



Charity – Commercial Fundraisers – Trust “CFT” FAQ and Troubleshooting

Purpose: This document provides information to assist with troubleshooting online filing issues. If you experience an issue that is not addressed within this document, please use the “contact info” link above to contact our office.

Organization Name:

- **The organization name is gray and cannot be edited.**
 - If the organization provides a UBI number connected to a business registered with the Secretary of State Corporations Division, the system will automatically use the legal business name on file to complete the organization name field. If the organization is also a registered business, it is required for both names to match. If the organization uses other names to solicit, these can be entered under the also known as “AKA” name section.

UBI Number: If the organization is registered as a business with the Secretary of State Corporations Division, the UBI Number should be provided. Providing the UBI number makes it easier for you and this office to link any charitable and business registrations that may be on file for your organization.

Federal Tax Exempt Status:

- I selected “No” but when I try to continue, an error message says that I need to upload a document.
 - To resolve, select “Yes” to the federal tax exempt status question, then select “No” again. This will reset the data in this section and the system will not require an upload.

Financial information:

- **The financial information fields are gray and show zeros.**
 - This is a technical error that our office is diligently working to resolve. Please upload a solicitation/financial report for your specific organization type in the “upload additional documents” section. The report should be completed for the most recent fiscal year. Blank financial reports can be found under the “Supplemental Documents” section of the forms page: sos.wa.gov/charities/allforms
- **The fiscal year pre-populated in the online form is inaccurate.**
 - Has the organization’s accounting year changed since its last renewal?
 - If yes, an Amendment will need to be completed prior to submitting a Renewal or Re-Registration filing.
 - To file an Amendment, if currently in an Active or Delinquent status: select the appropriate Amendment filing type under “Charities Filings” in the navigation menu. Search for the organization, select, and then continue. Within the filing, select “Yes” to the question asking if the organization’s accounting year has changed. Where prompted, enter the beginning and ending dates for the organization’s new, complete accounting year. The system will



automatically populate the short year dates and provide data entry fields for the corresponding financial figures. Once all data entry is complete, continue to the shopping cart and submit. There is no filing fee for an Amendment, therefore no payment is required.

- To file an Amendment, if currently in an Involuntarily Closed status: upload to the “upload additional documents” section the supplemental amendment form found under the “Supplemental Documents” section of the forms page: sos.wa.gov/charities/allforms
- The accounting year was previously reported accurately and has not changed, however, the wrong accounting year is pre-populated.
 - Please email charities@sos.wa.gov with the organization name, registration number, and a description of the error for review and possible resolution prior to submitting the filing.
- **The beginning gross assets reflected are not accurate.**
 - Review the ending gross assets from the previous accounting year. If the ending gross assets from the previous year were reported inaccurately, the organization will need to file an Amendment to update the financial history before submitting the Renewal or Re-Registration.
 - To file an Amendment, if currently in an Active or Delinquent status: select the appropriate Amendment filing type under “Charities Filings” in the navigation menu. Search for the organization, select, and then continue. Within the filing, select the edit icon next to the accounting year with the inaccurate financial information. A section will appear with data fields above the financial history grid. Review all financial information for accuracy, then select Update. Once all data entry is complete, continue to the shopping cart and submit. There is no filing fee for an Amendment, therefore no payment is required.
 - To file an Amendment, if currently in an Involuntarily Closed status: upload to the “upload additional documents” section the supplemental amendment form found under the “Supplemental Documents” section of the forms page: sos.wa.gov/charities/allforms
- **We are re-registering and want to provide the most recent fiscal year with the missed fiscal year the system is requiring.**
 - The organization may submit the most recent fiscal information by uploading a solicitation/financial report for your specific organization type in the “upload additional documents” section. The report should be completed for the most recent fiscal year. Blank financial reports can be found under the “Supplemental Documents” section of the forms page: sos.wa.gov/charities/allforms
- **We are re-registering, however, if we only provide the fiscal year being asked for our renewal will be due again in less than 60 days.**
 - The organization will need to submit either:
 - The most recent fiscal information by uploading a solicitation/financial report for your specific organization type in the “upload additional documents” section. The report should be completed for the most recent fiscal year. Blank financial reports can be found under the “Supplemental Documents” section of the forms page: sos.wa.gov/charities/allforms



- **OR**
- A statement in the “upload additional documents” section. The statement will need to include that the organization understands that an additional renewal will need to be filed and that the organization will not be receiving a renewal notice as it is within 60 days of its renewal date.

The system will not allow me to enter the re-registration and giving me an error or just not loading:

- If the organization is involuntarily closed and the last fiscal year provided was a short report (which was recorded by filing an Amendment) please email charities@sos.wa.gov with the organization name, registration number, and a description of the issue for review and resolution. This is a technical error that our office is diligently working to resolve. We can temporarily adjust the registration to allow the organization to successfully submit the re-registration online. We will then clean up the organization’s record after the re-registration submission is completed.

Trust tax document:

- My type of tax of document is not an option in the drop down.
 - Please select “990N” if none of the listed options apply. We will be adding “other” as an option in the future; once “other” is available, we will update the organization’s records accordingly.
- I am unable to upload my tax document because it is larger than 10MB.
 - The tax document will need to be split into two or more files that are each smaller than 10MB. Upload all files that make up the tax document within this section by selecting Upload, selecting the file, and selecting okay. Repeat the steps until all files have been uploaded.

If you experience any issues that are not addressed in this document, please contact our office using the information located on our website: sos.wa.gov/corps/contactinfo