Full Text Version of:

Transfer Payment Ontario: How to Submit a Report

There is a decorative compass on the title page and a short musical introduction plays.

Welcome to Transfer Payment Ontario: How to Submit a Report.

The speaker icon is shown in a system tray. Note: 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 webpage is updated, its look may change over time, but the instructions are still valid.

For optimal learning experience and best performance, please turn your audio on. For this 8 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 it's updated, the look of the webpage may change over time, but the instructions are still valid.

Behind the items listed is an image of a decorative compass.

In this video, you will learn how to: Locate and review report back requirements, submit a report back, and track your report back submission.

A new browser window appears, the URL is entered into the first field and the webpage appears, called 'Get funding from the Ontario government.' It includes the words 'Find out what funding your organization could receive from the Ontario Government and learn how to register with Transfer Payment Ontario, the 'Log in to Transfer Payment Ontario' button, then text indicating 'On this page: Overview, 2. Register for Transfer Payment Ontario, 3. Available funding, 4. Get help, 5. Contact us'.

Transfer Payment programs require recipients to report on deliverables online, using the Transfer Payment Ontario System. When a report is due, you will receive an email notification, and a reminder email for any overdue reports. To access our webpage, first you enter the URL into your browser. We recommend Google Chrome.

http://ontario.ca/getfunding

Then select 'Log in to Transfer Payment Ontario'.

The hand opens a browser, types in the link, and selects 'Log in to Transfer Payment Ontario' on the page.

Text on this page says Transfer Payment Ontario. Sign in with your ONe-key ID. New to ONe-key? A ONe-key account gives you secure access to Ontario Government programs and services. Learn more. Don't have a ONe-key ID? Sign up now! Or sign in with GO-secure. GO Secure is used specifically by individuals within the Ontario government and the broader public sector. The page is titled 'Transfer Payment Ontario'. Beneath, the text says 'Sign in with your ONe-key ID. New to ONe-key? A ONe-key account gives you secure access to Ontario Government programs and services. Learn more. Don't have a ONe-key ID? Sign up now!'. Below is another option stating, 'Or sign in with GO Secure: Go Secure is used specifically by individuals within the Ontario government and the broader public sector'. On the side of the page, there is a yellow-green box with input fields for login info.

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.

The hand indicates each login area, selects each One-Key field, then selects the Sign In button.

Three different options appear with decorative images, and these words, 'View/Update Organization. Search Organization, View and Update registration information. See Funding Opportunities. Get funding, submit a report, approve a contract and track progress. 'The Home Page is displayed with two menu cards, giving the choices of 'View/Update Organization: Search Organization, View, and Update registration information' and 'See Funding Opportunities: Get funding, submit a report, approve a contract and track progress'.

The screen will display three options. First, navigate to View and Update Organization to make all necessary updates to your organization's profile. It is important that your organization's details are accurate and updated. Some of them appear on the report back form. If you are not the administrator of your organization's profile, you cannot edit its content. Contact your organization's administrator or our help desk to update the organization information. Now, select “See Funding Opportunities” .

The hand scrolls over 'View/Update Organization', then selects 'See Funding Opportunities'.

There are three sections on the See Funding Opportunities page. Under Transfer Payment Services is the list of organizations showing the legal name, TP Service and Access Type for each. Below this are sections labeled Pending/Rejected Request and Request Access to TP Service.

This screen will only appear if your account is associated with multiple organizations. You will see a list of organizations associated with your account. Select the organization, for which you are submitting a report.

The hand selects the hyperlinked name.

This page is called “I am looking to”. On the right it greets you, shows your name and the organization name, and below that, links to recently viewed cases by 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.

Reports are only completed for active cases. To view and track the status of your case, select, 'See My Funding History'. To access and submit reports back to the funding ministry, select “Submit Report to Ministry”.

The hand scrolls over both buttons, then selects 'Submit Report to Ministry.

The page is titled 'Submit Report to Ministry'. There are two tabs under labeled 'Report Back by Case' and 'All Report Backs'. By default, it is on the 'All Report Backs' tab. Under, there is text stating, 'Review, download, and/or submit a report back. Below is a list of all your organization's report backs, including any outstanding or previously submitted reports. You can query the list to narrow the results or find a specific type of report back'. Beneath that, the report backs are represented by icons with the date, type of report back, the case number, and the report status.

Here, reports are located in three tabs: Outstanding Report Backs, Report Back by Case, and All Report Backs. Reports associated to your cases are displayed like cards, or as a List.

The hand indicates each tab, then selects 'List'.

The page is titled 'Submit Report to Ministry'. It has the same text as the previous page, except instead of icons it shows a list of report backs relevant to the search.

Review the case number, status, due date, and report type.

The hand points to each field.

Search using the Query tool, or browse through the list using the navigational links.

The hand points to First, Previous, Next, Last.

To submit a report, select its 'Type' hyperlink. The status of the report will be listed as Pending. You can also search for a report by navigating to the 'Report Back By Case' tab.

The hand selects the 'Report Back By Case' tab

The page is titled 'Submit Report to Ministry'. It is on the 'Report Back By Case' tab. Below is a list titled 'Cases' with a list of relevant cases. Selecting a row will show all relevant report backs under. Selecting a hyperlink in 'Report Type' will allow you to access the case report.

Select the correct Case Number. The corresponding report back will appear in the section below. Select the 'Report Type' hyperlink to initiate your report back submission. If the funding ministry allows for reports to be created by your organization, the new button will be enabled, and you would select it to create a report back record.

The hand selects a row, then selects the hyperlinked type for the report.

The page is titled 'Submit Report to Ministry: Interim'. There is a timeline underneath showing the steps of 'Report Back Details', 'Complete Report Back', 'Attach Supporting Documents', and 'Submit Report Back'. On the first step, there are sections depicting report back information such as Program Documentation and Required Attachments . On the right side, there is a section showing additional details of the report.

New report back submissions begin on the first of four steps.

In Step 1, you review report back details. Your report submission is described on the right. Review any report back related documents available for download.

The hand points to Program Documentation Section.

At the bottom of the page are attachments that may be mandatory or optional. When you've finished reviewing everything in this step, select Next.

The hand scrolls over each section, then selects 'Next'

The page shows the second step of the process. The text states, 'Step 2: Complete Report Back Documents' with instructions on how to properly download the report form. Beneath, there is a blue button labeled 'Download Report Form'. There is a button labeled '+Upload Report Form'. Underneath, there are two buttons labeled 'Back' and 'Next'.

In Step 2, you download and complete the report back form. We recommend using Adobe Acrobat Reader DC and disabling your browser's pop-up blocker.

The hand points to the get recommended version hyperlink.

You can find troubleshooting tips for problems with downloading here as well. Select 'Download Report Form'.

The hand selects 'Download Report Form'.

A pop-up appears with the text stating, 'File Download: You are downloading the file. Click the Download button to proceed'. Beneath, there are two buttons labeled 'Download' and 'Cancel'.

Then select 'Download'. Work on the form offline. If a session is idle for more than 15 minutes, the system will log you out automatically.

The hand selects 'Download', then opens the downloaded file.

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.

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

The hand selects Adobe Reader.

The page is showing a sample version of the document. On the front page, there is information regarding each section of the document. On the top right corner, there are two buttons labeled 'Validate' and 'Expand All'. Report documents will vary based on the type of report.

The Transfer Payment Ontario system, provides a report form, that looks like the funding submission. Navigate to any section, using these tabs. Select Expand, to view all sections. If any organization information on the form is incorrect, close the form. From the Home page, select

View/Update Organization, and fix the information. Then download the report form again. Once you have completed all the sections, select Validate.

The hand selects Validate.

If anything is missing, it is reported here.

Message appears indicating an error.

Select the OK button, and complete the missing information. Validate the form again.

The hand selects Validate, and message appears stating form validated successfully.

When validation is successful, save the form on your local computer. Do not scan the form. All information and signatures must to be entered and validated electronically.

Back on the page titled 'Submit Report to Ministry', it displays as previously mentioned.

To upload your validated form, log back in to Transfer Payment Ontario. Select See Funding Opportunities, and Submit Report to Ministry. Select the report back you wish to submit by selecting the 'Report Type'.

The hand selects a hyperlinked report type, “Interim”.

Step 1 is not shown in the video. The Submit Report to Ministry page appears, on Step 2. The page shows the second step of the process. The text states, 'Step 2: Complete Report Back' with instructions on how to properly download the report form. Beneath, there is a blue button labeled 'Download Report Form'. There is a button labeled '+Upload Report Form'. Underneath, there are two buttons labeled 'Back' and 'Next'.

Return to Step 2, Complete Report Back, and select 'Upload Report Form'.

The hand selects 'Complete Report Back', then selects '+Upload Report Form'.

On the same page as before, a new section appears with 'File Name', 'Comments', and two buttons under labeled 'Upload' and 'Cancel'.

To upload the form, select the look-up icon in the 'File Name' field, and locate the saved form on your computer. Add comments if required, then select 'Upload'.

The upload is completed.

If the upload is successful, the system will take you to Step 3.

On the third step titled 'Attach Supporting Documents', there is a section titled 'Required Supporting Attachments' that portrays a list of mandatory or optional documents for the report. Below is another section titled 'Upload Supporting Attachments' that portrays a list of documents that has been uploaded. Above this list, there are four buttons labeled '+Add', 'Delete', 'Cancel', and 'Query'.

Step 3 is for Attaching Supporting Documents. Required supporting documents are displayed on this page. Select '+Add' to upload a file.

The hand scrolls over 'Required Attachments', then selects '+Add' to upload any files.

On the same page as before, an attachment type is selected under the list of uploaded attachments.

For each supporting document, select the 'Attachment Type' from the drop-down menu.

The hand selects the drown down, then chooses an attachment type.

On the same page as before scrolled down, your attachment will appear. Below, there is a section titled 'Review Organization Attachments' with a list of your organization's attachments. There is a 'Query' button and also a 'Refresh' button for the list.

Click outside of the active box outlined in red or press CTRL+S to save your entry. After uploading your attachments, select the Next button to continue.

The hand saves the entry, then scrolls up and selects 'Next.'

On the fourth step titled 'Submit Report Back'. There is text asking about finalizing the report, and a Complete Submission button.

Step 4 is the final step where you submit your report back. Select 'Complete Submission'.

The hand selects 'Submit'.

The page displays a congratulatory message. Beneath, there is a blue button labeled 'Back to Home'. At the top of the page, a black menu bar displays icons relating to navigation.

A confirmation message appears. Note the status of your submission changes from Pending to Submitted. No other changes can be made once the status changes to Submitted. 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.

The hand selects Back to home button.

The page is titled 'I am Looking To' with a binocular icon. Below, there are six menu cards with icons labeled 'Submit for Funding, Submit Report to Ministry, See My Payments, See My Funding History, See my Repayments, Approve my Contracts'. To the right of the cards, there is a section titled 'Recently Viewed' which lists recent records as hyperlinks. On the top of the page, there is a black menu bar with functionality functions on the top right corner.

Then select 'Submit Report to Ministry'.

The hand selects 'Submit Report to Ministry'

Your submitted report can be accessed by selecting the Report Type hyperlink.

The hand selects 'Interim Report'.

The page is titled 'Interim'. Below, there is a section titled 'Attachments' with a list of supporting documents that has been uploaded. On the top of the list, there are buttons labeled '+Add', 'Cancel', 'Delete', and 'Query'. On the right side of the page, there are additional details about your report back submission.

The submitted 'Interim' report page is displayed with a list of program documentation and Attachments. Select the Document or File Name to download any item.

The hand points to file name hyperlink.

If required, to upload additional documents select the Add button.

Behind the items listed is an image of a decorative compass.

In this video, you learned how to, locate and review report back requirements, submit a report back, and track your report back submission. Thank you for watching.