Registering an organization

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Document summary

This document outlines how to register a new organization in Transfer Payment Ontario.

Before you begin

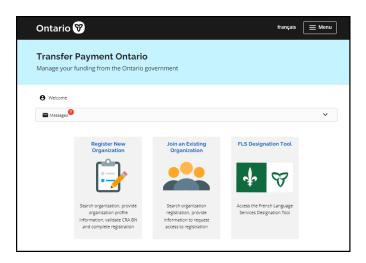
To register your organization will need:

- your Canada Revenue Agency Business Number (CRA BN), if you have one (if you do not have a CRA BN you will need to confirm this by completing the CRA Program Account Checklist as part of your registration process.)
- the **legal name of your organization** that's printed on official documents (for example, articles of incorporation or registered business applications)

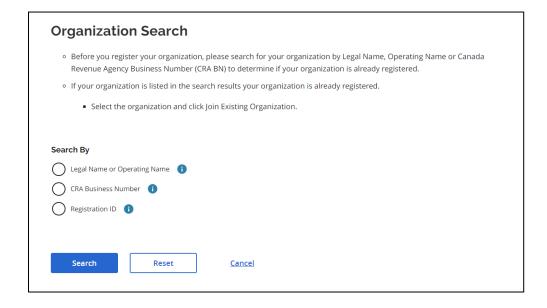
- the operating name of your organization (your business name commonly used by your clients)
- contact information for at least two contacts within the organization, including one senior contact with signing authority (for example, a director, controller or CEO and another member of your organization)

Registering an organization

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



2. Select **Register New Organization**. If the card is not on the home page, select your **Menu** and select **Register New Organization**.



- Enter your organization's Legal Name or Operating Name, CRA Business Number, or Registration ID.
- 4. Select Search.

Note: If the error message "Search results too large. Please refine your search." appears, please perform a new search with refined keywords or information. Select **Search** again.

- If your organization appears in the search results list, then it is registered. Please do not register your organization again. Joining instructions are available on ontario.ca/GetFunding.
- If your organization does not appear in the list, it must be registered.



5. Select Click here to register.

Step 1: Organization profile

1. Complete the fields on the page.

Organization Profile

This page provides an Organization's Profile information. A registration will remain in draft or submitted status until a Canada Revenue Agency Business Number (CRA BN) has been provided and validated.

For further information on the CRA BN, please refer to the Canada Revenue Agency website.

If you do not have Administrator responsibilities, you cannot update your organization profile. Please contact the Admin User within your organization for further assistance. You can find the person(s) in your organization with an Admin User role by navigating to Organization Users.

Transfer payment recipients must submit the attestation as part of the selection process prior to entering into new agreements, renewed agreements, or amended agreements for new time-limited and ongoing discretionary funding, unless an attestation has been submitted to the Province within the last year. The Tax Compliance Verification check must be completed and a Tax Compliance Verification number must be provided within the attestation on Transfer Payment Ontario. Please see attestation section for more details

2. Select Save and Continue.

Sub-organizations

A sub-organization is an organization that shares the same legal name and CRA Business Number as another organization but operates under a separate operating name and address.

1. Select the I am registering a sub-organization checkbox.



- 2. Scroll down then enter the Parent Organization CRA Business Number.
- 3. Select **Search**. If the CRA business number is found, some fields are automatically completed.
- 4. Complete the remaining fields on the page.
- 5. Select Save and Continue.

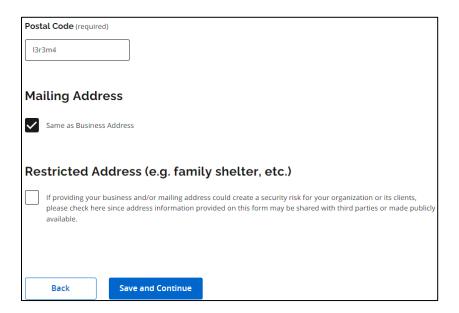
Step 2: Address

1. Enter the business address.



Note: As you start typing the address in **Address Line 1**, the system offers a selection of suggested addresses. Select the correct address from the list and the system will automatically fill out the remain address fields.

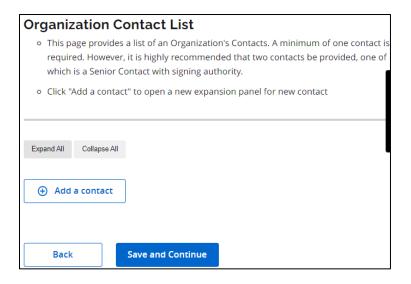
2. Complete all remaining address information.



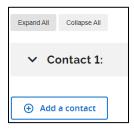
3. Select Save and Continue.

Step 3: Contacts

1. Select **+Add a contact**. The screen expands.



2. Select the dropdown menu or select Expand All.



- 3. Complete all required fields.
 - a. Country code: Enter 1 for Canada.
 - b. **Signing Authority**: If this is selected, the contact will have Transfer Payment Ontario contract signing authority.
- 4. Repeat for each additional contact.
- 5. Select Save and Continue.

Step 4: Attestation and Tax compliance verification (TCV)

Applicable organizations may be required to complete an attestation of compliance and Tax Compliance Verification (TCV). Organizations will attest to being in good standing with labour, environment and tax laws in order to receive certain types of transfer payment funds from the Province of Ontario (the Province).

An attestation of compliance and TCV is required before entering into a new, renewed, or amended transfer payment agreement if:

- Your organization received \$10 million or more in cumulative transfer payment funding from the Province in the previous fiscal year (April–March); or
- The new, renewed or amended agreement's value is \$10 million or more in any year.

An attestation of compliance and TCV is not required if any of the following apply:

- Your organization is an Indigenous Entity/Transfer Payment Recipient; or
- The funding is required by legislation or law; or
- The funding ministry indicates that it is not required.

Attestation of compliance and TCV are only valid for one-year. Ensure your attestation is current before entering into a new, renewed or amended agreement.

Organizations are strongly encouraged to update their attestation of compliance and TCV annually.

Check with the funding ministry if you have questions about the requirements.

Organizations may choose to complete and submit the attestation of compliance and provide TCV voluntarily.

Completing the Attestation of Compliance:

1. Complete the attestation in your organization's profile on TPON.

Completing the Tax Compliance Verification:

- 1. Obtain a TCV certificate by using the TCV online service
- 2. Provide the Tax Compliance Verification number and issue date in your organization's profile on TPON.

Attestation of Compliance and Tax Compliance Verification



An Attestation of Compliance and Tax Compliance Verification may be required for your organization. Would you like to complete it now?

Yes

No - not required to complete it

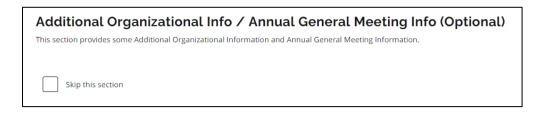
No - would like to complete later

3. Select Save and Continue.

Step 5: Annual general meeting (AGM)

In the AGM section, you can enter additional organization information and details about the annual general meeting.

1. Complete the information or select the **Skip this section** checkbox, if applicable.



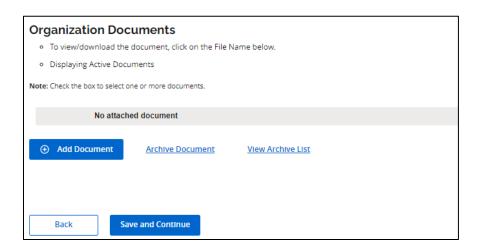
2. Select Save and Continue.

Step 6: Documents

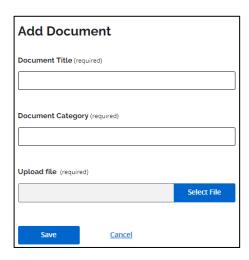
In this step, organization documents including information about the organization's Audited Financial Statements (AFS) are uploaded. Documents attached to the organization profile are automatically included with your submissions.

Documents that are no longer relevant can be archived by selecting **Archive Document**. Archived documents can be restored from the **View Archive List**.

1. Select +Add Document.



2. Complete the title and document category.



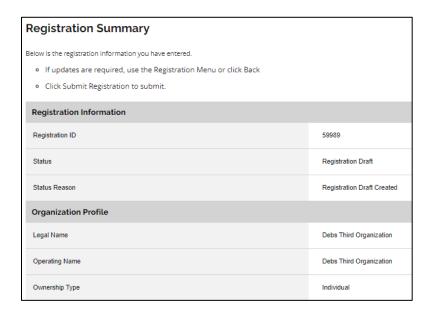
- 3. Select File.
- 4. Select the file from your device and select **Open**.
- 5. Select **Save.** A confirmation message appears.



- 6. Select Confirm.
- 7. Repeat for each additional document.
- 8. Select Save and Continue.

Step 7: Review and submit

1. Review the information.

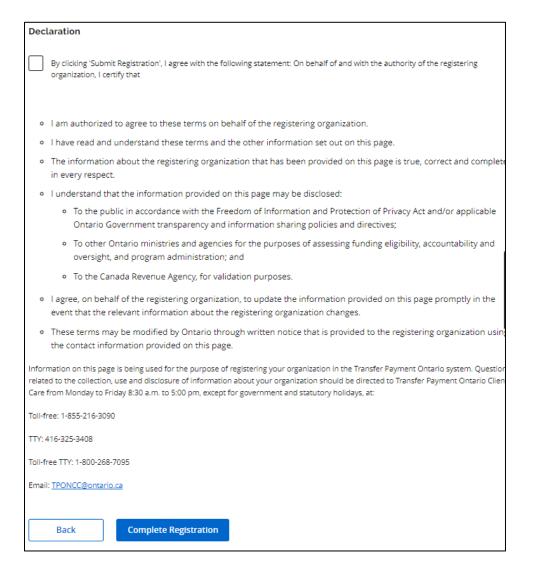


- a. If edits are required, navigate to the section to be edited.
- b. To download a PDF version of the registration summary, select **Submission Summary (PDF).**

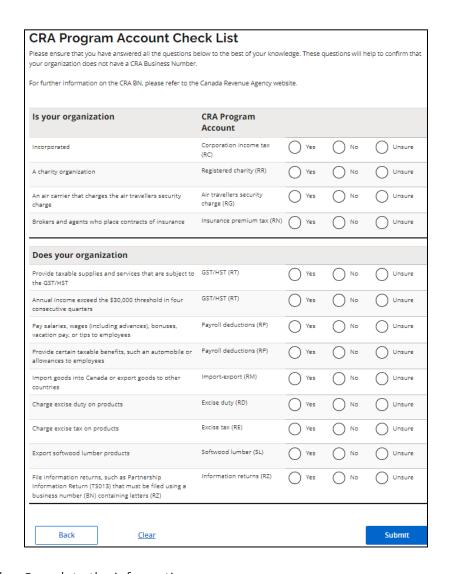
Download a copy

<u>Submission summary (PDF)</u>

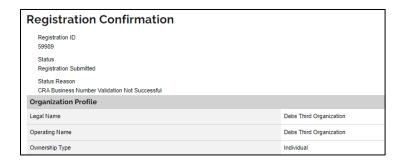
2. Scroll down to **Declaration**.



- 3. If everything is correct, read the declaration then select the checkbox.
- 4. Select Complete Registration.
 - a. If you indicated "No" to having a CRA BN in the step 1 **Organizational Profile** of the registration, you must complete the **CRA Program Account Check list**.



- b. Complete the information.
- c. Select Submit.
- 5. A **Registration Confirmation** page appears.



- 6. If you want to print a copy of the confirmation, select the Submission summary (PDF) link.
- 7. Select Done.

Types of user roles

There are two types of users in Transfer Payment Ontario: **Administrator** and **Associate**. Both roles have access to the organization information in Transfer Payment Ontario, but do not share the same rights to modify or add organization information.

Administrator user

An administrator user can:

- view and update the organization profile
- approve access requests for new organization users
- perform funding-related activities

Note: If your Transfer Payment Ontario administrator leaves their role, you can request a new administrator. Send an email to TPONCC@ontario.ca, and copy another member of your organization for authentication/identification purposes. Transfer Payment Ontario will update the administrator information as required.

Associate user

An associate user can:

- view as read-only the organization profile
- perform funding-related activities

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.