

Q1: Does it matter which email I use to sign up for the Portal?

A1: Yes! 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.

Q2: Can I use a shared email account to sign up for the Portal?

A2: No. Our system is not designed for a shared account. Each user should use their own email address associated with their name when they set up an account.

Q3: Help! I created an account on the Portal and then checked my email to confirm the account, but I haven't received an email in my inbox. What do I do next?

A3: Please check your spam/junk folder and contact your IT Department to ensure that emails from Salesforce are not being blocked.

Q4: What are filers able to submit through the Online Charities Portal?

A4: Filers are currently able to (1) fill out and submit forms and supporting documentation to register a charity (initial registration); (2) fill out and submit forms and attachments to comply with annual charities filing obligations (annual filings/renewals); (3) submit required fees for initial registration and annual filings/renewals; and (4) submit other documents required by statute, such as updated bylaws and articles of organization. The Online Charities Portal does not currently accept fundraiser filings.

Q5: Can I save and continue my work on an annual filing/renewal at a later time?

A5: Yes! Each filer will set up an individual account and you can "save and continue" work on any annual filing you have started. Currently, new registration forms (which require much less information) do not have a "save and continue" option.

Q6: Will I be able to share a draft of the annual filing I am working on with charity representatives or members of my firm?

A6: Yes! Once you log onto your own account, you can see a list of annual filings that are currently "in progress" and will be able to view a copy of that draft and share it with others by printing or saving to PDF. Accounts are user-specific, and users should not share a single account. The specific steps are outlined in the Portal Instructions on the Annual Charities Filings page on mass.gov.

Q7: Will I be able to collect signatures for my forms electronically?

A7: Yes! Signatories will receive an email with a link to the form and information on how to sign. This process will start once your form is complete and you click "Submit" under the Form Submission tab. Final submission to the AGO will occur after all signatories/reviewers have approved the filing and the payment is made (if applicable).

Q8: Can I submit annual charities filings for prior fiscal years?

A8: Yes! You can submit annual filings for any of the last five fiscal years (2018 through 2022).

Q9: How will charities receive compliance letters and Certificates of Solicitation in response to filings submitted electronically?

A9: For any form submitted through the Portal and the initial Registration eForm, all AGO communications will happen via email. Emails will be sent to both the filer and the charity contact email address provided. Any correspondence related to previously submitted paper filings will continue to be sent out in paper form.

Q10: I read the eFiler instructions, do I really submit an initial Registration eForm without setting up an account?

A10: Yes! The initial Registration eForm is a short form that requires limited attachments. After review, the AGO will follow up via email with next steps, including the charity's Attorney General Account Number which the charity will need to submit required fees and additional forms and documents through the Portal.

Q11: Does a charity that has previously registered with the AGO need to "register" in the Portal before submitting annual filing PCs and attachments?

A11: No, registration refers to the initial registration for a charity that has not yet registered with the AGO and does not yet have an Attorney General Account Number. Use our public search page if you are trying to find a charity's Attorney General Account Number:
<https://masscharities.my.site.com/FilingSearch/s/>.

Q12: What can I do if I am having problems either creating an account, logging into the Portal or forgot my Password?

A12: If you are having problems creating an account or logging into to the Portal, you may already have an account set up or have forgotten your Password. You can request a Password reset here: <https://masscharities.my.site.com/CharityPortal/s/login/ForgotPassword>.