

## File your financial statements online



You can file your society's annual financial statements with the Registrar of Incorporated Societies online using the registry key.

- The registry key is case sensitive - any CAPITAL LETTERS in the key must be entered as CAPITALS and not as lower case characters.  
[Learn more about registry keys](#)
- To file online you need to have an electronic version of the financial statement - either a Microsoft Word, WordPerfect, Excel or PDF file.
- You do not need to be a registered user to file financial statements but it can speed things up if you are filing several documents online. If you have not logged on as a registered user, a 'Logon' screen will be displayed - simply select Continue to proceed as a casual user.
- If you need to file financial statements for more than one year, please submit one statement using the steps below and then repeat those steps to file a statement for a different financial year.

## View an animated demonstration



This step-by-step visual guide runs you through the process of filing a financial statement online.

[Play the demo now!](#)

## The steps to filing a financial statement online

1. Select Maintain Organisation Details - File A Financial Statement from the menu on the left of the screen.
2. If this is the first time you are using this service in this session, a help screen will be displayed. Select OK to continue.
3. If you know the organisation number enter it on the next field. To find the organisation number use the Locate Organisation button to search for and select the organisation number.

Select Continue to display the 'Your Contact Details' screen.

- If you are a casual user (that is, not logged on) enter your contact details.
- If you logged on as a registered user these details will already have been entered for you. Check your phone, fax and email details and edit them if required.
- If you want the system to save your contact details for the rest of this session (which is useful if you are going to file more documents online now), put a tick in the box next to Save contact details for this session.

5. Select Continue.
6. Enter the registry key for your society and then select Continue to display the [Top](#) 'Submitted Financial Statement' screen.
7. Enter the date that the financial statement was submitted to and approved by the members of the society - often this will be at the Annual General Meeting. Please use the date format dd/mm/yyyy e.g. 31/03/2008.
8. Use the pick list to select the year for which the financial statement is being filed. For example, if the financial year was for April 2007 to March 2008, select 2008.
9. Your name should already have been entered into the Name field from the 'Your Contact Details' screen. Enter your role in the society in the Position field (for example, Secretary or Treasurer).
10. To upload the financial statement:
  - Select the Upload Statement button.
  - Click on the Browse... button to locate the document on your PC you wish to upload.
  - Click once to select the document then click the Open button.
  - Select the Upload button to upload the document you have selected.
  - Preview the document you have uploaded. This step helps to ensure that you have selected the right file. If you find that you have uploaded the wrong document, choose the Upload Statement button to replace this with the correct financial statement.
11. Select Submit Changes and your financial statement will be uploaded automatically and you will see a confirmation screen once this is done. To print a copy of this confirmation screen select [Ctrl] + [P] on your keyboard.

The uploaded financial statement can be viewed online straight away. To see it for yourself, carry out a Register Search on the website then select the document from the Documents Registered section of the search result. You will also see a separate document called the Financial Statement AGM Details - this online document contains the details of who uploaded the financial statement and the date that the statement was approved by the members.



[File a financial statement now \(remember you will need the registry key\)](#)