

OBR Partner Portal Onboarding Guide for Intermediary Users

Version 5.0

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For Assistance

For inquiries or problems, please contact ServiceOntario at:

Tel: 416-314-8880

Toll-free: 1-800-361-3223

TTY: 416-325-3408

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

Table of Contents

- Overview..... 3**
 - What is the Partner Portal and who should use it? 3
 - Who is an Intermediary?..... 3
 - Purpose of this guide..... 3
 - Glossary of Terms..... 4
- Part 1 - Onboarding to the Partner Portal..... 6**
 - Fill and submit the Intake Access form..... 6
 - Receive an Activation Code 8
 - My Ontario Account Login..... 8
 - Multi-Factor Authentication 10
 - Redeem the Activation Code 12
 - Start using the Partner Portal 12
- Part 2 - Adding/Modifying/Deleting Users from Intermediary Organizations..... 13**
 - Adding a User/Admin User 13
 - Modifying an Admin User's Profile 13
 - Modifying and Deleting an Organization User's Profile..... 13
 - Delete an Organization User 13
 - Resending Activation Code..... 14
 - Modifying an Intermediary Organization's Profile..... 14
- Part 3 - Claiming Authority of an Entity or Corporation as an Intermediary..... 14**
 - Steps for an Intermediary to Claim Authority using their Client's Company Key ... 15
- Part 4 - Navigating the Partner Portal Dashboard..... 18**
 - Services..... 20
 - The Noticeboard..... 21
 - Intermediary Organization Details..... 21
 - Logging out of the Partner Portal 25
 - Useful Weblinks 26

Overview

What is the Partner Portal and who should use it?

The Ontario Business Registry (OBR) allows businesses, Corporations and Not-for-Profit Corporations to complete more than 90 transactions online, 24/7, 365 days of the year. Key services include business registrations, incorporations, company name searches, and self-serve information updates.

The OBR's Partner Portal is a direct government gateway and solution designed for intermediary organizations to complete transactions in the OBR on behalf of their clients. The portal is a new service channel that will allow intermediaries to conduct transactions that were previously exclusive to service providers.

Mail-in and service provider options remain available to intermediaries to complete filings on behalf of companies. Qualified intermediaries may also file by email on behalf of organizations.

Who is an Intermediary?

An intermediary is any entity having authority to act, as agent or otherwise, on behalf of their authorized client(s) in conducting transactions within the Ontario Business Registry. Examples of an intermediary include lawyers, paralegals, accountants, small business consultants, and officers of financial institutions, search houses or Service Provider organizations.

Purpose of this guide

This guide is intended to support intermediaries to access and use the OBR Partner Portal on behalf of their respective business clients. In general, it provides information about accessing the Partner Portal, adding users, claiming authority of business profiles, and navigating its functions. This guide is not intended for fee-exempt users of the portal. Those users should seek guidance through established service channels.

Glossary of Terms

Activation code: An 18-digit activation code issued during the set-up of a new user account. The activation code can only be used once (during the first-time login to the Partner Portal) and is valid for 30 days from the day an organization account is created in the OBR. Once set-up is complete, users no longer need to rely on this code to continue accessing the system.

Administrator user: An administrator user (or admin user) of an intermediary organization is responsible for the user management of individuals within the organization. For example, if a new employee joins the organization and requires access to Partner Portal, the identified admin user is responsible for granting access to the new user and/or modifying their account.

An organization can have more than one admin user. An organization's existing admin user can add additional admin users to the account. To do so, the admin user would select the "Admin user" checkbox in the system when adding the new user.

Authorization code: A numeric code that is generated when a business owner grants authority to an intermediary via their ServiceOntario account. The intermediary would enter the authorization code into Partner Portal to complete the process of obtaining delegated authority of the entity.

Business owner: A sole proprietor, corporation or other entity registered in the Ontario Business Registry. These may not be "owners" in the legal sense.

Company Key: A system generated 9-character number (e.g., 123456789) similar to a Personal Identification Number (PIN) that an individual uses at the bank or to access other online accounts or services. It is generated for all entity types in the Ontario Business Registry and is used when you log into the system to give you the authority to make changes to the information on record with the Ministry.

Delegated authority: Means the authority given to an organization that is making filings for an entity on behalf of the business owner.

Executive authority: The authority given to the sole proprietor, corporation, or other entity to gain access to and maintain authority over its OBR profile. Executive

authority has additional features such as grant authority, revoke access, and regenerating Company Key. Delegated authority does not have access to these functions.

My Ontario Account: The Government of Ontario is changing the way the public accesses online government services, including the Partner Portal. As of June 2023, the Partner Portal has switched from using GO Secure to the new My Ontario Account. My Ontario Account allows for increased security and authentication, while providing an improved experience to users.

Intermediary: An entity having authority to act, as agent or otherwise, on behalf of their authorized client(s) in conducting transactions within the Ontario Business Registry. Examples of an intermediary include lawyers, paralegals, accountants, small business consultants, and officers of financial institutions, search houses or Service Provider organizations.

Organization: A sole proprietor, corporation or other entity registered in the Ontario Business Registry.

Part 1 - Onboarding to the Partner Portal

To get access to the Partner Portal you will need to:

1. Fill and submit the [Intake Access Form](#).
2. Receive an **activation code** in an email.
3. Create a My Ontario Account.
4. Redeem the emailed **activation code** (can only be used once and is valid for 30 days).
5. Verify through email authentication (via a numeric code).
6. Start using the Partner Portal, add/update/delete users.

1. Fill and submit the Intake Access form

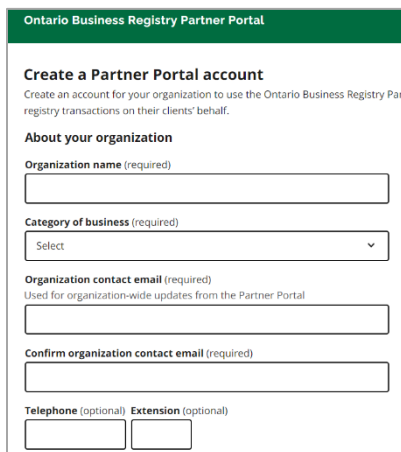
Completing the **Intake Access** form consists of 3 steps:

- a. Create My Organization's Account
- b. Create the first Administrator User (Admin user)
- c. Review and accept the Access Agreement Terms and Conditions

a. Creating My Organization's Account

Input your organization's details including name, type of business, email address and physical address.

- The Find Address button will assist you in submitting a full address.
- Input all telephone numbers associated with your organization.



The screenshot shows a web form titled "Ontario Business Registry Partner Portal" with a green header. The main heading is "Create a Partner Portal account". Below this, there is a sub-heading "About your organization" and several input fields: "Organization name (required)" (text box), "Category of business (required)" (dropdown menu with "Select" visible), "Organization contact email (required)" (text box with a note "Used for organization-wide updates from the Partner Portal"), "Confirm organization contact email (required)" (text box), and "Telephone (optional)" and "Extension (optional)" (two separate text boxes).

b. Creating the first Administrator (Admin User)

An organization's admin user will have the ability to add/delete/update users to your organization's account profile.

- Input the first, middle, last name, and contact details for the individual who will be your organization's first admin user.
- Please note you are responsible for keeping your information up to date.
- You can access your details at any time by selecting **My User** details from the **My Tools** menu.
- Click the **Next** button when all fields are complete.

About you

As the person creating this account, you will be your organization's account administrator, including adding other users and assigning other administrators.

First name (required)

Last name (required)

Administrator email (required)

The account activation code will be sent to this email address for initial user and setup.

c. Review and Accepting the Access Agreement Terms and Conditions

- You will need to **accept the Access Agreement Terms and Conditions before** creating the organization account.

I have reviewed and accepted the [access agreement terms and conditions](#) (required)

Acceptance

You must accept and agree with the Terms and Conditions without modification. By logging onto OBR Partner Portal you acknowledge that you have read and understood the Terms and Conditions. If you do not agree, you will not be granted access to the OBR Partner Portal.

Need assistance? Please call ServiceOntario at (416) 314-8880 (GTA) or 1-800-361-3223.

Decline Accept

- Select **Create Organization's Account**
 - the system will validate that the organization is unique (does not already exist)
- If the validation is successful, you will be presented with a page informing them that the submission is complete and will be shown the next steps to proceed to Partner Portal.

2. Receive an Activation Code

After completing the **Access Request** form, an activation code will be generated and sent by the system via e-mail to the individual that's making the request to the address provided under the user/organization profile.

The Activation Code:

- Can only **be used once** (the first-time logging into the Partner Portal)
- **Is valid for 30 days** from the day the organization's account was created.
- Can be re-sent if required.

3. My Ontario Account Login

To access the Partner Portal, you must log in using a My Ontario Account. This means the user/intermediary must have or create My Ontario login credentials (ID and password). If you have already created a My Ontario Account for a different Government of Ontario service, you don't have to create a new account. You can use your existing log in credentials to access Partner Portal. New Partner Portal users will log in using their My Ontario Account, then subsequently create their Partner Portal profile. Existing Partner Portal users will see their data automatically.

Creating a My Ontario Account

When you are added to an OBR Partner Portal Organization, you will receive an email with an activation code [Subject line: Activation Code for New Account Created for [organization name], Ontario Business Registry Partner Portal]

Step 1. Using the link that is in the Activation Code email, you can login to your existing My Ontario Account or alternatively, select **Create Account** and follow the steps to create a My Ontario Account.

Step 2. Enter your **email** and create a **password**. Agree to the **Terms of Service** and select **Create Account**.

Step 3. Check your email inbox for the verification email.

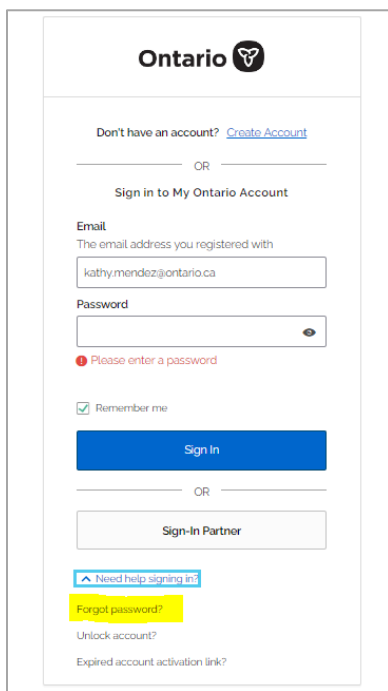
Step 4. Select **Start Activation** from the email received and select **Complete Activation**. This completes the new credentials set up of the My Ontario account.

For My Ontario Account password recovery only:

If you forget your password for your My Ontario log in, select “Need help signing in” drop down menu at the bottom of the sign in page and select “Forgot password”.

When prompted, enter the email you used when setting up your My Ontario Account.

You will receive an email with a link to reset your password. This link is valid for 1 hour. If you do not reset your password within an hour, you will need to reset your password again.

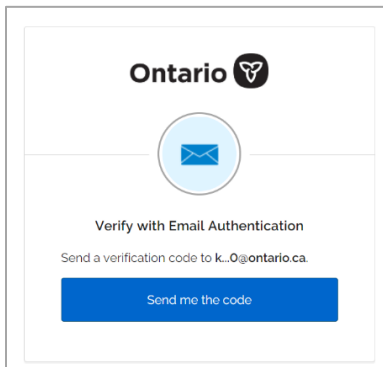


4. Multi-Factor Authentication

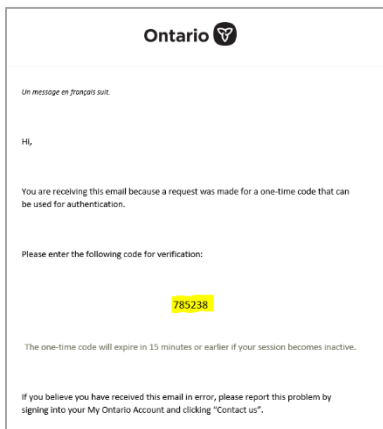
This feature provides enhanced security for Partner Portal users when accessing the OBR system. **A numeric code** is emailed to you as another layer of security for user verification.

Note: These steps must be completed every time a user logs in. This feature cannot be turned off nor can a user opt out of the Multi-Factor Authentication.

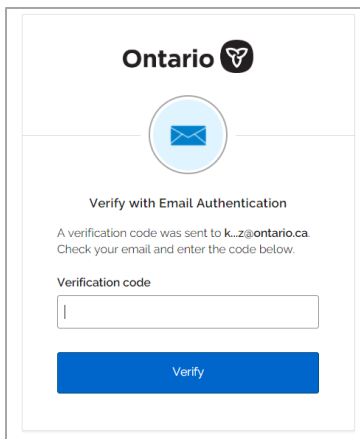
Step 1. Select **Send me the code** which will email a numeric code as part of the Multi Factor Authentication.



Step 2. Get the verification code from your email



Step 3. Return to the webpage to **enter** the verification code and **select** Verify



Step 4. Select Launch Partner Portal

Ontario Business Registry

Partner Portal

The business registry system supports Ontario businesses when starting, operating and dissolving a business in Ontario. The Ontario Business Registry Partner Portal is for fee-exempt broader public sector/OPS partners and other organizations in agreement with the Ministry of Public and Business Services to provide business registry services.

If this is your first time here, you will be asked to enter an activation code. If you do not have an activation code, if you are not yet registered or would like more information on getting access to the partner portal, go to Ontario.ca/businessregistry.

[Launch Partner Portal](#)

5. Redeem the Activation Code

To gain access to the OBR Partner Portal Organization, enter the activation code that was sent to you by email and select continue.

Ontario French

User Account Activation

New User Account

Please click continue to activate your user account.

Activation Code *

6. Start using the Partner Portal

If the system confirms that the Activation Code is valid, the user will be presented with the Partner Portal Dashboard page. The Dashboard is the home page for a logged in user of the Partner Portal.

Ontario Français

Dashboard Services Noticeboard

Dashboard

Welcome Clients and entities Work in progress 1 Completed 0 Compte de dépôt 0

Welcome

The Partner Portal allows intermediaries to make transactions on behalf of their business clients in the Partner Portal. Services that are offered include: registering a new business, filing annual returns and updating business information.

[Search the registry](#)
Search for public information about entities on the register.

My Reminders (0)
No results found

Work in progress (1)
Displaying 1-1 of 1 results

Register	Description	Status	Date Created	Expires On	Discard
Personnes morales	Incorporate an Ontario Business Corporation (PENDING) Assign To Me	Active	August 03, 2023	November 01, 2023	Discard

For future access to the Partner Portal: Once your account is activated, you can log in with My Ontario Account to access the Partner Portal. Copy the full URL below and manually paste the URL in your Bookmark tab. In most browsers, you can edit the URL by selecting the More button in the Bookmark tab.

Link: [Ontario Business Registry for Partner \(gov.on.ca\)](https://www.ontario.ca/business-registry/partner-portal)

Part 2 - Adding/Modifying/Deleting Users from Intermediary Organizations

An Admin User may perform several changes to User and Organization's profiles:

Adding a User/Admin User

1. From the Dashboard page, select **View Organization Details**
2. From the View Organization page, select **Add Organization User**
3. From the Add Organization user page, enter the details of the user and select **Create User**

Note: To add an Admin user, select the Admin User check box

Modifying an Admin User's Profile

1. From the Dashboard page, select **Maintain User Details**
2. From the User Details page, select **Edit my details**
3. From the Maintain my details page, edit required fields, and select **Save User**

Modifying and Deleting an Organization User's Profile

1. From the View Organization page, select the name of the user
2. From the View Organization User page, select **Maintain Organization User**
3. From the Maintain Organization User page, edit required fields and select **Save User**

Delete an Organization User

1. From the View Organization page, select the name of the user
2. From the View Organization User page, select **Maintain Organization User**
3. From the View Organization User page, select **Delete This User** and **OK** on the pop up Confirm Delete window

Resending Activation Code

1. From the View Organization page, select the name of the user
2. From the View Organization User page, select **Maintain Organization User**
3. From the View Organization User page, select **Resend Activation Code**

Note: This is the process for resending an Activation Code for an Organization User and is not the same process for initial activation of the organizational profile.

An Activation Code is sent to the user's email address in the system.

Modifying an Intermediary Organization's Profile

1. From the Dashboard page, select **View Organization Details**
2. From the View Organization Details page, select **Maintain Organization**
3. From the Maintain Organization page, enter the updated information in fields provided and select **Save Organization**

Part 3 - Claiming Authority of an Entity or Corporation as an Intermediary

The process to claim Authority of an Entity or Corporation depends on if a registration for that Entity or Corporation already exists in the Ontario Business Registry or if that Entity or Corporation is to be newly incorporated.

When an intermediary registers or incorporates an entity in the Partner Portal, they will automatically get delegated authority over the newly registered/incorporated entity. The Company Key will be mailed or emailed to the business client. A record of this delegated authority will also be maintained in the system that can be referenced by both the intermediary and the business client using Partner Portal and Self-Serve portal, respectively.

For existing entities, your business client may [share their Company Key](#) as a way to grant you authority. A Company Key is similar to the Personal Identification Number (PIN) you use at the bank or to access other online accounts or services. The other alternate method is described below for your business client to grant you authority.

For more information that describes the requirements in the use of a Company Key for filings under the specified business statutes, please visit [Ontario.ca](https://www.ontario.ca).

Steps for an Intermediary to Claim Authority using their Client's Company Key

Once an intermediary has obtained their client's Company Key, the following steps are required to claim authority by redeeming the Company Key.

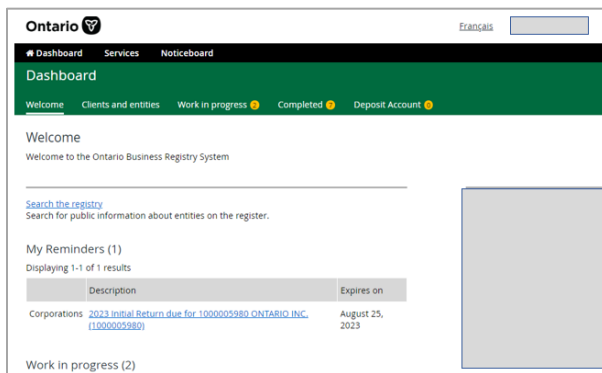
If your client does not have a Company Key, they may request one by visiting [Ontario.ca](https://www.ontario.ca).

Note: The ministry issues a Company Key to an entity using their official email address, or mailing address, or to the requester provided they have answered the security questions correctly. No intervention is required from an intermediary's client if the Entity or Corporation has shared the Company Key with the intermediary.

Redeeming the Company Key within the Partner Portal

The user will follow the regular steps for logging into the Partner Portal.

Step 1: On the dashboard page, select **Search Registry**.



Step 2: On the Search page, enter the business entity identifier – OCN – then select **Search**.

Step 3: From the displayed result, select the hyperlinked identifier displayed.

Step 4: From the View Corporation page, select user **profile name** and select **Confirm Receipt of Authority**.

Step 5: From **Confirm Receipt of Authority** page, enter the Company Key details in field and select Validate.

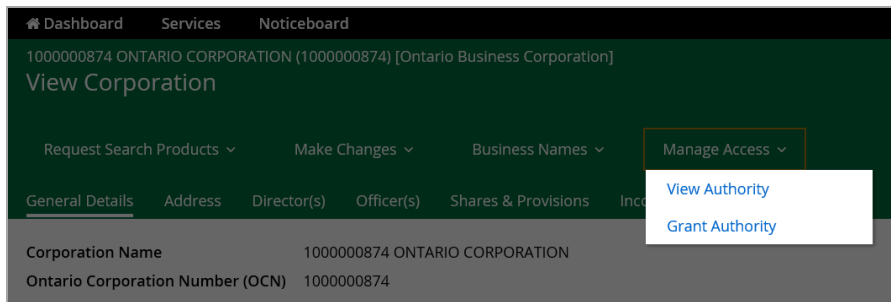
Step 6: From the Confirm Receipt of Authority page, select the **checkbox** and select **Submit**.

1000000874 ONTARIO CORPORATION (1000000874) [Ontario Business Corporation]
Confirm Receipt of Authority

I, Sydney Blake, of Sidy Enterprise 2 confirm that Sidy Enterprise 2 is legally authorised to file documents in respect of this company *

Submit

Step 7: To confirm that Authority was granted, from the view corporation page, select **Manage Access** and **View Authority** from the menu.



Step 8: Select **View Authority** link and scroll down to **Authority type** and the **Authority Request** sections to review and confirm the authorization.

1000001461 ONTARIO INC. (1000001461) [Ontario Business Corporation]
View Authority

Current Authorities

Authority type	Authorized Agent
Organisation Name	Thompson Reuters
	Approved automatically by filing the business name registration on November 08, 2021 15:11
Authority type	Authorized Agent
Organisation Name	Testing Sandbox Partner Portal Inc.
	Approved by Testing Sandbox Partner Portal Inc.(kate mendez) on August 24, 2023 13:54

Authority Requests

There are no pending authorities for this company

Historical Information

There are no revoked authorities for this company

Exit

Part 4 - Navigating the Partner Portal Dashboard

After signing into the Partner Portal, the first page displayed is the **Dashboard**.

Welcome tab displays a quick link to **Search the Registry**, where you can search for all entities that are registered in the Ontario Business Registry (OBR).

My Reminders displays reminders of upcoming transactions that are due and must be completed by a specific date. A limit of 10 reminders are displayed in this section.

Work in progress displays incomplete applications that are saved in draft to be completed at a later date/time. There is a limit of 10 items displayed per page.

The screenshot shows the Ontario Business Registry Dashboard. The user is logged in as 'Francis'. The dashboard has a green header with 'Dashboard', 'Services', and 'Noticeboard' tabs. Below the header, there are navigation links: 'Welcome', 'Clients and entities', 'Work in progress', 'Completed', and 'Deposit Account'. The main content area is titled 'Welcome' and includes a 'Search the registry' link, a 'My Reminders (1)' section with a table of reminders, and a 'Work in progress (2)' section with a table of pending applications.

Description	Expires on
Corporations 2023 Initial Return due for 1000005980. ONTARIO INC. (1000005980)	August 25, 2023

Register	Description	Status	Date Created	Expires on	Discard
Corporations	Initial Return for an Extra-Provincial Corporation (1000006080) Assign To Me	Active	August 17, 2023	November 15, 2023	Discard
Corporations	Incorporate an Ontario Business Corporation (PENDING) Assign To Me	Active	August 15, 2023	November 13, 2023	Discard

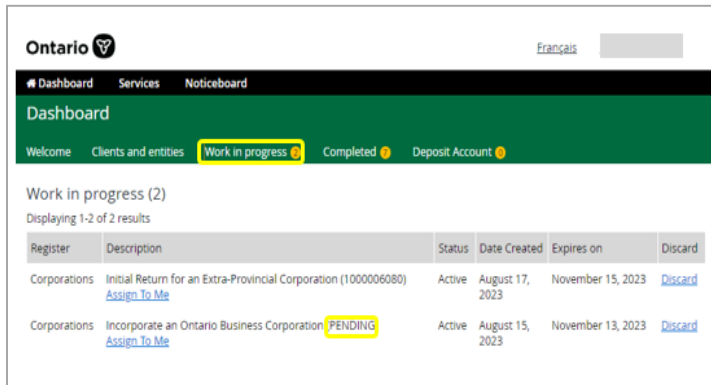
The screenshot shows the Ontario Business Registry Dashboard with the 'Clients and entities' tab selected. It features a search filter 'Filter by Entity Name or OCN/ BIN' and a table listing entities with their names and OCN/ BIN numbers. The table shows 15 results out of 36.

Entity Name	OCN/ BIN
005VMNAKIP	1000002486
00BTO29E70 TEST INC.	1000003066
02IGTX69E	1000004548
04GA6310JD	1000003960
0HMD91K2XF INC.	1000002807

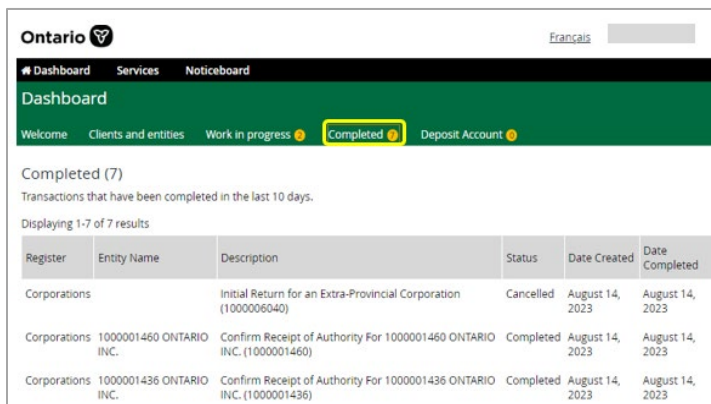
Clients and entities displays the list of entities that the organization has authority over. In this section you can filter using the entity name or entity number or by

selecting next to see the next tab list of names and numbers of entities. Once you select the entity it will take you to the business profile page from the registry.

Work in progress is for pending applications that have been saved for completion. It will be saved here until you are ready to complete the transaction, or it expires. You can also choose to discard and delete the transaction. At this point it is in draft mode and not paid for. If this section is blank, then there are no applications pending.

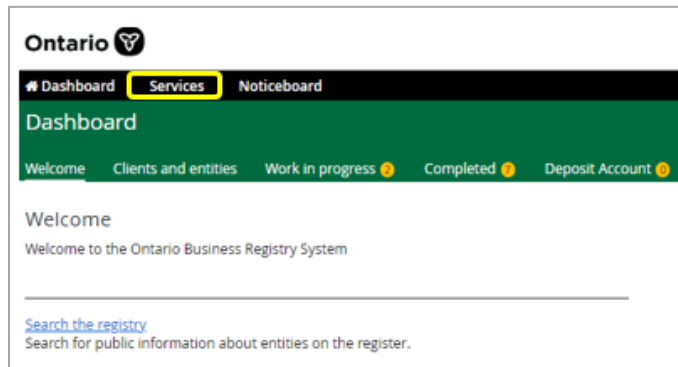


The **Completed** tab displays a list of transactions that have been completed in the last 10 days.



Services

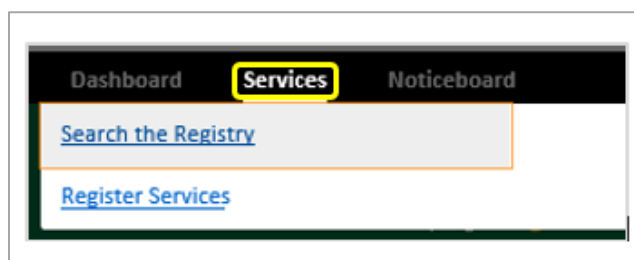
Search the Registry and Register Services



Search the Registry obtains public information about all existing entities.

In the **Services** tab you can access **Search the Registry** and **Register Services** functions.

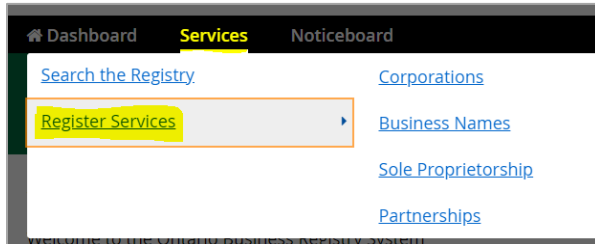
1. For a basic search, In the **Search For** field enter one of the following information;
 - Full or partial name (e.g., digital technology)
 - Ontario Corporation Number, or
 - Business Identification Number
2. Select the **Search** button



Register services is for conducting new transactions on behalf of clients. Some transactions can include Incorporation of a corporation or registration of a sole proprietorship.

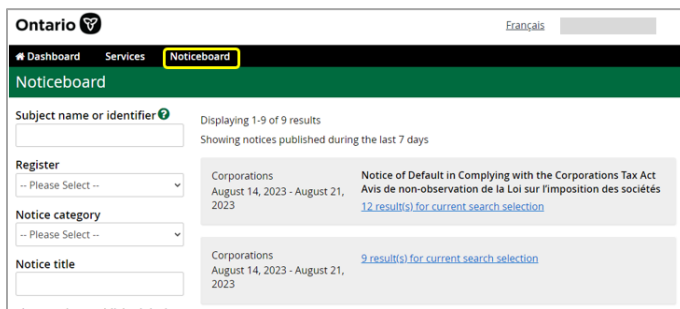
For new registrations, the organization does not require authority over the entity since the entity doesn't exist in the Ontario Business Registry.

Once the intermediary completes the new transaction on behalf of the client, they will automatically have authority over the entity; the new entity will be displayed under the **Clients and Entities** section.



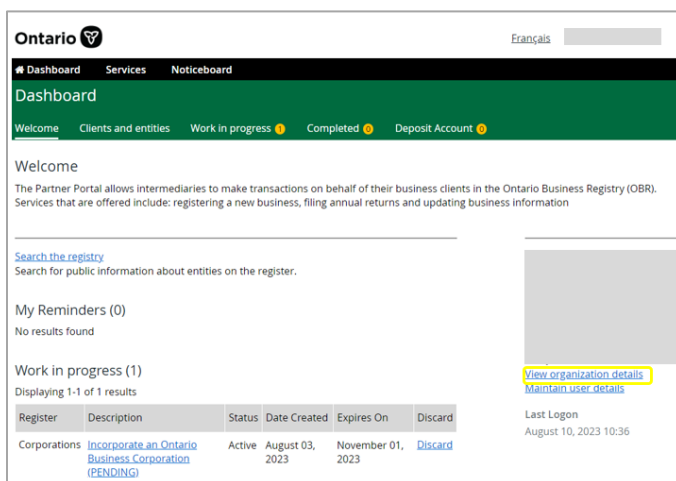
The Noticeboard

The **Noticeboard** notifies the public of corporate cancellations, pending cancellations, etc. These notices previously appeared in the [Ontario Gazette](#).

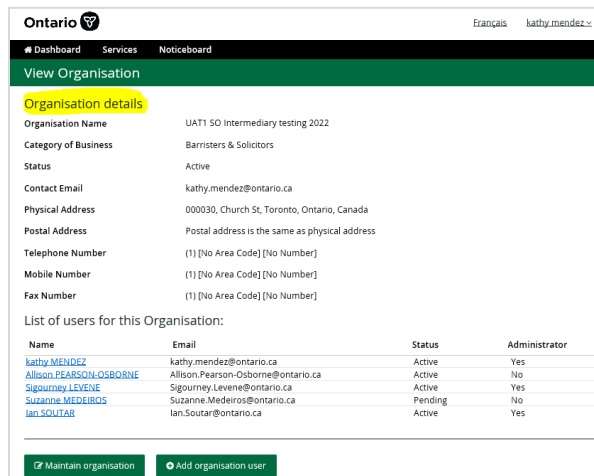


Intermediary Organization Details

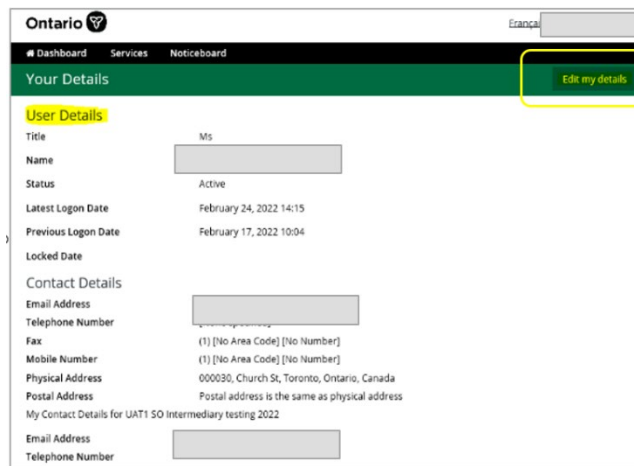
The name and address of your organization is displayed on the right side of the page.



View Organization details displays who in the organization has access to the portal. Only the organization administrator has access to add or delete users.



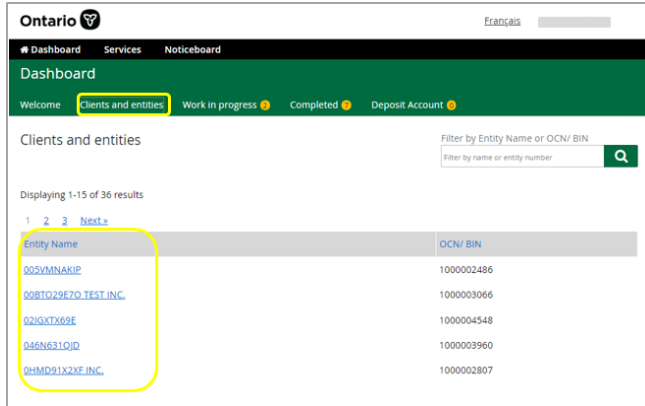
Maintain User Details displays your information. A user can edit their own information as needed.



Maintenance transactions for authorized entities

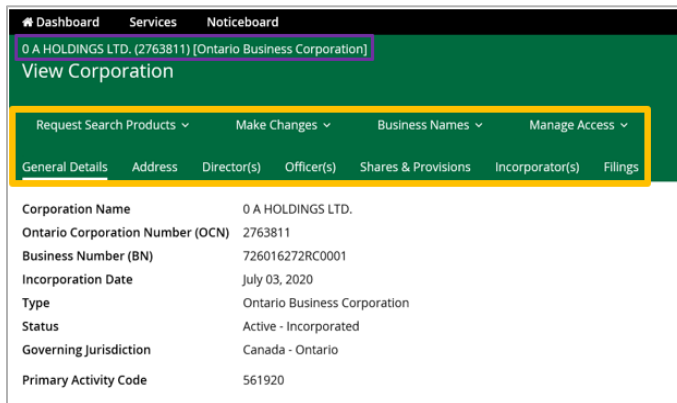
This section demonstrates where to go in the dashboard to access an entity that the organization has delegated authority over to perform a maintenance transaction.

- Select **Clients and entities** to view your list of entities.
- Select an entity and review the existing information.



Make Changes allows you to update information on behalf of your entity. Select the name of the transaction you want to perform from the drop-down menu.

Transactions available for this corporation or entity will be listed under **Make Changes**.



Request Search Products

Step 1: From the **Request Search Products** drop-down menu select:

- Request Profile Report, or
- List and Request Document
- Request Certificate of Status



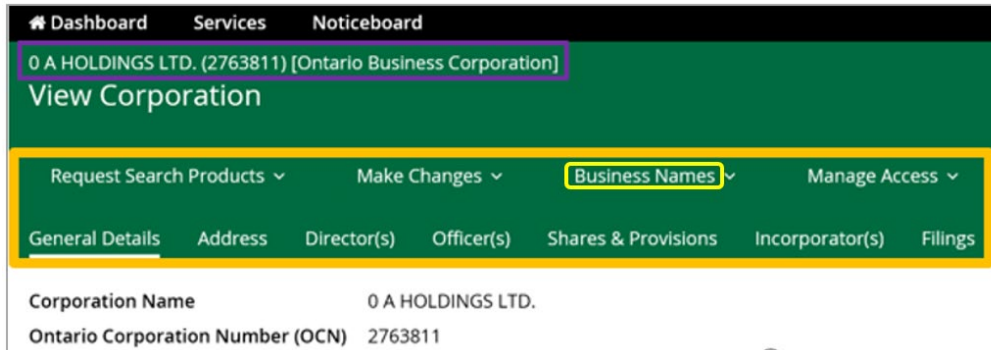
Step 2: When **Request Profile Report** is selected:

- a. Select the radio button for **Current Report**, or select the radio button for **Previous Date**:
 - Select the **calendar icon** and MONTH, DD, YYYY for the request
- b. Enter your email address where the report should be sent to in the Email field
- c. Re-enter your email address in the Confirm Email field
- d. Select the Submit button
- e. An important notice is displayed. Select the **Cancel** link, or **OK** button or **"X"** close-out button to return to the business profile
- f. The report is then sent to your email address

Business Names

The **Business Names** tab allows you to register a business name.

Select the **Business Names** tab then select **Register a Business Name** to continue with this transaction.



Review and accept the Terms and Conditions then complete the contact information sections as required.

** The requirement to accept Terms and Conditions also applies to new incorporations, registrations, and maintenance transactions

Manage Access



View Authority – View current and historical authorities over this particular entity.

Logging out of the Partner Portal

It is a best practice to log out of the Partner Portal at the conclusion of every session.

To logout of a session, click on your username in the upper right-hand corner of any screen view of the Partner Portal and select Logoff in the drop-down menu.

Session Inactivity

During your Partner Portal session if there is no activity for **30 minutes**, the system will prompt the user with a message to continue the session. If you acknowledge this message within 30 minutes, your session will continue, and your changes will not be lost. If you do not acknowledge this message within 30 minutes, you will be logged out of the system and any changes will be lost.

Useful Weblinks

Click on the bolded links to access the content described.

[**Ontario.ca/BusinessRegistry**](#) – the Ontario Business Registry homepage contains information regarding notices of filing requirements, service standards, fees, forms, and updates regarding service outages.

[**Ontario.ca/Partner Portal**](#) – find out if you are eligible to use the OBR Partner Portal to make transactions in the Ontario Business Registry on behalf of your business clients.

[**Requesting a Company Key**](#) – you will require the registered name of the business, or an Ontario Corporation Number (OCN) or a Business Identification Number (BIN).

[**Company Key Notice**](#) - A notice that describes the requirements for the use of a Company Key for filings under the specified business statutes.

[**Notices of Filing Requirements**](#) - these notices will tell you what information you need and how you can file under all eight business law statutes.

[**OBR Forms**](#) - if you prefer or need to transact by mail or email, visit this webpage to find the forms you will need.

[**Central Forms Repository**](#) – where you can find an electronic copy of this guide posted publicly.

[**Terms and Conditions**](#) – these are the Terms and Conditions for filing with the Ministry of Public and Business Service Delivery.

[**Service Standards and Fees**](#) – learn how much it costs and how long it takes to file documents and order search products online, email or by mail.