



# Transfer Payment Common Registration System

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## Organization Registration

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## Introduction

### Overview

The Transfer Payment Common Registration (TPCR) system makes registering your organization with the Ontario government easy and secure. With TPCR, organizations submit their profile information once accessible to all funding ministries. TPCR connects organizations to other government funding systems like Grants Ontario.

In summary, the TPCR is a system that enables:

- Organizations to submit, update and maintain organization profile information; and
- Ontario ministries to access organization profile information from a centralized system.

The Grants Ontario system enables organizations to apply for grants and view the status of their applications. Together, the Grants Ontario System and TPCR offer an easy and secure way for Ontarians to apply for and receive funding from the government. This is part of the Government of Ontario's commitment to modernize transfer payment administration.

### Purpose of this Manual

This manual provides step-by-step instructions on how to:

- Register an organization in the Transfer Payment Common Registration system; and
- Request access to the Grants Ontario system, if applicable

### Getting More Information

For more information contact the Customer Service team:



Phone: **1-855-216-3090** or **416-325-6691**



Email: [GrantsOntarioCS@Ontario.ca](mailto:GrantsOntarioCS@Ontario.ca)

## User Roles

### **Admin User**


The admin user has the ability to:

- ✓ Manage (own) transfer payment account including user profiles for the organization
- ✓ Manage profiles of other users associated with the given organization
- ✓ Review and approve / deny requests for access to the organization registration
- ✓ Create new organization registrations
- ✓ Merge existing registrations
- ✓ View and manage organization registration details
- ✓ Enrol and receive access to the Grants Ontario System in order to apply for funding, if applicable

### **Associate User**

An associate user has at least one approved access to an organization profile, and can:

- ✓ Manage (own) transfer payment account including their user profile under the organization registration
- ✓ View all the organization information (read-only access)
- ✓ Enrol and receive access to the Grants Ontario System in order to apply for funding.

** Note:** The first person to register an organization automatically becomes the Admin User for that organization. All other accounts for the same organization will be an Associate User.

## Register An Organization




Creating a new registration takes approximately 10 to 15 minutes when all the required information is available.

### ***Before You Begin***

#### **Ensure you have the following information available:**

- The 9 digit **Canada Revenue Agency Business Number (CRA BN)** for your organization. For more information, please refer to the CRA website.
- The **Legal Name** of your organization: The Legal Name of your **organization** is the name printed on official documents (e.g. articles of incorporation, registered business application, etc.).
- The **Operating Name** of your organization: The operating name of your organization is the name commonly used by your clients. For example, an organization's legal name may be "Ontario123456789" but commonly referred to as "John's Bookstore".
- Contact information for at least two contacts** is strongly recommended. In the event your organization only has one contact person, you may submit one contact, who should be at a senior level.

** Note:** ONE-key and GO Secure give you secure access to Ontario government programs and services, including the TPCR system. **If you do not have an existing ONE-key account, you will need to create your ONE-key account to access TPCR.**

For instructions on how to access TPCR, please refer to the "**Access TPCR**" manual.

## Search Organization

1. Log in to TPCR. The **Main Menu** window appears.

**Main Menu**


Transfer Payment Services:


- Click Create New Registration to register your organization
- Click Request Access to Registration to link your user account to an organization that is already registered
- Click View/Update Existing Registration to view or update your organization's profile information


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**Transfer Payment Services**

Common Registration


Create New Registration


Request Access to Registration


View / Update Existing Registration

2. Click  Create New Registration from the *Main Menu* window.

3. The *Registration Search* window appears.

Perform a registration search to ensure your organization has not already been registered by entering the organization's legal or operating name. Click Search. Alternatively, you may wish to search by CRA BN. Select the button next to **I know my CRA BN** and enter the organization's CRA BN. Click Search.

**Registration Search**

- Search for your organization by Legal Name, Operating Name or Canada Revenue Agency Business Number (CRA BN) to determine if your organization is registered.
- If your organization is listed below, it means the organization is already registered.
  - Select the organization and click Request Access to Registration.
- If your organization is not listed in the search results below, click Create New Registration to register.
  - Upon creating the registration, you will automatically be linked to the organization's profile and become an administrator of the organization's profile information
  - As the administrator, you will receive notification when another user requests to be linked to your organization's profile

Organization Legal or Operating Name ?

I know my CRA BN ?

Cancel
Reset
Search

**Tip:** Hover your mouse over  to see more information about the field.

- The *Search Results* window appears.

**Note:** If the error message “004 - Search results too large. Please refine your search” appears at the top of the page, please refine your search by entering more characters then click Search again.

**If your organization appears in the search results** list then it has already been registered. Select the organization from the list then refer to the “**Request Access to a Registered Organization**” manual. Do not continue with the following steps in this manual.

**If your organization does not appear as one of the search results** then click **Create New Registration**. The *Organization Profile* window appears.

Search Results	
0 records	
Legal Name	Operating Name
<a href="#">Create New Registration</a> <a href="#">Request Access to Registration</a>	

### Enter Organization Information

- From the *Organization Profile* window, complete the required fields. Click **Next**.

Registration Details	<p><b>Organization Profile</b></p> <p>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 or the Help Desk has reviewed the submitted registration if you have answered 'No' to the question 'Do you have a CRA BN?'</p> <p>For further information on the CRA BN, please refer to the Canada Revenue Agency website.</p>
Organization Profile	
Address	
Contacts	
Documents	
My Profile	
Summary	
Organization Users	
Access Requests	

**Essential Information**

Legal Name\* i

Operating Name\* i

Ownership Type\*

Organizational Type\*

Specify, if None of the above

Not for profit\*

Company Website

Registered Charity\*

Organization Affiliation i

**Business Information**

Do you have a CRA BN\*

CRA BN i

**Tip:** Fields with an asterisk \* are mandatory.

i **Note:** If you do not have a CRA BN: Select “no” to the question “Do you have a CRA BN” then click the checkbox next to the declaration. For more information please visit the Canada Revenue Agency website.

**Business Information**

Do you have a CRA BN\*

I declare that I am not, to the best of my knowledge, required to have a business number under the federal Income Tax Act in connection with carrying on a business or making deductions or withholdings required under the federal Income Tax Act. I understand that more information on whether I am required to have a business number is available directly from the Canada Revenue Agency.

- The *Organization Address* window appears. In the Business Address section, select the Country in which your business operates, enter the Postal Code (zip) and then click Address Lookup.



**Registration Details**

Organization Profile

**Address**

Contacts

Documents

My Profile

Summary

Organization Users

Access Requests

### Organization Address

Operating Name: ABCD Organization

- Enter your postal code and click Address Lookup.
- To update address, enter the new postal code and click 'Address Lookup'

**Business Address**

Country\*  Postal Code\*

**Address Lookup**

**Mailing Address**

Same as Business Address

Country\*  Postal Code\*

**Address Lookup**

**Address Exemption**

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

**Cancel**
**Back**
**Next**

The *Postal Code Look-up* window appears.

### Postal Code Look-up

Operating Name: ABC Inc.

- Select your address from the list below and click Next to continue.
- If your address is not displayed, ensure the postal code you entered is correct.
- If the postal code you entered is correct, click 'My Address Is Not Listed'.

Postal Code L4L8V1


Number	Odd/ Even	Delivery Mode	Street Name	Municipality	Province
<input type="radio"/> 2			CHRISLEA	WOODBRIIDGE	ON
<input type="radio"/> 156 - 240	Even		CHRISLEA	WOODBRIIDGE	ON

[My Address Not Listed](#)

**Cancel**
**Back**
**Next**

- Select your address from the list then click **Next**.
- The window that appears depends on the postal code you entered. Regardless of what window appears, fill in the blank fields then click **Save** to return to the *Organization Address* window.

If your business and mailing address are the same click the checkbox beside **Same as Business Address**.

 **Note:** If disclosing either your mailing address or business address poses a security risk for your organization or clients, leave the address fields blank and check the box in the Address Exemption section.

5. Click . The *Organization Contact List* window appears.

**Enter Contact Information**

**Note:** It is strongly recommended that you list two contacts: (1) the person with whom the Minister of the Crown would correspond (e.g. CEO, Executive Director) and (2) at least one additional contact with whom ministry staff would correspond.

In the event your organization only has one contact person, it is recommended to submit one contact who should be at a senior level.

**Note:** Contacts are not automatically provided access to the organization in TPCR. Contacts must request access to a registered organization. For instructions, please refer to the **Request Access to a Registered Organization** manual.

- From the *Organization Contact List* window, click **Add Contact**.

**Registration Details**

- Organization Profile
- Address
- Contacts**
- Documents
- My Profile
- Summary
- Organization Users
- Access Requests

**Organization Contact List**  
Operating Name:ABC Inc.

- 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 Contact or click Next to continue
- To view and/or update an existing contact's information, click on the Name

No Contact

Cancel Add Contact Back Next

- The *Organization Contact Information* window appears.

**Registration Details**

- Organization Profile
- Address
- Contacts**
- Documents
- My Profile
- Summary
- Organization Users
- Access Requests

**Organization Contact Information**  
Operating Name:ABC Inc.

- 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.
- Complete the required information and select Save

**Official's Name**

Salutation

First Name\*

Middle Name/ Initial

Last Name\*

**Contact Position Details**

Position's Title

Department

Contact Type\*

Signing Authority

Modified By

Modified Date/Time

Enter the contact information. Click [Save](#).

The following are tips on completing the **Contact Type** field:

- **Senior Contact:** This is the most senior elected or appointed official with whom a Minister of the Crown would correspond with (i.e. Mayor, Board Chair, Reeve or CEO).
- **Payment Contact:** Individual who should be contacted for clarification about banking information or financial matters.
- **Other Contact:** Any other person with whom the Ministry might wish to contact or additional signing authorities.

3. The contact appears in the Organization Contact List window.

**Organization Contact List**  
Operating Name: Test Org

- 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 Contact or click Next to continue
- To view and/or update an existing contact's information, click on the Name

Name	Position Title	Contact Type	Department
<b>Active Contacts</b>			
Bobber, Bob		Senior	
<b>Inactive Contacts</b>			

Cancel      Add Contact      Back      Next

4. Repeat steps 1-3 for each contact.
5. When all contacts have been added, click **Next**. The *Organization Documents* window appears.

## Attach Documents

### Introduction

In this section you can attach documents such as Articles of Incorporation, By-Laws, Band Council Resolution, etc. Once attached these documents will be linked to your organization registration and will be available to funding ministries.

### Document Restrictions

- Each attachment file must be **less than 5MB**.
- You can attach multiple documents.
- Recommended Formats include:
  - ✓ PDF (.pdf) an optically-recognized (OCR) PDF is recommended
  - ✓ Word (.doc, .docx, .rtf)
  - ✓ Text (.txt)
  - ✓ Excel (.xls, .xlsx)
  - ✓ PowerPoint (.ppt, .pptx),
  - ✓ Images (.jpeg, .JPG)
- ZIP files are not allowed.

### Attach a Document

1. From the *Organization Documents* window, Click **Add Document**.

The screenshot shows a web interface for 'Organization Documents'. On the left is a navigation menu with options: Registration Details, Organization Profile, Address, Contacts, Documents (highlighted), My Profile, Summary, Change History, Organization Users, and Access Requests. The main content area shows 'Organization Documents' for 'Honey Org'. It includes a note: 'To view/download the document, click on the File Name' and another note: 'Check the box to select one or more documents.' Below these notes is a grey bar stating 'No attached document'. At the bottom, there are buttons for 'View Archive List', 'Cancel', 'Archive Document', 'Add Document', 'Back', and 'Next'. The 'Add Document' button is highlighted with a blue box.

2. The *Add Document* window appears. Enter a title for the document to help identify the type of document that is attached.

**Add Document**  
 Operating Name: ABC Inc.

**Document Details**

Document Title\*

Document Category\* Please Select ▾

Select File to Add\* Choose File | No file chosen

Back Save

3. Select the appropriate document category from the **Document Category** dropdown list.
4. Click Choose File to view your files.
5. Select the appropriate file then click Open.
6. Click Save. A confirmation window appears.

**Add Document Confirmation**  
 Operating Name: rachelle crescini

- Review the document details below. Uploading the document will complete the process of adding the document to your organization's document folder. The document will be accessible to reviewers of your funding application.
- Select Confirm to upload the document, or Back to return to the previous step in the process.

**Document Details**

Document Title\* Styles

Document Category\* Annual Report

File Name\* Algonquin.txt

Back Confirm

7. Click Confirm. The document appears in the Organization Document List window.

**Organization Document List**  
 Operating Name: Test Org

- To add a document, click Add Document
- To view/download the document, click on the File Name

<input type="checkbox"/>	Document Title	Document Category	File Name	Uploaded By	Date/Time
<input type="checkbox"/>	Org	Organization Chart	Doc1.docx	Reset3051, gosapplicant01	06/06/2017 10:24

View Archive Archive Document Add Document  
Cancel Back Next

8. To add another document, repeat steps 1 to 7 above.
9. Click **Next**. The *My Profile* window appears.



**Complete User Profile**

- From the *My Profile* window, complete your user profile. Click **Next**. The *Registration Summary* window appears.

**Note:** Certain fields will be pre-populated based on the information you provided when creating your account.

- Registration Details
- Organization Profile
- Address
- Contacts
- Documents
- My Profile
- Summary
- Change History
- Organization Users
- Access Requests

**My Profile**  
Operating Name: Demo TPCR Ltd

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**User Information**

Salutation:

First Name:

Middle Name/Initial:

Last Name:

Position's Title:

Department:

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**Profile Information**

Profile Name\*:

Profile Status:

Last Modified By:

Last Modified:

Email Address\*:

Primary Phone #\*

Country Code	Area Code	Phone Number	Extension
<input type="text" value="001"/>	<input type="text" value="222"/>	<input type="text" value="3444444444"/>	<input type="text"/>

Secondary Phone #

Country Code	Area Code	Phone Number	Extension
<input type="text" value="001"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Fax Number

Country Code	Area Code	Phone Number	Extension
<input type="text" value="001"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

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**Contact Address**

Country:  Postal Code:

**Address Lookup**

The following are tips on completing the information:

Field	Tip
<b>Position Title</b>	Your title/designation in the organization
<b>Department</b>	Department name e.g. Finance. If your organization does not have departments, leave blank.
<b>Profile Name</b>	<p>A profile name is different from a user's name. Since a user can be associated with multiple organizations a unique profile name for each association is required. Profile names also help you in identifying the profile you want to update when you are associated with more than one organization.</p> <p>If you don't enter a profile name, the name of your organization will appear.</p>
<b>Profile Status</b>	<p><b>Active:</b> User can perform all functions allowable by his/her user type.</p> <p><b>Inactive:</b> When a user's profile has an "Inactive" status the user cannot access the registration information. This status is applicable to users that left the organization or will not be accessing the registration any further. An "Inactive" status can be reversed by another Admin User or by contacting Customer Service at 1-855-216-3090 or 416-325-6691 or e-mail at <a href="mailto:GrantsOntarioCS@Ontario.ca">GrantsOntarioCS@Ontario.ca</a>.</p>
<b>Last Modified By</b>	This shows the name of the contact that last modified the user profile.
<b>Last Modified Date/Time</b>	This shows the date and time this profile was last modified.

**Review and Submit Registration**

1. From the *Registration Summary* window, carefully review and ensure the summary of information that has been entered for the organization is accurate.

<b>Registration Details</b>	<b>Registration Summary</b>	
<a href="#">Organization Profile</a>	Operating Name: Demo TPCR Ltd	
<a href="#">Address</a>	Below is the registration information you have entered.	
<a href="#">Contacts</a>	<ul style="list-style-type: none"> <li>• If updates are required, use the Registration Menu or click Back</li> <li>• Click Submit Registration to submit.</li> </ul>	
<a href="#">Documents</a>	<b>Registration Information</b>	
<a href="#">My Profile</a>	Registration ID ⓘ	52083
<b>Summary</b>	Status	Registration Submitted
<a href="#">Change History</a>	Status Reason	CRA Business Number Not Required
<a href="#">Organization Users</a>	<b>Organization Profile</b>	
<a href="#">Access Requests</a>	CRA Business Number ⓘ	
	Legal Name ⓘ	Demo TPCR Ltd
	Operating Name ⓘ	Demo TPCR Ltd
	Ownership Type	Partnership
	Organizational Type	Agriculture
	Not for profit	No
	Registered Charity	No
	Do you have a CRA Business Number	No
	Program Business Number ⓘ	
	Company Website	
	<b>Address</b>	
	<b>Business Address</b>	<b>Mailing Address</b>
	FLOOR 32, 60 H BRIAN HARRISON WAY SCARBOROUGH, ON CA M1P5J5	Same as Business Address

**Organization Contact List**

Name	Position Title	Contact Type	Department
One, Contact	CFO	Payment	Dept

**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.

Cancel
Back to Organization List
Print

**Note:** **Program Number** is a 15-digit number issued once your organization’s registration status is complete and is required to enter into a funding relationship with the Province of Ontario.

Edit the information, if required.

- You can navigate between sections by using the section tabs on the left side of the window or click the **Back** / **Next** buttons.
  - **Navigating through various windows does not put you at risk of losing any information you have already saved.**
2. If everything is correct, read the declaration then click the **Declaration** checkbox.
  3. Click **Submit Registration**.
    - By submitting the registration, you will automatically become an Admin User of the organization’s profile information. As the Admin User, you will receive a notification e-mail whenever another user submits a request to access the organization’s profile.
    - The **Registration Status** must be “Complete” in order to apply for funding.

- Organizations that do not have a Business Number must call Customer Service at 1-855-216-3090 or 416-325-6691, or e-mail GrantsOntarioCS@Ontario.ca to complete the registration.
- After you click **Submit Registration** the system will validate the CRA BN against the CRA database. Based on the results of the CRA BN validation and the information provided you will be given one of the following registration statuses.

Registration Status	Status Reason
Draft	<ul style="list-style-type: none"> <li>▪ Registration In Progress</li> </ul>
Submitted	<ul style="list-style-type: none"> <li>▪ CRA Business Number Is Required, Not Provided</li> <li>▪ CRA Business Number Is Not Required – Registrant requested to contact GO Customer Support</li> <li>▪ CRA Business Number Validation Not Successful</li> </ul>
Complete	<ul style="list-style-type: none"> <li>▪ CRA Business Number is not required – Status change by Customer Service</li> <li>▪ CRA Business Number Provided and Validated</li> </ul>

A registration confirmation appears.

Your Registration has been successfully submitted. You have indicated that you do not have a Canada Revenue Agency Business Number (CRA BN). To complete the registration, please contact the Customer Service at 1-855-216-3090 or 416-325-6691.

**Registration Confirmation**

**Registration Information**

Registration ID	51884
Registration Status	Registration Submitted
Registration Status Reason	CRA Business Number Not Required

**Organization Profile**

CRA Business Number	
Legal Name	Honey Org
Operating Name	Honey Org
Ownership Type	Individual
Organizational Type	Library
Not for Profit	Yes
Registered Charity	No
Do you have a CRA Business Number	No
Business Program Number	
Company Website	

**Address Exemption Selected**

**Organization Contact List**

Name	Title	Contact Type	Department
Bobber, Bob		Senior	

Done Print

**Complete User Survey**

Transfer Payment Common Registration (TPCR) is part of the Government’s commitment to implement simpler and more consistent business processes to support the delivery of services for Ontarians.

1. Please complete the brief survey found below the confirmation. The information provided will be used to explore opportunities to enhance the TPCR system in the future.

Thank you for submitting your registration through the Transfer Payment Common Registration (TPCR) system. Your feedback is important to us. Please take a few moments to complete the survey below.

1. How do you rate your experience using the online Transfer Payment Common Registration (TPCR) system?\*

1 (Very Difficult)     
  2     
  3     
  4     
  5 (Very Easy)

Comments:

2. How do you rate the navigation instructions?\*

1 (Very Difficult)     
  2     
  3     
  4     
  5 (Very Easy)

Comments:

3. How would you rate your overall experience when contacting Customer Service to assist you with the TPCR process?\*

1 (Very Dissatisfied)     
  2     
  3     
  4     
  5 (Very Satisfied)     
  (Not Applicable)

Comments:

Please provide any final comments for future enhancements to the TPCR system.

Comments:

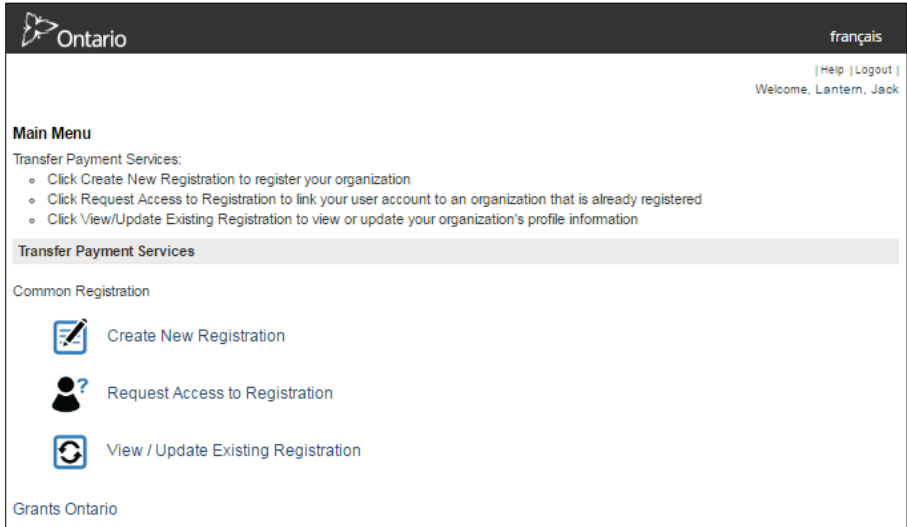
Done
Print

2. Once completed, click Done.

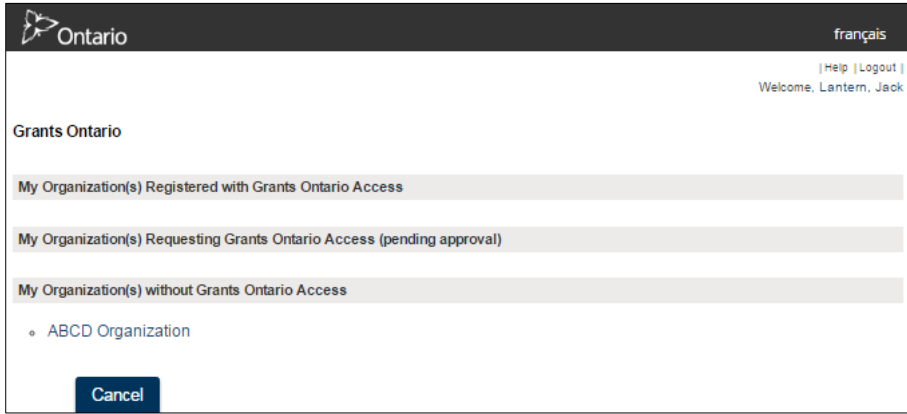
# Request Access to Grants Ontario

The option for requesting access to the Grants Ontario application system becomes available after you successfully submit your registration.

The TPCR *Main Menu* window shows a link to Grants Ontario.



1. Click the **Grants Ontario** link. The *Grants Ontario* window appears.



The window displays a list of all your registrations in three categories:

- (1) My Organization(s) Registered with Grants Ontario Access:** Organizations under this header have full access to Grants Ontario. Clicking on the organization name will take clients directly to their Grants Ontario Account.
- (2) My Organization(s) Requesting Grants Ontario Access (pending approval):** Organizations that have enrolled for Grants Ontario access and are waiting for a customer service rep to “Approve” their registration.
- (3) My Organizations without Grants Ontario Access:** Organizations that are registered in TPCR but not linked or registered in Grants Ontario.

- Select the organization for which you would like to request Grants Ontario access. The following window appears.

The screenshot shows a window titled "Grants Ontario" with a subtitle "Access to Grants Ontario - Demo TPCR MAESD". Below this is a section titled "Grants Ontario Access Type". It contains a dropdown menu labeled "Choose Access Type\*" and two buttons: "Cancel" and "Enrol".

- Choose an **Access Type** from the dropdown list:
  - **Standard Access**
    - Normal stakeholder access “rights”
    - User can access their organization record and grants history and apply for grants
  - **ASP Single Site Access (applies to After School Program users only)**
    - Second (low) level ASP user access
    - Specific to ASP program
    - User can see only their ASP program delivery location (site)
    - User can only provide ASP attendance reporting for site location
    - User cannot apply for a grant
  - **ASP Multi-Site Access (applies to After School Program users only)**
    - “Top level” ASP user access
    - Specific to ASP program
    - User can access ASP parent organization, all grants history and apply for ASP grants
- Click **Enrol**. After a few seconds the organization appears in the list under pending approval.

The screenshot shows a window titled "Grants Ontario" with three sections:
 

- My Organization(s) Registered with Grants Ontario Access**
- My Organization(s) Requesting Grants Ontario Access (pending approval)**
  - cini - Request ID: 1-581071868 at 30/11/2017 08:51
- My Organization(s) without Grants Ontario Access**
  - Demo TPCR Ltd
  - Demo Org One
  - Dummy Seven Corp
  - Demo TPCR MAESD

 A "Cancel" button is located at the bottom of the window.

When approval is granted, the organization name will appear under the **My Organization(s) Registered with Grants Ontario Access** heading.