Transfer Payment Ontario

Text-Only Format: How to Submit a Budget Form

Welcome to Transfer Payment Ontario: How to submit a Budget Form.

> **Description:** There is a decorative compass on the title page.

For an optimal learning experience and best performance of this eLearning,

Turn your audio on.

Please note: There is a text-only version of this video to meet the standards of the Accessibility for Ontarians with Disabilities Act (AODA), however if it is not suitable to meet your needs, do not hesitate to contact: TPONCC@ontario.ca.

As the system is occasionally updated, its look may change over time, however, the instructions are still valid,

> **Description**: The sound icon is in the system task bar.

In this video, you will learn how to:

1. Log in to Transfer Payment Ontario
2. View your MCCSS Allocation Details
3. Submit an MCCSS Budget Form
4. and track your submission.

> **Description:** There is a decorative compass behind the learning objectives list.

Transfer Payment Ontario provides you with one-window access to the Government of Ontario's funding opportunities.

You can use the system to apply for funding, track your funding submissions, submit reports, view payments and more.

To access our webpage, enter the URL [http://ontario.ca/getfunding] into your browser.

Please ensure to use Google Chrome

Navigate our webpage for instructions, resources and contact information.

Select the “Log In” button to access Transfer Payment Ontario.

> **Description:** The website URL is entered, and the browser navigates to a webpage titled "Get funding from the Ontario government”. Below the title contains a description and a login button. The description reads “Find out what funding your organization could receive from the Ontario Government and learn how to register with Transfer Payments Ontario.” The login button reads “Log into Transfer Payments Ontario”. Further down the page contains hyperlinks to 1.

Overview, 2. Register for Transfer Payments Ontario, 3. Available Funding, 4. Get Help, and 5. Contact Us.

Sign up and 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.

Description: Boxes appear on the screen to emphasize each field mentioned. The mouse moves to select the ONe-key Sign In button. The text on the page reads: Transfer Payment Ontario. Log in with your ONe-key ID. A One-key account gives you secure access to Government programs and services. Learn More. Don't have a ONe-key ID? Register now! Or sign in with GO-Secure. GO Secure is used specifically by individuals in the Ontario Government and the broader public sector.

If you are signing up for the first time, create your Transfer Payment Ontario account.

Complete all mandatory fields and select Submit.

Description: A Transfer Payment Account creation page appears. The First Name, Last Name and Email Address fields are marked with asterisks indicating that they are mandatory. The Invitation Number field is not mandatory.

To submit for funding, you will need to either register a new organization, or join an organization that's already been registered.

Instructions for both these options are on the Transfer Payment Ontario website.

Description: Two menu icons are displayed with the labels "Register New Organization and “Join Organization”.

Once you have registered or joined an organization, you can view or update its information, request access for additional sub-organizations if needed, or see funding opportunities.

It's important that your organization details are accurate. Some of the details are pre-populated in the Budget Form, so review all information here first.

Now, let's have a look at MCCSS funding opportunities!

Description: Three menu icons are displayed with the labels: View/Update an organization, Request TPO Service, and See Funding Opportunities. The mouse selects the “See Funding Opportunities” option.

From the "I am looking to" page, here are the things you can do. There are navigational tools in the top-right corner. Each has a tool tip that says what it does.

Let's have a closer look.

Return to the home page, Return to this menu page (I am looking to:), Communications, A Chat Bot where you can ask questions any time, Contact information for more help, user profile menu, and a log out button.

Description: This page is titled "I'm looking to". The name of the user and organization are displayed on the right-hand side column. Below are links to recently viewed case numbers. There are six menu cards displayed at center of the page: Submit for Funding, Submit Report to Ministry, See My Payments, View My Funding History, See My Refunds, and Manage My Contracts.

Now, lets find an MCCSS funding opportunity and submit for funding.

MCCSS Funding opportunities for which your organization is eligible to apply are located in the Invitational Programs tab.

Description: The system navigates to the Submit for Funding Page, Invitational Programs for My Organization tab. Next to this tab is a second tab labelled “Open Programs”. On the right-hand side is a “List” button to change the page to list view and on the bottom is a down arrow to expand the view. The “MCCSS Budget Package 2020-21” program menu card is displayed at the center of the page.

Programs are displayed like cards or in a list format. To submit for funding, select the hyperlinked name of a program.

New submissions begin on the first of four steps in Step 1: Review Program Information.

Your submission is described on the right. The unique case number is especially important for referencing and tracking your submission.

Review all the program related documents available for download. To download a Program Document, select its hyperlinked document name.

Description: The page is titled "Submit for Funding" and underneath it is the name of the program. Further below are the four steps of the application labelled by numbers: Step 1. Review Program information, Step 2. Complete Form, Step 3. Attach Supporting Documents, Step 4. Confirm Submission. A table displays list of documents with the Name and Comments along with a help box labelled “"Problems Downloading?" On the right-hand side of the page is a column displaying the case information including the Program, Case Number, Date Created, Status, and Submission Deadline.

Near the bottom of the page is a list of the that you may be required to attach as part of your submission. Review mandatory and optional requirements.

When you've finished reviewing everything, select Next.

Description: A table is displayed listing several attachment types table. The text above the table reads: “Below is a list of documents you may be required to attach as part of your submission. Note that each attachment is identified as either mandatory or optional. Please refer to the program documentation above to learn how to properly complete this requirement of the submission.”

Step 2 is to download and complete the budget form. We recommend using Adobe Acrobat Reader DC and disabling your browser pop-up blocker to download the form.

For most MCCSS programs, you will also find component, region and notional allocation details in this step. Review this information prior to downloading the form. If you have any questions about the information displayed, contact your Ministry representative.

We've included troubleshooting tips for downloading the form here. If you do not have Adobe Reader, use the link to find and install the free version of Adobe Reader.

Select the Download Form button.

> **Description:** Underneath the “Step – 2 Complete Form” heading is a three-column table displaying the Components, their Region / Branch, and the 2020-21 Notional Allocation for the component. Further below is the “Download Form” button along with a recommendation note to the user to use Adobe Acrobat Reader DC to complete the form. A link to download Adobe Reader is embedded in the note. Below the Download Form button are troubleshooting tips under the heading “Problems downloading”?

A pop-up window appears. Select Download.

Note that the Budget Form download may take several minutes to download depending on the number of program components included in the form.

Once the form is downloaded, find it in your Downloads folder, right-click it and open with Adobe Reader. The default reader in your web browser will not allow you to complete the form properly. Download and install Adobe Reader if it isn't displayed in this list. Adobe Reader is available online and it's free.

> **Description:** A file explorer appears with the Downloads folder open, the form has been right-clicked, Open With… selected, and Adobe Reader ready to be selected.

You do not need to be logged in to the Transfer Payment Ontario system to complete the downloaded form. You and your colleagues can work on your application from anywhere.

Share the file with others if needed and save the form regularly.

You can navigate to any section quickly using the top navigation links.

If any details in the organization information sections are wrong on the form, delete the form, fix them from the Home page after selecting View/Update Organization, and download the form again.

Select the Expand button to view and complete all sections of the form.

Once you have completed all sections of the form, select the Validate button. If all the mandatory fields are completed, the form will validate successfully.

Description: The form displays the program name MCCSS Budget Package 2020-21, and case number at the top followed by a table of links to the 9 sections. Section A shows detailed instructions, and the remaining sections are not shown.

Anything that's missing is reported here. Add the missing information and validate the form again.

When validation is successful, save the form on your local computer. Do not scan the forms. The signatures are also completed electronically.

Description: A dialogue box appears saying validation completed successfully. Behind it, it appears the form is on the last section and is completed.

Take note of your unique case number located at the top corner of the form. Once your form has been validated and saved, return to the Transfer Payment Ontario system.

Description: The case number is highlighted on the top right corner of the form.

Log in to Transfer Payment Ontario using your ONe-key ID.

Select the See Funding Opportunities menu card.

For quick access, select your case number from the Recently Viewed... or go to the See My Funding History menu card to locate your case from a list of your organization's cases.

[The mouse selects each item.]

Description: Images of the pages and selections appear.

The system will return to the submission steps. Return to the Step 2: Complete Form.

Description: Step 1 is not displayed again in the video. The mouse moves to select Step 2. The Submit for Funding page appears on Step 2.

Scroll down and select the Upload Form button.

Description: The last section of the Step 2 page is labeled “Upload Your Completed Form”. The Upload button is fund in this section along with detailed instructions on how to upload. At the bottom is a tips box labelled “Problems Uploading?”

To upload the form, select the look-up icon in the File Name field.

Description: The Step 2 page now displays the File Name and Comments fields.

Select “Choose a file.”

Description: A pop-up window labeled “Add Attachment” appears with the sub-text "Please specify a File Name or URL".

Locate the saved Application Form on your computer and select open.

Description: Description: A browser window displays the computer's local files in with Open and Cancel buttons.

Select Upload, and if there are any problems, review the tip box below.

After upload is complete, the system will redirect you to Step 3.

Description: At the bottom of the Step 2 page, the File Name field contains the name if the selected document. Further down the page is the "Problems Uploading" section containing tips on uploading the form.

Step 3 is for attaching supporting documents. These were mentioned in Step 1, and they are listed here again. When you've prepared attachments to upload, scroll down.

Description: The Step 3 page is titled "Attach Supporting Documents". The Review Supporting Attachments section contains instructions and a table of attachment types. Below that is the Upload Support Attachments section.

Select "New" and locate the attachment on your computer as you did for the application.

Description: The middle of Step 3 shows the "Upload Supporting Attachments" section along with instructions and a table of documents already uploaded. Further down is the "Review Organization Attachments" section. At the bottom of the page are the Next and Back buttons. Uploading is not shown.

Once the attachment is located, select Open.

For each upload, record the Attachment Type. Select the Attachment Type field. The look-up icon appears. Select the icon.

Description: The table of documents shows a new line containing the file uploaded with the Attachment Type field blank.

In the pop-up window, select which type of attachment this is, then select OK.

To save your entry, select outside the active box outlined in red, or press Control + S on your keyboard.

Here we've attached a Certificate of Insurance.

Near the bottom of the page, is a list of any documents attached to your organization profile.

You can modify them from the Home page after selecting View/Update Organization.

Select Next to continue to the final step.

Description: The bottom of the Step 3 page shows the Review Organization Attachments section with instructions and a table to display the attachments.

Step 4 is the final step where you confirm the submission is complete.

If any attachments were missed, a warning or error message will appear.

When you've met all the requirements, select the Complete Submission button.

> **Description:** Step 4 contains instructions on submission and the "Complete Submission" button. The Program, Case, Date Created, Status and Submission Deadline is displayed in a box on the righthand side. The status is currently in Draft. Further down the page is the "Problems submitting" section containing tips on submitting the form.

A confirmation message appears. Note the status of your submission updates to Submitted.

No other changes can be made once the status changes to submitted, however, you can attach additional documents to your case as needed.

If you need to make edits to a submitted form, contact your Ministry Representative.

To track your submission, return to the "I am Looking to" page, either from the tools at the top, or the Back to Home button.

Then select the See My Funding History menu card.

> **Description:** This is the "I am looking to" page. When last visited we selected Submit for Funding. The user's Name and the Organization Name are displayed on the right-hand side, and underneath on the right are links to recently viewed cases by case 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 Approve My Contracts.

Your organization's cases, including submissions and drafts are listed in this table.

If the Ministry requires additional information on your submitted case, the Resubmission Required column will be flagged and you will be able to edit and resubmit the budget form.

To open a case, select the Case number.

> **Description:** The first section of the See My Funding History page is My Organization's Cases, followed by a table with columns: New, Case Number, Program, Status, and Opened Date. A query tool is on the top-right, and navigation links are underneath.

You can track your submission, review program documentation, view and add attachments and create assistance requests with our help desk

> **Description:** The See My Funding History page now shows 6-part tracker where the progress is indicated by darkening a part. The parts are Received, Review, Approval, Contract, Monitor, and Closed. Below that attachments are listed in a table with New and Query tools on its top right. Below that is a table for assistance requests, also with two tools on its top right: Create Assistance Request and Query. On the right side of the page is the section that reports the submission's program, case, date created, and date closed.

The Transfer Payment Ontario Branch offers technical support to its users.

Help is available in both English and French via several channels.

You can e-mail us at tponcc@ontario.ca. Our e-mail boxes are monitored Monday to Friday 8:30am to 5:00pm EST.

Our phone number is 416-325-6691 and the lines are open Monday to Friday 8:30 am to 5:00 pm EST.

> **Description:** Decorative image of a customer service agent with contact information for Transfer Payment Ontario

Thank you for completing this video.

> **Description:** An image of a decorative compass is behind the listed items.