

How to run Form 990 and CHAR 500 reports

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HelpOne can produce the figures you need for IRS Form 990 and New York Form CHAR 500 from the records you already keep: donations, expenses, restricted funds, and volunteer hours.

Steps

- Go to Reports & Insights (or Finances, then Reports).
- Open Form 990 or Form CHAR 500.
- Set the fiscal year.
- Review the totals. Drill into a line if a number looks off.
- Export or download the report for your accountant or filing.

These reports are only as good as the underlying data. Before year-end, review donations, restricted funds, expenses, and volunteer hours.

Tip: Run a mid-year 990 preview so surprises show up in July, not in filing season.