ADLER & COLVIN

BLOG POST

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Keeping Up to Date with the California Secretary of State – Accessing the Updated Filing Portal

***UPDATE* (August 8, 2022):** Bizfile Online now allows Statement of Information filers to provide a **P.O. Box address** for corporate officers.

Last year, we posted about the need for charities formed or qualified in California to ensure their California regulatory agency filings are completed on time. We noted that California's regulatory agencies share information regarding whether entities are compliant with their filing obligations, and can impose severe consequences for lapsing. (In case you missed it, you can read that blog post **here**.)

One often-overlooked regulatory filing is the California Statement of Information, which must be filed every other year for domestic nonprofit corporations, and every year for foreign nonprofits operating in California.

In April of 2022, the Secretary of State revamped its business filings portal through which these Statements of Information are filed. In this post, we provide information and tips for accessing the State's new filing portal so that you can get your organization's Statement of Information filed on time (or catch up, as the case may be).

The Secretary of State's new portal, "bizfile Online" is located at: **https://bizfileonline.sos.ca.gov/**. You can search for and view information about your organization without logging in; however, you must set up an account and be logged in order to file a Statement of Information. Setting up an account is fairly simple, and requires only an email address and a password. Using an email address that will stay with the organization permanently may help ensure continued access over time.

After logging in to the portal, use the "Search" tab (on the left side of the screen) to locate your organization, and select its name from the results list to see status and filing options (on the right side of the screen). Select the "File Statement of Information" button, and follow the step-by-step instructions to complete the Form. If you are not logged in, the "File Statement of Information" button will not be visible.

Please note that the State now requires corporations to provide physical street addresses (P.O. Boxes cannot be inserted) for their officers, which can be the organization's address. This information will be publicly available.

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AUTHOR

Elisabeth M. Ponsano
Paralegal

ABOUT OUR BLOG

Nonprofit Law Matters looks at legal issues in the nonprofit and tax-exempt organizations world. Written by the attorneys and paralegals of Adler & Colvin, it provides updates and analysis regarding philanthropy, charity, and other exempt organization issues.

EDITORS

Stephanie L. Petit
Principal

Eric K. Gorovitz
Principal

The filing fee can be paid online with a credit card, and you will be able to download an endorsed-filed copy of the Statement of Information from within the portal under “My Work Queue.”

Within the filing portal, you may notice that your organization shows an option to “Request Access.” This refers to a ‘higher level’ of access that is only required for submitting filings that permanently affect the organization, such as changing its name, merging with another organization, or dissolving. You do not need that higher level access to file a Statement of Information. If you wish to have the higher level of access, select the “Request Access” button, and the State will mail a PIN to the organization’s last known mailing address. Once you receive the letter with this PIN (which currently takes about a week), log in to your account, click “Request Access” again, and enter the PIN. This will grant access to all filing types for your organization. This level of access will also enable you to grant access to other users.