Full Text Version of:

Transfer Payment Ontario: How to submit for funding

Welcome to Transfer Payment Ontario: How to submit for funding.

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

For an optimal learning experience and best performance, turn your audio on. For this 10 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.

The speaker icon is shown in a system tray.

In this video, you will learn how to Log in to Transfer Payment Ontario, Submit for funding opportunities, and Track your submission.

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

Transfer Payment Ontario provides one-window access to apply for program and funding opportunities, and track the status of your submission. To access our webpage, first you enter the URL into your browser. [http://ontario.ca/getfunding] We recommend Google Chrome. Select your language from the top right corner, and then log in, scroll down for instructions, resources, and contact information. When ready, select Log in to Transfer Payment Ontario. [a hand appears and selects the log in button]

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, 1 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. If you don’t have a one-key ID, sign up here. Or, if you already have a Go Secure account, use it, to access the system. [the hand indicates each login area, then selects the Sign In button]

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.

If you are signing up for the first time, create your account. Complete all mandatory fields, and select Submit. [the hand shows the required fields are First name, Last name, and Email Address are required. Invitation Number is not.]

Text on this page says Transfer Payment Account and repeats the advice just stated.

To submit for funding, you either register a new organization, or Join an organization that's already been registered. Find instructions for both these options on the Transfer Payment Ontario website. [the hand moves to the two options, but does not select either, then the image fades to the next screen.]

Two options appear with decorative images, and these words, 'Register New Organization. Search organization, provide organization profile information, validate CRA BN and complete registration. Join Organization. Search organization registration, provide information to request access to registration.'

Once you have registered or joined an organization, you can view or update its information, request access or view the status of a request for Transfer Payment Ontario, and see funding opportunities. It's important that your organization details are updated. Some of them will appear on the submission form, so correct any errors here first. If you are not the administrator of your organization's profile, you cannot edit its content. Once you have verified the organization's information, select See Funding Opportunities. [the hand selects See Funding Opportunities.]

Two 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.'

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 request for funding. [the hand selects the organization.]

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.

Now that you've selected an organization, here are the things you can do. There are navigational tools in the top-right corner. Each has a tool tip that says what it does; Return to the home page, Return to the I am looking to page, Communications, A Chat Bot where you can ask questions at any time, Contact information for more help A user profile menu, and Log out. Now, let's find an opportunity and submit for funding. [the hand selects Submit for Funding]

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.

Funding opportunities your organization has been specifically invited to apply to, are located in the Invitational Programs tab. All available funding opportunities are located, in the Open Programs tab. They are displayed like card, or as a list. [the hand selects List]

There are two tabs, Invitational Programs for my Organization, and Open Programs. To the top-right of the opportunities are links to display them in a Card or List format. This page shows open programs as cards with an image, ministry acronym, and opportunity name. Eight are shown with an arrow underneath.

Search using the Query tool, Or just browse. To submit for funding, select the action New. [the hand selects the word New for one of the programs.]

This page is called Submit for Funding, but has the two tabs, Invitational Programs for my Organization, and Open Programs. In the top-right of the opportunities are links to display them in a Card, List, and Query. This page shows open programs in rows with Action, Program (name) Submission Deadline and Classification for each. Eight are shown with navigation links below.

If your organization, has already started a submission for a program, the system will display the list of drafts initiated. Select the Case Number, to open and complete the submission. [the hand moves to the Case# column and selects one]

This page says Important Reminder Before You Get Started, and that your organization has already created 3 unsubmitted drafts for the program Celebrate Ontario 2019. Do you want to start a new submission or continue working on one of your existing drafts? This is followed by a Start New Submission button, and a list of submissions labeled Or Select A Draft To Continue Working. Below that is instructional details labeled How To Manage My Drafts?

New submissions begin on the first of four steps. Here you Review Program Information. Your submission is described on the right. Especially important is the unique case number, so you can reference and track your submission. Review all the program related documents available for download. [the hand scrolls down.]

The page is labelled Submit for Funding, with the program name, and the four steps illustrated with numbered labels across the top: 1 review program information, 2 complete form, 3 attach supporting documentation, 4 confirm submission. Step 1 Review Program Information page reports the submission's program, case, date created, status and deadline on the right. It lists documents with names and comments, and includes the instruction to download the file, plus further instruction labeled Problems Downloading?

At the bottom of the page are attachments that may be required. When you've finished reviewing everything, select Next. [the hand selects Next]

Text above the list of attachments states each attachment is identified as either mandatory or optional, more information on completing this requirement can be found in program documentation provided by the ministry.

In Step two, you download and complete the application form. We recommend using Adobe Acrobat Reader DC and disable your browser pop-up blocker. You can find troubleshooting tips for problems with downloading here as well. [the hand selects the Download Form button]

Advice at the top of the page recommends using Adobe Acrobat Reader DC to fill out the PDF form, with a link provided. Under the four-step graphic it states Download the Form to Get Started, followed by instructions to save the form on your computer, and upload it at step 3, plus instructions labeled Problems Downloading? Select Download.

A popup confirms your action, showing Download and Cancel buttons.

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.]

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.

Work on your application from anywhere. You don't need to be logged in to the Transfer Payment Ontario system. Share the file with others as you wish. Navigate to any section quickly, using these tabs. Select the Expand button to view and complete all sections of the form. If any organization information on the form is incorrect, delete the form, fix them from the Home page after selecting View/Update Organization, and download the form again. Once you have completed all the sections, select Validate. [the hand selects Validate.]

The form says Application, with Program name, and case number, followed by a table of links to the 14 sections. Section A shows detailed instructions, and the remaining sections are not shown.

If all the mandatory fields are completed, the form will validate successfully. Anything that's missing is reported here. Add the missing information and validate the form again. 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.

A dialogue box appears saying validation completed successfully. Behind it, it appears the form is on the last section and is completed.

To upload your validated form, log in to Transfer Payment Ontario, select See Funding Opportunities. Select your case number from the list in the See My Funding History option, or from those Recently Viewed… [the hand selects each item.]

Images of the pages and selections appear. …and return to the Step 2 page called Complete Form.

Step 1 is not shown in the video. The Submit for Funding page appears, on Step 2. Scroll down and select the Upload Form button.

The bottom of Submit Funding Step 2 is labeled Upload Your Completed Form, provides instructions and detailed advice labeled Problems Uploading. The is an Upload button, and a Next button.

To upload the application, select the look-up icon in the File Name field. [the hand selects it.]

The bottom of Submit Funding Step 2 now shows a File Name and a Comments field.

Choose a file. [the hand selects the Choose File button.]

A pop-up window labelled Add Attachment appears saying Please specify a File Name or URL.

Locate the saved Application Form on your computer and select Open. [the hand selects Open.]

A browser window displays files in the computer's download folder, with an Open button and Cancel button.

Select Upload. If there are any problems, review the tip box below. After upload is complete, the system moves you to Step 3. [the hand selects the Upload button.]

On the bottom of Submit Funding Step 2, the File Name field contains the name. Below that is the detailed advice labeled Problems Uploading.

Step 3 is for attaching supporting documents. These were mentioned at Step 1, and they are listed here again. When you've prepared attachments to upload, scroll down… [the hand scrolls down]

Submit Funding Step 3 is called Attach Supporting Documents. The Review Supporting Attachments section contains instructions and a table of attachment types. Below that is the Upload Support Attachments section.

…select New, and locate the attachment on your computer as you did for the application.

The middle of Submit Funding Step 3 shows the Upload Supporting Attachments section, the instructions, and a table of documents already uploaded. Below that is the Review Organization Attachments section. Below that are the Next and Back buttons. Uploading is not shown.

For each upload, record the Attachment Type. Select the look-up icon. [the hand selects it.]

The table of documents shows a new row with a file named with a blank Attachment Type field.

...and select which type of attachment this is, then select OK. [the hand selects Previous Year Financial Statement and OK.]

An Attachment Types list appears with these options: Confirmation of Revenues and Expenses, Financial Statements, Other, Previous Year Financial Statement, Reports and Publications, Summary Invoices.

Select anywhere outside the active box outlined in red or press Ctrl+S on your keyboard, to save your entry. Here we've attached a financial statement. Your application also appears here as uploaded. Any documents attached to your organization profile are listed below. Add or Modify them at View/Update Organization, from the Home page. Select the next button to continue. [the hand selects Next.]

The bottom of Submit Funding Step 3 shows the Review Organization Attachments section, with instructions and a table to display the attachments.

Step 4 is the final step where you confirm the submission is complete. If any attachments were missed, a warning directs you. When you've met all the requirements, select the Complete Submission button.

Submit for Funding Step 4 provides instructions and addresses problems submitting, and provides the Complete Submission button, and reports the submission's program, case, date created, status and deadline on the right. The status is now Draft.

A confirmation message appears. Note the status of your submission changes, from draft, to submitted. No other changes can be made once the status changes to submitted, except attaching additional documents as needed. And, we always welcome your Feedback. 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 the second tool at the top.]

Submit for Funding Step 4 displays Application Successfully Submitted, with a confirmation message, a Give Feedback button, a Back Home button, and reports the submission's program, case, date created, status and deadline on the right. The status is now Submitted.

Then select See My Funding History. [the hand selects that.]

This is the I am looking to page. When last visited we selected Submit for Funding. 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.

Your submission or case is listed in this table. Drafts are shown as well. To open a case, select the Case number. [the hand selects the one just submitted.]

See My Funding History's first section is My Organization's Cases, followed by a table showing New, Case number, Program, Status, and Opened date for each one. There's a query tool top-right, and navigation links beneath.

You can track your submission, add and view attachments, or, you can create assistance requests to our help desk. [the hand selects the first tool at the top.]

The See My Funding History page now shows 6-part tracker where the progress is indicated by darkening a part. The parts are Received, Review, Approval, Contract, Monitor, and Closed. Below that attachments are listed in a table with New and Query tools on its top right. Below that is a table for assistance requests, also with two tools on its top right: Create Assistance Request and Query. On the right side of the page is the section that reports the submission's program, case, date created, and date closed.

In this video, you learned how to Log in to Transfer Payment Ontario, Submit for funding opportunities, and Track your submission. Thank you for watching.

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