

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),
- o valid credit card to use for payment,
- valid email address.
- financial documents already available in an electronic to upload them to our system, and
- o access to IRS 990 information
- If user does not have an IRS form 990, users can provide the <u>PA BCO-23</u> 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

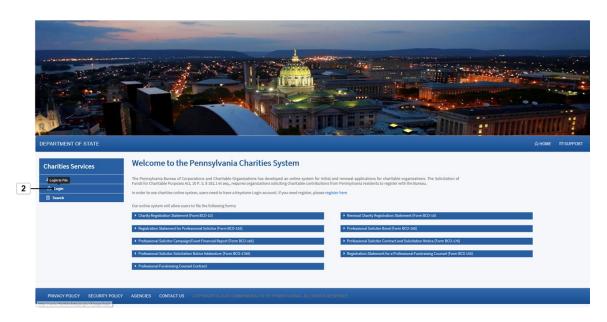
Helpful Hints

- 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,
- BCO-10 Instructions: https://www.dos.pa.gov/BusinessCharities/Charities/Resources/Documents/BCO-10%20final%20instructions%201-2018.pdf



PROCEDURE

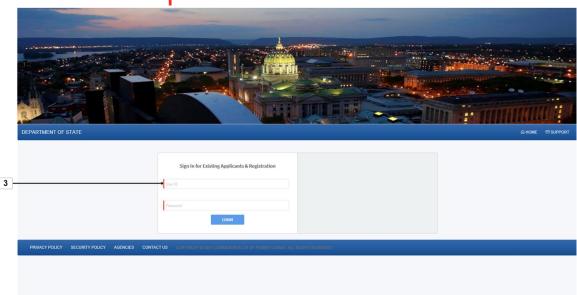
1. Start the transaction directing your browser to our charities webpage: https://www.charities.pa.gov/#/page/default.

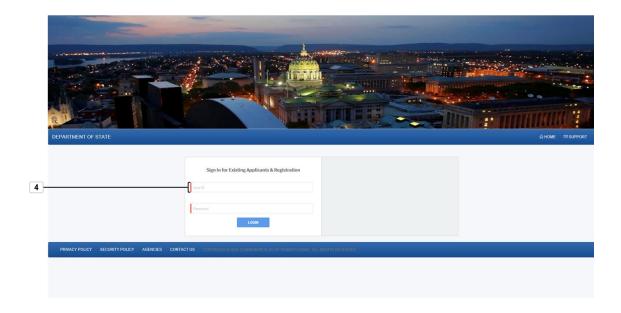


2. To log in the system, select Login icon Login.



3. Select User ID text box User ID



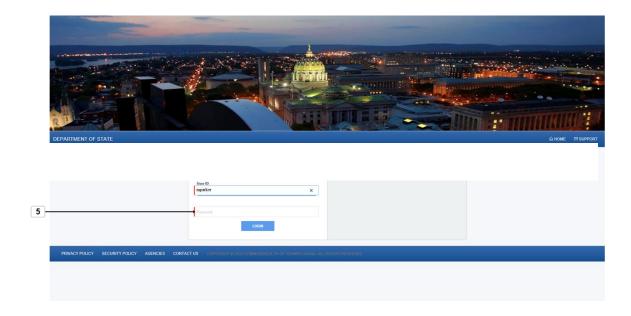




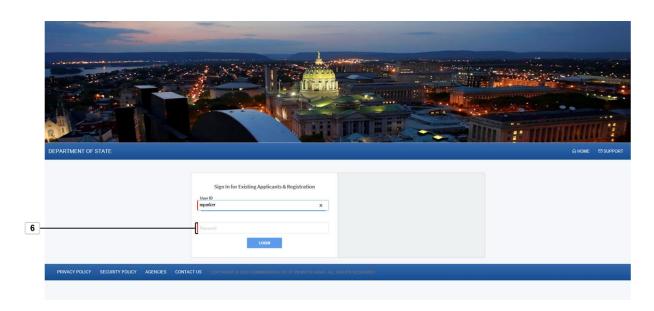
Field	R/O/C	Description
Sign In for Existing Applicants & Registration	Required	Example: jcpena

5. Select Password text box

Password





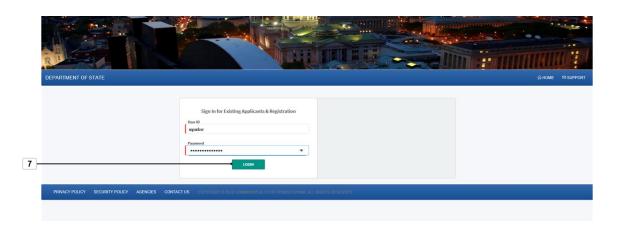


Field	R/O/C	Description
User ID	Required	Example: *****

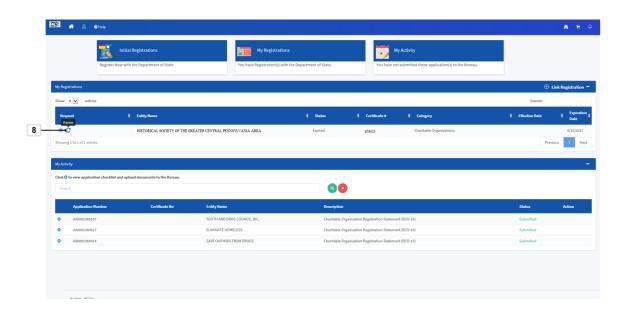


7. Select Login button

LOGIN

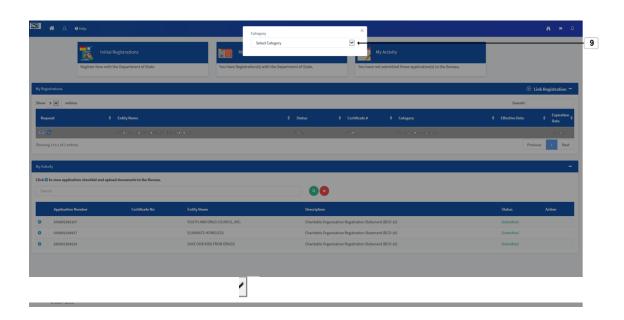


8. Select the renew application icon





9. Select the drop down icon

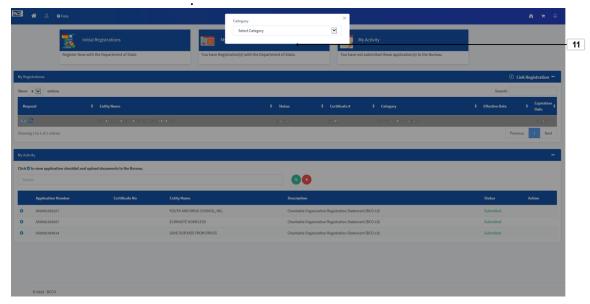


10. Select the correct category for your organization Charitable Organizations .

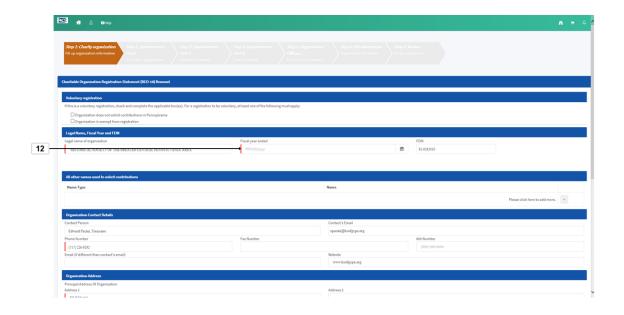




11. Select the Ok icon

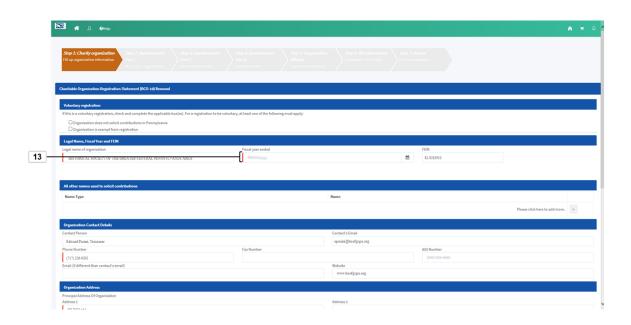


12. Select the Fiscal year ended field MM/dd/yyyy





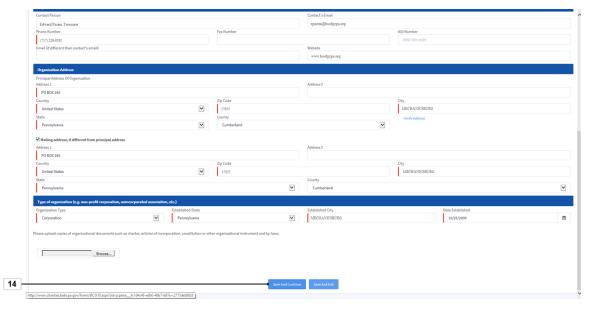
13. As required, input the fiscal year ended in the required field:



Field	R/O/C	Description
	Required	Example: 12/31/2019

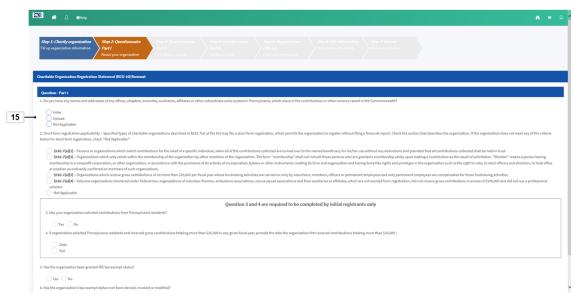


14. Select control Save And Continue



15. Select the correct radio button



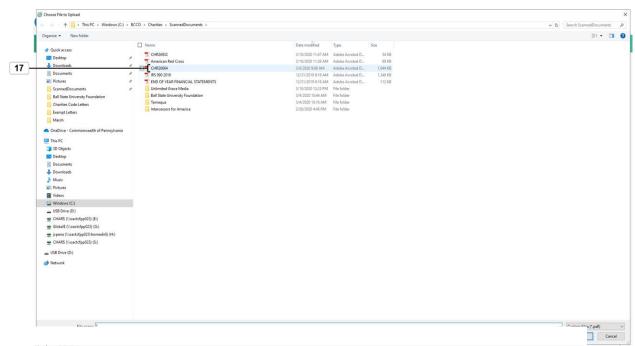




16. If you selected "Upload" click on the "Browse" button Browse...



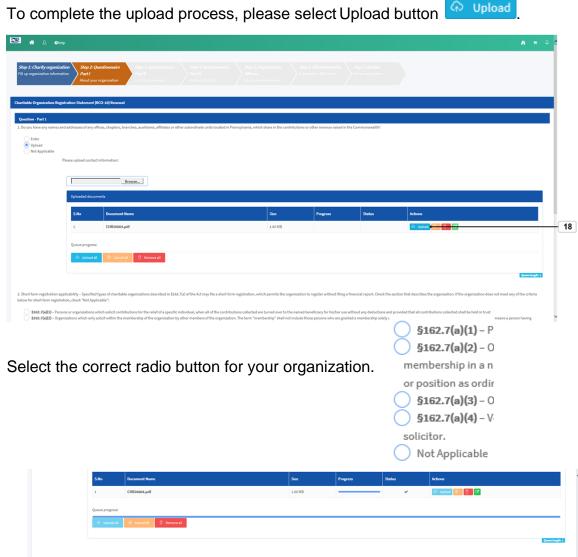


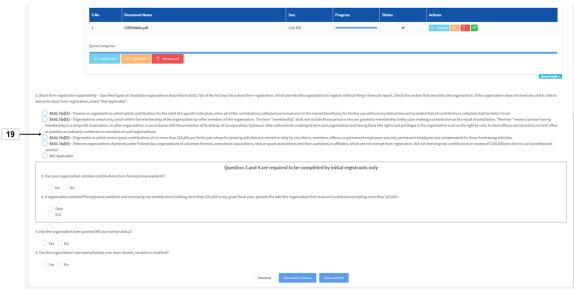


Field	R/O/C	Description
Name	Required	Example: CHR26664



To complete the upload process, please select Upload button 18.

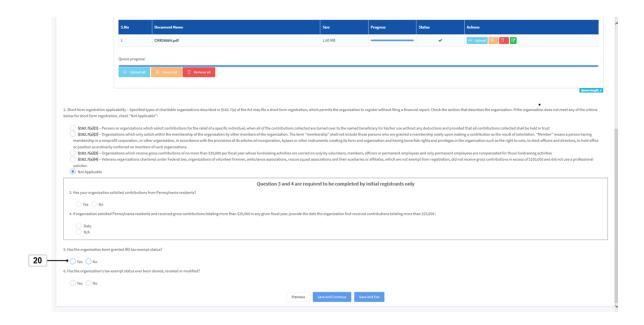




19.

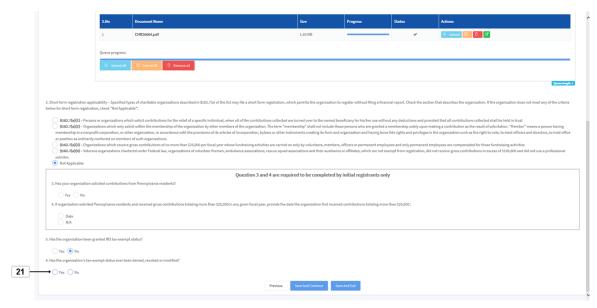


20. Select the correct radio button for your organization \bigcirc Yes \bigcirc No

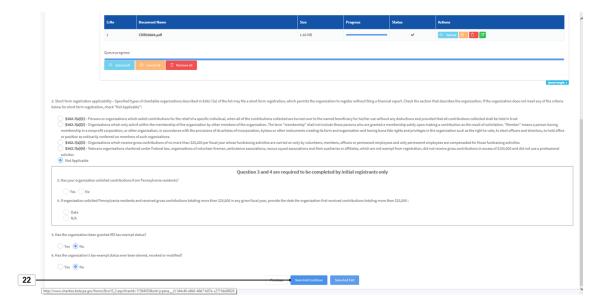




21. Select the correct radio button for your organization Ves No

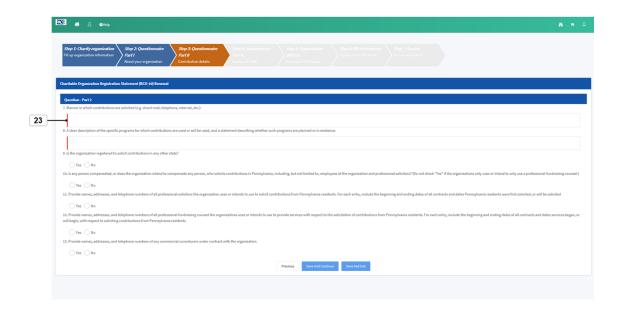


22. Select the Save And Continue button Save And Continue



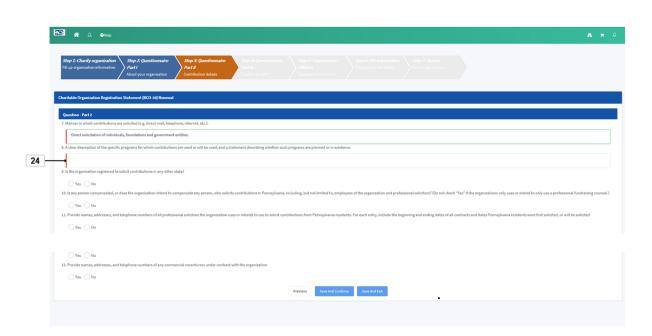


23. Click in the text box and write your response for question 7.



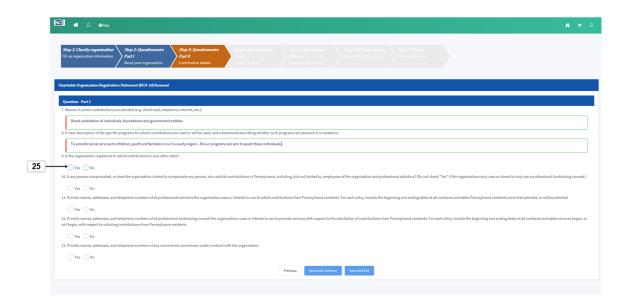


24. Click in the text box and write your response to question 8.

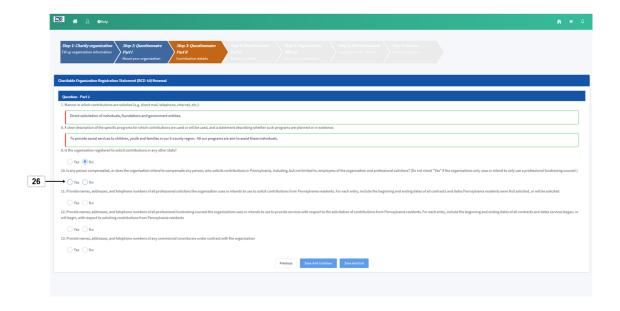




25. Select the correct radio button for your organization \bigcirc Yes \bigcirc No .

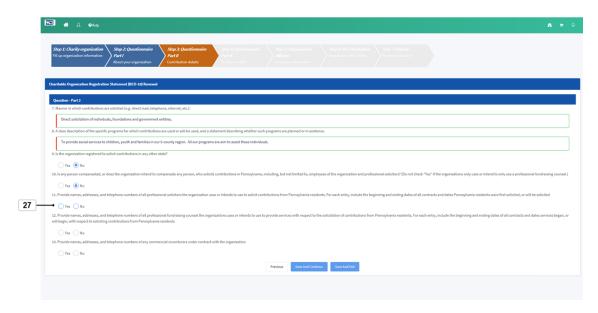


26. Select the correct radio button for your organization \bigcirc Yes \bigcirc No



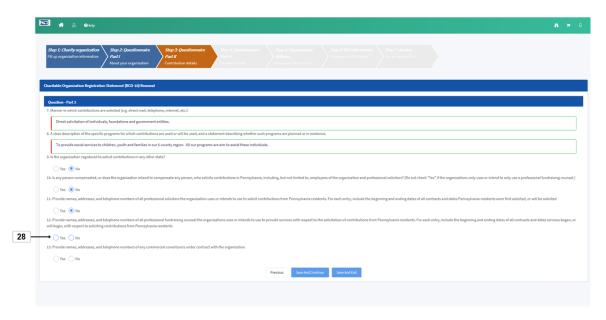


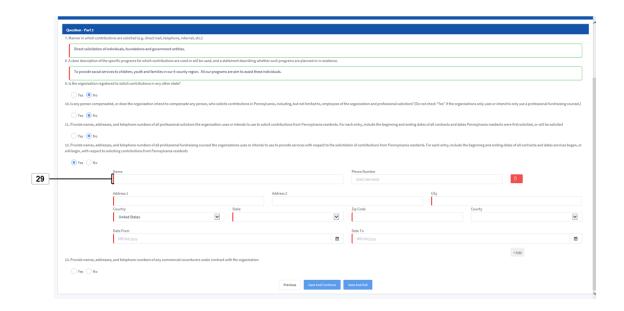
27. Select the correct radio button for your organization Yes (





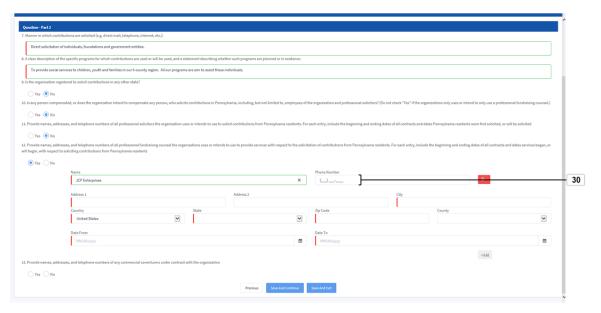
28. Select the correct radio button for your organization \bigcirc Yes \bigcirc No





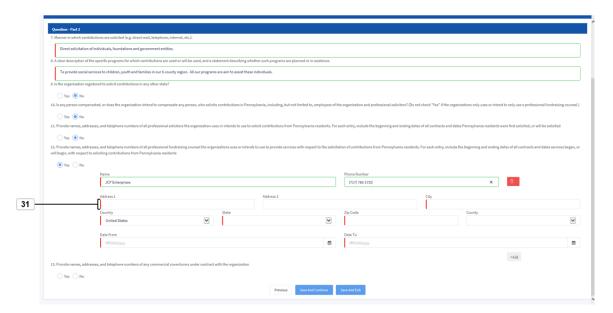


Field	R/O/C	Description
Name	Required	Example: JCP Enterprises



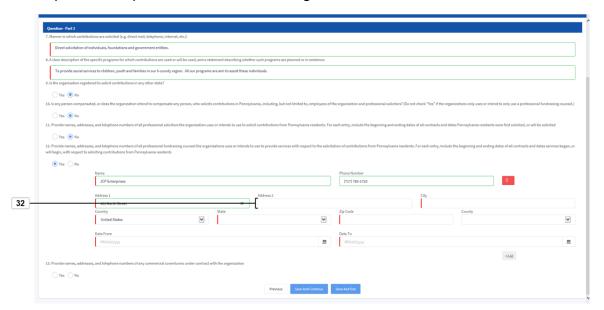
Field	R/O/C	Description
Phone Number	Required	Example: (717) 783-1720





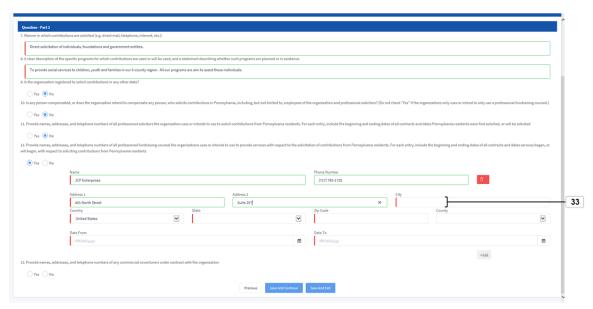
Field	R/O/C	Description
Address 1	Required	Example: 401 North Street





Field	R/O/C	Description
Address 2	Required	Example: Suite 207

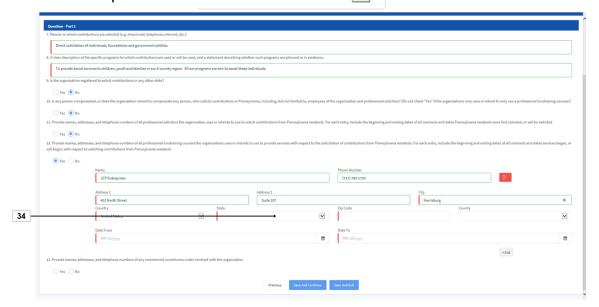




Field	R/O/C	Description
City	Required	Example: Harrisburg



34. Select the drop down icon

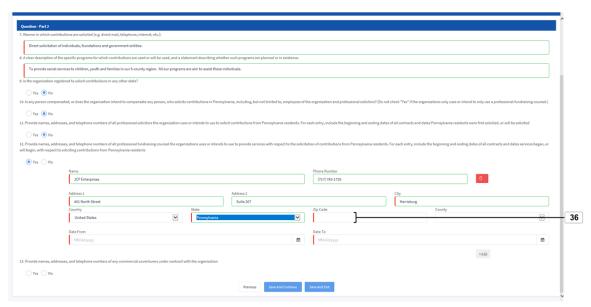




Pennsylvania 35. Select the correct state from list Illinois Indiana lowa Kansas Kentucky Louisiana Maine Maryland Massachusetts Michigan Minnesota Mississippi Missouri Montana Nebraska Nevada New Hampshire New Jersey New Mexico New York North Carolina North Dakota Ohio Oklahoma Oregon Pennsylvania 35 Puerto Rico Rhode Island South Carolina South Dakota



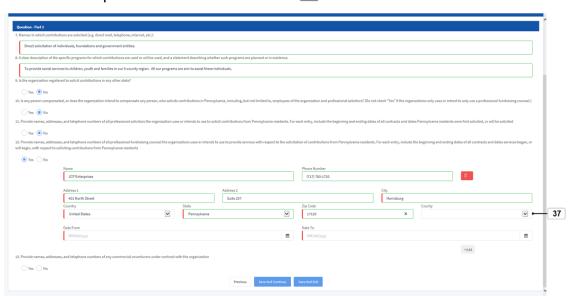
36. As required, complete/review the zip code field:



Field	R/O/C	Description
Zip Code	Required	Example: 17120

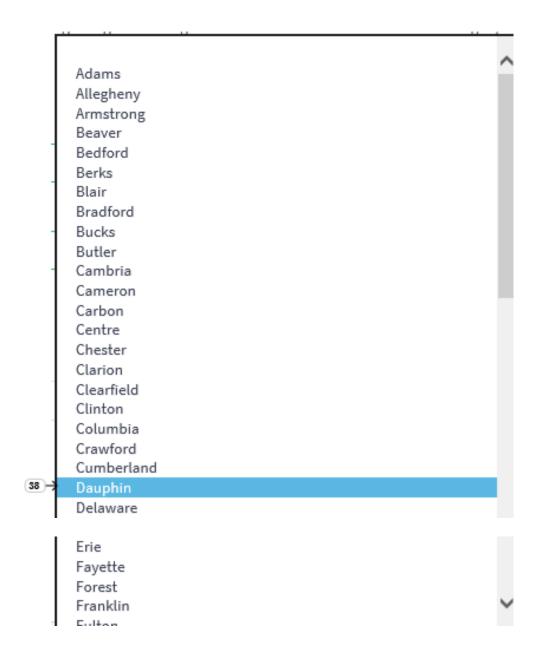


37. Select the drop down icon

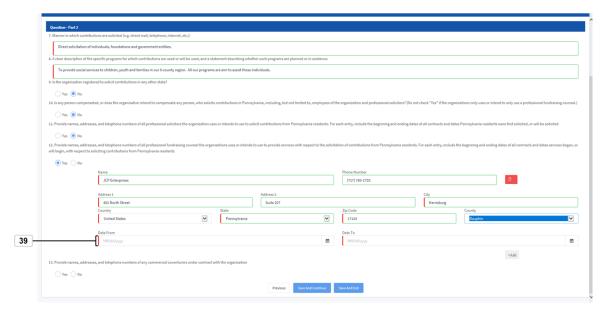




38. Select the county from list Dauphin

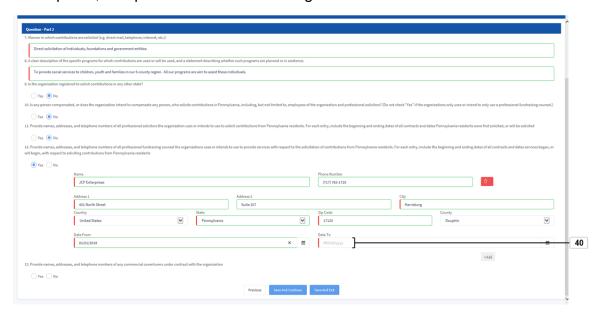






Field	R/O/C	Description
Date From	Required	Example: 01/01/2019

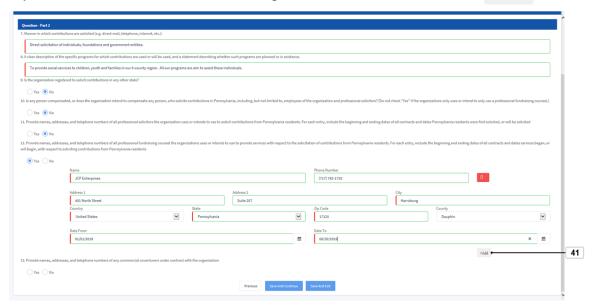




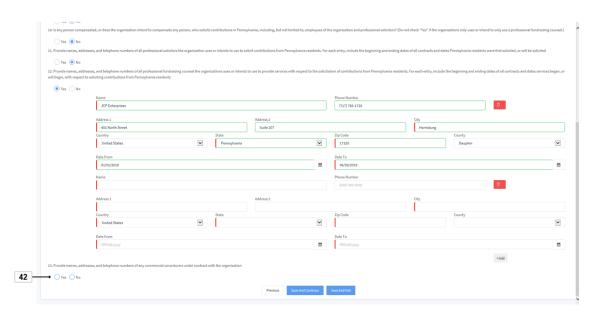
Field	R/O/C	Description
Date To	Required	Example: 06/30/2019



41. If you need to add another fundraising counsel, select the add icon +Add.



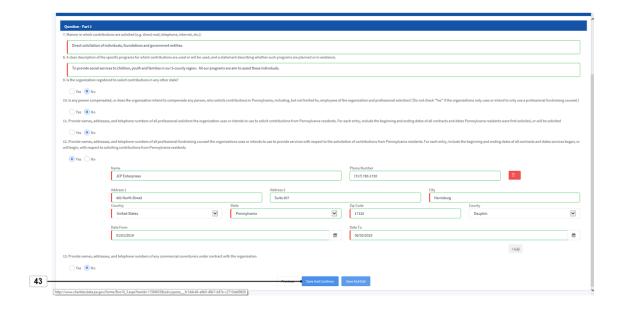
42. Select the correct radio button for your organization \bigcirc Yes \bigcirc No



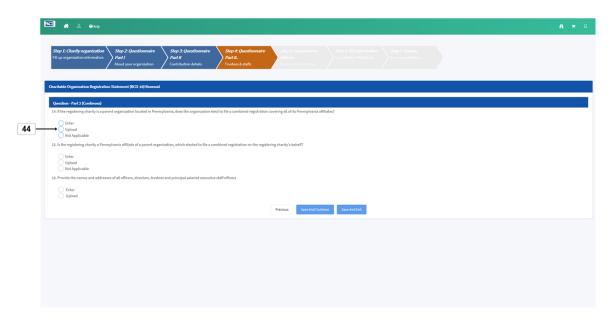


43. Select Save And Continue button

Save And Continue



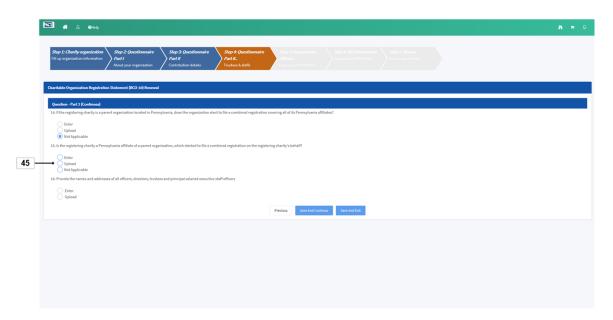




44. Select the correct radio button for your organization

\bigcirc	Enter
\bigcirc	Upload
\bigcirc	Not Applicable

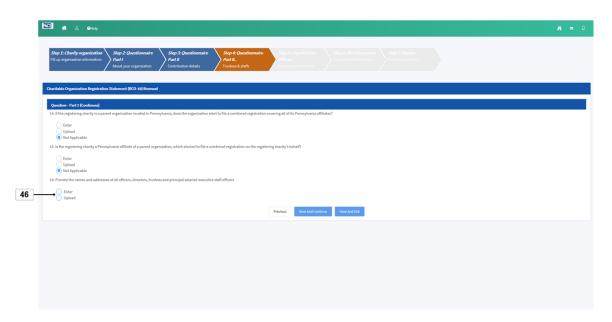




45. Select the correct radio button for your organization

\bigcirc	Enter
\bigcirc	Upload
\bigcirc	Not Applicable



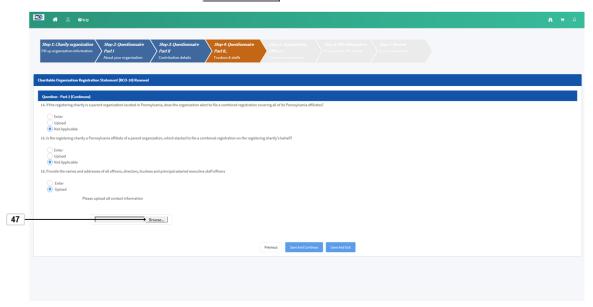


46. Select the correct radio button for your answer

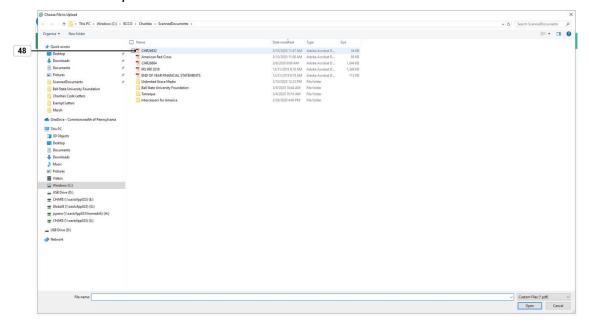
0	Enter
\bigcirc	Upload



47. Select the Browse... button Browse...

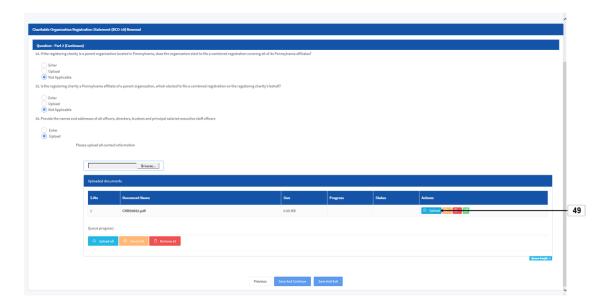


48. Double click or select and open the correct file to upload it. **Characteristic** Characteristic Characteristic Characteristic Characteristic Characteristic Characteristic Characteristics Characteristic

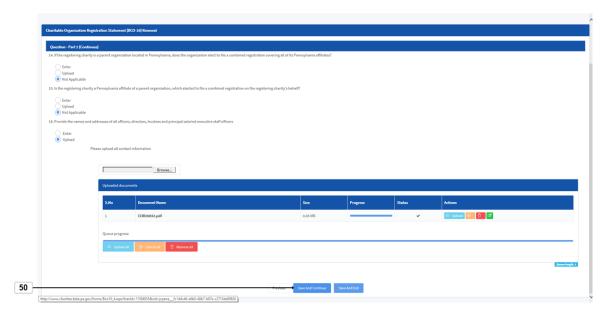




49. To complete the upload process, select the Upload button Opload







50. Select Save And Continue button Save And Continue



PROCEDURE

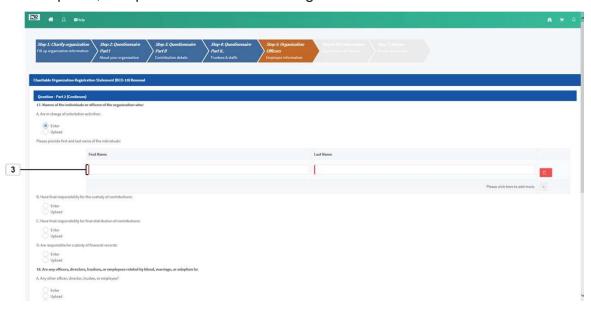
51. Start the transaction using the menu path or transaction code.



52. Select radio button of your preference

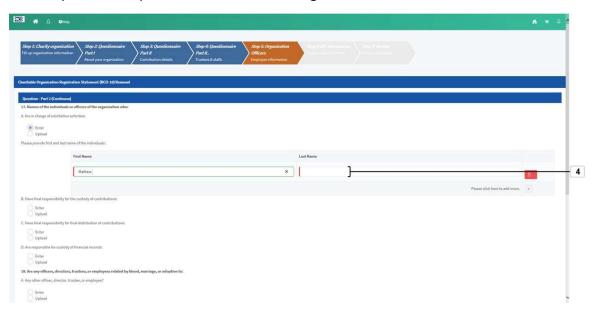






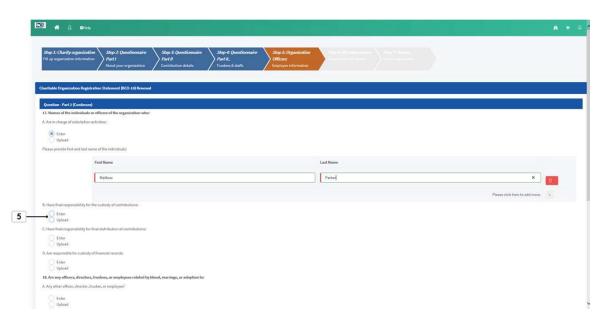
Field	R/O/C	Description
First Name	Required	Example: Mathew





Field	R/O/C	Description
Last Name	Required	Example: Parker



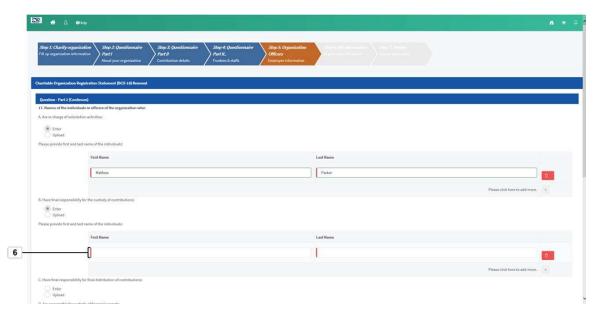


55. Select radio button of your preference



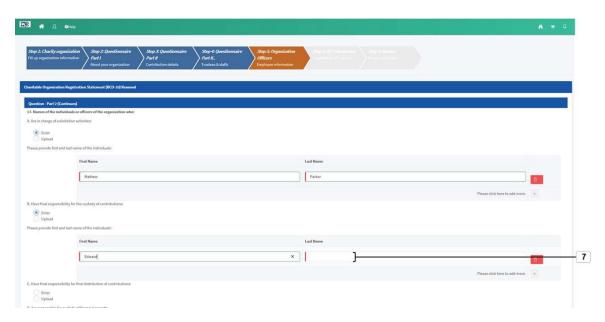
Last published: 3/11/2020 BCO-10 Renewal Part II.udc 5/31





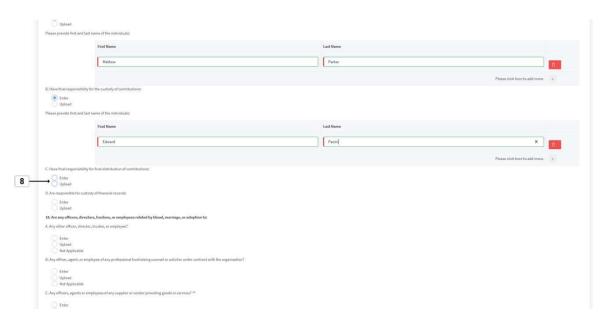
Field	R/O/C	Description
First Name	Required	Example: Edward





Field	R/O/C	Description
Last Name	Required	Example: Pacini



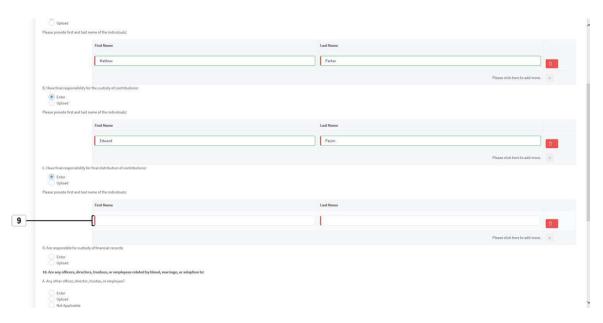


58. Select radio button of your preference

Enter Upload

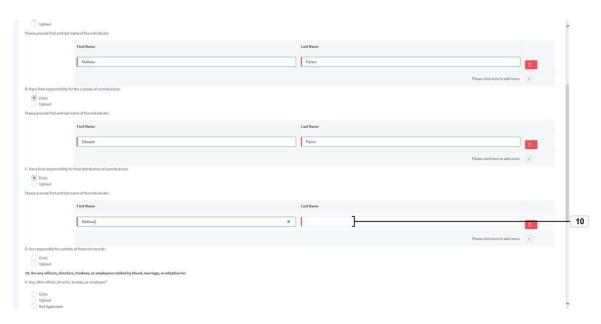
Last published: 3/11/2020 BCO-10 Renewal Part II.udc 8/31





Field	R/O/C	Description
First Name	Required	Example: Mathew





Field	R/O/C	Description
Last Name	Required	Example: Parker



61. Select radio button of your preference

Upload

Flavor provide rot and load conser of the vido cloud.

Flavor provide rot and load conser of the vido cloud.

Flavor provide rot and load conser of the vido cloud.

Flavor provide rot and load conser of the vido cloud.

For the rot provide rot and load conser of the vido cloud.

For the rot provide rot and load conser of the vido cloud.

For the rot provide rot and load conser of the vido cloud.

For the rot provide rot and load conser of the vido cloud.

For the rot provide rot and load conser of the vido cloud.

For the rot provide rot and load conser of the vido cloud.

For the rot provide rot and load conser of the vido cloud.

For the rot provide rot and load conser of the vido cloud.

For the rot provide rot and load conser of the vido cloud.

For the rot provide rot and load conser of the vido cloud.

For the rot provide rot and load conser of the vido cloud.

For the rot provide rot and load conser of the vido cloud.

For the rot provide rot and load conser of the vido cloud.

For the rot provide rot and load conser of the vido cloud.

For the rot provide rot and load conser of the vido cloud.

For the rot provide rot and load conser of the vido cloud.

For the rot provide rot and load conser of the vido cloud.

For the rot provide rot and load conser of the vido cloud.

For the rot provide rot and load conser of the vido cloud.

For the rot provide rot and load conser of the vido cloud.

For the rot provide rot and load conser of the vido cloud.

For the rot provide rot and load conser of the vido cloud.

For the rot provide rot and load conserved rot vido cloud.

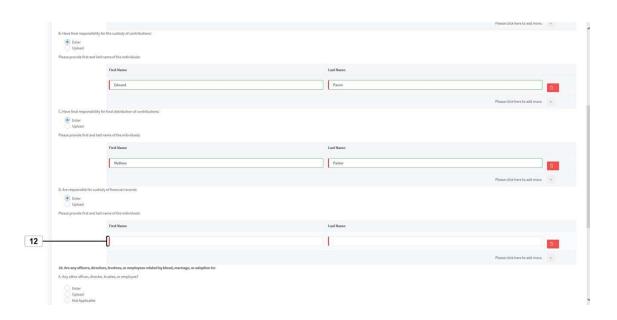
For the rot provide rot and load conserved rot vido cloud.

For the rot provide rot and load conserved rot vido cloud.

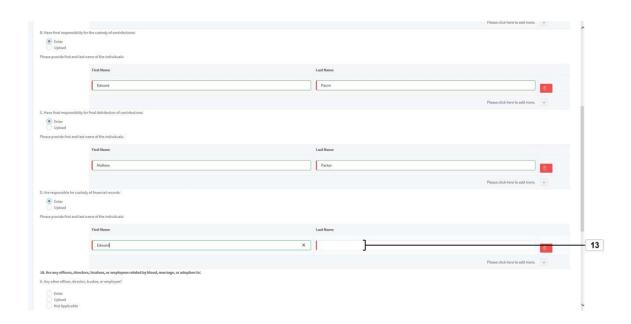
For the rot provide rot and load conserved rot vido cloud.

For the rot provide rot rot rot vido cloud.

For the rot provide r







Field	R/O/C	Description
Last Name	Required	Example: Pacini



Enter
Upload
Not Applicable

Description of country of featured records

First frame

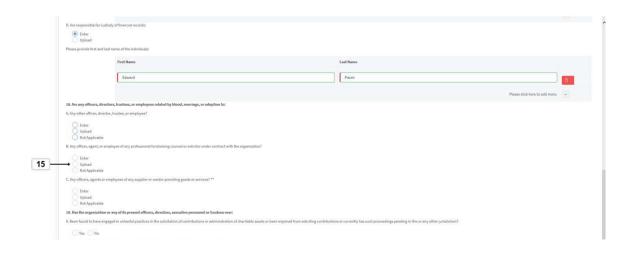
Test frame

Test

Previous Save And Continue Save And Exit



65. Select the correct radio button Vot Applicable .

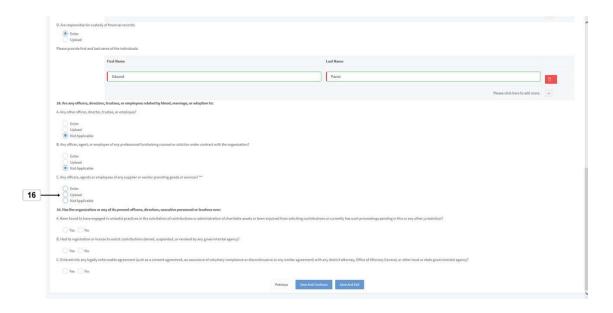


Enter



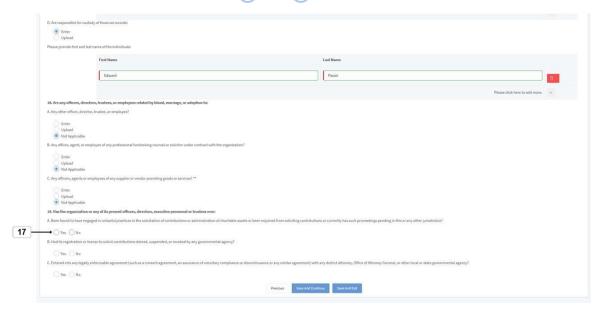
66. Select the radio button

Enter
Upload
Not Applicable

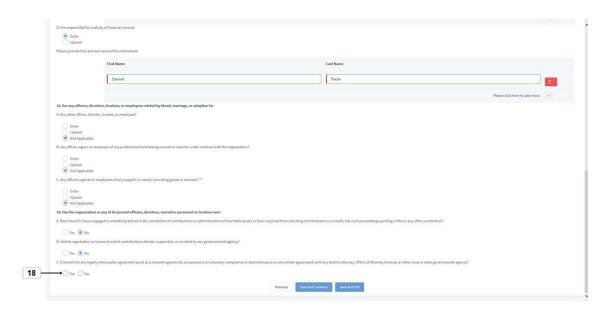




67. Select the correct radio button Yes No



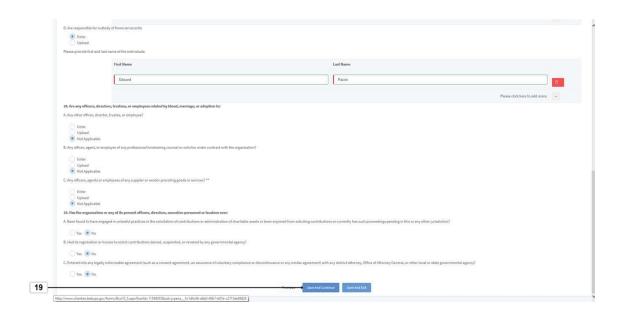
68. Select the correct radio button \bigcirc Yes \bigcirc No .





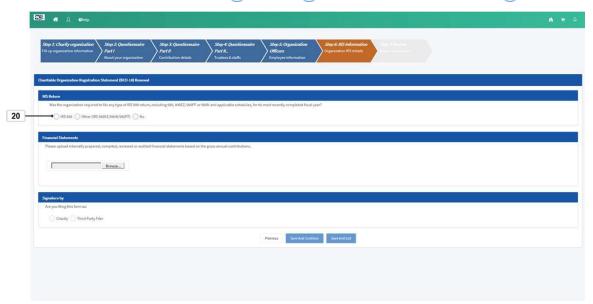
69. Select Save And Continue button

Save And Continue

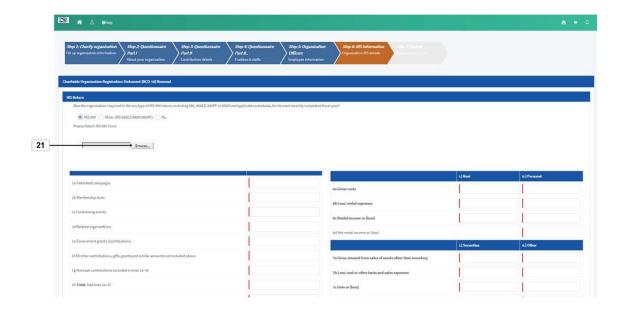




70. Select the correct radio button (IRS 990 Other (IRS 990EZ/990N/990PF) No

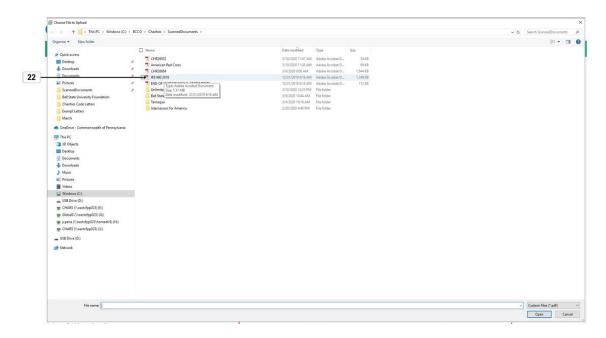


71. Select the Browse... button Browse...

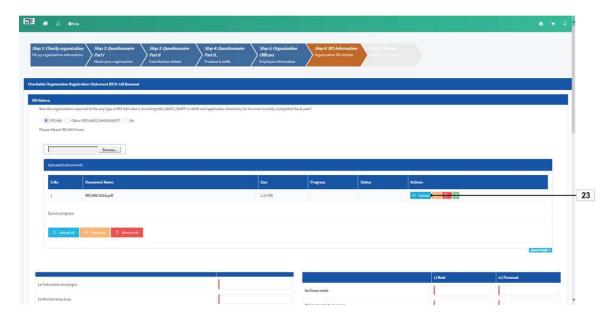




72. Double-click or click and open the file to be attached TIRS 990 2018







73. To complete the upload process, select Upload button Upload.

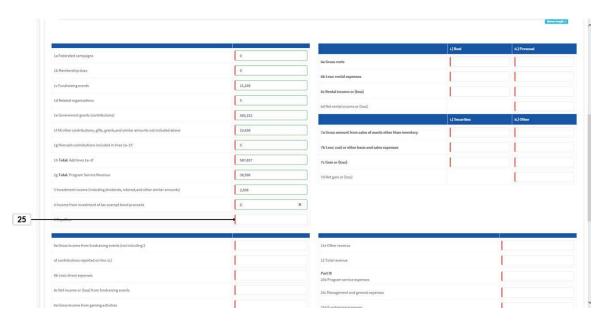




74. Select the Federated campaigns text box and insert the amount

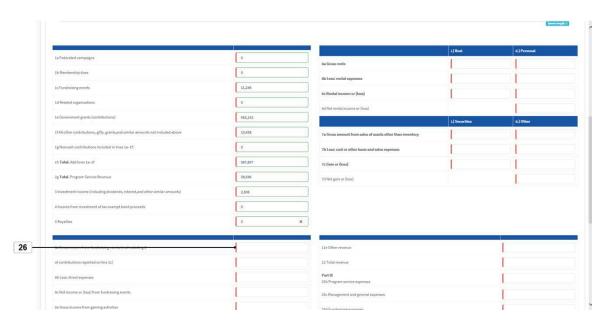
Last published: 3/11/2020 BCO-10 Renewal Part II.udc 21/31





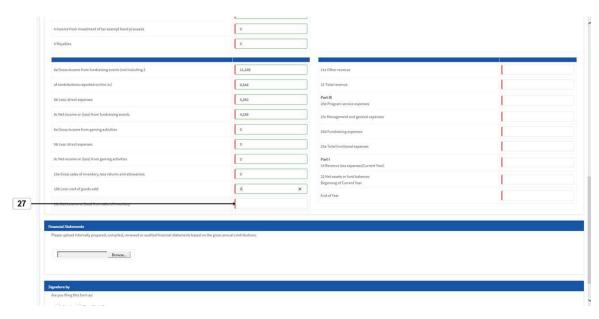
75. Select the Royalties text box and insert the amount





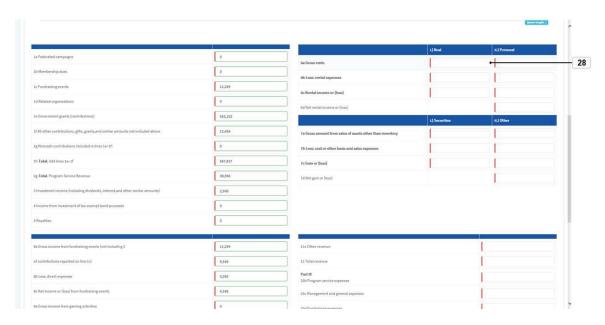
76. Select the Gross income from fundraising events text box and insert the amount





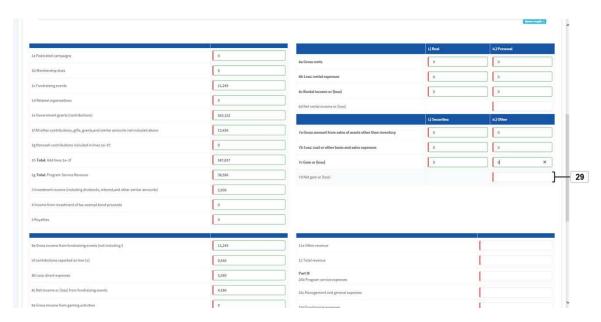
77. Select the Net income or (loss) from sales of inventory text box and insert the amount





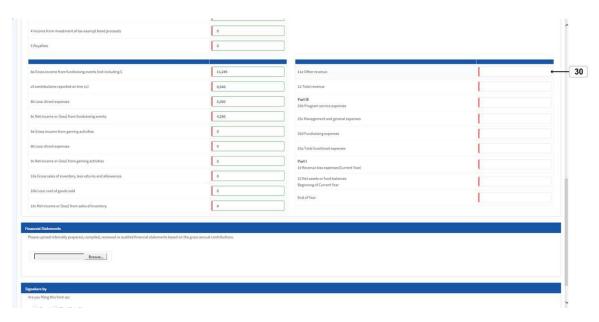
78. Select the Gross rents-Real text box and insert the amount





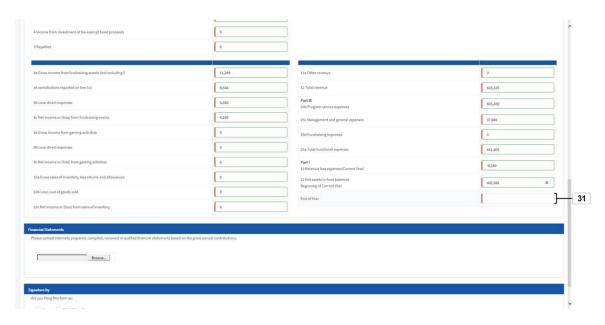
Field	R/O/C	Description
ii.) Other	Required	Example:





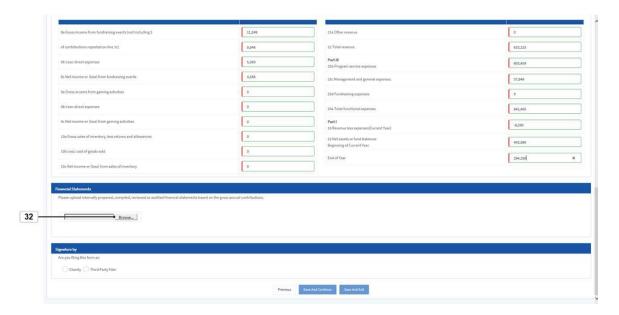
80. Select the Other revenue text box and insert the amount





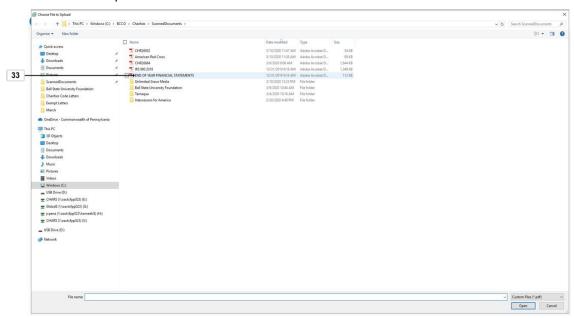
Field	R/O/C	Description
End of Year	Required	Example: 394306





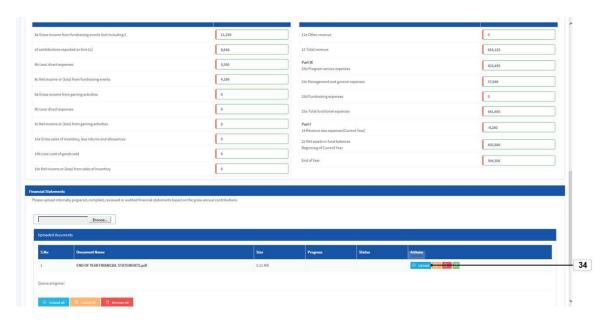
82. If applies to your organization, select the Browse... button Browse... to attach the financial statements.

Choose File to Upload



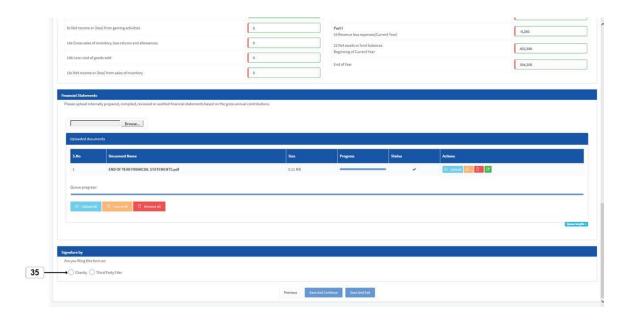


83. Double-click or select and open the correct file END OF YEAR FINANCIAL STATEMENTS.



84. To complete the upload process, select Upload button O upload.

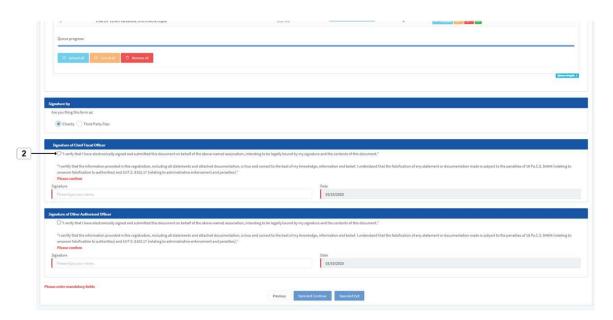




85. Select the correct option for your situation O Charity O Third Party Filer .

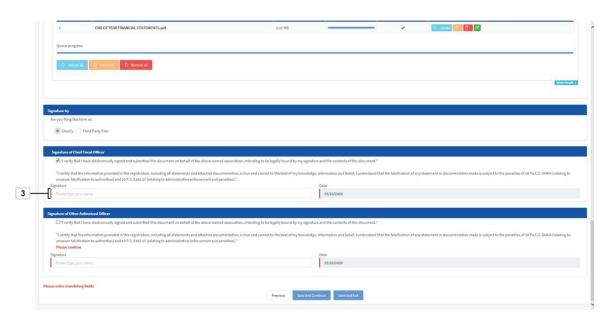


86. Read the statement before clicking on the signature check box.



87. The user must click on check box "I verify that I have electronically signed and read the statement below.



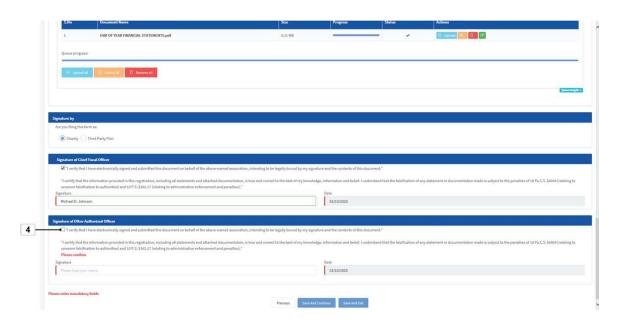


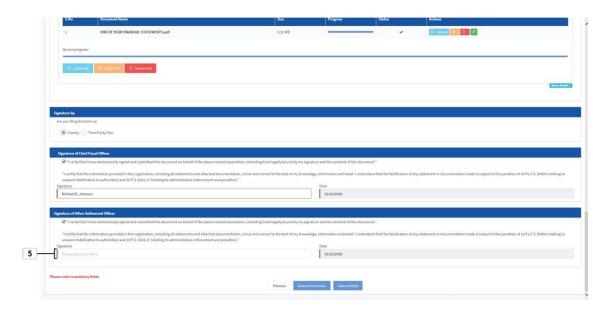
88. As required, complete the *Please type your name* fields:

Field	R/O/C	Description
Signature	Required	Example: Michael D. Johnson



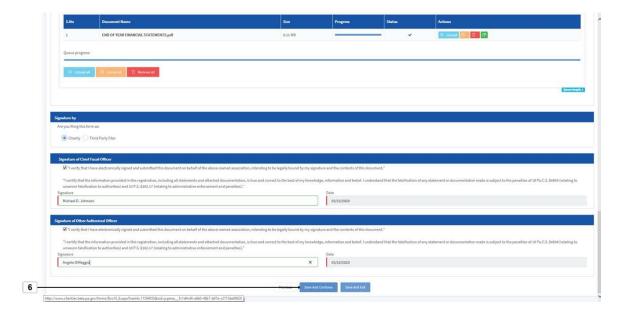
89. The user must click on check box 🗆 "I verify that I have electronically signed and submitted







Field	R/O/C	Description
Signature	Required	Example: Angela DiMaggio



91. Select Save And Continue button

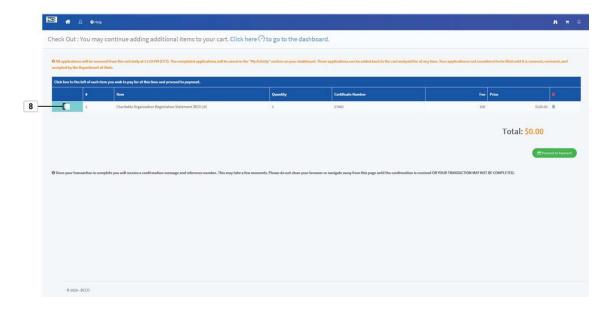
Save And Continue



92. Select Add to Cart button Add to Cart

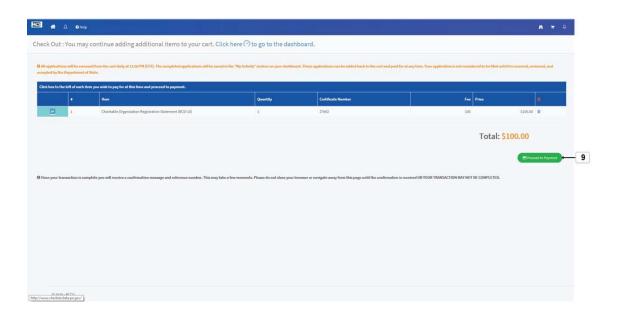


93. As required, complete the check box to proceed to check out:



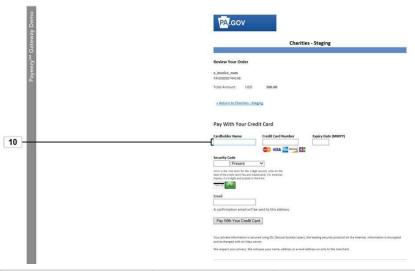


94. Select the Proceed to Payment button ☐ Proceed to Payment





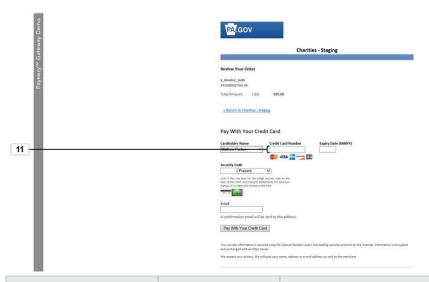
95. As required, complete card name fields:



Field	R/O/C	Description
Cardholder Name	Required	Example: Mathew Parker



96. As required, complete credit card number field:



Field	R/O/C	Description
Credit Card Number	Required	Example: 4111111111111111111111111111111111111



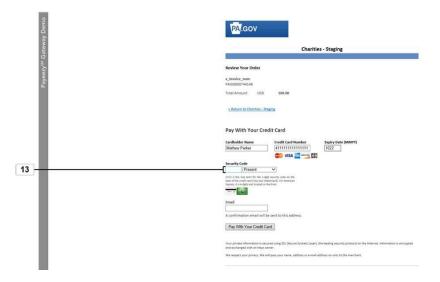
97. As required, complete expiration date field:



Field	R/O/C	Description
Expiry Date (MMYY)	Required	Example: 1022



98. As required, complete security code field:



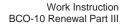
Field	R/O/C	Description
Security Code	Required	Example: 1234



99. As required, complete/review the following fields:



Field	R/O/C	Description
Email	Required	Example: mparker40@hsofgcpa.org





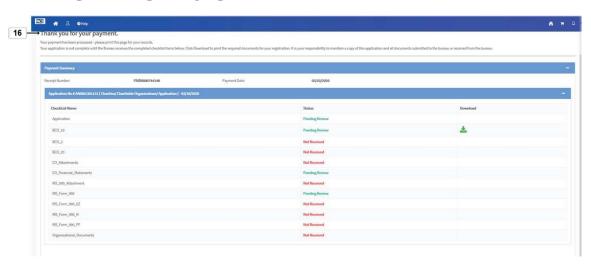


100. Select Pay With Your Credit Card button Pay With Your Credit Card

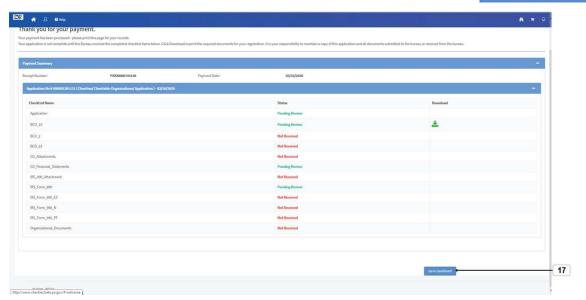


101. You will see a payment confirmation screen

Thank you for your payment.



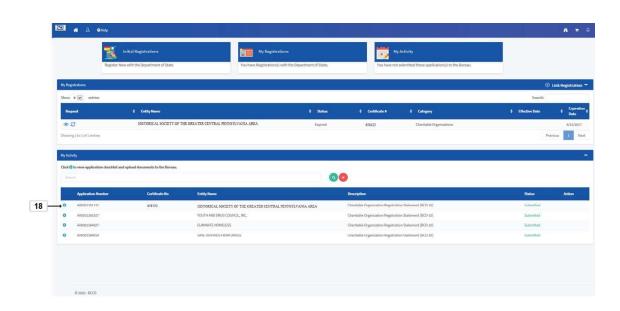
102. To navegate to your dashboard select the Go to Dashboard button Go to Dashboard





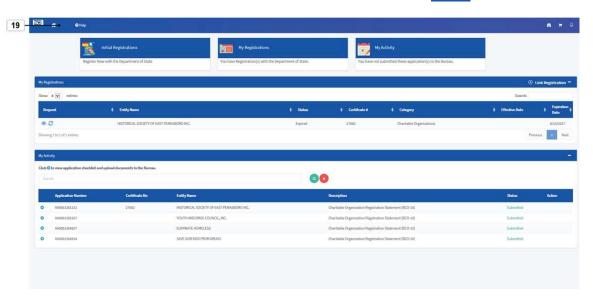
103. Once you submitted the application you will be able to see it on your dashbaord with an Application Number assigned to it

AA0001391131 658423 IIISTORICAL SOCIETY OF THE GR





104. You can log out of the system by selecting the human icon



105. To logout select Logout icon Logout.

