

How to Create a Business Checklist and Save your Progress

Purpose: Use this guide to create a business checklist and link it to a business profile. Linking a checklist to a business profile activates the checklist progress status bar and allows you to save your checklist progress. **NOTE:** There are two possible scenarios described below when starting a Business Checklist. Be sure to follow the steps associated with your specific scenario.

Scenario 1: Creating a checklist without an active business profile in My Business(es).

- Follow these steps if you want to create a checklist and you do not yet have an active business profile in *My Business(es)*. Completing these steps will also create a new business profile.

Scenario 2: Creating a checklist linked to an active business profile in *My Business(es)*. (Skip to Page 8).

- Follow these steps if you want to create a checklist for a business profile that is already active in *My Business(es)*.

Scenario 1: Creating a checklist without an active business profile.

Step 1: Go to <https://hub.business.pa.gov>. Enter your username and password in the appropriate form fields. Click the *Log in* button. New users should register for an account by clicking the *Register* button on the right. [Click here](#) for additional assistance with registering as a new user in the Hub. **NOTE:** The Business Hub utilizes Keystone Login. If you have an existing Keystone Login from another Commonwealth system associated with your email address, use your existing information to *Log in*.

PA Business One-Stop Shop

[Feedback](#) [FAQs](#) [Help](#)

If you have a Keystone Login username and password, please use it below. If not, you will need to create one. Please do not use your PENN File credentials on this page, you will be given the opportunity to link your new Keystone Login to your PENN File account once your Keystone Login has been created.

Login to your account

Register a new account

Username

Password

Keystone Login is an account management system for commonwealth online services. You can use your Keystone Login username and password to log into any online service that participates in Keystone Login.

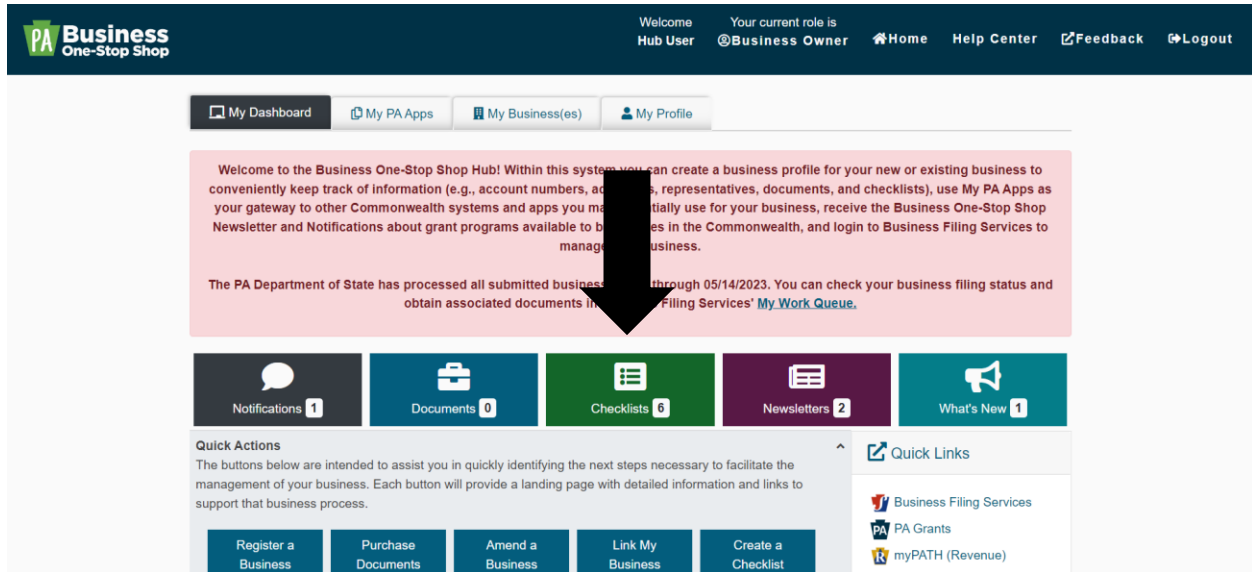
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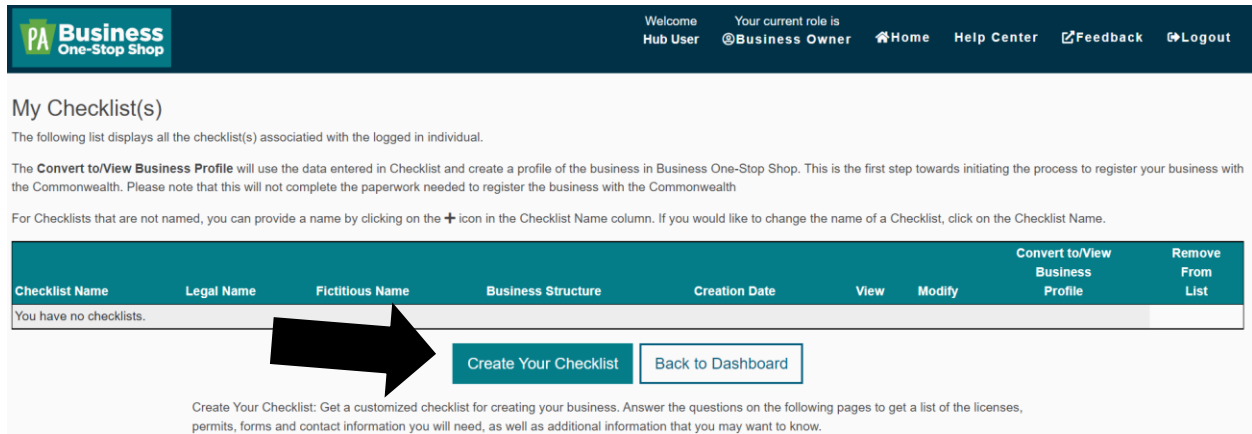
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Step 2: Click the *Checklists* button.



Step 3: Click the *Create Your Checklist* button.



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Step 4: The dropdown menu defaults to *Create a new checklist*. Type a name for your checklist in the form field. Then, click the *Get Started* button.

The screenshot displays the PA Business One-Stop Shop interface. At the top, there is a dark blue header with the logo. Below the header, three icons represent the steps: a pencil for 'Answer questions', an hourglass for 'It takes about 5-7 minutes', and a checklist for 'Get your custom checklist'. Each step has a brief description. Below these steps, a paragraph explains how to create a checklist for an existing business profile. The main form area includes a dropdown menu set to 'Create a new checklist', a text input field containing 'Checklist One', and a teal 'Get Started' button. Two large black arrows point towards the 'Get Started' button, one from the left and one from the right.

Answer questions
You will be asked basic questions about your business.

It takes about 5-7 minutes
It's easy!

Get your custom checklist
Find the requirements that matter to your business.

If you would like to create a checklist for an existing business profile, you can select the existing business from the dropdown. While creating the checklist, details from the existing business profile will be used to pre-populate some questions within the new checklist. If you choose to change any of the existing checklist information, you will also need to manually update the original business profile. **NOTE:** If your business is already registered with another Commonwealth agency, please remember to make your changes in that agency system as well.

Please select *Create a new checklist* or select an existing business profile from the dropdown menu to proceed:

Create a new checklist

Provide name for the checklist: Checklist One

Get Started

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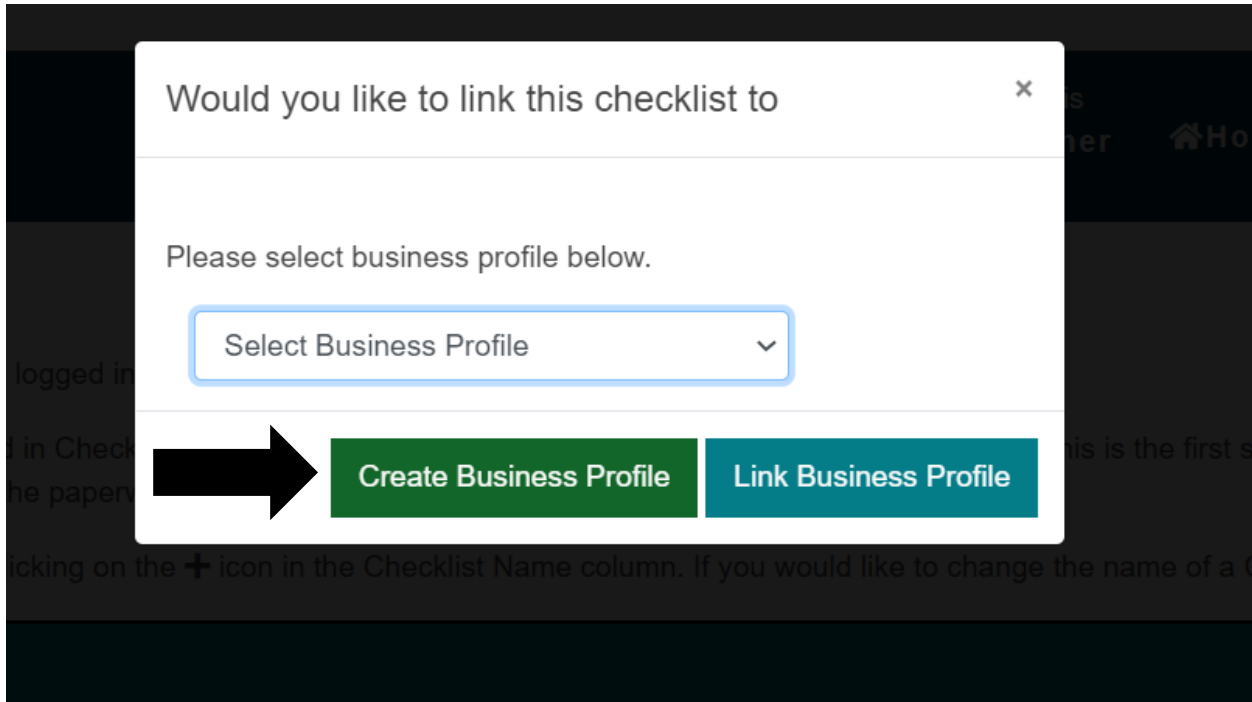
Step 5: Complete the screens as required to generate a Business Checklist. After the checklist has been generated, click the *Save and Close* button.

Step 6: From the *My Checklist(s)* screen, you should now see your recently completed checklist. Click the *Convert to Business Profile* icon.

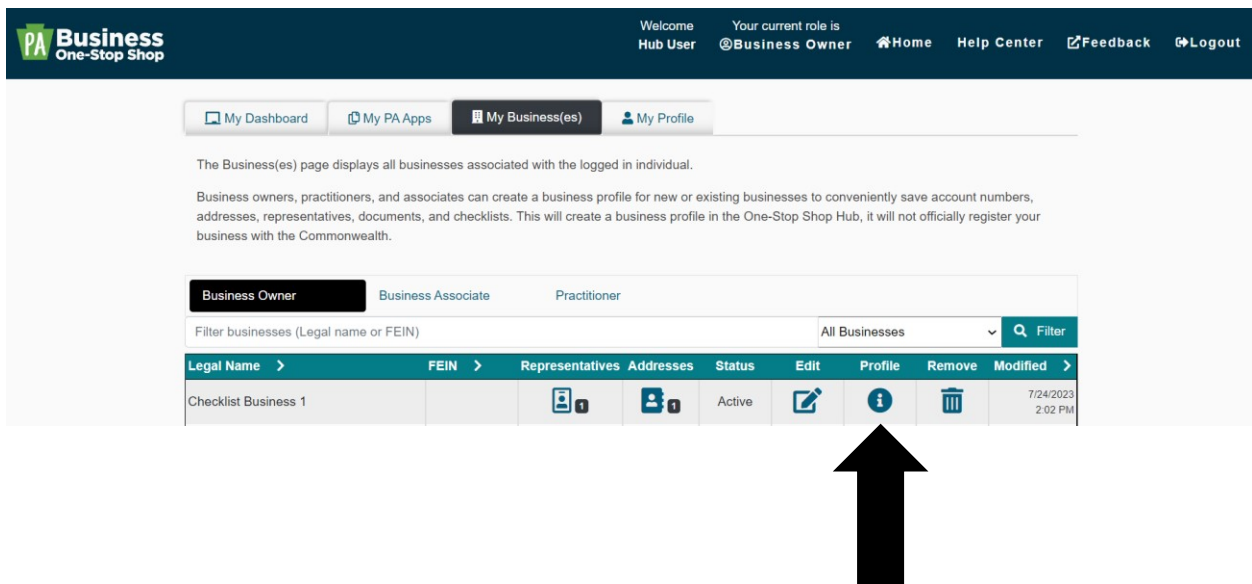
Checklist Name	Legal Name	Fictitious Name	Business Structure	Creation Date	View	Modify	Convert to/View Business Profile	Remove From List
Checklist One Starting a new business in PA	Checklist Business 1	Not provided	Domestic Limited Liability Company	7/24/2023 1:42:56 PM				

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Step 7: Click the *Create Business Profile* button.



Step 8: Some information from the checklist will be pre-populated into the business profile. Complete each screen and add additional required information, including a primary phone, address, and at least one owner. Add any additional information you would like to create your business profile. Once you have done so, your business profile should have an *Active* status in *My Business(es)*. Next, click the *Profile* icon.





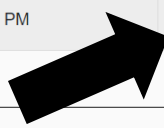
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Step 9: Scroll down to see your recently completed checklist. Click the *View Checklist* icon.

Type	Address	Municipality
Business Location	691 Monroe St Harrisburg, PA 17113-3135	SWATARA TWP
View Addresses		

Checklist(s)

Checklist Name/Type	Status	Last Refresh Date	View Checklist	Remove Checklist
Checklist One	Active	7/24/2023 1:52:15 PM		
View Checklists Add New Checklist				



Document(s)

Category/Type	Document Name	Sharing	Version	Upload Date	Download	Action
You have no documents.						
View Documents Add New Document						

[Back to My Business\(es\)](#)

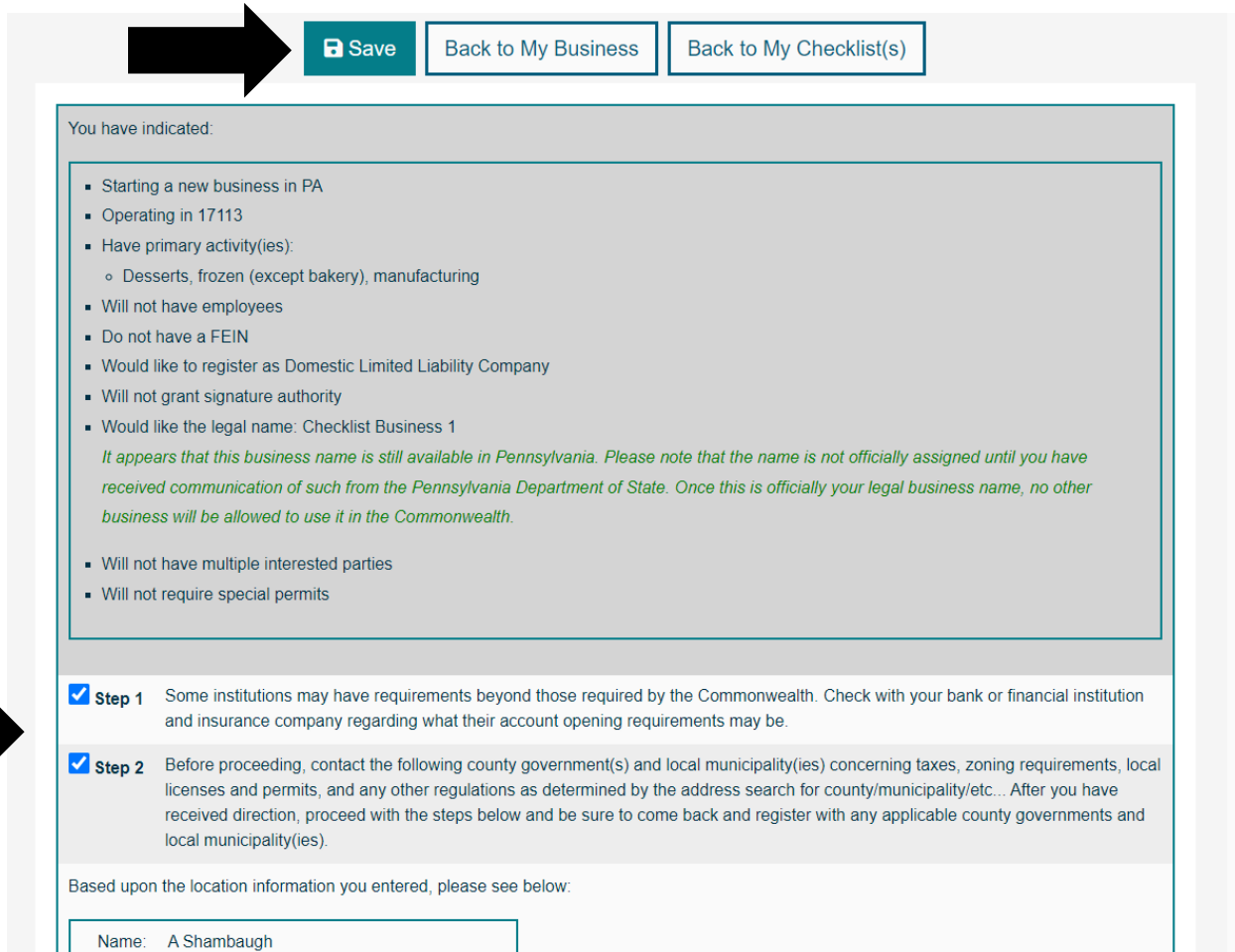
[Edit Business](#)

[Remove Business](#)

[Back to Dashboard](#)

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Step 10: You can now mark steps complete and save your checklist progress. To do so, check the box next to the completed step and click the **Save** button. Exit the page by clicking the *Back to My Business* button or *Back to My Checklist(s)* button.



The screenshot shows a web interface for a business checklist. At the top, there are three buttons: a teal 'Save' button with a floppy disk icon, a white 'Back to My Business' button, and a white 'Back to My Checklist(s)' button. A large black arrow points from the left towards the 'Save' button. Below the buttons is a grey box titled 'You have indicated:' containing a list of business details. Below this is a list of two steps, both with checked checkboxes. A large black arrow points from the left towards the 'Step 2' checkbox. Below the steps is a section titled 'Based upon the location information you entered, please see below:' with a text input field containing 'Name: A Shambaugh'.

Save **Back to My Business** **Back to My Checklist(s)**

You have indicated:

- Starting a new business in PA
- Operating in 17113
- Have primary activity(ies):
 - Desserts, frozen (except bakery), manufacturing
- Will not have employees
- Do not have a FEIN
- Would like to register as Domestic Limited Liability Company
- Will not grant signature authority
- Would like the legal name: Checklist Business 1
It appears that this business name is still available in Pennsylvania. Please note that the name is not officially assigned until you have received communication of such from the Pennsylvania Department of State. Once this is officially your legal business name, no other business will be allowed to use it in the Commonwealth.
- Will not have multiple interested parties
- Will not require special permits

Step 1 Some institutions may have requirements beyond those required by the Commonwealth. Check with your bank or financial institution and insurance company regarding what their account opening requirements may be.

Step 2 Before proceeding, contact the following county government(s) and local municipality(ies) concerning taxes, zoning requirements, local licenses and permits, and any other regulations as determined by the address search for county/municipality/etc... After you have received direction, proceed with the steps below and be sure to come back and register with any applicable county governments and local municipality(ies).

Based upon the location information you entered, please see below:

Name: A Shambaugh

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Step 11: Click the *Back to Dashboard* button to see your Checklist Progress Status Bar. Click the individual steps to quickly open steps, mark steps complete, and save your updated checklist.

The screenshot displays the PA Business One-Stop Shop dashboard. At the top, there is a navigation bar with the logo and user information: "Welcome Hub User", "Your current role is @Business Owner", and links for "Home", "Help Center", "Feedback", and "Logout". Below this is a secondary navigation bar with "My Dashboard", "My PA Apps", "My Business(es)", and "My Profile".

The main content area features a pink informational banner with a welcome message and a notice about business filings processed through 05/14/2023. Below the banner is a row of five widgets: "Notifications 1", "Documents 0", "Checklists 1", "Newsletters 2", and "What's New 1".

The "Checklist Progress" section is highlighted with a blue header. It contains the following text: "Checklist One - Starting a new business in PA. To update your progress, click the steps below to open the checklist, check the box next to the completed step, and click save. To view another checklist, click the appropriate checklist on the right." Below this text is a progress bar with six steps. Step 1 and Step 2 are marked with green checkmarks, while Steps 3, 4, 5, and 6 are marked with red exclamation marks. A large black arrow points to the Step 1 icon. To the right of the progress bar is a section titled "Active Checklists" with a dropdown arrow and a link for "Checklist One". A note at the bottom states: "Note: This checklist can be removed from your dashboard by clicking [Dismiss](#)."

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Scenario 2: Creating a checklist linked to an active business profile.

Step 1: Go to <https://hub.business.pa.gov>. Enter your username and password in the appropriate form fields. Click the *Log in* button.

The screenshot shows the login page for the Business One-Stop Shop. At the top left is the logo. On the right, there are links for Feedback, FAQs, and Help. A pink banner contains a message about Keystone Login. Below this, there are two main sections: 'Login to your account' and 'Register a new account'. The login section has fields for 'Username' and 'Password' with a 'Log in' button. A large black arrow points to this button. The registration section has a 'Register' button and explanatory text. At the bottom, there are logos for 'Powered by PA KEYSTONE LOGIN' and a 'Privacy - Terms' link.

Step 2: Click the *Checklists* button.

The screenshot shows the dashboard after login. At the top is a dark navigation bar with the logo and user information. Below it is a secondary navigation bar with buttons for 'My Dashboard', 'My PA Apps', 'My Business(es)', and 'My Profile'. A pink banner contains a welcome message. Below the banner is a row of five buttons: 'Notifications 1', 'Documents 0', 'Checklists 6', 'Newsletters 2', and 'What's New 1'. A large black arrow points to the 'Checklists' button. Below this row is a 'Quick Actions' section with buttons for 'Register a Business', 'Purchase Documents', 'Amend a Business', 'Link My Business', and 'Create a Checklist'. On the right side, there is a 'Quick Links' section with links for 'Business Filing Services', 'PA Grants', and 'myPATH (Revenue)'.

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Step 3: Click the *Create Your Checklist* button.

My Checklist(s)

The following list displays all the checklist(s) associated with the logged in individual.

The **Convert to/View Business Profile** will use the data entered in Checklist and create a profile of the business in Business One-Stop Shop. This is the first step towards initiating the process to register your business with the Commonwealth. Please note that this will not complete the paperwork needed to register the business with the Commonwealth.

For Checklists that are not named, you can provide a name by clicking on the + icon in the Checklist Name column. If you would like to change the name of a Checklist, click on the Checklist Name.

Checklist Name	Legal Name	Fictitious Name	Business Structure	Creation Date	View	Modify	Convert to/View Business Profile	Remove From List
You have no checklists.								

Create Your Checklist **Back to Dashboard**

Create Your Checklist: Get a customized checklist for creating your business. Answer the questions on the following pages to get a list of the licenses, permits, forms and contact information you will need, as well as additional information that you may want to know.

Step 4: The dropdown menu defaults to *Create a new checklist*. Type a name for your checklist in the form field. Then, click the *Get Started* button.

PA Business One-Stop Hub - Google Chrome

hubat.business.beta.pa.gov/Home/Register

An Official Pennsylvania Government Website

PA Business One-Stop Shop

Answer questions
You will be asked basic questions about your business.

It takes about 5-7 minutes
It's easy!

Get your custom checklist
Find the requirements that matter to your business.

If you would like to create a checklist for an existing business profile, you can select the existing business from the dropdown. While creating the checklist, details from the existing business profile will be used to pre-populate some questions within the new checklist. If you choose to change any of the existing checklist information, you will also need to manually update the original business profile. **NOTE:** If your business is already registered with another Commonwealth agency, please remember to make your changes in that agency system as well.

Please select *Create a new checklist* or select an existing business profile from the dropdown menu to proceed:

Provide name for the checklist:

Create a new checklist (dropdown menu)
 Create a new checklist
 Checklist Business 1
 Checklist Scenario Two

Get Started

ACCESSIBILITY | PRIVACY & DISCLAIMERS | SECURITY | CONTACT US

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Step 5: Complete the screens as required to generate a Business Checklist. Information from the business profile will be added to the checklist where appropriate. After the checklist has been generated you can mark steps complete and save your checklist progress. To do so, check the box next to the completed step and click the **Save** button. Exit the page by clicking the *Back to My Business* button or the *Back to My Checklist(s)* button.

Checklist Business 1

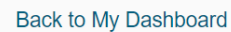
Business Registration Checklist

The steps within this checklist, as they are completed, will be saved.

Please note, this information is supplied as a guide and should not take the place of legal or tax advice. We recommend the consultation of a lawyer, accountant, and an insurance agent for your business. To request no-cost technical assistance for your startup or existing business, contact your local Small Business Development Center (SBDC) by visiting <http://www.pasbdc.org/centers>.

 Save

 Back to My Business

 Back to My Dashboard

You have indicated:

- Amending an existing business in PA
- Changing the Business Legal Name
- Current business structure is Limited Liability Company
- The business did not or does not have employees
- The business does not have license or tax accounts with the PA Department of Revenue
- You do not have special permits, authorizations, or licenses

Step 1 The [Certificate of Amendment](#) will need to be completed with the PA Department of State.

Step 2 If the business has any permits, licenses, or authorizations from another Commonwealth agency, you will need to contact them to advise them of the changes.

Additional Resources:

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Step 6: Click the *Back to Dashboard* button to see your Checklist Progress Status Bar. Click the individual steps to quickly open, mark steps complete, and save your checklist.

The screenshot shows the PA Business One-Stop Shop dashboard. At the top, there is a dark blue header with the logo on the left and navigation links: Welcome Hub User, Your current role is @Business Owner, Home, Help Center, Feedback, and Logout. Below the header, there are two pink notification banners. The first banner says: "Newsletter and Notifications about grant programs available to businesses in the Commonwealth, and login to Business Filing Services to manage your business." The second banner says: "The PA Department of State has processed all submitted business filings through 05/14/2023. You can check your business filing status and obtain associated documents in Business Filing Services' [My Work Queue](#)." Below the notifications is a row of five colored buttons: Notifications (1), Documents (0), Checklists (2), Newsletters (2), and What's New (1). The "Checklists (2)" button is highlighted with a large black arrow pointing to it. Below this row is the "Checklist Progress" section. It has a blue header "Checklist Progress" and a sub-header "Checklist Scenario Two - Amending an existing business in PA". Below the sub-header is a paragraph: "To update your progress, click the steps below to open the checklist, check the box next to the completed step, and click save. To view another checklist, click the appropriate checklist on the right." Below the paragraph is a progress bar with two steps: "Step 1" (with a green checkmark icon) and "Step 2" (with a white exclamation mark icon). Below the progress bar is a note: "Note: This checklist can be removed from your dashboard by clicking [Dismiss](#)." To the right of the progress bar is a section titled "Active Checklists" with a dropdown arrow. It contains two links: "Checklist Scenario Two" and "Checklist One".