



Law Society of Alberta

# **Trust Safety: PwC Connect Tool Upload**

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## 1. Background

Rule 119.30(5) requires law firms to submit the firm's trust account data electronically to the Law Society of Alberta (LSA) on an annual basis.

In an ongoing effort to improve our processes, Trust Safety has partnered with PwC which will replace the current Accellion secure file sharing site. Law firms are still required to submit their Trust Safety Annual Filings by March 31, 2019, but how the electronic data is uploaded is changing with the transition to a new data analytics service provider.

The new PwC Connect tool allows the Law Society to review the data in aggregate and provide useful Law Firm metrics back to the profession to assist in decision making and the proper management and administration of a trust account. It also helps to address lawyers' concerns about the number of approved software vendors.

This will allow law firms to use any of the eight-approved trust accounting software vendors to generate their trust accounting data. It will create efficiency in the vetting process and ensure the accuracy of the data provided by Lawyers.

The Responsible Lawyer is accountable for all filing requirements of the law firm, as per Rule 119.3(1).

Law firms will be required to use the connect tool to upload their trust account(s) data electronically effective January 1, 2019.

## 2. Logging In

You can log in securely to the Connect Tool from any computer with Internet connectivity.

1. You will receive an email from [pwc\\_it\\_comms@us.pwc.com](mailto:pwc_it_comms@us.pwc.com) to the email address we have listed on file for you. This message will contain your temporary password. Your temporary password is required for setting up your account. You will need to wait for the second email containing more information, before you can log in.

### **Welcome!**

Dear Anjanie Marathe,

A PwC account has been generated for you. Please note the following regarding your account:

- Your temporary password is **865788QW!@#%\*^&\*()89119**
- Your temporary password will expire upon first use. After your initial login, you will be prompted to change your password and select security questions and answers.
- You may receive an email with application specific login instructions.

**Please do not reply to this automated message.** If you need help, have questions, or need to make changes to the above registration, please request assistance from your PwC Contact.

2. You will receive another email with your specific log in information. You can log into the Connect site by clicking on the URL listed at the bottom of the email: <https://ghw.connect.pwc.com>.  
*Please do not bookmark this page as it causes issue with the embedded redirects.*

### **Connect**

Welcome to Connect! Connect is PwC's coordination workflow tool, providing fast, efficient and secure information sharing at every stage of the audit.

Need to get acquainted with Connect? You can find easy to use reference materials within our Help function, or watch this video: [https://video.pwc.com/media/t/1\\_pusuif89](https://video.pwc.com/media/t/1_pusuif89)

**If you have an existing log-in and password with PwC**, you can log-in and access the site at this time.

**If this is the first time that you are being registered with PwC**, you will receive an additional email from PwC IT Comms ([pwc\\_it\\_comms@us.pwc.com](mailto:pwc_it_comms@us.pwc.com)) containing your temporary password. If you do not receive this email within an hour, please contact your PwC engagement team as you will be unable to log in without this information.

You have been granted access to the following Connect site: LSA Annual Reporting.

You may access the site by navigating to the following URL:

<https://ghw.connect.pwc.com/sites/434b2f4ecbba0c63>

3. Click on the URL at the bottom of the email and you will be redirected to the PwC site. The login window will appear, and you will be prompted to enter your email address. The screen below is the first screen you will see whenever you log into PwC Connect.

**pwc**

**Log In**

Email:

By clicking Log In, you confirm you have read how PwC uses [cookies](#) and you consent to that use on your devices.

Remember Me

**Log In**

**Need help logging in?**  
[Frequently asked questions](#)

4. After you enter your email address and click on “Log In”, you will be directed to the Clients and Visitors page. Next you will be required to enter the temporary password listed in the email you first received from PwC. After the first log in you will need to use the password you have created.

5.

**Log In**

**Clients and visitors**

Email:

Password:

By clicking Log In, you confirm you have read how PwC uses [cookies](#) and you consent to that use on your devices.

**Log In**

**Need help logging in?**  
[Frequently asked questions](#) | [Forgot your password](#)

5. You will be prompted to change your password upon successful login. The password should contain the following:

- Minimum of 8 characters in length.
- Contains at least 1 upper case letter.
- Contains at least 1 lower case letter.
- Contains at least 1 number.

*Please note, your password expires every 90 days.*

Your password has expired. Enter your current password and the new password in the fields below. Your new password can contain upper and lowercase characters, numbers and special characters. As you enter your new password, the check boxes at the bottom will indicate if your new password meets the Pwc password requirements.

*Tip: Your password cannot match one of your previous 8 passwords or contain your first or last name.*

**Current Password:**

**New Password:** ✓

**Confirm New Password:** ✓

**Submit**

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***New password requirements:***

- ✓ Minimum of 8 characters in length.
- ✓ Contains at least 1 upper case letter.
- ✓ Contains at least 1 lower case letter.
- ✓ Contains at least 1 number.

## Password Recovery

1. If you have forgotten your password, you can reset it yourself using the "Forgot your password" option located at the bottom of the login page. You will need to remember your recovery questions and responses. Once you enter the requested information, a temporary password will be emailed to you.

**Log In**

 Your email address or password is incorrect. Please try again.

**Clients and visitors**

Email:

Password:

By clicking Log In, you confirm you have read how PwC uses [cookies](#) and you consent to that use on your devices.

**Log In**

**Need help logging in?**  
[Frequently asked questions](#) | [Forgot your password](#)

### 3. Account Setup

1. Once your new password has been accepted, you will need to set up your account by selecting three security questions and answers. This will assist you with logging in if you forget your password. Once you are done selecting the questions and answers please click Submit.

***Set security questions & answers***

Select and answer 3 security questions from the pre-defined questions below. If you forget your password or want to manage your account, we will ask you to answer your security questions. If answered correctly, you will be permitted to perform your requested action.

When selecting a security question, choose an answer that is

- Memorable, but not easy to guess.
- Not likely to change over time.
- Not associated with your username or password in any way.
- A minimum of 3 characters in length.

Please ensure that there are no duplicated questions or answers and for your security, never tell anyone and do not write it down.

Question 1:

Please choose a question ... ▼

Answer:

Question 2:

Please choose a question ... ▼

Answer:

Question 3:

Please choose a question ... ▼

Answer:

**Submit**

## 4. Requests

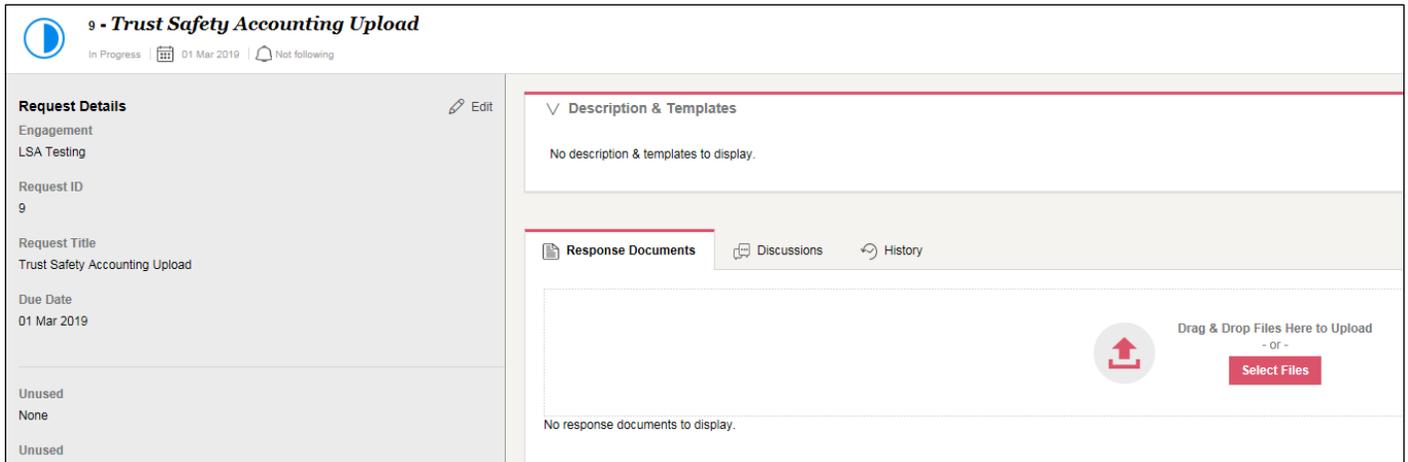
1. Once you log in, you will be directed to the Requests page. The request page lists your annual filing requirement and provides a record to respond to. You will be able to submit your filing by accessing the request that is assigned to you.

Group	Request	Status	Due Date	Request Owners
Interim <b>14</b>				
--	Canada 2 - Revenue client final Revenue Walkthrough	Returned	26 Apr 2018	Rosemary J Monk Nicholas Rymcza
--	Canada 3 - Cash 23 Cash Walkthrough	Returned	26 Apr 2018	Daniel Malcik

2. To view the request, click on the request title to access the details of the request. Once you are in the request page, you will be able to see the details (ie. Due Date).

## 5. Submissions

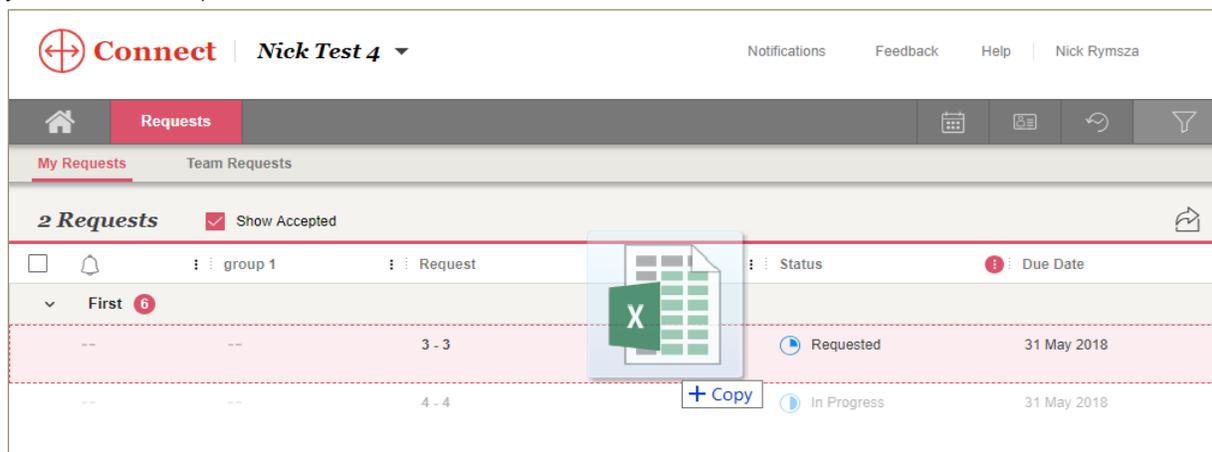
1. To submit your filing to Trust Safety, you will need to click on the “Response Documents” tab in the request.



2. Select and drag the files that were generated by your software into the using the following two options:

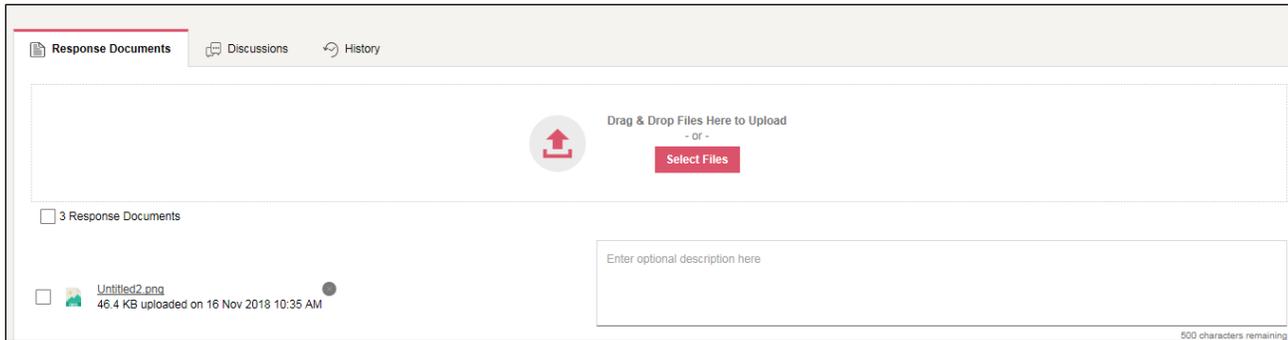
### Drag & Drop

- Select and highlight the documents generated by your software from your desktop or windows folder;
- Drag & Drop files into the row of the desired request on the Requests view (this will highlight pink when you hover over it)

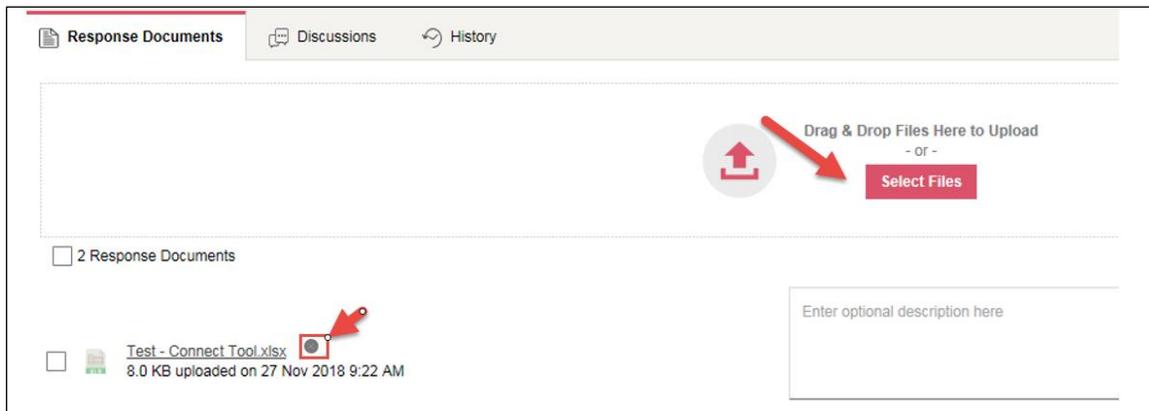


### Select Files

- Click on “Select Files”
- Locate the files on your computer and click open at the bottom of the dialog box
- The files should be displayed in the request.



**To delete an attachment, click on the “x” next to the file. Please note, files cannot delete files once the request has been submitted.**



## 6. Discussions

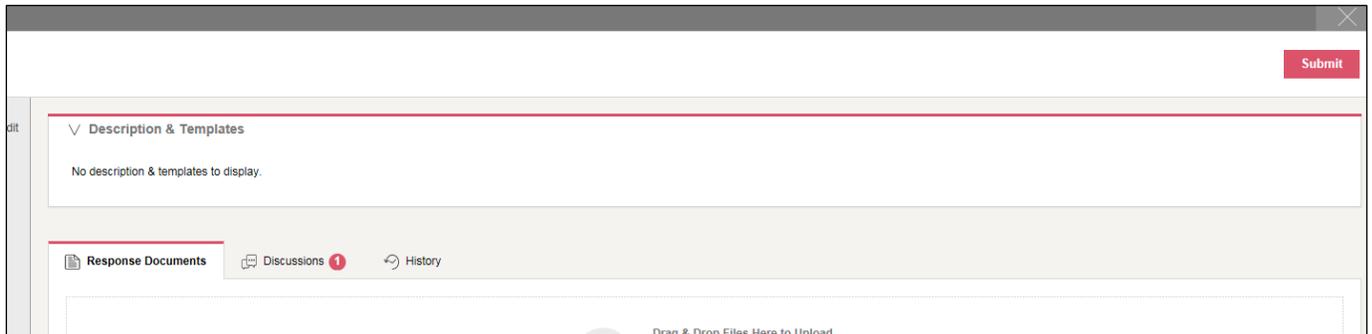
1. To start a discussion with Trust Safety regarding your request, click on the Discussions tab in the request.

The screenshot shows the 'LSA ANNUAL REPORTING' interface. The main header displays '9 - Trust Safety Accounting Upload' with a 'Submit' button. The left sidebar contains 'Request Details' including engagement type, request ID, title, and due date. The main content area has tabs for 'Response Documents', 'Discussions', and 'History'. Under the 'Discussions' tab, there are sub-tabs for 'Open Topics' and 'Closed Topics'. A message states 'There are no open discussions related to this request.' with an 'Add a Discussion' button.

2. Click on Add a Discussion. You will need to provide a title and add a comment. Once you are done entering your comments, click Save.

The 'Add New Topic' dialog box contains a warning message: 'Warning: This discussion will be visible to all users with access to this request.' Below this, there is a 'Topic Title' text input field with a '250 characters remaining' indicator. A 'Discussion Comment (Optional)' text area follows, with a placeholder 'Get the discussion started by adding the first comment' and a '1000 characters remaining' indicator. The 'Responders' section shows a list of users: 'Danielle Postnikoff' and 'Anjanie Marathe'. At the bottom right, there are 'Save' and 'Cancel' buttons.

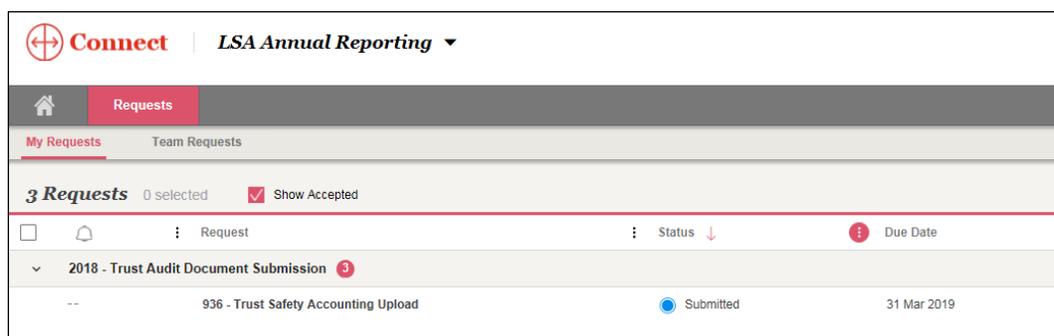
3. Once you are satisfied with all the information has been entered, click on the Submit button at the top right-hand side.



## 7. Frequently Asked Questions

### Question 1: How can I tell if my request was submitted successfully?

Members can confirm whether their request was submitted and accepted by looking at the status of the request on the main page.



### Question 2: Can I give access to someone else at my firm? How do I set them up?

Members can provide access to their office administrators or accounting staff by contacting Trust Safety at [trust.safety@lawsociety.ab.ca](mailto:trust.safety@lawsociety.ab.ca)

### Question 3: How do I make edits to response documents or delete documents attached to requests?

You can only upload a new document for updates as edits cannot be saved within Connect. To update a response document, open the request, navigate to 'Response Documents' tab and select the 'X' next to the attached document to delete. Upload a new response document.

### Question 4: How can I manage the emails I receive from Connect?

You can manage your email notification preferences related to a Connect site by accessing your User Preferences. You can change your notification preferences by accessing your profile.

### Question 5: I received a dialog saying that my session is about to time out. What does this mean?

For security purposes, after authenticating into a Connect site, the system keeps track of how much idle time has passed since there has been any activity in the site. After a period of 25 minutes of idle time, the system will prompt the user with a session timeout pop-up which allows the user to extend their session or to log out.

### Question 6: Can I be notified of changes made to certain requests?

Yes, you can follow requests that you have access to. You can choose to receive in-site notifications, with or without email notifications. Follow preferences can be set on individual requests or in bulk by selecting requests in the Requests view and clicking "Follow Actions" at the top right of the grid. The same procedure can be used to bulk remove follow preferences.