Profile Update Process

Thank you for using ColoradoGives.org. In order for your nonprofit to continue to be featured on ColoradoGives.org and participate in Colorado Gives Day, you are required to complete the entire Profile Update Process on an annual basis. The deadline to complete the entire Profile Update Process is Friday, August 30, 2019 by 5:00 p.m. (Save date to calendar: Outlook or Google). This document outlines the aspects of the Profile Update Process and provides instructions on how to complete the Profile Update Process.

Outline of the Profile Update Process

There are three general aspects to the Profile Update Process:

1. Click on the “Mark Profile Updated” button (go to details).
2. Verify tax year 2017 information (go to details).
3. Ensure Certificates of Registration and Good Standing are both current (go to details).

Details on how to complete the entire Profile Update Process are provided below.

If you have any questions, contact us by email at cogives@CommunityFirstFoundation.org or by calling 720.898.5900. Good luck and we look forward to continuing our relationship with you well into the future.

How to Complete the Required Profile Update Process

1. Click on “Mark Profile Updated” Button

To be able to click on the “Mark Profile Updated” button:

1. Login as a nonprofit:
   https://www.coloradogives.org/admin/index.php?action=userLogin

2. Click “View Profile” button.

   ![View Profile](image-url)
3. In the Account Administration section, select the Users tab.

4. Review the current list of users and their levels of access. Edit, remove, or add users as necessary.

5. Once the list of Users is correct, check the “Update status” box at the bottom of the tab and click “Submit” in order to save the checkbox selection.

6. In the Account Administration section, select the Contacts tab.

7. Review the people who have been designated for each type of contact. Edit contact types as necessary.

8. Once the contacts are correct, check the “Update status” box at the bottom of the tab and click “Submit” in order to save the checkbox selection.
9. In the Account Administration section, select the Profile Status tab.

10. Click “Mark Profile Updated” button.

- You will not be able to click on this button until the updated boxes on both the Users tab and the Contacts tab have been checked, so if the button is greyed out, please use the “Update Checkbox Statuses” button to help you identify what checkboxes still need to be checked. If you do not click on the “Mark Profile Updated” button, then your profile will be ineligible to be listed on ColoradoGives.

- Please note that clicking this button only means you’ve verified that content is up-to-date, but you may still need to complete the other aspects of profile update process as outlined on this document in order for your profile to be considered entirely up-to-date.

Although not required, we strongly encourage you to also review and update as necessary the rest of the profile. You can use the checkboxes in the other sections and tabs to track what you have reviewed in conjunction with the “Update Checkbox Statuses” button located in the Account Administration section on the Profile Status tab to help you identify what boxes have been checked and which still need to be done.

2. Verify Tax Year 2017 Information

To verify tax year 2017 information in your ColoradoGives profile:

1. Login as a nonprofit:
   https://www.coloradogives.org/admin/index.php?action=userLogin
2. Click “View Profile” button.

3. Select the Financials section of the profile.
4. Select the Previous Fiscal Years tab.

5. Click “Edit” for the Previous Fiscal Year Start Date for 2017.¹

6. Verify numbers, select a response to the question “Did your organization conduct an audit?,” and enter any previous fiscal years comments, as necessary.

   If there is an issue with the numbers, please email cogives@CommunityFirstFoundation.org.

3. Ensure Certificates of Registration and Good Standing are Both Current

To verify current Certificate of Good Standing status:

1. Go to the Colorado Secretary of State’s Record Identification or ID Search: http://www.sos.state.co.us/biz/BusinessEntityCriteriaExt.do
2. Enter your agency’s name.
3. Click on Search.
4. Click on your agency’s ID Number.
5. You should see the word “Summary” and under that a table that says “Details,” including a row called “Status.” This “Status” should say “Good Standing” (example below):

   ![Certificate of Good Standing](image)

¹ If you do not see an entry for 2017, then upload tax year 2017 financial document(s) (e.g., 990, 990EZ, third-party audit, review, or compilation) in the Documents section on the Required Documents tab. To upload a document:

1. Select the Documents section of the profile.
2. Select the Required Documents tab.
3. Click “Add entry.”
4. Complete the required fields marked with an asterisk, including uploading the 990, 990EZ, third-party audit, third-review, or third-party compilation for tax year 2017.
5. Click “Save.”

Please note that the proper 990 has 2017 pre-printed in the upper-right-hand corner of the 990, regardless of your fiscal year.
6. If your “Status” does not say “Good Standing” or you do not see “Get a certificate of good standing” under “For this Record...” on the left side bar, then you will need to contact the Secretary of State’s office directly at 303-894-2200 & press 2 or business@sos.state.co.us to determine what you need to submit to them in order to obtain that document.

7. As one final check, if you click on “Get a certificate of good standing” under “For this Record...” on the left side bar, the year listed on the Certificate of Good Standing itself after the sentence “and by documents delivered to this office electronically through” should be in 2019.

To verify current Certificate of Registration status:

1. Go to the Colorado Secretary of State’s Search for Registered Charities and Fundraisers: https://www.sos.state.co.us/ccsa/pages/search/basic.xhtml
2. Enter your agency’s name or EIN.
3. Click on Search.
4. Click on your agency’s name in the search results.
5. In the table entitled “Charitable organization,” there is a row that states “Expires on.” The date needs to be on or after 8/15/2019 (see example below).
6. If the date is any time before 8/15/2019, then you will need to contact the Secretary of State’s office directly at 303-894-2200 & press 2 or charitable@sos.state.co.us to determine what you need to submit to them in order to have a date that is on or after 8/15/2019.

ColoradoGives Staff Review Profile

ColoradoGives staff will review your profile and verify the statuses of the Secretary of State documents to ensure the entire profile update process has been completed. Once that has been done, we will send one of two emails to the ColoradoGives Primary Contact at your organization:

1. An email confirming that your nonprofit has completed the entire profile update process successfully, and so is eligible to participate in Colorado Gives Day 2019.
2. An email outlining any aspects of the profile update process that still need to be completed.