

Massachusetts Attorney General’s Office Public Charities Online Filing Portal Instructions

Table of Contents

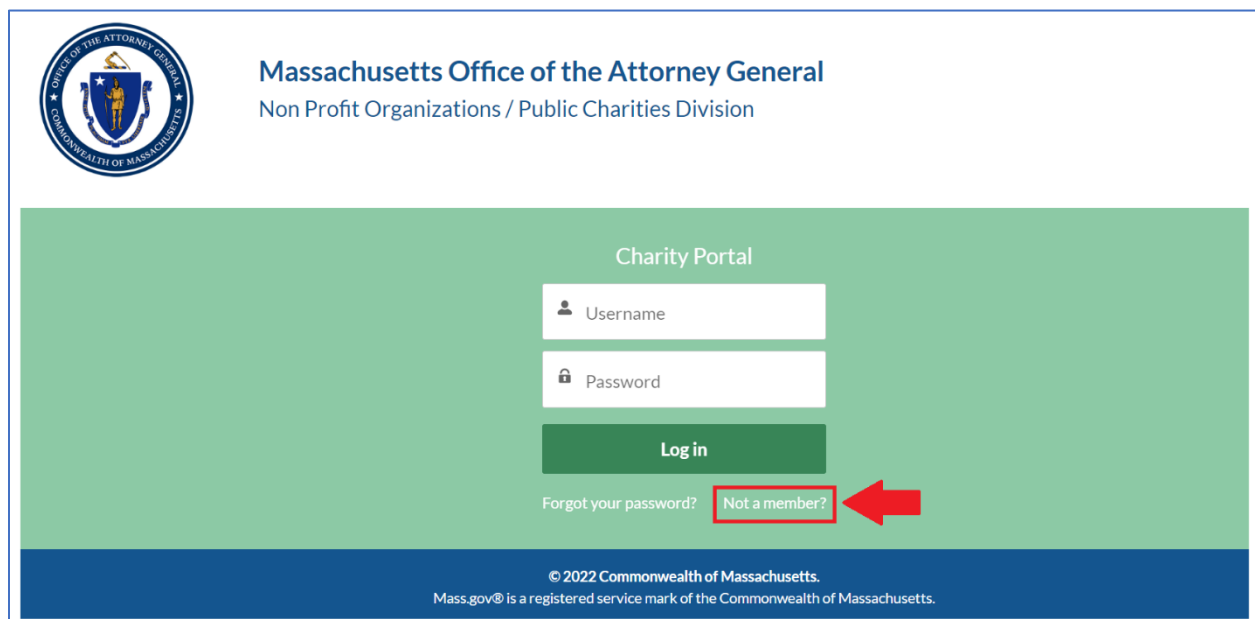
Links to Access	1
How to Sign Up for The Portal	1
When to Submit an Initial Charity Registration	2
How to Submit an Initial Charity Registration	2
How to Create an Annual Form PC Filing.....	3
Completing the Annual Form PC Filing in Multiple Sitings.....	4
How to Share a Draft of Form PC	6
How to Electronically Sign the Annual Form PC Filing/Schedule A2	7
How to Submit a Payment for a Charity’s Registration/Annual Form PC Filing/Schedule A2.....	8
How to Submit Charity-Related Documents	10

Links to Access

- [Charity Initial Registration Form](#)
- [Charity Portal](#) (Annual Form PC Filing & Schedule A2 Access)

How to Sign Up for The Portal

1. From the Portal website, click on the 'Not a member?' text.



The screenshot shows the login page for the Charity Portal. At the top left is the seal of the Commonwealth of Massachusetts. To its right is the text "Massachusetts Office of the Attorney General" and "Non Profit Organizations / Public Charities Division". The main content area has a green background and is titled "Charity Portal". It contains a "Username" input field, a "Password" input field, a "Log in" button, and two links: "Forgot your password?" and "Not a member?". A red arrow points to the "Not a member?" link. At the bottom, there is a blue footer with the text "© 2022 Commonwealth of Massachusetts. Mass.gov® is a registered service mark of the Commonwealth of Massachusetts."

2. Enter the requested fields: first name, last name, and email.

Note: If you are signing up via a link through email (i.e. if you have been assigned as a reviewer for a filing), you **must** use the same email address you received the link through to sign up. Failure to do so will result in not having access to review that filing.

Join the portal to manage your filings
and make payments.

First Name

Last Name

Email

Sign Up

Already have an account?

NOW, CHECK YOUR EMAIL

Check the email account associated with your user name for instructions on resetting your password. Remember to look in your spam folder, where automated messages sometimes filter. If you still can't log in, contact your administrator.

[Back to login](#)

3. Go to your email inbox and look for the email from Salesforce.
4. Click on the link provided in the email.
5. Change your password.

When to Submit an Initial Charity Registration

If the charity has never registered with the AGO (and does not have an Attorney General Account Number), gather the required information:

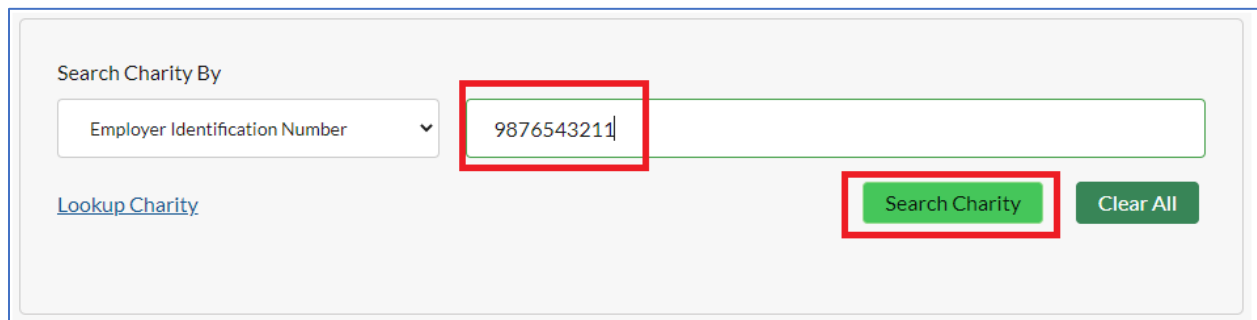
1. The Registration eForm requires basic information about the charity, such as address, contact information, type of organization (e.g., nonprofit corporation), and IRS tax exempt status.
2. In addition, you will also need electronic copies (pdf, doc, docx) of the following attachments:
 - a) Organization's charter, articles of organization, agreement of association, instrument of trust, or written statement of purpose, whichever is applicable.
 - b) List of the current officers/directors and their addresses.
 - c) Organization's by-laws.
 - d) IRS letter designating the organization's 501(c) status if the organization has received one.

How to Submit an Initial Charity Registration

1. Use the link provided to navigate to the Registration eForm. Right now, this initial Registration eForm is not accessible from the Portal.
 - Note: you will not have to sign into your Portal account to complete this step. Please provide accurate emails on the Registration, as these are the emails through which the AGO will contact the charity regarding the status of its registration.
2. Fill out the information in the Registration eForm. This is a short form and must be done in one sitting. Unlike the annual Form PC, you are not able to save & exit the form.
3. Once submitted, wait! The AGO will review the registration and notify you regarding whether the registration has been accepted.
4. You will be required to make a payment (excluding those with VCO status) after the AGO accepts the charity's registration and issues an Attorney General Account Number. You will receive an email from the AGO notifying you of the next steps, including whether you will need to submit a Schedule A2 if it is the charity's first fiscal year operating in Massachusetts and the charity plans to solicit.

How to Create an Annual Form PC Filing

1. Navigate to the Portal website.
2. Sign in using your email and password. If you have not made an account yet, please refer to the 'How to Sign Up' section.
3. Click on the 'Manage Form PC' button.
4. Type in the Attorney General Account Number or Employer Identification Number into the search bar. Click the 'Search Charity' button to return the results.



The screenshot displays a search interface for charities. On the left, there is a dropdown menu labeled "Search Charity By" with "Employer Identification Number" selected. To the right of the dropdown is a text input field containing the number "9876543211". Below the input field, there is a blue link labeled "Lookup Charity", a green button labeled "Search Charity", and a dark green button labeled "Clear All".

5. Using the dropdown, select the correct charity. Click on 'Get Form-PC Filings' button.

Search Charity By

Employer Identification Number

[Lookup Charity](#)

Select a Charity

-- Select --

-- Select --
Dog Walker Assc.
Yellow Flower Co

6. Scroll down to the 'Create a new Form PC' section.
7. Use the dropdown to select the fiscal year you wish to file for. Note: only the last five years are available for filing. Once you have selected a year, click 'Submit.'

Create a new Form PC

-- Select a year --

-- Select a year --
2022
2021
2020
2019
2018

Create a new Form PC

2022

8. A new page will load, and you are able to fill out the Form PC.

Completing the Annual Form PC Filing in Multiple Sittings

1. Complete the steps to create a Form PC.
2. Once information has been filled out and you wish to close the Form, use the 'Save and Close' button located at the bottom of the page. The page will reload and you will be brought to the Portal home page.

b) Trusts filing probate accounts; and
c) Trusts audited by certain state and federal agencies.

Financial Statement

[Upload Files](#) Or drop files

[Previous](#) [Next](#) [Save and Close](#)

© 2022 Commonwealth of Massachusetts.
Mass.gov® is a registered service mark of the Commonwealth of Massachusetts.

3. When you are ready to complete more of the Form PC, return to the Portal page.
4. Click on 'Manage Form PC' button.
5. Type in either the Attorney General Account Number or Employer Identification Number of the charity you have started the Form PC for. Click 'Search Charity.'
6. Scroll down the page to the 'Your Active Filings' section. Your draft Form PC filings should be displayed with the Filing Year and a Filing Status of 'In-Progress.'

 - Note: only the user who is signed in & started this filing will be able to see this.

Form-PC Filings [Refresh](#)

All Submitted Filings

Filing Year	Filing Status	NPCD Status	Submitted Date	
2022	Submitted		07/27/2022	View
2018	Submitted		08/04/2022	View

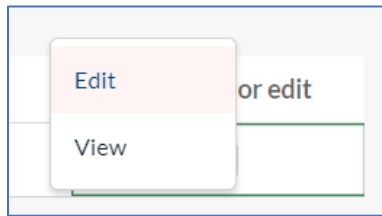
Your Active Filings

No filings found in the In-Review status.

Filing Year	Filing Status	Reviewer1 Status	Reviewer2 Status	Last Modified	Click to view or edit
<u>2018</u>	<u>In-Progress</u>			8/4/2022, 9:47 PM	▼

7. Click on the downward facing arrow on the right of the row. To continue working on the Form PC, click 'Edit.' This will open up the Form PC. (To simply view the information you have input so far, click 'View' and print to PDF if you wish to share a draft with others).

Filing Year	Filing Status	Reviewer1 Status	Reviewer2 Status	Last Modified	Click to view or edit
2018	In-Progress			8/4/2022, 9:47 PM	▼



How to Share a Draft of Form PC

Note: Only the individual who created the Form PC record will be able to perform this task.

1. Log into the portal. Click on 'Manage Form PC' and scope down to the AG Number of the form that you wish to share the draft of.
2. Scroll to 'Your Active Filings' where you will see the in-progress filing.

Your Active Filings

No filings found in the In-Review status.

Filing Year	Filing Status	Reviewer1 Status	Reviewer2 Status	Last Modified	Click to view or edit
2021	In-Progress			9/22/2022, 11:46 AM	▼

3. Use the arrow on the right side of the row and select 'View.' This will open a new tab with a printable view of the Form PC.

Filing Year	Filing Status	Reviewer1 Status	Reviewer2 Status	Last Modified	Click to view or edit
2021	In-Progress			9/22/2022, 11:46 AM	<div style="border: 1px solid red; padding: 2px;"> Edit or edit View </div>

4. Use the 'Print This Page' button to either save as a PDF and share electronically or to print the Form PC draft and share physically.

Charity Portal

- [Close Window](#)
- [Print This Page](#)
- [Expand All](#) | [Collapse All](#)

FPC-612483

▼ **Charity**

AGO Charity Record	Rec-64859	AG Charity Number	080003
Charity Name	Round 2 Charity w VCO Status		

Test field to Trigger the Payment Email

How to Electronically Sign the Annual Form PC Filing/Schedule A2

1. If the Annual Form PC Filing/Schedule A2 preparer is an Authorized Signatory for the charity, then the preparer can input their signature on the final tab “Form Submission.”
2. If additional signatures are required, the preparer will enter names and email addresses in the Reviewer’s Data tab.
3. If you are a Reviewer/Authorized Signatory (and non-preparer), you should navigate to your email inbox and search for the email titled ‘Annual Filing/Schedule A2 Filing for [Charity Name] Is Waiting for Your Review.’
4. Click on the link provided to you in the email. This will bring you to the Portal.
5. If you do not have a Portal account, create one now. Refer to ‘How to Sign Up’ instructions. If you do have a Portal account, log in.
6. Click ‘Manage Form PC’ or ‘Manage Schedule A2’ button.

Form PC

Click on button below to:

- Create, edit, send for review, & submit Form PC filing for your upcoming fiscal year
- Review Form PC filings in progress
- Check Form PC filing history

[Manage Form PC](#)

7. Type in either the Attorney General Account Number or Employer Identification Number of the charity for which you must review the filing. Click ‘Search Charity.’
8. Scroll down to the ‘Submitted Filings for Your Review and Signature’ section.

Submitted filings for your review and signature

Preparer	Filing Year	Filing Status	Last Modified	Click to review
Arun	2022	In-Review	8/4/2022, 9:47 PM	▼

9. Click on the arrow all the way to the right of the record you would like to open in the ‘Click to review’ column. Select ‘View.’
10. A new page will open where you can view the Form PC draft as well as the attachments included in the Form PC.

6charityuser@gmail.com

Form-PC Filings for asf

AGO Charity Num

068130

EIN

sfg

Preparer

Arun

Filing Year

2022

[Click here to view the Form-PC data.](#)

Supporting Documents

File Name	Uploaded By	File Size	Download
Principal Executives.docx	Arunsriram Jeyaprakash	11.68 KB	Download
Financial Statement.docx	Arunsriram Jeyaprakash	11.68 KB	Download
Federal Revenue Support.docx	Arunsriram Jeyaprakash	11.68 KB	Download

Under penalty of perjury, I declare that the information furnished in this report, including all attachments, is true and correct to the best of my knowledge.

- Select -

Submit

11. Review the data & documents and record your review decision of either ‘Accepted’ or ‘Needs Corrections.’ If it needs corrections, communicate with the eFiler offline what needs to be corrected, as they will not be notified at this time.

Under penalty of perjury, I declare that the information furnished in this report, including all attachments, is true and correct to the best of my knowledge.

- Select -

Submit

- Select -

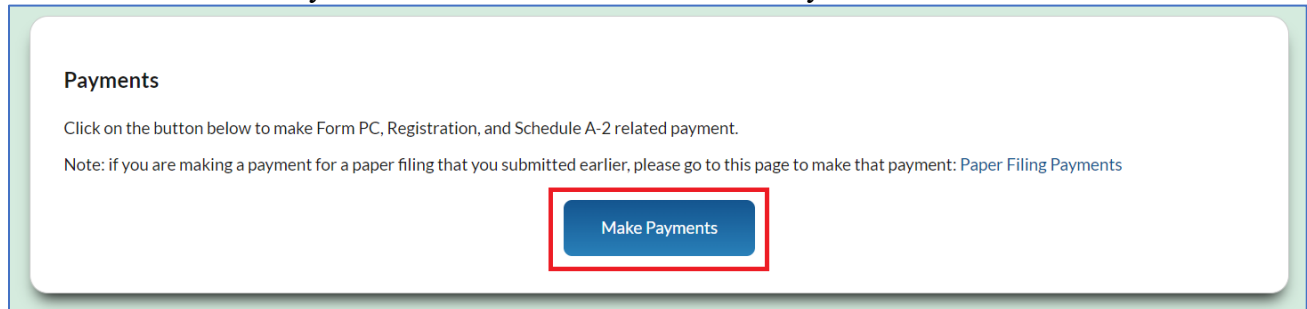
Accepted

Need Corrections

How to Submit a Payment for a Charity’s Registration/Annual Form PC Filing/Schedule A2

Note: when completing a Form PC or Schedule A2, you must make a payment before the AGO can review the charity's filing. You will receive an email notifying you that the filing has been approved by all signatories and is pending payment before official submission. For the registration, you are not required to make a payment until after the AGO's review.

1. Navigate to the Portal and sign in.
2. Scroll to the 'Payments' section and click on 'Make Payments.'



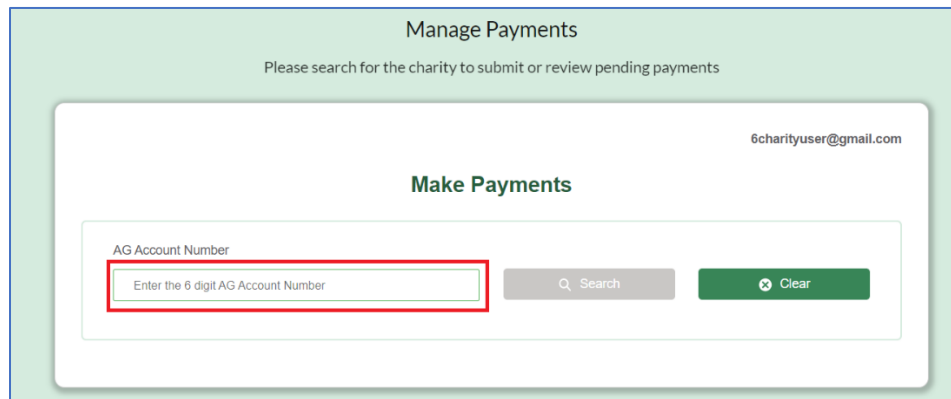
Payments

Click on the button below to make Form PC, Registration, and Schedule A-2 related payment.

Note: if you are making a payment for a paper filing that you submitted earlier, please go to this page to make that payment: [Paper Filing Payments](#)

[Make Payments](#)

3. Type in the AG Account Number for the charity for which you would like to make a payment.



Manage Payments

Please search for the charity to submit or review pending payments

6charityuser@gmail.com

Make Payments

AG Account Number

Enter the 6 digit AG Account Number

Search

Clear

4. If any payments are owed, they will be shown under 'List of Pending Payments.' This will include Form PC, Schedule A2, and Registration fees.

AG Account Number

Test Charity 999 PP

AG Account Number	Tax ID	Type
068134	00-0000009	Corporation

List of pending payments

Fee For	Fee Amount	Filing Year	
Form-PC	\$35.00	2022	<input type="button" value="Pay"/>

5. Click on the 'Pay' button, and you will be redirected to the payment processing site.

List of pending payments

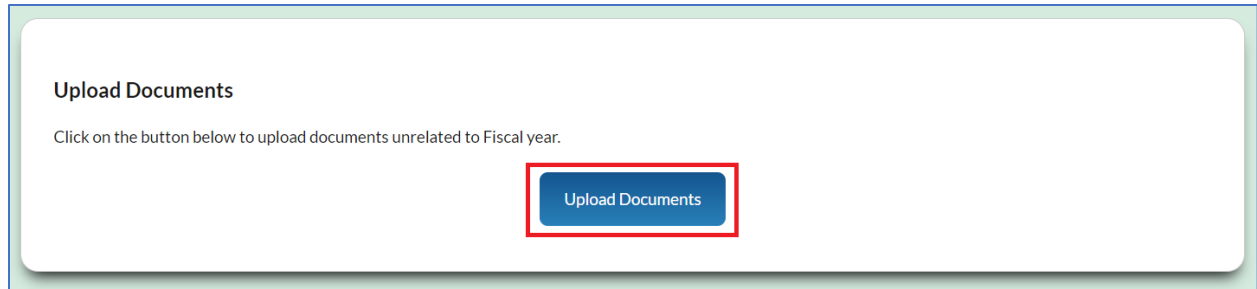
Fee For	Fee Amount	Filing Year	
Form-PC	\$35.00	2022	<input style="border: 2px solid red;" type="button" value="Pay"/>

6. Fill out the billing and card information. Double check to ensure accuracy and click 'Submit Payment.'
7. You will receive an electronic receipt from payment processor nCourt to confirm that the payment was submitted. If this is a Form PC/Schedule A2 payment, you will also be notified by the AGO that the charity's filing was submitted successfully.

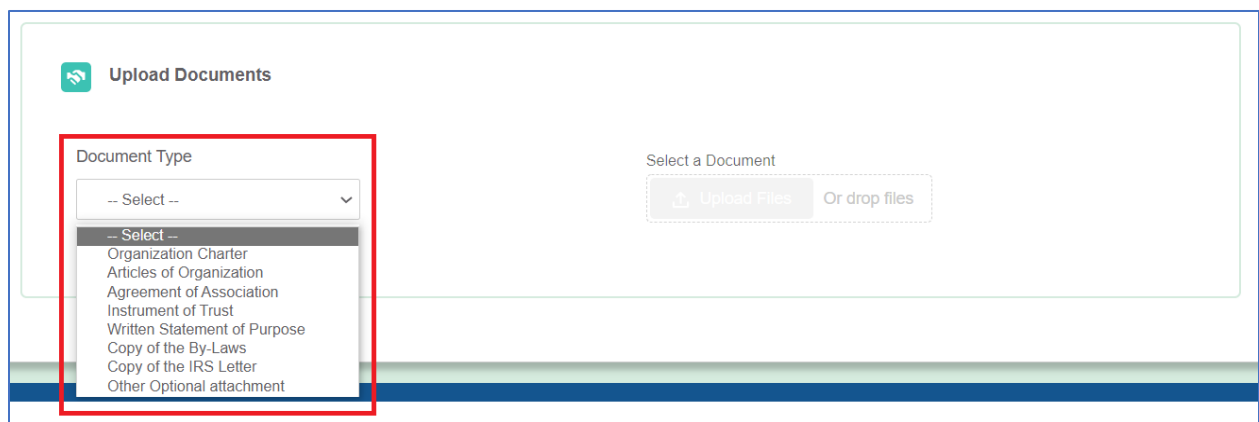
How to Submit Charity-Related Documents

Note: The Initial Charity Registration Form and Annual PC Filing will require you to attach some documents within the forms. This additional Upload Documents feature applies to the instances where you need to submit a charity document to the AGO, but you are not submitting an Annual Filing at that time (e.g., updated by-laws, instrument of trust, articles of organization).

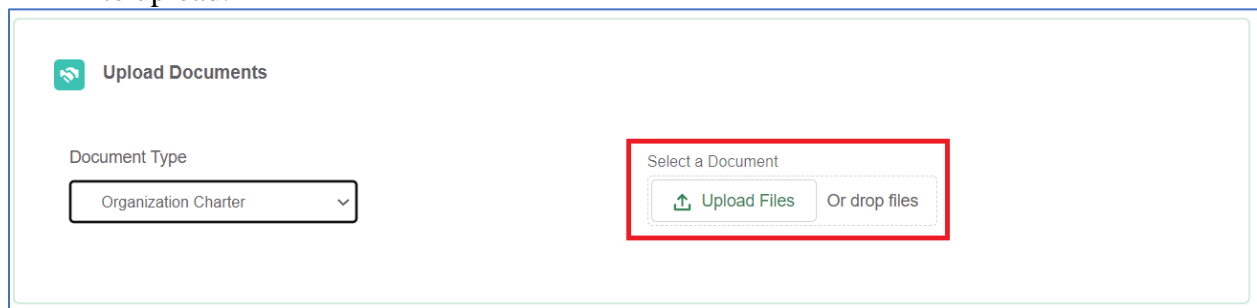
1. Navigate to the Portal and sign in.
2. Scroll down to the Upload Documents section and click on 'Upload Documents.'



3. Enter the Attorney General Account Number you wish to upload documents for.
4. Select the document type from the dropdown. If none apply to the document, please select 'Other Optional Attachment.'






5. Use the 'Upload Files' button to select the document from your files that you are looking to upload.



6. Once your file has uploaded, you will see this popup. Press 'Done' and your file will be successfully submitted, as noted by the message.

Upload Files

PDF TEST Document.pdf 6 KB  

1 of 1 file uploaded 

Upload Documents

Document Type:

Select a Document: Or drop files

Your file(s) have been uploaded successfully.
Organization Charter.pdf [TEST Document.pdf (6.24 KB)]