you are required to upload copies of.

Click the paperclip icon next to the yellow "Attach" flag to upload your required supporting documentation. Until you upload your documents, the note next to the paperclip will read, "Required – Attachment."
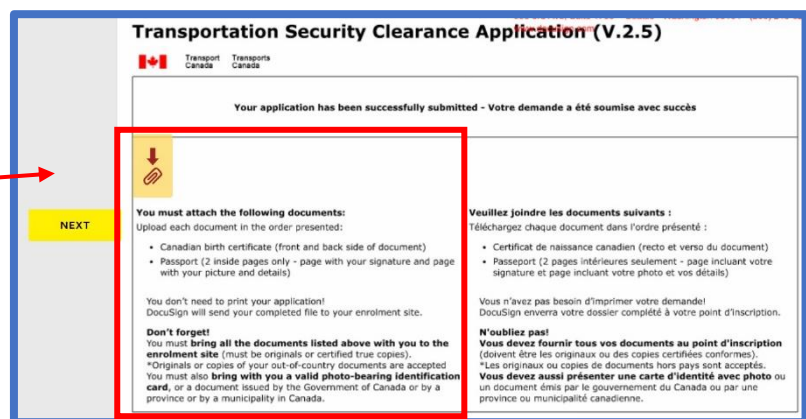
TSCA DocuSign steps for marine port applicants

The "Upload Attachment" pop-up will appear. Select "Upload a file" to attach your documents.

Search for your documents in the folder to which you saved them when you took pictures or scans.
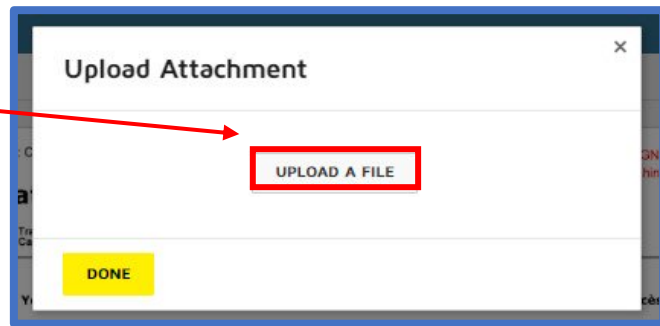
You can only select one file at a time; however, you can upload multiple files at once.

Click "Done" once you have added all your documents.
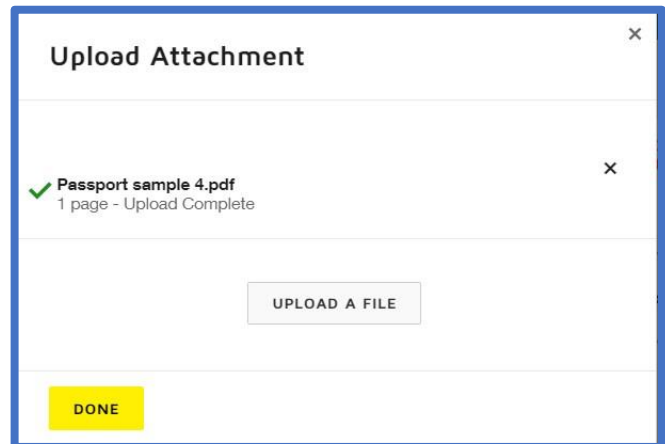
Once you have added a file, the paperclip will change to silver and the note will read, "Required – Attachment Applied."
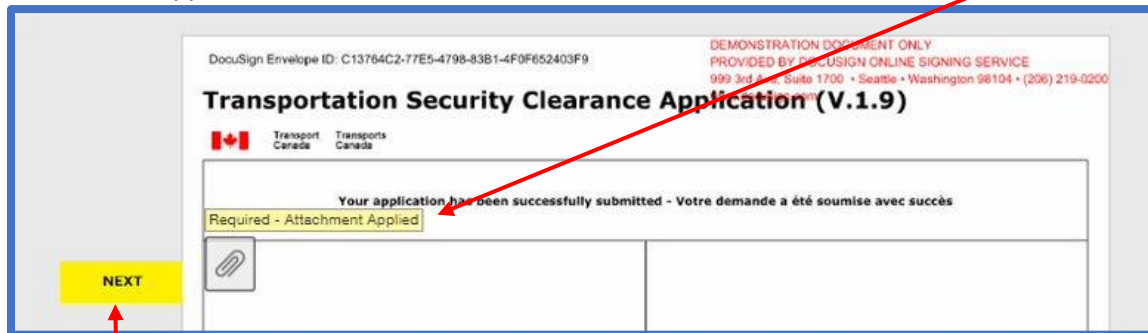
Select "Next" to continue to the next signing area.

Please note: DocuSign cannot validate that you have uploaded all the documents required based on your application inputs. It only recognizes that an attachment has been uploaded. It is your responsibility to ensure that all of your supporting documents are attached, upright, in colour, and can be clearly read. If you are missing documentation or it cannot be read, your application will be declined and you will have to start the application process over, which will delay your job start.

TSCA DocuSign steps for marine port applicants

Step 5 – Signing your application – PART C - APPLICANT

Next, DocuSign will guide you to review "PART C – APPLICANT" of your application.

Review all your information carefully to ensure it is correct. If you notice any errors, please speak with your enrolment officer during your verification appointment.

a. If you find an error that can be corrected by comparing it to a piece of supporting documentation, your enrolment officer may be able to correct it.
b. If you find an error that cannot be corrected by comparing it to a piece of supporting documentation, you may need to submit a new TSC application.

Add your initials next to sections 32, 34a., and 34d. to confirm the information you entered is correct.

Select the yellow "Next" flag to be guided to the next section.

TSCA DocuSign steps for marine port applicants

Step 6 – Creating a signature

The first time you click to sign, the "Adopt Your Signature" pop-up box will display.

Here you can enter your full name and initials.

DocuSign will create an approved digital signature and initials and show you a preview.

You also have the option to:

- Draw your own signature (must match supporting documentation)
- Upload an existing signature (must match supporting documentation)
- Change the style of your digital signature

When you are happy with your signature, select "Adopt and Sign."

Step 7 – Signing your application – PART E – CONSENT AND CONFIRMATION

Read the consent statement carefully and add your initials and signature to "PART E – CONSENT AND CONFIRMATION."
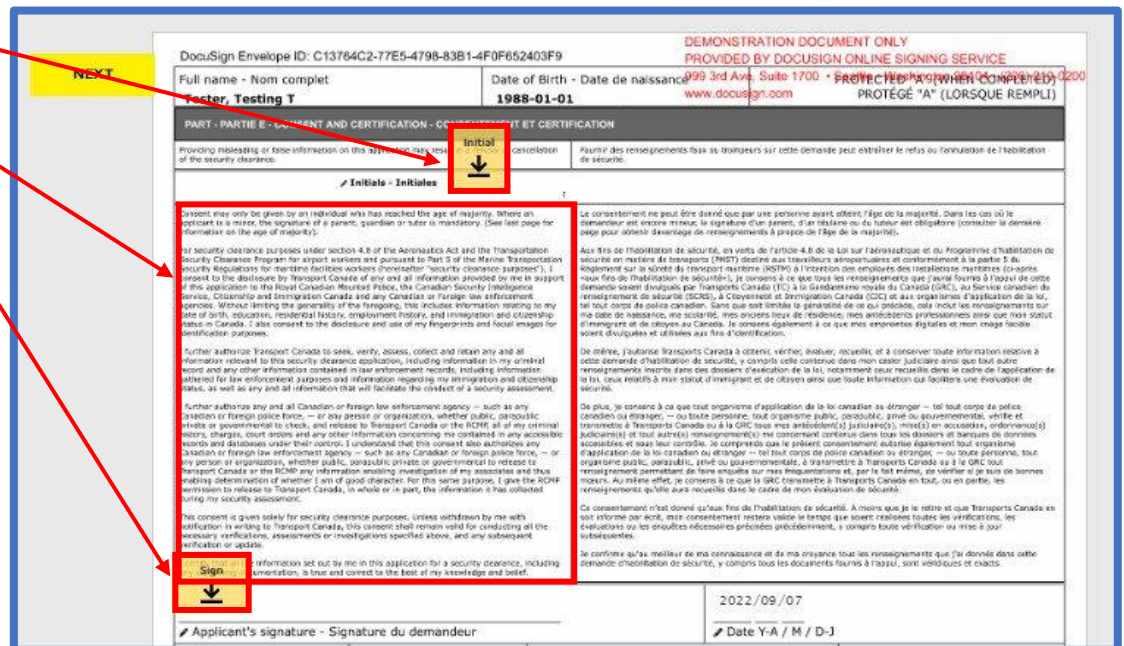
TSCA DocuSign steps for marine port applicants

Step 8 – Reviewing your application and supporting documentation

Review the Privacy Act Statement.

Check your attachments to ensure they are legible, right-side up, and clear.

Step 9 – Deleting and reuploading supporting documentation, if required

If you need to reupload your documents, return to the attachment page, and click the paper clip to open your current attachments.

TSCA DocuSign steps for marine port applicants

Select the "X" next to attachment you would like to delete, then reupload your documents.
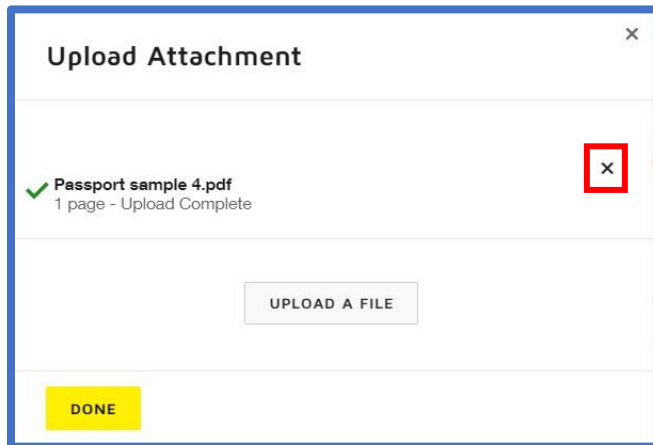
Step 10 – Finishing your application

Once you have confirmed that your application and attachments are correct, select "Finish" from the top toolbar.

A pop-up will confirm that you're done signing and will give you the option to download or print your documents if you would like to.

You do not have to print or save your application at this point, since DocuSign will send you a complete package after the enrolment site signs your application.

Select the yellow "Continue" button once you are done.

DocuSign will confirm that you've finished signing, and you can close your browser.

8. Next steps after DocuSign submission

DocuSign will send your application and attachments securely to your marine port's enrolment site, at which point you will need to book a verification appointment to have your application reviewed and

TSCA DocuSign steps for marine port applicants

your fingerprints taken. Please follow your enrolment site's local processes for booking this appointment. Your signing authority or enrolment site can support you with this.

Note: If you are under the age of majority in your province, after you submit your completed envelope, and prior to your enrolment site receiving it, DocuSign will send an email to the parent, guardian, or tutor you listed in your TSCA for them to sign your application as well.

Step 1 – If an enrolment officer declines your application

An enrolment officer may review your application prior to your appointment and decline it if you are missing required supporting documentation, your supporting documentation does not match the information entered into the application, or is missing a signature or required component, the supporting documentation cannot be read, or there is a significant error with your application. Supporting documentation cannot be reattached or corrected once you have submitted your application, nor do you have the option to edit your application, so it's important to ensure everything is correct and legible upon submission.

If the enrolment officer declines your application, you will receive an email advising you the application has been declined.

If this happens, discuss the situation with the marine enrolment site who can advise you what areas of your application may need to be corrected. When an application has been declined in DocuSign, it cannot be reactivated, so you will need to complete a new Transportation Security Clearance Application, and you will need to sign and reupload documentation as required.

Step 2 – Attending your verification appointment

You must bring your original or certified copies of your required supporting documentation to your verification appointment so it can be verified against your application for accuracy. Non-certified scans or photocopies are not accepted.

You must also bring government-issued photo identification to your verification appointment, such as a driver's license.

You do not need to bring a printed copy of your application. Your enrolment site will have access to it digitally.

During your appointment, the enrolment officer will take your fingerprints, then sign their portion of your application, and submit it to Transport Canada's Security Screening Programs (TC SSP). TC SSP will conduct appropriate background checks and verify your information. Once TC SSP has approved your application for security clearance, your enrolment site will contact you to book another appointment to pick up your security pass.

If the enrolment officer determines during your verification appointment that your application is incorrect or incomplete, or your attached supporting documentation is incorrect, incomplete, or illegible, they will decline your application at this time. They can make minor changes or corrections without having to decline it, such as typos, or other mistakes that can be confirmed by your attached

TSCA DocuSign steps for marine port applicants

supporting documentation; however, they are not able to add or change the supporting documentation that you attached.

If you don't add the documents you need to, or the scans or photos can't be read, you will have to complete a new application and reupload your supporting documentation.

9. Frequently asked questions

9a. Personal information

Q: How is my personal information being protected?

A: Your privacy and personal information is always protected by the Canadian Privacy Act. DocuSign allows us to better protect your personal information by sending secure, digital files between signatories. We can configure DocuSign to only show certain information to those who require it to complete their tasks.

Q: Who can see my personal information?

A: An enrolment site and Transport Canada can see all your information and supporting documentation.

Q: Does DocuSign store my personal information?

A: DocuSign stores your personal information only through your application and envelope. It is not saved anywhere else in DocuSign. Once your completed application is sent to Transport Canada for review, it is deleted from DocuSign.

9b. Application process

Q: What would cause an enrolment site to decline my application?

A: An enrolment site will decline your application if you are missing supporting documents, important information is missing from your documents or your application, or if your supporting documentation is not clearly legible. This may be done before or during the verification appointment.

Q: Will my application expire if I don't sign it?

A: Yes; DocuSign will expire your envelope 120 days after it's been created if there is no activity. It's important to complete your signing tasks and upload your supporting documentation as soon as possible to ensure there are no delays with your job start.

Q: Will I receive a reminder from DocuSign if I don't sign my envelope?

A: Yes, DocuSign will send you a reminder after 30 days of inactivity.

Q: Can I download and save my application? Can I print my application?

A: Yes, you can download and print your application throughout the process and when you have finished signing it. Remember, since your application is being sent securely via DocuSign to all required parties, there is no need to save or print it.

TSCA DocuSign steps for marine port applicants

Q: What should I do if I see a mistake on my application?

A: If you notice a mistake on your application, please let your enrolment officer know of the mistake when you go in for your verification appointment. If it's a typo or another mistake that can be confirmed by supporting documentation, the enrolment officer can make a note of the correction in your DocuSign envelope. Your enrolment officer will let you know if you need to submit a new application or not.

9c. Supporting documentation

Q: What supporting documentation do I need to attach to my application?

A: The supporting documentation you need to attach to your application varies depending on the information you entered. You will see a list of required supporting documentation in the emails from DocuSign. There is also a checklist in your DocuSign envelope application advising you which documents to upload.

Read this list carefully. Remember some documentation such as out-of-country documentation can take a few weeks to obtain, so review the list as soon as you submit your application and start collecting your documentation right away. It is your responsibility to ensure you have attached the correct required documentation.

Note: If you are missing supporting documentation, your application will be declined which will delay your job start.

Q: Does DocuSign know that I have attached exactly the documents required?

A: No, DocuSign cannot confirm that your supporting documentation is correct. DocuSign only knows that it requires an attachment, and that an attachment has been added, whether that be a picture of your passport or a picture of your dog; it cannot verify or confirm that you have attached the correct documents, or that your documents are clear and legible.

It is your responsibility to ensure the attachments are correct, match the documents you are required to upload, and that the pictures or scans can be clearly read.

Remember, if your uploads are blurry, incomplete, or illegible, your application will be declined which will delay your job start.

9d. DocuSign

Q: Will DocuSign tell me where I need to sign?

A: Yes, DocuSign will guide you with yellow flags to show you where you sign, initial, or upload a document. It won't allow you to submit your envelope until all the required fields are completed.

Q: Will DocuSign let me submit my application with signatures or initials missing?

A: No, you will not be able to submit your application with missing signatures or initials.

Q: What should I do if I don't receive a confirmation email once I submit my application?

TSCA DocuSign steps for marine port applicants

A: Check your junk mail or spam, or "other" inbox. Upload your most recently saved version, double check your email address and resubmit it. Reach out to the authorized signatory to confirm if they received a DocuSign email. Inform them that you will submit a new application with your updated email.

Q: Can I sign my application manually or does it have to go through DocuSign?

A: No, you cannot sign your application manually. If DocuSign or the TSCA are down or unavailable, Transport Canada will have back-up processes in place to support you.