Technical User Guide – How do I use ‘MyAccount’?

Introduction

*MyAccount* will allow you to:

- Manage and update your charity’s records on the Register of Charities, if you are authorised to do so;
- Submit your annual report to us;
- Apply to register a new organisation;
- Submit an application for services under the Charities Acts 1961 and 1973;
- Correspond with us about your application or registered charity and view important notifications from us such as annual report reminders, publication of new guidance etc;
- See a history of your dealings with us;
- Create and manage other users on your account (if you are designated as an administrator).

Before using the new system, first read the ‘Getting started and Technical Questions’ section below to ensure that you are set up correctly. Note you can use the bookmarks on the left hand side. Select the > sign to see the questions under each bookmark.

Refer to this manual while using *MyAccount* to help you navigate your way through the new system. You may consider printing it out as a Handy Reference Guide (Select File - Print).
This chapter describes getting started and any technical questions.

Q. Which browser should I use?

MyAccount works best using Google Chrome.

You can also view MyAccount with a wide range of browsers, including Internet Explorer, Mozilla Firefox and Safari.

You can download the latest versions of these browsers from the following links:

Google Chrome

Microsoft Internet Explorer

Mozilla Firefox

Safari.

Q. Can I use a mobile or tablet?

Yes but the best experience is with a desktop computer.

Q. Which operating system can MyAccount run on?

Windows XP

Windows Vista

Mac OS9

Mac OSX
Q. I don’t have an account, how do I create one?

Click on ‘Log in’ button at top right of the home page of our website. Then click on ‘Create Account’ at the bottom of the Sign In Screen.
User Details

Username *

Password *

Confirm Password *

First Name *

Last Name *

Email *

Confirm Email *

Phone Number *

Account Details

Preferred Language *

English

I have read and accept the Charities Regulator’s Website Privacy Notice and the Statement of Information Practices.

Register [x]
Enter your User Details

Enter the **Username (log-in name)** you want to use to log into *MyAccount* in future. It must be unique and something you will easily remember. It does not need to be an email address or your name.

Enter a **Password** for your log in name. It must contain 8-16 characters, including at least one capital letter and one number. **Confirm Password** by re-typing it. The screen will indicate if you have entered the password incorrectly.

Enter your **First Name and Last Name**.

Enter a valid **Email** address to receive confirmation emails and any further correspondence from us. **Confirm Email** by re-typing it. The screen will indicate if you have entered the email incorrectly.

Enter a **Phone Number**, which we can use to contact you – this can be a landline or mobile number.

**Enter your Account Details**

Indicate your preferred language: English or Irish.

You will need to tick the box to confirm that you have read and accepted the terms and conditions and the data protection statement.

Once you have entered all mandatory data, marked with a red asterisk *, click the ‘Register’ button. An email will then be sent to the email address you have provided. This email contains a verification link.

Once you receive the email, please click on the link and you will receive a pop-up indicating that your user account has been verified.

Click the log-in button in the pop-up display to log in. Enter the log-in name and password that you used to create the account initially and click the log-in button.

Once successfully logged in, your *MyAccount* home page will be displayed.
Q. I have an account, how do I log in?

To log into MyAccount, click on the ‘Log In’ button at the top right of the home page of our website, then enter your user name and password and click ‘Login’. Once you are successfully logged in, your MyAccount home page will be displayed.

To ensure the best possible experience, please use Google Chrome as your web browser when logging into MyAccount.

Q. How do I reset my password?

Click on ‘Forgot Password’ at the log in screen. Enter your username and submit. You will then receive an email with a link, click on the link to enter a new password and submit.

Q. How do I update my own user details in MyAccount?

You must be logged into MyAccount to update your own user details. Once logged in, click on the symbol at the top right of the screen and click on ‘Profile’ to open your account.

Make the required amendments and, once finished, click on ‘Save.’

Q. How do I view messages or send a message to the Charities Regulator from MyAccount?

You must be logged into MyAccount to view your messages or to send us a message from your account.

Once logged in click on ‘Messages’ in the menu at the left of the MyAccount home page to open a list of all messages under various headings.
To view a message in any of the three tabs (Inbox, Sent and Drafts), click on it and it will open in the window – from here you can then also print the message.

To send us a new message click on ‘New Message’ and then ‘General Correspondence’. Enter a subject and your message, attach a document if required, and either save it to send later, or send it.
Q. How do I navigate *MyAccount*?

**Dashboard**

When you log into *MyAccount*, it opens the home page (called the ‘Dashboard’) which displays the following:

*‘Overview’:* which displays a ‘doughnut’ summarising the activity on your account and a list of filings. You can access your filings by clicking on the relevant heading, or on the doughnut.

*‘Events’:* which is a list of your recent submissions and any correspondence.

*‘My Charities’:* which is a list of your registered charities.
If this is your first time logging in and there has been no activity on your account, your dashboard will look like this:

![Dashboard Image]

You will notice that there are a series of tabs down the left hand side, detailed below:

**New Filing**

You can submit new ‘filings’ from this from this area. ‘Filings’ are forms and there are different types of forms, depending on whether your organisation is making an application for registration or is already a registered charity.

**My Filings**

You can search and review your filings from this area. The views are presented in tabs to assist, complete with filtering functionality to refine your search. These tabs are:

- drafts,
- signatures (only relevant if you have submitted an application under the Charities Acts 1961 and 1973 as amended),
- filings you have submitted,
- filings that have been returned to you,
- filings that have been rejected,
- filings which have been registered, and
- filings which have been cancelled.
**Messages**

Under ‘Messages’, you can see all the messages you have received from us, sent to us, or saved as drafts. You can see this in three tabs and can also search for a message using the search bar.

**Account**

Under ‘Account’, you can maintain your account and user profiles. You can view and edit your account details. The facility also provides you with a listing of all users under your account. You can edit and add/remove users from your account.

**Help**

Clicking on the ‘Help’ option at any stage will bring you to the user manual for that page or form.

**Q. How do I upload a PDF in a form?**

Any documents to be attached (uploaded) must be in PDF (Portable Document Format) with a maximum size of 10mbs. Please name the file you are uploading so that it clearly represents the contents of the document e.g. Charity X Governing Document.

Then click ‘Select File(s)’
Locate the file you wish to upload, select it and click ‘Open’.

Alternatively, you can drag and drop by clicking on the PDF you want to upload, with your left mouse button, then, without releasing the button, drag it to the desired location and release the mouse button to drop it.
Q. What do the icons in the forms mean?

Throughout the forms there are icons. This table indicates their meaning:

<table>
<thead>
<tr>
<th>Icons</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>🏛️</td>
<td>This icon means that information provided will appear on the public Register of Charities.</td>
</tr>
<tr>
<td>🌐</td>
<td>This icon means that you can move your mouse over any help symbols for further information.</td>
</tr>
<tr>
<td>🔄</td>
<td>This icon once selected will enable you to upload documents.</td>
</tr>
<tr>
<td>🔄</td>
<td>This icon once selected means you can download this document.</td>
</tr>
<tr>
<td>🕒</td>
<td>This icon appears next to questions with the calendar icon when a date is required to be selected.</td>
</tr>
<tr>
<td>✕</td>
<td>Tabs marked with this symbol require further attention.</td>
</tr>
<tr>
<td>✅</td>
<td>Tabs marked with this symbol are complete.</td>
</tr>
<tr>
<td>🔴 *</td>
<td>Any field with a red asterisk * is mandatory and must be completed.</td>
</tr>
<tr>
<td>☑️</td>
<td>Questions marked “required” need to be completed.</td>
</tr>
<tr>
<td>🔍</td>
<td>Please ensure you click the “Save Draft” button throughout your application to save your progress.</td>
</tr>
<tr>
<td>🔗</td>
<td>Click the preview button to generate a printable PDF version of your application. This option is available on the “Declaration” tab in all forms.</td>
</tr>
</tbody>
</table>
Q. How do I save a Word document as a PDF? - Two options

**Option 1: Save**

In Word go to **File > Save As** instead of just saving the file.

You can then select the **PDF file type** from the drop down menu.

Save your document as a PDF.

And now you have a PDF version of your Word document, which you can use to upload to *MyAccount*.
Option 2: Export

- Another option is go to File > Export > Create PDF/XPS Document.

Click Publish if you’re done.
Q. Submit the annual report?

Annual reports become available online for completion approximately six weeks before the due date (the due date is 10 months after the financial year end of the charity).

You must be logged into MyAccount to file an annual report.

Once you are logged in, from the MyAccount dashboard select the charity from your ‘My Charities’ list (if you are an authorised filer for more than one charity, then all of them will appear in the list).

Then click on ‘Filings’ and finally click on ‘Annual Report’ in the list to open the annual report form.

When you have the form open, if you need assistance, click on ‘Help’ to open the user guide.
Alternatively, you can click on which will take you to a list of all your charities, click on the ‘Start’ button beside the relevant charity to open a list of forms available for that charity.
Q. Update the trustees of the charity?

You must be logged into MyAccount to update your charity trustees.

Once you are logged in, from the MyAccount home page select the charity from your ‘My Charities’ list (if you are an authorised filer for more than one charity, then all of them will appear in the list).

Then click on ‘Filings’ and click on ‘Maintain Trustees Connections and External Advisors’ in the list to open the ‘Maintain Trustee’ form. When you have the form open, if you need assistance, click on ‘Help’ to open the user guide.

Alternatively, you can click on ‘Start New Filing’ which will take you to a list of all your charities, click on the ‘start’ button beside the relevant charity to open a list of forms available for that charity.
Q. Update the details of the charity?

You must be logged in to MyAccount to update the details of your charity.

Once you are logged in, from the MyAccount home page select the charity from your ‘My Charities’ list, (if you are an authorised filer for more than one charity, then all of them will appear in the list).

Then click on ‘Filings’. You will then see a list of options – click on the option which relates to the update you wish to make.

Alternatively, you can click on which will take you to a list of all your charities, click on the ‘Start’ button beside the relevant charity to open a list of forms available for that charity.
A summary of the purpose of each form is included below:

<table>
<thead>
<tr>
<th>Title of form</th>
<th>Purpose of form</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maintain Contact and Location of Operations Details</td>
<td>Use this form to amend, add or delete organisational address(es) or contact details for your charity, or to add or amend the jurisdictions in which your charity operates.</td>
</tr>
<tr>
<td>Change of Charity Name</td>
<td>Use this form to apply for consent to change the name of your charity.</td>
</tr>
<tr>
<td>Form Name</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Maintain Trustees, Connections and External Advisors</td>
<td>Use this form to update, add or delete charity trustees, connections or external advisors engaged by your charity.</td>
</tr>
<tr>
<td>Maintain Bank Account</td>
<td>Use this form to update, add or delete bank or credit union account information for your charity.</td>
</tr>
<tr>
<td>Annual Report</td>
<td>Use this form to file the annual report for your charity.</td>
</tr>
<tr>
<td>Change Purpose <em>(this form includes changes to Objects or other Constitution amendments)</em></td>
<td>Use this form to apply for consent to various types of amendments to your charitable purpose or your constitution.</td>
</tr>
<tr>
<td>Maintain Fundraiser Details</td>
<td>Use this form to update fundraiser details for your charity e.g. engagement of professional fundraisers.</td>
</tr>
<tr>
<td>Winding up and De-registration of a Registered Charity</td>
<td>Use this form to notify us that your charity is winding up.</td>
</tr>
<tr>
<td>Change in Financial Year End</td>
<td>Use this form to change the financial year end date for your charity.</td>
</tr>
</tbody>
</table>

When you have a form open, if you need assistance, click on ‘Help’ button to open the user guide.

**Q. View the forms and annual reports filed for the charity?**

You must be logged into *MyAccount* to view your filings.

Once you are logged in, from the *MyAccount* home page there are two ways to view your filings:
Click on ‘My Filings’ in the menu at the left of the home page to open a list of filings you have made under various status headings: Drafts, Signatures, Submitted, Returned, Rejected, Registered and Cancelled.

Click on the relevant heading to open all forms, reports and documents for the charity. You can then download the full details of the form by clicking on the icon.

OR

At the home page, click on the relevant heading at the ‘Submission Filings’ list to open all your filings, then

You can download a filing by clicking on the icon.

Q. Give someone else in my charity access to view and file forms for the charity?

Important note: To ensure the security of your account and to comply with Data Protection requirements, before you add any user to your account, you must be authorised to do so by the charity trustees.

You must be designated as an account administrator before you can add anyone to your account and you must be logged in to MyAccount.

Once logged in, click on ‘Account’ in the menu at the left of the MyAccount home page to open your account profile.

Select and add the details of the individual – login name, first name and surname, password, preferred language, password, email, phone number. You will need to indicate if they will be an ‘Administrator’ (administrators can add new users) and set the user to ‘Active’, and indicate the privileges they are to have with regard to your charity – e.g. ‘Can Create Submission’, ‘Can Submit’.

If you only want them to view but not be able to edit or submit a form, do not tick anything in the ‘Privileges’ section.
You will also need to set their communication method – choose from email correspondence (receive correspondence by email) and/or HTML Email – email formatted in HTML.

**Note:** If you are an administrator for more than one charity, any new user you add will need to complete and submit an ‘Authorised Filer’ form specifically for their charity. To file an ‘Authorised Filer’ form, the new user should log in to their own account, select ‘Start New Filing’ from the home page, then ‘Existing Charity’ and then locate the charity which they are acting for, using the search function.
They should then select ‘Authorised Filer’ and complete and file the form.

They must have a letter of authorisation signed by at least one charity trustee to upload with the form. See User Guide for further explanation and sample letter. Once submitted, it will be processed and the authorised filer will be notified when access is approved.

Q. Give a third party (e.g. the charity’s accountant) access to file the annual report or other forms for the charity?

A third party user (e.g. your accountant) can be authorised to file update forms or annual reports on behalf of your charity by completing an ‘Authorised Filer’ form (please note: while a third party can submit reports and forms for your charity, it is the charity trustees who are responsible for content and accuracy).

The third party must already have been added as a new user to your account, or have created their own account, before they can apply to be an authorised filer and they must have a letter of authorisation signed by at least one charity trustee to upload with the Authorised Filer form. Here’s a link to the Authorised Filer User Guide.

To apply for authorisation, the third party should log in to their own account, select ‘Start New Filing’ from the home page, then ‘Existing Charity’ and then locate the charity which they are acting on behalf of using the search function.
Then select ‘Authorised Filer’ and complete and file the form. Once it is processed the authorised filer will be notified when access is approved.
Q. View the application I have submitted for my organisation?

You must be logged into MyAccount to view your application.

Once you are logged in, click on ‘My Filings’ in the menu at the left of the MyAccount home page to open a list of all filings (or forms) relating to your organisation under various heading tabs: Drafts, Signatures, Submitted, Returned, Rejected, Registered and Cancelled.

Click on the ‘Submitted’ heading to open all forms submitted. You can then download the full details of a form by clicking on icon.

Please note - you cannot edit an application form unless it is in the ‘Draft’ or ‘Returned’ sections.

Alternatively, you can click on the submitted heading under ‘Submission Filings’ on the dashboard to open your submission.
Q. Edit an application which has been returned to me for more information?

You must have received a message that the application has been returned to you for more information, and you must be logged into MyAccount before you can edit an application.

Once you are logged in, click on ‘My Filings’ in the menu at the left of the MyAccount home page to open a list of all filings (or forms) relating to your organisation under various heading tabs. Any form you submitted (a ‘submission’) which has been returned to you seeking more information will be available under the ‘Returned’ tab.
Alternatively, you can click on the returned heading under ‘Submission Filings’ on the dashboard to open your submission.

To open the form click on the icon to make the required edits and once complete, submit the form again.

When you have the form open, if you need assistance, click on ‘Help’ to open the user guide.
Q. Give someone else in my organisation access to the application?

**Important note:** To ensure the security of your account and to comply with Data Protection requirements, before you add any user to your account, you must be authorised to do so by the charity trustees.

You must be designated as an account administrator before you can add anyone to your account and you must be logged in to *MyAccount*.

Once logged in, click on ‘Account’ in the menu at the left of the home page to open your account profile.

Select **New User** and add the details of the individual – login name, first name and surname, password, preferred language, password, email, phone number. You will need to indicate if they will be an ‘Administrator’ (administrators can add new users) and set the user to ‘Active’, and indicate the privileges they are to have with regard to your charity – e.g. ‘Can Create Submission’, ‘Can Submit’.

If you only want them to view but not be able to edit or submit a form, do not tick anything in the ‘Privileges’ section.
You will also need to set their communication method – choose from email correspondence (receive correspondence by email) and/or HTML Email – email formatted in HTML.

Q. Authorise an accountant or solicitor to submit an application on my behalf?

While a third party can submit an application on behalf of the charity trustees of an organisation and deal with any queries arising, responsibility for the application remains with the charity trustees.

You must be designated as an account administrator before you can add anyone to your account and you must be logged in to MyAccount.
To ensure the security of your account and to comply with Data Protection requirements, before you add any user to your account, you must be authorised to do so by the charity trustees.

Once logged in, click on ‘Account’ in the menu on the left of the screen to open your account details.

Click on and add the details of the individual and the privileges you wish them to have:

**Can Create Submission** – tick to allow user to draft your application

**Can Submit** – tick to allow user to submit your application

**Can View Payments** – note that this feature is not currently operational

**Can Change Account** – note that this feature is not currently operational

Then click ‘Save’ at the bottom of the form. Once saved the new user will be able to log in to their own account.
Q. Decide which form should I use to make the application?

For any organisation applying for registration (other than a school with a roll number) there are two options:

- Charity Registration Application
- Small Charities (simplified) Application

We strongly recommend you and the rest of the charity trustees read all of our guidance documents before applying for registration.

If your organisation meets all of the following criteria you should complete a ‘Small Charities (Simplified) Application’

- The annual income of your organisation is expected to be less than €20,000 for the foreseeable future;
- Your organisation does not advance religion;
- Your organisation was established in the Republic of Ireland and will only operate and carry on activities in the Republic of Ireland;
- Your organisation does not own, or intend to own, any land or buildings;
- Your organisation does not have, or intend to have, any employees;
- The activities of your organisation do not, and will not, involve working with vulnerable groups (including children).
If your organisation does not meet all of the above criteria then you should complete a ‘Charity Registration Application’.

**Q. Submit an application to register a school?**

You must have created an account and be logged in to *MyAccount* to submit an application for a school.
Once you are successfully logged in, your *MyAccount* home page will be displayed. 

Click on ![Start New Filing](image) and then select the appropriate application from the options available: Post Primary School Registration or Primary or Special School Registration. When you have the form open, if you need assistance, click on ‘Help’ to access the user guide.

**Please note:** if your school does not have a roll number, you must complete a ‘Charity Registration Application’ form available under the ‘New Filing’ option on your *MyAccount* home page.
Q. Find the application form which I need to complete?

You must have created an account and be logged in to MyAccount to submit an application for services under the Charities Acts 1961 and 1973.

Once you are successfully logged in, your MyAccount home page will be displayed, scroll to the end of the screen and click on the button titled ‘Charity Services’.

Then click on the relevant button to open the form.
When you have the relevant form open, if you need assistance, click on ‘Help’ to access the user guide for that form.

Q. View an application which I have already submitted online?

You must be logged into MyAccount to view your application(s).

Once you are logged in, click on ‘My Filings’ in the menu at the left of the MyAccount home page to open a list of all filings (or applications) under various heading tabs: Drafts, Signatures, Submitted, Returned, Rejected, Registered and Cancelled.

Click on the ‘Submitted’ heading to open all applications submitted. (Once an application has been completed it will appear under the ‘Registered’ heading.)

You can then download the full details of an application by clicking on download icon.
Please note - you cannot edit an application form unless it is in the ‘Drafts’ or ‘Returned’ sections.

Alternatively, you can click on the submitted heading under ‘Submission Filings’ on the dashboard to open your submission.
Q. Edit an application which has been returned to me for more information?

You must have received a message that the application has been returned to you for more information and you must be logged into *MyAccount* before you can edit it.

Once you are logged in, click on ‘My Filings’ in the menu at the left of the *MyAccount* home page to open a list of all filings (or applications) under various heading tabs: Drafts, Signatures, Submitted, Returned, Rejected, Registered and Cancelled.

Any application which has been returned to you seeking more information will be available under the ‘Returned’ tab.

Alternatively, you can click on the returned heading under ‘Submission Filings’ on the dashboard to open your submission.
To open the returned application click on the icon to make the required edits and once complete, submit the application again. (You may also need to have the Statutory Declaration sworn again, however we will advise you if this is required).

When you have the form open, if you need assistance, click on ‘Help’ to open the user guide.
Q. Upload the signed Statutory Declaration or Form or Authorisation?

Firstly, log into MyAccount then access the upload option via your dashboard, by selecting ‘pending signature’ under the ‘Submission Filings’ heading, see screen shot below.

Open the relevant submission and then click on ‘Upload Signature File’ to upload the signed documents. (If there are multiple signed documents, these must be scanned into a single PDF for upload).
Once you have uploaded the PDF of the signed document(s), click to submit the application to the Charities Regulator.

Please ensure to post the original signed Signature File (e.g. Statutory Declaration or Form of Authorisation) to the Charities Regulator: Charity Services Unit, Charities Regulator, 3 George’s Dock, IFSC, Dublin 1, D01 X5X0. An application cannot be progressed until the Charities Regulator has received the original Signature File.
Below are a set of User Guides that are also available within MyAccount. Click here to view and access them:

Annual Report - User Guide
Authorised Filer - User Guide
Change of Charity Name - User Guide
Change in Financial Year End – User Guide
Change of Purpose, Objects or other Constitution Amendment - User Guide
Charity Registration Application - User Guide
Maintain Bank Account - User Guide
Maintain Contact and Locations of Operation Details - User Guide
Maintain Fundraiser Details - User Guide
Maintain Trustees, Connections and External Advisors – User Guide
Post Primary School Registration - User Guide
Primary or Special School Registration - User Guide
S40 Deemed Registered Application - User Guide
Small Charities (Simplified) Application - User Guide

Winding Up and De-registration of a Registered Charity – User Guide


Below are a set of User Guides that are available on our website:

Applications for Consent to Sanction an Exchange of Charity Property - User Guide

Applications for Consent to a Lease of Charity Property - User Guide

Applications for Consent to a Mortgage of Charity Property - User Guide

Applications for Consent to Surrender a Lease of Charity Property - User Guide

Applications for consent to a Transfer / Sale of Charity Property Between Charities for Less than Full Value - User Guide

Application for the Approval of a Compromise under Section 22 of the Charities Act 1961 (as amended) - User Guide

Appointment of new trustees under section 43 of the Charities Act 1961 (as amended) - User Guide

Cy-Près Application - User Guide
Application for an S30 Alteration of Schemes under Educational Endowments (Ireland) Act 1885 - User Guide

Application for Opinion or Advice under Section 21 of the Charities Act 1961 (as amended) - User Guide

Applications to sanction a sale of charity property for full value - User Guide