

### Overview of the Form 990 Online E-Filing System

A <u>free</u> tool for nonprofit organizations from the nonprofit National Center for Charitable Statistics at the Urban Institute (Washington, DC)



#### Drop-down banner menus provide easy navigation from any screen to all Form 990 or 990-EZ sections, schedules, attachments, and instructions.







Electronically File your Form 990 and State Registration Forms

Ouick lump	efile form990.org Electronically File your Form 990 and State Registration Forms
<ul> <li>Form 990-E2</li> <li>Organization Info.</li> <li>Part I</li> <li>Balance Sheet Detail</li> <li>Prog. Serv. Details</li> </ul>	Access and edit any section of Form 990 or 990-EZ any time, including relevant statements and attachments.
<ul> <li>List of Officers</li> <li>Other Information</li> <li>Signature Section</li> </ul>	

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• Quick Jump → 🔹 Form 990-EZ → 🔤 Schedule A	▼ Schedule B ▼ • IRS Instructions ▼ • Logout
<ul> <li>Schedule A</li> <li>Schedule B</li> </ul>	Users are guided through
<ul> <li>Highest Paid Employees</li> </ul>	sections of the Form 990,
<ul> <li>Highest Paid Contractors</li> </ul>	990-EZ and Schedules A
Statements About Activities	& B that only pertain to
• Non-Private Foundation Status	their nonprofit
• Part IV A •	organization.
Private School Questionnaire	
• Part VI A 🔸	
<ul> <li>Honelecting Public Charities</li> </ul>	
<ul> <li>Transactions &amp; Relationships</li> </ul>	



### **IRS instructions are available from any screen.**

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•	Quick Jump → Form 990-EZ → Schedule A → Schedule B →	• IRS Instructions 🔻 • Logout
		• IRS instructions 🔻 🕒 Lo
	Image: Copy	• Form 990 & Form 990-EZ
Bookmarks	2003 Department of the Treasury Internal Revenue Service	Schedule A     Schedule B
oignatures	Instructions for Form 990 and Form 990-EZ	
Layers	Return of Organization Exempt From Income Tax and Short Form Return of Organization Exempt From Income Tax Under Section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except black lung benefit trust or private foundation)	
Layou	Note: Form 990-EZ is for use by organizations with gross receipts of less than \$100,000 and total assets of less than \$250,000 at the end of the year. Section references are to the Internal Revenue Code unless otherwise noted.	
	Contents     Page     Contents     Page     complete and accurate and fully describes the organization's programs and accurate and fully describes the organization	



# The Control Panel offers a convenient way to create, access, and manage multiple returns.

#### ACME Charity, Inc.

#### Important Tips! Please Read.

- a) The changes you made on a page will not be saved if you use browser's "Back" or "Forward" buttons. You should use "Next" and "Previous" buttons on the pages for navigation.
- b) If your browser is inactive for 30 minutes you will automatically be logged out of the system and you will lose any unsaved information you may have entered. You will receive a warning two minutes before your session is closed. To avoid this, please save your data frequently.

No.	Delete	Tax Year	Start Date	End Date	Created On	Amended	Status	View PDF	Action
1.		<u>2003</u>	1/1/2003	12/31/2003	2/25/2004	No	Verified	<u>View</u>	Edit or Verify

Delete Checked Items

<u>Create New Return</u>



# Filing requirements are identified prior to creating a new return.

Form 990 or Form 990-EZ Requirements:

This website allows you to enter and electronically file a Form 990-EZ. Please answer the following questions to see if you are eligible to enter a Form 990-EZ (rather than a full Form 990).

	Line	Yes/No
Did your organization have Gross Receipts of \$100,000 or more?	1	🕐 No 💌
<sup>2</sup> Does your organization have assets of \$250,000 or more?	2	🕐 No 💌
<sup>3</sup> Did your organization have unrelated business gross income of \$1,000 o more?	r 3	🕐 🛛 🕐
Only for 501(c)(4), 501(c)(5) or 501(c)(6) Organizations:		
<sup>4</sup> Was your organization subject to the Lobbying Proxy Tax (section 6033(e) o the IRS Code)?	f 4	🕐 🛛 🕐
If you answered "No" or "NA" to all these questions, your organization may file	a Form 9	90-EZ.



#### The option to e-file is determined for each return. Any 990-EZ return can be completed and mailed to the IRS, regardless of e-filing eligibility.

#### E-filing Requirements:

The IRS now allows you to e-file your Form 990-EZ Return. There are certain cases, however, where the IRS will not accept an e-filed return. Please answer the following questions to make sure you are eligible.

Note: Even if you are not eligible to e-file, you may still complete your Form 990-EZ at this website, print it out, and mail it to the IRS.

<sup>1</sup> Has your organization's name changed? <sup>1</sup>	(?)	No 🔽
<sup>2</sup> Is this the final return for your organization (For example, the organization <sup>2</sup> ceased operations.)?	(?)	No 💌
<sup>3</sup> Is this an amended return? <sup>3</sup>	(?)	No 🔽
4 Is your organization's application for tax-exempt status pending?	(?)	No 🔽
<sup>5</sup> Was there a liquidation, dissolution, termination or substantial contraction during <sup>5</sup> the year?	(?)	No 💌
If you answered "No" to all these questions, your organization may e-file your Form 9	90-EZ.	





#### 990 return information can be carried from one year to the next. Data entry is simplified with drop-down menus, calculated fields, and on-line help.

Return Information									
Enter the organization name ACME Charity, Inc.									
Enter the employer identification number (EIN) 00 - 100101 (12-3456789)	0								
Enter the start date for this return	End 🗖			_(	$\nabla$				
	토 < Dec ♥ 2003 ♥ > X								
Note: If the system finds a return for the same EIN for an earli	er year, it will continentation	S	Μ	Т	W	Т	F	S	
to copy mormation from that return to the return you are cun	entiy entering	30	1	2	3	4	5	6	
		7	8	9	10	11	12	13	
Questions or problems regarding this web site should be directed to Tec	h Support	14	15	16	17	18	19	20	
Concerned about your privacy? Please view our privacy policy.	<u>in Supporei</u>	21	22	23	24	25	26	27	
Copyright © 1999 - 2004 the NCCS/NASCO E-Filing Site. All rights reserv	ed.	28	29	30	31	1	2	3	
Web site developed and maintained by <u>Strictly Software, Inc.</u> Last modified: February 18, 2004. This website is best viewed with Microsoft Internet Explorer 5.5+ in 102 You are currently using Microsoft Internet Explorer 6.0 in 800x600 resolu	4x768 resolution ition.	1							

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Form 990-EZ Part-IV List of Officers, Directors, Trustees and Key Employees - Microsoft Internet Explo..

🗿 IRS instruction or NCCS tip for the selected page or field. - Microsoft Internet Ex... 📰 🗖

Image Level IRS Instruction

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O Page Level NCCS Tip

#### Part IV: List of Officers, Directors, Trustees, and Key Employees

List each person who was an officer, director, trustee, or key employee (defined below) of the organization at any time during the year even if they did not receive any compensation from the organization. Enter a zero in columns (B), (C), (D), or (E) if no hours were entered in column (B) and no compensation, contributions, expenses, and other allowances were paid during the reporting year, or deferred for payment to a future accounting period. Give the preferred address at which officers, etc., want the Internal Revenue Service to contact them. Use an attachment if there are more than four persons to list in Part IV.

Show all forms of cash and noncash compensation received by each listed officer, etc., whether paid currently or deferred.

If you pay any other person, such as a management services company, for the services provided by any of your officers, directors, trustees, or key employees, report the compensation and other items in Part IV as if you had paid the officers, etc., directly.

Page and linespecific IRS instructions and expert tips are provided on every screen by clicking on the orange question mark. 🤇



Questions are presented in same order as the 990 or 990-EZ return. Users can save changes any time to exit and return to a section.

Form 990-EZ (Page-1) Organization Information							
Save Changes Click this button to save changes before jumping to another page.							
A For the tax year period beginning ( )	1/1/2003 🔽 🔽 and ending 🕐 12/31/2003						
<sup>B</sup> Check if 🕐 🗖 Change of Address 🕐	🗌 Initial Return 🕧 🔲 Amended Return (required also	for					
🕐 🗖 Change of Name 🛛 🥐	Final Return (?) Application Pending						
<sup>C</sup> Name of organization	CME Charity, Inc.						
Number and street (or P.O. box)	P.O. Box 888						
Room/suite							
City or town	(2) Anytown						
State or county	🕐 Maryland 🔽						
ZIP + 4	20888						
Employer identification number (12- 3456789)	(2) 00 - 1001010						

#### Sample of 990-EZ, Part I, Revenues Section

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			Electronically Fil	e your F	orm 990 a	and State Registration
Jump 🔹 🔄 Form 990-EZ 🔹 🔄 Schedule A 🔹 🗐 Schedule B 🔹	IRS I	Forms & In	structions 👻 🔹 Logo	nt		
Form 990-6	7 (Pac	1e-1. Pa	t-I)			
Reve	enue D	etails				
Save Changes Click this button to save changes before jun	nping to	another	page.			()
Powenue from	Lino		Dotaile	Lino		Total
Contributions, gifts, grants, and similar amounts received	Line		Details	1	0	3 000 00
<sup>2</sup> Program service revenue including government fees and				2	0	200.00
contracts				2		200.00
Membership dues and assessments				3		500.00
Investment income				4	<b>U</b>	99.00
Sale of Assets other than Inventory	1		Attach			
<ul> <li>Gross amount from sale of assets</li> </ul>	Jd		12,200.00			
Less: cost or other basis and sales expenses	ac	0	5,100.00			
<ul> <li>Gain or (loss) from sale of assets other than inventory (line 5a less line 5b)</li> </ul>				5c	0	7,100.00
6 Special events and activities			Attach			
If any amount from gaming, check here 📀 🗖						
<sup>a</sup> Gross Revenue	6a	0	5,400.00			
<sup>b</sup> Less: direct expenses other than fundraising expenses	бb	0	3,100.00			
<ul> <li>Net income or (loss) from special events and activities (line called line (loss)</li> </ul>				6c	0	2,300.00
CONTRIBUTIONS from special events					0	10 200 00
7 Sales of inventory					<b>U</b>	10,200.00
<sup>a</sup> Gross sales of inventory, less returns and allowances	7a	0	1,001.00			
b Less: cost of goods sold	7b	0	700.00			
		14				

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### Sample of 990-EZ, Part I, Lines 5a-c Schedule of Gain (Loss) from Sale of Assets



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### Sample of 990-EZ, Part I, Lines 6a-c Schedule of Special Events and Activities



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### Sample of 990-EZ, Part I, Expenses Section

Form 990-EZ (Page-1, Pa	rt-I)		
Expenses Details			
Save Changes Click this button to save changes before jur	nping to		()
another page.			
Expense Item	Details Line	l	Total
<sup>10</sup> Grants and similar amounts paid (attach schedule)	Attach 10		5,000.00
<sup>11</sup> Benefits paid to or for members	11	(?)	0.00
<sup>12</sup> Salaries, other compensation, and employee benefits	12		0.00
<sup>13</sup> Professional fees and other payments to independent contractors	13		1,200.00
<sup>14</sup> Occupancy, rent, utilities, and maintenance	14		6,000.00
<sup>15</sup> Printing, publications, postage, and shipping	15	(?)	400.00
<sup>16</sup> Other expenses (describe)	Attach 16	(?)	3,000.00
17 Total expenses (add lines 10 through 16)	17		15,600.00
Previous			

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### Sample of 990-EZ, Part I, Line 10 Schedule of Grants and Similar Amounts Paid





# Net Assets and other calculated fields are displayed for review.

#### Form 990-EZ (Page-1, Part-I) Net Assets or Fund Balances Detail

	Asset Item	Line	Details	Total	
18	Excess or (deficit) for the year (line 9 less line 17)	18	() ()		1,020.00
19	Net assets or fund balances at beginning of year (from line 27, column (A)) (must agree with end-of-year figure reported on prior year's return)	19	()		6,500.00
20	Other changes in net assets or fund balances (attach explanation)	20	Attach 🕐		0.00
21	Net assets or fund balances at end of year (combine lines 18 through 20)	21	] 🕚		7,520.00
	Previous Next >				

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### Sample of 990-EZ, Part II, Balance Sheets Section



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### Sample of 990-EZ, Part IV

#### List of Officers, Directors, Trustees and Key Employees

Form 990-EZ (Page-2, Part-IV) List of Officers, Directors, Trustees and Key Employees List each one even if not compensated.

Delete	Name	Title	Hours	Compensation	Expense Accounts
	Jennifer Winger	Treasurer	15.00	0.00	0.00
	Ronald Smith	President	5.00	0.00	0.00

Delete Checked Items

	Complete form below and click "Add New Details" to save.	
<sup>1</sup> Name	1 🕐 Thomas Harrison	
<sup>2</sup> Title	² 🕐 Secretary 🔽	
<sup>3</sup> Country	3	
	United States	*
<sup>4</sup> Address	4 🕐 P.O. Box 888	
<sup>5</sup> City	<sup>5</sup> 🕐 Anytown	
		Interesting the property

(?)

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### **Sample of Signature Section**

Form 990-EZ - (Signature Section)

Save Changes

Click this button to save changes before jumping to another page.

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

#### For Officer:

- A Name of Officer
- <sup>B</sup> Title
- Email Address
- D Telephone Number
- E Date of Signature

#### For Paid Preparer:

F Firm Name

Ronald Smith	
President	*
rsmith@anyco.com	
123-777-7777	
02-27-2004 🔽 (MM	-DD-YYYY
	Ronald Smith President rsmith@anyco.com 123-777-7777 02-27-2004

# Users are guided through relevant sections of Schedule A based on their answers on Part IV.

Schedule A Part IV Reason for Non-Private Foundation Status Save Changes Click this button to save changes before jumping to another page. The organization is not a private foundation because it is: A church, convention of churches, or association of churches. Section 170(b)(1)(A)(i). 5 A school. Section 170(b)(1)(A)(ii). (Also complete Part V.) 6 A hospital or a cooperative hospital service organization. Section 170(b)(1)(A)(iii). A Federal, state, or local government or governmental unit. Section 170(b)(1)(A)(v). 8 A medical research organization operated in conjunction with a hospital. Section 170(b)(1)(A)(iii). 9 **Hospital Name** City State An organization operated for the benefit of a college or university owned or operated by a 10 governmental unit. Section 170(b)(1)(A)(iv). (Also complete the Support Schedule in Part IV-A.) An organization that normally receives a substantial part of its support from a governmental unit or 11 a | from the general public. Section 170(b)(1)(A)(vi). (Also complete the Support Schedule in Part IV-A.)

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### Sample of Schedule B, Part I List of Contributors

Schedule B						
				(1)		
Delete	Name	Address	City	Amount		
	Penny Lane	Winding Road	Anytown	2,500.00		
Delet	te Checked Items					
		Schedule I	B - Part I			
		Contrib	outors			
(a) Numbe	r	2				
(b) Name of contributor		🔇 🛛 Art Kraft				
Contributor's Country		(?)				
		United State	s	*		
Contrib	outor's Address	🕐 Stickley	Drive			
Contributor's City/Town		🔇 Anytowr	1			
Contributor's State		🕐 Marylar	nd 💌			
Contributor's ZIP		(?) 20888				
(c) Aggreg	ate contributions	(1)	200.00			

# Upload lists from Excel into Schedule B & some attachments

form990.org

	Upload Attachm	nent - "Schedule B - Part I, Part I	I and Part III"						
Please se	elect the Excel file to upload:		Browse						
		2.327							
		Submit Cancel							
<u></u>									
Diabt alial	the "Deweload Template" link and then a	elect "Coup Toront Ac" to downlood	t an Eucal template file farithe attachment						
"Schedule	B - Part I, Part II and Part III". The Tem	plate contains the required column	headers for the import spreadsheet.						
C - Brower de la ried-		Download Template							
and the second second second	Download template								
Please clio	ck the "Attachment Tips" button for addit	ional help and information about the	e Attachment Import Utility.						
	Attachment Tips								
1									
The table	below displays the Excel file format for th	ne attachment "Schedule B – Part I.	, Part II and Part III":						
Column I	Name Column Header Name	Column Data Type	Predefined Values						
A	Type Of Name	Text	'Person' Or 'Business' Or 'pd527(j)(1)'						
В	Name	Text							
С	Address	Text							
D	City	Text							
0									
E	State	Text							
E	State Zip	Text Text							

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# Users are prompted to view and verify the return once all relevant sections are complete.

			efile	form9	90.org
		**************************************	Electronicall	y File your Form 990 and Stat	te Registration Forms
• Quick Jump 🛛 👻	• Form 990-EZ 🔻	• Schedule A 🔫	Schedule B	▼ • IRS Instructions ▼ •	Logout

#### Congratulations. You have completed the data entry for your Form 990-EZ.

#### You may now perform one of the following options:

- O You can use the menus above to go back and edit any of the information you have entered.
- <sup>O</sup> Click <u>here</u> to have the system generate a PDF of your Form 990-EZ so that you can view the information you have entered.
- <sup>o</sup> Click <u>here</u> to verify your return to make sure that you have entered all the required information.
- Click <u>here</u> to return to the Form 990-EZ Control Panel.

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# The verification process identifies errors and omissions, prompting the user to make corrections prior to filing the return.

Verifying Required Information . . .

**REQUIRED INFORMATION VERIFICATION COMPLETE - STATUS: SUCCESS** 

Verifying Data Integrity . . .

DATA INTEGRITY CHECK COMPLETE - STATUS: SUCCESS

Verifying Attachments . . .

Unused attachment deleted: Form: 990 Part: Question: Page: Action Required: No

ATTACHMENT VERIFICATION COMPLETE - STATUS: SUCCESS

The verification of this return was successful. Now you can mark this return as complete or choose any action from the following links.

Go to Control Panel Edit This Return Verify This Return Mark This Return As Complete

Electronically File your Form 990 and State Registration Forms

The completed Form 990 or 990-EZ with all attachments and schedules is viewed and downloaded as a PDF file. Users can print and mail the return to the IRS, or file electronically if eligible.

		efile f			form99	form990.org				
						Electron	nically	y File your Form 990 and Stat	e Registration For	ms
• Quick Jump	•	• Form 990	•	Schedule A		Schedule B	•	• IRS Forms & Instructions 🔻	• Logout	

Please click on the following liks to view the PDF document for the current return. You can also click on "Update the PDF with recent changes" link for creating new PDF document(s) for this return.

Note: Before clicking on the "Update the PDF with recent changes" link please close the PDF document if it is open.

Form 990 Package, Created On Friday, January 14, 2005 at 10:21:00 AM (Mountain Time)

Form Schedule B, Created On Friday, January 14, 2005 at 10:21:00 AM (Mountain Time)

Update the PDF with recent changes

Electronically File your Form 990 and State Registration Forms

### The completed Form 990 or 990-EZ with all attachments and schedules is viewed and downloaded as a PDF file. Users can print and mail the return to the IRS, or file electronically if eligible.

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🛛 🕼 Undo	🔊 Redo 📔 Co	py Rotate Clockwise	
Pages I Layers Signatures Bookmarks	Form 9990-EZ  Department of the Treasury Internal Revenue Service A For the 2003 calende B Check If applcable: Address change Intitial return Final return Americation pending • Section 501(c)(3) of I Web site:  VWW J Organization type (of K Check  I in	Short Form         Return of Organization Exempt From Income Tax         Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except black lung benefit trust or private foundation)         For organizations with gross receipts less than \$100,000 and total assets less than \$250,000 at the end of the year.         The organization may have to use a copy of this return to satisfy state reporting requirements.         ar year, or tax year beginning       01/01/03       , 2003, and ending       12/31/0         Please       C Name of organization       D Employe       00 1         use IRS       ACME Charity, Inc.       D Employe       00 1         Number and street (or P.O. box, if mail is not delivered to street address)       Room/suite       E Telephor         P.O. Box 888       city or town, state or country, and ZIP + 4       F Enter 4-4         Anytown, MD 20888       F Enter 4-4       Other (specify) ▶         macmecharity.org       H Check ▶ □ if is not required to Schedule A (Form 990 or 990-EZ).       H Check ▶ □ if is not required to Schedule B (Form 990 or 990-EZ).         macmecharity.org       H Check ▶ □ if is not required to Schedule B (Form 990 Reckare in the mail it should file a return without financial date. Some states required to Schedule B (Form 990 Reckare in the mail it should file a return without financial date. Some states required as form 990 Reckare in the mail it should file a return without financial date. Some states requir	OMB No. 1545-1150         2003         Open to Public Inspection         03 , 20         rr identification number         001010         ne number         8888-8888         digit (GEN) ▶       8888         od:       Cash ☑ Accrual         the organization         attach         n 990, 990-EZ, or 990-PF).         turn with the IRS; but if the         a complete return
		🛛 🖣 🛛 1 of 17 🔹 🔊   🜍 🜍	



# You will receive an e-mail notification when your return is sent to the IRS and another when it is accepted.

From: efiletechsupport@urban.org

Sent: Wednesday, January 12, 2005 11:18 AM

To: jane.Cfo@goodworks.org

Subject: Form 990-EZ E-filing Reciept - IRS Status: Accepted

Organization: Good Works, Inc. EIN: 99-0123456 Return Type: Form 990-EZ Return Year: 2003 IRS Return ID: 111111111111002228 Return Timestamp: 1/12/2005 11:13:40 AM IRS Accepted Date: 1/12/2005 11:15:00 AM

Thank you for using the Form 990 Online system for preparing and electronically filing your Form 990 EZ return. This email contains some important identifying information about the return we transmitted. You may want to keep this email in case you need to contact the IRS regarding your return.

The return described above was transmitted to the IRS. The IRS has ACCEPTED the return. Congratulations.

NOTE: The IRS does NOT reject returns for being late. If this return was transmitted to the IRS after the due date, and your organization has not filed a Form 8868 (Request for Extension), you may receive a letter from the IRS indicating whether your organization owes any penalties or other fees.

Please visit http://efile.form990.org to stay informed of enhancements to our efiling systems.

Once again, thank you for using the Form 990-EZ Online system.

e-file.form990.org technical support Phone: 866-518-3874 (toll free) email: efiletechsupport@urban.org