

Updating an organization

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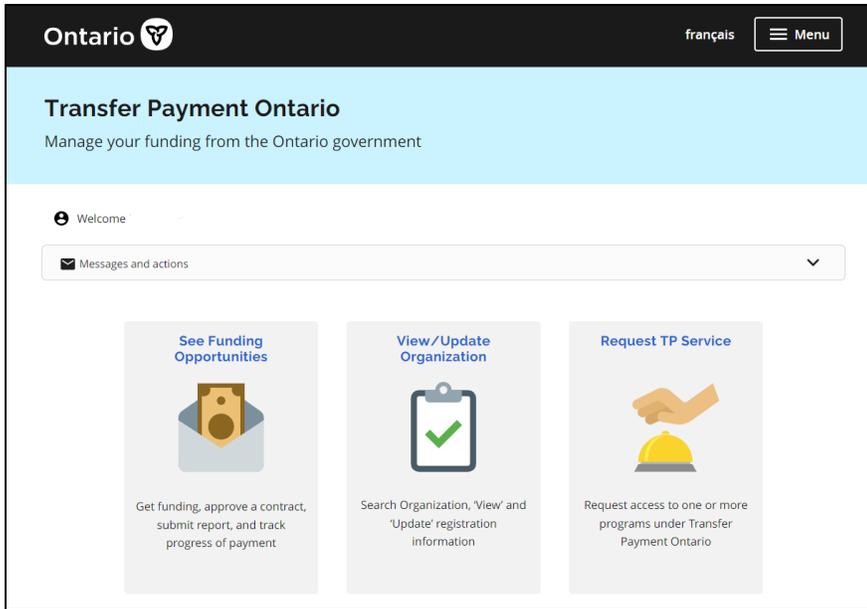
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Document summary

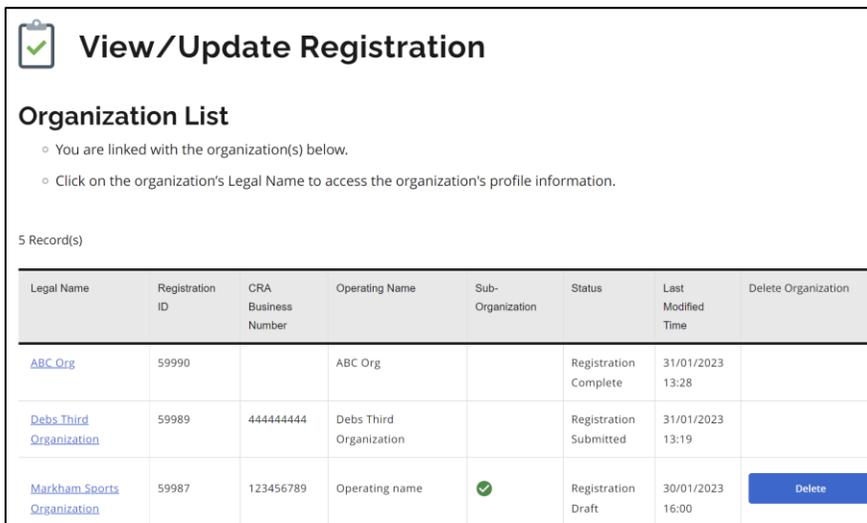
This document outlines how you can view or update your organization information, users, and sub-organizations.

Viewing organization details

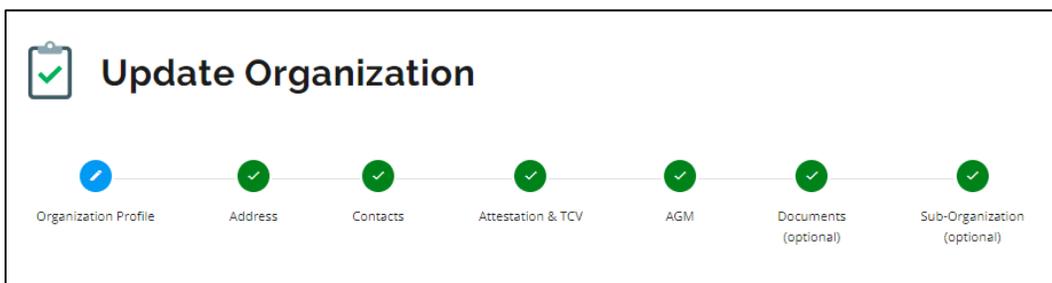
1. Sign in to Transfer Payment Ontario using a Google Chrome web browser.
2. Select **View/Update Organization**.



3. Select the **Legal Name** of the organization.



4. Select the tab you want to view or update.



Step 1: Updating the organization profile

Organization administrators can update the organization's profile and information. Associate users have read-only access to the profile information.

1. Select the **Organization Profile** tab.

Essential Information

Legal Name (required) ⓘ

Operating Name (required) ⓘ

Same as legal name

Ownership Type (required) ⓘ

Organizational Type (required)

My organization is a registered charity

My organization is a not for profit organization ⓘ

Company Website (optional)

2. Make changes if required.
3. Select **Save**.

Note: Some fields are read-only and cannot be edited. Read-only fields appear with a grey background.

Step 2: Updating the address

1. Select the **Address** tab.

Business Address

Address Line 1 (required)
575 yonge st

Address Line 2 (optional)

City (required)
toronto

Province (required)
ON

Postal Code (required)
M5S 1A5

Mailing Address

Same as Business Address

Restricted Address (e.g. family shelter, etc.)

If providing your business and/or mailing address could create a security risk for your organization or its clients, please check here since address information provided on this form may be shared with third parties or made publicly available.

[Back](#) [Save](#)

2. Make changes if required.
3. Select **Save**.

Step 3: Updating the contacts

Organization administrators can update the organization's contacts. Associate users have read-only access to the contact information.

1. Select the **Contacts** tab.

Organization Contact List

- This page provides a list of an Organization's Contacts. A minimum of one contact is required. However, it is highly recommended that two contacts be provided, one of which is a Senior Contact with signing authority.
- Click "Add a contact" to open a new expansion panel for new contact

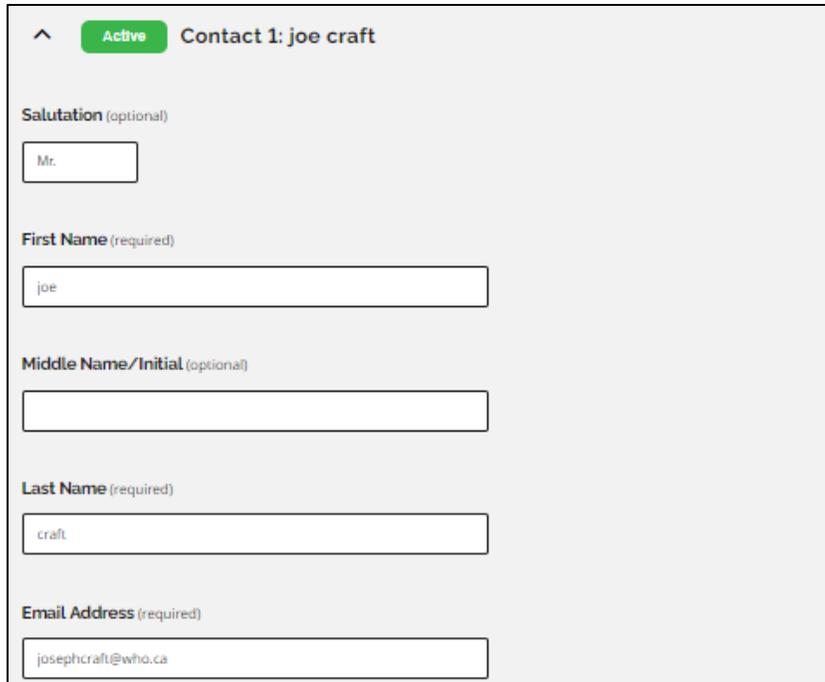
[Expand All](#) [Collapse All](#)

▼ **Active** Contact 1: joe craft

[Add a contact](#)

[Back](#) [Save](#)

2. Select the contact's name.



^ **Active** Contact 1: joe craft

Salutation (optional)

First Name (required)

Middle Name/Initial (optional)

Last Name (required)

Email Address (required)

3. Make changes if required.
 - a. **Signing Authority:** If this is selected, the contact will have Transfer Payment Ontario contract signing authority.
4. Select **Save**.

Removing a contact

1. Open the contact.
2. Change the **Status** field to **Inactive**.



Status (required)

Active

Inactive

3. Select **Save**. Once the change is saved, the inactivated user receives a notification that their information has been updated.

Note: A minimum of one contact is required.

Step 4: Updating 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

i IMPORTANT NOTICE:

Your organization may be required to submit an Attestation of Compliance and Tax Compliance Verification. Please review the [Requirements for Attestation of Compliance and Tax Compliance Verification](#) for additional information and contact your funding ministry if you have questions.

Attestation of Compliance and Tax Compliance Verification 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 Tax Compliance Verification annually.

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

- Yes
- No - not required to complete it
- No - would like to complete later

3. Select **Save and Continue**.

Step 5: Updating the annual general meeting (AGM)

1. Select the **AGM** tab.

Additional Organizational Info / Annual General Meeting Info (Optional)

This section provides some Additional Organizational Information and Annual General Meeting Information.

Skip this section

2. Make changes if required.
3. Select **Save**.

Step 6: Updating the documents

1. Select the **Documents** tab.

Organization Documents

- To view/download the document, click on the File Name below.
- Displaying Active Documents

Note: Check the box to select one or more documents.

Document Title	Document Category	File Name	Uploaded By	Date/Time
<input type="checkbox"/> Bylaws	By-Laws	TPON-University.pdf	Craft, Joseph	23/01/2023 13:39
<input type="checkbox"/> Certificate of Insurance	Certificate Of Insurance	Certificate of Insurance.pdf	Craft, Joseph	23/05/2022 10:05

[+ Add Document](#) [Archive Document](#) [View Archive List](#)

Adding a document

1. Select **+Add Document**.

Add Document

Document Title (required)

Document Category (required)

Upload file (required)

 [Select File](#)

[Save](#) [Cancel](#)

2. Complete the title and document category.
3. Select **Select File**.
4. Select the file from your device and select **Open**.
5. Select **Save**. A confirmation message appears.

Document Details

Document Title*
By-laws

Document Category*
By-Laws

File Name*
Debs Contract.RTF

[Confirm](#)

6. Select **Confirm**.

Note: Documents attached to the organization profile are automatically included with your submissions. Documents that are no longer applicable can be archived.

Viewing a document

1. Select the **File Name**.
2. The file is downloaded to your device to review.

Archiving a document

1. Select the checkbox of the document(s) you want to archive.
2. Select **Archive Document**.
3. The document is removed from the **Organization Documents** list.

Viewing an archived document

1. Select **View Archive List**. The list of archived documents appears.

Organization Documents				
<ul style="list-style-type: none"> ◦ To view/download the document, click on the File Name below. ◦ Displaying Archived Documents <p>Note: Check the box to select one or more documents.</p>				
Document Title	Document Category	File Name	Uploaded By	Date/Time
<input type="checkbox"/> Financial Statements	Audited Financial Statements	Financial Statements.pdf	Craft, Joseph	18/03/2021 09:35
<input type="checkbox"/> Articles of Incorporation	Articles Of Incorporation	Articles of Incorporation.pdf	Craft, Joseph	18/03/2021 10:08
<input type="checkbox"/> By-laws	By-Laws	Debs Contract.RTF	Craft, Joseph	24/01/2023 09:25
Back to Organization Documents			Restore Document	

2. Select the **File Name**.
3. The file is downloaded to your device for review.

Restoring an archived document

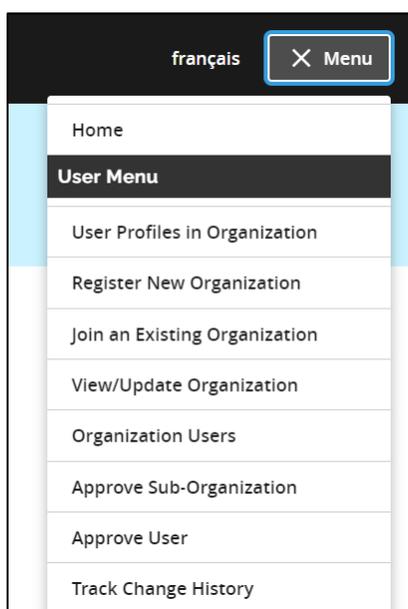
1. Select checkbox of the document(s) you want to restore.
2. Select **Restore Document**.
3. Select **Back to Organization Documents**.
4. The documents are now restored.

Managing organization users

Approving an organization user

Organization administrators will receive email notification when new users request to join the organization. Requests can be approved or denied in Transfer Payment Ontario.

1. Sign in to Transfer Payment Ontario using a Google Chrome web browser.
2. Select the **Menu** and **Approve User** menu option.



3. The table shows the history of requests. The **Request Status** column will show if the user is requested (pending), approved, or denied.

Access Requests List			
Click on the Name to approve or deny the sub-organization join request(s).			
Name	Organization Operating Name	Request Status	Request Date
Kepner, April	Kerr Auto Shop	Approved	29/09/2021 09:12
Thomas, Jimmy	Kerr Auto Shop	Denied	11/05/2021 09:06

4. Select the requestor's name to review their request and information.
5. If the request is pending, select **Approve** or **Deny**.

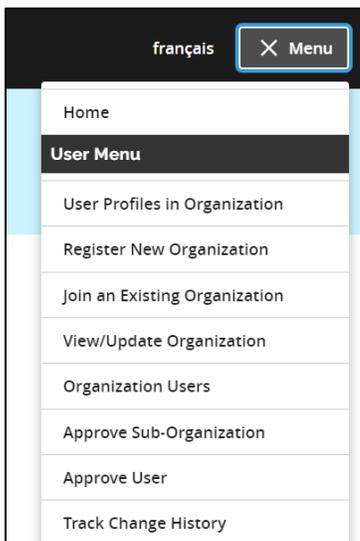


6. The requestor will receive confirmation of their request.

Removing an organization user

Organization administrators can deactivate users to remove organization access in Transfer Payment Ontario.

1. Sign in to Transfer Payment Ontario using a Google Chrome web browser.
2. Select the **Menu** and **Organization Users** menu option.



3. Choose your organization from the **Operating Name** dropdown menu.



4. The table shows the history of users. The **Profile Status** column will show if the user is active or inactive in the organization.

Profile Status
Active
Inactive

5. Select the user's name to review their profile.
6. Under **Profile Information**, select the **Profile Status** dropdown menu to update the status.

Profile Information
Profile Role Associate... ▾
User Type ▾
Profile Status Inactive ▾

7. Select **Save** to update their access.

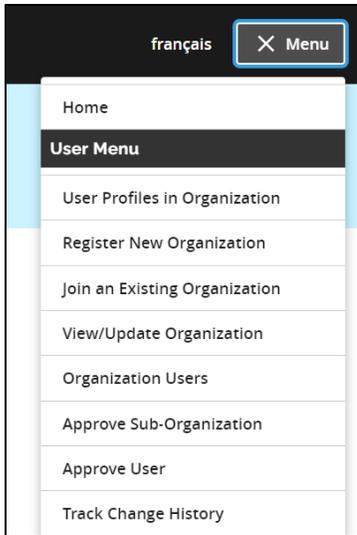
Managing sub-organizations

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

Approving a sub-organization

Organization administrators can approve or deny requests for sub-organizations in Transfer Payment Ontario.

1. Sign in to Transfer Payment Ontario using a Google Chrome web browser.
2. Select the **Menu** and **Approve Sub-Organization** menu option.



- The table shows the history of sub-organization requests. The **Request Status** column will show if the sub-organization is requested (pending), approved, or denied.

Li, David	Subjan	Requested	31/01/2023 14:54
Lynch, Brendan	ABCO Sub-Org 2	Approved	01/12/2022 11:28

- Select the requestor’s name to review their request and sub-organization information.
- If the request is pending, select **Approve** or **Deny**.



- The requestor will receive confirmation of their request.

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.