Overview

Users will access the state portal to submit their charity renewal application. The uPerform tutorials are divided in 3 parts. This document covers all parts. If you would like to view the tutorials, we provide you the links for each one:

BCO - 10 Renewal Part 1
BCO - 10 Renewal Part 2
BCO - 10 Renewal Part 3

Trigger

Charities can submit their renewal application online prior to their expiration date.

Prerequisites

- User must have the following:
  - Keystone Account (user and password),
  - valid credit card to use for payment,
  - valid email address,
  - financial documents already available in an electronic to upload them to our system, and
  - access to IRS 990 information
- If user does not have an IRS form 990, users can provide the PA BCO-23 form which can be located on our website

Menu Path

Use the following menu path(s) to begin this transaction:

- Please go to: https://www.charities.pa.gov/#/page/default
- Use your Keystone credentials to login the system
- Follow the instructions for renewal application

Helpful Hints

- Familiarize yourself with:
  - Our PA BCO-10 form
  - Solicitation of Funds for Charitable Purposes Act (10 P.S. § 162.1 et seq.) (Act 202 of 1990) and,
PROCEDURE

1. Start the transaction directing your browser to our charities webpage: https://www.charities.pa.gov/#/page/default.

2. To log in the system, select Login icon.
3. Select User ID text box

4. As required, complete/review the following fields:
### Field | R/O/C | Description
--- | --- | ---
Sign In for Existing Applicants & Registration | Required | Example: jcpena

5. Select Password text box. 

![Password selection](image-url)
6. As required, complete/review the following fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>R/O/C</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>User ID</td>
<td>Required</td>
<td>Example: *****</td>
</tr>
</tbody>
</table>
7. Select Login button.

8. Select the renew application icon.
9. Select the drop down icon.

10. Select the correct category for your organization: Charitable Organizations.

- Institution of Purely Public Charities
- Non-Renewal of Charitable Registration Statement (BCO-2)
11. Select the Ok icon.

12. Select the Fiscal year ended field with the format MM/dd/yyyy.
13. As required, input the fiscal year ended in the required field:

<table>
<thead>
<tr>
<th>Field</th>
<th>R/O/C</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Required</td>
<td></td>
<td>Example: 12/31/2019</td>
</tr>
</tbody>
</table>
14. Select control

15. Select the correct radio button
   - Enter
   - Upload
   - Not Applicable
16. If you selected "Upload" click on the "Browse" button.
17. As required, complete/review the following fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>R/O/C</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Required</td>
<td>Example: CHR26664</td>
</tr>
</tbody>
</table>
18. To complete the upload process, please select the Upload button.

19. Select the correct radio button for your organization.
20. Select the correct radio button for your organization Yes ☐ No ☐
21. Select the correct radio button for your organization  

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
</table>

22. Select the Save And Continue button
23. Click in the text box and write your response for question 7.
24. Click in the text box and write your response to question 8.
25. Select the correct radio button for your organization

26. Select the correct radio button for your organization
27. Select the correct radio button for your organization  

Yes ☐  No ☐
28. Select the correct radio button for your organization  

29. As required, complete/review the following fields:
### Field | R/O/C | Description
--- | --- | ---
Name | Required | **Example:** JCP Enterprises

#### 30. As required, complete/review the following fields:

**Field**

- **Name**
- **Phone Number**
31. As required, complete/review the following fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>R/O/C</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address 1</td>
<td>Required</td>
<td>Example: 401 North Street</td>
</tr>
</tbody>
</table>
32. As required, complete/review the following fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>R/O/C</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address 2</td>
<td>Required</td>
<td>Example: Suite 207</td>
</tr>
</tbody>
</table>
33. As required, complete/review the following fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>R/O/C</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>City</td>
<td>Required</td>
<td>Example: Harrisburg</td>
</tr>
</tbody>
</table>
Select the drop down icon.
35. Select the correct state from list. Pennsylvania.

- Illinois
- Indiana
- Iowa
- Kansas
- Kentucky
- Louisiana
- Maine
- Maryland
- Massachusetts
- Michigan
- Minnesota
- Mississippi
- Missouri
- Montana
- Nebraska
- Nevada
- New Hampshire
- New Jersey
- New Mexico
- New York
- North Carolina
- North Dakota
- Ohio
- Oklahoma
- Oregon
- Pennsylvania
- Puerto Rico
- Rhode Island
- South Carolina
- South Dakota
36. As required, complete/review the zip code field:

<table>
<thead>
<tr>
<th>Field</th>
<th>R/O/C</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Zip Code</td>
<td>Required</td>
<td>Example: 17120</td>
</tr>
</tbody>
</table>
37. Select the drop down icon.
38. Select the county from list Dauphin.
As required, complete/review the following fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>R/O/C</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date From</td>
<td>Required</td>
<td>Example: 01/01/2019</td>
</tr>
</tbody>
</table>
40. As required, complete/review the following fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>R/O/C</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date To</td>
<td>Required</td>
<td>Example: 06/30/2019</td>
</tr>
</tbody>
</table>
41. If you need to add another fundraising counsel, select the add icon +Add.

42. Select the correct radio button for your organization ○ Yes ○ No.
43. Select Save And Continue button.
44. Select the correct radio button for your organization

- Enter
- Upload
- Not Applicable
45. Select the correct radio button for your organization

- Enter
- Upload
- Not Applicable
46. Select the correct radio button for your answer

- Enter
- Upload
47. Select the Browse... button

48. Double click or select and open the correct file to upload it. Choose File to Upload
49. To complete the upload process, select the Upload button ➔ Upload.
50. Select Save And Continue button
PROCEDURE

51. Start the transaction using the menu path or transaction code.

52. Select radio button of your preference

- Enter
- Upload
53. As required, complete/review the following fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>R/O/C</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
<td>Required</td>
<td><strong>Example:</strong> Mathew</td>
</tr>
</tbody>
</table>
### Field | R/O/C | Description
--- | --- | ---
Last Name | Required | **Example:** Parker
55. Select radio button of your preference

- Enter
- Upload
56. As required, complete/review the following fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>R/O/C</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
<td>Required</td>
<td>Example: Edward</td>
</tr>
</tbody>
</table>
57. As required, complete/review the following fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>R/O/C</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Name</td>
<td>Required</td>
<td>Example: Pacini</td>
</tr>
</tbody>
</table>
58. Select radio button of your preference

- Enter
- Upload
59. As required, complete/review the following fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>R/O/C</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
<td>Required</td>
<td>Example: Mathew</td>
</tr>
</tbody>
</table>

*Please provide the first name of the individual.*
60. As required, complete/review the following fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>R/O/C</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Name</td>
<td>Required</td>
<td>Example: Parker</td>
</tr>
</tbody>
</table>
61. Select radio button of your preference

62. As required, complete/review the following fields:
63. As required, complete/review the following fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>R/O/C</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Name</td>
<td>Required</td>
<td>Example: Pacini</td>
</tr>
</tbody>
</table>
64. Select the correct radio button

- [ ] Enter
- [ ] Upload
- [ ] Not Applicable
65. Select the correct radio button

- Enter
- Upload
- Not Applicable
66. Select the radio button

- Enter
- Upload
- Not Applicable
67. Select the correct radio button ☐ Yes ☐ No .

68. Select the correct radio button ☐ Yes ☐ No .
Select Save And Continue button.
70. Select the correct radio button  
- IRS 990
- Other (IRS 990EZ/990N/990PF)
- No

71. Select the Browse... button

![Image of the BCO-10 Renewal Part II user interface](image-url)
Double-click or click and open the file to be attached `IRS 990 2018`. 
73. To complete the upload process, select Upload button.
74. Select the Federated campaigns text box and insert the amount...
Select the Royalties text box and insert the amount.
76. Select the Gross income from fundraising events text box and insert the amount.
77. Select the Net income or (loss) from sales of inventory text box and insert the amount
78. Select the Gross rents-Real text box and insert the amount
79. As required, complete/review the following fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>R/O/C</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ii.) Other</td>
<td>Required</td>
<td>Example: 0</td>
</tr>
</tbody>
</table>
### Work Instruction

**BCO-10 Renewal Part II**

---

#### 80. Select the Other revenue text box and insert the amount

<table>
<thead>
<tr>
<th>Item</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Revenue from functions (including $)</td>
<td>$2,000</td>
</tr>
<tr>
<td>Less direct expenses</td>
<td>$200</td>
</tr>
<tr>
<td>Net income from functions</td>
<td>$1,800</td>
</tr>
<tr>
<td>Revenue from gains and losses</td>
<td>$1,000</td>
</tr>
<tr>
<td>Less direct expenses</td>
<td>$1,000</td>
</tr>
<tr>
<td>Net income from gains and losses</td>
<td>$1,000</td>
</tr>
<tr>
<td>Sale of non-current assets and allowances</td>
<td>$1,000</td>
</tr>
<tr>
<td>Revenue before extraordinary items</td>
<td>$1,000</td>
</tr>
</tbody>
</table>

---

**Financial Statements**

- Please submit these reports with complete revenue and expenses statements based on the prior year's financial statements.

---

**Opportunity**

- Complete the form as per the instructions.

---

Last published: 3/11/2020

BCO-10 Renewal Part II.udc 27/31
81. As required, complete/review the following fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>R/O/C</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>End of Year</td>
<td>Required</td>
<td><strong>Example:</strong> 394306</td>
</tr>
</tbody>
</table>
82. If applies to your organization, select the Browse... button to attach the financial statements.

Choose File to Upload
83. Double-click or select and open the correct file `END OF YEAR FINANCIAL STATEMENTS`.

84. To complete the upload process, select Upload button.
85. Select the correct option for your situation  
- Charity
- Third Party Filer
86. Read the statement before clicking on the signature check box.

87. The user must click on check box "I verify that I have electronically signed" and read the statement below.
88. **As required, complete the *Please type your name* fields:**

<table>
<thead>
<tr>
<th>Field</th>
<th>R/O/C</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Signature</td>
<td>Required</td>
<td><strong>Example:</strong> Michael D. Johnson</td>
</tr>
</tbody>
</table>
89. The user must click on check box □ “I verify that I have electronically signed and submitted

90. As required, complete/review the following fields:
<table>
<thead>
<tr>
<th>Field</th>
<th>R/O/C</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Signature</td>
<td>Required</td>
<td>Example: Angela DiMaggio</td>
</tr>
</tbody>
</table>

91. Select Save And Continue button.

SaveAnd Continue
92. Select Add to Cart button. Add to Cart.

93. As required, complete the check box to proceed to check out:
94. Select the Proceed to Payment button.
95. As required, complete card name fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>R/O/C</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cardholder Name</td>
<td>Required</td>
<td>Example: Mathew Parker</td>
</tr>
</tbody>
</table>
96. As required, complete credit card number field:

<table>
<thead>
<tr>
<th>Field</th>
<th>R/O/C</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Credit Card Number</td>
<td>Required</td>
<td>Example: 4111111111111111</td>
</tr>
</tbody>
</table>
97. As required, complete expiration date field:

<table>
<thead>
<tr>
<th>Field</th>
<th>R/O/C</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expiry Date (MMYY)</td>
<td>Required</td>
<td>Example: 1022</td>
</tr>
</tbody>
</table>
As required, complete security code field:

<table>
<thead>
<tr>
<th>Field</th>
<th>R/O/C</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Security Code</td>
<td>Required</td>
<td>Example: 1234</td>
</tr>
</tbody>
</table>
99. As required, complete/review the following fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>R/O/C</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email</td>
<td>Required</td>
<td>Example: <a href="mailto:mparker40@hsfgcpa.org">mparker40@hsfgcpa.org</a></td>
</tr>
</tbody>
</table>
100. Select Pay With Your Credit Card button and Pay With Your Credit Card.
101. You will see a payment confirmation screen.

Thank you for your payment.

102. To navigate to your dashboard select the Go to Dashboard button.
103. Once you submitted the application you will be able to see it on your dashboard with an Application Number assigned to it.
104. You can log out of the system by selecting the human icon.

105. To logout select Logout icon.