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.

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### 1. The TSCA process

Your company signing authority 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 your company signing authority to review for accuracy before you submit it.

Once you have submitted your completed TSCA, DocuSign will send it via email to your company signing authority to sign.

Once they have signed, you will receive 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 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 airport. The officers will review your application and attached supporting documentation to make sure everything is correct and can be read. They will contact you with instructions on how to book 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 officer will compare it against your application 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 walks you through the process step-by-step. Read and follow it 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.

Company signing authority: A designated individual at your employer, or the company sponsoring your clearance requirement, who is eligible to sign your application on the company's behalf. 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 act as a conduit between the applicant and Transport Canada. Enrolment sites issue and manage applicants' security clearances and passes.

*Enrolment officer:* An enrolment officer works at an enrolment site. They support an applicant by prevetting their application, facilitating verification appointments, 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, and will contact applicants directly with instructions to book.

### 3. Completing your Transportation Security Clearance Application (TSCA)

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

To ensure your hiring company's information is entered correctly, your company signing authority 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 company information. Please wait until you receive the saved application file to start your application.

# 3a. Starting from a saved application

Once your company signing authority has filled in the first two sections of your TSCA, you will receive an email from <a href="mailto:no-reply-ne-pas-respondre.TSC-HST@tc.gc.ca">no-reply-ne-pas-respondre.TSC-HST@tc.gc.ca</a> 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.

Preview

Open

1. S

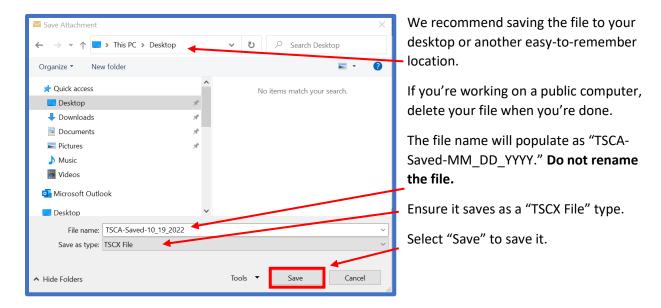
Quick Print

2. C

Save As

3. A
4. C

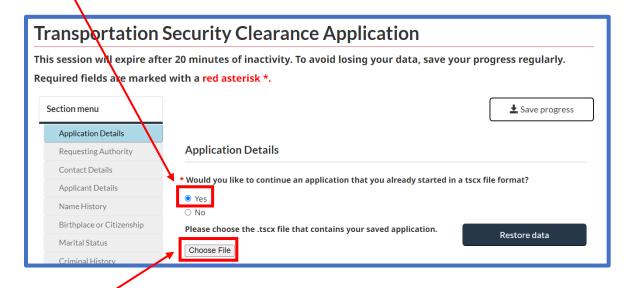
Save All Attachments...



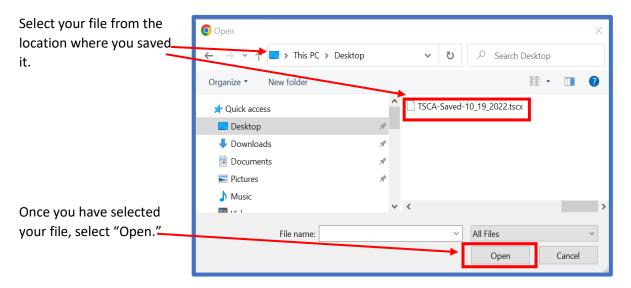
Step 2 – Upload the file to the online TSCA

From the email you receive, select the link "Continue my TSC application" or click this link: <a href="https://www.apps2.tc.gc.ca/Saf-Sec-Sur/12/TSCM-TSCA/tsca/app?lang=en">https://www.apps2.tc.gc.ca/Saf-Sec-Sur/12/TSCM-TSCA/tsca/app?lang=en</a>

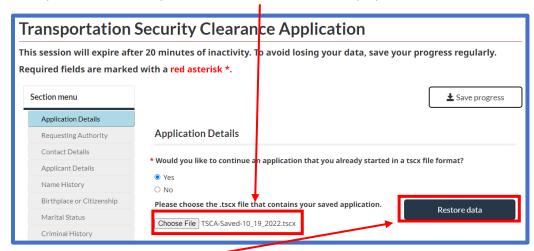
Under "Would you like to continue an application that you already started in a .tscx file format?" select "Yes."



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

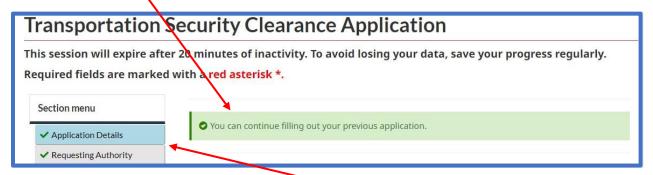


Once you have attached your file, the file name will be displayed next to the "Choose File" button.



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.

### 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 hiring manager or company signing authority 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.

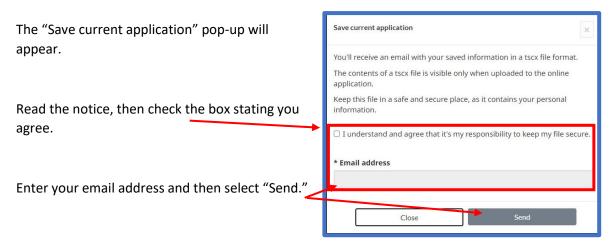
NOTE: If you would rather not share your personal information with your employer, you do not have to share your application with them for review.

### 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.

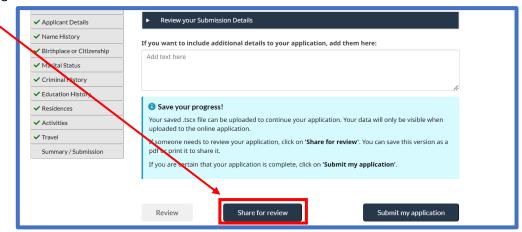
Once you have completed the application, on the "Application Summary/Submission" page, select "Save progress."



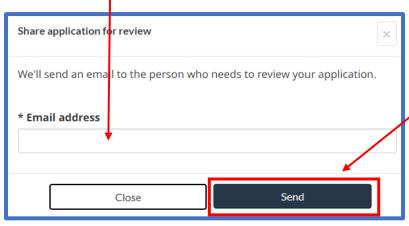


Step 2 – Share the application for review

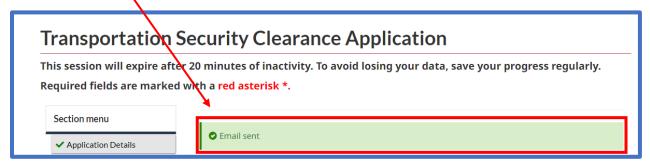
Once you have saved or sent yourself a copy, select "Share for review" at the bottom of the "Application Summary/Submission" page.



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.

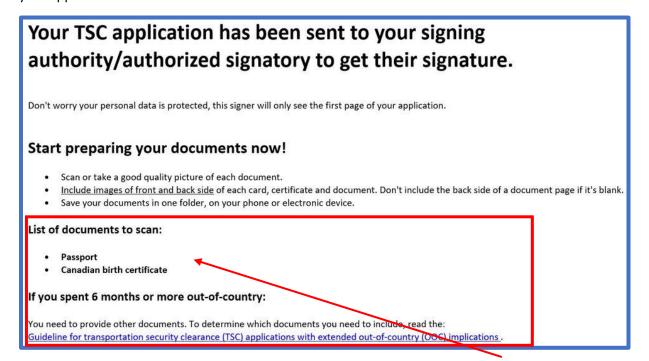
They will send the application back to you as a .tscx file for you to upload and submit.

Follow the guidance in the 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 letting you know your application has been sent, via DocuSign, to your company signing authority.

To protect your personal data, your company signing authority will only see the first page of your application, which includes your given names, surnames, date of birth, occupation, and the reason for your application.



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

**START PREPARING THESE DOCUMENTS NOW!** Once your company signing authority signs your application, you will need to upload these documents. 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 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 tells 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!

#### Step 2 – Document parameters

Make sure your document uploads are **right-side up and in colour**.

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

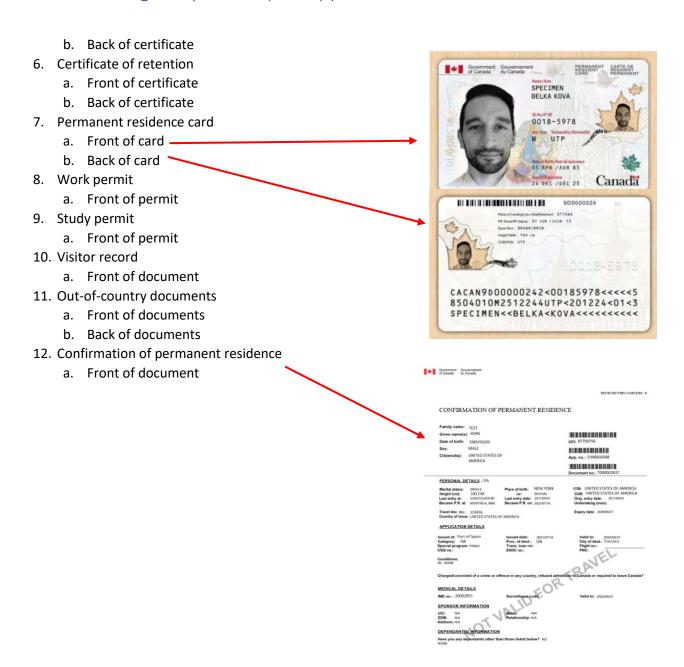
Some documents need scans of both the front and back.

Reminder: Make sure your document uploads are right-side up and in colour.

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.
  - 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

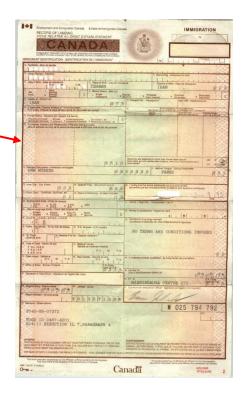




Canada

### 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.



### 6. Email – You have a task in DocuSign

Once your company signing authority signs your application, you will receive an email from "TSCA DHSMT 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 <u>TSCModernization-</u> <u>ModernisationHST@tc.gc.ca.</u>



• This email tells you what to expect once you have uploaded your documents, including scheduling an appointment with your enrolment site at your local airport 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.



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.



### Step 2 - Other actions

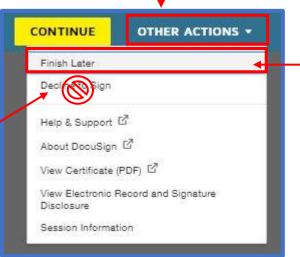
If you need to save your progress and come back to it, at any time select "Other Actions" then "Finish-Later."

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 company signing authority to start a new application.



I agree to use electronic records and signatures.

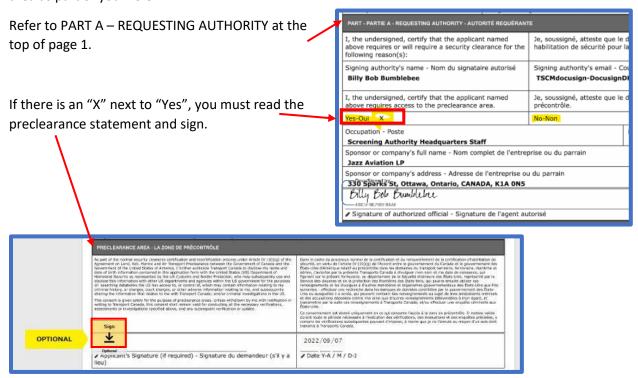
#### Step 3 – Start signing

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



Step 4 – Signing for preclearance screening

The first signature is for "PRECLEARANCE AREA" at the bottom of page 1. This signature is OPTIONAL depending on if your company signing authority indicated that you require access to U.S. preclearance area as part of your role.



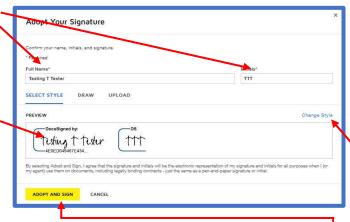
If there is an "X" next to "No," please do not sign this section.

### Step 5 – 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.



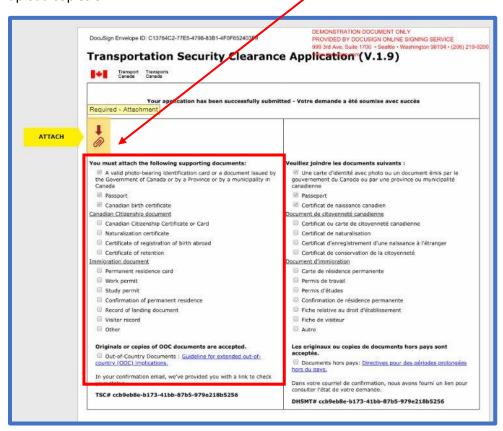
When you are happy with your signature, select "Adopt and sign."

You also have the option to:

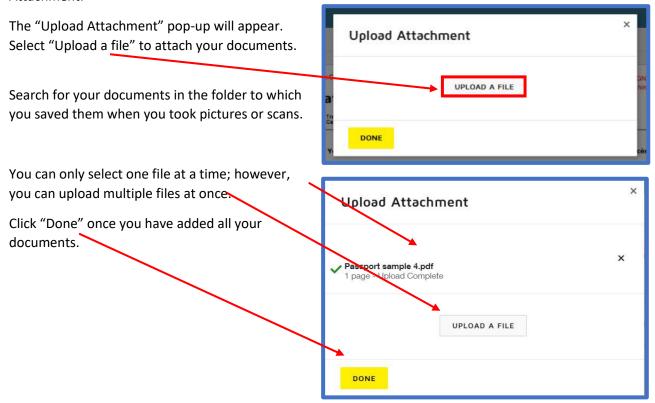
- Draw your own signature (must match supporting documentation)
  - Upload an existing signature (must match supporting documentation)
- Change the style of your digital signature

### Step 6 – Attaching supporting documentation

The next section requires you to upload your supporting documentation. Based on the information you provided in your application, there will be checkmarks next to 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."



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.

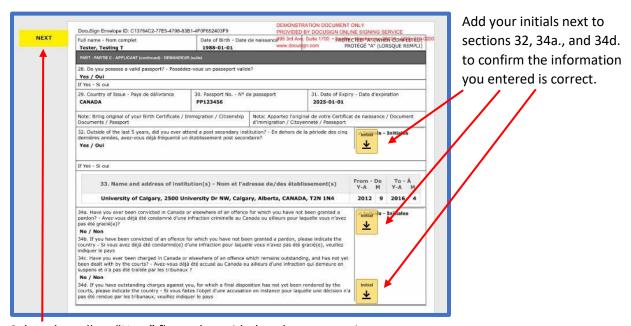
### Step 7 – Signing your application – PART C - APPLICANT

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 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.



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

# Step 8 – Signing your application – PART E – CONSENT AND CONFIRMATION



# Step 9 – 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 10 – Deleting and reuploading supporting documentation, if required

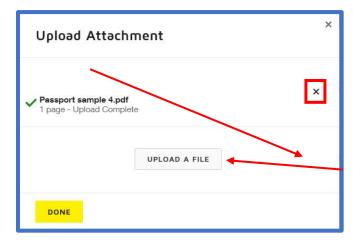
If your documents are attached upside down or sideways, they will display this way to enrolment officers and Transport Canada, and there is no way to rotate them after they've been submitted.

Please do not submit them this way.

Return to the attachment page, and click the paper clip to open your current attachments.



Select the "x" next to attachment you would like to delete.



Rotate the images using your computer or mobile device, then select "Upload a file" to reattach them.

### Step 11 – 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 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 airport's enrolment site.

Once the application is submitted book an appointment with the pass office for verification.

### 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 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: A company signing authority can see only the first page of your application, which includes your given names and surname, date of birth, occupation, and application reason.

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 my company signing authority to decline my application in DocuSign?

A: Your company signing authority may decline your application if they are not expecting to receive an application from you.

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 or if your supporting documentation is not clearly legible. This may be done before they invite you to book a verification appointment, 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.

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?

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 your company signing authority 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.