



User Manual

Funeral Investigation, Licencing and Inspection System (FILIS)

Second Edition

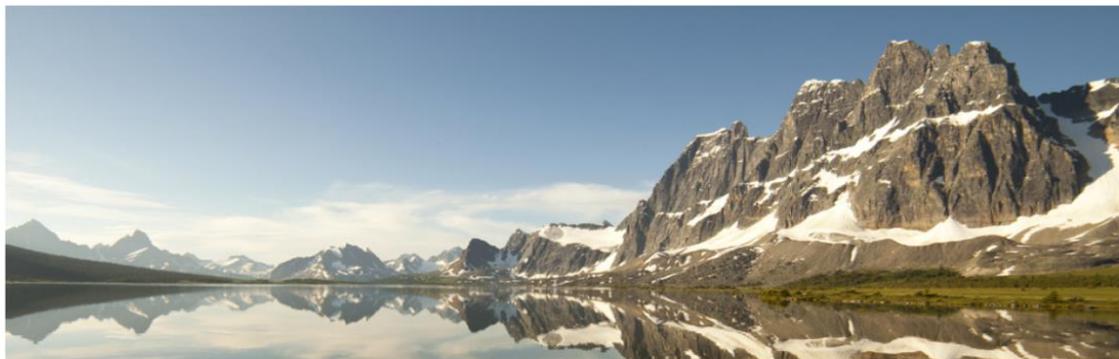


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Introduction

The AFSRB has been working to implement a computer system that will allow for the processing and tracking of licenses, inspections and investigations. This system is called the Funeral Investigation, Licensing and Inspection Program, “FILIS” for short. The most relevant part of the system for the Alberta funeral services businesses and the portion that you will have access to is the licensing portion of this program.

FILIS will allow for all funeral services businesses in the province to complete licensing transactions, report change in sponsorship of individual licensees and track continuing education online. This user manual is directed towards the Business Managers, as under the legislation, business managers are responsible for the licensing documentation.

As additional functionality of FILIS is developed, the new features will be added to the User Manual. At any time, if there are questions regarding the system or how its functionality, and the user manual is not helping, feel free to contact the AFSRB office for help.

Access to the System

Every business manager will be given a user name and will be required to “recover” their password from the system. The business manager’s login will give them access to the licence information for the licensees listed under their branch.

FILIS can be accessed through the AFSRB website. At the top of home page, beside the search button, there will be a link to “Member login”. Click on this link, and a place to enter your username and password can be input.

Once the business manager has logged into the system, they will have access to renew the licences for the funeral services business, ability to update the status of individuals, and other licence functionality.

Logging on to system

- The preferred browsers for optimal performance from the system are Google Chrome and Firefox.
- Go to the AFSRB website (www.afsrb.ab.ca)
- Click on the link at the top of the home page called “Members login”
- The business manager must log onto the “Business Portal” using their assigned business manager user name provided by the AFSRB.
 - The password will not be provided by the AFSRB, so the password will have to be requested the first time you enter your user name.
 - Under the login button, it shows “Forgot your password [CLICK HERE](#) to restore it”, click on this link and an email will be sent to your email with the password to access the system.
 - If the business manager has not received their user name or does not remember it, call the AFSRB office to obtain this information.

The screenshot shows the AFSRB website's login interface. At the top left is the AFSRB logo (alberta funeral services regulatory board). To the right is a search bar. Below the search bar is a navigation menu with links: ABOUT AFSRB, CONSUMER, INDUSTRY, NEWS & TRENDS, and CONTACT. The main content area features a login form with a 'USER NAME' field, a 'PASSWORD' field, and a blue 'LOGIN' button. Below the login button is a link: 'FORGOT YOUR PASSWORD? CLICK HERE TO RESTORE IT'. At the bottom of the form is a checkbox labeled 'REMEMBER ME FOR 1 MONTH'. A blue arrow points from the 'CLICK HERE' link to the right edge of the page.

- The business portal will be displayed and you will have access to the system.
- If you are a business manager for more than one location, you will be given a different user name for each branch that you are the business manager for.

Checking the current licensees

- A business manager is able to check who is currently licensed under their funeral services branch at any time.
- From the Business Portal home page, the first area to review will be under the section “Current Licensees”

The screenshot shows the AFSRB Business Portal interface. At the top left is the AFSRB logo (Alberta Funeral Services Regulatory Board). To the right is a 'Memberhome' button and a search bar. Below this is a navigation menu with links: ABOUT AFSRB, CONSUMER, INDUSTRY, NEWS & TRENDS, CONTACT, and LOGOUT. The main content area is titled 'Business Portal' and features a 'PROFILE' section for 'James Bond', Business, with contact information for Bond Funeral Home. To the right, a 'WELCOME TO AFSRB'S ONLINE BRANCH/BUSINESS PORTAL' message is displayed. Below the welcome message is a section titled '1. CURRENT LICENSEES' with a button that says 'To Check Employees from your Branch or to change their Licence Status, click [HERE](#)'. A blue arrow points from the 'Current Licensees' section in the text above to this button.

- Click on the link and a list of all the current licensees captured under the branch will be displayed.

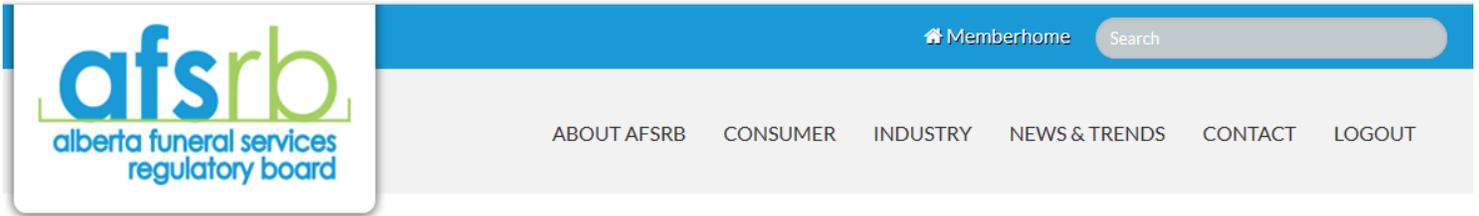
Employees

This list contains all current professional staff licensed under this branch and all students registered. If any of the below listed employees are no longer working at this business location, please update their status below. Although students are listed here, their student registrations do not require renewal.

Lisbon Night EMPLOYEE/STUDENT	Identification No. 11640	Current Status : Active	<input type="button" value="Update Employee Status"/>
James Bond EMPLOYEE	Funeral Director Licence Identification No. 11639	Current Status : Active	<input type="button" value="Update Employee Status"/>

- Review this list carefully as these will be the licences that the system will renew.
 - Students will also be listed on this page, but there will be no renewal for them.
 - The system does not allow the business manager to choose which employees are renewed. All licensees listed on this page will be renewed.
- If the list of licensees is complete and accurate, go to step 3.
- If there is anyone on this list that is no longer employed or will be no longer employed (future date), click on the link “Update employee status”.

- When you click on “Update employee status”, the following screen will appear.



EMPLOYEE STATUS CHANGES -

Branch Bond Funeral Home

Below please search for the name of the employee in your branch.

Employee Name * x v
Bond Funeral Home Lisbon Night

Employee Status

- No Longer Employed
- Do not renew (will not be returning after March 31st.)
- Do not renew (on extended leave, licence will be inactive after March 31)

Effective Date of Status Change * v

Save
Cancel

- Choose the option that is appropriate for the status change.
- The effective date of status change can be a past or future date based on when the licensee or student was or will be no longer be working for the funeral business.

- If there are licensees that do not appear on this list that have licences to be renewed, go to the section in this manual that explains how to add new licensees to your branch.

Licence Renewal Declarations

- All licensees must complete and sign a licence declaration before their licence can be renewed.
- Under the section titled “4. Licence Renewals”, option b is the location of where these declarations can be found.

Business
Corporate Name: Bond Funeral Home
Branch: Bond Funeral Home
Your Phone: (204) 888-8888
Your Email: icamara@olatechcorp.com

1. CURRENT LICENSEES
To Check Employees from your Branch or to change their Licence Status, click [HERE](#)

2. ADD NEW LICENSEES
a. To apply for first time licence, click [HERE](#)
b. To apply for a first time licence for a registered student, click [HERE](#)
c. To apply for licence (transfer of a current AFSRB licence holder to this branch), click [HERE](#)

3. APPLY FOR STUDENT ELIGIBILITY
a. To apply for Student Eligibility, click [HERE](#)

4. LICENCE RENEWALS
Please complete each step listed below to ensure the renewals are filed accurately.
Licence Renewals will be as follows:
a. Review Current Licensees (section 1 above). this is to confirm that the appropriate licensees are being renewed under your branch.
b. Print Licensee renewal declarations, click [HERE](#)
c. Renew Now

OUTSTANDING INVOICE(S)
Invoice # 189 - \$25.00 (Unpaid)
Invoice # 188 - \$25.00 (Unpaid)
Invoice # 187 - \$25.00 (Unpaid)
Invoice # 185 - \$50.00 (Unpaid)
Invoice # 184 - \$87.50 (Unpaid)
Invoice # 183 - \$100.00 (Unpaid)
Invoice # 180 - \$600.00 (Unpaid)
Invoice # 179 - \$725.00 (Unpaid)
Invoice # 178 - \$725.00 (Unpaid)
Invoice # 7 - \$900.00 (Unpaid)

SETTINGS
View/Edit Branch Contact Information
Upload Documents
View Business Invoices
Change Branch Username/Password

- One declaration must be printed for each licensee whose licence is being renewed.
- Click on View Declaration to see the declaration for that licensee.

afsrb
alberta funeral services regulatory board

Memberhome Search

ABOUT AFSRB CONSUMER INDUSTRY NEWS & TRENDS CONTACT LOGOUT

James Bond
Funeral Director Licence
[View Declaration](#)

John Wayne
Pre-need Sales Licence
[View Declaration](#)

- If there are no licensees showing this page is opened, it is possible to print blank renewal declarations under the Settings tab. This is found on the bottom left-hand side of the home page of the business portal. These will not be pre-populated, but the licensees can simply write their name into the space provided.

- The declarations are pre-populated with the licensee's name and licence type.

- This form can be printed from this page using the “Print” button at the top of the page.
- The individual listed on the declaration must be the one to answer the questions and sign the declaration. All questions must have a yes or no answer beside them.
- If you have more declarations to print, use the “Back” button to return to the previous page, so that you can continue printing.

Uploading Documents to the system

- Once the declarations are signed, these can be scanned and uploaded into the system. Upload the documents under the “Settings” heading on the Business Portal page (home page).

- When you click on “Upload Documents”, the above screen appears. For licence renewal declarations, choose the option “Renewal” and click “Next”.

- Choose the location where the scanned document was saved. Use the Browse button to locate the documents on your system.
 - If it is easier for you, all the declaration documents can be scanned together so that you will only have one upload to complete.
- Comments can be added if needed, but comments are not necessary.
- If you are only submitting one document, click “Yes”, as this will trigger an email to the AFSRB to let us know that documents have been sent.
- If you are submitting more than one document, click “No” and you can continue to upload documents without sending the AFSRB an email for each one. When you have completed all of the uploads, click “Yes”, so that the email will be sent to the AFSRB.
- Click the “save” button to save the uploaded document to the system.
 - You will not be able to see the documents that you have loaded
 - When you click save, it will take you back to the home page and you will need to go back into “upload documents” if you have additional documents to upload.

- The declaration documents can also be faxed to the AFSRB office (780-452-6085), or these can be mailed to the AFSRB office (180, 2755 Broadmoor Blvd, Sherwood Park, AB T8H 2W7).
- Declarations are required for renewals to be processed.

Licence Renewals

- The Business Manager is responsible for the renewals and ensuring that these are done accurately. Because the Business Manager is completing the renewals, there is no requirement for them to sign a paper application indicating they are sponsoring a licensee, this assumption is made based on the renewal being completed for any individual.
- The on-line renewal process follows the same format with the same requirements as the paper application.
- Under the section titled “Licence Renewal”, option c is the location which provides access to renew the business, crematory and individual licences. ←

The screenshot displays the AFSRB Business Portal interface. At the top, there is a navigation bar with the AFSRB logo on the left and a search bar on the right. Below the navigation bar, there are several menu items: ABOUT AFSRB, CONSUMER, INDUSTRY, NEWS & TRENDS, CONTACT, and LOGOUT. The main content area is titled "Business Portal" and is divided into several sections. On the left, there is a "PROFILE" section for James Bond, a Business Manager for Bond Funeral Home, with contact information. Below this is an "OUTSTANDING INVOICE(S)" section listing three unpaid invoices. Further down is a "SETTINGS" section with options like "View/Edit Branch Contact Information", "Upload Documents", "View Business Invoices", "Change Branch Username/Password", and "Logout". The main content area on the right is titled "WELCOME TO AFSRB'S ONLINE BRANCH/BUSINESS PORTAL" and contains a greeting and instructions. Below this are four numbered sections: "1. CURRENT LICENSEES", "2. ADD NEW LICENSEES", "3. APPLY FOR STUDENT ELIGIBILITY", and "4. LICENCE RENEWALS". The "4. LICENCE RENEWALS" section is highlighted with a red border and contains instructions for completing the renewal process, including a list of steps: a. Review Current Licensees, b. Print Licensee renewal declarations, and c. Renew Now. A blue arrow points from the text in the list item above to the "c. Renew Now" link in this section.

- When you click on the link “Renew Now”, the renewal process will be started and the following page will be loaded.

RENEWAL BUSINESS AND EMPLOYEE

BUSINESS MANAGER INFORMATION

Note: The business manager is responsible for the renewal of the licences. The system automatically assumes it is the business manager logged in to do this activity.

Branch Bond Funeral Home
Portal Type Business
First Name James
Middle Name
Last Name Bond

If this is no longer the business manager for this location, please contact the AFSRB office to update this information.

Primary Phone
Cell Phone
Primary Email

LOGIN INFORMATION
Min. 6 characters required for username and password

Username
Password
Password Confirmation
Licence period: 04/01/2020 - 04/01/2021

- If there are any corrections to be made, correct them on this page.
- If all the information on the page is correct, click “Next”.
- This page that loads contains general business information.

RENEWAL BUSINESS AND EMPLOYEE ADDITIONAL INFORMATION

BRANCH INFORMATION

Corporation Legal Name Bond Funeral Home
Branch Name Bond Funeral Home
Business Street Address 199 Anywhere Street #101 129 Anywhere Street #202 Winnipeg, Manitoba, R3K 1M2, Canada

BUSINESS MAILING ADDRESS

Address Line 1
Address Line 2
City
Country
Province/State
Postal/Zip
Business Phone
Business Fax
Business Email
Website

SHAREHOLDER INFORMATION

Note: If your shareholder information has changed, you must fill in the shareholder information form located in your portal.

In your organization, has there been any shareholder changes? Yes No
Fiscal Year End for the Business

- Check the business address and contact information to ensure that it is correct.
- If there has been any change in the shareholders/directors of the corporate entity, click yes, and then you will need to complete the shareholder form that is found under the settings of the Business Portal home page.
- The fiscal year end is also listed on this page. If this is incorrect, you will need to contact the AFSRB office to get this amended.
- If everything is correct, click “Next”

- This page is where you need to enter your “call” numbers. This is the number of funeral services that your branch has provided during your fiscal year.

- Enter the number of calls in the space provided.
- Once you have entered the appropriate number, click “Next”.
- The next page is to confirm what type of business licence you are renewing. The first two options are for businesses that enter pre-need contracts (either funded by trust or insurance), the third option is for businesses who do not enter into any pre-need contracts.

- The option you choose will add the appropriate licensing amount to the renewal total.
 - \$75 if only funeral directors enter into pre-need contracts for the funeral business
 - \$200 if there are licensed pre-need salespeople who enter into pre-need contracts for the funeral business
 - \$0 if no pre-need contracts are written at the funeral business.

- The next screen confirms if you will be licensing a crematory.

- If you have a crematory to licence under the current corporate identity that you are logged in as, click “yes”.

- If you click yes, the following screen will be loaded and it will ask for the crematory name and the crematory manager’s name to be entered.

- If you do not have a crematory to be licensed, the next screen will not include the crematory name and crematory manager boxes.

Fee Summary for Renewal

- This page shows the calculation of all the licensing fees based on the options and information that was provided to the system.

RENEWAL BUSINESS AND EMPLOYEE ADDITIONAL INFORMATION

Please enter Crematory Information below

Crematory Name -

Crematory Manager -

Please select each price and click Next to pay.

Annual Funeral Services Business - Licence Fee: \$150.00

Pre-need Business Licence - Fee (Funeral Directors Only): \$75.00

Crematory - Licence Fee: \$100.00

Per Call - Fees: \$730.00

Funeral Director/Embalmer - Licence Fee(s): \$175.00

Funeral Director - Licence Fee(s): \$100.00

Embalmer - Licence Fee(s): \$100.00

Business Manager - Licence Fees: \$0.00

- Check this screen carefully to ensure that the correct charges have been calculated for this branch.
 - This screen will appear differently for each business as the items chosen during the renewal will be reflected on this page.
- If you are satisfied that the calculation is correct based on the information that was provided, click “Next”.
 - If the calculation does not seem correct, click “cancel” and you can restart your renewal, or click “back” to take you to the previous page.
- An explanation of the charges listed on the screen, appears on the next page.

Please select each price and click Next to pay.

Annual Funeral Services Business	● Licence Fee: \$150.00
Pre-need Business Licence	● Fee (Funeral Directors Only): \$75.00
Crematory	● Licence Fee: \$100.00
Per Call	● Fees: \$960.00
Funeral Director/Embalmer	● Licence Fee(s): \$175.00
Funeral Director	● Licence Fee(s): \$100.00
Embalmer	● Licence Fee(s): \$100.00
Business Manager	● Licence Fees: \$0.00

Back Next Cancel

- This is the basic amount that all funeral services businesses pay for the renewal.
- This is the additional business licence amount for businesses that sell pre-need, so it may be \$200 if you licence pre-need salespersons, or it may be \$75 if your business only uses funeral directors (and no pre-need salespersons).
 - This line will not show up if you do not sell pre-need.
- If you have a crematory to licence and have indicated this during the renewal process, this amount will display.
 - If you do not licence a crematory, this line will not display.
- The “per call” amount calculates \$10 for each call entered during the renewal process.
 - In the example above, there were 96 calls entered, so the system calculates $96 \times \$10 = \960 .
- This section calculates all of the licensees that were listed in the first section that was reviewed prior to starting the renewal process.
 - This section will change depending on the licensees that your business employs, but may include funeral directors, embalmers, dual funeral director/embalmers, and pre-need salespersons.
 - The business manager licence shows as zero as there is no fee for this licence to be issued.

- This is the final page of the renewal process.

PAYING ONLINE BY CREDIT CARD

RENEWAL BUSINESS AND EMPLOYEE SECURE PAYMENT

Secure credit card payment
This is a secure 256-bit SSL encrypted payment



Credit Card Number : *  

Card Validation Code (final group of numbers printed on the back signature panel of the card) : *

Expiration Month / Expiration Year : * 01 / 2021

Card Holder Name : * James Bond

Email : * bond@email.ca

BILLING ADDRESS

Address Line 1 * 123 Anywhere Street

Address Line 2

City * Edmonton

Country * Canada

Province/State * Alberta

Postal/Zip * R3K 1M2

Annual Funeral Services Business - \$150.00
\$150.00 Licence Fee:

Pre-need Business Licence - \$200.00 Fee: \$200.00

Crematory - \$100.00 Licence Fee: \$100.00

Per Call - Fees: \$250.00

Funeral Director - Licence Fee(s): \$200.00

Pre-need Salesperson - Licence Fees: \$0.00

Business Manager - Licence Fees: \$0.00

Total: \$900.00

[\\$ Pay Now](#)

PAYING OFFLINE BY CHEQUE.

[Invoice Me](#)

[Back](#) [Cancel](#)

- Credit card information can be entered on this page to pay the full amount of the invoice. The amount for the renewal cannot be altered from this page.
- This page shows the total amount of the renewal that has just been completed.
- To pay by cheque click “Invoice Me”, and an invoice will be created.
- **NOTE:** Once the invoice is created or credit card payment is made, you will not be able to make any changes to your renewal through the system.
 - If you aren’t sure that the totals are correct, click the back button to leave this page.
 - If the back button is clicked, you will still be able to make changes to your renewal.
- Payment can be made by credit card in the system or by mailing a cheque to the Board office.
 - Please note, renewals are not complete and licences are not active until payment has been received by the AFSRB office.

- To view the invoice, so to the Business Portal Home page as shown below, on the left hand side of the page, you will find the section for outstanding invoices.

Business Portal

PROFILE

James Bond

Business

Corporate Name: Bond Funeral Home
Branch: Bond Funeral Home

Your Phone: (204) 888-8888
Your Email: lcamara@olatechcorp.com

WELCOME TO AFSRB'S ONLINE BRANCH/BUSINESS PORTAL

Greetings from Alberta Funeral Services Regulatory Board!

Click on the various links to navigate to different pages of the portal. You can always return to this page by clicking the " Memberhome " button above.

1. CURRENT LICENSEES

To Check Employees from your Branch or to change their Licence Status, click [HERE](#)

2. ADD NEW LICENSEES

a. To apply for first time licence, click [HERE](#)
b. To apply for a first time licence for a registered student, click [HERE](#)
c. To apply for licence (transfer of a current AFSRB licence holder to this branch), click [HERE](#)

OUTSTANDING INVOICE(S)

Invoice # 194 - \$900.00 (Unpaid)
Invoice # 183 - \$100.00 (Unpaid)
Invoice # 179 - \$725.00 (Unpaid)

- Click on the invoice that you would like to view.
- This is how your invoice will display.

180, 2755 Broadmoor Blvd, Sherwood Park, Alberta, Canada T8H 2W7
Phone: 780-452-6130 | Toll free: 800.563.4652 | Email: office@afsrb.ab.ca
<http://afsrb.ab.ca>



INVOICE

INVOICE NO: 194
DATE: February 11, 2020

BILL TO:

James Bond
123 Anywhere Street
Edmonton, Alberta R3K 1M2
Canada

DESCRIPTION	AMOUNT
Annual Funeral Services Business - \$150.00 Licence Fee	\$150.00
Pre-need Business Licence - \$200.00 Fee	\$200.00
Crematory - \$100.00 Licence Fee	\$100.00
Per Call - Fees	\$250.00
Funeral Director - Licence Fee(s)	\$100.00
Pre-need Salesperson - Licence Fees	\$100.00
Total	\$900.00
Total Paid	\$0.00

Payment Transactions of Invoice #: 194

Payment Method	Payment Type	Transaction #	Total	Date Created	Transaction Receipt
Nothing found to display.					

Print Invoice: PDF HTML

- The invoice can be printed from this page.
- Invoices will remain on your business portal and can be viewed at any time.

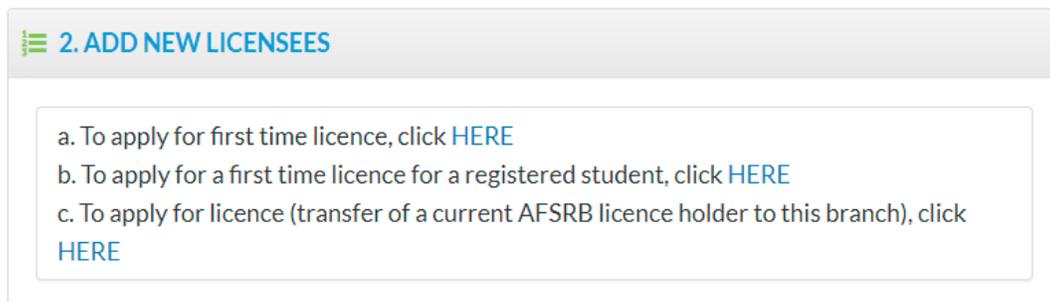
Printing Licences

- Once your renewal is complete, which includes providing renewal declarations for each licensee and payment has been received by the AFSRB, licences will be available for printing from the system.
 - Under the “Settings” tab on the home page, a button for “View Licences” will appear.
 - Click on this link and the licences can be printed from this screen.
- The AFSRB office can also print and mail out your licences to you. Email the AFSRB office to make this request (office@afsrb.ab.ca).

Adding New Licensees

There are different options to choose depending on the individual situation of the licensee who you are adding under the funeral services business.

On the main page of the business portal, the following options section will show up in the options on the right-hand side of the page.



2. ADD NEW LICENSEES

- a. To apply for first time licence, click [HERE](#)
- b. To apply for a first time licence for a registered student, click [HERE](#)
- c. To apply for licence (transfer of a current AFSRB licence holder to this branch), click [HERE](#)

Choose the option that represents the licence you are wishing to obtain, and follow the instructions in the system.