

# Registering an organization

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## Document summary

This document outlines how to register a new organization in Transfer Payment Ontario.

## Before you begin

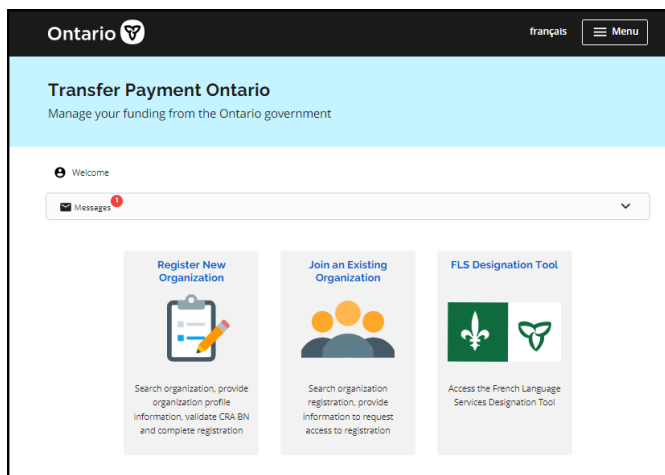
To register your organization will need:

- your **Canada Revenue Agency Business Number** (CRA BN), if you have one (if you do not have a CRA BN you will need to confirm this by completing the CRA Program Account Checklist as part of your registration process.)
- the **legal name of your organization** that's printed on official documents (for example, articles of incorporation or registered business applications)

- the **operating name of your organization** (your business name commonly used by your clients)
- **contact information** for at least two contacts within the organization, including one senior contact with signing authority (for example, a director, controller or CEO and another member of your organization)

## Registering an organization

1. Sign in to Transfer Payment Ontario using a Google Chrome web browser.



2. Select **Register New Organization**. If the card is not on the home page, select your **Menu** and select **Register New Organization**.

### Organization Search

- Before you register your organization, please search for your organization by Legal Name, Operating Name or Canada Revenue Agency Business Number (CRA BN) to determine if your organization is already registered.
- If your organization is listed in the search results your organization is already registered.
  - Select the organization and click Join Existing Organization.

**Search By**

☐ Legal Name or Operating Name

☐ CRA Business Number

☐ Registration ID

[Cancel](#)

3. Enter your organization's **Legal Name or Operating Name, CRA Business Number, or Registration ID**.
4. Select **Search**.

**Note:** If the error message “*Search results too large. Please refine your search.*” appears, please perform a new search with refined keywords or information. Select **Search** again.

- If your organization appears in the search results list, then it is registered. Please do not register your organization again. Joining instructions are available on [ontario.ca/GetFunding](https://ontario.ca/GetFunding).
- If your organization does not appear in the list, it must be registered.

Cannot find your organization? [Click here to register.](#)

Search Results  
0 Record(s)

Legal Name	Registration ID	Operating Name	Sub-Organization
------------	-----------------	----------------	------------------

5. Select **Click here to register**.

## Step 1: Organization profile

1. Complete the fields on the page.

**Organization Profile**

This page provides an Organization's Profile information. A registration will remain in draft or submitted status until a Canada Revenue Agency Business Number (CRA BN) has been provided and validated.

For further information on the CRA BN, please refer to the Canada Revenue Agency website.

If you do not have Administrator responsibilities, you cannot update your organization profile. Please contact the Admin User within your organization for further assistance. You can find the person(s) in your organization with an Admin User role by navigating to [Organization Users](#).

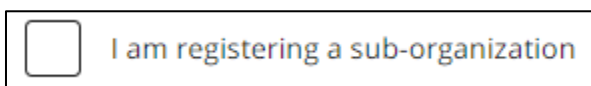
Transfer payment recipients must submit the attestation as part of the selection process prior to entering into new agreements, renewed agreements, or amended agreements for new time-limited and ongoing discretionary funding, unless an attestation has been submitted to the Province within the last year. The Tax Compliance Verification check must be completed and a Tax Compliance Verification number must be provided within the attestation on Transfer Payment Ontario. Please see attestation section for more details

2. Select **Save and Continue**.

## Sub-organizations

A sub-organization is an organization that shares the same legal name and CRA Business Number as another organization but operates under a separate operating name and address.

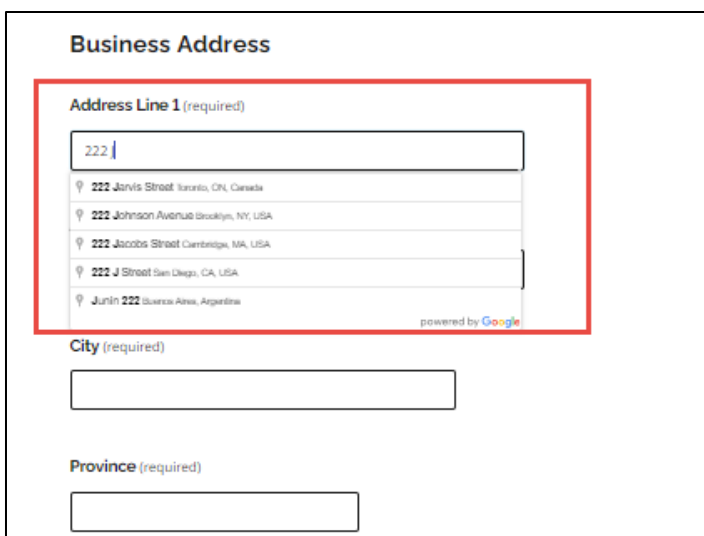
1. Select the **I am registering a sub-organization** checkbox.

A screenshot of a form element showing an unchecked checkbox followed by the text "I am registering a sub-organization". The checkbox is a small square with a thin border.

2. Scroll down then enter the **Parent Organization CRA Business Number**.
3. Select **Search**. If the CRA business number is found, some fields are automatically completed.
4. Complete the remaining fields on the page.
5. Select **Save and Continue**.

## Step 2: Address

1. Enter the business address.

A screenshot of a form titled "Business Address". It contains several fields: "Address Line 1 (required)" with a text input field containing "222" and a dropdown list of suggested addresses; "City (required)" with a text input field; and "Province (required)" with a text input field. The suggested addresses are: "222 Jarvis Street Toronto, ON, Canada", "222 Johnson Avenue Brooklyn, NY, USA", "222 Jacobs Street Cambridge, MA, USA", "222 J Street San Diego, CA, USA", and "Junin 222 Buenos Aires, Argentina". The text "powered by Google" is visible at the bottom right of the dropdown list.

**Note:** As you start typing the address in **Address Line 1**, the system offers a selection of suggested addresses. Select the correct address from the list and the system will automatically fill out the remain address fields.

2. Complete all remaining address information.

**Postal Code** (required)

l3r3m4

**Mailing Address**

☒ Same as Business Address

**Restricted Address (e.g. family shelter, etc.)**

☐ If providing your business and/or mailing address could create a security risk for your organization or its clients, please check here since address information provided on this form may be shared with third parties or made publicly available.

[Back](#) [Save and Continue](#)

3. Select **Save and Continue**.

## Step 3: Contacts

1. Select **+Add a contact**. The screen expands.

**Organization Contact List**

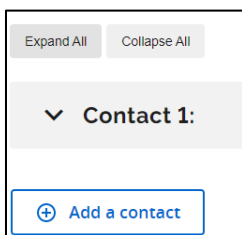
- This page provides a list of an Organization's Contacts. A minimum of one contact is required. However, it is highly recommended that two contacts be provided, one of which is a Senior Contact with signing authority.
- Click "Add a contact" to open a new expansion panel for new contact

[Expand All](#) [Collapse All](#)

[+ Add a contact](#)

[Back](#) [Save and Continue](#)

2. Select the dropdown menu or select **Expand All**.



3. Complete all required fields.
  - a. **Country** code: Enter 1 for Canada.
  - b. **Signing Authority**: If this is selected, the contact will have Transfer Payment Ontario contract signing authority.
4. Repeat for each additional contact.
5. Select **Save and Continue**.

## Step 4: Tax compliance verification (TCV)

Applicable organizations are required to confirm their good standing with tax laws and attest to good standing with labour and environment laws in order to receive transfer payment funding from the Province of Ontario (the Province).

Confirmation of good standing will be shown through the completion of the attestation and the separate tax compliance verification (TCV), which will both be considered before funds are provided. The attestation is part of the registration process. Completion of the attestation can be done at any time and requires the organization to input information from a completed TCV check. Once the completed attestation is submitted, it will be reflected in your organizational profile.

This attestation and TCV must be submitted if the following apply:

- If your organization received cumulative transfer payment funding of \$10 million or above from the Province in the previous fiscal year or is entering into a transfer payment agreement with a contract value of \$10 million or above; and
- Prior to entering into a net-new agreement, an existing agreement that is being renewed or an existing agreement that is being amended to include new time-limited discretionary funding.

The attestation can also be submitted on a voluntary basis. If you are unsure if you need to complete this attestation, check with your ministry funder for more information.

Your organization is only required to submit this to the Province once, prior to entering into a new transfer payment agreement, renewing an agreement or amending an agreement to receive new discretionary funding; and the attestation is valid one year from the date of submission. That means, if you had submitted an attestation a year ago, you will only need to re-


submit (after the previous attestation has expired) if you intend to enter into another transfer payment agreement with the Province (new, renewed, or amended).

If you enter into a multi-year transfer payment agreement with the Province, you will only need to submit the attestation once, before the agreement is established. Check with the ministry with which you are entering into a transfer payment agreement for more information regarding whether this attestation is applicable to your situation. Organizations may choose to complete and submit this form voluntarily.

For steps and information on how to verify your tax compliance status, go to the [Check your tax compliance status](#) webpage.

1. Complete the information or select the **Skip this section** checkbox, if applicable.

**Attestation of Compliance and Tax Compliance Verification (Optional)**

 **Notification:**

Please be advised that your organization's attestation is only valid for one-year. If your organization intends to enter into a new, renewed, or amended transfer payment agreement for new funding beyond this date, where an attestation and Tax Compliance Verification is required, please re-attest and ensure that your Tax Compliance Verification information is up-to-date. You may contact your funding ministry for further information and confirmation.

The Attestation of Compliance Purpose and Definitions is available for download [here](#).

☐ Skip this section

2. Select **Save and Continue**.

## Step 5: Annual general meeting (AGM)

In the AGM section, you can enter additional organization information and details about the annual general meeting.

1. Complete the information or select the **Skip this section** checkbox, if applicable.

**Additional Organizational Info / Annual General Meeting Info (Optional)**

This section provides some Additional Organizational Information and Annual General Meeting Information.

☐ Skip this section

2. Select **Save and Continue**.

## Step 6: Documents

In this step, organization documents including information about the organization's Audited Financial Statements (AFS) are uploaded. Documents attached to the organization profile are automatically included with your submissions.

Documents that are no longer relevant can be archived by selecting **Archive Document**. Archived documents can be restored from the **View Archive List**.

1. Select **+Add Document**.

**Organization Documents**

- To view/download the document, click on the File Name below.
- Displaying Active Documents

**Note:** Check the box to select one or more documents.

No attached document

Add Document

[Archive Document](#)

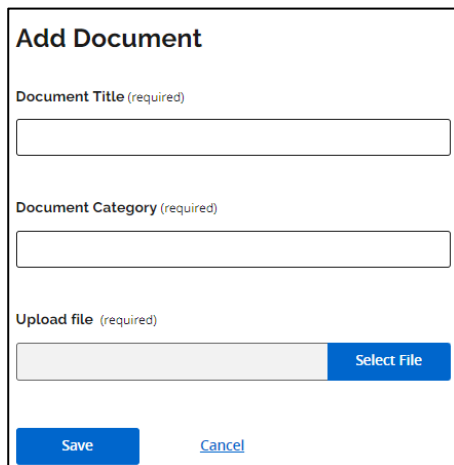
[View Archive List](#)

Back

Save and Continue

2. Complete the title and document category.





**Add Document**

**Document Title** (required)

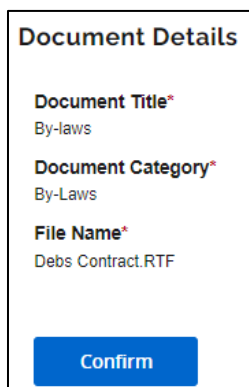
**Document Category** (required)

**Upload file** (required)

[Select File](#)

[Save](#) [Cancel](#)

3. Select **Select File**.
4. Select the file from your device and select **Open**.
5. Select **Save**. A confirmation message appears.



**Document Details**

**Document Title\***  
By-laws

**Document Category\***  
By-Laws

**File Name\***  
Debs Contract.RTF

[Confirm](#)

6. Select **Confirm**.
7. Repeat for each additional document.
8. Select **Save and Continue**.

## Step 7: Review and submit

1. Review the information.

**Registration Summary**

Below is the registration information you have entered.

- If updates are required, use the Registration Menu or click Back
- Click Submit Registration to submit.

**Registration Information**

Registration ID	59989
Status	Registration Draft
Status Reason	Registration Draft Created

**Organization Profile**

Legal Name	Debs Third Organization
Operating Name	Debs Third Organization
Ownership Type	Individual

- If edits are required, navigate to the section to be edited.
- To download a PDF version of the registration summary, select **Submission Summary (PDF)**.

**Download a copy**

[Submission summary \(PDF\)](#)

2. Scroll down to **Declaration**.

**Declaration**

☐ By clicking 'Submit Registration', I agree with the following statement: On behalf of and with the authority of the registering organization, I certify that

- I am authorized to agree to these terms on behalf of the registering organization.
- I have read and understand these terms and the other information set out on this page.
- The information about the registering organization that has been provided on this page is true, correct and complete in every respect.
- I understand that the information provided on this page may be disclosed:
  - To the public in accordance with the Freedom of Information and Protection of Privacy Act and/or applicable Ontario Government transparency and information sharing policies and directives;
  - To other Ontario ministries and agencies for the purposes of assessing funding eligibility, accountability and oversight, and program administration; and
  - To the Canada Revenue Agency, for validation purposes.
- I agree, on behalf of the registering organization, to update the information provided on this page promptly in the event that the relevant information about the registering organization changes.
- These terms may be modified by Ontario through written notice that is provided to the registering organization using the contact information provided on this page.

Information on this page is being used for the purpose of registering your organization in the Transfer Payment Ontario system. Questions related to the collection, use and disclosure of information about your organization should be directed to Transfer Payment Ontario Client Care from Monday to Friday 8:30 a.m. to 5:00 pm, except for government and statutory holidays, at:

Toll-free: 1-855-216-3090

TTY: 416-325-3408

Toll-free TTY: 1-800-268-7095

Email: [TPONCC@ontario.ca](mailto:TPONCC@ontario.ca)

Back

Complete Registration

3. If everything is correct, read the declaration then select the checkbox.
4. Select **Complete Registration**.
  - a. If you indicated “No” to having a CRA BN in the step 1 **Organizational Profile** of the registration, you must complete the **CRA Program Account Check list**.

### CRA Program Account Check List

Please ensure that you have answered all 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.

Is your organization	CRA Program Account						
Incorporated	Corporation income tax (RC)	<input type="radio"/>	Yes	<input type="radio"/>	No	<input type="radio"/>	Unsure
A charity organization	Registered charity (RR)	<input type="radio"/>	Yes	<input type="radio"/>	No	<input type="radio"/>	Unsure
An air carrier that charges the air travellers security charge	Air travellers security charge (RG)	<input type="radio"/>	Yes	<input type="radio"/>	No	<input type="radio"/>	Unsure
Brokers and agents who place contracts of insurance	Insurance premium tax (RN)	<input type="radio"/>	Yes	<input type="radio"/>	No	<input type="radio"/>	Unsure

Does your organization							
Provide taxable supplies and services that are subject to the GST/HST	GST/HST (RT)	<input type="radio"/>	Yes	<input type="radio"/>	No	<input type="radio"/>	Unsure
Annual income exceed the \$30,000 threshold in four consecutive quarters	GST/HST (RT)	<input type="radio"/>	Yes	<input type="radio"/>	No	<input type="radio"/>	Unsure
Pay salaries, wages (including advances), bonuses, vacation pay, or tips to employees	Payroll deductions (RP)	<input type="radio"/>	Yes	<input type="radio"/>	No	<input type="radio"/>	Unsure
Provide certain taxable benefits, such as an automobile or allowances to employees	Payroll deductions (RP)	<input type="radio"/>	Yes	<input type="radio"/>	No	<input type="radio"/>	Unsure
Import goods into Canada or export goods to other countries	Import-export (RM)	<input type="radio"/>	Yes	<input type="radio"/>	No	<input type="radio"/>	Unsure
Charge excise duty on products	Excise duty (RD)	<input type="radio"/>	Yes	<input type="radio"/>	No	<input type="radio"/>	Unsure
Charge excise tax on products	Excise tax (RE)	<input type="radio"/>	Yes	<input type="radio"/>	No	<input type="radio"/>	Unsure
Export softwood lumber products	Softwood lumber (SL)	<input type="radio"/>	Yes	<input type="radio"/>	No	<input type="radio"/>	Unsure
File information returns, such as Partnership Information Return (T5013) that must be filed using a business number (BN) containing letters (RZ)	Information returns (RZ)	<input type="radio"/>	Yes	<input type="radio"/>	No	<input type="radio"/>	Unsure

[Back](#)
[Clear](#)
[Submit](#)

- b. Complete the information.
  - c. Select **Submit**.
5. A **Registration Confirmation** page appears.

### Registration Confirmation

Registration ID  
59989

Status  
Registration Submitted

Status Reason  
CRA Business Number Validation Not Successful

Organization Profile	
Legal Name	Debs Third Organization
Operating Name	Debs Third Organization
Ownership Type	Individual

6. If you want to print a copy of the confirmation, select the **Submission summary (PDF)** link.
7. Select **Done**.

## Types of user roles

There are two types of users in Transfer Payment Ontario: **Administrator** and **Associate**. Both roles have access to the organization information in Transfer Payment Ontario, but do not share the same rights to modify or add organization information.

### Administrator user

An administrator user can:

- view and update the organization profile
- approve access requests for new organization users
- perform funding-related activities

**Note:** If your Transfer Payment Ontario administrator leaves their role, you can request a new administrator. Send an email to [TPONCC@ontario.ca](mailto:TPONCC@ontario.ca), and copy another member of your organization for authentication/identification purposes. Transfer Payment Ontario will update the administrator information as required.

### Associate user

An associate user can:

- view as read-only the organization profile
- perform funding-related activities

## Contact us

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**TTY:** 416-325-3408

**Toll-free TTY:** 1-800-268-7095

**Email:** [TPONCC@ontario.ca](mailto:TPONCC@ontario.ca)

There are a variety of Transfer Payment Ontario reference guides and videos available online. Visit [ontario.ca/GetFunding](https://ontario.ca/GetFunding) to learn more.