



**Provider Guide to
Updating Filings in HHS Accelerator**

Charitable organizations operating in New York State must file annual financial reports with the Attorney General's Office. Please note that the actual filing is with the Charities Bureau. The City requests a record of your filing to verify your organization is in compliance. The annual filings deadlines can be found at the end of this guide.

The HHS Accelerator System sends notifications to your organization prior to your CHAR500 expiring in the system. In order to maintain your Approved Status to compete for Health and Human Service contracts in New York City, it is important that your organization takes the appropriate action to stay current in its filings. If your organization does not upload the record of the filing to the system by the deadline, your Application Status in the system will change to Suspended.

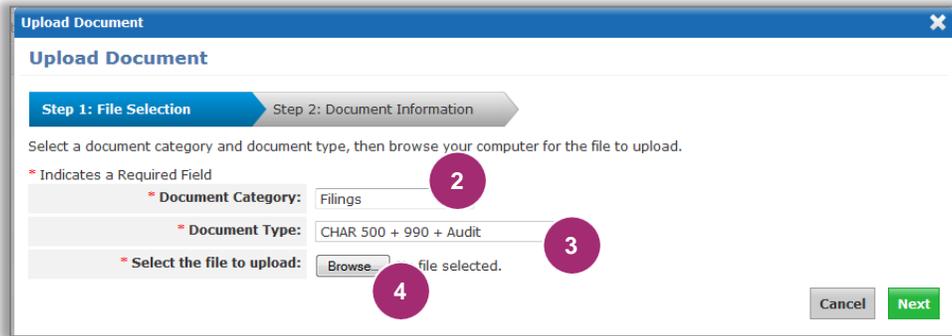
Your organization can address this status change by uploading either the NYS Form Char500 (signed with 2 signatures) or a Char500 Extension Document. The extension document we accept is a copy of the email sent to charities.extensions@ag.ny.gov. The IRS Form 8868 is no longer accepted.

Uploading the Filing Document to the System

It is very simple to upload your filing document to the system to maintain your Approved Status. The filings document must be uploaded to the correct location in your Document Vault. You must be logged into your account to upload a new document to your Document Vault. Once logged in, click the **“Document Vault”** button at the top of the page to access your Document Vault.

| Document Name | Document Type | Modified | Shared | Actions |
|---|---------------------------------------|------------|------------|--------------|
| <input type="checkbox"/> Board List | Board of Directors List or Equivalent | 10/31/2013 | Not Shared | I need to... |
| <input type="checkbox"/> Proposal 1 | Budget | 11/07/2013 | Not Shared | I need to... |

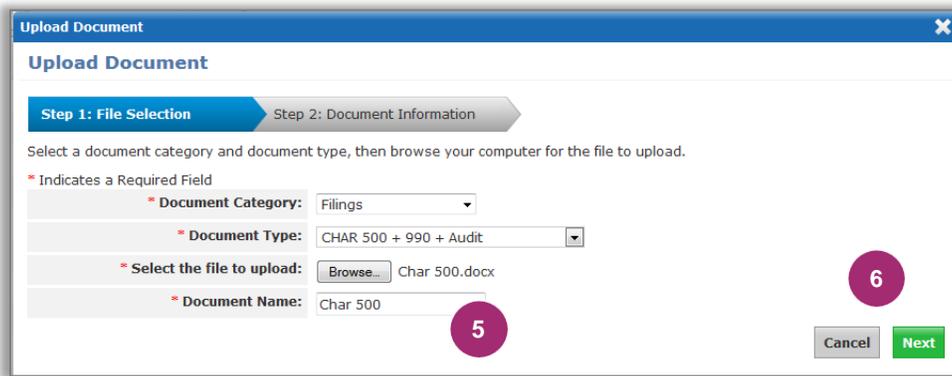
1. Click the **“Upload”** tab to upload a new document.



2. Select the Document Category **“Filings.”**

3. Select the **“CHAR500 Document Type”** depending on the document you are uploading.

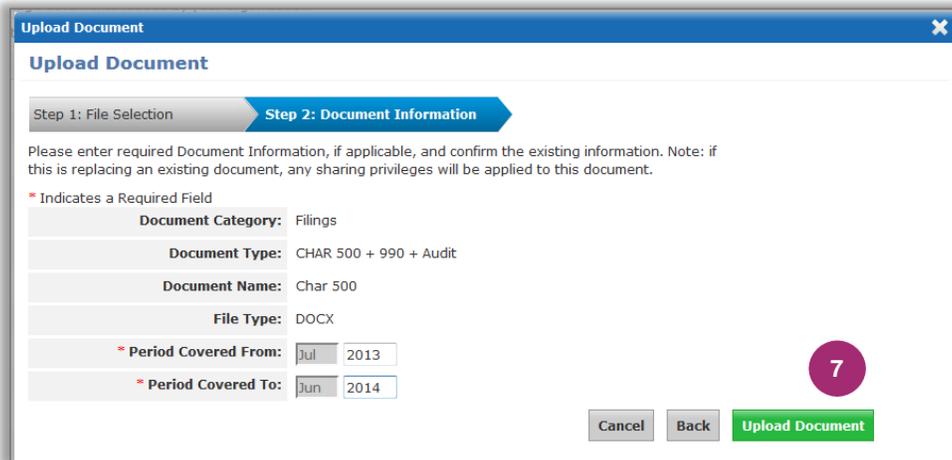
4. **“Select the File to Upload”** and upload the required document.



5. Enter the desired **“Document Name.”**

The “Document Name” field will default to the document’s file name.

6. Click **“Next.”**



The Period covered will automatically pre-populate.

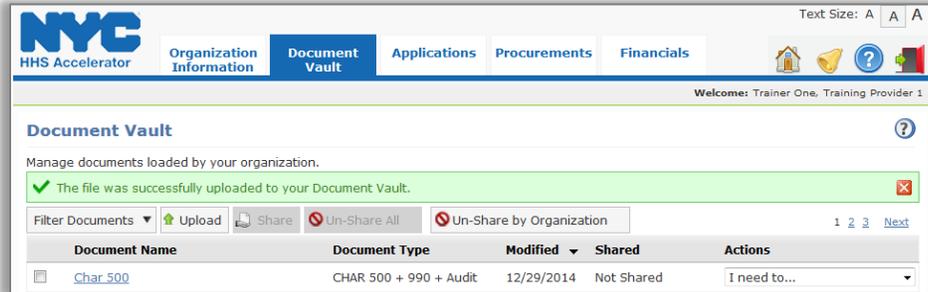
7. Click **“Upload Document.”**



It is important that you create unique file names for new files uploaded to your Document Vault, as newly uploaded documents with duplicate file names will overwrite preexisting documents.

Upload Confirmation

Once the upload is complete, you will be redirected to your Document Vault and receive system confirmation of your successful upload.



Once you have successfully updated the filings document to your vault, your provider status on the homepage will say Approved. The filings expiration warning will no longer appear. This is your confirmation.

Below are two charts that outline the required deadlines for filing based on your organization’s filing type and fiscal year.

7A/Dual Annual Filings Deadlines to Submit Report on Completed Fiscal Year

| Month Fiscal Year Ends | Last Day of Fiscal Year | 7A/Dual | 7A/Dual Extension Expires |
|------------------------|-------------------------|--------------------------|---------------------------|
| 1 | January 31 | June 15 (same year) | December 15 (same year) |
| 2 | February 28 | July 15 (same year) | January 15 (next year) |
| 3 | March 31 | August 15 (same year) | February 15 (next year) |
| 4 | April 30 | September 15 (same year) | March 15 (next year) |
| 5 | May 31 | October 15 (same year) | April 15 (next year) |
| 6 | June 30 | November 15 (same year) | May 15 (next year) |
| 7 | July 31 | December 15 (same year) | June 15 (next year) |
| 8 | August 31 | January 15 (next year) | July 15 (next year) |
| 9 | September 30 | February 15 (next year) | August 15 (next year) |
| 10 | October 31 | March 15 (next year) | September 15 (next year) |
| 11 | November 30 | April 15 (next year) | October 15 (next year) |
| 12 | December 31 | May 15 (next year) | November 15 (next year) |

EPTL Annual Filings Deadlines to Submit Report on Completed Fiscal Year

| Month Fiscal Year Ends | Last Day of Fiscal Year | EPTL | EPTL Extension Expires |
|------------------------|-------------------------|--------------------------|--------------------------|
| 1 | January 31 | July 31 (same year) | January 31 (next year) |
| 2 | February 28 | August 31 (same year) | February 28 (next year) |
| 3 | March 31 | September 30 (same year) | March 31 (next year) |
| 4 | April 30 | October 31 (same year) | April 30 (next year) |
| 5 | May 31 | November 30 (same year) | May 31 (next year) |
| 6 | June 30 | December 31 (same year) | June 30 (next year) |
| 7 | July 31 | January 31 (next year) | July 31 (next year) |
| 8 | August 31 | February 28 (next year) | August 31 (next year) |
| 9 | September 30 | March 31 (next year) | September 30 (next year) |
| 10 | October 31 | April 30 (next year) | October 31 (next year) |
| 11 | November 30 | May 31 (next year) | November 30 (next year) |
| 12 | December 31 | June 30 (next year) | December 31 (next year) |



STATE OF NEW YORK
OFFICE OF THE ATTORNEY GENERAL

Extension Request Procedure Change: 180 Day Extension of Time to File is Granted
Date: March 17, 2015

Effective immediately, the New York State Attorney General’s Charities Bureau will grant an automatic 180 day extension of time to file an Annual Financial Report due pursuant to the Estates, Powers and Trusts Law and/or Article 7-A of the Executive Law. A written request is not required. Registered charitable organizations must file their Form CHAR500 (NYS Annual Filing for Charitable Organizations) and all required attachments and fees within 180 days of the statutory deadline.

Please note that the Charities Bureau’s policy does not affect the Internal Revenue Service’s requirement to file requests for extension of time to file or any similar requirement of any other state. Charitable organizations that are required to file requests for an extension of time to file with the Internal Revenue Service must keep such documents as part of their financial records for at least three years and make them available to the Charities Bureau upon request.

Pursuant to Title 13 of the New York Code of Rules and Regulations, the Charities Bureau may, in its discretion, deny an extension regardless of whether a corresponding extension request has been approved by the IRS.

CHAR500 Annual Filing Due Dates By Registration Category (7A, DUAL, EPTL)

| Fiscal Year End | 7A or DUAL Filing Due | 7A or DUAL Extended Due Date | EPTL Only Filing Due | EPTL Only Extended Due Date (1YR) |
|------------------------|------------------------------|-------------------------------------|-----------------------------|--|
| January 31 | June 15 | December 15 | July 31 | January 31 |
| February 28 | July 15 | January 15 | August 31 | February 28 |
| March 31 | August 15 | February 15 | September 30 | March 31 |
| April 30 | September 15 | March 15 | October 31 | April 30 |
| May 31 | October 15 | April 15 | November 30 | May 31 |
| June 30 | November 15 | May 15 | December 31 | June 30 |
| July 31 | December 15 | June 15 | January 31 | July 31 |
| August 31 | January 15 | July 15 | February 28 | August 31 |
| September 30 | February 15 | August 15 | March 31 | September 30 |
| October 31 | March 15 | September 15 | April 30 | October 31 |
| November 30 | April 15 | October 15 | May 31 | November 30 |
| December 31 | May 15 | November 15 | June 30 | December 31 |

Registration Categories:

- 7A filers are registered to solicit contributions in New York under Article 7-A of the Executive Law
- EPTL filers are registered under the Estates, Powers & Trusts Law ("EPTL") because they hold assets and/or conduct activities for charitable purposes in NY.
- DUAL filers are registered under both 7A and EPTL.

[Contact us](#) or visit the Charities Registry at www.CharitiesNYS.com to confirm your registration category.