Frequently Asked Questions:

1. What are the advantages to having an online charitable registration system?
The online charitable registration system is designed to simplify the process, minimize the response time, and take the guesswork out of the submission requirements by eliminating confusion over which forms to use and which statutory provisions apply. Based on responses provided, the system will automatically make determinations about what information or fees might be needed. Because users must provide an email address when registering with the system, registration confirmation and filing reminders are sent automatically to them.

2. I'm nervous about using the online charitable registration system. What kind of support can I find to make it easier for me?
The online charitable registration system is designed to take the guesswork out of the requirements, since the system produces questions based on the responses provided. It is designed to be simple and intuitive. User guides and helpful checklists also are provided on the Charities Bureau website http://www.charitiesnys.com. Additionally, users can contact the Charities Bureau for assistance by calling 212-416-8401 during regular business hours or send an email to Charities.Bureau@ag.ny.gov.

3. What do I need to file the online Initial Registration Form?
Refer to the checklist of required items located on www.charitiesnys.com website for more information.

4. Who should register as a user?
The person who registers as a user and submits the registration will be the one contacted by the Charities Bureau for any questions and will receive all updates regarding the charity's registration. The charity's primary authorized officer (such as the president or executive director), the chief financial officer/treasurer or another member of the organization who is authorized to submit the registration should register. Or, if the organization has delegated registration to a third-party filer, that person should register. The user will need an email address in order to log into the online filing system and will be responsible for completing the registration process including any payments.

5. I have forgotten my login ID and/or password for the online charitable registration system. What should I do?
The user ID is simply your email address. If your email address has not changed, you can change a forgotten password online. The system will send a new password to the email address registered with that user. If your email address has changed, you should register for a new account.

6. When I enter my EIN, why do I get a message that says "EIN is invalid"?
The organization may not have applied to the IRS for an Employer Identification Number, or if the organization has recently received an EIN from the IRS, it may take up to 30 days for the IRS to update the EIN registration in its system.

Also, check that you have entered the EIN number correctly on the search screen.

7. What if the charity's name has changed since it registered?
The charity will need to file an amendment. This can be done by the Update Existing Registration feature.

8. Can the information entered on the registration be saved and completed at a later date?
Yes. To save data entered, click the "Save & Exit" button at the bottom of the form.

9. When will the Charities Division notify me regarding my registration?
Once the registration either approved or found to be incomplete, the Charities Bureau will send an email regarding the status of the registration.

10. Is there a time limit to complete the registration?
Registrations that are started, but not completed, will expire within 30 days of when they are started.

11. I'm a preparer for an organization. How do I open a registration on behalf of a client?
You should be able to create the charity's registration just like any other user, but must select "Yes" to the "Are you a 3rd party preparer?" question in the 3rd party section of the online form and fill in the required contact information.

12. How do I know if my payment was successful?
Once payment has been successfully processed, you will see a confirmation page that serves as your receipt. You can print this page for your records

13. I'm the primary authorized officer for an organization, and my preparer has asked to me to view and sign the organization's registration. How do I do that?
The online system will prompt the preparer to send the completed registration form in an email attachment to each of two required signers at their individual email addresses to be signed electronically. The signature requests will expire after twenty (20) days.

Once both signatures have been received, the user will receive an email with a link to the payment portal. The user may pay at that time or login at another convenient time. The filing cannot be submitted until the filing fee is paid.

14. I got an incomplete notice letter via snail mail from the Charities Bureau with a NY REG ID number in it. Can I use this number and complete my registration in the new online system?

No, you cannot use the online system unless you have submitted an online registration. Address all the issues listed in the incomplete notice letter through a paper mail to charities bureau. Once the registration has been approved by the charities bureau, then you can file an amendment to it using the new online system (using the NY REG ID).

15. The person who created an account and filled an online registration form left our organization. How do I have access to the charity that he/she started?

If the organization created by that user was approved by the Charities Bureau and you would like to see it, then create a new account with OAG and associate the approved charity using the NY REG ID (refer to

the online user guide for a step by step procedure on how to associate a charity). If you don't have the NY REG ID, go to the [Charities registry](#) and search with your organization name.

If the organization created by that user was submitted and not yet approved, wait for 5-10 business days for the organization to appear in [Charities registry](#). If it didn't appear in the directory, then create a new account with OAG and use "Register a New Organization" function and start the registration again.

16. One of the signatories has left the organization while the online registration is in progress i.e. the registration has been sent for signatures. How do I continue with the registration?

In this case, you need to start the registration process again. Use "Register a New Organization" function and fill out the registration form again.

17. I got an email that says registration is expired. What should I do to register at this point?

When the online form is not submitted within 30 days, the registration will expire. Which means that any attachments added and signatures done will be lost. In this case, log back into the [Charities Portal](#). A registration that has expired will still appear on the home page. Click on the charity name, and click on the button that says "Yes, Continue with the Registration" to complete the registration. All the information that you filled before will still be in place, except that the documents will need to be re-uploaded and signatures will need to be done again.

Note: If all the information in the online registration form has been filled and sent it out for signatures within 30days, signatories will have 15 days (beyond the 30 day window) to sign the document. Once the document has been signed by the signatory/signatories then the preparer of the registration will have 15 more days to make the payment is required.

18. Filing status in the online portal says waiting for applicant review. What does that mean? And what do I have to do?

At this point you will receive an email from Charities Bureau (email will be sent to the email address used for account creation) outlining what information needs to be changed.

Login to the online charities portal and click on the charity name to see more information about it. When the filing status says – "Waiting for Applicant Review" it means that the registration is incomplete and needs your review. Click on "Yes, Continue with Registration" button to address the issues that Charities Bureau identified with your registration. There will be a comment box at the end of each webpage for which the Charities Bureau needs more information that says "Evaluator comments." Comment boxes and the incomplete notice email you were sent have the information on what needs to be addressed. If there is no comment box in the page, then you don't have to take any action.

Make sure to check each page and see if there is any comment box and address the issues. Once all the issues have been addressed, then re-send the registration for "Signatures." Once the signatures are done, the registration will be auto-submitted to the Charities Bureau for re-review.

19. What is the significance of various filing statuses in the online system?

Filing Status	Significance
Saved but not submitted	Registration process has started but was not sent out for signatures.
Pending signatures	Registration is sent to both signatories (but either or both the signatories not yet signed the document).
Signatures Declined	One or both signatories declined to sign the document.
Pending payment	Registration is signed by the signatories and payment is required.
Pending Charities Bureau Review	Registration is signed by the signatories and/or required payment is done. (Registration is under review by the Charities Bureau. You don't have to take any action until you receive a letter from Charities Bureau).
Waiting for Applicant Review	Charities Bureau requested more information from the preparer.
Pending Charities Bureau Re-review	Preparer made changes to the registration as per the incomplete notice letter received from Charites Bureau, and the updated registration has been signed by the signatories. (You don't have to take any action on this until you receive a notice from the Charities Bureau.)
Approved	Registration has been approved by the Charities Bureau
Withdrawn	Registration has been withdrawn by the preparer.
Expired	Preparer failed to complete the registration including signatures and/or payment within 30 days OR preparer didn't respond to Charities Bureau request to update the information within 20 days.

20. Mouse keeps spinning for a longtime when I tried to answer a question. How can I continue?

Usually when you answer a question, system accepts it instantaneously. If the mouse keeps spinning for an unexpectedly long time, then try to refresh the page and continue. If the refresh did not work, then log out of the system and log back in. This should resolve the issue. If the issue keeps re-occurring then contact the Charities Bureau at 212-416-8401 or send an email to Char410help@ag.ny.gov.

Note: when you try to upload Bylaws, COI, or any other documents, it might take a minute for the system to accept them.

21. I am trying to make payment using an eCheck. Where can I find the routing number and account number?

If you are trying to information on your check, then see the bottom of the check for this.

22. My payment is declined? What is the reason?

If your payment is declined, then you might have entered incorrect bank information or there are not sufficient funds in your account to make the payment.

Click on "Make Payment" button to re-enter correct information and try again. If you are still seeing declined message, then follow-up with your bank to make sure that you are using the correct information and if there are sufficient funds.

23. I have never used DocuSign, how can I sign the document?

Refer to How to sign a document section of the online registration User Guide for step by step instructions on how to sign the document.