

Online Renewal System Checklist

The online session must be conducted by an agent authorized to sign on behalf of the organization.

- Charity Registration Status must be [Current](#) or [Current – Awaiting Reporting](#). Use the [Registry Verification Search tool](#) to verify status, look up previous and in-progress filings.
- IRS filing for the most recent full accounting period must have been submitted to the IRS. The Registry requires a copy of IRS Forms 990, 990-EZ or 990-PF including most schedules and attachments in PDF format. Note:
 - Schedule B is not required. **Please exclude Schedule B** from your IRS Form 990, Form 990-EZ or Form 990-PF filing.
 - If your organization is not required to file and does not file IRS Form 990 or 990-EZ because it does not meet the revenue requirements, your organization must submit [Form CT-TR-1](#) with the Registry (more details below).
 - The Registry does not require a copy of IRS Form 990-N.
- All data as required on [Form RRF-1 & Instructions](#). You will not need to upload the PDF itself.
- Written explanations to all "Yes" answers to Questions 1 through 7 and 9 in Part B of [Form RRF-1 & Instructions](#) are required in a separate PDF file. Question 8 is exempted unless the Registry specifically requests an explanation later. See [Tip: Creating a PDF File](#).
- If your organization is not required to file and does not file IRS Form 990 or 990-EZ with the IRS because it does not meet the revenue requirements, your organization must submit [Form CT-TR-1 & Instructions](#) in PDF format. The Registry does not require Form CT-TR-1 from organizations that file Form 990, 990-EZ or 990-PF. Suggested steps to make Form CT-TR-1 ready for upload:
 - Complete the form fields per instructions, typing directly into the fields.
 - The TOTALs fields are not editable - they are calculated based on what is entered in the fields above them. You may need the latest version of [Acrobat](#) for this feature.
 - The *Signature of Authorized Agent* field may be left blank when the form is submitted using the Online Renewal System. Your electronic signature that will be captured during your online session will constitute a signature on all attachments you upload to the system. Only an agent authorized to sign on behalf of the organization may sign during your online session.
 - For all PDFs you intend to submit, please be sure that they look as expected when opening with the latest version of [Acrobat](#). Some third party PDF creators are not fully compatible with Acrobat.
- Do not include public and confidential documentation in the same PDF.** Have ready a separate PDF file for all **confidential** portions of your filing. Note:
 - Schedule B is not required. Please exclude Schedule B from your IRS Form 990, Form 990-EZ or Form 990-PF filing.
- All individual files to be submitted must:
 - Be 100% public or 100% confidential documentation. See previous bullet item.
 - Be in PDF format. See [Tip: Creating a PDF File](#).
 - Be fully viewable with the latest version of [Acrobat](#). Some third-party PDF creators are not fully compatible. Please check by opening each PDF with Acrobat before attaching them.
 - Be no more than 6 MB each. See Tip: [Reducing PDF File Size](#).
 - Not be password protected. They will be deleted.
- As of January 1, 2022, there is a Renewal Fee required from all organizations regardless of total revenue. The Fee Schedule is on the first page of [Form RRF-1 & Instructions](#). It must be paid online using a checking

account (ACH) at the time of online submission. You will need your banking information including account and routing (ABA) numbers.

- **Note:** For those with ACH/debit blocks on their checking account, before submitting you must notify your bank to allow an ACH debit. The Registry/DOJ Company ID is 1082037180.

- ***All required documents and payments must be submitted together at the same time.*** An incomplete renewal submission will result in a Registry Status of [Current - Reporting Incomplete](#) until all remaining, required documents are received by U.S. Mail or email. You may not amend or update a submission using this system.

If all of the above are done, you are ready to [submit your filing](#).

If you do not already have a User ID & Password established, see [User ID & Password](#).

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