

Full Text Version of:

Transfer Payment Ontario: How to review and approve a contract

There is a decorative compass on the title page and a short musical introduction plays.

Welcome to Transfer Payment Ontario: How to review and approve a contract.

The speaker icon is shown in a system tray.

For an optimal learning experience and best performance, turn your audio on. For this 5-minute video, there is a text-only version to meet AODA standards, however, if it is not suitable to meet your needs, do not hesitate to contact: TPONCC@ontario.ca. As the interface is updated, its look may change over time, but the instructions are still valid.

Behind the items listed is an image of a decorative compass.

In this video, you will learn how to review a Contract approve a Contract

Once a Contract is ready for your review and approval in Transfer Payment Ontario, you will receive an email notification. The email will list the Contract Number, Contract Name, and Contract Created Date. To access the contract navigate to Transfer Payment Ontario.

A new browser window appears, the URL is entered into the first field and the webpage appears, called 'Get funding from the Ontario government.' It includes the words 'Find out what funding your organization could receive from the Ontario Government and learn how to register with Transfer Payment Ontario, the 'Log in to Transfer Payment Ontario' button, then text indicating 'On this page, 1 Overview, 2 Register for Transfer Payment Ontario, 3 Available funding, 4 Get help, 5 Contact us,'

Or, to access our webpage, enter the URL into your browser. We recommend Google Chrome.

<http://ontario.ca/getfunding>

Select your language from the top right corner, and then log in, or scroll down for instructions, resources, and contact information.

A hand appears and selects the log in button

Text on this page says Transfer Payment Ontario. Sign in with your ONE-key ID. New to ONE-key? A ONE-key account gives you secure access to Ontario Government programs and services. Learn more. Don't have a ONE-key ID? Sign up now! Or sign in with GO-secure. GO Secure is used specifically by individuals within the Ontario government and the broader public sector.

Use One-Key to log in to Transfer Payment Ontario, or if you already have a Go Secure account, use it to access the system.

The hand indicates each login area, selects each One-Key field, then selects the Sign In button

Three different options appear with decorative images, and these words, 'View/Update Organization. Search Organization, View and Update registration information. Request TPO Service. Request access to funding resource. See Funding Opportunities. Get funding, submit a report, approve a contract and track progress.'

From this page you can view or update your organization's information, request access or view the status of current requests for Transfer Payment Ontario, and see funding opportunities. Select "See Funding Opportunities".

The hand selects See Funding Opportunities.

There are three sections on the See Funding Opportunities page. Under Transfer Payment Services is the list of organizations showing the legal name, TP Service and Access Type for each. Below this are sections labeled Pending/Rejected Request and Request Access to TP Service.

This screen will only appear if your account is associated with multiple organizations. You will see a list of organizations associated with your account. Select the organization whose contract you wish to approve.

The hand selects the organization.

This is the "I am looking to" page. When last visited we selected Submit for Funding. On the right it greets you, shows your name and the organization name, and below that, links to recently viewed cases by number. In the centre of the page are six options: Submit for Funding, Submit Report to Ministry, See My Payments, See My Funding History, See My Repayments, and Manage My Contracts.

On the "I am looking to" page, select the "Manage My Contracts" menu card.

There are two tabs, Contracts Pending Approval, and Approved Contracts. This page shows Step 1: See Contract Information; Step 2- Download Contract Document and Supporting Documents sections.

Contracts where review and approval are required, are located in the Contracts Pending Approval tab.

The hand points to Contracts Pending Approval tab.

In Step 1, select the contract you would like to review and approve. Use the horizontal scroll bar to view additional fields. In Step 2, select the hyperlink to download the contract. If the contract has supporting documents, you can download them from the Supporting Documents section.

The hand selects Sample Contract hyperlink in Step 2.

A popup confirms your action, showing Download and Cancel buttons.

Select the Download button. You may need to deactivate your pop-up blocker, to allow downloading. Contract documents may appear in PDF or Rich Text Format, depending on the Ministry's requirements.

A sample contract/ agreement is displayed in an Adobe PDF reader screen.

Here, the contract file is a PDF document. Review the agreement. Once reviewed, return to the Manage My Contract page in Transfer Payment Ontario.

From the Contracts Pending Approval tab, scroll to the bottom.

The hand scrolls down.

If Step 2a appears, the Ministry requires a signed copy of the contract. Download and sign the contract. Attach the signed contract by selecting "New File".

The hand indicates Step 3

At Step 3, you approve the contract electronically. You can add comments, and here you can Approve or Return the contract to the Ministry. If you decide not to approve, select "Return Contract".

The hand selects Return Contract.

A pop-up alert will appear. Select OK to return the contract or select Cancel.

The hand selects Cancel.

You can select the information icon to review the list of approvers.

The hand selects the "i" book icon next to return record.

The pop-up displays the approvers for the contract, and the status and sequence of their approval. Select the X to return to the previous page.

The hand selects X to exit the pop-up box

To approve the contract, select the checkbox to the left of the declaration which states: "I have read, understand and agree to the terms and conditions of this Transfer Payment Agreement (including the Schedules) in the step 2 above and have authority to bind the Recipient."

The hand selects the check box.

The Approve button will become enabled. Select the Approve button.

The hand selects approve.

The message appears, "Your approval of the contract has been successfully completed". Select OK.

The hand selects OK.

Contracts approved by your organization and the Ministry, will be displayed under the Approved Contracts tab.

The hand points to Approved Contracts.

At the top, you can review details of the Approved Contract,

The hand points to Step 1.

...or download a copy of the contract, here.

The hand points to step 2.

In this video, you learned how to Manage My Contracts Review Contracts Approve Contracts. Thank you for watching.

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