

Full Text Version of:

Transfer Payment Ontario: How to Register or Join an Organization

Welcome to Transfer Payment Ontario: How to register or join an organization

This video has 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.

The application's look may change over time, but the instructions are still valid.

In this video, you will learn how to:

Join a registered organization, and

Register a new organization.

For new users, there are four easy steps to access Transfer Payment Ontario.

First, create a My Ontario account, and use it to log in.

Then, register your organization.

Then the system will submit your request and email you when processing is complete.

Then you can submit for funding.

To access our webpage, 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.

Use your My Ontario Account to log in to Transfer Payment Ontario. If you do not have a My Ontario Account, you can create one. See our webpage for instructions.

If you are logging in for the first time, there will be two options.

'Register New Organization' lets you register a new organization and create its profile.

'Join an Existing Organization' lets you search for and request to join an organization that's already registered with Transfer Payment Ontario.

We'll begin by selecting 'Join an Existing Organization'.

On the Organization Search page, enter your organization's legal name, CRA business number, or registration ID.

Select Search, and review the results.

If you found your organization, select it, then 'Join Existing Organization'.

Review the organization details.

If all details correspond to your organization, select 'Confirm', and your request to join will be sent.

Ensure the administrator information is correct. It is the administrator who will review your request to join the organization.

If any administrator information is incorrect, refer to the bottom of our webpage and contact the Transfer Payment Ontario Client Care team.

Select 'Done'.

To enter details for a new organization, select 'Register New Organization'.

Search for the organization first to ensure that it has not been registered already.

If your organization does not appear, select 'Click here to register'.

There are seven steps to registering an organization.

Step one: enter the Organization Profile.

Read about sub-organizations, and if this applies, check 'I am registering a sub-organization'.

Most of these fields are required.

When complete, select 'Save and Continue'.

At Step two, enter your business address.

Organizations require a valid Business and Mailing address to successfully register with Transfer Payment Ontario.

However, if providing your organization's address poses a security risk, as it can for certain family shelters, select Restricted Address to prevent it from being shared publicly.

When complete, select 'Save and Continue'.

Step three: add organization contacts. You are required to provide at least one.

Select 'Add a Contact'.

Complete all the required fields, providing the contact's position and type.

Select 'Add Contact' and repeat the previous steps as needed.

When ready, select 'Save and Continue'.

Step four: Tax Compliance Verification (TCV)

Organizations have the option to complete the attestation of compliance.

Review the requested information and fill out the fields.

Otherwise, if not applicable select 'Skip this section'.

When complete, select 'Save and Continue'.

Step five: Annual General Meeting (AGM)

Organizations have the option to provide additional info.

Review the requested information and fill out the fields.

If not applicable, select 'Skip this section'.

When complete, select 'Save and Continue'."

Step six: Documents.

Organizations can upload documents to support their transfer payment activities.

Documents uploaded can be viewed by the ministry and supplement any further submissions for funding.

Select 'Add Document', upload a file from your device, and select 'Save'.

When complete, select 'Save and Continue'."

Step seven: Review & Submit.

Take time to review everything before submitting your registration.

To update information, just select the icon to jump to the right section, and remember to save after making changes.

Download a copy of your submission by selecting the 'Submission summary (PDF)'.

Review the declaration at the bottom, indicate if you agree, and select 'Complete Registration'.

Your submission Status will be updated, and Registration ID shown.

Transfer Payment Ontario will email you when it reviews and approves your request.

If you indicated the organization does not have a CRA business number, you will be asked to complete the CRA Program Account Check List.

After the organization registration or request to join has been approved, users gain standard access to Transfer Payment Ontario.

If you have been instructed to request a specific type of access, or if you wish to review your request status, select Request TP Service.

Organizations are responsible for updating its information regularly, as their becomes part of your submissions, reports and contract forms.

Organization administrators can update address, contacts, organization documents and more.

Just select 'View/Update Organization' on the home page.

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Thank you for watching.