



Frequently Asked Questions Policies & Procedures Manual Templates

Table of Contents

| | |
|--|----------|
| <i>Does CMBA Ontario offer manuals for brokerages?.....</i> | <i>1</i> |
| <i>What types of manuals does CMBA Ontario offer?.....</i> | <i>2</i> |
| <i>Does CMBA Ontario have a policies and procedures manual for FINTRAC or money-laundering/terrorist financing regulations?.....</i> | <i>2</i> |
| <i>I purchased CMBA Ontario's policies and procedures manual more than 12 months ago. Can I get an updated version now?</i> | <i>2</i> |
| <i>Where do I go to purchase the CMBA Ontario manual templates?.....</i> | <i>3</i> |
| <i>I am a CMBA Ontario member. How do I get the discount?.....</i> | <i>3</i> |
| <i>Can I share the Manual Template with another brokerage or administrator?.....</i> | <i>4</i> |
| <i>I forgot my password for the CMBA Ontario Member Portal, what do I do?.....</i> | <i>4</i> |
| <i>I forgot my password for the CMBA Ontario Education portal, what do I do?</i> | <i>5</i> |
| <i>I have purchased the CMBA Ontario Manual Template. Where do I get the document?.....</i> | <i>8</i> |

Does CMBA Ontario offer manuals for brokerages?

Yes! CMBA Ontario offers templates to help brokerages and administrators get started in drafting their own manual for their business. It is important to note that CMBA Ontario manuals cannot be used as-is. They must be adapted, adjusted, and modified to be suitable for the brokerage or administrator that will be implementing the document.

What types of manuals does CMBA Ontario offer?

The most popular manuals are:

- Brokerage Policies & Procedures Manual template
 - Members \$299+HST, Non-Members \$499+HST
- Administrator Policies & Procedures Manual template
 - Members \$999+HST, Non-Members \$1,499+HST

There are also other manuals:

- Business Continuity Plan template
 - \$899+HST
- Data Security & Privacy Breach Incident Response Plan template
 - \$1,199+HST

Does CMBA Ontario have a policies and procedures manual for FINTRAC or money-laundering/terrorist financing regulations?

Yes! This is embedded into the brokerage and administrator policies and procedures manual templates. You will need to purchase the template in full to obtain the specific section related to the requirements under Proceeds of Crime (Money Laundering) and Terrorist Financing Act (PCMLTFA) and its regulations.

If I purchased CMBA Ontario's policies and procedures manual in the past, can I get the FINTRAC or money-laundering/terrorist financing section only?

Only if you purchased the manual within the past 12 months.

The purchase of CMBA Ontario's manuals is valid for a 12-month period, where you have access to the portal during this period and can download any updated versions directly.

If you purchased the manual more than 12 months ago, you will need to pay for the manual in full to gain access for another 12 months, which includes all updates made during this time.

I purchased CMBA Ontario's policies and procedures manual more than 12 months ago. Can I get an updated version now?

No, the manual template is valid for 12-months after purchase, therefore since more than 12 months has elapsed since your purchase, you will need to purchase the manual template again.

Where do I go to purchase the CMBA Ontario manual templates?

You can go to our education portal here, under the Manuals folder:

<https://www.cmbaacademy.ca/course/index.php?categoryid=15>

You will need to have a username and password to purchase the manual. This is the same username and password that you used to access CMBA Ontario's Private Mortgages Course or Continuing Education Course. This site is **not** the same as the CMBA Ontario member site.

I am a CMBA Ontario member. How do I get the discount?

You will need to login to the CMBA Ontario member portal to get the coupon code. Here is the procedure to purchase a manual as a CMBA Ontario member:

1. Login to the CMBA Ontario Member Portal:
<https://members.cmbaontario.ca/>
 - Use the "Forgot your password?" tool to reset your password
2. Once logged into the CMBA Ontario Member Portal, look at the top green bar for this link "DISCOUNT CODE: Policies & Procedures Manual Template"
3. A new window will open, and the code will be presented in the middle of the screen. Copy this code
 - NOTE: This code changes each time, therefore you must use it right away. This code cannot be shared with others.
 - This code can also be used for ANY of the other Manuals
4. Login to the CMBA Ontario Education Portal:
<https://www.cmbaacademy.ca/course/index.php?categoryid=15>
 - Use the "Find username/password" tool if you forgot your username or password
5. Click on the Manual Template you wish to purchase (the discount code works for any of the manuals)
6. Scroll down and paste the code into this field "Coupon Code"
 - Look for the Coupon Code field at the bottom of the page
7. Pay for the course using your Credit Card or Paypal (you do NOT need a Paypal account)
8. Once completed, you will have access to download the templates. Follow the steps inside the website, there is an overview document, then a disclaimer, and then you will have access to a page where you can download the templates directly onto your computer/laptop

Can I share the Manual Template with another brokerage or administrator?

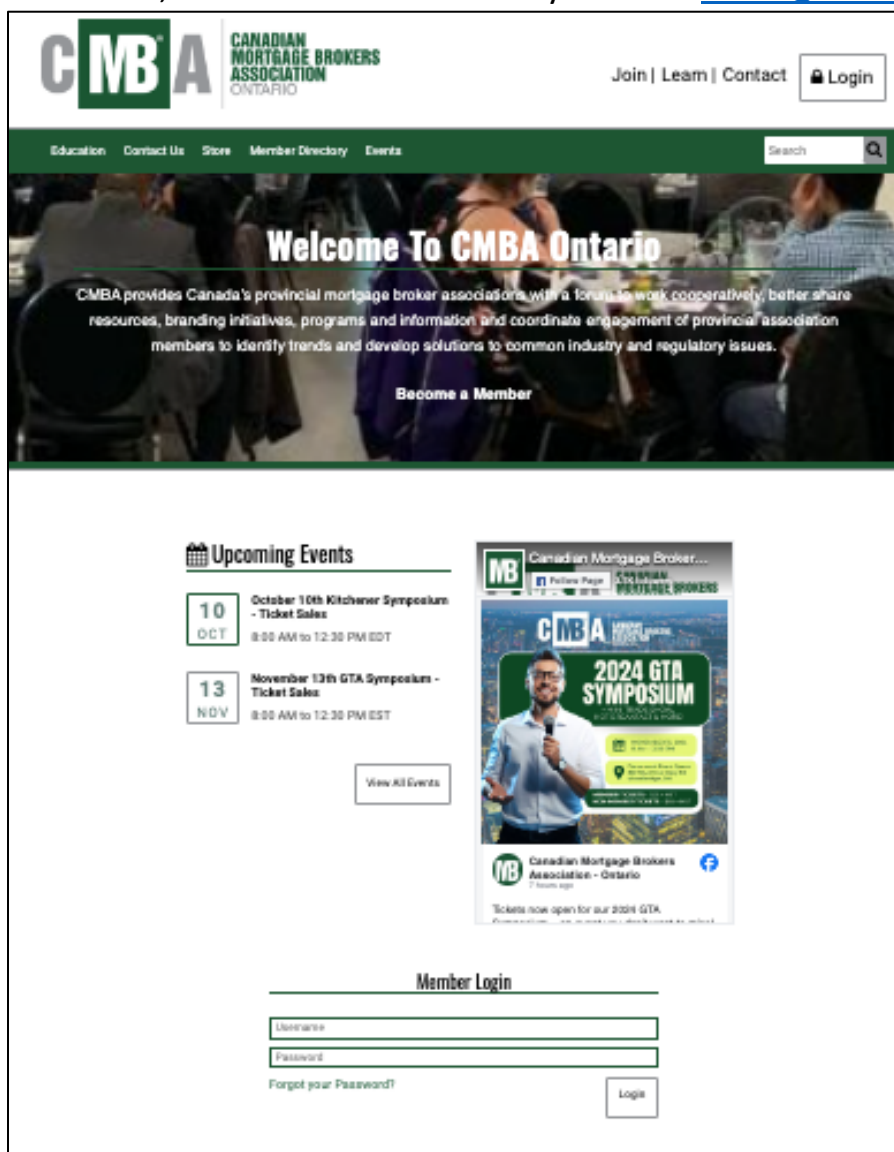
No. This document is the property of CMBA Ontario and is for the use of the purchaser only. It cannot be shared.

I forgot my password for the CMBA Ontario Member Portal, what do I do?

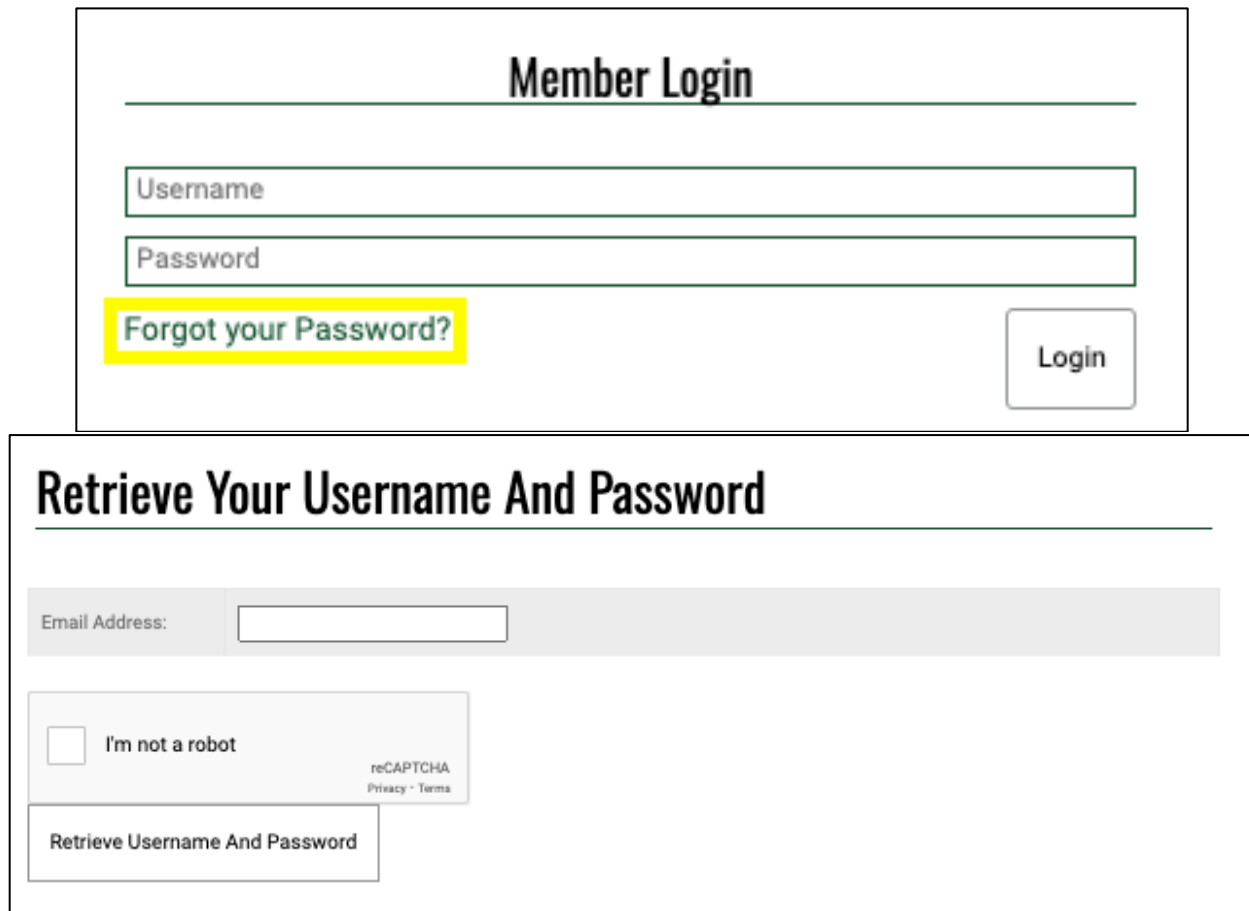
If you are looking for your CMBA Ontario member discount code, go to this website: <https://members.cmbaontario.ca/>

Scroll down, and look for the “Forgot your password” link. In the next window, enter the email you would have used. You should receive an email within the next 5-15 minutes. See images below.

For further assistance, contact CMBA Ontario by email at office@cmbaontario.ca



The screenshot shows the CMBA Ontario Member Portal website. At the top, there is a navigation bar with the CMBA Ontario logo, the text "CANADIAN MORTGAGE BROKERS ASSOCIATION ONTARIO", and links for "Join | Learn | Contact" and a "Login" button. Below the navigation bar is a green banner with the text "Welcome To CMBA Ontario" and a description of the association's purpose. A "Become a Member" button is also present. The main content area features a section titled "Upcoming Events" with a calendar view showing two events: "October 10th Kitchener Symposium - Ticket Sales" and "November 13th GTA Symposium - Ticket Sales". To the right of the events is a promotional image for the "2024 GTA SYMPOSIUM". At the bottom of the page is a "Member Login" section with fields for "Username" and "Password", a "Forgot your Password?" link, and a "Login" button.



The image contains two screenshots of the CMBA Ontario Education portal. The top screenshot is the 'Member Login' page, featuring a title bar, a 'Username' input field, a 'Password' input field, a 'Forgot your Password?' link highlighted in yellow, and a 'Login' button. The bottom screenshot is the 'Retrieve Your Username And Password' page, featuring a title bar, an 'Email Address:' label with an input field, a reCAPTCHA box with the text 'I'm not a robot' and 'reCAPTCHA Privacy - Terms', and a 'Retrieve Username And Password' button.

I forgot my password for the CMBA Ontario Education portal, what do I do?

If you are looking to download the manual or access a course, go to this website:

<https://www.cmbaacademy.ca/>

On the left-hand side, login using your username and password. This will be the same username and password that you used to access the CMBA Ontario Private Mortgages Course or Continuing Education Course.

Click on the “Find username/password” box. See images below.


A new window will open.

Enter your email address that you would have used.

If we can find you in the database, an email will be sent to your email address within the next 5-15 minutes with instructions how to get access again.

IF YOU ENTER AN INCORRECT EMAIL ADDRESS OR AN ADDRESS NOT ASSOCIATED WITH AN ACCOUNT, YOU WILL NOT RECEIVE AN EMAIL.


For further assistance, contact CMBA Ontario at office@cmbaontario.ca



CANADIAN MORTGAGE BROKERS ASSOCIATION


ONTARIO

PROFESSIONAL DEVELOPMENT



CANADIAN MORTGAGE BROKERS ASSOCIATION

ONTARIO



PROFESSIONAL DEVELOPMENT

NEED ASSISTANCE?

Contact CMBA Ontario at education@cmbaontario.ca for any assistance. Please allow 24-48 hours for a response.



LOGIN

Please be advised that this Educational platform and the CMBA membership portal do not connect. Therefore when setting up a profile on either side, you may have to recreate logins and passwords.



Username / email



Password

☒ Remember username

Log in

Create new account

Find username/password

Course categories



(3)

Mortgage Agent Course



(3)

Private Mortgages



(1)

Mortgage Broker Course



(1)

Out of Province Course



(1)

Underwriting Course





(3)

Manuals





(3)

Additional Items


LOGIN


Please be advised that this Educational platform and the CMBA membership portal do not connect. Therefore when setting up a profile on either side, you may have to recreate logins and passwords.

 Username / email

 Password

☒ Remember username

Log in

Create new account

Find username/password

[Home](#)
[Log in](#)
[Forgotten password](#)

To reset your password or retrieve your username, submit your email address below. If we can find you in the database, an email will be sent to your email address, with instructions how to get access again. IF YOU ENTER AN INCORRECT EMAIL ADDRESS OR AN ADDRESS NOT ASSOCIATED WITH AN ACCOUNT, YOU WILL NOT RECEIVE AN EMAIL.

Search by email address

Email address

Search

I have purchased the CMBA Ontario Manual Template. Where do I get the document?

This answer is applicable for both the Brokerage and Administrator manual templates.

To access the documents, you can download it directly online, on your own! Once you have purchased the manual, you go back to the CMBA Ontario Education portal. Here is the link:

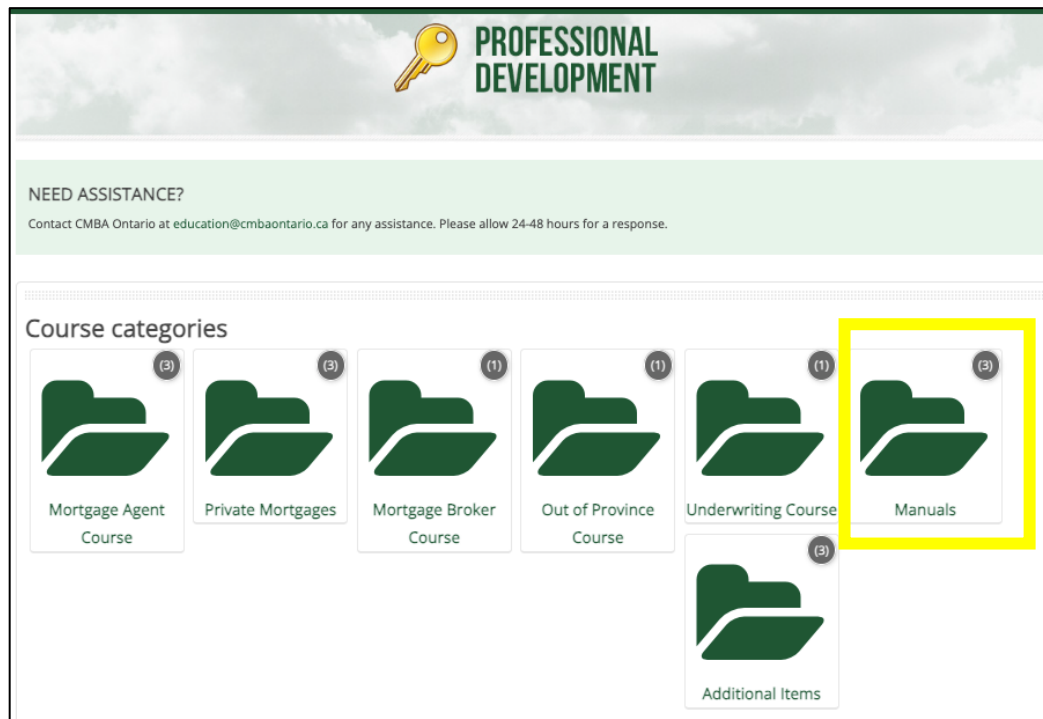
<https://www.cmbaacademy.ca/>

Log in

Go to the “My courses” menu at the top left of the page, and you should be able to get to the manual webpage directly.



If you cannot see it in your “My Courses” shortcut, you can find it by clicking on the Manuals folder

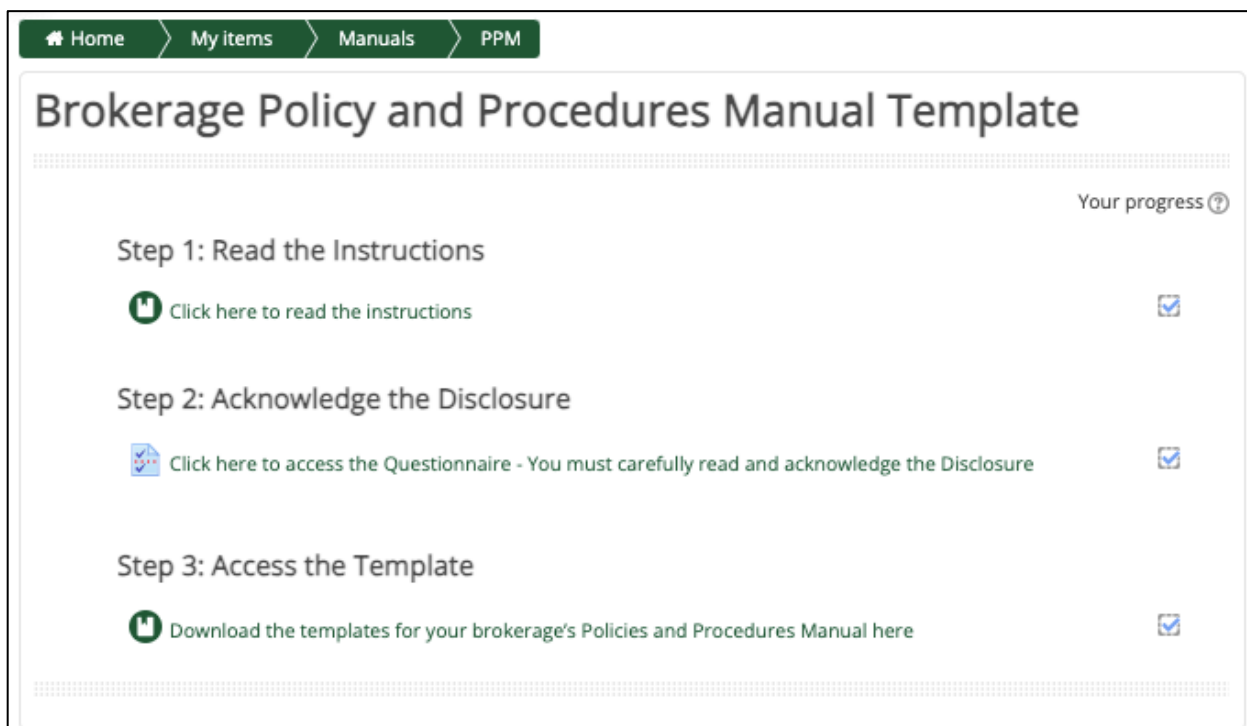


Once you are inside the Manual template, you will need to complete the following steps:

Step 1: Read the instructions. Click through and read the information until the end. Once you are on the last slide, click on “Exit Activity”, the red button at the top right of the screen

Step 2: Read and acknowledge the disclosure. This is required to make sure that you will make all necessary adjustments to the templates to reflect your business needs. CMBA Ontario is not responsible for the compliance of your brokerage/administrator business.

Step 3: Download the documents. This will open in a new window and you can download the documents in Word format. This will allow you to make the adjustments directly in the document.





Home My items Manuals PPM



Brokerage Policy and Procedures Manual Template

Your progress ?


Step 1: Read the Instructions

 [Click here to read the instructions](#) 

Step 2: Acknowledge the Disclosure

 [Click here to access the Questionnaire - You must carefully read and acknowledge the Disclosure](#) 

Step 3: Access the Template

 [Download the templates for your brokerage's Policies and Procedures Manual here](#) 