Updating an organization

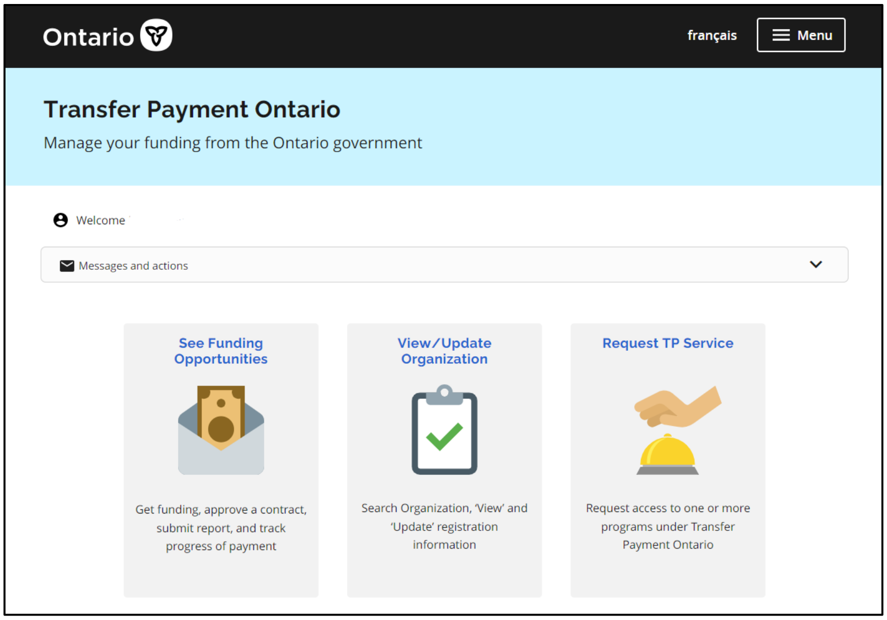
Contents

Document summary

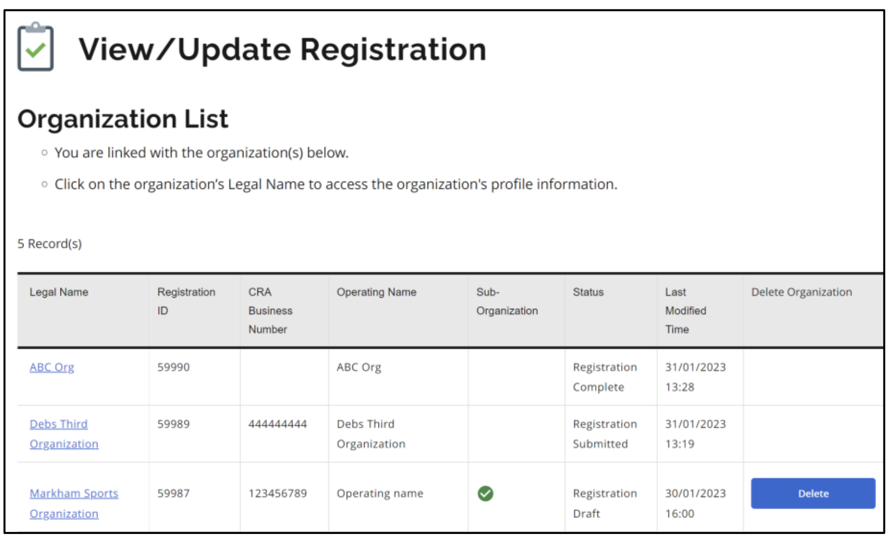
This document outlines how you can view or update your organization information, users, and sub-organizations.

Viewing organization details

1. Sign in to Transfer Payment Ontario using a Google Chrome web browser.
2. Select **View/Update Organization**.



3. Select the **Legal Name** of the organization.



View/Update Registration

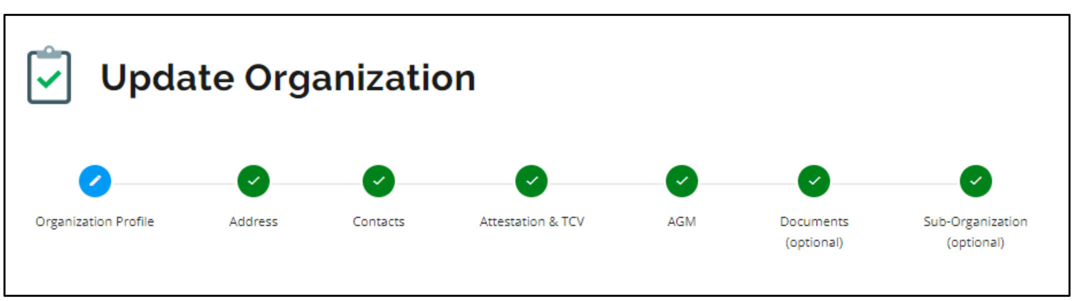
Organization List

- You are linked with the organization(s) below.
- Click on the organization's Legal Name to access the organization's profile information.

5 Record(s)

Legal Name	Registration ID	CRA Business Number	Operating Name	Sub-Organization	Status	Last Modified Time	Delete Organization
ABC Org	59990		ABC Org		Registration Complete	31/01/2023 13:28	
Debs Third Organization	59989	444444444	Debs Third Organization		Registration Submitted	31/01/2023 13:19	
Markham Sports Organization	59987	123456789	Operating name	✓	Registration Draft	30/01/2023 16:00	Delete

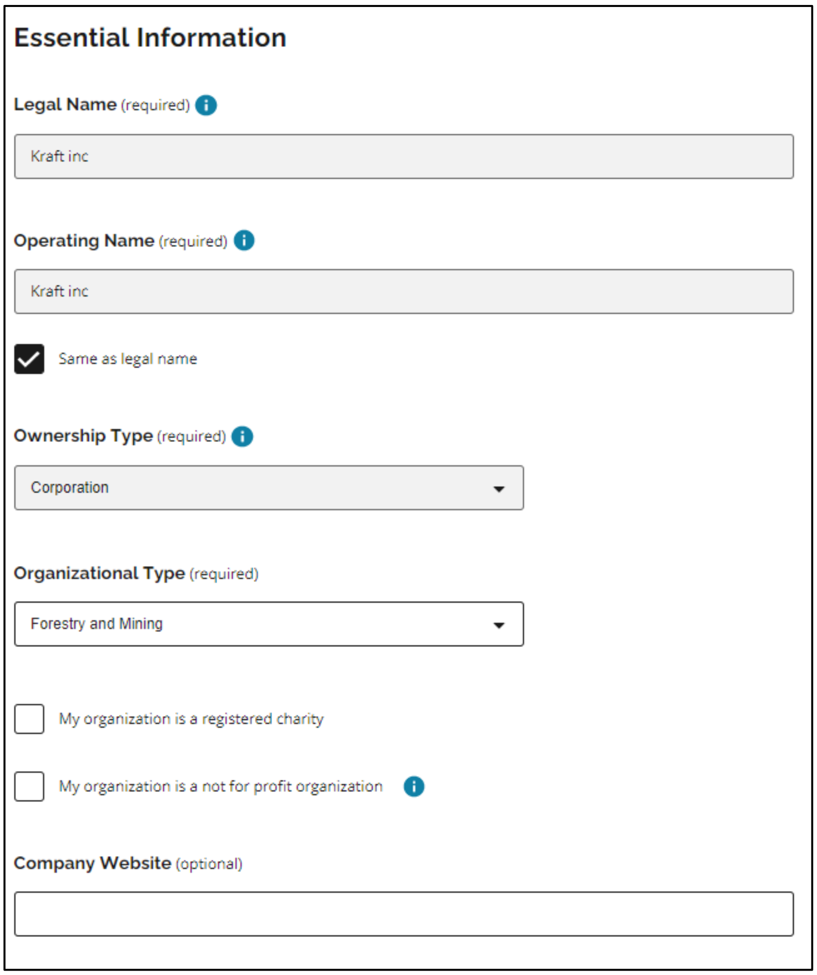
4. Select the tab you want to view or update.



Updating the organization profile

Organization administrators can update the organization’s profile and information. Associate users have read-only access to the profile information.

1. Select the **Organization Profile** tab.

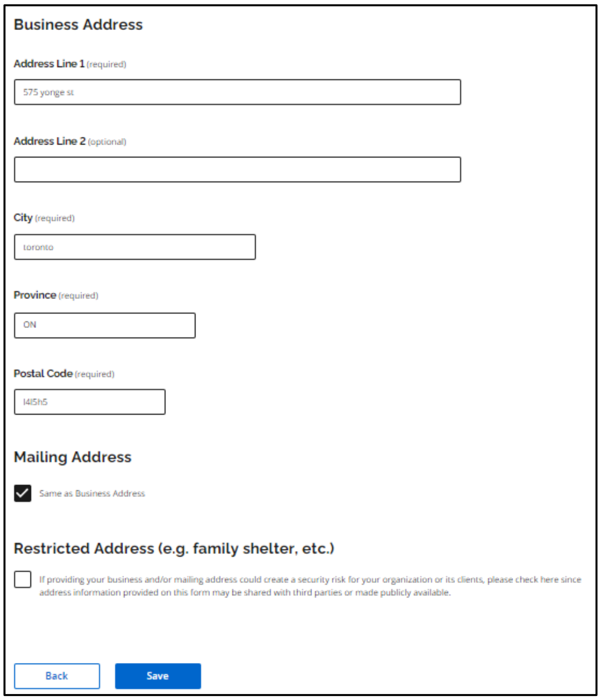


2. Make changes if required.
3. Select **Save**.

Note: Some fields are read-only and cannot be edited. Read-only fields appear with a grey background.

Updating the address

1. Select the **Address** tab.

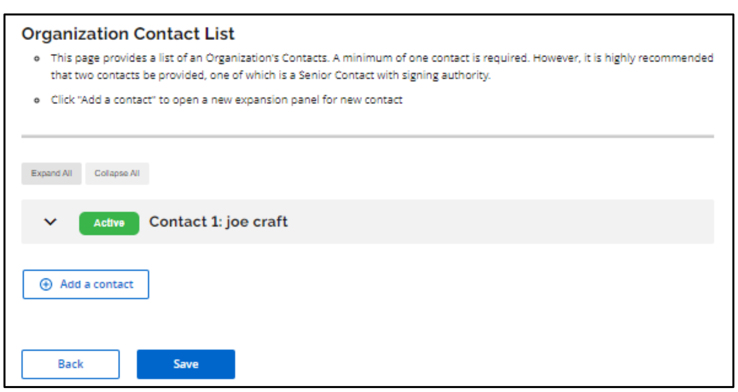


2. Make changes if required.
3. Select **Save**.

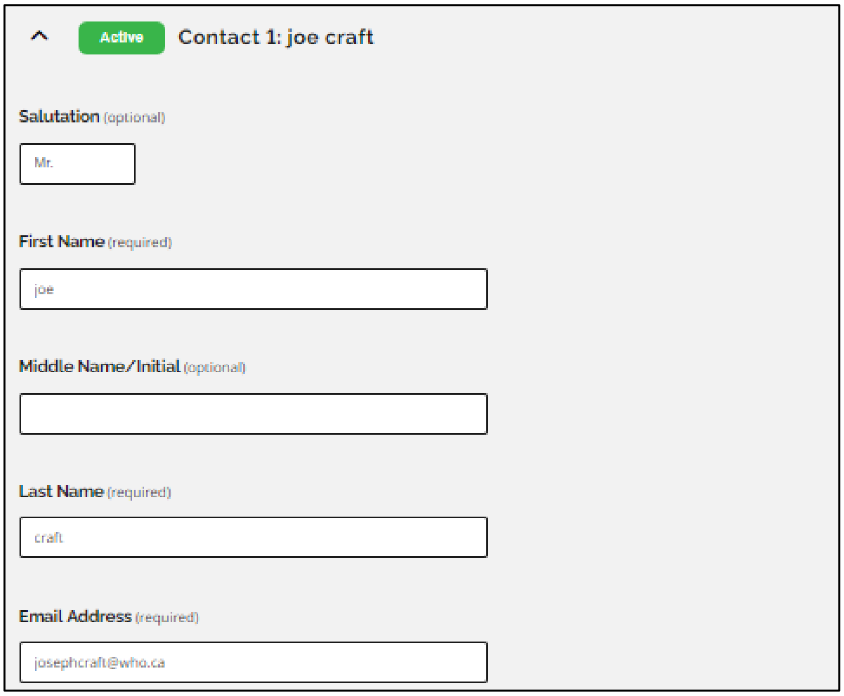
Updating the contacts

Organization administrators can update the organization's contacts. Associate users have read-only access to the contact information.

1. Select the **Contacts** tab.



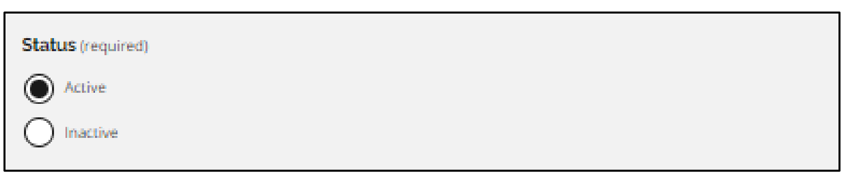
2. Select the contact’s name.



3. Make changes if required.
4. Select **Save**.

Removing a contact

1. Open the contact.
2. Change the **Status** field to **Inactive**.



3. Select **Save.** Once the change is saved, the inactivated user receives a notification that their information has been updated.

Note: A minimum of one contact is required.

Updating the 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 can be completed when updating your organization's information. Completion of the attestation can be done at any time and requires the organization to input information from a completed TCV check.

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.

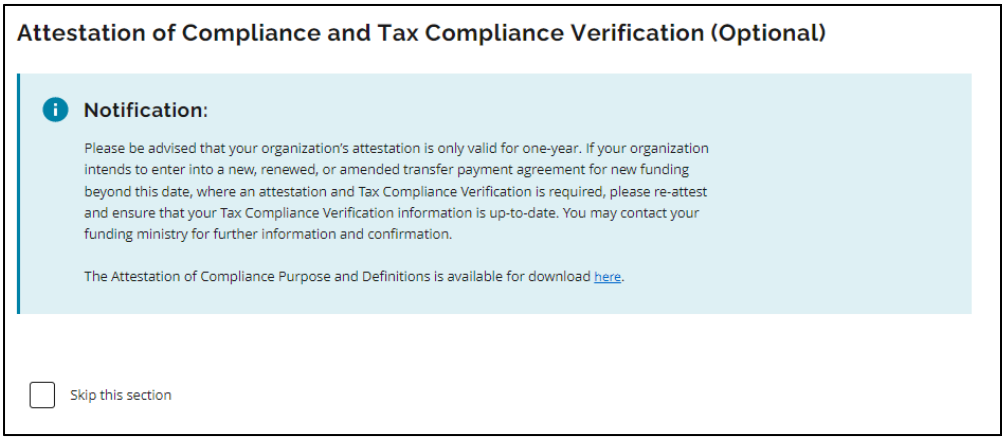
The attestation can also be submitted on a voluntary basis. If you are unsure if you need to complete this attestation, check with your ministry funder for more information.

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. Select the **Attestation & TCV** tab.



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.

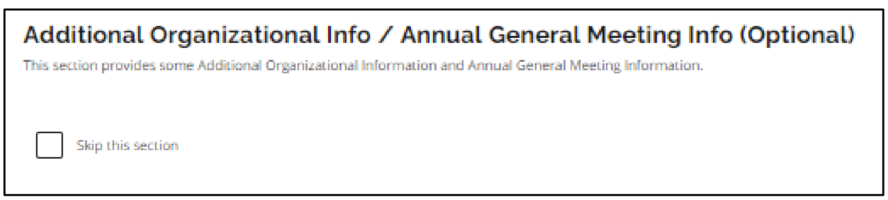
The Attestation of Compliance Purpose and Definitions is available for download here.

Skip this section

2. Make changes if required.
3. Select **Save**.

Updating the annual general meeting (AGM)

1. Select the **AGM** tab.



Additional Organizational Info / Annual General Meeting Info (Optional)

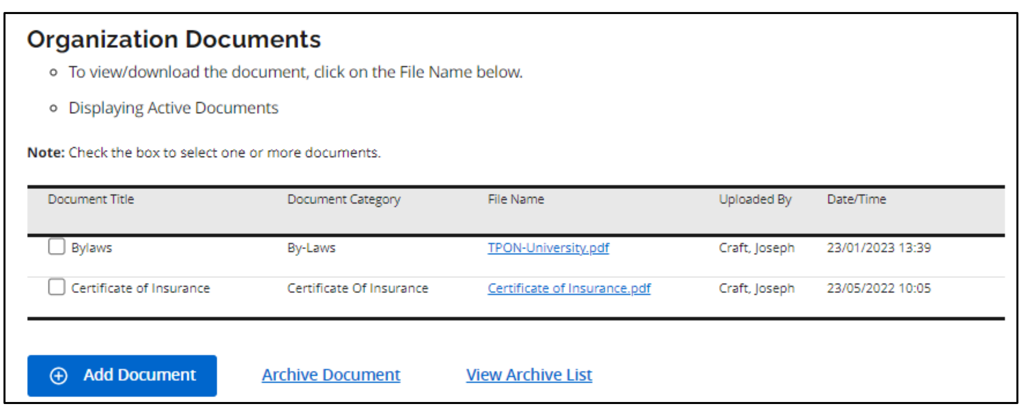
This section provides some Additional Organizational Information and Annual General Meeting Information.

Skip this section

2. Make changes if required.
3. Select **Save**.

Updating the documents

1. Select the **Documents** tab.



Organization Documents

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

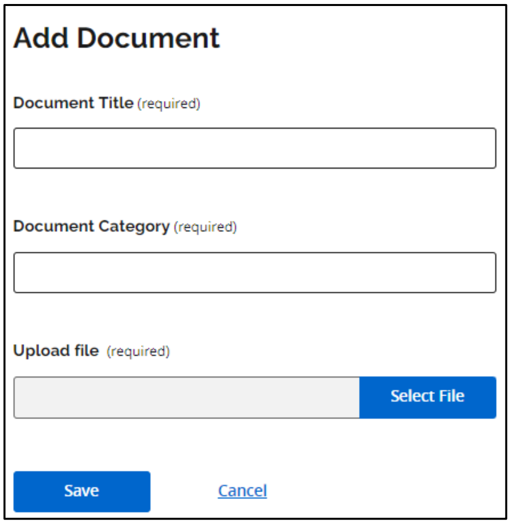
Note: Check the box to select one or more documents.

Document Title	Document Category	File Name	Uploaded By	Date/Time
Bylaws	By-Laws	TPON-University.pdf	Craft, Joseph	23/01/2023 13:39
Certificate of Insurance	Certificate Of Insurance	Certificate of Insurance.pdf	Craft, Joseph	23/05/2022 10:05

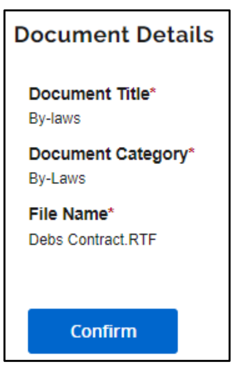
Add Document Archive Document View Archive List

Adding a document

1. Select +**Add Document**.



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



6. Select **Confirm**.

Note: Documents attached to the organization profile are automatically included with your submissions. Documents that are no longer applicable can be archived.

Viewing a document

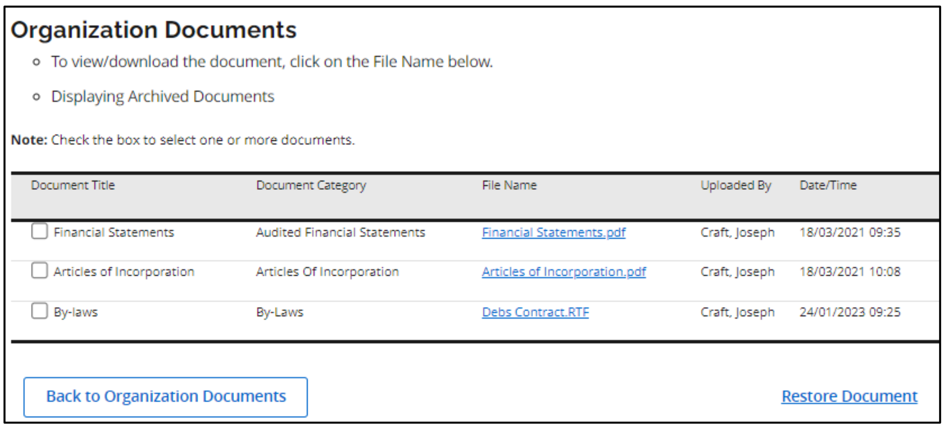
1. Select the **File Name**.
2. The file is downloaded to your device to review.

Archiving a document

1. Select the checkbox of the document(s) you want to archive.
2. Select **Archive Document**.
3. The document is removed from the **Organization Documents** list.

Viewing an archived document

1. Select **View Archive List**. The list of archived documents appears.



Organization Documents

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

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

Document Title	Document Category	File Name	Uploaded By	Date/Time
☐ Financial Statements	Audited Financial Statements	Financial Statements.pdf	Craft, Joseph	18/03/2021 09:35
☐ Articles of Incorporation	Articles Of Incorporation	Articles of Incorporation.pdf	Craft, Joseph	18/03/2021 10:08
☐ By-laws	By-Laws	Debs Contract.RTF	Craft, Joseph	24/01/2023 09:25

Back to Organization Documents   Restore Document

2. Select the **File Name**.
3. The file is downloaded to your device for review.

Restoring an archived document

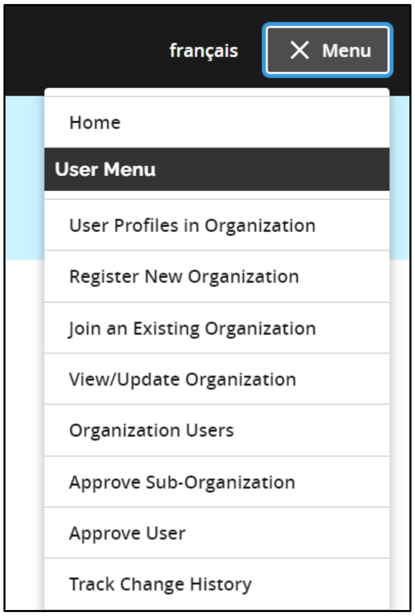
1. Select checkbox of the document(s) you want to restore.
2. Select **Restore Document**.
3. Select **Back to Organization Documents**.
4. The documents are now restored.

Managing organization users

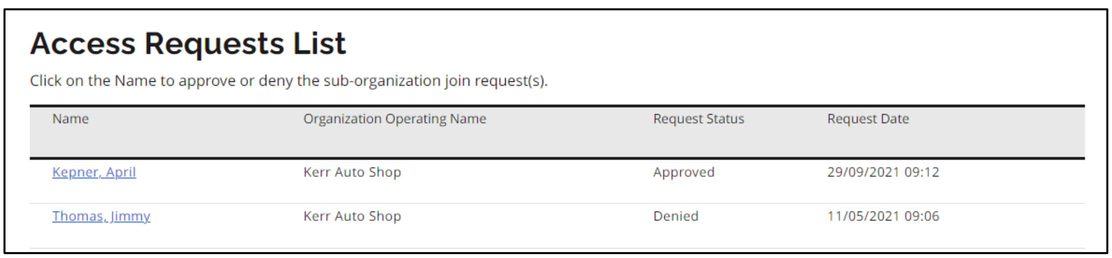
Approving an organization user

Organization administrators will receive email notification when new users request to join the organization. Requests can be approved or denied in Transfer Payment Ontario.

1. Sign in to Transfer Payment Ontario using a Google Chrome web browser.
2. Select the **Menu** and **Approve User** menu option.



3. The table shows the history of requests. The **Request Status** column will show if the user is requested (pending), approved, or denied.

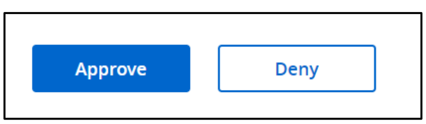


Access Requests List

Click on the Name to approve or deny the sub-organization join request(s).

Name	Organization Operating Name	Request Status	Request Date
Kepner, April	Kerr Auto Shop	Approved	29/09/2021 09:12
Thomas, Jimmy	Kerr Auto Shop	Denied	11/05/2021 09:06

4. Select the requestor's name to review their request and information.
5. If the request is pending, select **Approve** or **Deny**.



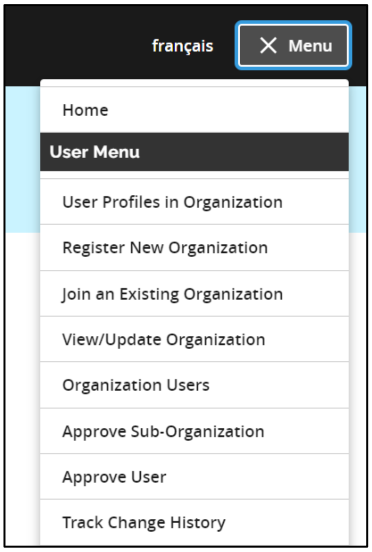
6. The requestor will receive confirmation of their request.

Removing an organization user

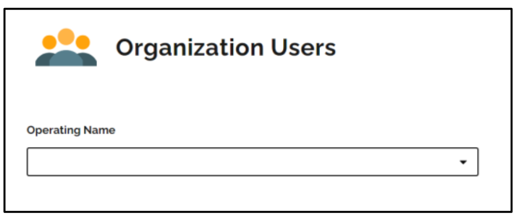
Organization administrators can deactivate users to remove organization access in Transfer Payment Ontario.

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

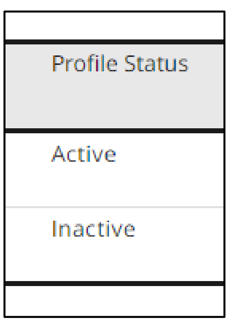
2. Select the **Menu** and **Organization Users** menu option.



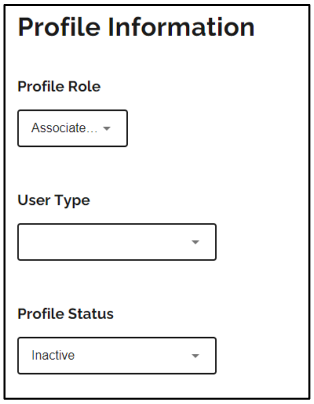
3. Choose your organization from the **Operating Name** dropdown menu.



4. The table shows the history of users. The **Profile Status** column will show if the user is active or inactive in the organization.



5. Select the user's name to review their profile.
6. Under **Profile Information**, select the **Profile Status** dropdown menu to update the status.



7. Select **Save** to update their access.

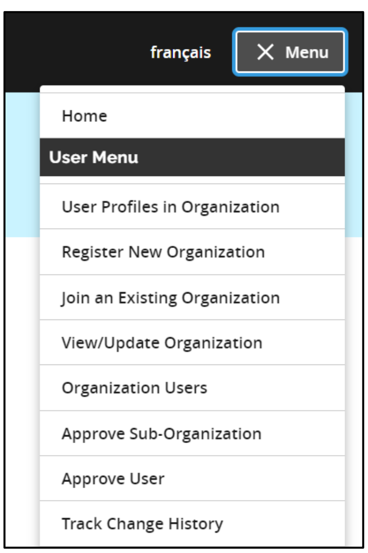
Managing sub-organizations

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

Approving a sub-organization

Organization administrators can approve or deny requests for sub-organizations in Transfer Payment Ontario.

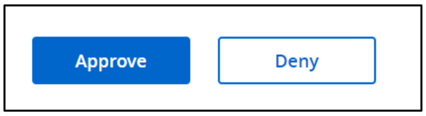
1. Sign in to Transfer Payment Ontario using a Google Chrome web browser.
2. Select the **Menu** and **Approve Sub-Organization** menu option.



3. The table shows the history of sub-organization requests. The **Request Status** column will show if the sub-organization is requested (pending), approved, or denied.

Li, David	SubJan	Requested	31/01/2023 14:54
Lynch, Brendan	ABCO Sub-Org 2	Approved	01/12/2022 11:28

4. Select the requestor's name to review their request and sub-organization information.
5. If the request is pending, select **Approve** or **Deny**.



6. The requestor will receive confirmation of their request.

Contact us

If you need assistance, please contact Transfer Payment Ontario Client Care from Monday to Friday 8:30 a.m. to 5:00 p.m. 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

There are a variety of Transfer Payment Ontario reference guides and videos available online. Visit ontario.ca/GetFunding to learn more.