Full Text Version of:

Transfer Payment Ontario: How to Register an Organization and Request Access

Welcome to Transfer Payment Ontario: How to Register an Organization and Request Access.

There is a decorative compass on the title page.

For optimal learning experience and best performance, turn your audio on. For this 9 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 webpage is updated, its look may change over time, but the instructions are still valid.

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.

In this video, you will learn how to: Join a registered organization, Register a new Organization, Request access to Transfer Payment Ontario and View and update your organization's information.

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

For new users, there are four steps, to access Transfer Payment Ontario. First, create a ONe-key account; or use your existing one to log in. Register your organization. Then the system will automatically place a request for standard access to Transfer Payment Ontario. Then, you will be able to access the system to submit for funding.

The page is titled 'Register for Transfer Payment Ontario'. The aforementioned steps are listed in bold with numbers inside a blue circle. Under each step, more information is provided on details of the process.

To access our webpage. First, you enter the URL into your browser. We recommend Google Chrome. Type ontario.ca/getfunding. Select 'Log in to Transfer Payment Ontario' or scroll down for instructions, resources, and contact information.

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

A new browser window appears, the URL is entered into the address bar and the webpage appears. The title is '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,'

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.

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

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! Or sign in with GO-secure. GO Secure is used specifically by individuals within the Ontario government and the broader public sector.' Beside the text, there is a yellow-green box allowing users to enter their One-Key ID and Password to Sign In.

If you are logging in for the first time, there will be two options displayed. 'Register New Organization' allows you to register a new organization and create its profile.

Pause

'Join Organization' allows you to search and request access to an organization profile that is already registered in Transfer Payment Ontario.

The request will be sent to the administrator of your organization's Transfer Payment Ontario account for their approval. Before you begin, see if your organization is already registered.

Select 'Join Organization'.

The mouse selects the 'Join Organization' menu card.

Two options labeled 'Register New Organization' and 'Join Organization' appear with associated icons. Text underneath 'Register New Organization' says, ' Search organization, provide organization profile information, validate CRA BN and complete registration'. Text underneath

'Join Organization' says, 'Search organization registration, provide information to request access to registration'.

On the Organization Search page, enter your organization's legal name or, CRA business number, or registration ID to initiate the search. Select the 'Search' button and review the search results. If your organization appears in the list, select it, then select 'Join Organization'.

The hand selects Search, then Join Organization.

The page is titled 'Organization Search'. Beneath, the text states the three search options as aforementioned. Following, there are mandatory fields to fill in based on the chosen search option. Three blue buttons give options of 'Cancel', 'Reset', and 'Search' after the fields. After selecting 'Search', the Search Results appear with a list of organizations. After selecting an organization, select the blue button with 'Join Organization' to complete the process.

Organization details will be displayed If all details correspond to your organization, select 'Confirm'.

The mouse selects the 'Confirm' button.

The page is titled 'Join Organization' with bullet points beneath stating, 'Review the information below', 'select Confirm to proceed. An email notification will be sent to the administrator(s) for approval', and 'If this is not your organization, click Back to return to Search'. A section titled 'Organization Details' shows details of the organization and another section beneath titled 'Requestor Contact Information' shows contact information of the requestor. At the bottom of the page, there are two blue buttons displaying 'Back' and 'Confirm'.

On the confirmation page, ensure the Administrator information is correct. It is the administrator who has to approve your request to join the organization. If any of this information is incorrect, please contact the Transfer Payment Ontario's Client Care Team. Select 'Done' to continue.

The mouse selects the 'Done' button.

The page is titled 'Join Organization Confirmation' with sections 'Administrator(s) Information', 'Organization Details', and 'Requestor Contact Information'. Beneath each section are corresponding details regarding the topics. At the bottom of the page, there are two blue buttons stating 'Done' and 'Print'.

After your access is approved by the current administrator, An automatic request will be sent out the client care team in order to provide you with the required access to explore funding opportunities that are available.

If your organization is not registered, select cancel. Then select 'Register New Organization'.

The mouse selects Cancel, and the Home page appears. Then it selects 'Register New Organization'.

On the same page as Organization Search, there is a black menu bar at the top of the screen with icons symbolizing different options. The profile icon is selected in this case to reveal a drop-down menu. The choices on the menu include: Profiles in Organization, Register New Organization, Join Organization, View/Update Organization, Organization Users, Approve User, and Track Change History.

There are four steps to completing a new registration. Step One: enter Organization Profile details. Mandatory fields are marked with an asterisk. When complete, select 'Save and Continue'.

The mouse scrolls over the first step stating 'Organization Profile' and scrolling down to show subsequent fields. Once sections are completed, it selects 'Save and Continue'.

The page displays a timeline of subsequent steps. The first step on the screen is shown, titled Organization Profile. The mandatory fields following are 'Essential Information', 'Registered Charity', 'Not for Profit', 'Business Information' and 'Additional Information/Annual General meeting Info (optional)'. At the bottom of the page, there is a blue button stating 'Save and Continue'.

At Step Two, enter your organization's address, either manually or look up via postal code, then select 'Confirm'.

The mouse scrolls over step 2, and then going to 'Address Look Up via Postal code' and selecting the hyperlink to search. After, it selects 'Confirm'.

The screen shows the second step titled 'Address'. Sections beneath are titled 'Business Address' and 'Address Details' with corresponding blank fields. A hyperlink under Business Address allows users to look up a valid postal code to fill in the fields. At the bottom of the page, there are two blue buttons stating 'Back' and 'Confirm'.

Complete the Mailing Address section, then select 'Save and Continue'.

The mouse uses the scroll bar to scroll to Mailing Address section. After, it selects 'Save and Continue'.

The sections are titled 'Mailing Address' and 'Restricted Address' with corresponding fields related to address details. At the bottom of the page, there is a blue button stating 'Save and Continue'.

Step Three: add organizational contacts. You are required to provide at least one. Select 'Add Contact'.

The mouse scrolls over step three, then selects '+Add Contact'.

The screen shows the third step titled 'Contacts'. The following section is titled 'Organization Contact List' with text repeating the aforementioned information. A grey box will display the list of contacts, and it is currently shown as 'No Contacts'. There are two blue buttons stating '+Add Contact' and 'Save and Continue'.

Complete all required fields including the Contact Type, reviewing each one's description. Then select 'Save'.

The mouse scrolls through all the sections, and then selecting 'Save'.

After selecting '+Add Contact', a new page is displayed with sections beneath titled 'Official's Name', 'Contact Position Details', 'Contact Type', 'Administrator(s) Information', and 'Contact Address'. Within each section are respective fields to fill out. At the bottom of the page, there is a blue 'Save' button.

To add more contacts, select '+Add Contact' and repeat the previous steps. When ready, select 'Save and Continue'.

The mouse scrolls over 'Active Contacts', then selects 'Save and Continue'.

After at least one contact has been added, the page will list between 'Active Contacts' and 'Inactive Contacts'. At the bottom of the lists, there are two blue buttons with text '+Add Contact' and 'Save and Continue'.

Step four: Review & Submit Take the time to review everything before submitting your registration. To edit the information entered, select an icon to quickly navigate to the right section. Remember to save after making any changes. Review the declaration at the bottom, and select 'Submit Registration'.

The mouse scrolls to the bottom of the page and checks the declaration box. Then, it selects 'Submit Registration'.

The screen shows the fourth step, titled 'Review and Submit'. Beneath, there is text labeled 'Registration Summary, Below is the registration you have entered. If updates are required, use the Registration Menu or click Back. Click Submit Registration to submit'. Beneath, there are filled sections labeled 'Registration Information', 'Organization Profile', 'Address', and 'Organization Contact List' with information you have filled out. Near the bottom, there is a Declaration and a check box to certify you agree with the statements. At the bottom of the page, there is a blue button labeled 'Submit Registration'.

If your organization does not have a business number, you are asked to complete this CRA Program Account checklist, then select 'Submit'. If your organization does have a CRA business number, the system uses the CRA business directory to validate the information provided. Contact the Client Care Team to resolve validation issues.

The mouse checks off the list, then selects 'Submit'.

A new page appears, titled 'CRA Program Account Check List' under the circumstance that a business number was not provided. Beneath, text says, 'Please ensure that you have answered the questions below to the best of your knowledge. These questions will help to confirm that your organization does not have a CRA Business Number. For further information on the CRA BN, please refer to the Canada Revenue Agency website.' The checklist is split into two parts, with the first asking 'Is your organization: incorporated, a charity organization, an air carrier that charges the air travelers security charge, and brokers or agents who place contracts of insurance'. The second part asks 'Does your organization', with questions beneath relating to organizational activities. At the bottom of the page, there are three blue buttons labeled 'Back', 'Clear', and 'Submit'.

Once your registration is validated, a Registration Confirmation page will appear. Note your Registration ID, and your status is 'Complete'. Select 'Done'. Once your registration has been approved, you will receive an email from Transfer Payment Ontario.

The mouse hovers over Registration ID, Status, then scrolls to the bottom and selects 'Done'.

A page titled 'Registration Confirmation' appears. Beneath, there is a section titled 'Registration Information' with filled fields giving your Registration ID and Status. Sections below are titled 'Organization Profile', 'Address', and 'Organization Contact List' filled out respectively. At the bottom of the page, there are two blue buttons labeled 'Done' and 'Print'.

When you have registered or joined an organization, the Home Page will display two menu cards: 'View/Update Organization' and 'Request TPO Service'. Select 'Request TPO Service".

The mouse selects the 'Request TPO Service' menu card.

A request for standard access to funding opportunities is submitted for new organizations automatically. View its status at the bottom of the page under "Current Requests".

Mouse points to Current Requests.

If you are instructed to request a specific type of access, complete these fields. Then select the 'Request' button and it will be processed within 5 business days.

The mouse selects the necessary information from each section, then selects the 'Request' button.

Ensure your organization's information is updated regularly, as it's used to populate sections of your submission, report forms and contract documents. Only Admin users can update the information for your organization. To do so, select the 'View/Update Organization' menu card on the Home page.

The mouse selects 'View/Update Organization'.

Back on the Home page, 3 menu cards give the choices of 'View/Update Organization: Search Organization, View, and Update registration information', “Request TPO service” and 'See Funding Opportunities: Get funding, submit a report, approve a contract and track progress'.

Select the name of the organization you want to update. Draft registrations can be deleted, but not once your registration is submitted or complete.

The mouse scrolls over the status of the registration, then selects the hyperlinked legal name of the organization.

The page is titled 'View/Update Registration'. Below, there is text stating, “Organization List: You are linked with the organization(s) below. Click on the organization's Legal Name to access the organization's profile information'. There is a list of records displaying each organizations Legal Name (hyperlinked), CRA Business Number, Operating Name, Status, Last Modified, and Delete Organization. Under 'Delete Organization', there may be a blue button labeled 'Delete Organization' depending on the status of the registration.

Navigate through each section. Make any changes necessary, then select 'Save'.

The mouse scrolls through the choices of categories.

The page is titled 'Update Organization'. There is a timeline displaying 'Organization Profile', 'Address', 'Contacts', and 'Documents (Optional)'. The page is currently displaying the 'Organization Profile' section. Below, there is text stating, 'Organization Profile: This page provides an Organization's Profile information. A registration will remain in draft or submitted status until a Canadian Revenue Agency Business Number (CRA BN) has been provided and validated. For further information on the CRA BN, pleaser refer to the Canada Revenue Agency website', A section is titled 'Organization Profile', with another subsection 'Essential Information' below.

To update a contact, select its name hyperlink.

The mouse selects a hyperlinked name of a contact.

The page displays the Contacts section. There is text stating, “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 Contact or Next to continue. To view and/or update an existing contact's information, click on the Name'. Below the text, there is a list of Active and Inactive contacts. At the bottom of the page, there are three blue buttons labeled '+Add Contact', 'Save and Continue', and 'Back to Organization List'.

You can also deactivate a contact by selecting the Inactive status, then Save.

The mouse scrolls over the Status options, then selects 'Save and Continue'.

After selecting the name of a contact, a page appears with text displaying, 'Contact Position Details: Position Title, Department', 'Contact Type: Senior, Payment, Other', and 'Status: Active/Inactive. At the bottom of the section, there are two buttons labeled '+Add Contact' and 'Save and Continue'.

In the Documents section, you can add, view, and archive organization documents. Select '+Add Document' to upload documents.

The mouse selects '+Add Document'.

The page displays the fourth section titled 'Documents'. There is text stating, 'Organization Documents: To view/download the document, click on the File Name below. Displaying Active Documents'. Below, there is a section where active documents are listed. Beneath that are three blue buttons labeled '+Add Document', 'Archive Document', and 'View Archive List'. At the bottom of the page, there is a blue button labeled 'Back to Organization List'.

Enter a document title and document category. Choose the file from your computer. Then select 'Save'.

The mouse selects a file from the computer, completes the necessary fields, and selects 'Save'.

A section titled 'Add Document' is shown with the fields 'Document Title' and 'Document Category' underneath. There is a button labeled 'Choose file' to add a file to upload. Beneath, there are two blue buttons labeled 'Cancel' and 'Save'. At the bottom of the page, there is a blue button labeled 'Back to Organization List'.

Then select 'Confirm'.

The mouse selects 'Confirm'.

The page displays your document details as previously filled in. There are two blue buttons labeled 'Back' and 'Confirm'. At the bottom of the page, there is a blue button labeled 'Back to Organization List'.

A document can be archived when no longer valid or required. Select the document from the list, then 'Archive Document'.

The mouse selects an active document, then selects 'Archive Document'.

On the Organizations Documents page, there is a list of active documents. Below the list, there are three blue buttons labeled '+Add Document', 'Archive Document', and 'View Archive List'.

And a document can be made active again. Select 'View Archive List'. Select the document, then 'Restore Document'. All active documents will be attached to your funding submission.

The mouse selects the document it wants to restore, then it selects 'Restore Document'. After, it selects 'Back to Organization Documents'.

The page displays a list of archived documents. Beside each document, there is an checkbox to select it. At the bottom of the list, there are two blue buttons labeled 'Back to Organization Documents' and 'Restore Document'. At the bottom of the page, there is a blue button labeled 'Back to Organization List'.

In this video, you learned how to: Join a registered organization, Register a new Organization in Transfer Payment Ontario, Request access to Transfer Payment Ontario and View and or update your organization's information. Thank you for watching.

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