Full Text Version of:

How to Navigate Transfer Payment Ontario

There is a decorative compass on the title page.

Welcome to Transfer Payment Ontario: How to Navigate the Transfer Payment Ontario system.

The speaker icon is shown in a system tray.

For an optimal learning experience and best performance, 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 the webpage is updated, its look 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

Log into Transfer Payment Ontario, and understand and navigate the Transfer Payment Ontario system.

The background header of the page consists of various financial accessories. The text section is titled 'Get funding from the Ontario government: Find out what funding your organization could receive from the Ontario Government and learn how to register with Transfer Payment Ontario'. Below, there is a blue button labeled 'Log in to Transfer Payment Ontario'. At the bottom of the page, there is a section titled, 'On this page: Overview, Register for Transfer Payment Ontario, Available funding, Get help, Contact us'.

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. 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

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. When creating your One-Key account complete all the mandatory fields, enter your e-mail address and select Sign Up.

Mouse selects Sign Up Now button.

The page is titled 'Transfer Payment Ontario'. Beneath, the text says "One Key Account Registration" On the side of the page, there is a yellow-green box with input fields for One-Key account registration info. At the bottom of the page, there is a Sign up button displayed.

The mouse shows the required fields under Create your ID and Password, and Password Recovery Info.

The page is titled 'Transfer Payment Ontario'. Below, the text states, Confirmation message. At the bottom of the section, there is a red button stating 'Continue'.

You'll receive a confirmation message. Select continue.

The mouse selects continue.

The page is titled 'Transfer Payment Account'. Below, the text states, 'To create your Transfer Payment Account, provide the information required and click the 'Submit' button. Note: all fields marked with an asterisk (*) must be completed.' Following that are 6 fields. At the bottom of the section, there are two blue buttons stating 'Clear' and 'Submit'.

If you are signing in for the first time, create your Transfer Payment account. Complete all mandatory fields, and select Submit.

The mouse shows the required fields are First name, Last name, and Email Address are required. Invitation Number is not.

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'.

Then, you will see two options: Register New Organization and Join Organization. Once your organization is registered, the system will use your organization's information for your submissions for funding opportunities as well as for funding agreements. Find instructions for both these options on the Transfer Payment Ontario website.

The banner at the top of the menu cards, displays messages containing notifications and pending activities. Select the banner to display these messages the mouse moves to the Messages banner, but does not select it

And, select the User Menu on the top right corner to see additional options for your account.

The mouse moves to the two options, but does not select either, then the mouse clicks on the profile icon, showing the drop-down list.

On the same page as before, there is a black menu bar on the top of the page with a house icon, a chat icon, a question mark icon, and profile icon, and a sign-out icon.

The image changes as if you registered or joined an organization.

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'.

Once you have registered or joined an organization, the home screen will display these options; View/Update Organization, Request a TPO Service, and See Funding opportunities It is important that your organization's details are correct. Some of them appear on the funding application, so correct any errors here first. If you are not the administrator of your organization, you cannot edit its content. Once you have verified the organization's information, select See Funding Opportunities.

The mouse 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. Select the organization for which you are submitting a request for funding.

The mouse selects the organization.

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.

This landing page is about your funding opportunities. Here's what you can do. Recently Viewed records are displayed on the right side as hyperlinks. Options are located in the centre of the screen, like menu cards. Navigational tools are located in the top-right corner. Each tool tip says what it does. Home takes you back to the home page.

The mouse scrolls over 'Recently Viewed', then selects the Home icon on the top menu bar

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 'I am Looking to' page, is the landing page, where we just were.

The mouse selects the "I am looking to" icon

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.

Select the Communications icon and this will take you to a list of all system-generated communications sent to your organization by funding ministries.

The mouse points to the grid icon, then selects the Communication icon.

The page is titled 'Communications'. Below is a listed chart with categories of 'Case #, Date, Subject Info, Body'. There is also a Query option above the listed graph.

The mouse selects the Communications icon

On the 'I am Looking to' page, a small window pops up titled 'Welcom to GoBot'. In this window, the user is able to chat with an AI bot for assistance.

Select the Chat Bot, and a window will pop up, where you may input questions for assistance at any time.

The mouse selects the chat icon

Select My Assistance Requests for the support page, where you are able to create new assistance requests to the TP Ontario Client Care Team and view help links.

The mouse selects the My Assistance Requests icon

The page is titled 'Support'. Beneath, there is a section titled 'My Assistance Requests' with a list of assistance requests. Under that, another section is titled 'Help Links' with a list of help links. Select the My Profile icon...

The hand selects My Profile

The page is titled 'Manage Account'. There are five menu cards with decorative images, labeled, 'Update my Organization Profile', 'View My Organization's Users', 'Update My User Information', 'Manage My Related Organizations', and 'Manage My Sites'.

This will allow you to view or edit personal and organizational information. And, select the Log Out icon...

The mouse selects the My Log Out icon

On the 'I am looking for' page, selecting the Log Out icon will take the user back to the One-key login page, as previously described.

This will log the user out of the Transfer Payment Ontario system and bring you back to the One-key login page.

The mouse selects the Cancel icon

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.

Now let's explore the functionality of the menu cards, starting with Submit for Funding.

The mouse scrolls over each menu card, then selects Submit for Funding

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.

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 menu cards, or as a list.

The mouse selects List.

The page is titled 'Submit for Funding'. There are two tabs beneath labeled 'Invitational Programs for my Organization' and 'Open Programs'. Below each tab, there are lists of programs that are available to apply for. The first column of each list is labeled 'Action', where below is a list of 'New' in hyperlink to begin an application process.

Search using the Query tool, Or browse the whole list using the navigation links.

Mouse points to navigation options First, Previous, Next, Last but does not select them.

To submit for funding, select the action New.

The page fades back to the “I am Looking to” page

The page is titled 'Submit Report to Ministry'. Beneath, there are three tabs labeled 'Outstanding Report Backs', 'Report Back By Case', and 'All Report Backs'. Currently on the 'Outstanding Report Backs' page, it shows a list of outstanding report backs. Under the 'Type' category of the list, the type of report is hyperlinked for users to click and submit a report.

The Submit Report to Ministry page shows a list of reports required by funding ministries. Select a report's type and follow instructions to report to a Ministry.

The mouse shows the page, then goes back to the home page and selects 'See My Payments'

The page is titled 'See My Payments'. Beneath, there is a description stating, 'Payments scheduled or received for my organization'. Below that, there is a list of your organization's payments.

The See My Payments page displays your organization's scheduled and received payments. the mouse shows the page, then backs to home page and selects 'See My Funding History

The page is titled 'See My Funding History'. The description below states, 'Cases from my organization's Draft, Submitted, Active, or Closed statuses. Under is a section titled 'My Organization's Cases' with the list of cases. The category 'Case #' of the list is hyperlinked.

The See My Funding History page displays your organization's cases. Select a case number to track your submission, or add a document to an existing case following the instructions on the page.

The mouse shows the page, then goes back to the home page and selects 'See My Repayments'

The page is titled 'See My Repayments'. The description below states, 'Repayments outstanding or received for my organization'. There is a section titled 'Repayments' and a list of your organization's repayments.

The See My Repayments page displays any pending or received repayments from your organization the mouse displays the page, then goes back to the home page and selects 'Approve Contracts'

The page is titled 'Approve Contracts'. There are two tabs under labeled 'Contracts Pending Approval' and 'Approved Contracts'. Under the first tab, there are sections labeled, 'Step 1: See Contract Information', 'Step 2: View Contract', 'Step 2a: Attach Contract', and 'Step 3: Approve or Return the Contract'. Each secton has corresponding information to fill in or show.

Manage My Contracts has two tabs for your organization's contracts: one for reviewing and providing your approval, and one for previously approved contracts.

The mouse displays the page, then selects the Profile icon on the top menu bar

The page is titled 'Manage Account'. There are five menu cards with decorative images, labeled, 'Update my Organization Profile', 'View My Organization's Users', 'Update My User Information', 'Manage My Related Organizations', and 'Manage My Sites'.

Select My Profile to review and update organization and user information. There are five activities on this page. Let's go through each one.

The mouse scrolls over each menu card, then selects 'Update My Organization Profile'

The page is titled 'Update My Organization Profile'. There is a section labeled 'Mailing Address' underneath with fields related to address entry.

Update My Organization Profile allows you to review and edit organizational information. If you are not the administrator of your organization's profile, you cannot edit this content.

The mouse shows the page, then backs to the Manage Account page and selects 'View My Organization's User's'

The page is titled 'Update My User Information'. The description below states, 'All fields marked with an asterisk (*

View My Organization's Users shows a list of users that have access to the organization profile.

The mouse shows the page, then backto Manage Account and selects 'Update My User Information'

The page is titled 'Update My User Information'. The description below states, 'All fields marked with an asterisk (*). Below are fields labeled 'User ID, First Name, Last Name, Salutation, Address 1, Address 2, City/Town, Province', and other personal information fields.

Update My User Information allows you to update personal contact information. the mouse shows the page, then backs to Manage Account and selects 'Manage my Related Organizations'

The page is titled 'Manage My Related Organizations'. Beneath are two buttons, one blue and one grey labeled 'Request Change' and 'Request New'. Under the buttons is a form to fill out regarding the report, with fields such as Name, Site Type, and Address.

Manage My Related Organizations allows you to fill out monthly participation reports. It is used by a limited number of specific programs and users. the mouse shows the page, then backs to Manage Account and selects 'Manage My Sites'

The page is titled 'Manage My Sites'. Beneath are two buttons, one blue and one grey labeled 'Request Change' and 'Request New Site'. Under the buttons is a form to fill out regarding site changes. There are two blue buttons labeled 'Expand All' and 'Collapse All', with site fields such as Site Asset Information below.

Manage My Sites allows you to request ministry approval of a new site or request changes to an existing site. It is also used by a limited number of specific programs and users.

The mouse shows the page, then goes to final slide

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

In this video, you learned how to: Log into Transfer Payment Ontario and understand and navigate the Transfer Payment Ontario system. Thank you for watching.