

**An Rialálaí
Carthanas**

**Charities
Regulator**

User Guide – Primary Schools

INTRODUCTION

The **Charities Regulator** is Ireland's national statutory regulatory agency for charitable organisations. Under the Charities Act 2009, all Primary Schools in Ireland are required to apply for registration with the Charities Regulator (CRA).

The CRA, working in partnership with the Department of Education and Skills has streamlined the process for the registration of Primary Schools. This user guide will provide you with details of all of the information which is required from Primary Schools in order to complete the application for charitable status.

WHY DO PRIMARY SCHOOLS NEED TO REGISTER?

Primary Schools come within the terms of the Charities Act 2009, as they fall within the definition of an 'education body' in the Act and, as such, are legally required to apply for inclusion on the Register of Charities.

WHEN IS THE DEADLINE FOR APPLICATIONS?

The Charities Regulator encourages all schools to submit their application as soon as possible.

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Some important information about using the website

Application for Inclusion on the Register (Draft)

Welcome to the Charities Regulatory Authority application screens where you can complete and submit your application for inclusion on the public Register of Charities.

This first screen covers basic information about your school.

Required fields are denoted by an * and are in red.
Most fields have help text associated with them which can be seen by placing the cursor over the ? symbol.
The Eye symbol indicates that the field will appear in the public Register of Charities.

Roll Number: ? 98777M

Name: ? Primschool Uat #6

Any other names: ?
Test Primary School
Test National School
Test NS

Status: ? Draft

What type of organisation is your school? ? Board of Management (Primary School)

Does your school have a Parents' Association? * ? ☐ Yes ☐ No

Does your school have a School Council? * ? ☐ Yes ☐ No

Date Established (DD/MM/YYYY): * ?

End of Reporting Year (day and month): ?



While application should be possible on all internet browsers, it is recommended to use Google Chrome to complete the process.

Red*

Any fields in **Red** with * are required to be completed.



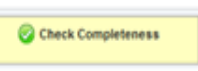
Move your mouse over any help symbols for further information.



The eye symbol indicates that information provided will appear on the public register of charities on the application has been approved by the Charities Regulatory. Authority.



The Save button allows you to save your progress and return at a later stage to complete.



Check Completeness will inform you of remaining required fields that must be completed before the application can be submitted.

Create a Charity Account

The first step in the process is to create a charity account.

An email was issued to the email address of all Primary Schools held by the Department of Education and Skills in March, 2016. This email contains a PIN Code necessary to create the charity account.

If you are a primary school and did not receive an email from the Charities Regulator please submit a query through our website requesting a reissuance of the PIN email. Please include school roll number and email address for your Primary School - www.charitiesregulatoryauthority.ie

Create an account for your charitable organisation

***To create an account you must have received an email from the Charities Regulator containing a PIN Code.**

****If you have already created a charity account please proceed to Page 6 – Log into your Charity Account.**

The screenshot shows the 'Create Your Charity Account' form. At the top left is the Charities Regulatory Authority logo. At the top right is contact information: St. Martin's House, Waterloo Road, Dublin 4, Phone: +353-1-633 1500, Email: info@charitiesregulatoryauthority.ie, Website: www.charitiesregulatoryauthority.ie. The main heading is 'Create Your Charity Account'. Below it, instructions state that a PIN code is required and direct users to 'WHAT WE DO - Registering Charities' and 'YOUR CHARITY - Apply for account' sections. A red note says 'Please note all fields marked with * must be completed.' The form has several sections: 'Security Information' with a PIN code field; 'Charity Login Details' with email address and password fields (password requirements: at least 9 characters, one uppercase, one lowercase, one number, one special character); 'Details of person completing this screen' with first and surname fields; 'Text Verification' with a captcha image showing 'ayc5y'; and 'Terms and Conditions' with a checkbox to accept terms. A 'Submit' button is at the bottom left.

- On the www.charitiesregulatoryauthority.ie homepage click on **“Create Charity Account”**
- Enter the **Access PIN Code** provided in the PIN email from the Charities Regulator.
- Enter a **username** – ***your username must be a valid email address.**
- Enter a **password** – ***your password must be a minimum of 9 characters and include (1) a capital letter (2) a lower case letter (3) a number & (4) a special character.**
- Confirm your agreement to our terms and conditions ***please read our Terms and Conditions before agreeing & complete the Text Verification**
- Press the **“submit”** button to create your charity account

After you create your charity account you will receive an email from the Charities Regulator confirming the account creation and activation. This can take up to 24 hours. Once you receive this confirmation email you can proceed to login to your school's account and complete the required information.

Log into your Charity Account



Charities Regulatory Authority
St. Martin's House
Waterloo Road, Dublin 4
Phone: +353-1-633 1500
Email: info@charitiesregulatoryauthority.ie
Website: www.charitiesregulatoryauthority.ie

Log into your Charity Account

If you don't have a Charity account login then you will need to apply for and create one.
Please go back to the main CRA website YOUR CHARITY tab to see how to do this.

Please note all fields marked with * must be completed.

Charity Login Details

Please enter your email address and password.

User name(email address)*:

Password*:

Terms and Conditions

Please accept these [terms and conditions](#). By accepting these [terms and conditions](#) you verify that you are legally entitled to represent the above charity and that all information given above is true and correct.

* ☐ I accept [these terms and conditions](#)

If you have recently reset your password you may not be able to login because the system hasn't completed updating our databases with your new password. The process can sometimes take several hours mainly due to the security included in the system so please be patient.

Log In

[Forgotten your charity password?](#) | [Forgotten your charity username?](#)

[Click here to change your charity password](#) | [Click here to unlock your charity account](#)

To log into your charity account, please click the **Log In** button on our homepage
www.charitiesregulatoryauthority.ie

- Enter your **username** – *your username must be the valid email address used to create your charity account.
- Enter your **password** – *your password must be the password used when creating your charity account. It must be a minimum of 9 characters and include (1) a capital letter (2) a lower case letter (3) a number & (4) a special character.
- Confirm your agreement to our terms and conditions *please read our **Terms and Conditions** before agreeing
- Click the “log in” button

*If you have forgotten your password, you can reset via the log in screen.

Charity Details

Save

Check Completeness

Submit Application...

Open Print View

Charity Details

Charitable Purpose

Address

Board of Management

Declaration

Application for Inclusion on the Register (Draft)

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This first screen covers basic information about your school.

Required fields are denoted by an * and are in **red**.
Most fields have help text associated with them which can be seen by placing the cursor over the ? symbol.
The Eye symbol indicates that the field will appear in the public Register of Charities.

Roll Number: ?	98777M	Eye
Name: ?	Primschool Uat #6	
Any other names: ?	<div>Test Primary School Test National School Test NS</div>	Eye
Status: ?	Draft	Eye
What type of organisation is your school? ?	Board of Management (Primary School)	Eye
Does your school have a Parents' Association? * ?	<input type="radio"/> Yes <input type="radio"/> No	
Does your school have a School Council? * ?	<input type="radio"/> Yes <input type="radio"/> No	
Date Established (DD/MM/YYYY): * ?	<input type="text"/>	
End of Reporting Year (day and month): ?		

- Input any other **names** that your primary school uses or is known by.
- Confirm if your school has a Parents' Association.
- Confirm if your school has a School/Student Council.
- Confirm your schools Date of Establishment (you can type the date of establishment in the format DD/MM/YYYY)

Red = Required Fields

Black = Optional Fields

Charitable Purpose

Save

Check Completeness

Submit Application...

Open Print View

Charity Details

Charitable Purpose

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Charitable Purpose and Objects

Your charity's purpose and objectives must be consistent with your governing document and you will have to report against those selected on an annual basis.

If your charity was registered with the Revenue Commissioners (i.e. with a CHY number) on 16th October 2014 you must select the Charitable purpose as approved by the Revenue Commissioners.

Charitable Purpose: * ?

☐ Relief of poverty or economic hardship

☒ Advancement of education

☐ Advancement of religion

☐ Other purpose that is of benefit to the community

Charitable Objects: * ?

Section 9 of the Education Act, 1998

9.—A recognised school shall provide education to students which is appropriate to their abilities and needs and, without prejudice to the generality of the foregoing, it shall use its available resources to—

(a) ensure that the educational needs of all students, including those with a disability or other special educational needs, are identified and provided for,

(b) ensure that the education provided by it meets the requirements of education policy as determined from time to time by the Minister including requirements as to the provision of a

- Charitable Purpose**

You must select at least one charitable purpose, as defined by the Charities Act 2009. The charitable purpose “Advancement of education” has been pre populated by the CRA;

1. Relief of poverty or economic hardship
2. Advancement of education
3. Advancement of religion
4. Other purpose that is of benefit to the community

- Charitable Objectives**

For Primary Schools, in agreement with the Department of Education and Skills your charitable objectives have been pre-populated as per Section 9 of the Education Act, 1998.

Red = Required Fields

Black = Optional Fields

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Address

Charity Details

Charitable Purpose

Address

Board of Management

Declaration

Save

Check Completeness

Submit Application...

Open Print View

Address and Contact Details in Ireland

As well as a Principal address and a Correspondence address please provide the address of each premises in Ireland at which your charity operates or carries on its activities (Section 39 (5)).

Principal address - Your charity's principal office details must be in Ireland or another EEA state. This should be the address from which your operations are managed. If your charity does not have a principal address in Ireland, enter your principal address elsewhere. This cannot be a PO Box or similar, it must be a physical address. Only one (1) principal address is allowed.

Correspondence address - Please enter an address for correspondence; it can be the same as your principal address and it can be a PO Box or similar. This will be the address we use to send letters and documents not sent in emails or that can be found on our website. Only one (1) correspondence address is allowed.

All addresses will appear in the public register unless indicated otherwise.

To edit an address just click on it.

+ Add an Address

Previous1Next

Principal Address

Castlebar
NS
CO MAYO
Mayo
Ireland

Correspondence Address

Castlebar
NS
CO MAYO
Mayo
Ireland

- Principal address (School Address)**

Please enter your school's physical address here. This must be a physical address and cannot be a PO Box address.

- Correspondence address**

Please enter your correspondence address here. Your correspondence address can be the same or different to your school's address. This can be a PO Box or similar. This will be the address we use to send written correspondence to your school.

To add an address - click the “+ Add an Address” button

To change or delete an existing address click the box containing that address

Red = Required Fields

Black = Optional Fields

Board of Management

Save Check Completeness Submit Application... Open Print View

Charity Details

Charitable Purpose

Address

Board of Management

Declaration

Board of Management

All members of the Board of Management must be entered here.

Please supply details of your school's current Board of Management.

If the school has a required minimum number of members on the Board of Management please enter it at **Minimum: *** below.

You must confirm that each member of the Board of Management is eligible, under Section 6(a) of the Governance Manual for Primary Schools 2015-2019, to be a member of a Board of Management.

Required fields are denoted by an * and are in **red**.
Most fields have help text associated with them which can be seen by placing the cursor over the ? symbol.

Note: Three pieces of information about each member of the Board of Management are made public in the Register of Charities: name, position type and start date. This information will usually appear on the public register after 24 hours.

Minimum: * ?

Maximum: ?

+ Add Appointee

Previous 1 Next

Byrne, David
Member of Management Board
Since 08-Feb-2016
Trustee

Doe, John
Member of Management Board
Since 02-Feb-2016
Trustee

Fahey, Brid
Member of Management Board
Since 01-Feb-2016
Trustee

Grey, Pat
Member of Management Board
Since 17-Feb-2010
Trustee

Williams, Paul
Member of Management Board
Since 02-Feb-2016
Trustee

- Select the (1) **minimum** and (2) **maximum** number of members of the Board of Management for your school. If there is no minimum requirement please leave this field pre-populated as "1".
- You must enter details of all of the current members of the Board of Management. To add a member - click the "+ Add Appointee" button and complete the required information (Name, position type, start date, home address).

Please note that all members of the Board of Management must not be disqualified, under Section 55 of the Charities Act 2009 from being a trustee of a charitable organisation. This includes;

- (a) is adjudicated bankrupt
- (b) makes a composition or arrangement with creditors
- (c) is convicted on indictment of an offence
- (d) is sentenced to a term of imprisonment by a court of competent jurisdiction
- (e) is the subject of an order under section 160 of the Companies Act 1990 or is prohibited, removed or suspended from being a trustee of a scheme under the Pensions Acts 1990 to 2008
- (f) has been removed from the position of charity trustee of a charitable organisation by an order of the High Court under *section 74*.

The **name, position type and start date** of members of the Board of Management are published on the Public Register of Charities.

Red = Required Fields

Black = Optional Fields

Declaration

Charity Details

Charitable Purpose

Address

Board of Management

Declaration

Save

Check Completeness

Submit Application...

Open Print View

Declaration

To submit your school's application for charitable status you must TICK the box below confirming that:

1. You are authorised on behalf of the school to make this application.
2. The schools information is up to date (board of management, addresses etc.).
3. The information provided in the application is true and accurate.
4. You have read and understood section 39(15) of the Charities Act 2009, which is as follows: *"A person who, in purported compliance with this section, knowingly or recklessly provides information or a particular to the Authority that is false or misleading in a material respect, or who believes any such information or particular when provided by him or her, in purported compliance with that subsection, not to be true, shall be guilty of an offence."*

?

☐ I confirm my charity's details are correct and complete *

To complete your school's application you must complete the declaration. By ticking the box you are confirming;

1. You are authorised on behalf of the school to make the application.
2. The school's information is up to date (board of management / addresses etc.)
3. The information provided in the application is true and accurate.
4. You have read and understood section 39(15) of the Charities Act 2009.

"A person who, in purported compliance with this section, knowingly or recklessly provides information or a particular to the Authority that is false or misleading in a material respect, or who believes any such information or particular when provided by him or her, in purported compliance with that subsection, not to be true, shall be guilty of an offence."

- Once satisfied with 1-4 above please click on **"Submit Application"**.
- Following submission of your application it will be reviewed by the Charities Regulator.
- Once your application for charitable status is approved, you will receive a notification by email and your schools information will be displayed on the Public Register of Charities.

On-going Maintenance

Charity Details

Welcome to your charity's home/overview page.

It is from this page you should be able to view and maintain all your charity's details.

At the top of these page you will see your charity's number and name with an indication of where you are in the system. In this case the Overview or Home page.

In the **Charity Details** section you will see summary details of your charity below which there is a button for maintaining your charity's details, such as trustees, addresses, etc. Below this section there is the **Annual Reporting** section where you can see details of your charity's Annual Reports.

Name:	Primschool Uat #6
Status:	Registered - This charity is registered with the CRA.
Registered Charity Number (CRA Number):	20000387
Date Established:	1 Jan 1885
Country where your Charity was established:	
Governing Form:	Board of Management (Primary School)



Maintain Charity Details



View Full Details

Following Registration - The Charities Regulator allows schools to maintain some of their details on the online register. The editable information includes;

1. Address
2. Members of the Board of Management

From the Overview screen click on **“Maintain Charity Details”**.

Some of the information is not editable. If you wish to edit information in restricted fields, please submit a query through our website www.charitiesregulatoryauthority.ie

Contact us

Contacting the CRA

The Charities Regulator has a dedicated customer service team to support you in completing your school's application for charitable status. Our customer service team can be contacted by:

- Our online query system: www.charitiesregulatoryauthority.ie
- Email: info@charitiesregulatoryauthority.ie
- Helpline: 01-633 1500 (available Mon – Fri from 1pm – 5:30pm)