

## To upload document

1. At the Contractor Home page, Select the fiscal year and the type of filing from the dropdown menu.

OSD eFiling Wizard - Microsoft Internet Explorer

File Edit View Favorites Tools Help Back Forward Stop Home Address

Step 1 of 3 : UFR Filing with Audited Financials > Create Filing

## Create Filing

To create your UFR Filing with Audited Financials , please select the Fiscal Year for which you are filing. Then click Upload Documents.

If you would like to perform another type of filing click Cancel.

**Fiscal Year**

- Select Year--
- Select Year --**
- 2002
- 2003
- 2004

Cancel Upload Documents >>

Done Local intranet

2. If filing an **Exempt UFR**, Select the **Exempt Filing Category** from the dropdown and click **Upload Documents**.

OSD eFiling Wizard - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://osd-w3-efile.irs/efiling/initialfiling.asp?Type=2

Step 1 of 3 : Exempt Filing > Create Filing

## Create Filing

To create your Exempt Filing, please select the Fiscal Year for which you are filing. In addition please select an Exempt Filing Category. Then click Upload Documents. If you would like to perform another type of filing click Cancel.

**Fiscal Year**

Select Year...

**Exempt Filing Category**

Select...

501(c)(3)

501(c)(29)

501(c)(28)

501(c)(27)

501(c)(26)

501(c)(25)

501(c)(24)

501(c)(23)

501(c)(22)

501(c)(21)

501(c)(20)

501(c)(19)

501(c)(18)

501(c)(17)

501(c)(16)

501(c)(15)

501(c)(14)

501(c)(13)

501(c)(12)

501(c)(11)

501(c)(10)

501(c)(9)

501(c)(8)

501(c)(7)

501(c)(6)

501(c)(5)

501(c)(4)

501(c)(3)

501(c)(2)

501(c)(1)

501(c)(0)

Cancel Upload Documents >>

Done Local intranet

The required documents for this filing are displayed in the **Required Documents Check List** window.

OSD eFiling Wizard - Microsoft Internet Explorer

File Edit View Favorites Tools Help < Back -> < Search < Favorites < History < Go < Address < 4 of 3 Go <

## OSDeFiling

### Step 3 of 3: UFR Filing with Audited Financials - Upload Documents

#### Filing Details

**Filing Type**  
UFR Filing with Audited Financials

**Fiscal Year**  
2004

**Contractor**  
General Contractor

**CPA**  
Debbie and Touche LLP

**Upload Documents**

To upload a document, enter the following related information and then click on Upload. When you have uploaded all of the appropriate documents for this filing click Submit to OSD to continue. If you would like to complete the filing later you can save the current state of the filing by clicking Save For Later.

You cannot make changes to the file you have uploaded. To correct the contents of a file, you must delete the file by checking the box and clicking on the Delete Checksum Files icon. You must then upload the corrected file again.

Please review your files to ensure that they are the correct files for the contractor prior to submission to OSD.

**Note:** Saved filings (i.e., filings not submitted to OSD) not completed within 1 day(s) are deleted from the system.

#### Document(s) Included

<input type="checkbox"/> UFR Excel Template	<input type="checkbox"/> Independent Auditor's Report on the Financial Statements	<input type="checkbox"/> Auditor's Reports on Internal Controls/Compliance - GAGAS
<input type="checkbox"/> Independent Accountant's Review Report	<input type="checkbox"/> Audited Financial Statements (non-UFR Format)	<input type="checkbox"/> Reviewed Financial Statements (non-UFR Format)
<input type="checkbox"/> Notes to Financial Statements	<input type="checkbox"/> OMB A-133	<input type="checkbox"/> Board Acknowledgment Letter
<input type="checkbox"/> Auditor's Checklist & Certification Form	<input type="checkbox"/> Auditor's Management Letter	<input type="checkbox"/> AO's PC Form
<input type="checkbox"/> IRS Tax Return	<input type="checkbox"/> Written Request For Extension	Other <input type="text"/>

#### Application Type

Select Application:  Browse

#### Documents on File

No documents have been uploaded.

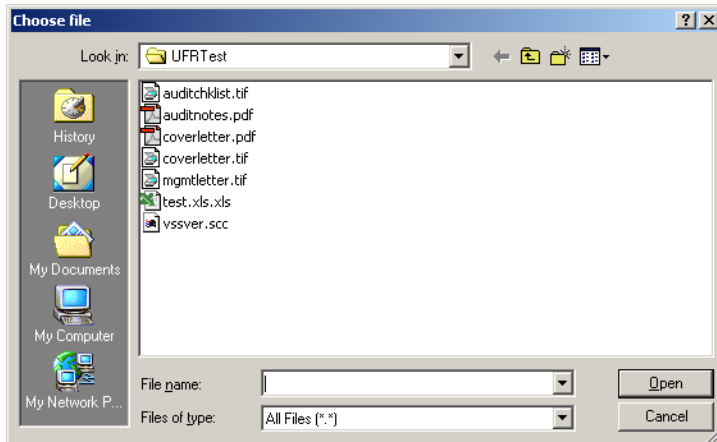
3. To upload documents for the filing, select one or more document categories from the checkboxes under **Document(s) Included**. Then select the type of file being uploaded from the **Application Type** dropdown list.

**NOTE:** The UFR Excel template must be selected on its own; it cannot be categorized with any other document. The UFR Excel template must be an Excel file type.

The File type given in the dropdown must match the extension of the file that is selected to be uploaded. Zip files may not be uploaded into the eFiling system. They must be uncompressed first, and then the unzipped documents must be uploaded separately.

To select the file to upload, click the **Browse** button.

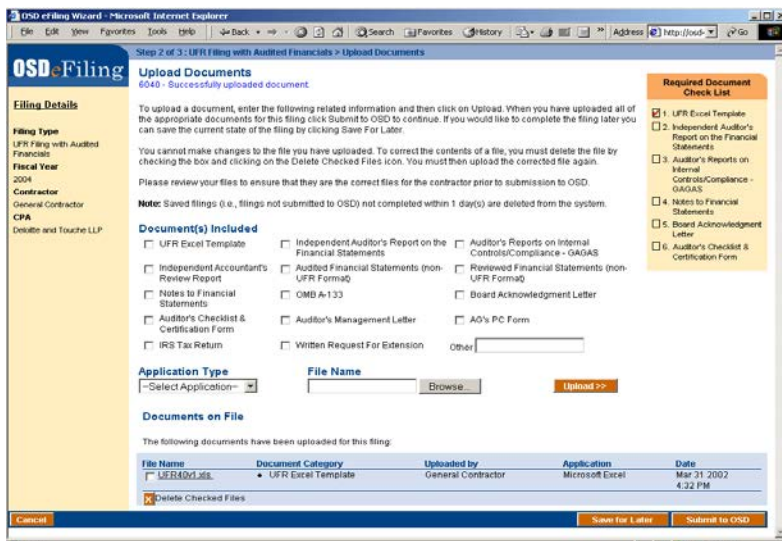
The **Choose File** file browser will appear.



Select the file by clicking to the appropriate directory and double-clicking the desired file.

Click the **Upload** button. The please wait screen will appear.

Upon successful completion of the upload, the Upload Files screen will reappear. The document just uploaded will appear in the list of **Documents on File**.



Clicking on the file name will bring up the **OSD eFiling Document Viewer**.

4. To delete a document, check the box adjacent to the file name and then click the **Delete Checked Files** button.

**OSD eFiling Wizard - Microsoft Internet Explorer**

Step 2 of 3: UFR Filing with Audited Financials > Upload Documents

**Upload Documents**  
6040 - Successfully uploaded document.

**Filing Details**  
Filing Type: UFR Filing with Audited Financials  
Fiscal Year: 2002  
Contractor: East Bay Inc.  
CPA: Deblute and Touche LLP

To upload a document, enter the following related information and then click on Upload. When you have uploaded all of the appropriate documents for this filing click Submit to OSD to continue. If you would like to complete the filing later you can save the current state of the filing by clicking Save For Later.

You cannot make changes to the file you have uploaded. To correct the contents of a file, you must delete the file by checking the box and clicking on the Delete Checked Files icon. You must then upload the corrected file again.

Please review your files to ensure that they are the correct files for the contractor prior to submission to OSD.

**Note:** Saved filings (i.e., filings not submitted to OSD) not completed within 1 day(s) are deleted from the system.

**Document(s) Included**

☐ UFR Excel Template  
☐ Independent Auditor's Report on the Financial Statements  
☐ Audited Financial Statements (non-UFR Format)  
☐ OMB A-133  
☐ Auditor's Management Letter  
☐ IRS Tax Return  
☐ Written Request For Extension  
☐ Other

**Application Type**  
--Select Application--

**File Name**  
Browse

**Upload >>**

**Documents on File**  
The following documents have been uploaded for this filing:

File Name	Document Category	Uploaded by	Application	Date
E:\ASB\UFR40_120thtest.xls	UFR Excel Template	East Bay Inc.	Microsoft Excel	2/4/2002 2:47:22 PM

☐ Delete Checked Files

**Cancel** **Save for Later** **Submit to OSD**

The information upload page will reappear. The file will be deleted from the UFR eFiling system.

**OSD eFiling Wizard - Microsoft Internet Explorer**

Step 2 of 3: UFR Filing with Audited Financials > Upload Documents

**Upload Documents**  
6024 - Successfully deleted document(s) from filing.

**Filing Details**  
Filing Type: UFR Filing with Audited Financials  
Fiscal Year: 2004  
Contractor: General Contractor  
CPA: Deblute and Touche LLP

To upload a document, enter the following related information and then click on Upload. When you have uploaded all of the appropriate documents for this filing click Submit to OSD to continue. If you would like to complete the filing later you can save the current state of the filing by clicking Save For Later.

You cannot make changes to the file you have uploaded. To correct the contents of a file, you must delete the file by checking the box and clicking on the Delete Checked Files icon. You must then upload the corrected file again.

Please review your files to ensure that they are the correct files for the contractor prior to submission to OSD.

**Note:** Saved filings (i.e., filings not submitted to OSD) not completed within 1 day(s) are deleted from the system.

**Document(s) Included**

☐ UFR Excel Template  
☐ Independent Auditor's Report on the Financial Statements  
☐ Audited Financial Statements (non-UFR Format)  
☐ OMB A-133  
☐ Auditor's Management Letter  
☐ IRS Tax Return  
☐ Written Request For Extension  
☐ Other

**Application Type**  
--Select Application--

**File Name**  
Browse

**Upload >>**

**Documents on File**  
No documents have been uploaded.

**Cancel** **Save for Later** **Upload >>**

**NOTE:** It is possible to save the filing for later by clicking the **Save for Later** button. However, any unsubmitted documents and filings left for more than 24 hours will be deleted.

- Once you have uploaded all of the required documents and any other documents you wish to include in the filing, click the **Submit to OSD** button. The Please Wait screen will appear.

**OSD eFiling Wizard - Microsoft Internet Explorer**

Please wait while Validating action.

Please wait while this operation continues.

□□□□□□□□□□□□□□□□□□□□

Opening page http://osd-w2k-efile1/efiling/TransactionReview.asp...

Upon successful validation of the filing, the Review filing screen will appear. The information that is displayed is:

- Fiscal Year
- Contractor contact information
- CPA Contact information
- Documents on File

**NOTE:** At this point, the uploaded documents are still being staged in the eFiling system. Carefully review this information prior to final submission to OSD to ensure that this is the correct information to be submitted for the UFR Filing.

OSD eFiling Wizard - Microsoft Internet Explorer

Step 3 of 3: UFR Filing with Audited Financials > Review Filing

**Review Filing**

Carefully review the following information submitted for this filing. If correct, click on Submit to OSD to complete the filing. If changes are required, click on Previous to update filing information.

**Filing Details**

**Fiscal Year:** 2004

**Type:** UFR Filing with Audited Financials

**Contractor:**  
General Contractor  
Address 1 Address 2  
City, CO 01010  
FEIN: 555999121  
Contact: General Contractor  
Phone: 888-333-4444

**CPA:**  
Deloitte and Touche LLP  
Addr1 Addr2  
Quintess, MA 02169  
FEIN: 014235843  
Contact: Ryan Johnson  
Phone: 238-233-2323

**Documents on File**

The following documents have been included in this filing:

File Name	Document Category	Uploaded by	Application	Date
UFRFilingProjectStatusReportNovember29,2001.doc	• Notes to Financial Statements • Auditor's Checklist & Certification Form	General Contractor	Microsoft Word	Mar 31 2002 4:38 PM
TechnicalArchitecturePresentation1-TLM.ppt	• Independent Auditor's Report on the Financial Statements • Auditor's Reports on Internal Controls/Compliance - OAGAS • Audited Financial Statements (non-UFR Format) • Board Acknowledgment Letter	General Contractor	Microsoft PowerPoint	Mar 31 2002 4:38 PM
UFR4001.xls	• UFR Excel Template	General Contractor	Microsoft Excel	Mar 31 2002 4:39 PM

<< Previous Submit to OSD >>

6. If all the required documents are present, click **Submit to OSD**. The **Please Wait** Screen will appear.

When the Submittal is finished, the **Filing Receipt and Confirmation** screen appears. The following information is displayed in the window:

- Who submitted the filing to OSD,
- When the filing was submitted.
- Receipt Number
- Fiscal Year
- Contractor contact information
- CPA Contact information
- Documents on File

OSD eFiling Wizard - Microsoft Internet Explorer

File Edit View Favorites Tools Help Back Forward Stop Search Favorites History Address SDAct.asp Go

**OSDeFiling** Filing Receipt and Confirmation [eFiling Home](#)

This filing was submitted to OSD by **General Contractor** on **Mar 31 2002** at **4:39 PM**.  
The filing receipt number is **555999121-2004.1**.

You and the selected CPA will receive a confirmation email. If you have any questions please contact the OSD at [UFRetfiling@osd.state.ma.us](mailto:UFRetfiling@osd.state.ma.us). Please print this confirmation page for your records.

**Filing Details**

<b>Fiscal Year:</b> 2004	<b>Contractor:</b> General Contractor Address 1 Address 2 City: CO 01010 FEIN: 555999121 Contact: General Contractor Phone: 666-333-4444	<b>CPA:</b> Deloitte and Touche LLP Addr1 Addr2 Quintess, MA 02189 FEIN: 014235843 Contact: Ryan Johnson Phone: 238-233-2323
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**Type:**  
UFR Filing with Audited Financials

**Documents on File**

The following documents have been included in this filing:

File Name	Document Category	Uploaded by	Application	Date
UFRFilingProjectStatusReport-November29,2001.doc	<ul style="list-style-type: none"> <li>Notes to Financial Statements</li> <li>Auditor's Checklist &amp; Certification Form</li> </ul>	General Contractor	Microsoft Word	Mar 31 2002 4:39 PM
TechnicalArchitecturePresentation1-11M.ppt	<ul style="list-style-type: none"> <li>Independent Auditor's Report on the Financial Statements</li> <li>Auditor's Reports on Internal Controls/Compliance - OAOAS</li> <li>Audited Financial Statements (non-UFR Format)</li> <li>Board Acknowledgment Letter</li> </ul>	General Contractor	Microsoft PowerPoint	Mar 31 2002 4:39 PM
UFR401.xls	<ul style="list-style-type: none"> <li>UFR Excel Template</li> </ul>	General Contractor	Microsoft Excel	Mar 31 2002 4:39 PM

Done Local intranet

A confirmation e-mail will be sent to your email address as well as your CPA, as given in your profile. This e-mail will contain a summary of the information that was presented to you in the Filing Receipt.