

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 complete, as-submitted copy of IRS Forms 990, 990-EZ or 990-PF including all schedules and attachments in PDF format. If you only file IRS Form 990-N, the Registry does not require a copy.
- All data as required on [Form RRF-1 & Instructions](#). You will not need to upload the PDF itself. Use of the Online Renewal System is in lieu of submitting Form RRF-1.
- 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](#).
- Organizations not required to, *and do not*, file IRS Form 990 or 990-EZ with the IRS must submit a complete and *hand-signed* [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.
 - Print and hand-sign. Only an agent authorized to sign on behalf of the organization may sign.
 - Scan the completed, signed form to a PDF file.
- **Do not include public and confidential documentation in the same PDF.** Have ready a separate PDF file for all **confidential** portions of the IRS Form 990 or 990-EZ (e.g. Schedule B) and any other documentation. There is software (e.g. Adobe Acrobat) and other online tools to separate certain pages of existing PDFs into separate files.
- 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 no more than 6 MB each. See [Tip: Reducing PDF File Size](#).
 - Not be password protected. They will be deleted.
- If you are not required to (and do not) file IRS Form 990 or 990-EZ and your total revenue is \$50,000 or more, have ready either [Form CT-TR-1 & Instructions](#) or a PDF document explaining why you need not submit either.
- There is a Renewal Fee required from organizations with total revenue of \$25,001 or more. 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, before clicking on the green text to go to the [Online Renewal System](#), see [User ID & Password](#).