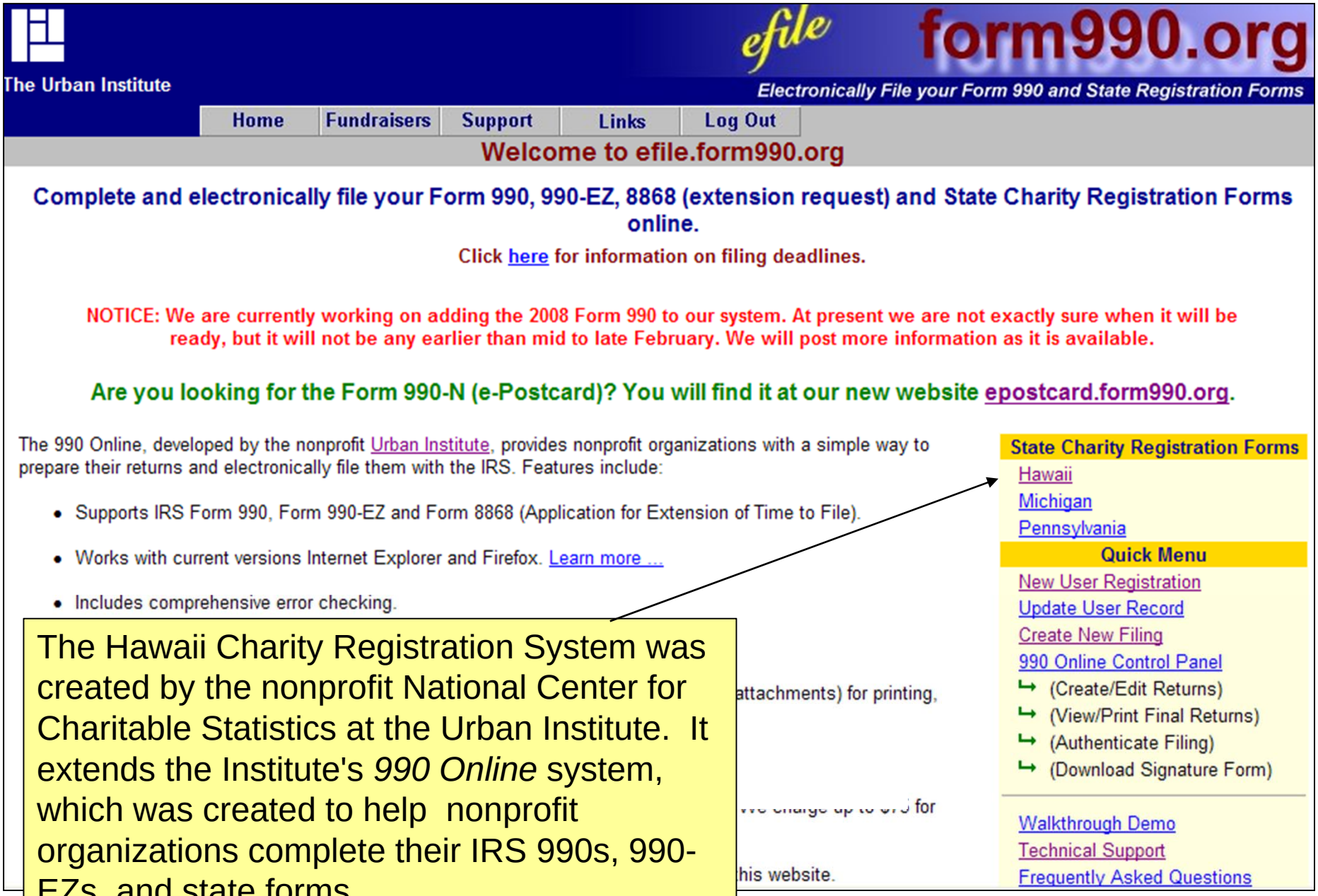
Hawaii Charity Registration Tutorial

Developed by the National Center for Charitable Statistics
at the Urban Institute
on behalf of
The State of Hawaii, Department of the Attorney General



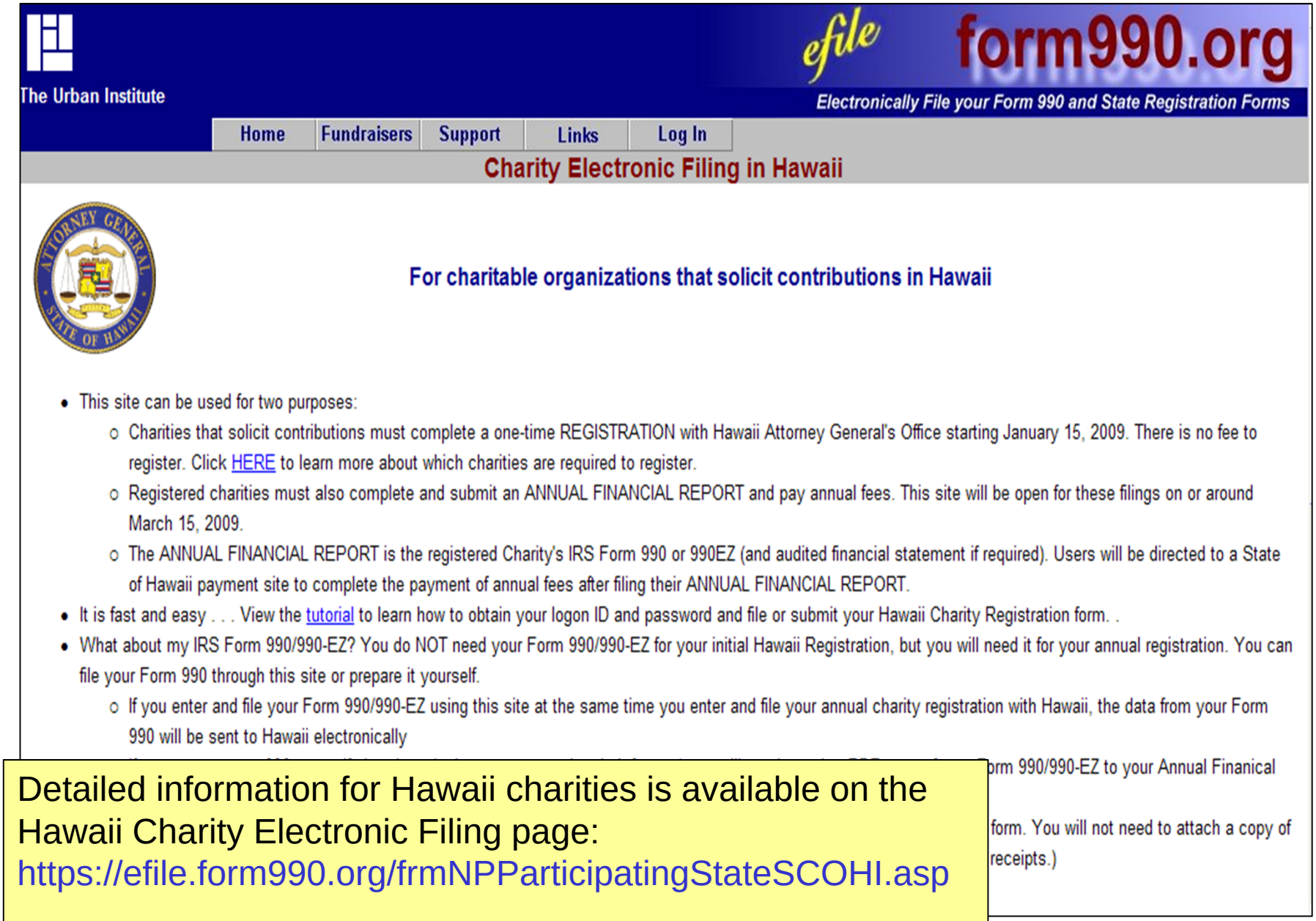
The Hawaii Charity Registration System was created by the nonprofit National Center for Charitable Statistics at the Urban Institute. It extends the Institute's *990 Online* system, which was created to help nonprofit organizations complete their IRS 990s, 990-EZs, and state forms.

The Registration Process

- Completing the Hawaii Registration Form is a lot like purchasing an item from Amazon or other e-Commerce sites, but you only need to do it **once.**
- ***Get Your Login ID*** – First you must set up an account for yourself
- ***Complete the Registration Form*** - Like selecting your books at Amazon.
- ***Verify the Form*** – The system makes sure that all the dollar amounts add up and are consistent, and that all required fields are completed -- like viewing the list of items you're purchasing from Amazon.
- ***Electronically "Sign" the Form (Authenticate) and then Mark the Form as Complete*** – Like verifying that you really want to place the order and then pressing Submit
- When the form has been accepted, you will receive an email.

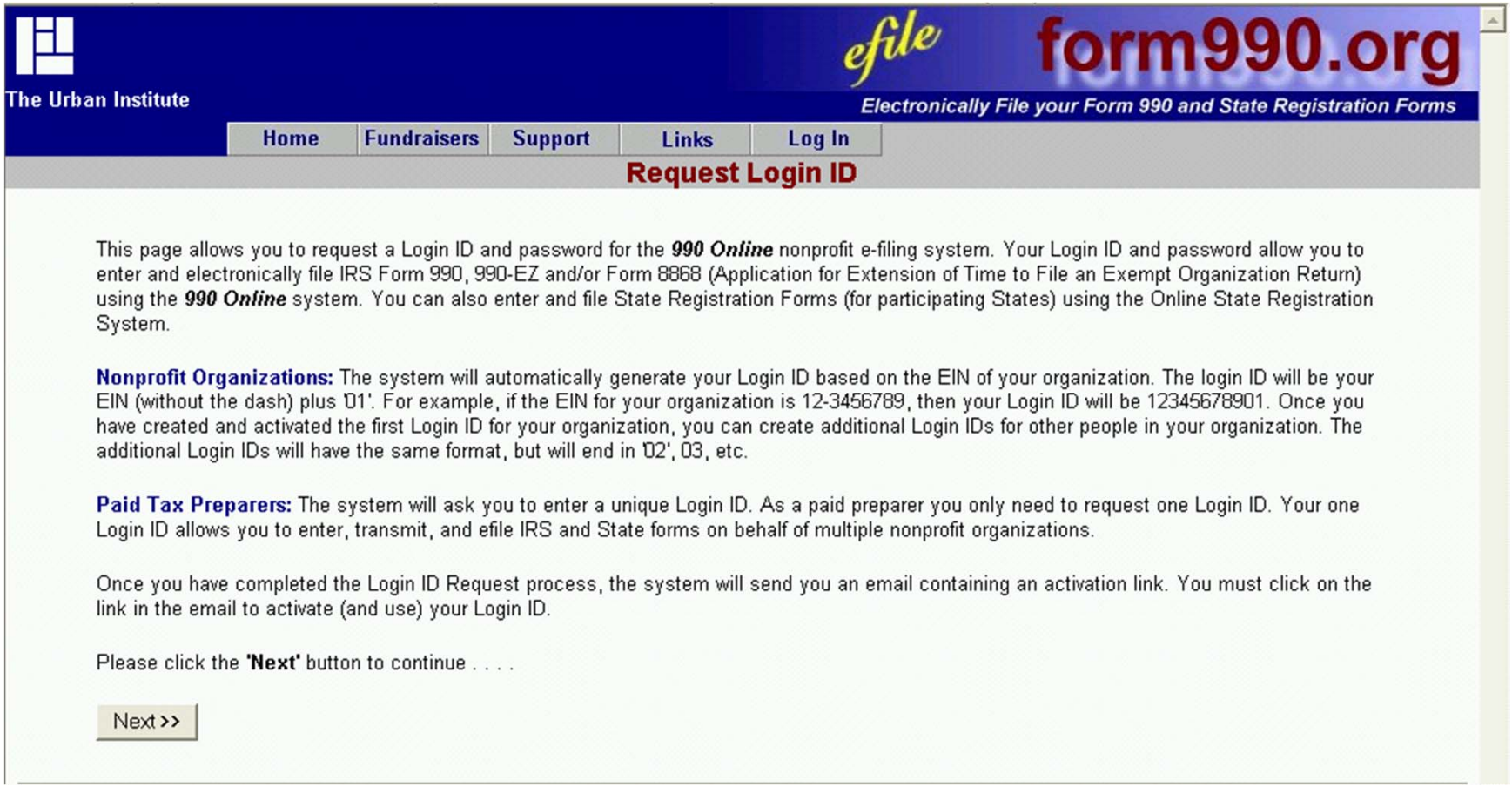
Coming Soon:
The Annual Filing Process

- Each year, registered charities must electronically submit their IRS Form 990, 990-EZ or -- for organizations that complete neither -- a simple Hawaii Charity Transmittal Form.
- Charities must also pay an annual fee through the State of Hawaii's payment portal.
- This system should be available on or around March 15. Registered charities will be notified by e-mail when it becomes available.

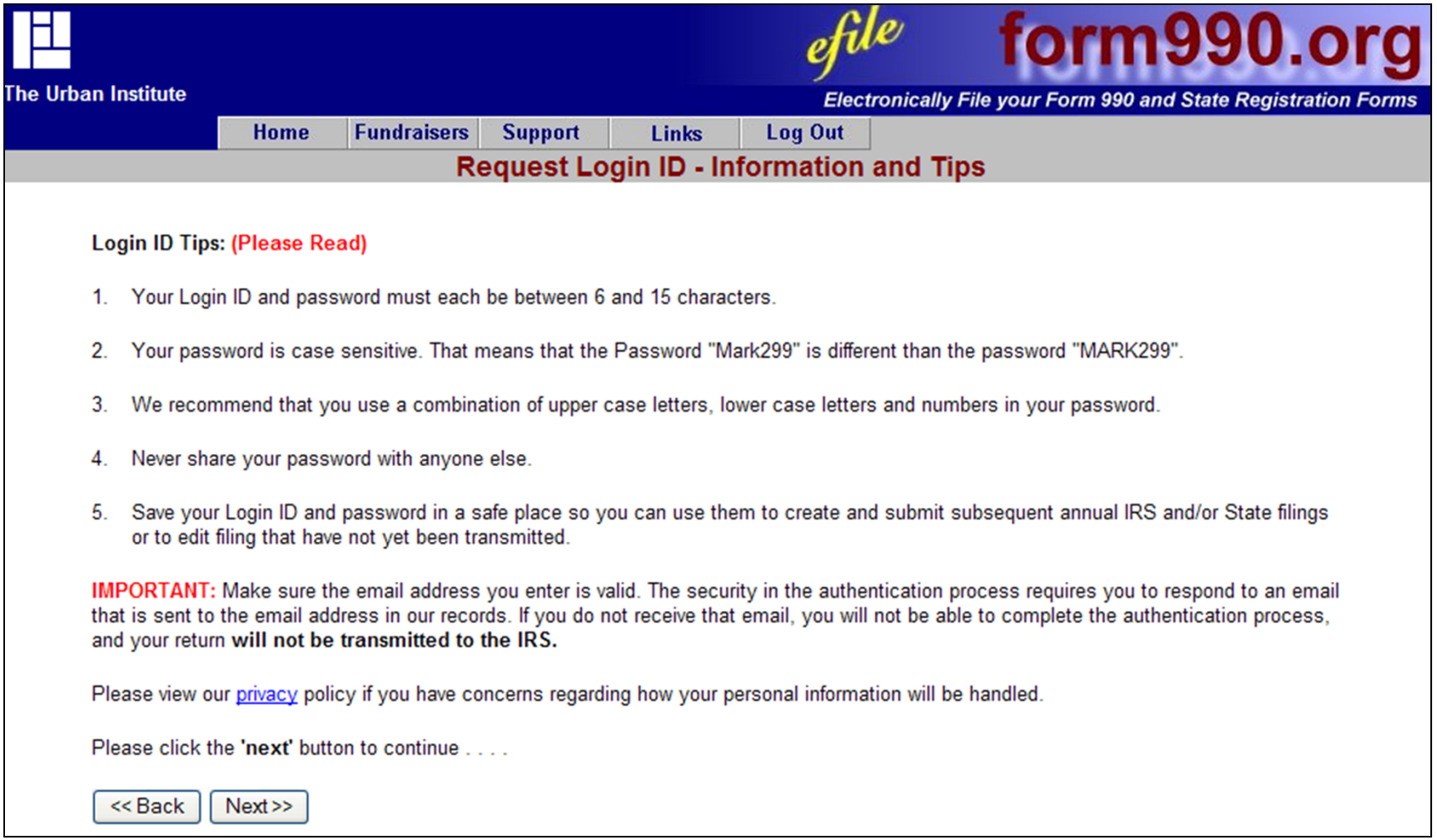


Detailed information for Hawaii charities is available on the Hawaii Charity Electronic Filing page: https://efile.form990.org/frmNPParticipatingStateSCOHI.asp

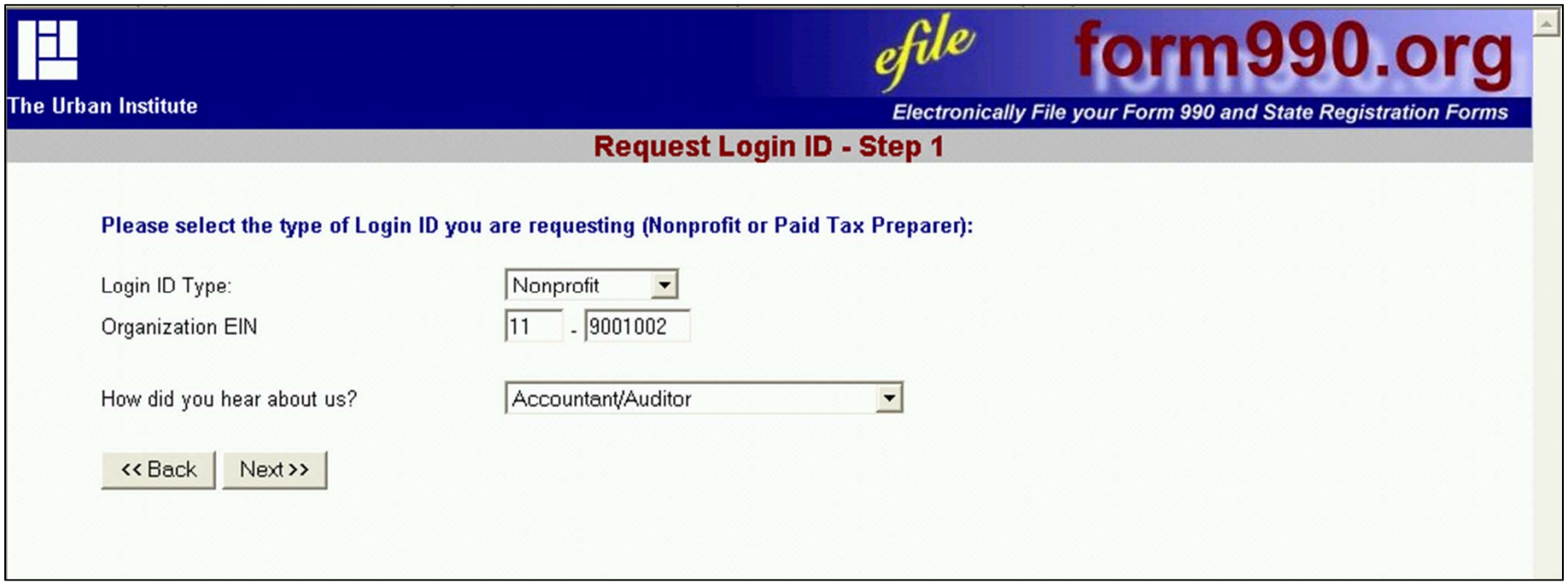
First Step: Get Your Login ID



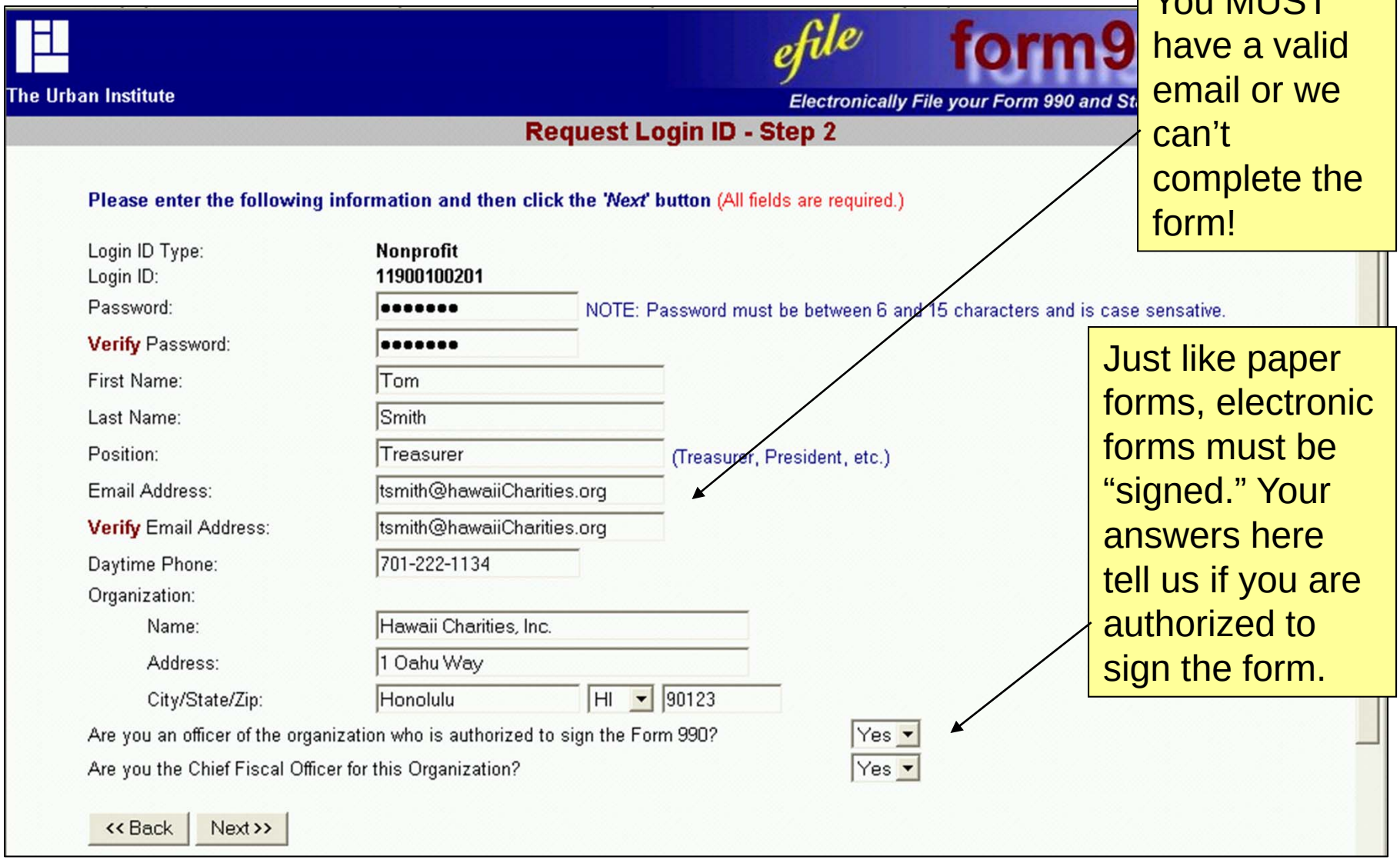
Remember: To ensure security, passwords are “cAsE-Sensitive”



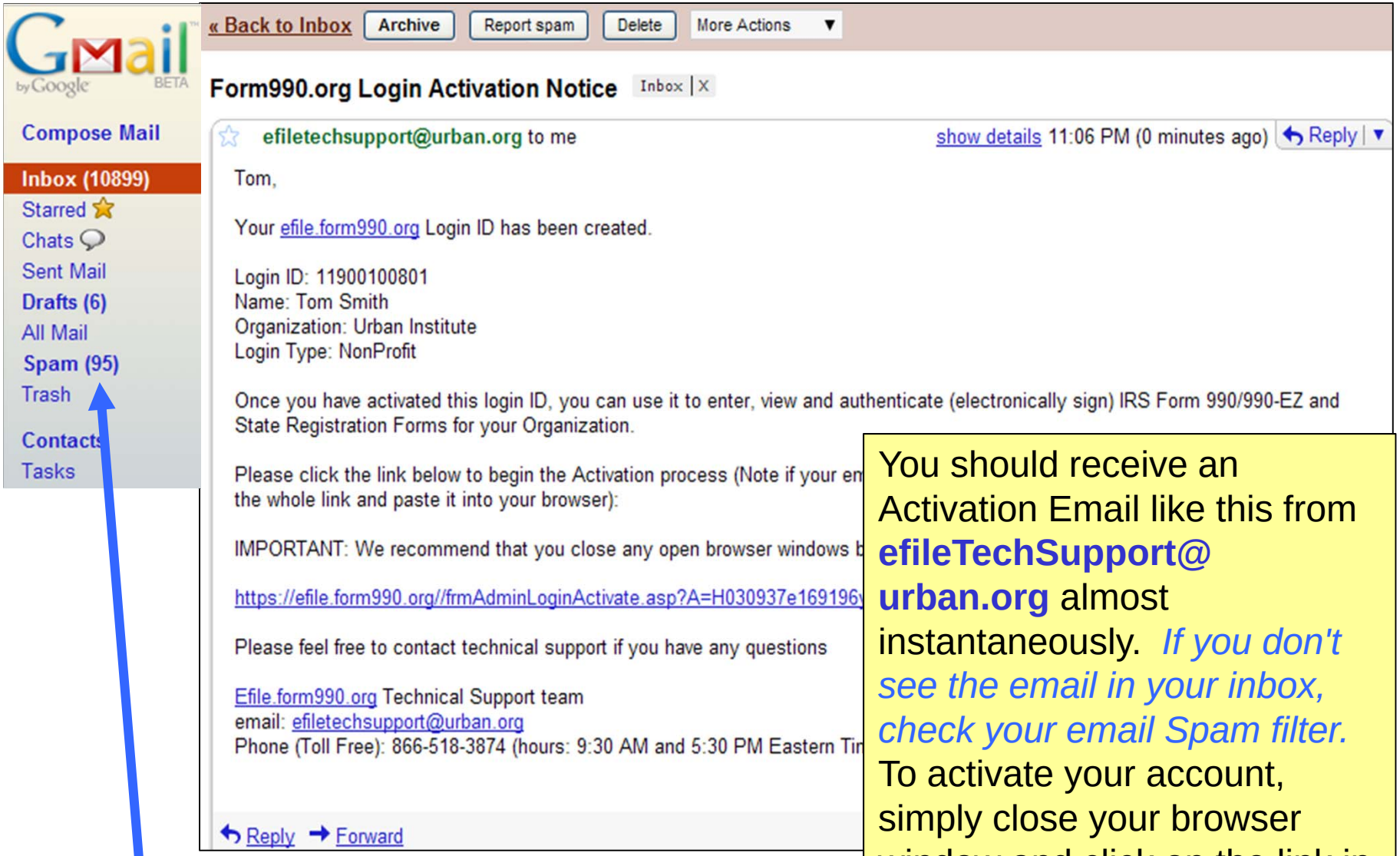
CPA or tax professional? Register as a Paid Preparer and use *990 Online* for all your registration forms and annual filings



VERY Important!



You are *almost* done getting your Login ID… but you must respond to the **e-mail** we send you



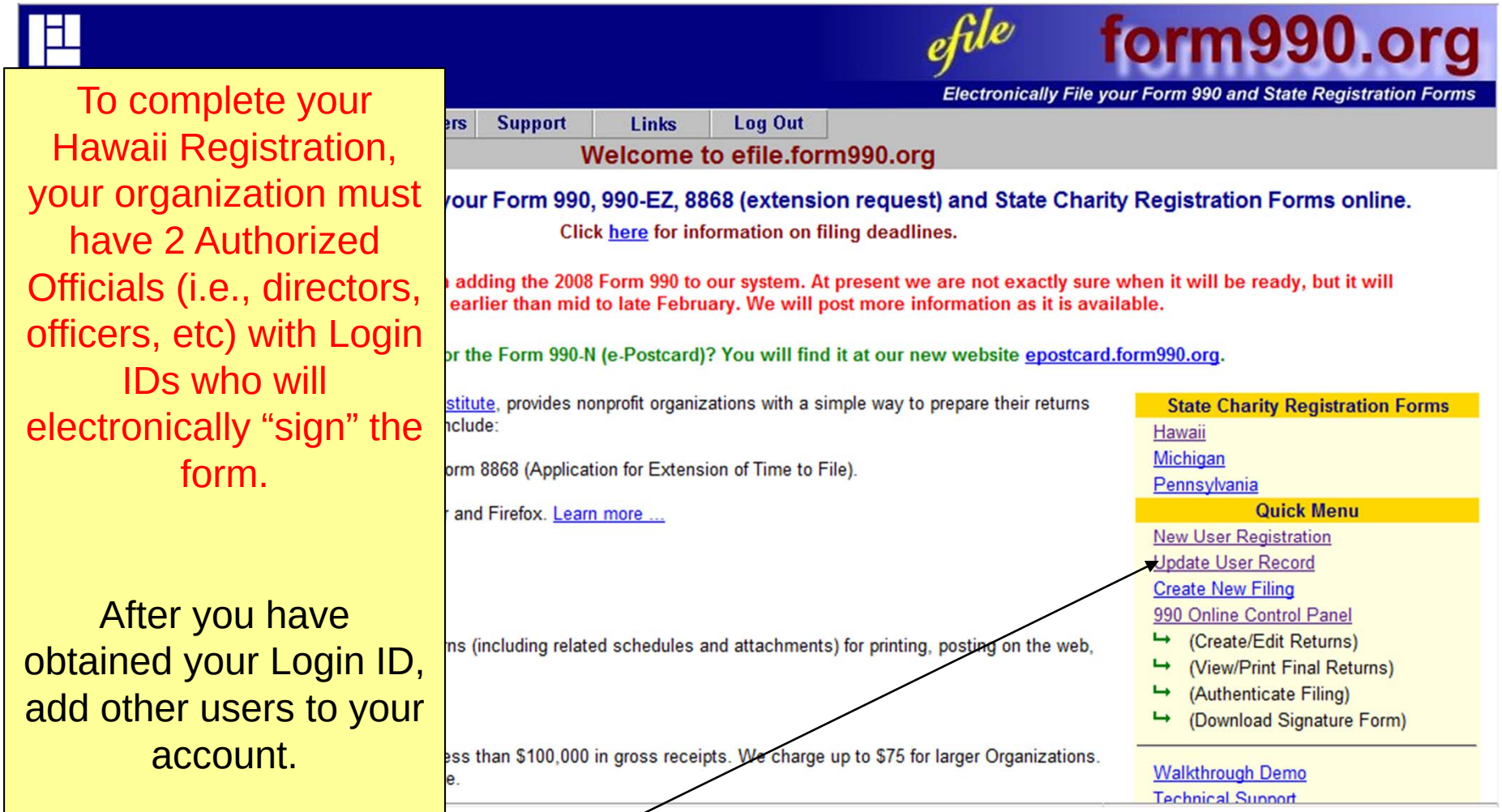
Gmail spam filter

You should receive an Activation Email like this from **efileTechSupport@urban.org** almost instantaneously. *If you don't see the email in your inbox, check your email Spam filter.* To activate your account, simply close your browser window and click on the link in the email.

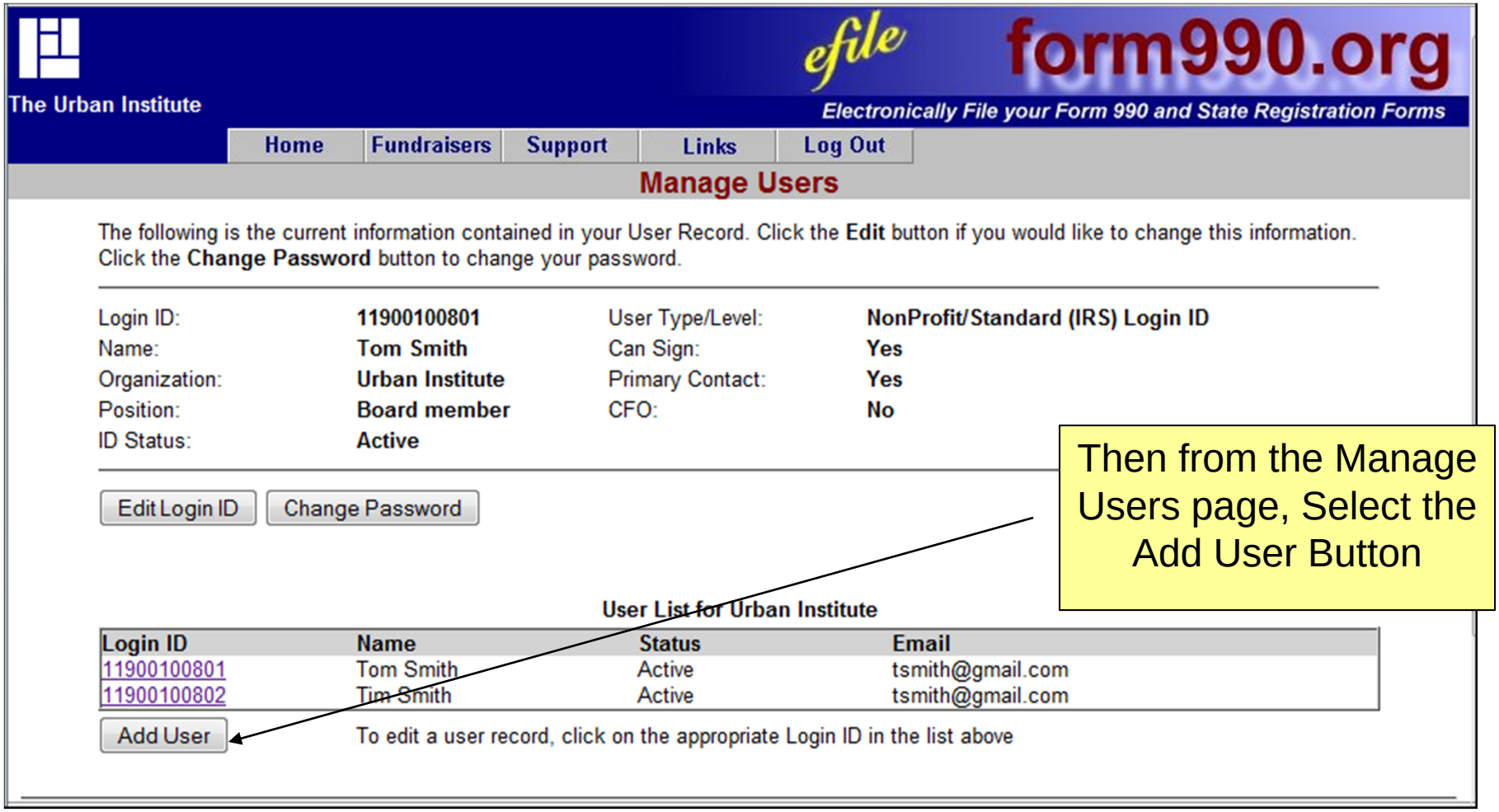
To complete your Hawaii Registration, your organization must have 2 Authorized Officials (i.e., directors, officers, etc) with Login IDs who will electronically “sign” the form.

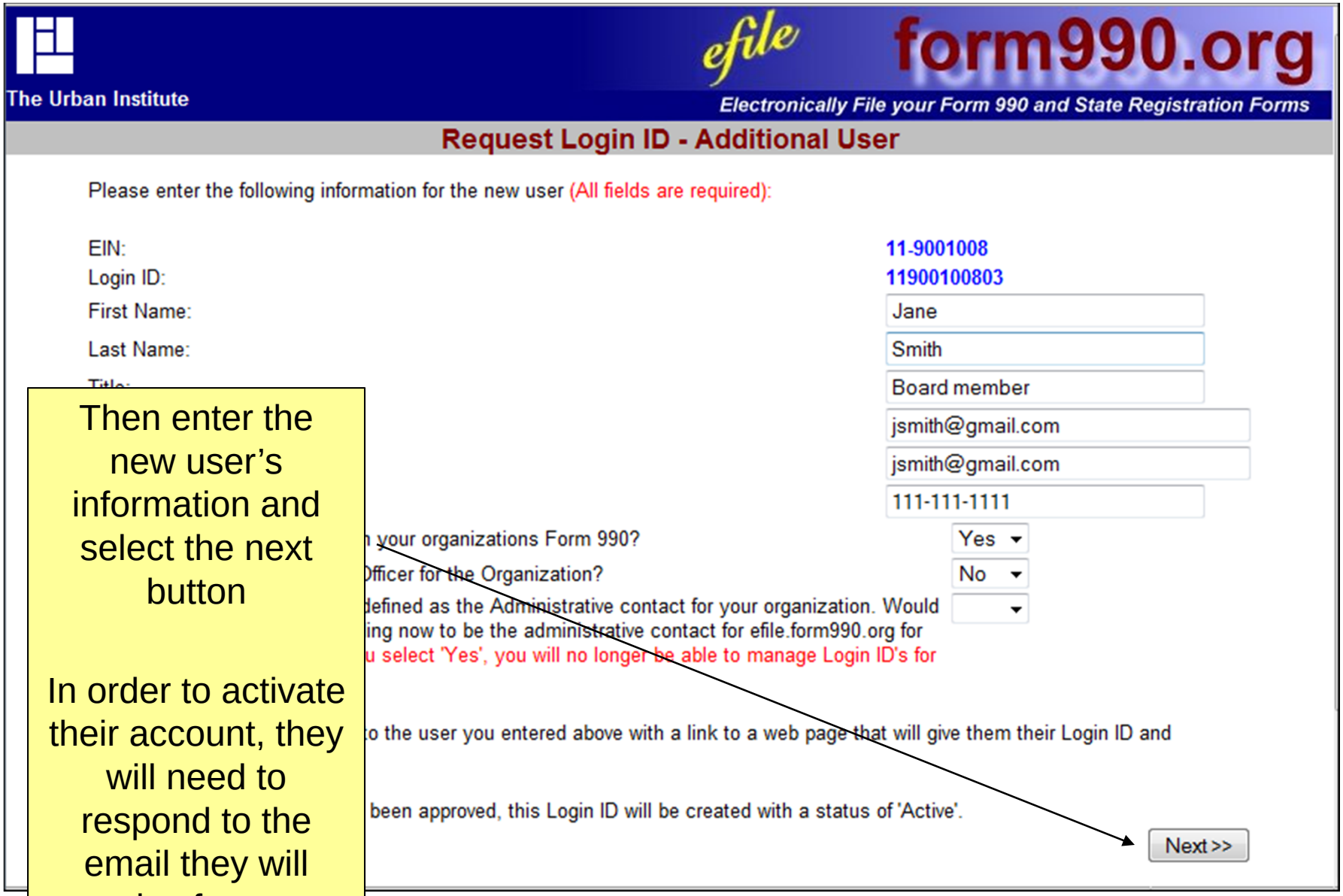
After you have obtained your Login ID, add other users to your account.

From the homepage at the Quick Menu you can select “Update User Record.”



The PRIMARY USER of an account can add other users. The primary user of the account is generally the person who registers the first account in our system.


The Urban Institute
efile form990.org
Electronically File your Form 990 and State Registration Forms
Home
Fundraisers
Support
Links
Log Out
Manage Users
The following is the current information contained in your User Record. Click the Edit button if you would like to change this information.
Click the Change Password button to change your password.
Login ID: 11900100801
Name: Tom Smith
Organization: Urban Institute
Position: Board member
ID Status: Active
User Type/Level: NonProfit/Standard (IRS) Login ID
Can Sign: Yes
Primary Contact: Yes
CFO: No
Edit Login ID
Change Password
User List for Urban Institute
Login ID | Name | Status | Email
11900100801 | Tom Smith | Active | tsmith@gmail.com
11900100802 | Tim Smith | Active | tsmith@gmail.com
Add User
To edit a user record, click on the appropriate Login ID in the list above
Then from the Manage Users page, Select the Add User Button



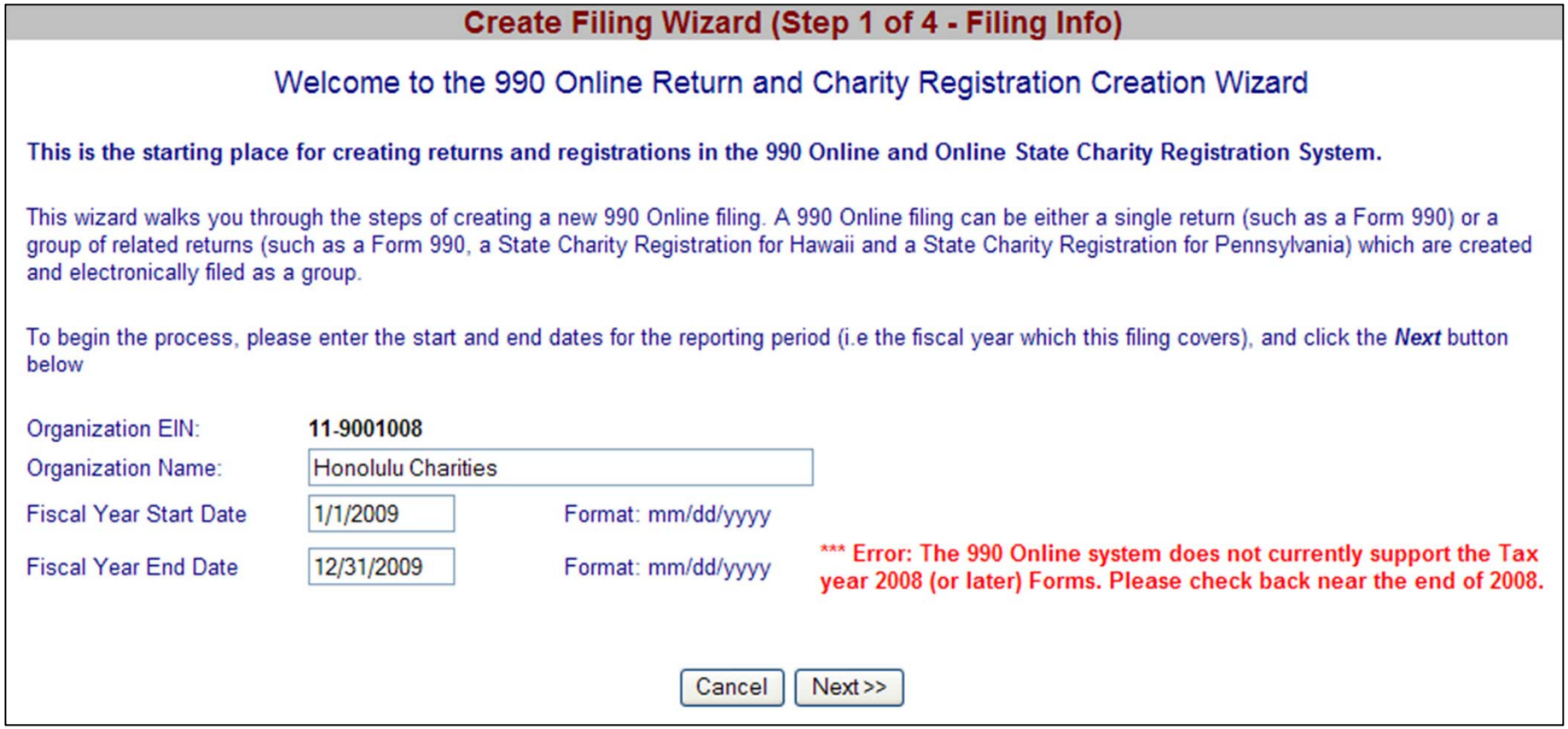
Then enter the new user's information and select the next button

In order to activate their account, they will need to respond to the email they will receive from our system.

Step 2: Use the “Create Filing” Wizard to create your Registration Form

Create Filing Wizard – Page 1

Make a mistake? We can usually catch it.



Create Filing Wizard (Step 1 of 4 - Filing Info)

Welcome to the 990 Online Return and Charity Registration Creation Wizard

This is the starting place for creating returns and registrations in the 990 Online and Online State Charity Registration System.

This wizard walks you through the steps of creating a new 990 Online filing. A 990 Online filing can be either a single return (such as a Form 990) or a group of related returns (such as a Form 990, a State Charity Registration for Hawaii and a State Charity Registration for Pennsylvania) which are created and electronically filed as a group.

To begin the process, please enter the start and end dates for the reporting period (i.e the fiscal year which this filing covers), and click the ***Next*** button below

Organization EIN: **11-9001008**

Organization Name: Honolulu Charities

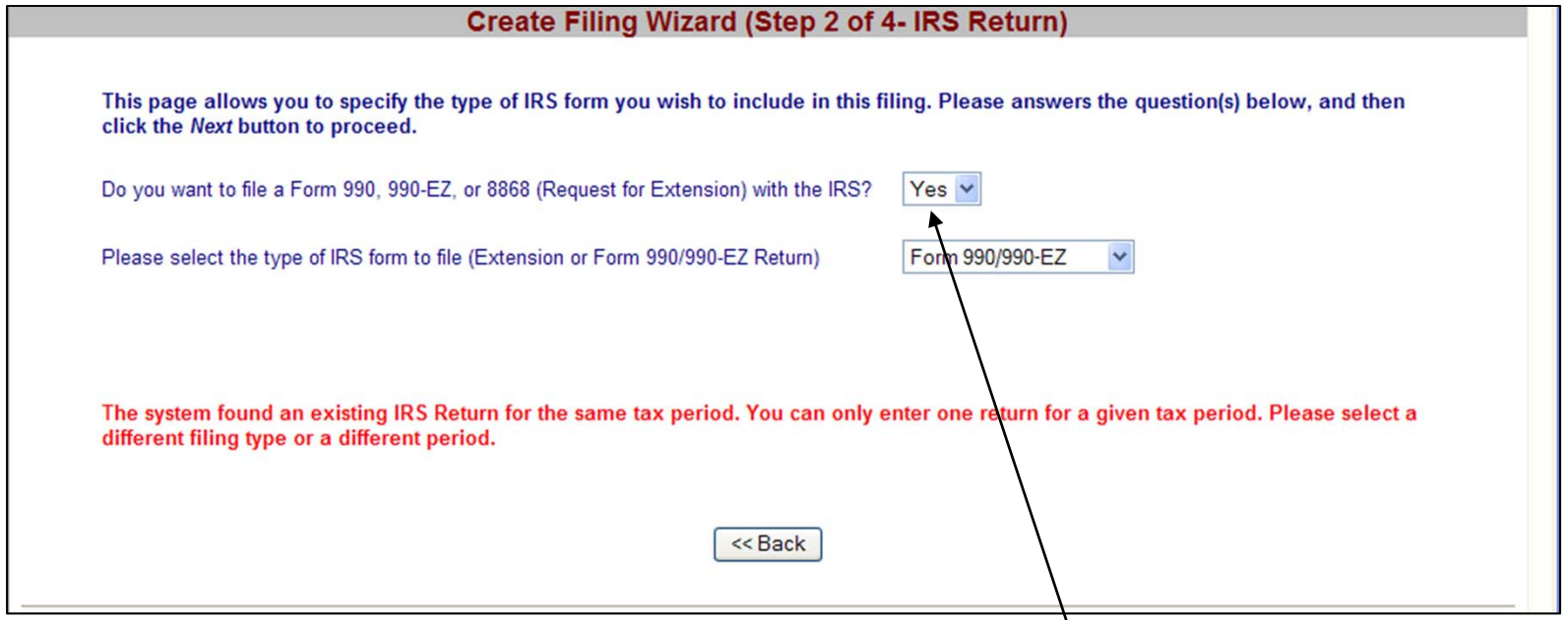
Fiscal Year Start Date: 1/1/2009 Format: mm/dd/yyyy

Fiscal Year End Date: 12/31/2009 Format: mm/dd/yyyy

***** Error: The 990 Online system does not currently support the Tax year 2008 (or later) Forms. Please check back near the end of 2008.**

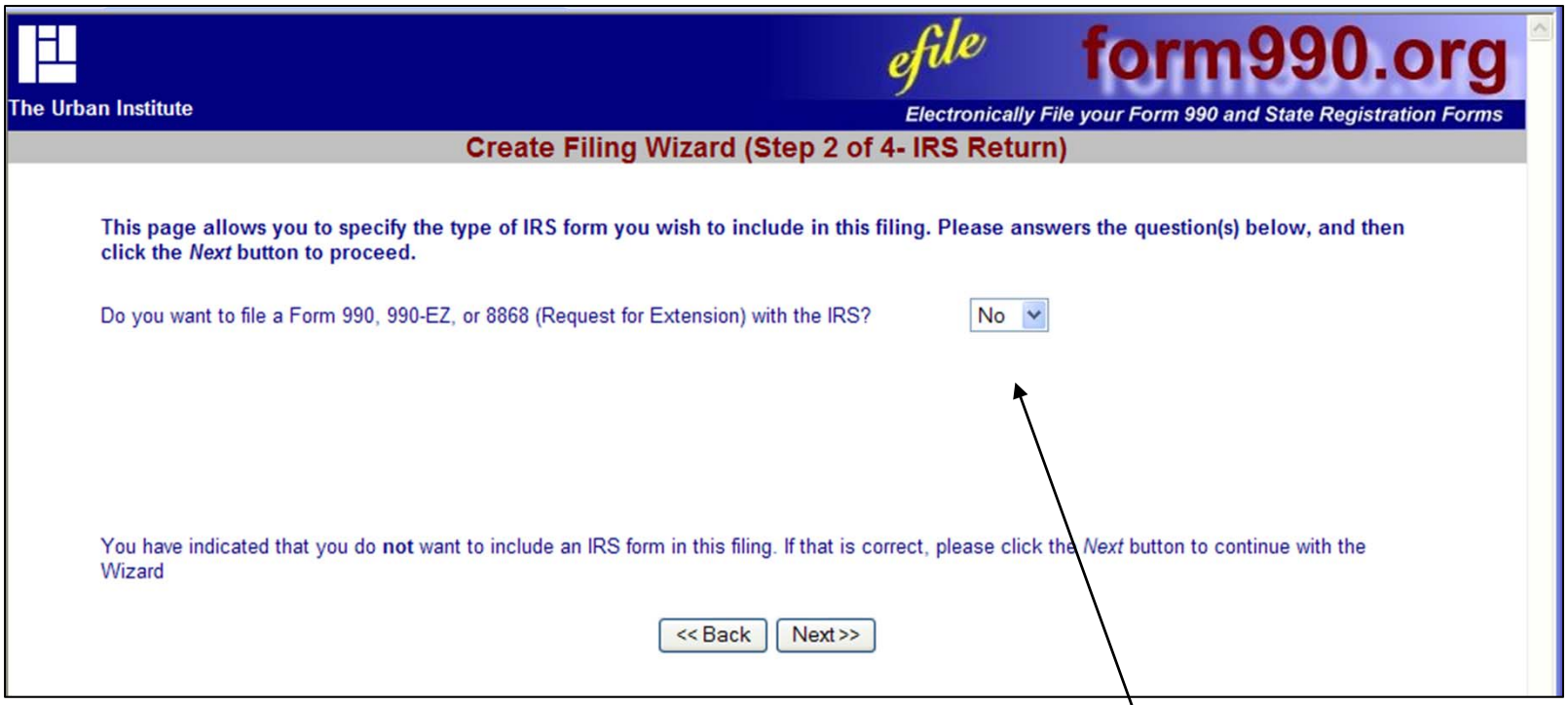
Cancel Next >>

Create Filing Wizard – Page 2



If you are only creating your Hawaii Registration Form, choose **No**.

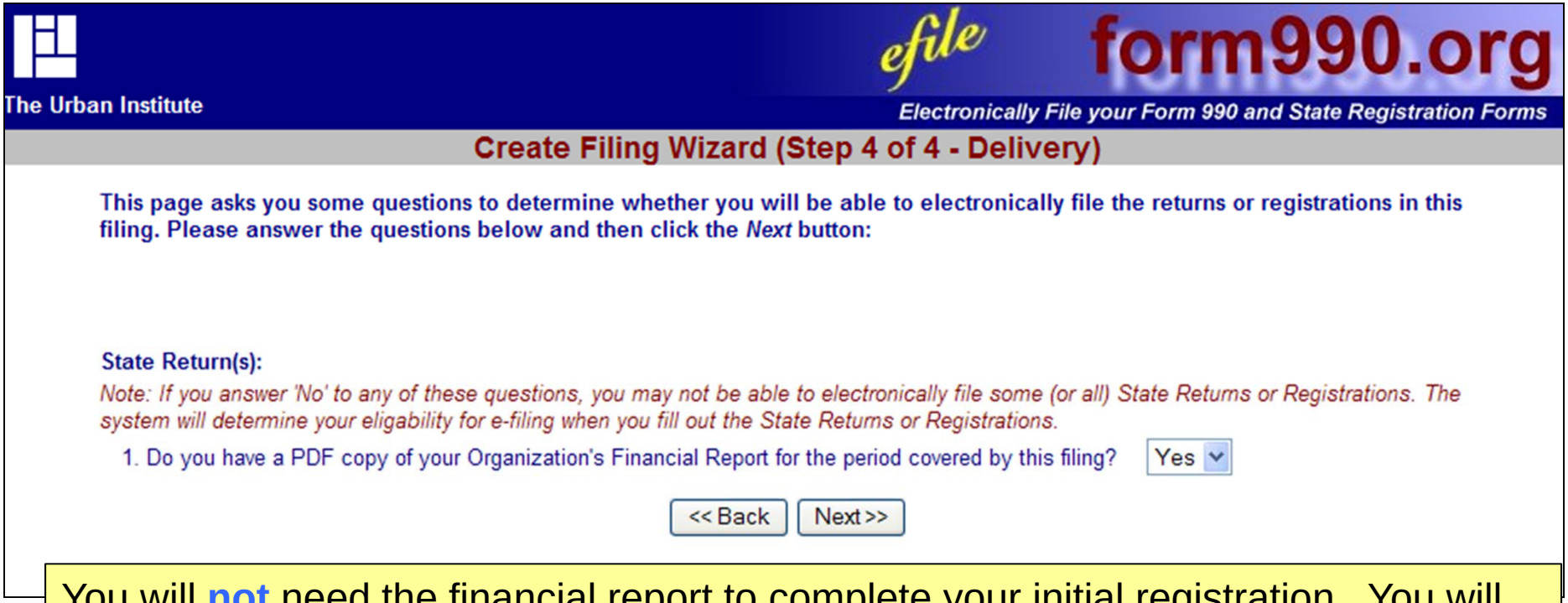
Create Filing Wizard – Page 2



If you answered **No, your screen should look like this.**

Create Filing Wizard – Page 3: Specify the states where you file

Create Filing Wizard – Page 4: Make sure you have the documents you need to get started



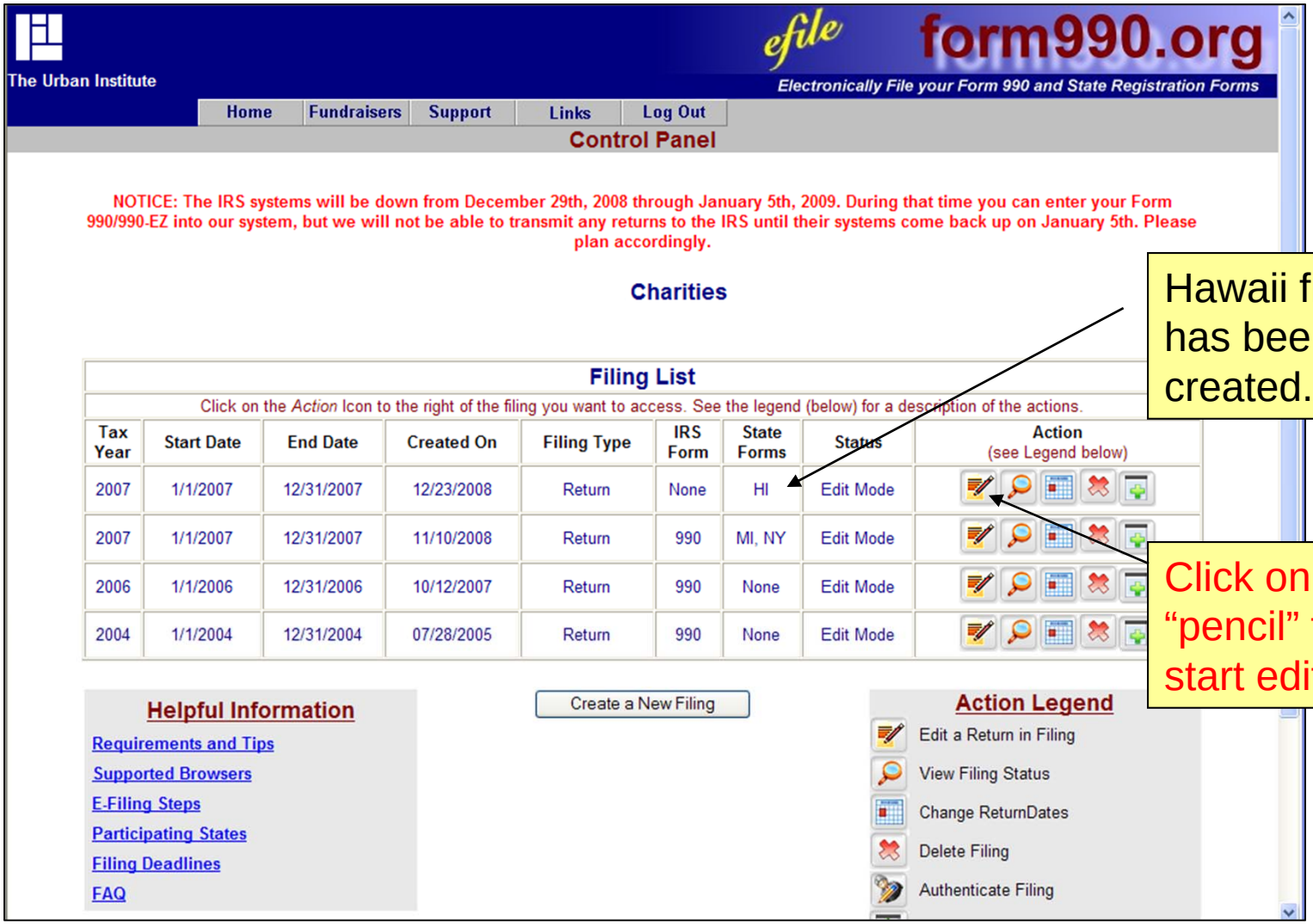
You will **not** need the financial report to complete your initial registration. You will need it in several months when you file your Hawaii Annual Financial Report.

Note that e-Filing in Hawaii is mandatory. If you need to convert a paper document to a PDF, there are numerous free services available on the web. See the FAQs for details.

Congratulations, you are finished with the Create Filing Wizard and are ready to begin completing your Hawaii Registration form.

By clicking on the Finish button, you will be directed to the Control Panel where you may begin completing your registration by clicking on the Pencil Icon.

The Control Panel



Hawaii filing has been created.

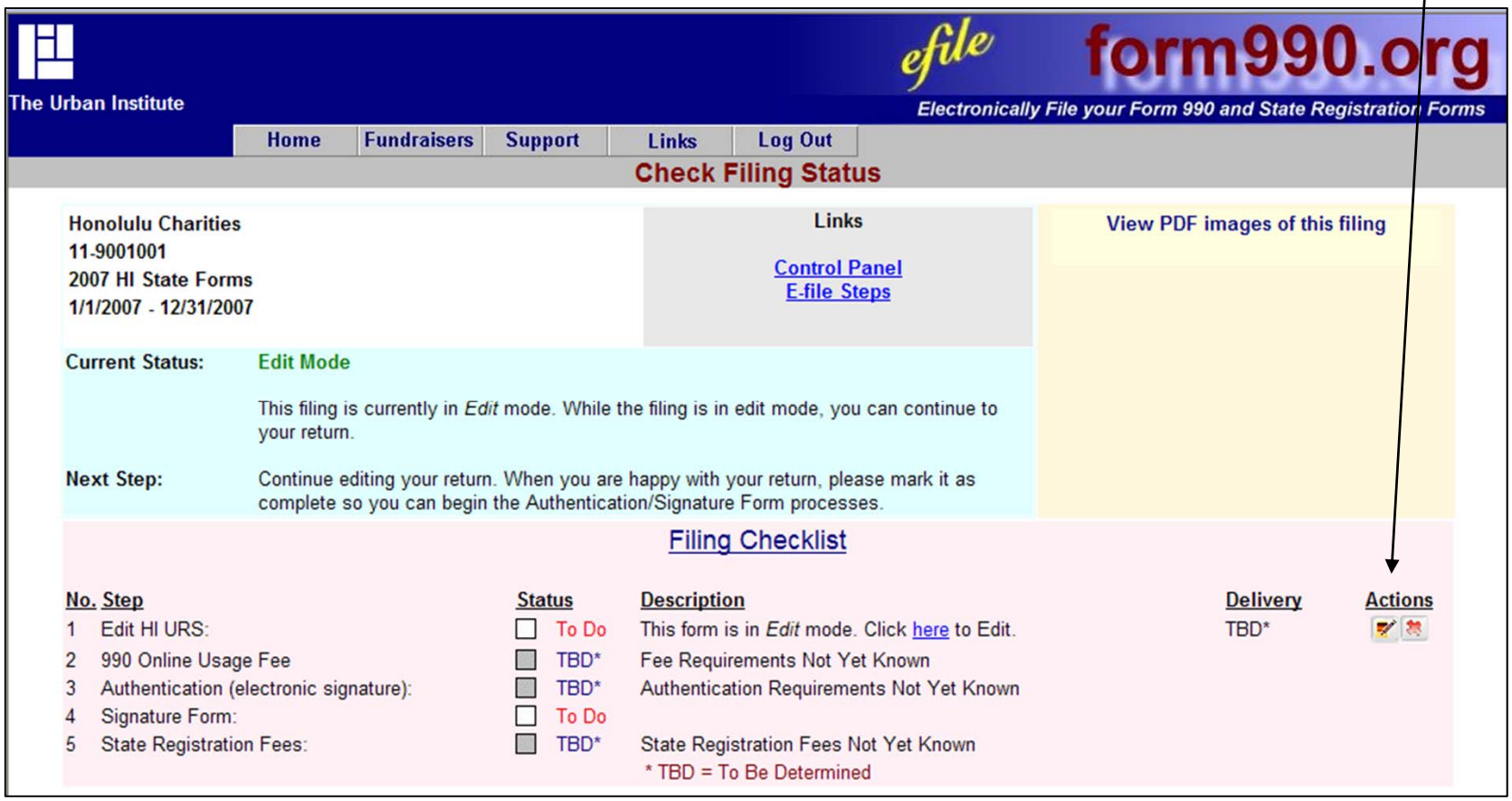
Click on the “pencil” to start editing.

The Control Panel

You can get back to the Control Panel anytime from the homepage at the Quick Menu by selecting the Control Panel link

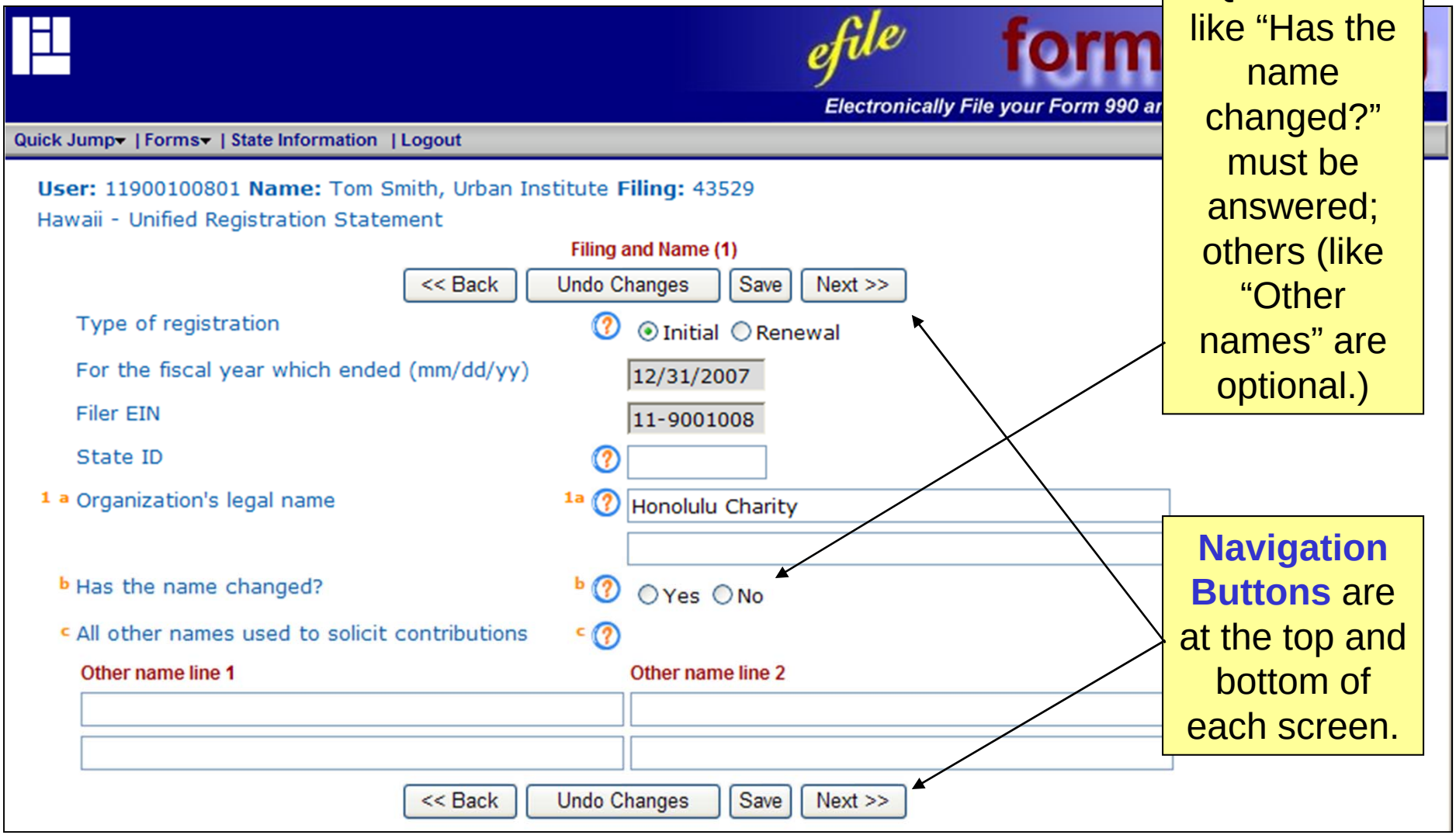
Filing Status Page

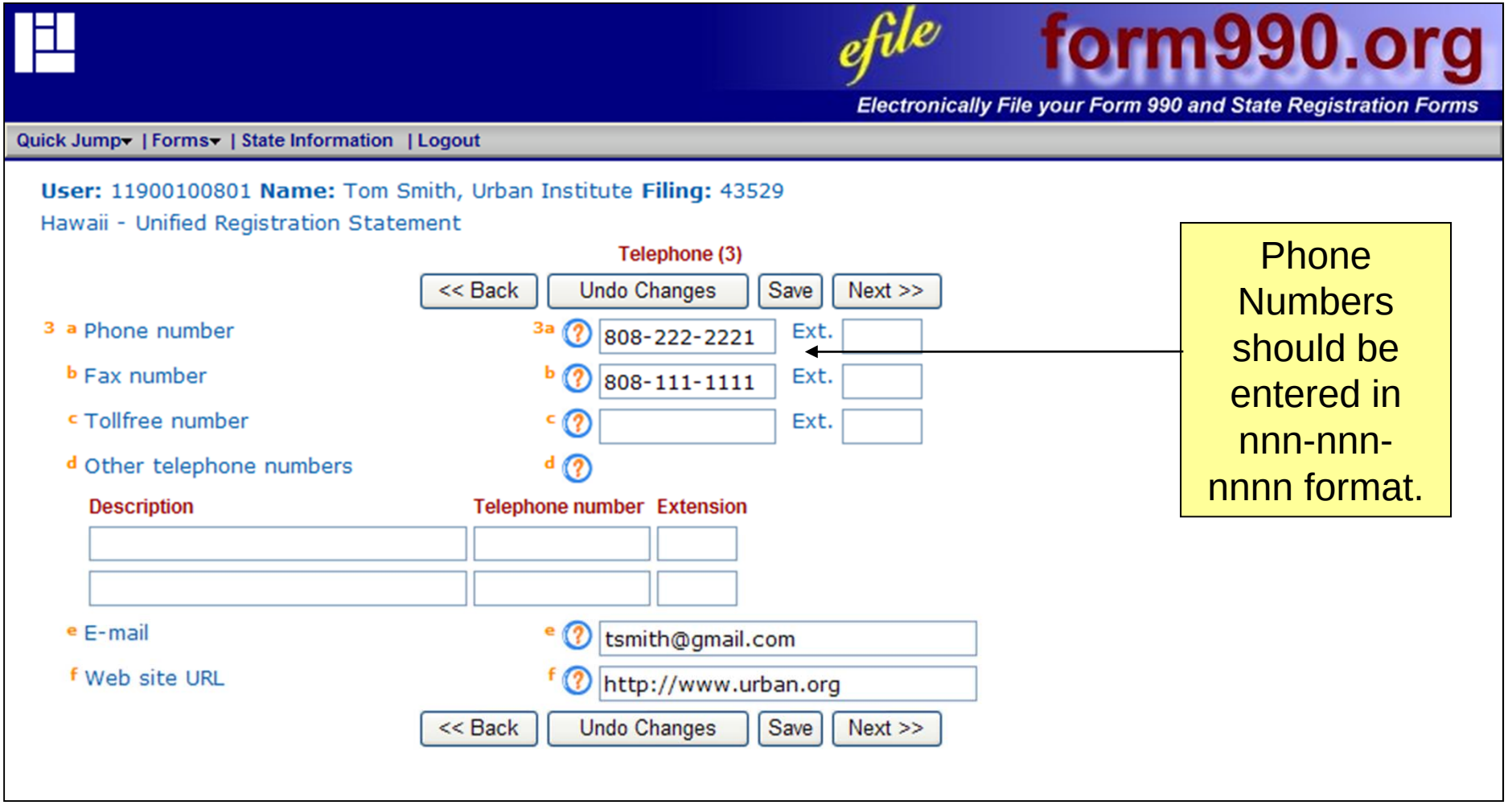
Click on the "pencil" again to begin

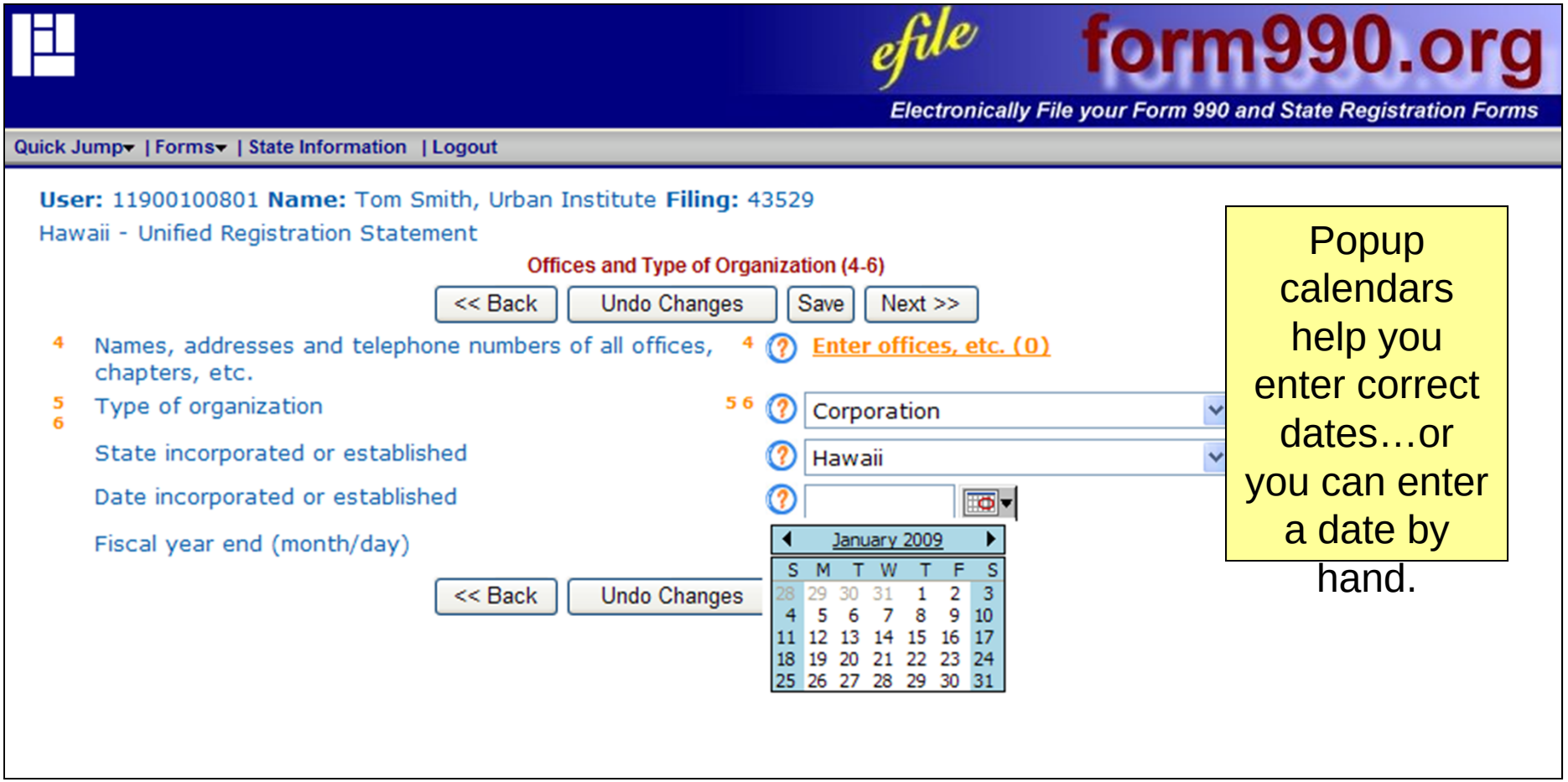


The Filing Status page lets you know if your return has been completed, transmitted to Hawaii, and accepted.

The Hawaii Registration Form is the same form Uniform Registration Form (URS) accepted in more than 35 states.


efile form
Electronically File your Form 990 ar
Quick Jump | Forms | State Information | Logout
User: 11900100801 Name: Tom Smith, Urban Institute Filing: 43529
Hawaii - Unified Registration Statement
Filing and Name (1)
<< Back
Undo Changes
Save
Next >>
Type of registration
Initial
Renewal
For the fiscal year which ended (mm/dd/yy)
12/31/2007
Filer EIN
11-9001008
State ID
1 a Organization's legal name
1a
Honolulu Charity
b Has the name changed?
b
Yes
No
c All other names used to solicit contributions
c
Other name line 1
Other name line 2
<< Back
Undo Changes
Save
Next >>
Questions like “Has the name changed?” must be answered; others (like “Other names” are optional.)
Navigation Buttons are at the top and bottom of each screen.

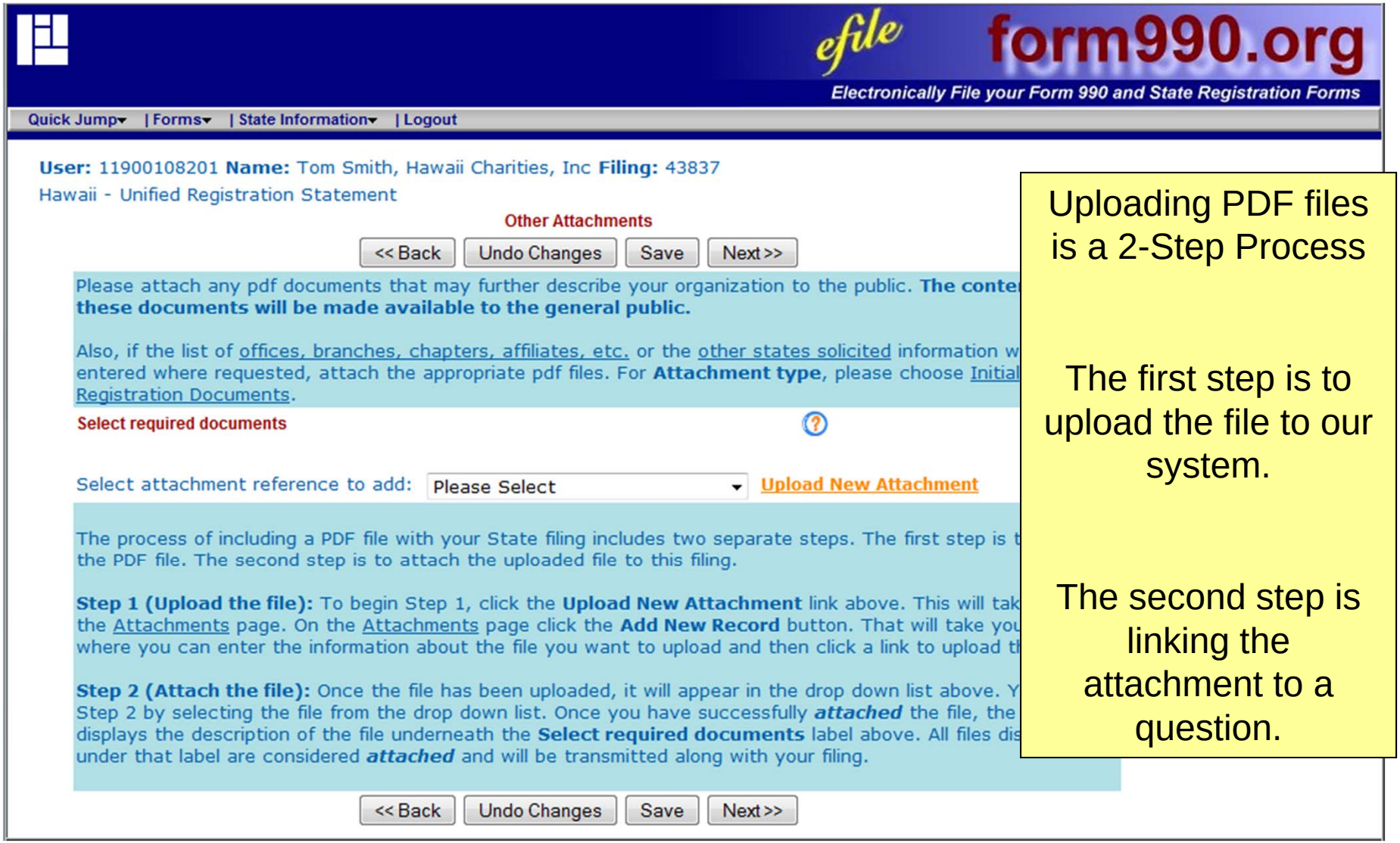

efile form990.org
Electronically File your Form 990 and State Registration Forms
Quick Jump | Forms | State Information | Logout
User: 11900100801 Name: Tom Smith, Urban Institute Filing: 43529
Hawaii - Unified Registration Statement
Telephone (3)
<< Back
Undo Changes
Save
Next >>
3 a Phone number
3a
808-222-2221
Ext.
b Fax number
b
808-111-1111
Ext.
c Tollfree number
c
Ext.
d Other telephone numbers
d
Description
Telephone number
Extension
e E-mail
e
tsmith@gmail.com
f Web site URL
f
http://www.urban.org
<< Back
Undo Changes
Save
Next >>
Phone Numbers should be entered in nnn-nnn-nnnn format.



Popup calendars help you enter correct dates…or you can enter a date by hand.

You can upload PDF files to our system for sections with lengthy lists. This option is available for Line 4 and Lines 7f & 7g.

To upload a PDF file, select “Other Attachments” from the Quick Jump menu

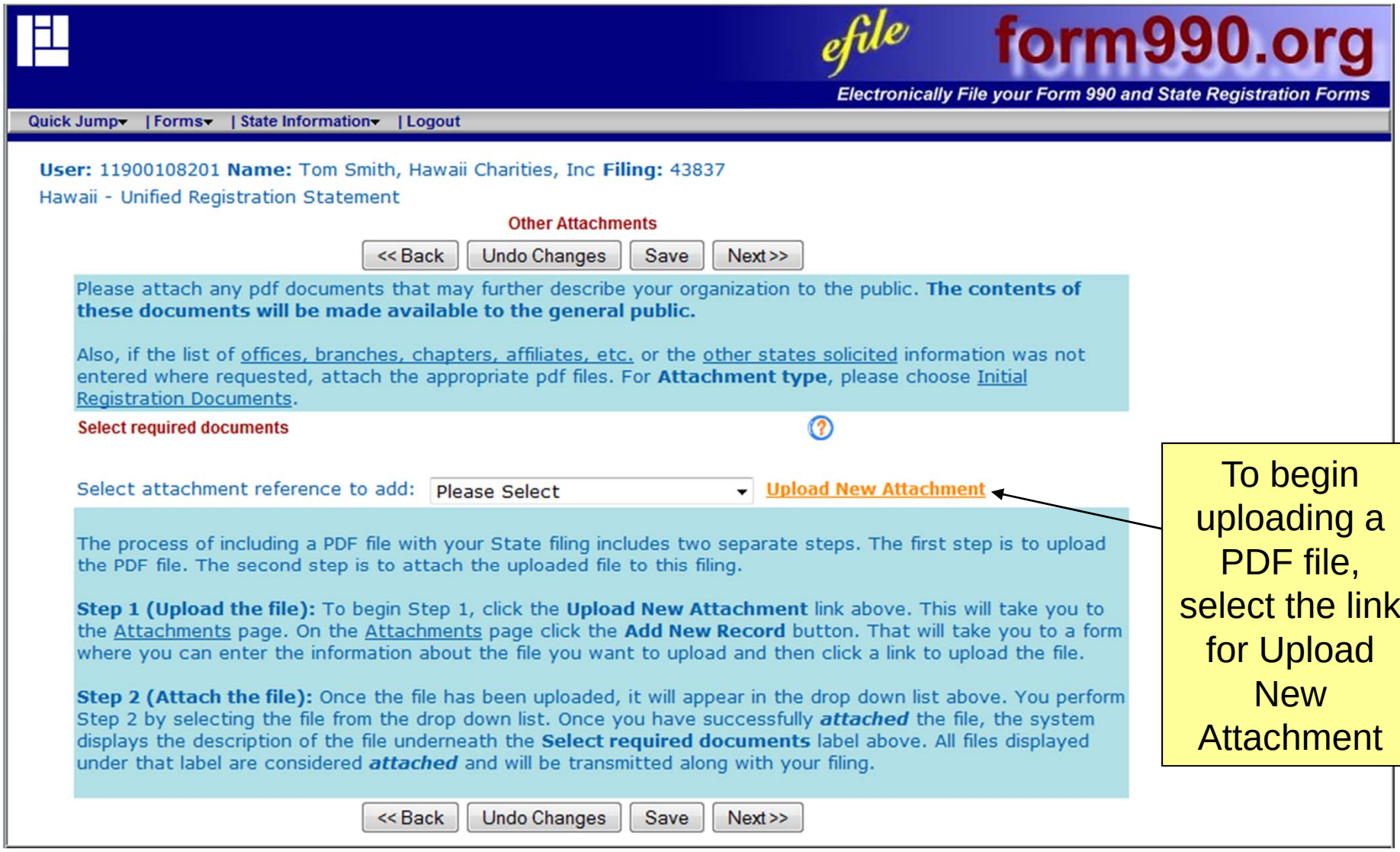


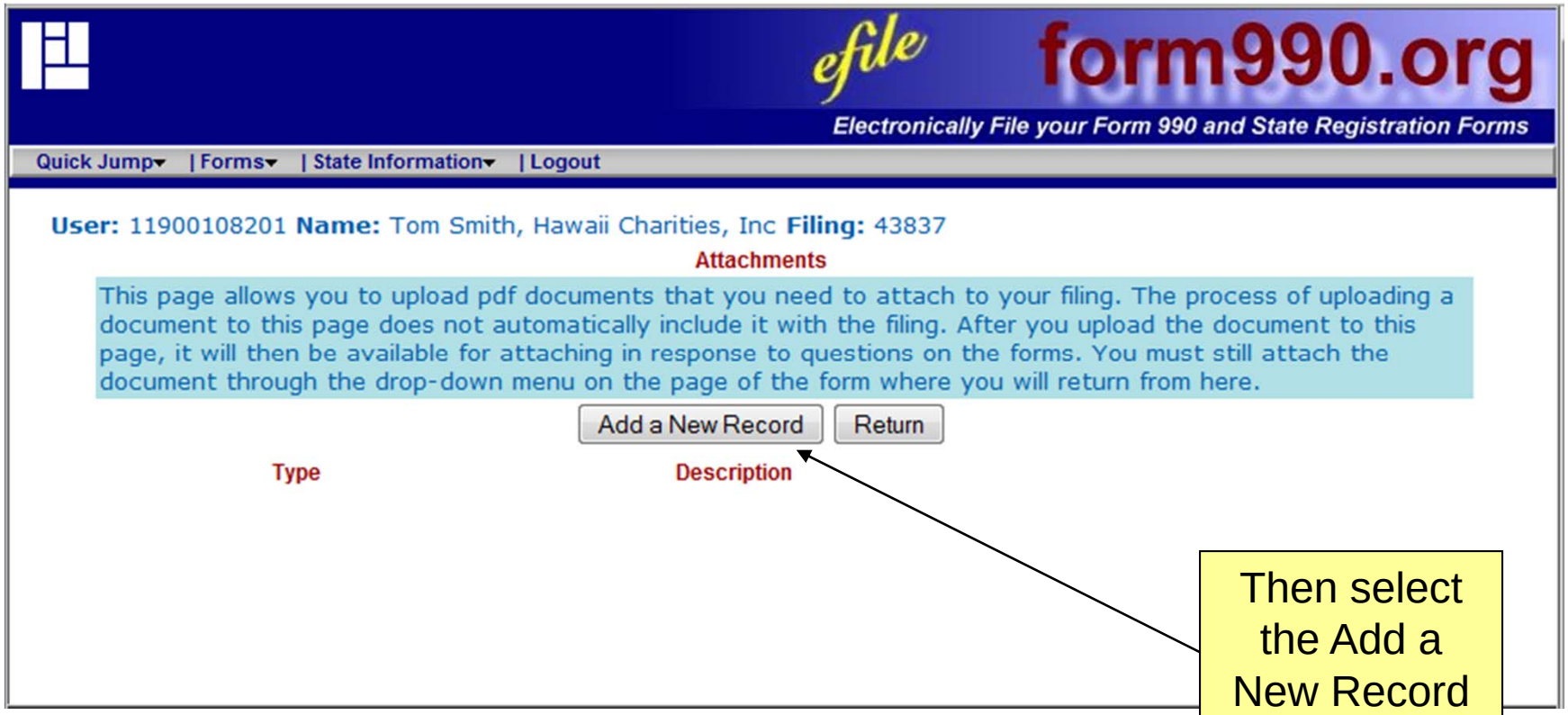
Uploading PDF files is a 2-Step Process

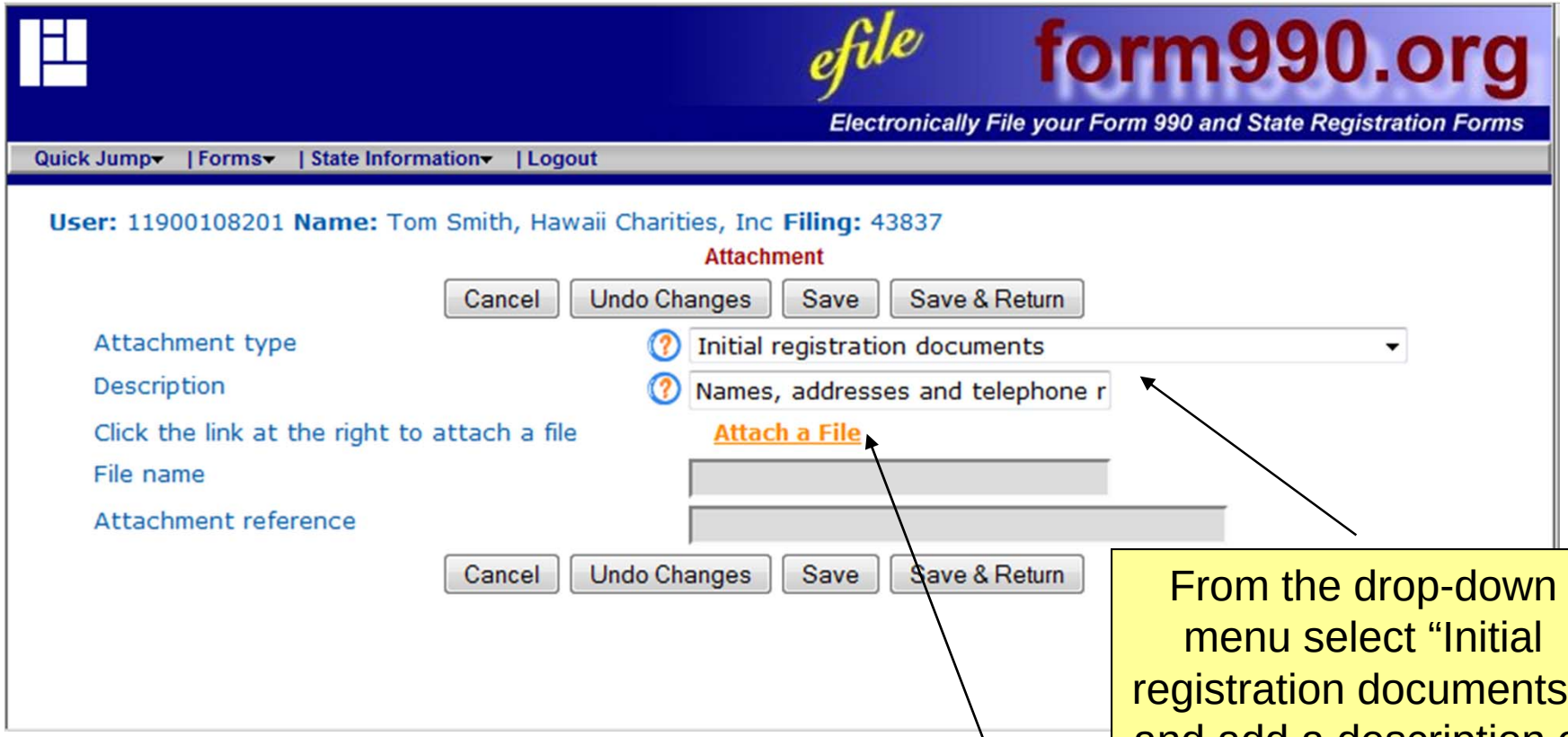
The first step is to upload the file to our system.

The second step is linking the attachment to a question.

This is a 2-Step Process because an attachment can be used in multiple forms for multiple states.

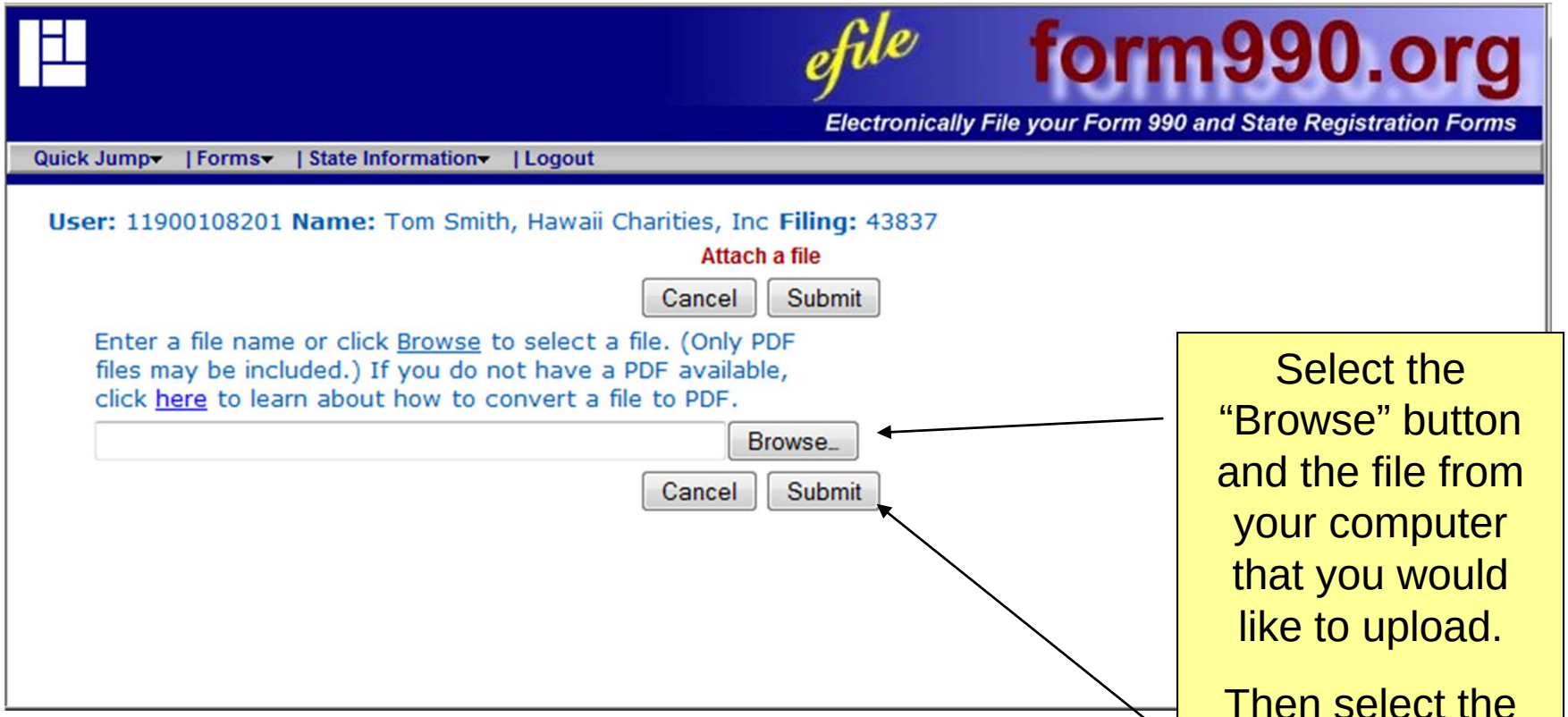

efile form990.org
Electronically File your Form 990 and State Registration Forms
Quick Jump | Forms | State Information | Logout
User: 11900108201 Name: Tom Smith, Hawaii Charities, Inc Filing: 43837
Hawaii - Unified Registration Statement
Other Attachments
<< Back
Undo Changes
Save
Next >>
Please attach any pdf documents that may further describe your organization to the public. The contents of these documents will be made available to the general public.
Also, if the list of offices, branches, chapters, affiliates, etc. or the other states solicited information was not entered where requested, attach the appropriate pdf files. For Attachment type, please choose Initial Registration Documents.
Select required documents
Select attachment reference to add:
Please Select
Upload New Attachment
The process of including a PDF file with your State filing includes two separate steps. The first step is to upload the PDF file. The second step is to attach the uploaded file to this filing.
Step 1 (Upload the file): To begin Step 1, click the Upload New Attachment link above. This will take you to the Attachments page. On the Attachments page click the Add New Record button. That will take you to a form where you can enter the information about the file you want to upload and then click a link to upload the file.
Step 2 (Attach the file): Once the file has been uploaded, it will appear in the drop down list above. You perform Step 2 by selecting the file from the drop down list. Once you have successfully attached the file, the system displays the description of the file underneath the Select required documents label above. All files displayed under that label are considered attached and will be transmitted along with your filing.
<< Back
Undo Changes
Save
Next >>
To begin uploading a PDF file, select the link for Upload New Attachment


efile
form990.org
Electronically File your Form 990 and State Registration Forms
Quick Jump | Forms | State Information | Logout
User: 11900108201 Name: Tom Smith, Hawaii Charities, Inc Filing: 43837
Attachments
This page allows you to upload pdf documents that you need to attach to your filing. The process of uploading a document to this page does not automatically include it with the filing. After you upload the document to this page, it will then be available for attaching in response to questions on the forms. You must still attach the document through the drop-down menu on the page of the form where you will return from here.
Add a New Record
Return
Type
Description
Then select the Add a New Record Button



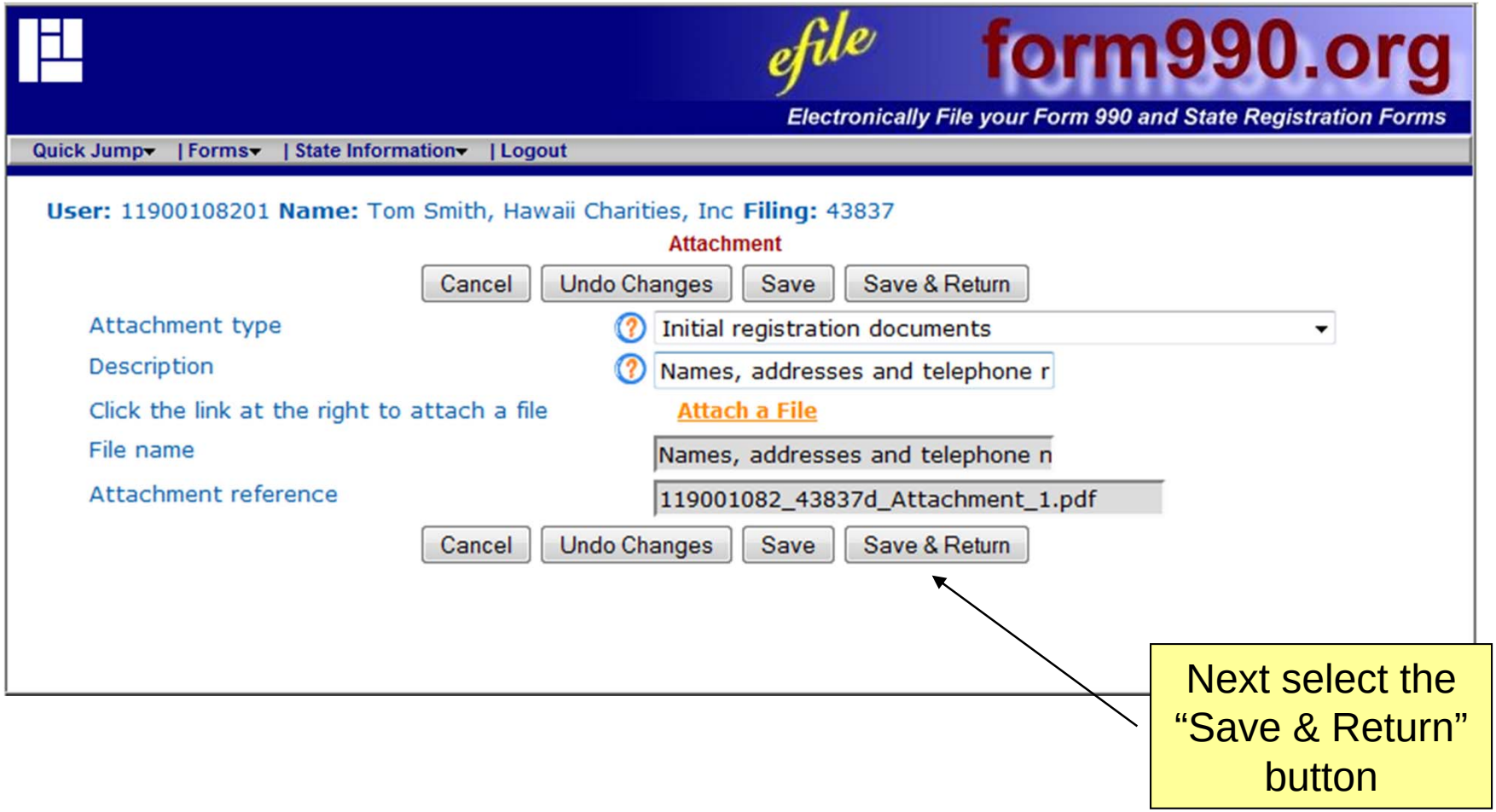
From the drop-down menu select “Initial registration documents,” and add a description of the type of file that you are uploading

Then select the link for “Attach a File”

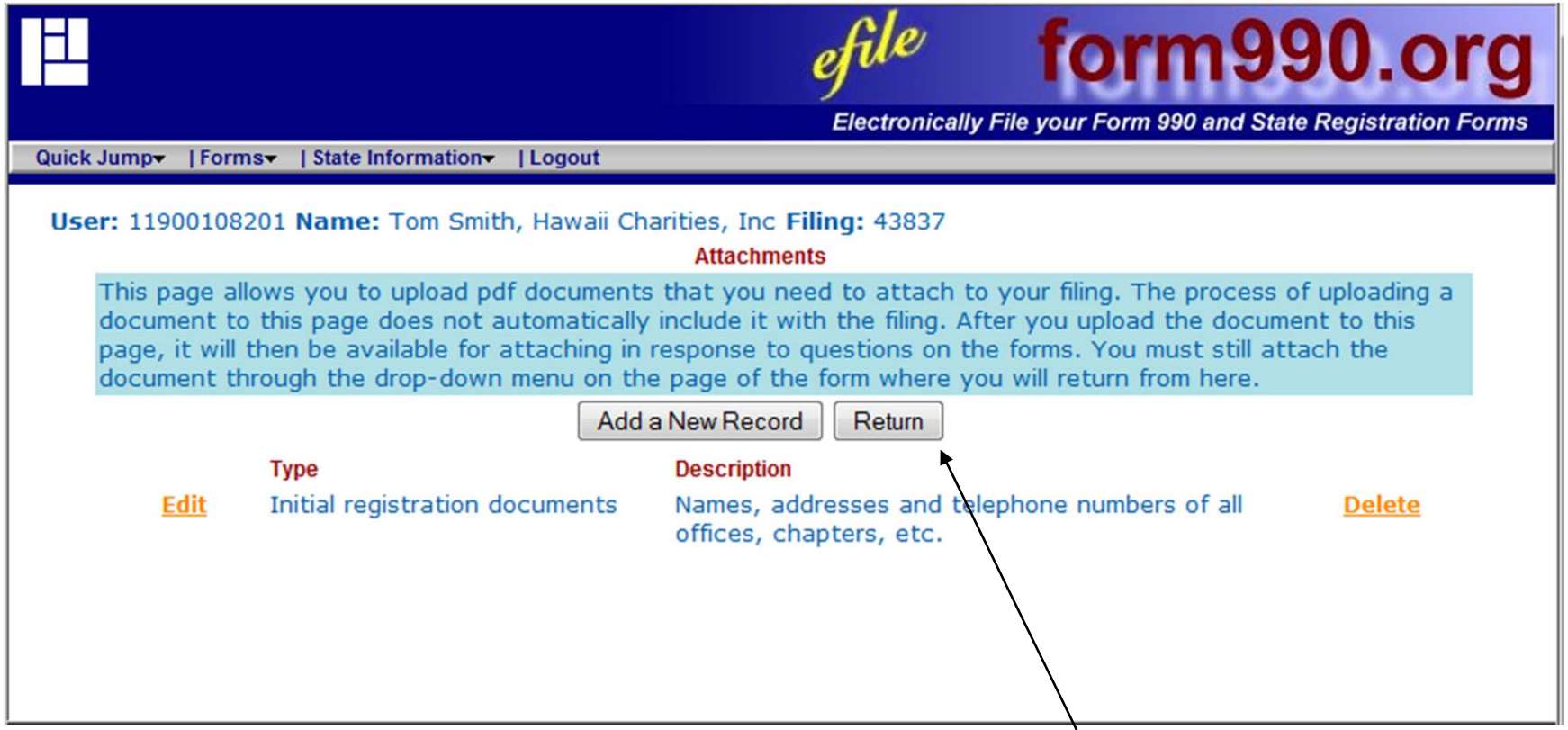


Select the "Browse" button and the file from your computer that you would like to upload.

Then select the "Submit" button



Next select the "Save & Return" button



Then Select the "Return" button

efile form990.org
Electronically File your Form 990 and State Registration Forms
Quick Jump | Forms | State Information | Logout
User: 11900108201 Name: Tom Smith, Hawaii Charities, Inc Filing: 43837
Hawaii - Unified Registration Statement
Other Attachments
<< Back
Undo Changes
Save
Next >>
Please attach any pdf documents that may further describe your organization to the public. The contents of these documents will be made available to the general public.
Also, if the list of offices, branches, chapters, affiliates, etc. or the other states solicited information was not entered where requested, attach the appropriate pdf files. For Attachment type, please choose Initial Registration Documents.
Select required documents
Names, addresses and telephone numbers of all offices, chapters, etc. Delete
Select attachment reference to add: Please Select
Upload New Attach
The process of including a PDF file with your State filing includes two separate steps. The firs
the PDF file. The second step is to attach the uploaded file to this filing.
Step 1 (Upload the file): To begin Step 1, click the Upload New Attachment link above. T
the Attachments page. On the Attachments page click the Add New Record button. That wi
where you can enter the information about the file you want to upload and then click a link t
Step 2 (Attach the file): Once the file has been uploaded, it will appear in the drop down lis
Step 2 by selecting the file from the drop down list. Once you have successfully attached th
displays the description of the file underneath the Select required documents label above.
under that label are considered attached and will be transmitted along with your filing.
<< Back
Undo Changes
Save
Next >>
From the drop-down menu select the file that you would like to attach
Your PDF file will now be attached to your Hawaii registration

efile form990.org

Electronically File your Form 990 and State Registration Forms

Quick Jump | Forms | State Information | Logout

Hawaii - Unified Registration Statement

User: 11900100801 **Name:** Tom Smith, Urban Institute **Filing:** 43529

Hawaii - Unified Registration Statement

Exemption Information (8-11)

<< Back | Undo Changes | Save | Next >>

8	Has the organization been granted IRS tax exempt status?	8	Yes No
9	Has tax exempt status every been denied, revoked or modified?	9	Yes No
10	Manner in which contributions are solicited	10	Enter methods of solicitation (0)
11	List the NTEE code(s) that best describes your organization	11	Enter NTEE codes (2)

<< Back | Undo Changes | Save | Next >>

Method of solicitation

- Direct Mail Campaigns
- Telephone Solicitation
- Personal Contact
- Radio and TV
- Special Events
- Newspaper and Magazine Advertisement

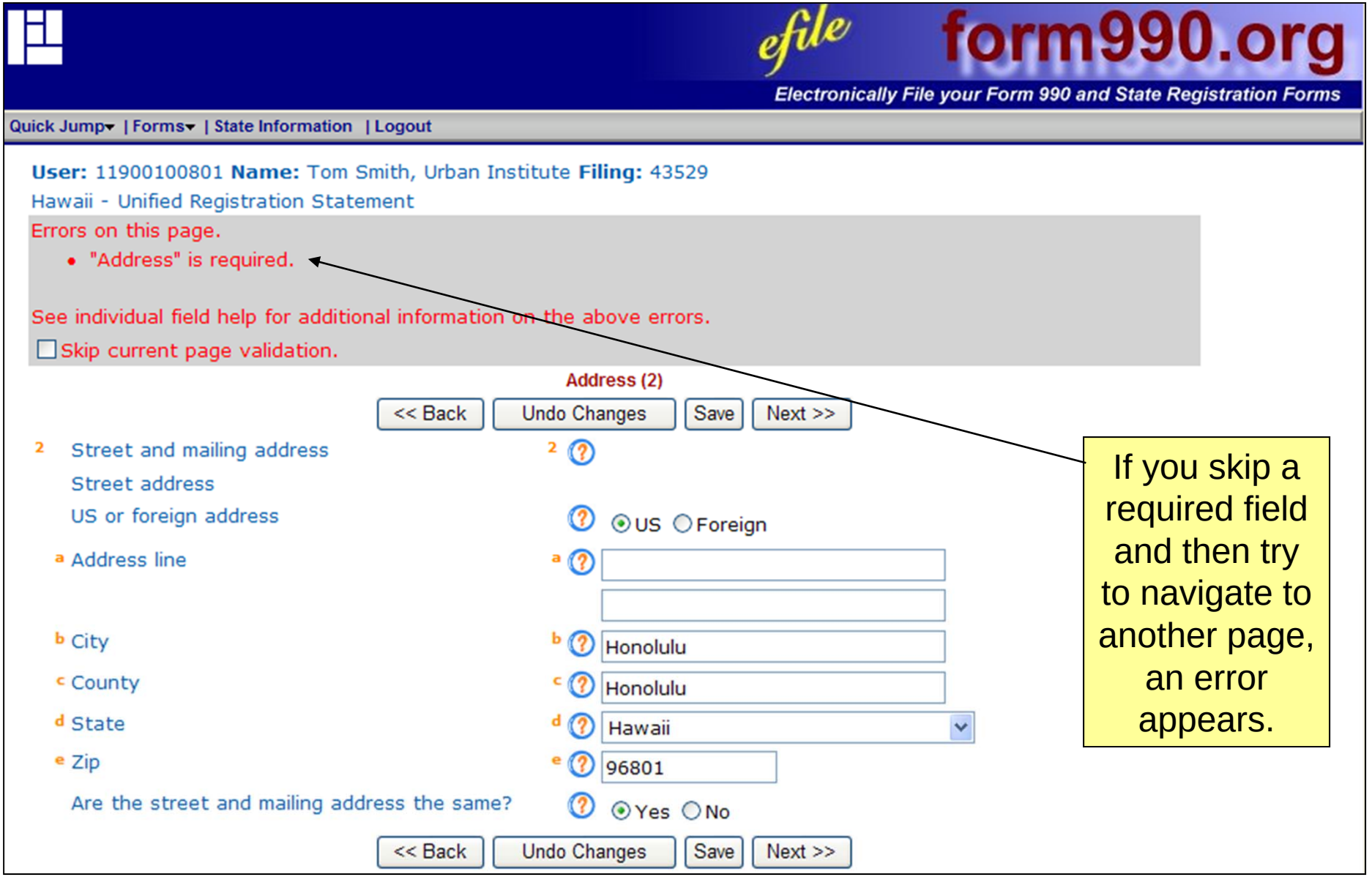
Other methods of solicitation

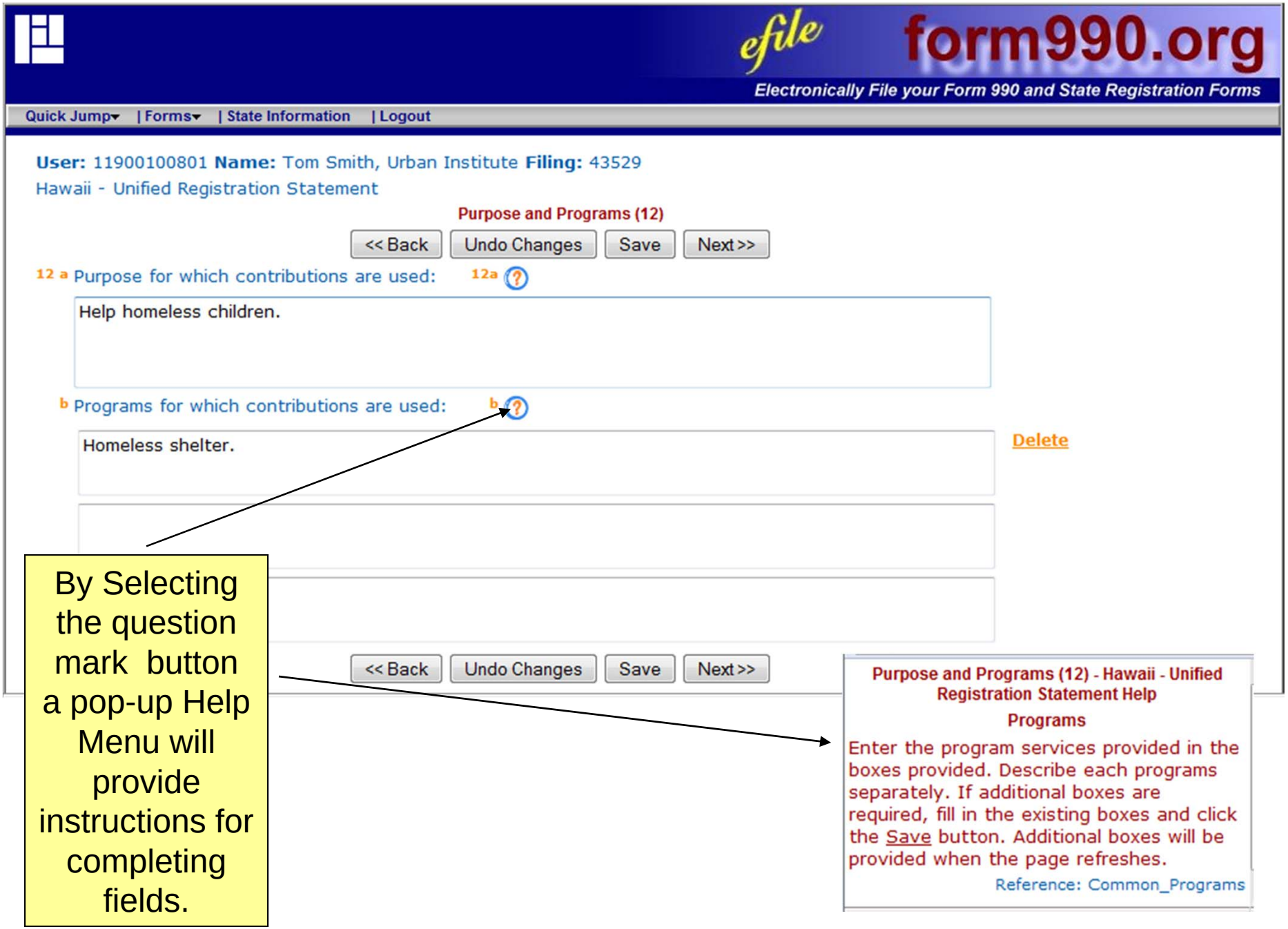
Other method of solicitation

Some fields may let you select more than one option.

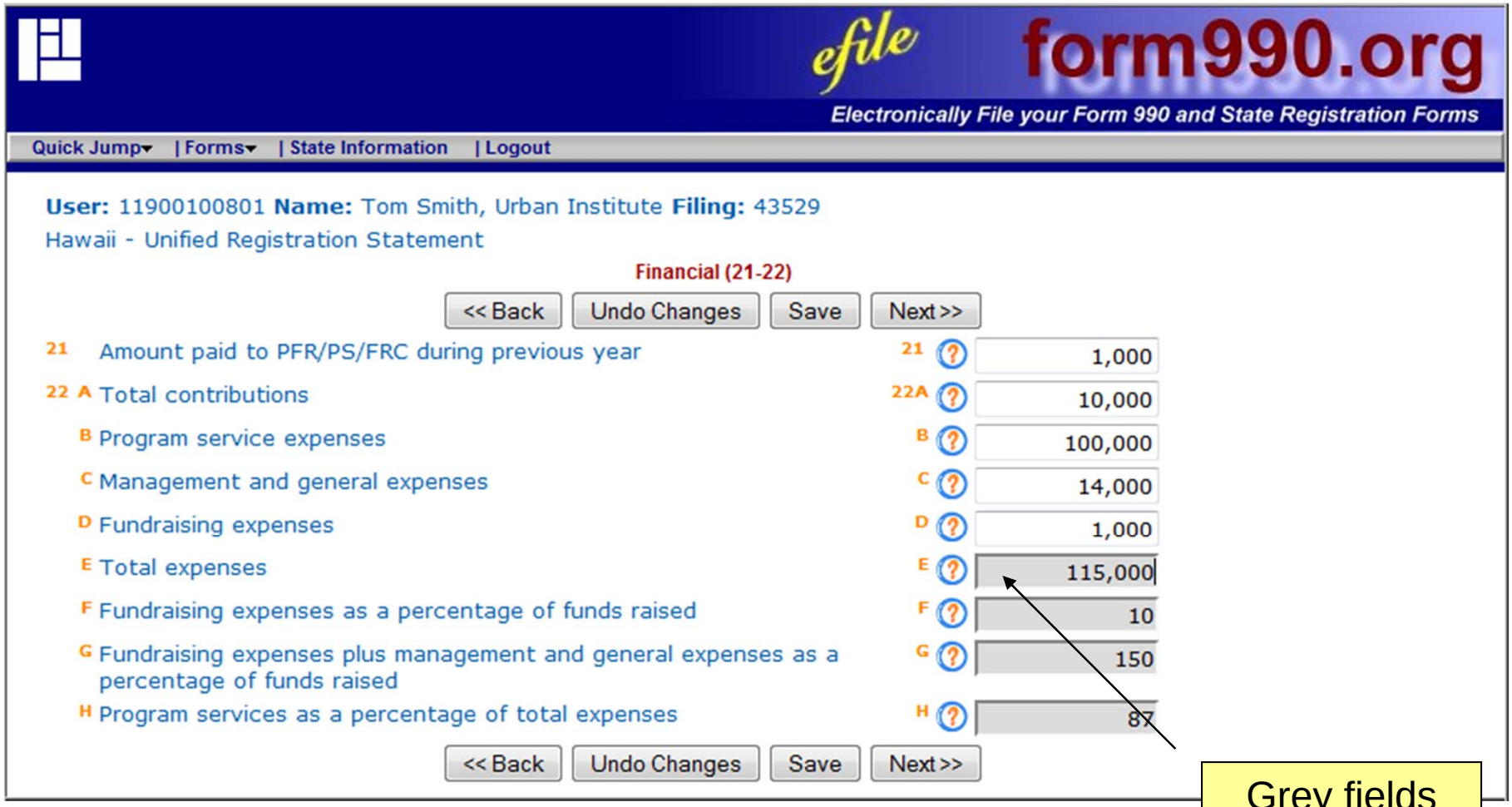
For example, click on "Enter methods…" to select all your fundraising methods.

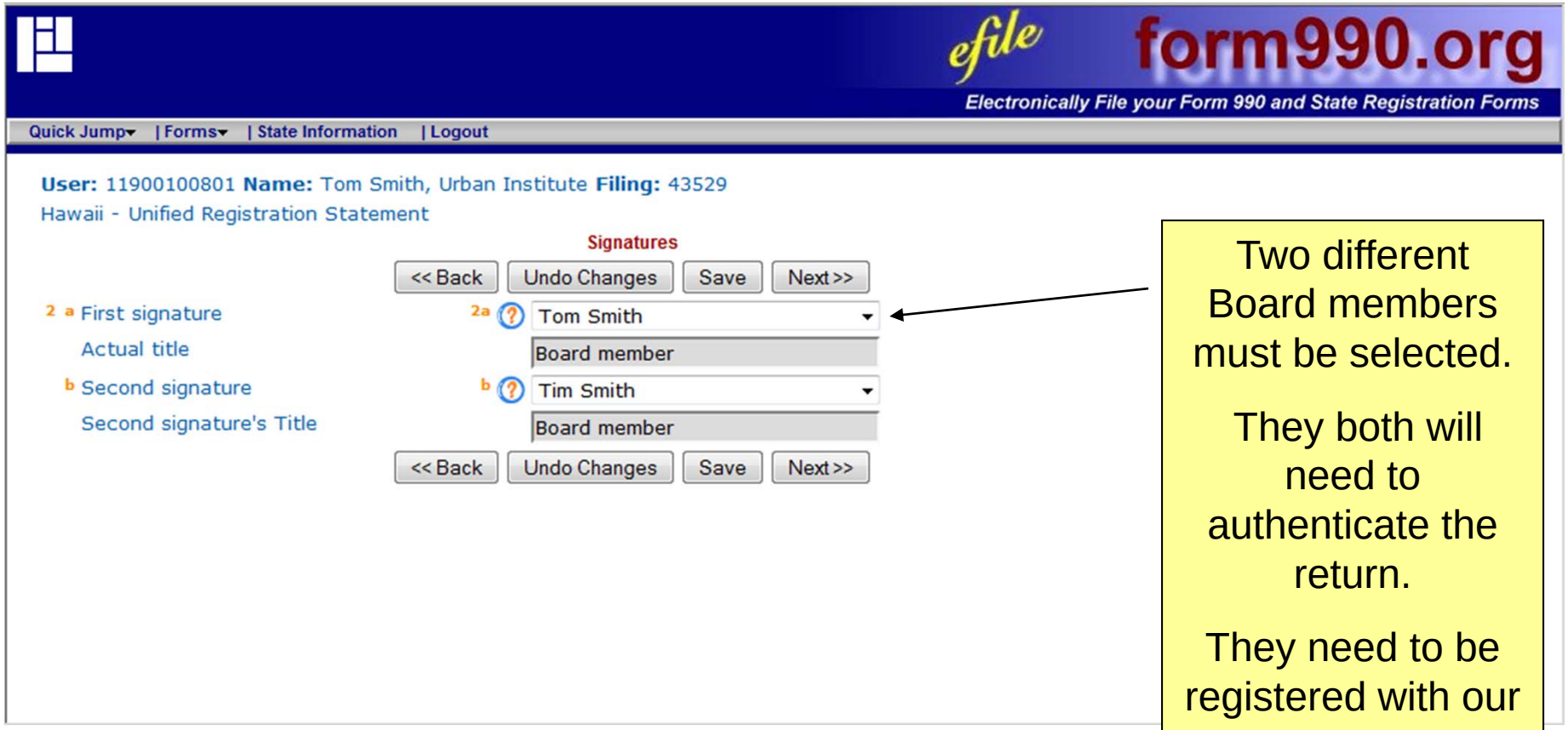
The next screen shows your options.


efile form990.org
Electronically File your Form 990 and State Registration Forms
Quick Jump | Forms | State Information | Logout
User: 11900100801 Name: Tom Smith, Urban Institute Filing: 43529
Hawaii - Unified Registration Statement
Errors on this page.
"Address" is required.
See individual field help for additional information on the above errors.
Skip current page validation.
Address (2)
<< Back
Undo Changes
Save
Next >>
2 Street and mailing address
Street address
US or foreign address
US
Foreign
a Address line
b City
Honolulu
c County
Honolulu
d State
Hawaii
e Zip
96801
Are the street and mailing address the same?
Yes
No
<< Back
Undo Changes
Save
Next >>
If you skip a required field and then try to navigate to another page, an error appears.


efile form990.org
Electronically File your Form 990 and State Registration Forms
Quick Jump | Forms | State Information | Logout
User: 11900100801 Name: Tom Smith, Urban Institute Filing: 43529
Hawaii - Unified Registration Statement
Purpose and Programs (12)
<< Back
Undo Changes
Save
Next >>
12 a Purpose for which contributions are used:
12a
Help homeless children.
b Programs for which contributions are used:
b
Homeless shelter.
Delete
<< Back
Undo Changes
Save
Next >>
By Selecting the question mark button a pop-up Help Menu will provide instructions for completing fields.
Purpose and Programs (12) - Hawaii - Unified Registration Statement Help
Programs
Enter the program services provided in the boxes provided. Describe each programs separately. If additional boxes are required, fill in the existing boxes and click the Save button. Additional boxes will be provided when the page refreshes.
Reference: Common_Programs

To add officers, select the Add a New Record Button


efile form990.org
Electronically File your Form 990 and State Registration Forms
Quick Jump | Forms | State Information | Logout
User: 11900100801 Name: Tom Smith, Urban Institute Filing: 43529
Hawaii - Unified Registration Statement
Financial (21-22)
<< Back
Undo Changes
Save
Next >>
21 Amount paid to PFR/PS/FRC during previous year 21 1,000
22 A Total contributions 22A 10,000
B Program service expenses B 100,000
C Management and general expenses C 14,000
D Fundraising expenses D 1,000
E Total expenses E 115,000
F Fundraising expenses as a percentage of funds raised F 10
G Fundraising expenses plus management and general expenses as a percentage of funds raised G 150
H Program services as a percentage of total expenses H 87
<< Back
Undo Changes
Save
Next >>
Grey fields are automatically calculated by our system

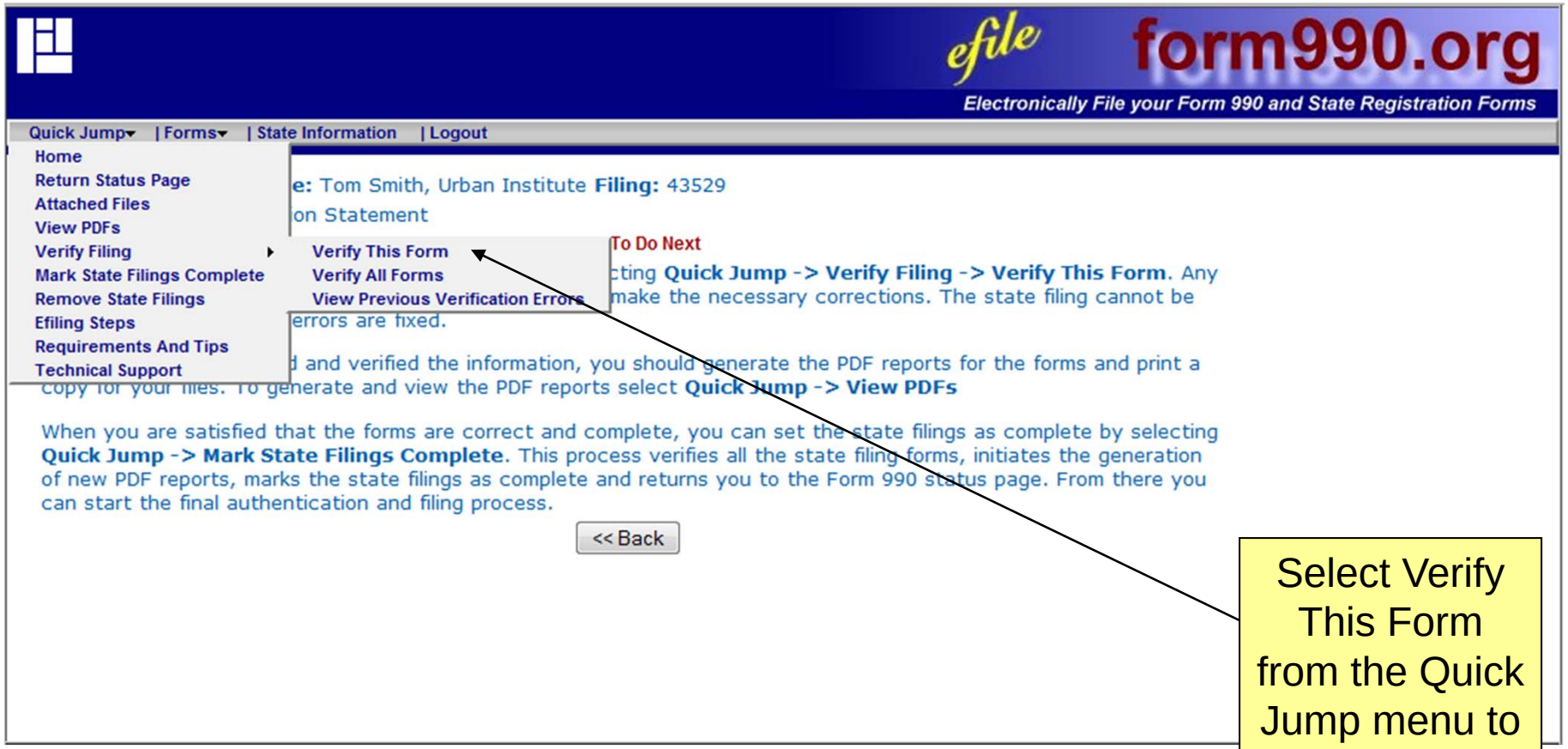


Two different Board members must be selected.

They both will need to authenticate the return.

They need to be registered with our system, in order for you to select them here.

Verification



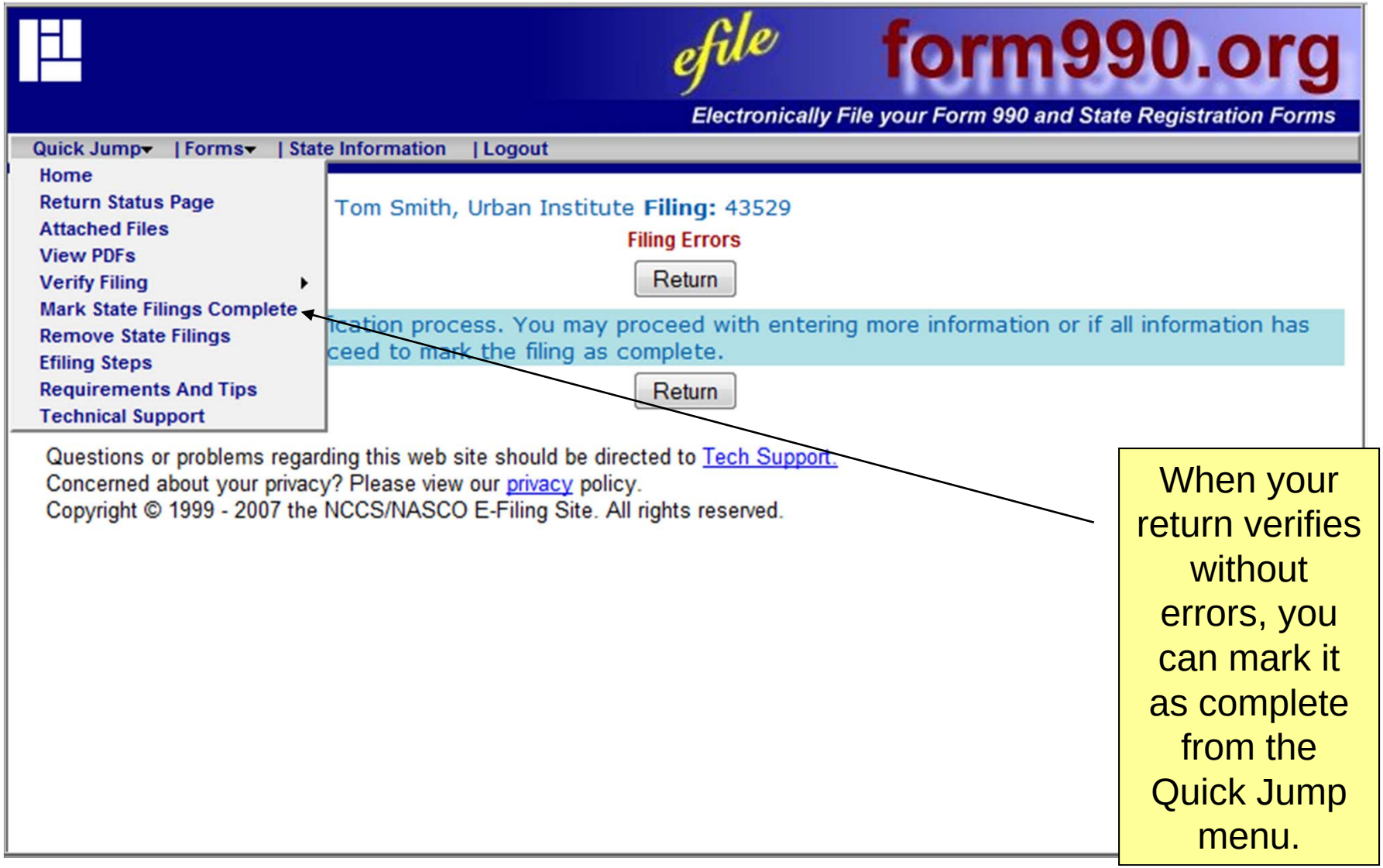
Select Verify This Form from the Quick Jump menu to begin the Verification Process

Verification - Step 2

When you verify your return, errors will be listed that you will need to correct before you mark the return as complete.

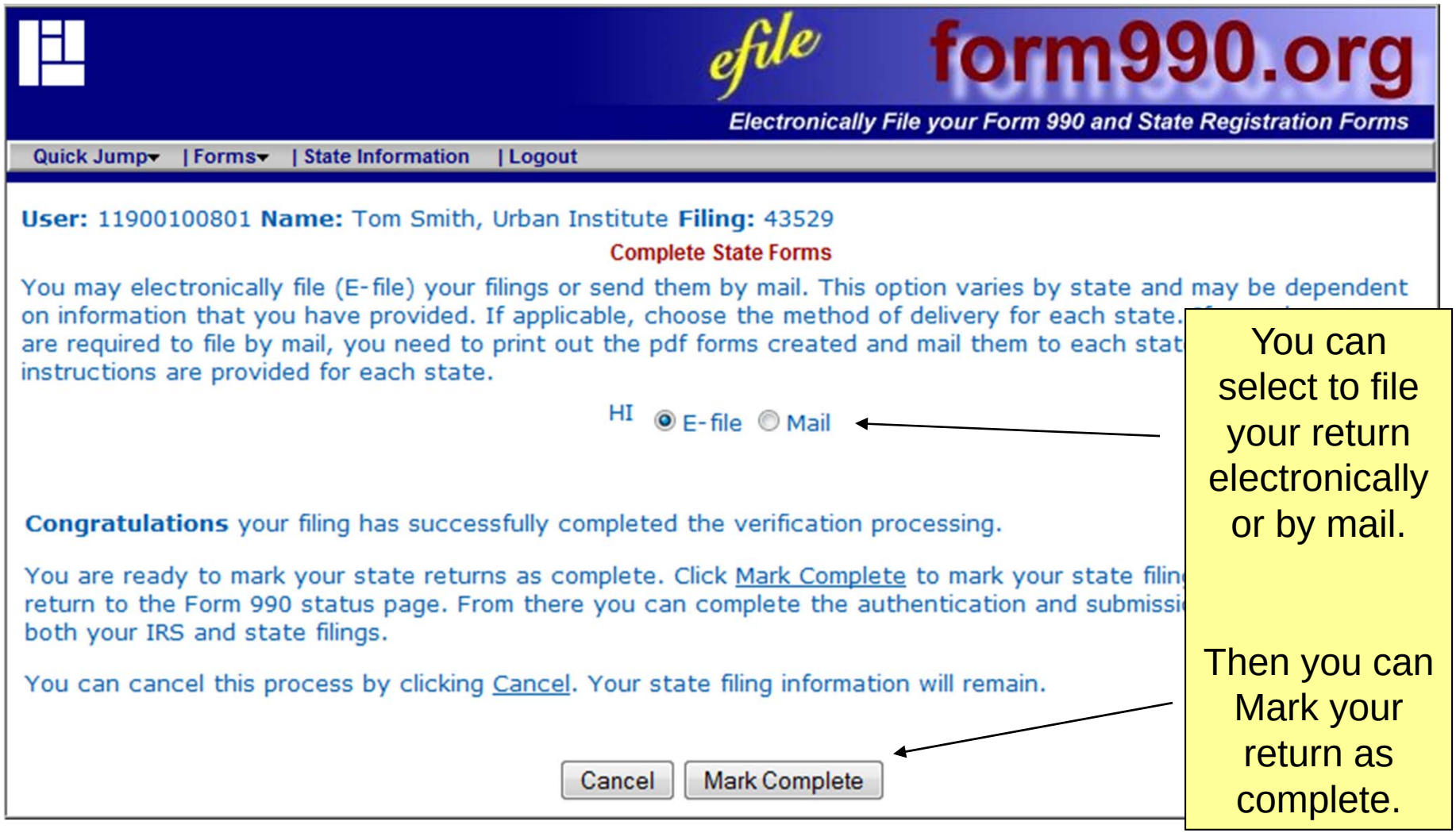
You can click on error to jump to that part of the return

Verification – Step 3



When your return verifies without errors, you can mark it as complete from the Quick Jump menu.

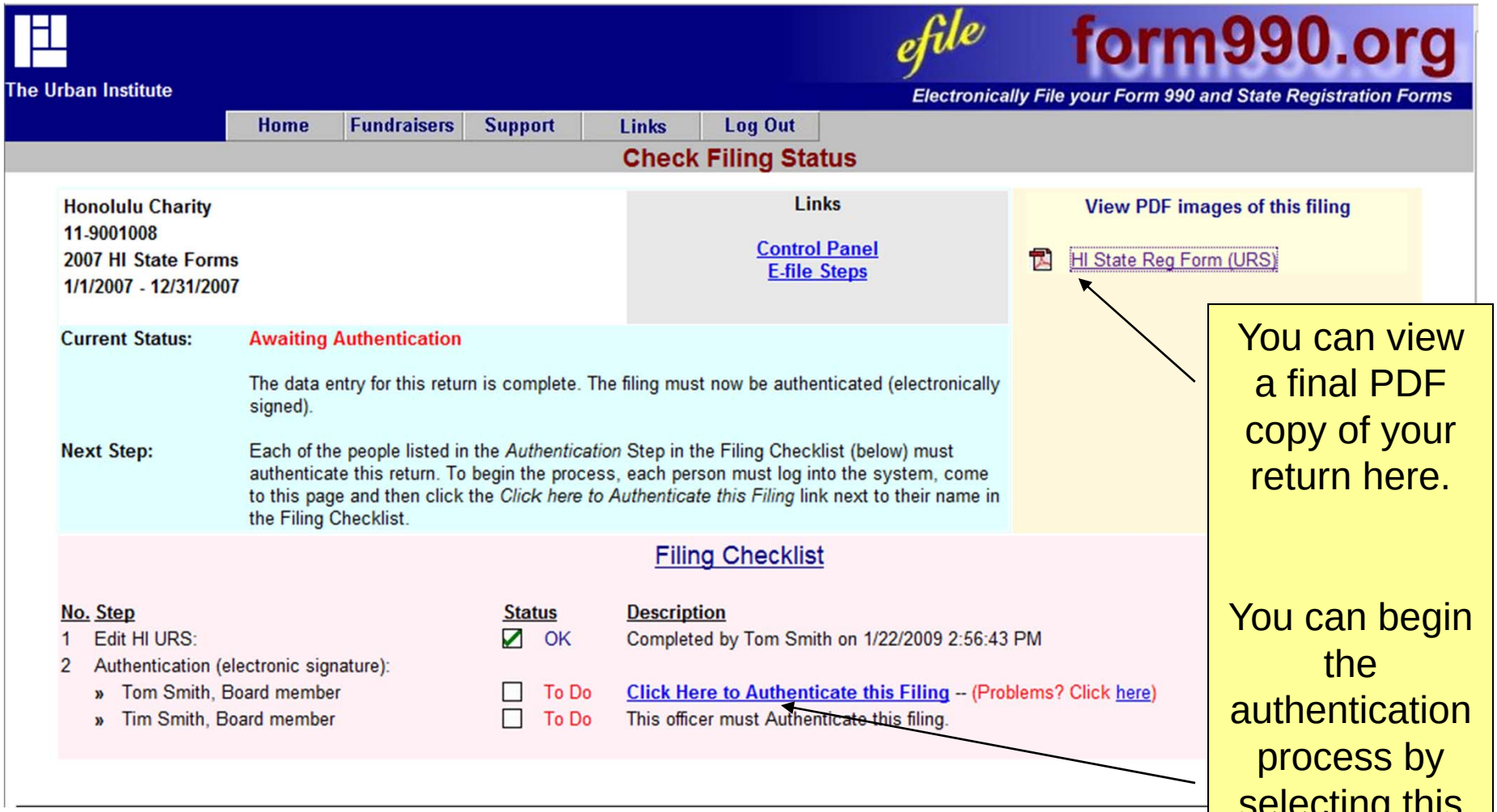
Verification – Step 4



You can select to file your return electronically or by mail.

Then you can Mark your return as complete.

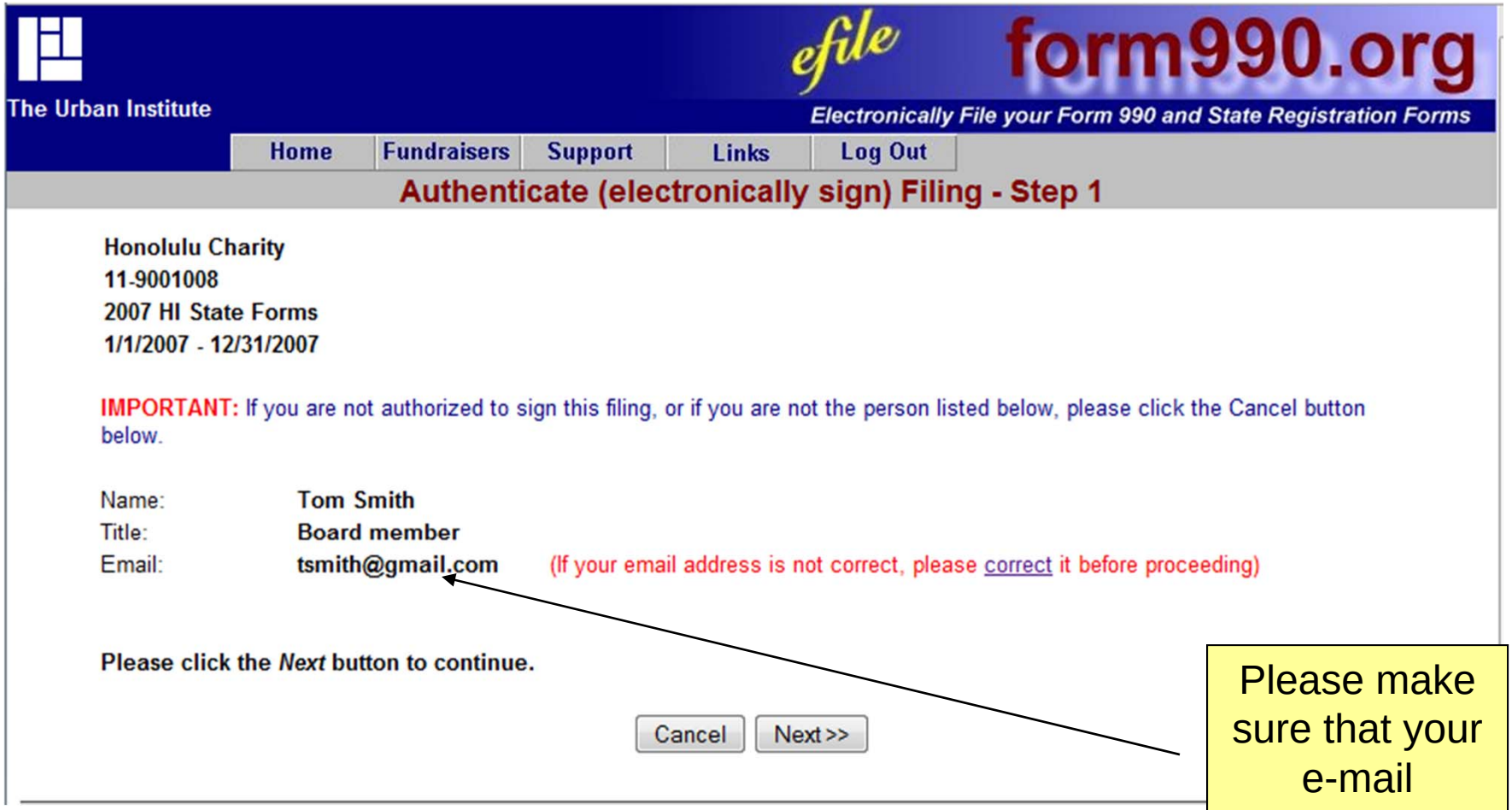
Authentication



You can view a final PDF copy of your return here.

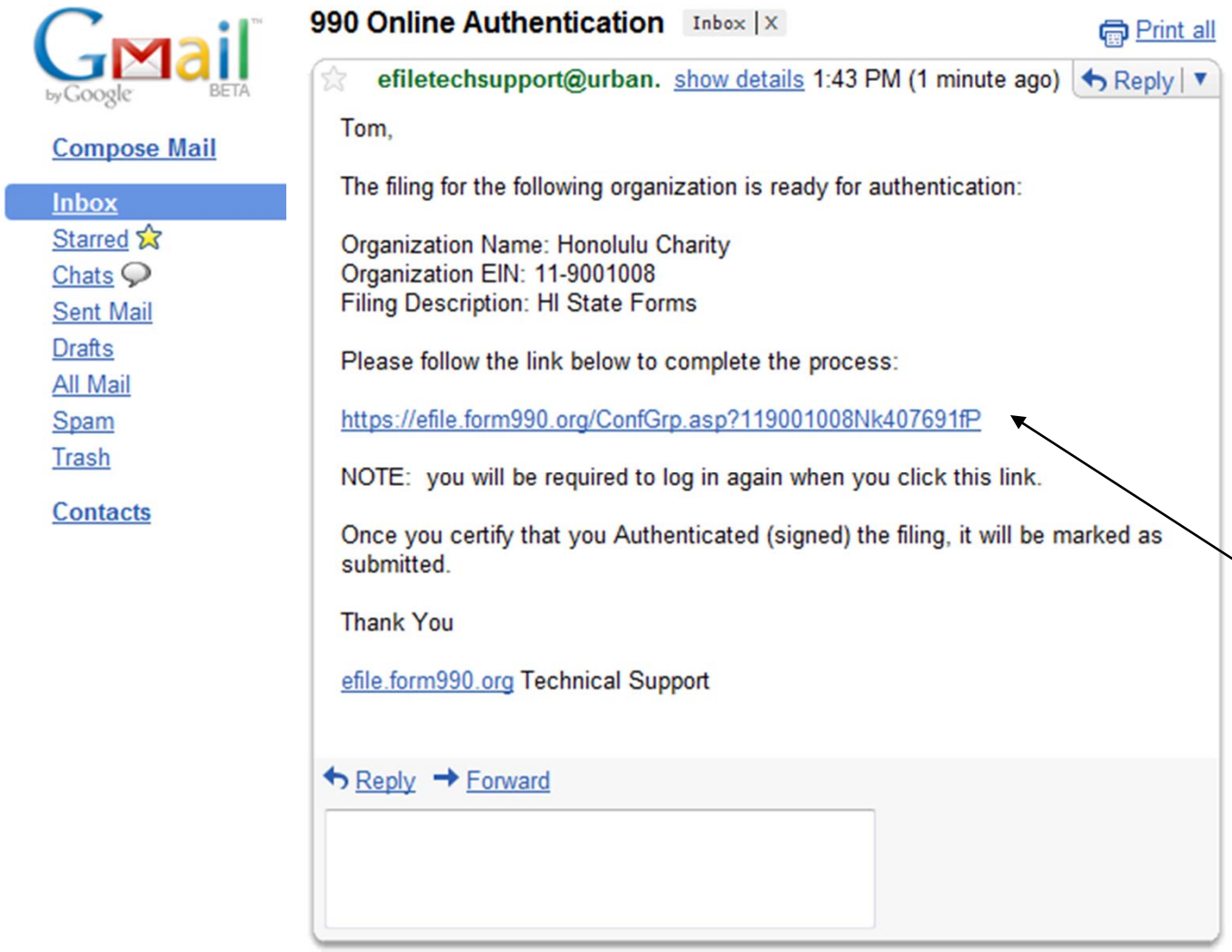
You can begin the authentication process by selecting this link.

Authentication – Step 2



Authentication – Step 3

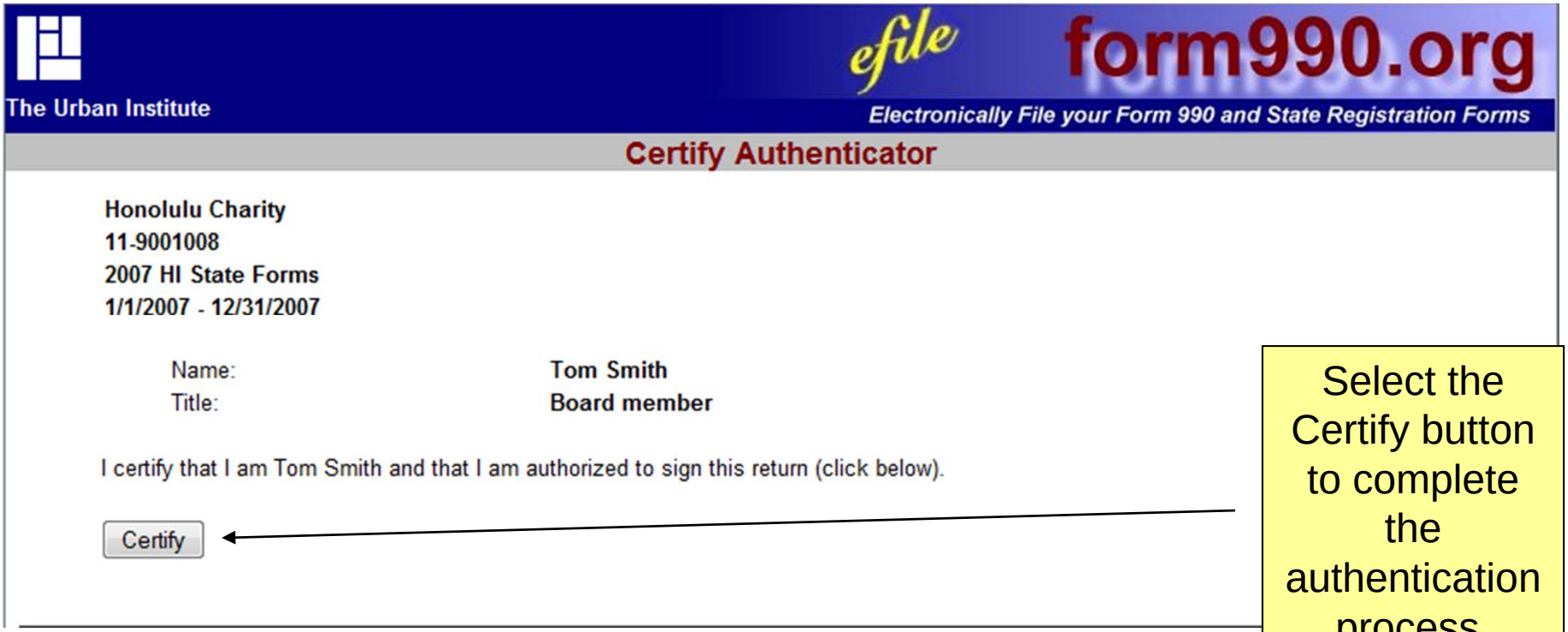
Authentication – Step 4



You should receive an e-mail like this from efiletechsupport@urban.org.

Select this link to complete the authentication process.

Authentication – Step 5



Select the Certify button to complete the authentication process.

Congratulations! Once you complete the authentication process, you have completed the electronic filing process. You should receive an e-mail confirmation that you return has been transmitted within 24 hours.