

OneStop Applicant Guide - Solicitors

Maryland Office of the Secretary of State

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Introduction

This is a comprehensive guide for those who wish to apply to be a registered solicitor in the State of Maryland or those who have existing records with the Maryland Office of the Secretary of State. This guide provides instructions on all related applications, both public and restricted, and all the information you will need to keep your solicitor registration in good standing in the State of Maryland.

[Please click here](#) to access the Maryland OneStop Homepage. When you're logged into OneStop you can access the help widget to find this information as well.

Claiming Records

If a record is created in the system on a solicitor's behalf, an automated email will go out to the identified record holder email address to claim the record. You will need to login with that email address and associate the record with an entity account in order to manage the record.

1. Click on the Claim Records button in the automated email or navigate to onestop.md.gov and login using the email address.

- a. If you have not created a OneStop account with the email address yet, you will need to first create your account using the Register button.
2. You can navigate to the Claim Records page by clicking the button in the automated email or selecting your name in the upper right corner and clicking Claim Records
3. You will need to select an entity with which to associate the record. You can either select an existing entity you have created previously or you can choose to create a new entity.
 - a. **PLEASE NOTE:** You must create an entity account to own the record that has been created. You can create a single generic entity to house all records you manage or you can create separate entities for each record you may own.



Welcome

Charity Account

Information has been entered on your behalf in the OneStop portal. A new SOS Charity Organization (MASTER) record has been created for your account.

Claim this SOS Charity Organization (MASTER) record by clicking the "Claim Record" button below.

[Claim Record](#)



Licenses and Permits

My Dashboard

CA Charity ^

Welcome to the Maryland OneStop Portal

OneStop is the central hub for Maryland State licenses, forms, certificates, permits, applications, and registrations.


Search for licenses and permits...

Account Settings
[Claim Records](#)
Switch Accounts Log out



Claim Records

Select an entity or create a new entity to claim the following records

 Entity Records

NAME	NUMBER	CREATED ON	NOTES	ENTITY
NEW TEST RECORD	49706	08/22/22 at 9:28 am	--	Select an Entity ^ Entity Testing Solicitations Incorporated Solicitor Test Entity Create an Entity


[← Back to homepage](#)

Completing the Solicitors Registration

Before you can complete the solicitor registration application, you must be logged into Maryland OneStop on your organization's entity account. If you are unsure how to login or create an account, please use the OneStop Accounts Guide. You can also search for this information in the Help widget when you are logged in.

1. Accessing the Profile Page


- a. There are two ways to navigate to the Solicitor Registration Public Profile Page
 - i. [Click Here](#) to navigate to the profile page
 - ii. Go to onestop.md.gov and use the search bar or the Maryland Secretary of State agency tag to locate the **SOS Solicitor Registration Form**

 [Licenses and Permits](#) [Entity's Dashboard](#) JD Joe ▾

Welcome to the Maryland OneStop Portal

OneStop is the central hub for Maryland State licenses, forms, certificates, permits, applications, and registrations.


SOS Solicitor Registration Form



Professional

Browse professional licenses and permits for individuals.


[Browse](#)



Organizational

Browse licenses and permits for business use.

[Browse](#)



Personal

Browse licenses, permits, and certification for personal use.

[Browse](#)

Browse by State Agencies

[Help](#)

Browse by State Agencies

Maryland State Department of Education 9 Applications Available	Maryland Secretary of State 3 Applications Available
Maryland Medical Cannabis Commission 1 Application Available	Maryland Higher Education Commission 9 Applications Available
Maryland Department of Transportation 6 Applications Available	Maryland Department of State Police 1 Application Available
Maryland Department of Environment 3 Applications Available	Maryland Department of Assessments & Taxation 4 Applications Available
Department of Labor	Help

[Licenses and Permits](#)

[Entity's Dashboard](#)

JD Joe ▾

1 result match your search for **SOS Solicitor Registration Form**

[SoS Solicitor Registration Form](#)

Distributed by Office of the Secretary of State

Registration application for a Professional Solicitor, Fund-Raising Counsel, and Public Safety Solicitor

[View Details](#)

1 - 5 day approval

\$100.00 - \$350.00

- b. You are now on the Public Profile page for the Solicitors initial registration application. This page provides helpful details and information about the application and approval process; ensure that you review it in full before clicking “apply now” and completing the application

2. Completing the Application

- a. This application is a fully custom solution that incorporates all possible registration outcomes in a single form. You will be asked to provide certain information based on your organization’s purpose and service type. Answer each question carefully and complete all required fields.
- b. If you are not eligible to complete the application or you have not provided a correct response when you select submit, the application will not allow you to proceed until you have addressed the fields highlighted in red. If there are no errors with your application, please only click “Submit” once and wait to be directed to your payment step if there is a fee associated with your application.
- c. All fees will now be submitted online via OneStop and you must use a credit card to complete the payment. If you have any questions or concerns about payment, please contact the SoS Division of Charity Management at dlcharity_sos@maryland.gov
- d. Once you have submitted the application and any required payment, you will receive a confirmation email that your application has been submitted. The SoS Charity Officers will also be notified of your submission and will review and process your application in due course.

The Approval Process

Once your application has been submitted, SoS Charity Officers will review your submission for completeness and validity.

1. If everything is in order, SoS will approve your application and you will receive an automatic notification from the system. At that point you will have a record associated with your OneStop account and you can use the [Navigating your Solicitor Record](#) section of this guide to familiarize yourself with your new record.
 2. If revisions are required, you will receive a notification from OneStop outlining the revisions that the SoS staff require for approval of your application. You will then be able to resubmit your application for review after the changes have been made.
 - a. This revision process may require several rounds of changes depending on the situation. If you have any questions about your revisions process that are not answered here, please reach out to dlcharity_sos@maryland.gov
 3. Throughout the approval process, you will receive automatic email notifications from the OneStop system. Make sure these emails are not going into your spam folder. You may receive additional communications from SoS Charity Officers from their official Maryland email addresses regarding your application.
-

Navigating your Solicitor Record

Once your application is approved, your organization will have a new record in OneStop where you will go to complete additional forms related to your organization and make updates to your registration as needed. This section provides information on navigating to your record and the actions you can take from your record. You will not be able to access all of these actions if your organization becomes delinquent in registration or if your application is still pending approval from SoS.

1. Navigating to your Dashboard

- a. Login to [OneStop](#) and switch to the appropriate Entity account
 - i. As a reminder, you can click on your name in the upper right corner and select “Switch Accounts” to change to a different Entity account
- b. In the upper right corner of the page, select the tab labeled “Entity’s Dashboard”
- c. Once you are in your Entity’s Dashboard, scroll to the bottom of the page where you will find the section labeled “[Your Entity Name]’s Licenses, Permits, & Registrations”
- d. Click on the hyperlinked solicitor ID number in the leftmost column of the table
- e. You are now in your solicitor record
- f. In your record, you will have 3 tabs: General Information, Solicitor Details, and Historical Information
 - i. In General Information you will find: your organization’s contact details
 - ii. In Solicitor Details you will find: lists of Contracted Charities, Fundraising Notices, Officers, Individuals with Financial Interest, and Government Actions
 - iii. In Historical Information you will find: links to applications submitted via OneStop and lists of payments in OneStop

Maryland OneStop

Licenses and Permits Entity's Dashboard JD Joe

Welcome to the Maryland OneStop Portal

OneStop is the central hub for Maryland State licenses, forms, certificates, permits, applications, and registrations.

Search for licenses and permits...

J. Doe Fundraising's Licenses, Permits, & Registrations

SoS Solicitor Registration Record

UNIQUE ID	EXPIRATION DATE	CURRENT STATUS
PS3720	August 8, 2023	Registered

SOS Solicitor Detail View

Home > My Dashboard > **SOS Solicitor Detail View**

SoS Solicitor Record for J. Doe Fundraising

Actions ▾

General Information

Solicitor Details

Historical Informat...

General Information

2. Taking Actions on your Record

- a. You can take several actions on your record. In order to take any of these actions, you must select the Actions dropdown menu at the top of your record
- b. Each action will help you to manage your registration in the state of Maryland
 - i. **Edit:** allows you to update some of your contact information included in the General Information tab of your record
 - ii. **Generate Certificate:** allows you to download a PDF of your most recent certificate of registration. You will not be able to access historical certificates so make sure you download and save a copy of your certificate for your records
 - iii. **Complete Renewal Application:** allows you to submit your annual renewal up to 3 months before your registration expiration date, which can be found in your Dashboard using the steps above in [Navigating to your Dashboard](#). For more information on submitting your annual renewal, reference the [Submitting your Annual Update](#) section of this guide.
 - iv. **Submit a Fund-Raising Notice (Professional Solicitor Only):** allows you to submit new, mid-year Fund-Raising contracts to the state of Maryland. Any new contracts your organization receives between Annual Updates must be submitted via a Mid-Year Fund-Raising Notice.
 - v. **Submit a Final Accounting Report (Professional Solicitor Only):** allows you to close out any ongoing fund-raising contracts and notify the State of Maryland of the end of a fund-raising campaign.
 - vi. **Submit New Contracts (Fund-Raising Counsel and Public Safety Solicitor Only):** allows you to submit new, mid-year contracts to the state of Maryland. Any new contracts your organization receives between Annual Updates must be submitted via a New Contract form.
 1. **Public Safety Solicitors are required to pay a fee of \$100 per reported contract.**

SOS Solicitor Detail View

[Home](#) > [My Dashboard](#) > [SOS Solicitor Detail View](#)

SoS Solicitor Record for J. Doe Fundraising

[General Information](#)

[Solicitor Details](#)

[Historical Informat...](#)

Actions ▾

General Information

SOS Solicitor Detail View

[Home](#) > [My Dashboard](#) > [SOS Solicitor Detail View](#)

SoS Solicitor Record for J. Doe Fundraising

[General Information](#)

[Solicitor Details](#)

[Historical Informat...](#)

Actions ▲

Edit
 Submit a Renewal Application
 Generate Certificate
 Submit a Fund-Raising Notice

General Information

Submitting a Fund-Raising Notice (Professional Solicitor Only)

If your organization signs new fund-raising contracts between annual updates with the state of Maryland, you are required to submit those notices via your record. Reference the [Navigating your Solicitor Record](#) section of this guide to find instructions on accessing your organization's record.

1. Completing and Submitting the Online Form

- a. Select Submit a Fund-Raising Notice from the Actions dropdown in your Professional Solicitor Record
- b. Review the form, some of the pre-populated fields will be editable (i.e. organization address), and some will not be (i.e. expiration date, solicitor ID)
- c. Complete all required fields and upload all required documents
- d. Select "Submit" at the end of the form
- e. Once you have submitted the application, you will receive a confirmation email that your application has been submitted. The SoS Charity Officers will also be notified of your submission and will review and process your application in due course.

SOS Solicitor Detail View

Home > My Dashboard > **SOS Solicitor Detail View**

SoS Solicitor Record for J. Doe Fundraising

General Information

Solicitor Details

Historical Informat...

Actions ^

- Edit
- Submit a Renewal Application
- Generate Certificate
- Submit a Fund-Raising Notice

General Information

SoS Professional Solicitor Fund-Raising Notice Form

Print



Fund-Raising Notice for Professional Solicitors

A Fund-Raising Notice is required to be filed by a professional solicitor before starting a public solicitation. See Maryland Solicitations Act, Business Regulation Article, 6-502.

Professional Solicitor ID

PS3720

Professional Solicitor Name

J. Doe Fundraising

Help

Submitting a Final Accounting Report

1. Completing and Submitting the Online Form

- a. Navigate to the Solicitor Details tab of your solicitor registration record
- b. Click the "Submit Final Accounting Report" button next to any appropriate Fund-Raising Notice
- c. Complete all required fields and upload all required documents
- d. Select "Submit" at the end of the form
- e. There is no fee associated with the Final Accounting Report

Submitting your Annual Update

Your organization is required to submit an annual update of your registration in order to continue soliciting in the state of Maryland. The annual update form has been modernized so that it will now auto-populate some

information on the form with data from your existing record. Please carefully review the auto-populated data for accuracy, and please update any information that may have changed over the course of the year. Use the steps in the [Navigating your Solicitor Record](#) section of this guide for steps to access the Annual Update form.

1. Completing and Submitting the Online Form

- a. Select Submit a Renewal Application from the Actions dropdown in your Solicitor Record
- b. Review the form; some of the pre-populated fields will be editable (i.e. organization address), and some will not be (i.e. expiration date, solicitor ID)
- c. Complete all required fields and upload all required documents
- d. Select "Submit" at the end of the form
- e. If there is a fee associated with your application, you will be directed to a payment step
- f. All fees will now be submitted online via OneStop and you must use a credit card to complete the payment. If you have any questions or concerns about payment, please contact the SoS Division of Charity Management at dlcharity_sos@maryland.gov
- g. Once you have submitted the application and any required payment, you will receive a confirmation email that your application has been submitted. The SoS Charity Officers will also be notified of your submission and will review and process your application in due course.

The screenshot shows the 'SOS Solicitor Detail View' page for 'J. Doe Fundraising'. The page has a green header with the title 'SOS Solicitor Detail View'. Below the header is a breadcrumb trail: 'Home > My Dashboard > SOS Solicitor Detail View'. The main content area is divided into two sections. The top section is titled 'SoS Solicitor Record for J. Doe Fundraising' and contains three tabs: 'General Information' (selected), 'Solicitor Details', and 'Historical Informat...'. An 'Actions' dropdown menu is open, showing options: 'Edit', 'Submit a Renewal Application' (highlighted), 'Generate Certificate', and 'Submit a Fund-Raising Notice'. The bottom section is titled 'SoS Solicitor Renewal Form' and has a 'Print' button. The form itself features the Maryland State Seal at the top, followed by the text 'Maryland Office of the Secretary of State Solicitor Renewal Form'. Below this, there are two input fields: 'Solicitor ID' with the value 'PS3720' and 'Solicitor Name' with the value 'J. Doe Fundraising'. At the bottom of the form, there is a note 'Check the one that applies' and a 'Help' button.

Maryland OneStop Licensures and Permits Entity's Dashboard JD Joe

SOS Solicitor Detail View

Home > My Dashboard > SOS Solicitor Detail View

SoS Solicitor Record for J. Doe Fundraising

General Information Solicitor Details Historical Informat...

Actions

- Edit
- Submit a Renewal Application
- Generate Certificate
- Submit a Fund-Raising Notice

SoS Solicitor Renewal Form

Print



Maryland Office of the Secretary of State Solicitor Renewal Form

Solicitor ID PS3720 Solicitor Name J. Doe Fundraising

Check the one that applies [Help](#)

Accessing the Public List View (list of solicitors)

- There is a publicly available list of registered solicitors and their status that can be accessed [via OneStop](#).
- If you would like to provide the link to this page to your donors or other stakeholders, please copy this link: https://onestop.md.gov/list_views/62f3e1867f7e3200016a7772
- This list will be automatically updated with the most recent fiscal year data that you submit via OneStop. If you see an error on this list, please contact the SOS Charities Office at dlcharity_sos@maryland.gov.