

How to Upload Financial Statements:

1. Ensure your organization's profile is in Edit mode. You should see a Submit button at the bottom of your portal. If instead you see an Edit button, you must first click on Edit.
2. Click on the 'My Organization' tab (top right).
3. Click on 'Corporate Profile'.
4. Scroll down to the section called 'Financial Health and Stability'.
5. Follow the directions to upload financial statements for your organization's most recent completed fiscal year, including a statement of revenue and expenses, and a balance sheet.

How to Enter Board Members:

1. Return to the top of the page to click on the 'Lists' tab: Click on 'Board Members'.
2. Add information for EACH of your organization's board members. Click on the "+" (plus) sign to add board members. Click 'Save'.
3. Click on the 'Return to My Organization' button followed by the 'Lists' tab to review your list of board members and ensure all board members have been added.

How to Submit your Organization Registration or Updates:

1. Ensure your organization's profile is in Edit mode. You should see a Submit button at the bottom of your portal. If instead you see an Edit button, you must first click on Edit.
2. Review all the information you have entered by going to the 'Main' tab. Enter any revisions. Click 'Save Draft'.
3. Follow the above instructions to Upload Financial Statements and Enter Board Members.
4. Click 'Submit' to complete the submission of your Organization Registration.
5. You will receive an email confirming that OTF has received your Organization Registration and that OTF will begin verifying your information. Please allow up to 10 business days for OTF to verify your information.

Once your Organization has been verified, you will receive another email confirming you may start an application.

In the meantime, you can already work on your application outside of the online portal! The application questions and the assessment criteria for each Investment Stream can be found on our website at <http://www.otf.ca/apply-grant> (see Step #6). Save your responses on a Word document so that you can copy them onto the actual application form, once you are deemed eligible and are given access to our online system.

How to Enter Banking Information:

Once you have been notified by OTF that your grant request has been approved, you will be required to add your banking information if you haven't already done so.

1. From your main dashboard, select 'Applications' and then the 'Application List' tab to view a list of any applications associated with your organization
2. Click 'Open' to select one of your approved applications
3. Within the view of the Details section, click the 'Open' button next to the 'Update Bank Account' field. This will launch a separate "Update Bank Account" browser window.
4. Within the "Update Bank Account" window, click on "+ Add New Bank Account" to open an "Add/Edit Bank Account" pop-up window where you can add information for your organization's bank account
5. Click 'Save Changes' to save the banking information you have entered. You will be prompted to upload a scanned image (JPG, PDF, etc.) of a void cheque - this is required to validate your banking information.
6. Upon closing the pop-up window, you will note that the new bank account is available for selection.
7. If you wish to associate this new bank account with your existing application, proceed to the steps outlined below. Otherwise, simply close the "Update Bank Account" browser window.

How to Associate a Bank Account to an Approved Grant:

Once you have signed your OTF grant contract, and your application status has been updated to Approved, you will be required to associate a bank account with the approved grant

1. Click on Applications (top left): Click on 'Applications List' tab.
2. Click the Open button to open your approved grant.
3. In the Details section click the Open button next to the 'Update Bank Account:' field. This will launch a separate "Update Bank Account" browser window.
4. Select the Bank Account you would like to associate with the grant from the drop down list.
5. Click Update.