



Annual Filing Guide

CHAR500 Online User Guide

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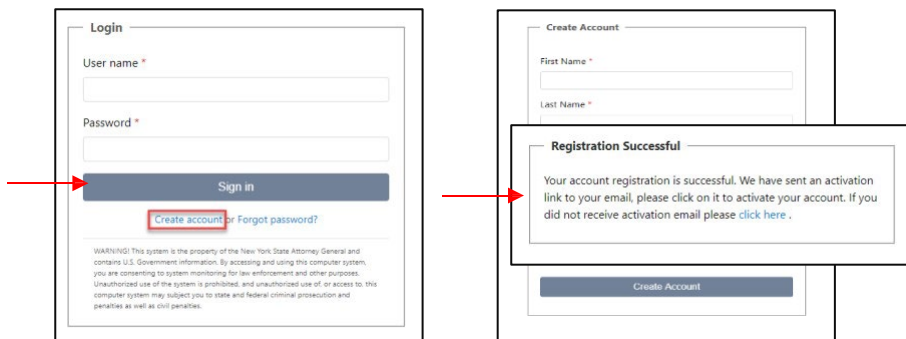
1 Login

The CHAR500 application portal lets charities in New York State file their annual financial disclosures online. If you are a first-time user of CHAR500, you need to create a new online account. Then you can log in to the portal and start the annual filing process.

NOTE: If you have already created an online account with Charities Bureau, either to do online registration or online annual filing, use the same account to login to CHAR500.

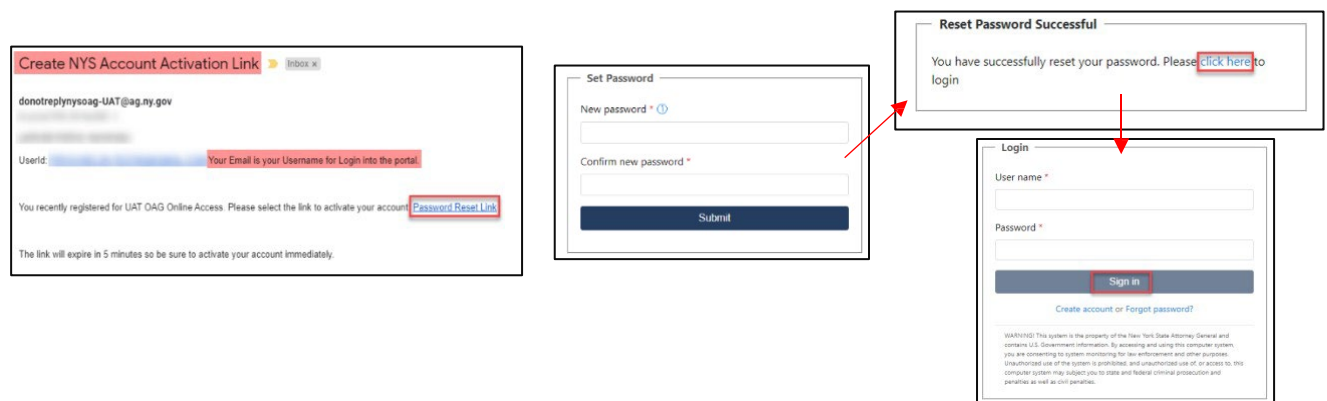
1.1 Create an account with the Charities Bureau

1. Navigate to charitiesfiling.ag.ny.gov and click 'Create account'.
2. Enter your first name, last name, phone number, and a valid email address in the corresponding fields (this email will be used for all further email communications).
3. Check the 'I'm not a robot' checkbox and click the 'Create Account' button. An account creation success message pops up.



1.2 Activate an Account and Login

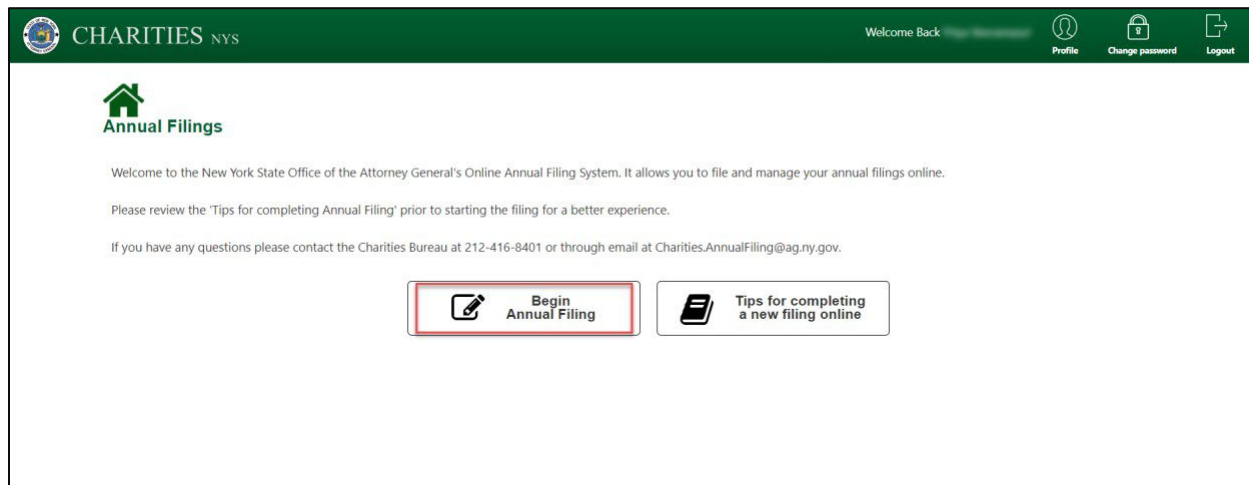
1. Go to the inbox of the email address provided during the account creation process (in step 2) and find the email from donotreplynysoag@ag.ny.gov with the subject line 'Create NYS Account Activation Link'. ***Please note that the link will expire if not activated within 5 minutes.***
2. If you did not find the email in your inbox, be sure to check the spam/junk folders.
3. Open the account activation email and click on the 'Password reset link'. You will then see an option to set up the new password.
4. Follow the password rules that you see as you set the password, re-enter it and then click 'Submit'. A 'Password set successful' screen pops up.
5. Click on the 'Click Here' link and login to the portal using the email address and password.



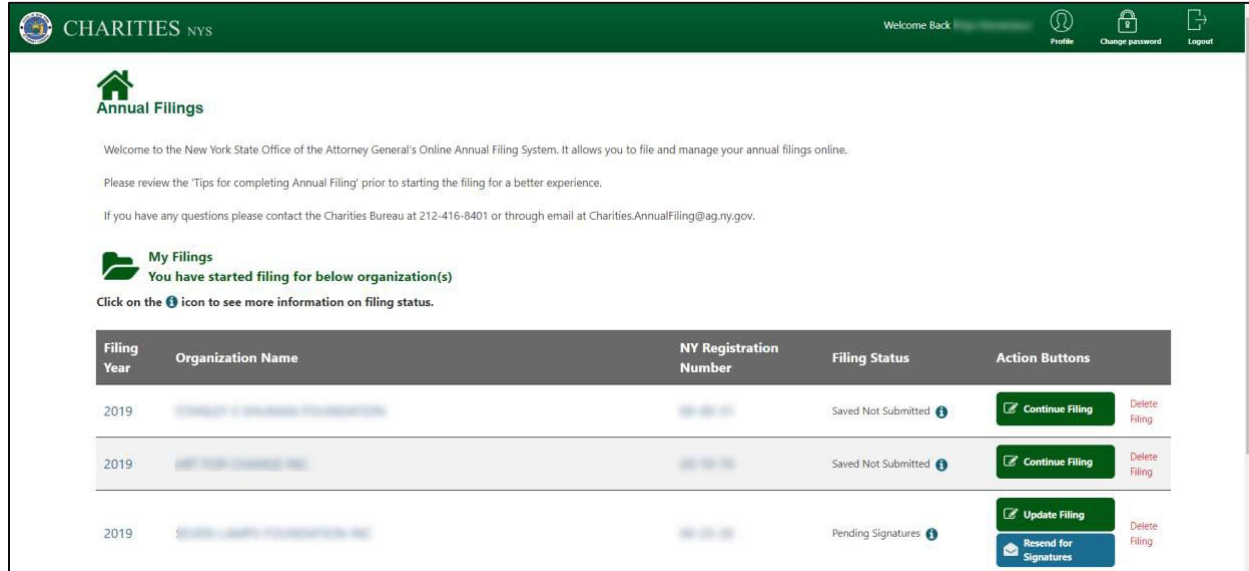
2 Annual Filing Portal

2.1 Home Page

If this is your first login to the annual filings portal, you will see two options after login. One starts the annual filing process, the other accesses a checklist of essentials you will need to complete the form, as well as this user guide. It is strongly recommended that you review both before you use this online filing option. Then click on the 'Begin Annual Filing' button to start the filing process for your organization.



NOTE: If you have already logged into the online annual filings portal before and started the annual filing process, then you see the filing information in a table (like below):



2.2 Enter New York Registration Number

If you are trying to electronically file for the same year as a paper filing that you have already submitted to the Charities Bureau OR you are trying to address an incomplete notice received for your paper filing, please exit this portal immediately. Proceeding further will delay the processing of your filing.

If you want to start a new annual filing using the online system for 2019 or later filing years, (that is, you fall under **NEITHER** category mentioned above) you may proceed.

1. Click on 'Begin My Annual Filing' button in the Home page.
2. Enter the New York Registration Number of your organization. This is a 6-digit number that can be found on the organization's registration approval letter. If you don't have this letter, you may use the Charities Registry at www.charitiesnys.com to find it using the organization name.
3. Enter the organization's fiscal year beginning.
4. Enter the organizations fiscal year ending and click search.

Note: Please note that the filing year corresponds with the fiscal year start date, ex: a 7/1/2020 to 6/30/2021 fiscal year is a 2020 filing.

The screenshot shows the Charities NYS website search interface. At the top, there is a green header with the logo and navigation links: 'Welcome Back', 'Profile', 'Change password', and 'Logout'. Below the header, a message states: 'Filings for fiscal year 2018 or prior must be filed on paper. Click here to download the paper forms.' The main form contains three input fields: 'New York Registration Number' (with three sub-inputs), 'Enter the Organization's Fiscal Year Beginning', and 'Enter the Organization's Fiscal Year Ending'. A note explains that the 6-digit registration number can be found on the organization's registration approval letter or via the Charities Registry. At the bottom of the form are 'Search' and 'Home' buttons.

If there is a valid charity associated with the Registration Number you entered, you will see the screen below.

The screenshot shows the Charities NYS website search results page. The header is identical to the previous screenshot. The main form now includes a 'Filing Year' dropdown menu set to '2019'. Below the form are 'Search' and 'Home' buttons. A message states: 'Based on the registration number entered, we have found the below organization. If this is not the organization you want to file for, please enter the correct NY Registration Number and search again.' Below this message is a table with the following data:

Organization Name	New York Registration Number	Registration Category
AMERICAN FOUNDATION FOR THE BLIND	000000	DUAL

At the bottom of the page is a 'Begin Annual Filing' button.

5. Click 'Begin Annual Filing' to start filling the online form.

If the Registration Number you entered is either incorrect or invalid, then please find the correct number and try again.

2.3 Fill Contact Information Section

Based on the New York Registration Number entered in the previous screen, some of the information in this section will be pre-filled on your behalf. Information fields with * are required for filing. You don't have to do anything to a pre-filled in field or question if the information given is correct. Update any information that needs updating in this filing process by answering the question and/or updating the field.

CHARITIES NYS Welcome Back Profile Change password Logout

Contact Information Third-party Preparer Registration Category Exemption Qualifications Annual Exemption Financial Information Filing Information Documents Review Signatures

Contact Information

Current Organization Name [Redacted] New York Registration Number [Redacted] Registration Category: DUAL

Has the organization's name changed since its last filing? Yes No

Employer Identification Number (EIN) [Redacted] Organization Type: Corporation What is the organization's IRS tax exempt status? [Redacted]

Please update organization's EIN if it is incorrect. If the organization is not exempt, select None

Fiscal Year End: 12/31 Has your fiscal year end changed? Yes No

Organization Email [Redacted] Organization Phone [Redacted] Organization Website [Redacted]

Organization's Addresses

Mailing Address [Redacted]

Has the organization's address changed since the last filing? Yes No

Is the Primary or Principal address the same as the Mailing address? Yes No

Primary or Principal address is where the organization is headquartered and performs its work. Do not enter an organization's post office box address here.

Primary Contact Information

First Name [Redacted] Last Name [Redacted] Title [Redacted]

Email [Redacted] Re-enter Email [Redacted] Phone [Redacted]

Home Save and Exit Save and Continue

1. If you want to change the name of your organization, answer 'Yes' to 'Has the organization's name changed since its last filing?' question and enter the updated name in 'Updated Organization Name' field. Note that you need to submit supporting documents about the name change at the end of this form (under the document upload section). If you are not amending the name, answer 'No' to this question.
2. If there is no EIN in the EIN field, then enter the number. If it is already filled and it needs to be corrected or updated, you can do that here.
3. Select your organization type.
4. Select organization's tax-exempt status (received from the IRS). If your organization does not have IRS tax-exempt status, then choose 'None.'
5. If your organization's fiscal year end has changed, answer 'Yes' to 'Has your fiscal year end changed?' question and enter the new fiscal year end in the 'Updated Fiscal Year End' field.
6. Enter or update the organization's email address in 'Organization Email' field.
7. Enter or update the organization's phone number in 'Organization Phone' field.
8. Enter or update the organization's website (if any) in the 'Organization Website' field.
9. Review the mailing address that was pre-filled. If it has changed then answer 'Yes' to the 'Has the organization's mailing address changed since the last filing?' and update the information as required in the mailing address field above.
10. If the organization's principal address is different from its mailing address indicate that by answering 'No' to the 'Is the primary address the same as the mailing address?' question. You can add the principal address here. If the addresses are the same, answer 'Yes'.
11. If your mailing address and principal address is not in New York State, then you see a question 'Does your organization have a New York State Address?'. If you do, then answer 'Yes' and enter the address. If you do not, then answer 'No' to the question.
12. Enter the organization's primary contact's first name, last name, title, email, and phone number in the corresponding primary contact information fields.
13. Select the type of IRS form used by your organization (IRS 990, 990PF, 990EZ etc) from the dropdown options available.
14. If your organization is a public charity (Your charity's IRS Tax Exemption Determination Letter

will include whether the organization is a public charity, a private foundation or exempt from IRS reporting requirements. If your organization is exempt from IRS reporting requirements or does not have federal tax exemption, please select the public charity option.) then answer 'Yes' to the child question populated on the page i.e. "Is your organization a public charity or other IRS 990 series filer other than a private foundation.". If your organization is not a public charity, then answer 'No' to this question.

15. A child question will be populated if the answer to above question is 'No'. Answer Yes to this question if your organization is a private foundation (Your charity's IRS Tax Exemption Determination Letter will include whether the organization is a public charity, a private foundation or exempt from IRS reporting requirements. If your organization is exempt from IRS reporting requirements or does not have federal tax exemption, please select the public charity option)

Note: Your organization will fall under either a 'Public' charity or 'Private' foundation. If you have answer No to both the questions above, you will need to refine your answer to proceed further.

At any point in the filing process, you can click 'Save & Exit' button to save the annual filing information you have entered and go to the home page again.

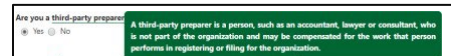
You can check where you are in the filing process using the train stops at the top of the page. The train stop for the section you are working on has a dark green background.

After filling all the required information, click the 'Save and Continue' button to go to the next page.

2.4 Fill Third-Party Preparer's Information

If you are a third-party preparer doing the annual filing on an organization's behalf, answer 'Yes' to 'Are you a Third-Party Preparer?' and enter your contact and address information in the popup that appears below. If you are not a third party preparer, click on the 'Saved and Continue' button and go to the next page.

NOTE: You can access the definition of the underlined words in the portal by hovering your mouse over them.

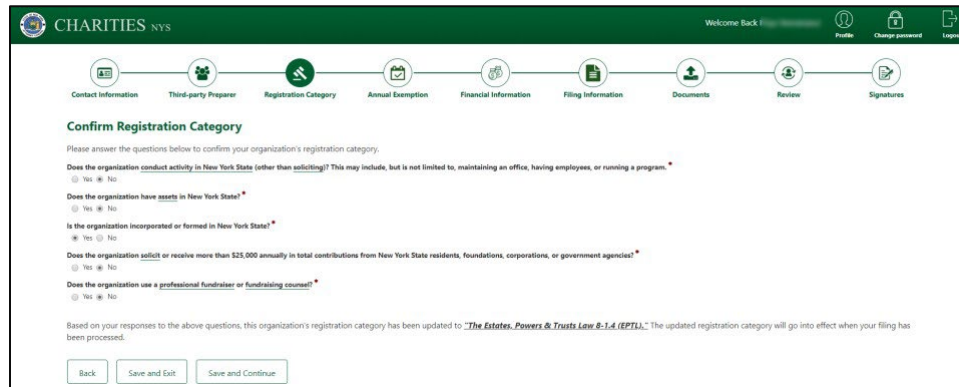
The screenshot shows the CHARITIES NYS portal interface. At the top, there is a navigation bar with the CHARITIES NYS logo and a "Welcome Back" message. Below the navigation bar is a progress indicator with icons for "Contact Information", "Third-party Preparer", "Registration Category", "Exemption Qualifications", "Annual Exemption", "Financial Information", "Filing Information", "Documents", "Review", and "Signatures". The "Third-party Preparer" step is highlighted with a dark green background. The main content area is titled "Third-party Preparer" and contains a form with the following fields: "Are you a third-party preparer?" (radio buttons for Yes and No), "First Name", "Last Name", "Title", "Firm Name", "Phone", "Email", "Address" (Address Line 1, Address Line 2), "City", "State", "Postal /Zip Code", and "Country". At the bottom of the form are three buttons: "Back", "Save and Exit", and "Save and Continue".

2.5 Registration Category

This section verifies your organization's registration category which was pre-filled in the contact section. Verification is done through a series of questions.

Hovering your mouse over an underlined word in the form provides more information on its meaning.

Depending on your answers to the questions, if there is any change to the registration category you are notified by an onscreen message.



The screenshot shows the 'Confirm Registration Category' section of the CHARITIES NYS online form. At the top, there is a navigation bar with the CHARITIES NYS logo and a 'Welcome Back' message. Below the navigation bar is a progress indicator with icons for Contact Information, Third-party Preparer, Registration Category (highlighted), Annual Exemption, Financial Information, Filing Information, Documents, Review, and Signatures. The main content area contains five questions with radio button options for 'Yes' and 'No'. The questions are: 1. Does the organization conduct activity in New York State (other than soliciting)? 2. Does the organization have assets in New York State? 3. Is the organization incorporated or formed in New York State? 4. Does the organization solicit or receive more than \$25,000 annually in total contributions from New York State residents, foundations, corporations, or government agencies? 5. Does the organization use a professional fundraiser or fundraising counsel? Below the questions, a message states: 'Based on your responses to the above questions, this organization's registration category has been updated to: "The Estates, Powers & Trusts Law §-1.4 (EPTL)". The updated registration category will go into effect when your filing has been processed.' At the bottom, there are three buttons: 'Back', 'Save and Exit', and 'Save and Continue'.

If your registration category has not changed then you do not see any message.

Click 'Save and Continue' after answering the questions to go to the next page.

2.6 Contribution Information

This section confirms your organization's contributions information.

1. Answer Yes/No to the first question that appears on the page depending on if your organization solicit or received any contributions from the New York State in the fiscal year.
 - a. If no, then you can proceed to the next section by clicking on the 'Save and Continue' button.
2. If you answered 'Yes' to the above question, then a child question will be populated. Choose the total contributions received in the New York State in the fiscal year from one of the available options.

2.6 Exemption Qualifications

Some organizations do not see this section. If you do not see it, go to section [2.7](#).

This section establishes whether your organization qualifies for an exemption statute. CHAR500 determines whether your organization qualifies using a series of optional questions. If you see this section and would like to see whether your organization can claim exemption, then answer 'Yes' to 'Would you like to check if your organization meets any exemption criteria?'. If you don't want to answer the exemption questions, then answer 'No' and click the 'Save and Continue' button to go to the next page.

2.7 Annual Exemption

This section verifies the organization's annual filing category. The questions are all yes/no.

Based on your answers to these questions, CHAR500 determines the category under which you are required to file this year. Click 'Save and Continue' to go to the next page.

2.8 Financial Information

This section asks you to provide financial information to the state (this information is also disclosed on an organization's IRS form, unless it is a 990N filer). The questions you see in this section depends on your result in the annual exemption section.

1. Choose the IRS form your organization uses (990, 990EZ, 990PF, 990N or 1120, 1041). You will upload the same IRS form in the document upload page at the end of this section.

2. Enter the financial information. Depending on the IRS form you picked above, you will be asked to enter information such as total contributions, total revenue, total assets, net assets, and so on. You may refer to this IRS document when answering these questions. Also, there are instructions in the online form on where to find these numbers on your IRS document.

NOTE: Depending on the numbers you enter here, you may be asked to upload a Certified Public Accountant's audit report or financial review in the document upload section at the end of this form. You will be informed what to upload in the online form.

1. If your organization is either planning to close or withdraw its Charities Bureau registration or dissolve the organization, please check the appropriate option. If you are not planning to do any of those things, then select the 'None' option.
2. of those things, then select the 'None' option.
3. **** You may not see this question**** If this is the final filing for the organization then answer 'Yes' to the 'Is this your final filing with New York State?' question.

Click 'Save and Continue' to go to the next page.

2.9 Filing Information

****You may not see this section depending on your answer to the 'Organization Type' question on the 'Contact Information' section of the form****

If your organization used a professional fundraiser or fundraising counsel, then answer 'Yes' to the question. If not answer 'No'.

The screenshot shows the 'Filing Information' section of the CHARITIES NYS online form. The navigation bar at the top includes 'Contact Information', 'Third-party Preparer', 'Registration Category', 'Annual Exemption', 'Financial Information', 'Filing Information' (highlighted), 'Documents', 'Review', and 'Signatures'. The 'Filing Information' section contains two questions with radio button options for 'Yes' and 'No':

- Did the organization use a professional fundraiser or fundraising counsel to solicit contributions in New York State? *
- Did the organization receive government grants during this fiscal year? *

Below the questions is a note: "Please list EACH government grant awarded by a domestic (federal, state or local) agency; interstate or intergovernmental agency; and state or local authorities. Please include any funding from municipalities that include the organization in their standard budgeting (for example, a volunteer ambulance corps)." At the bottom of the form are three buttons: 'Back', 'Save and Exit', and 'Save and Continue'.

If answered 'Yes', fill in the information below.

1. Type of professional fundraiser – Choose either a fundraising professional or a fundraising counsel.
2. Enter the name of the fundraiser under the 'Name of Firm' field.
3. Enter the professional fundraiser's New York Registration Number. You can get this information from the professional fundraiser or the counsel. Please note that the fundraiser must be registered in New York State in order to operate in New York.
4. Enter the contract start and end dates in the date fields.
5. Enter the phone number and mailing address of the professional fundraiser.
6. Enter a detailed description of the services provided by the fundraiser. Please enter a minimum of 100 characters.
7. Enter a detailed description of the compensation arrangement for the fundraiser. Please enter a minimum of 100 characters.
8. Enter the dollar amount paid to the fundraiser.

NOTE: If you are using more than one professional fundraiser or fundraising counsel, you may add their information by clicking the 'Add Additional Professional Fundraisers Information' button.

If your organization received any government grants during the fiscal year then answer 'Yes' to the government grants questions. If not answer 'No'.

If answered 'Yes', you are required to provide information for the grant(s).

1. Enter the name of the government grant agency.
2. Enter the total grant amount received from the given agency.

Did the organization receive government grants during this fiscal year?*

Yes No

Please list EACH government grant awarded by a domestic (federal, state or local) agency; interstate or intergovernmental agency; and state or local authorities. Please include any funding standard budgeting (for example, a volunteer ambulance corps).

If you have more than one government grant click on "+Add Government Grants Information" to add more entries.

Name of Government Agency*	Grant Amount*
<input type="text"/>	<input type="text"/>

+ Add Government Grants Information

Back Save and Exit Save and Continue

If you are receiving grants from more than one government agency, click '+Add Government Grants Information' to add more entries.

Click 'Save and Continue' to go to the next page.

2.10 Document Upload section

IMPORTANT: CHAR500 can only accept PDF documents less than 10 MB in size. If you have documents in other formats or your document is greater than 8 MB in size, then [click here](#) to see the instructions on how to convert a document into PDF and [click here](#) to compress the files.

Only one document per section is allowed. If you have more documents, you may upload up to 5 documents under the 'Other Documents' section. You must upload ALL PAGES of the required documents.

If your organization files Schedule B to IRS Form 990 with the Internal Revenue Service, please remove it from your filings before uploading your documents, and do not include Schedule B in any of your filings with the Charities Bureau.

CHAR500 lists the documents that need to be uploaded, depending on your answers to the form questions. Under each upload section, click 'Choose Files' and select the document you want to upload. Then click the 'Upload' button to upload it in the online form. Once the document is successfully uploaded, the information is added to the tabular form (see screenshot).

Documents

You must upload **ALL PAGES** of the required documents below. Please note that our online system allows **PDF** documents to be uploaded as a single document into multiple files. Only complete documents are accepted. Only **1 document** is allowed per section. If you have more documents you may upload them under the 'Other Documents' section.

Certified Public Accountant's Audit Report*

No file chosen

(Before Upload)

Documents

You must upload **ALL PAGES** of the required documents below. Please note that our online system allows **PDF** documents that are **less than 10 MB** in size. [Click here](#) for instructions on how to convert a document into multiple files. Only complete documents are accepted. Only **1 document** is allowed per section. If you have more documents you may upload them under the 'Other Documents' section.

Certified Public Accountant's Audit Report*

File Name	Document Type	Delete
Audit.pdf	AUDIT	<input type="button" value="Delete"/>

(After Upload)

If you accidentally upload the wrong document, you must delete it before uploading the correct one.

After uploading all the required documents, click 'Save and Continue' to go to next page.

2.11 Review Page

In this section, please review all the information that you entered in the form carefully. After reviewing, check the acknowledgement at the bottom and then click 'Save and Continue'.

CHARITIES NYS Welcome Back | Profile | Change password | Logout

Contact Information | Third-party Preparer | Registration Category | Annual Exemption | Financial Information | Filing Information | Documents | **Review** | Signatures

Review

Contact Information

Filing Year
2019

Charity Name
MIDWIVES FOR MIDWIVES AND WOMEN'S HEALTH INTERNATIONAL, INC.

NY Registration Number
20-70-10

Registration Category
DUAL

Has the organization's name changed since its last filing? *
No

EIN
522273326

Organization Type
Corporation

What is the organization's IRS tax exemption status?
501(c)(3)

Fiscal year end
12/31

Has the fiscal year end changed?
No

Organization Email
yxx07320@ucmo.edu

Organization's phone number
8163282907

Address

Organizations Mailing Address
1081 High Falls Road, Catskill, NY 12414-5604, UNITED STATES

Has the address for the organization changed since the last filing?
No

Is the Primary or Principal address the same as the Mailing address?
Yes

Primary Contact Information

First Name
Priya

Last Name
Veeramasu

Title
Veeramasu

Email
priya1993.29@gmail.com

Phone
8163282907

3rd Party Preparer

If you need to update any information, use the train at the top of the page or 'Edit Information' button below to go back to the appropriate section.

I acknowledge that all of the information supplied is correct. *

Edit Information | Exit | Save and Continue

2.12 Signatures

All organizations (except trusts) are required to enter information for two different signatories.

1. Enter the first name and last name of the first signatory.
2. Choose the title of the signatory from the available options.
3. Enter a valid email address of the signatory. Please review the email address carefully as the electronic signature request is sent to this address.
4. Fill all the required information for the second signatory.

Click 'Send out for Signatures' to send the signature requests to the signatories. A pop-up will prompt you to verify the email addresses of the signatories. After validating, click 'Send for Signatures' to send the signature requests.

CHARITIES NYS Welcome Back Profile Change password Logout

[Contact Information](#)
[Third-party Preparer](#)
[Registration Category](#)
[Annual Exemption](#)
[Financial Information](#)
[Filing Information](#)
[Documents](#)
[Review](#)
[Signatures](#)

Signatures

Certification requires two signatures, one from the organization's president or authorized officer/trustee and the other from the chief financial officer, treasurer or other person with fiscal responsibility for the organization. Both signatories must certify under penalties for perjury that they reviewed this Annual Filing Statement, and that to the best of their knowledge and belief the information contained in this form is true, correct and complete in accordance with the laws of the State of New York which are applicable.

Enter the signatories' information below.

First Name * <input type="text"/>	Last Name * <input type="text"/>	Title * President <input type="button" value="v"/>	Email * <input type="text"/>	Re-enter Email * <input type="text"/>
First Name * <input type="text"/>	Last Name * <input type="text"/>	Title * Chief Financial Officer <input type="button" value="v"/>	Email * <input type="text"/>	Re-enter Email * <input type="text"/>

****Please note that the signatories may experience up to 15-minute delay in receiving the signature request emails. ****

Click the 'Home' button to navigate to the home page.

3 Filing Statuses

During the annual filing creation and completion process you may see one (or more if you have more than one annual filing under your account) of the below filing statuses.

3.1 Saved Not Submitted

This status indicates you have started the annual filing but not completed it.

What needs to be done?

Click the 'Continue Filing' button to complete filing the form, upload all the required documents and send the filing for signatures.

How long do I have before the filing expires?

30 days. During this time, you will be sent reminder emails.

3.2 Pending Signatures

This status indicates you have sent the annual filing to the signatories.

What needs to be done?

Advise the signatories of the organization to complete the signature requests. Please advise them to check the inbox of the email address you entered in the Signatures section of the form, including the spam or junk folders and locate an email from NYS OAG Via DocuSign.

If the email addresses of the signatories entered in the form are valid but they did not receive the signature request email, then use the 'Re-Send Signatures' button to resend the signature request emails. Please note that by resending the email, any active emails sent by DocuSign before this request are invalidated.

If the email address of the signatories entered in the form are invalid and you want to update them, use the 'Update Filing' button. Please note that clicking this button removes any signature requests that were already signed by the signers. Navigate to the end of the form, update the signature emails and re-send for signatures.

How long do I have before the filing expires?

If this is the first time you sent the signature requests, you have 15 days to complete the signatures before the filing expires. But if this is not your first time sending the signature requests then you have only 5 days to complete signatures before the filing expires.

3.3 Pending Payment

When your annual filing is signed by the required signatories, you are notified via email that there is a payment pending. The email includes the amount that needs to be paid.

What needs to be done?

Click the 'Make Payment' button and complete the payment process.

How long do I have before the filing expires?

15 days

3.4 Incomplete Submission

If you receive an incomplete notice letter from the Charities Bureau:

What needs to be done?

You can view the incomplete notice sent by the Charities Bureau by clicking the 'View Incomplete Notice' button.

After reviewing the incomplete notice, click the 'Update Filing' button to update and complete the form information. After correcting all the items requested by the Charities Bureau, you need to re-send the filing for signatures.

How long do I have before the filing expires?

20 days to correct the information and resend for signatures.

3.5 Signature Declined

If one of your signatories declines to sign your filing:

What needs to be done?

Click 'Update Filing' to update the annual filing and re-send it for signatures.

How long do I have before the filing expires?

15 days

3.6 Incomplete Filing

If you received an incomplete notice letter from the Charities Bureau requesting that you update the information in the filing, but you did not update and re-sign it within the 15 days, your filing will be tagged 'Incomplete' in our charity's registry. Please note this may impact your organization's ability to receive funds from certain funders.

What needs to be done?

View the incomplete notice sent by the Charities Bureau by clicking the 'View Incomplete Notice' button.

After reviewing the incomplete notice, click 'Update Filing' to update the required information. After correcting all the items requested by the Charities Bureau, you must re-send the filing for signatures.

3.7 Expired

Your annual filing expires if you fail to complete it within the given time. Note that all the information you provided before expiration is saved in the online form.

What needs to be done?

Click 'Resume Filing' to re-start the annual filing, update any information required, upload any necessary documents and send for signatures.

3.8 Processed

Your annual filing has been processed by the Charities Bureau and no further information is required at this point.

What needs to be done?

None. No further action is required.

3.9 Pending Charities Bureau Review

Your annual filing has been submitted to Charities Bureau for review.

What needs to be done?

None. No further action is required. You will be notified via email if the filing is processed or if more information is required.