

Submitting a report

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Document summary

Most transfer payment programs require you to report on deliverables as part of the transfer payment agreement. The specifics and timing of these deliverables are dependent upon the requirements of the transfer payment program and vary from program to program.

This document outlines how you can download the report in Transfer Payment Ontario and how to upload them electronically.

Before you begin

Since Transfer Payment Ontario is used by all Ontario ministries, the reference guides and videos found on the Transfer Payment Ontario website are generic. As you work on your report, you may see screens, fields or information not presented in the guide. Be sure to reference any supporting documentation or instructions provided by the funding ministry.

Transfer Payment Ontario uses a dynamic PDF form for certain report types. The PDF form must be opened using the Adobe Reader software. If you do not have Adobe Reader, you can download a free version at get.adobe.com/reader.

Report statuses

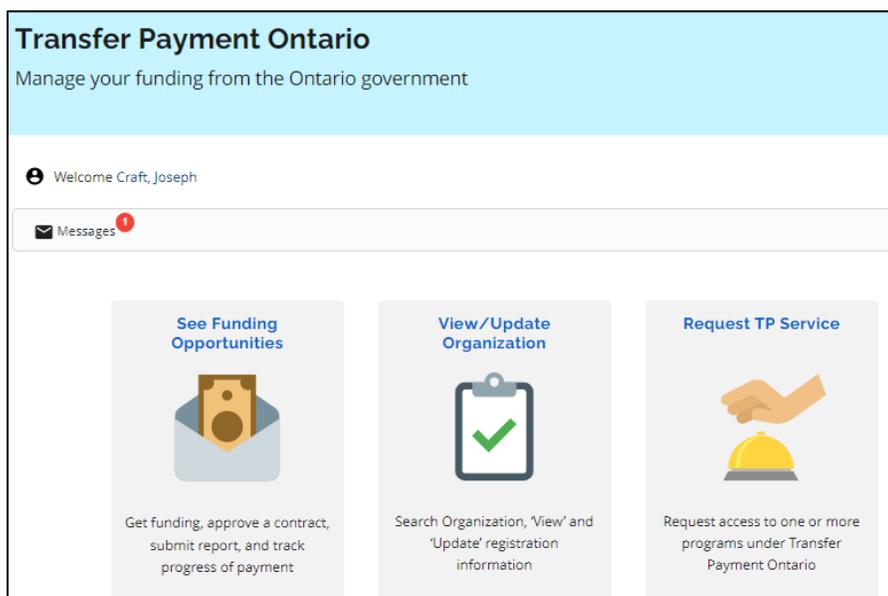
As you complete and view reports, you will see three available report statuses:

- **Pending:** You have an outstanding report.
- **Submitted:** Your report has been submitted to the ministry.

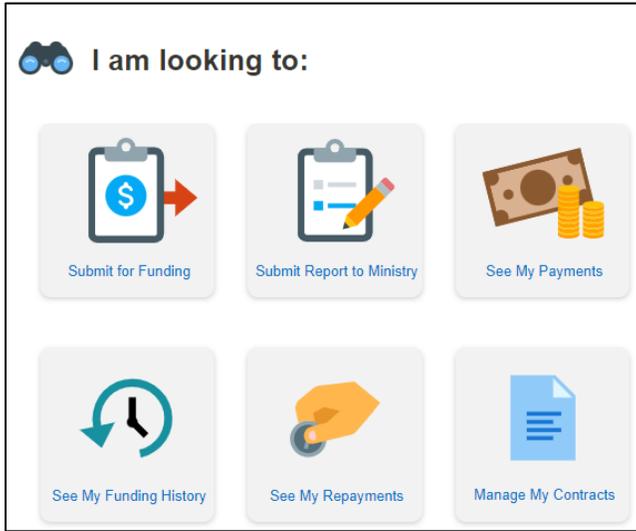
Note: If the ministry requires more information after your report is submitted, the status will revert from **Submitted** to **Pending**.

Submitting a report

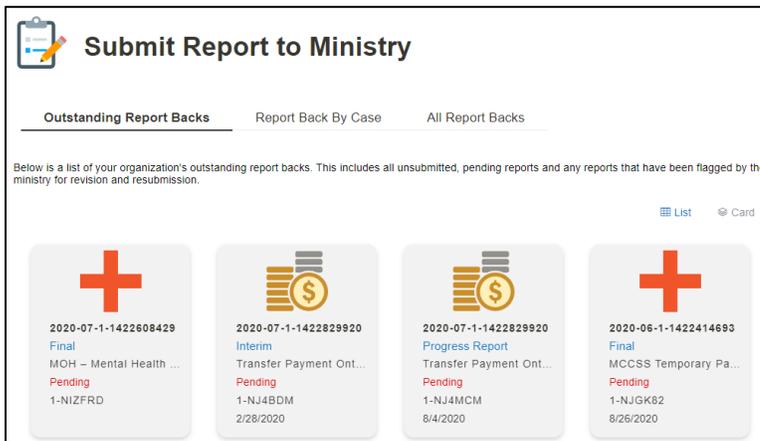
1. Sign in to Transfer Payment Ontario using a Google Chrome web browser.



2. Select **See Funding Opportunities**.
3. If you are registered with more than one organization, select the organization for which you want to submit the report. The **I am looking to:** page appears.



4. Select **Submit Report to Ministry**.



Note: You can change to a list view by selecting the **List** button.

Note: There are three tabs for reviewing reports: **Outstanding Report Backs**, **Report Back By Case** and **All Report Backs**.

5. Select the **Report Back By Case** tab.

Submit Report to Ministry

[Outstanding Report Backs](#)
 [Report Back By Case](#)
 [All Report Backs](#)

Cases

Case #▼	Program	Status
2022-05-1-1443621550	Transfer Payment Ontario Training Category (TPTC) 2020	Active
2022-04-1-1440985630	Transfer Payment Ontario Training Category (TPTC) 2020	Active
2022-01-1-1431249629	Transfer Payment Ontario Training Category (TPTC) 2020	Active

[First](#) [Previous](#) [Next](#) [Last](#)

Case #	Report Type	Report Id	Due Dat...	Status	Report Period Start	Report Period End	Resubmission Required
2022-04-1-1440985630	Activity Report	1-NTZKAQ	1/18/2022	Pending			N
2022-04-1-1440985630	Interim	1-NTZKAA	2/1/2022	Pending	9/7/2020	3/31/2021	N
2022-04-1-1440985630	Final	1-NTZKAC	8/17/2022	Pending	8/2/2021	3/3/2022	N
2022-04-1-1440985630	Activity Report	1-NTZKAO		Pending			N

6. Select the **Case #** link. The corresponding report requirements appear in the table below.
7. Select the **Report Type** link to start the report.

Step 1: Report Back Details

Reviewing program documentation

Begin by reviewing important documentation and program information provided by the ministry.

1. Select the document name in the table to download it to your device.

Submit Report to Ministry

Final

Report Back Details

2

Complete Report Back

3

Attach Supporting Documents

4

Submit Report Back

Step 1 - Report Back Details

Download Program Documentation

Below you will find a list of documentation related to this program. You are strongly encouraged to review all of this information prior to beginning your report. Click on the name of the document to download the file to your computer.

Document	Comments
Final Report Back - Ministry Instru...	Find Ministry Final Report Back Instructions and more.
Interim Report Back - Ministry Inst...	
Ministry Program Guidelines and I...	Find Ministry Program Instructions, definitions and more.

2. Review all program documentation.

Reviewing supporting attachments

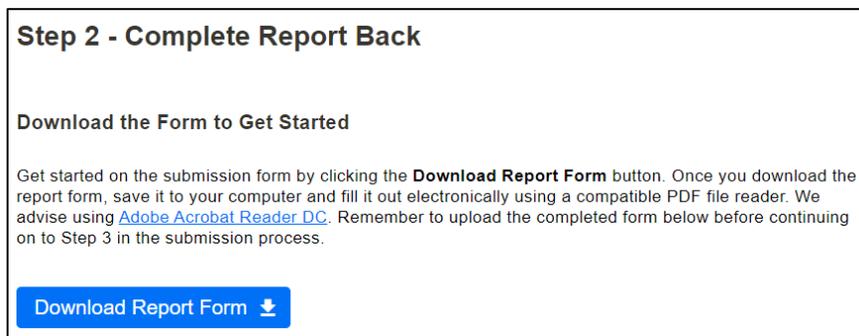
In addition to the completed report form, supporting documentation may be requested by the ministry.

1. Review the list of requested documents, if applicable. These will be uploaded in step 3.
2. Select **Next** to continue.

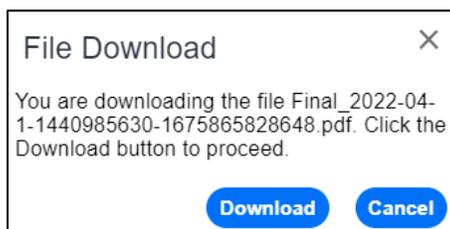
Step 2: Complete Report Back

Downloading the report form

1. Review the on-screen download instructions.
2. Select **Download Report Form**.



3. The **File Download** window appears.



Note: If the pop-up window does not appear, ensure that your pop-up blocker is disabled in your browser's settings. For detailed instructions, please see [Block or allow pop-ups in Chrome](#).

4. Select **Download**. The report form is downloaded to your device's default folder.

Note: You cannot view a PDF form with Google Chrome’s default PDF reader. If the form is a PDF, it must be opened with Adobe Reader.

Opening the report form

Funding ministries that utilize dynamic PDF reports will require that you open and complete the form using the compatible Adobe Reader software. If you do not have Adobe Reader, you can download a free version at get.adobe.com/reader.

1. Locate the downloaded report form in your device’s default folder.
2. Right-click the file to open with Adobe Reader software.

Note: If the report form is not a dynamic PDF form, it can be opened and completed using any standard word processing software, like Microsoft Word.

Note: You cannot view the dynamic PDF form in the Google Chrome web browser. The downloaded form must be opened with Adobe Reader or equivalent software.

Completing the report form

Report forms are unique to funding ministry or program requirements. Instructions and form sections may vary from those presented in this guide. Be sure to reference any supporting documentation or instructions provided by the funding ministry.

1. Take note of the **Case No.** in the top right corner of the form.
2. Review each section of the form or select **Expand** to make all sections of the form viewable.

Ontario  FINAL Transfer Payment Ontario Training Category (TPTC) 2020		Case No.: 2022-04-1-1440985630
		Saved: 02/08/2023 09:40 <input type="button" value="Expand"/> <input type="button" value="Validate"/>
Instructions	A - Organization Information	B - Report Contact Information
D - Performance Measures	H - Declaration / Signing	

3. Complete the form.

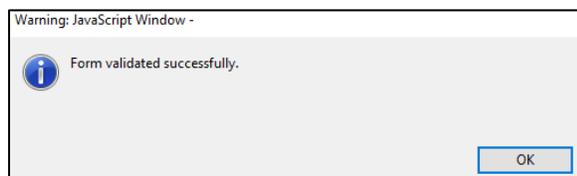
When completing the form, please keep the following in mind:

- Fields highlighted with an asterisk (*) are mandatory.
- If a mandatory text field is not applicable for your submission, enter **N/A**.
- Do not leave mandatory numeric fields blank. Enter a **0** (zero).

- Some of your organization information is prepopulated in read-only sections of the form. If your organization information is missing or needs to be updated, an administrator user of your organization can update the information in your organization's profile. Instructions are available on ontario.ca/GetFunding. Once your organization profile has been updated, a new report form can be downloaded.
 - Enter dates in the correct format or select a date from the calendar dropdown within the field.
 - Do not paste graphics, diagrams, or pictures into the form.
4. After completing the form, select **Validate** to verify all fields have been completed.

Ontario  FINAL Case No.: 2022-04-1-1440985630
Transfer Payment Ontario Training Category (TPTC) 2020
Saved: 02/08/2023 09:40
Expand Validate
Instructions A - Organization Information B - Report Contact Information
D - Performance Measures H - Declaration / Signing

5. You will receive confirmation of validation or notification of missing information:
- Your form successfully validated and is ready to be saved and uploaded. Select **OK** to continue.



- Mandatory information has not been entered or there is an error in the form. Select **OK** to review the error.



If the report form does not validate successfully, please verify that:

- you are using Adobe Reader.
- all mandatory fields have been completed.
- you have not copied any special characters or symbols from other software or webpages.
- that dates are entered in the correct format.

6. Continue to select **Validate** and correct the form until successful validation is received.
7. Save the file to your device.

Note: It is recommended to keep the original file name when saving your document.

Uploading the report form

1. Return to Transfer Payment Ontario and continue your submission.
2. Select **Step 2- Complete Report Back**.
3. Scroll down to **Upload Your Completed Form**.

Upload Your Completed Form

Before uploading the report form, make sure you're not missing any information by clicking the **Validate** button (located on the first page of the form). After you validate and save the completed form, upload it to the system by choosing a file, optionally adding a comment, and clicking the **Upload Report Form** button.

If you've revised your report form and wish to re-upload it to the system, check that you're using a file name that's different from a previous upload. For example, if you named your original file report.pdf, make sure that the next file is named something else, such as report_version_2.pdf. We recommend saving any previous versions of your form to your computer, as only the latest upload is kept in the system.

[Upload Report Form](#)

4. Review the on-screen upload instructions.
5. Select **Upload Report Form**.

File Name:★

Comments:

Warning: By clicking "Upload", your report will be sent to Transfer Payment Ontario and you will not be able to make further changes.

[Upload](#) [Cancel](#)

6. Select the magnifying glass icon in the **File Name** field. The **Add Attachment** pop-up appears.

Add Attachment

Please specify a File Name or URL:

File Name: No file chosen

[Cancel](#)

7. Select **Choose File**.
8. Locate the completed report form on your device.
9. Select **Open**.

File Name:★ Final_2022-04-1-1440985630-1... 

Comments:

Warning: By clicking "Upload", your report will be sent to Transfer Payment Ontario and you will not be able to make further changes.

Upload  Cancel

10. Select **Upload**. The form uploads to Transfer Payment Ontario.

Note: If the report form does not upload, ensure that the form was successfully validated, is the correct case number, and that you are not uploading a printout or scan of the form.

Note: The Transfer Payment Ontario system may take longer to process larger report forms. If the page becomes unresponsive, select the option to **Wait** when prompted.

Note: You may receive an error if attempting to upload a file that has already been uploaded to the system. Try changing the name of the file and attempt upload again.

Step 3: Attach Supporting Documents

Reviewing supporting attachments

1. Review the list of requested documents, if applicable.

Review Supporting Attachments

Review this list to make sure that you've gathered the proper supporting attachments to upload. Note that each attachment is identified as either mandatory or optional. For more information about the supporting attachments, please refer to the program documentation that you downloaded in Step 1.

Attachment Type	
Final Report	Mandatory
Final Report Back - Completed Form	Mandatory
Invoice	Optional

Uploading supporting attachments

1. In the table below, select **+Add**.
2. Locate the file from your device and select **Open**. The file name appears in the table.
3. In the table, select the **Attachment Type** from the dropdown list.

Reviewing organization attachments

You will also find a list of organization documents that were uploaded during the organization registration process. These will accompany your submission and be viewable by the funding ministry.

1. Review the documents.
2. If changes are required, edit the documents in your organization profile.
3. Select **Next** to continue.

Step 4: Submit Report Back

1. Review the on-screen submission instructions.

Step 4 - Submit Report Back

This is the final step in the report submission process. Once you've clicked the **Complete Submission** button, you **won't be able to make any further changes to the report form uploaded in Step 2** without contacting the Transfer Payment Ontario Client Care team for assistance. If necessary, you can still upload additional supporting documents after submitting.

[Complete Submission](#)

2. Select **Complete Submission**. A confirmation message appears, and the report status changes from **Pending** to **Submitted**.

Note: After you select **Complete Submission**, you cannot make changes to your report form. If you want to make changes after submitting, you will need to contact the Transfer Payment Ontario Client Care team.

Continuing a report

If you have already started a report, you can continue your submission in Transfer Payment Ontario.

1. Return to Transfer Payment Ontario and select **See Funding Opportunities**.
2. If you are registered with more than one organization, select the organization for which you want to submit for funding. The **I am looking to:** page appears.
3. Select **Submit Report to Ministry**.
4. Locate the report from the table using the same **Case Number** and **Report ID**.
5. Select the report to continue the submission process.

Note: The case number and report ID on your report form must match the case number and report ID for your submission in Transfer Payment Ontario.

Creating a report (ad hoc)

The funding ministry may allow for reports to be created by your organization. If applicable, create a new report submission in the reports table.

1. Sign in to Transfer Payment Ontario using a Google Chrome web browser.
2. If you are registered with more than one organization, select the organization for which you want to submit for funding. The **I am looking to:** page appears.
3. Select **Submit Report to Ministry**.
4. Select the **Report Back by Case** tab.
5. Locate and select the case.
6. In the table below, select **+New** to create a new report.

Case #	Report Type	Report Id	Due Date	Status	Report Period Start	Report Period End	Resubmission Required
2023-03-1-1473598851	<input type="text" value=""/>	1-ODYK7K		Pending			N
2023-03-1-1473598851	Progress Report	1-ODCAM8		Submitted			N

7. Select the magnifying glass icon to choose applicable **Report Type**.
8. Select **Ctrl+S** to save.

Case #	Report Type	Report Id	Due Date	Status	Report Period Start	Report Period End	Resubmission Required
2023-03-1-1473598851	Interim Report	1-ODYK7K		Pending			N
2023-03-1-1473598851	Progress Report	1-ODCAM8		Submitted			N

9. Click the report type link. The submission process begins.

Submit Report to Ministry
Interim Report

Step 1 - Report Back Details

Download Program Documentation

Below you will find a list of documentation related to this program. You are strongly encouraged to review all of this information prior to beginning your report. Click on the name of the document to download the file to your computer.

10. Complete the report as outlined in the above section of this guide.

Contact us

If you need assistance, please contact Transfer Payment Ontario Client Care from Monday to Friday 8:30 a.m. to 5:00 p.m. except for government and statutory holidays, at:

Toll-free: 1-855-216-3090

TTY: 416-325-3408

Toll-free TTY: 1-800-268-7095

Email: TPONCC@ontario.ca

There are a variety of Transfer Payment Ontario reference guides and videos available online. Visit ontario.ca/GetFunding to learn more.