Full Text Version of:

Transfer Payment Ontario: How to Access the Partner Portal and Perform Evaluations and Recommendations

A musical introduction plays at the title screen.

Welcome to Transfer Payment Ontario. How to Access the Partner Portal and Perform Evaluations and Recommendations.

Important Notice accompanied by an image of the volume icon from the task bar.

For an optimal learning experience and best performance, turn your audio on. For this six 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.

Learning objectives.

In this video, you will learn how to update your partner profile information, view all the funding submission cases, program applications plus attachments, that have been assigned to you, and perform evaluations and recommendations.

A browser appears displaying the Transfer Payment Account page. There are fields to identify yourself, and one labelled Invitation Number, and a note advising to sign up for a ONe-key Login ID and password, visit https://www.app.grants.gov.on.ca/gr/tpcr/#/externalLogin.

To access the Partner Portal, a few pre-requisites need to be in place. You already should have a ONe Key Login ID and Password. If you do not have these two requirements, you will need to sign up. You will not be able to access the Transfer Payment Ontario System (TPON), without a ONe-Key Login ID and Password. TPON will send you an Invitation Code via email, which you enter during your ONe-Key TPON registration. This will allow you to access the system as a Partner.

The Transfer Payment Ontario Page contains 4 menu cards.

Existing TPON users need to select Request TP Service.

The request access to funding opportunities page has two fields and two buttons.

Enter the Invitation Code sent from TPON via email, then select Request.

A desktop contains a Google Chrome icon.

To log into the Partner Portal, Open Google Chrome. In the address area type, "ontario.ca/getfunding". Select Log in to Transfer Payment Ontario.

The ONe-Key sign in page will appear. Log in to ONe-key using your ONe-Key ID and Password.

The transfer payment Ontario home page has three menu cards showing.

Select See Funding Opportunities on the Home Page.

List of organizations appears with one row.

You would select the Organization Legal Name hyperlink to proceed to the Transfer Payment Ontario system.

You will be redirected to the Transfer Payment Ontario Home Page. To log out, select the log out button at the top right corner of your screen.

To view and edit your Partner profile, select the User Menu icon to open the Personal Profile page. Note that most of the information in the Partner profile is editable. The only pieces of information that you cannot update are your first name, last name, and your user ID.

The Personal Profile page contains three sections: Personal Information, Contact Information, and User Information. You can select the plus button to open the desired section or select the Expand All button to view all the sections.

Make the necessary edits. Fields marked with a red asterisk are mandatory. Only fields with a white background are editable.

When you are done, select Ctrl+S to save.

Back on the Home page.

Once you have been assigned a case, it automatically appears in your Cases list. Select the Cases icon from your Home Page.

Upon selecting the Cases icon, a window will appear where you will be able view all the cases that have been assigned to you. Select the Case Number link of the case that you would like to review.

When you open a case the top section displays an overview of the file, while the details appear in the sub-tabs at the bottom. Scroll down to the bottom of the page. The sub-tab menu appears when you click on the down arrow.

There are several options in the list.

Select the Attachments sub-tab to review the application and other attachments associated with the application.

A list of attachment is shown.

Select the appropriate link in the File Name column, to download files one by one. You can also select the Download Selected button to have all attachments downloaded onto your workstation. The document will open in a new window. You can add your own attachments by selecting the New button. Once the application and other attachments have been reviewed, you can then load the pre-defined template, and evaluate the submission by scoring each item that the ministry has defined.

The sub-tabs options appear again.

To perform an evaluation, select the Evaluations sub-tab. A new window with the case details will appear. Scroll to the bottom of the page.

There are two empty tables: Evaluations, which has a New tool, and Evaluation Attributes.

Select New.

A new line item is created. Navigate to the Template Name column and select the pick list icon.

Select the template, and then select OK.

One Evaluation and several Evaluation Attributes are displayed.

Press Ctrl+S to load all evaluation attributes. Upon reading the description fields to understand the attribute the ministry asked you to evaluate, and confirming it with the submission, you may score each attribute. Within the Value column, select the picklist for the attribute you want to score.

A scoring window will appear. Select the appropriate score. Repeat until all attributes are scored and completed.

As you score each attribute, the Assessment Score and Percentage will increase. Within the Comments column, you may enter a comment.

To complete the evaluation process, you will provide a final recommendation and notify the ministry that you have completed your evaluations.

The sub-tabs options appear again.

To initiate a recommendation, select the Recommendations sub-tab.

A new window with the case details will appear. Scroll to the bottom of the page and select New.

In the Recommendations field, provide your comments.

A hand enters “provide you comments” in the Recommendation column.

Change Status from Draft to Final. This will notify the ministry that you have completed your evaluations and are submitting your final recommendation. You have now completed the evaluation process.

Summary.

In this video, you learned how to update your partner profile information, view all the funding submission cases, program applications plus attachments, that have been assigned to you, and perform evaluations and recommendations.

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