

## 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).

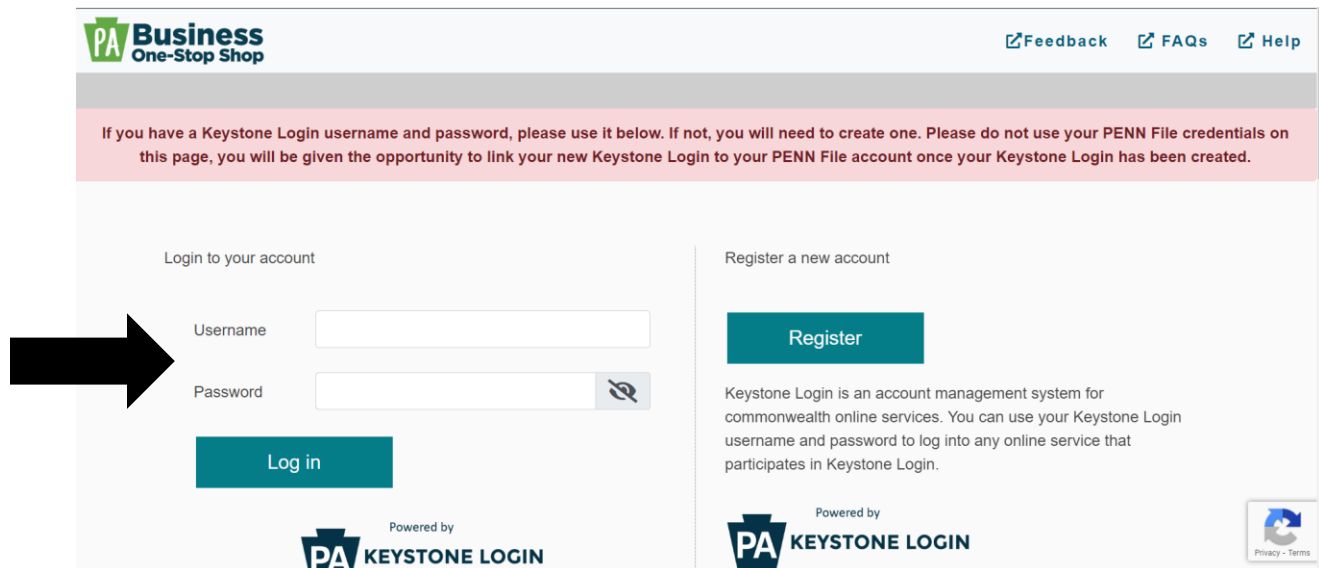
- Follow these steps if you want to create a checklist and you do not yet have an active business profile in *My Business(es)*. Completing these steps will also create a new business profile.

**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.

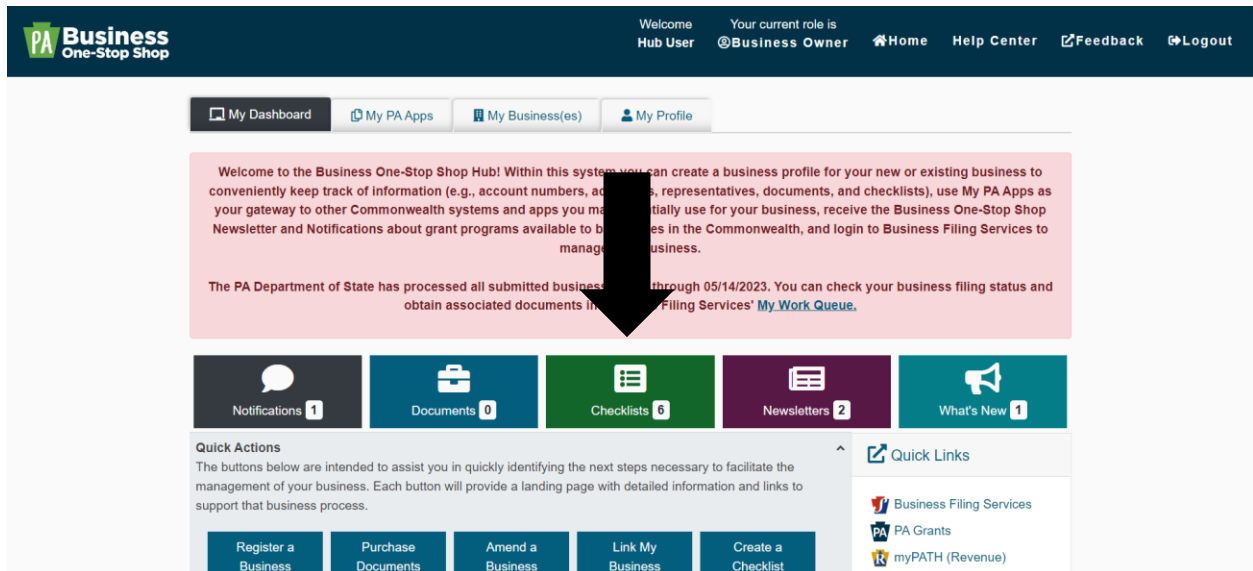
**Step 1:** Go to <https://hub.business.pa.gov>. Enter your username and password in the appropriate form fields. Click the *Log in* button. New users should register for an account by clicking the *Register* button on the right. [Click here](#) for additional assistance with registering as a new user 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*.



The screenshot shows the PA Business One-Stop Shop website. At the top, there is a header with the PA Business One-Stop Shop logo on the left and links for Feedback, FAQs, and Help on the right. Below the header is a pink banner with text: "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." The main content area is divided into two columns. The left column is titled "Login to your account" and contains fields for Username and Password, a "Log in" button, and a "Powered by PA KEYSTONE LOGIN" logo at the bottom. A large black arrow points to the Username field. The right column is titled "Register a new account" and contains a "Register" button, a paragraph of text about Keystone Login, and a "Powered by PA KEYSTONE LOGIN" logo at the bottom. A "Privacy - Terms" link is visible in the bottom right corner.

## How to Create a Business Checklist and Save your Progress

**Step 2:** Click the *Checklists* button.



Welcome to the Business One-Stop Shop Hub! Within this system you can create a business profile for your new or existing business to conveniently keep track of information (e.g., account numbers, addresses, representatives, documents, and checklists), use My PA Apps as your gateway to other Commonwealth systems and apps you may eventually use for your business, receive the Business One-Stop Shop Newsletter and Notifications about grant programs available to businesses in the Commonwealth, and login to Business Filing Services to manage your business.

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](#).

Notifications 1 Documents 0 Checklists 6 Newsletters 2 What's New 1

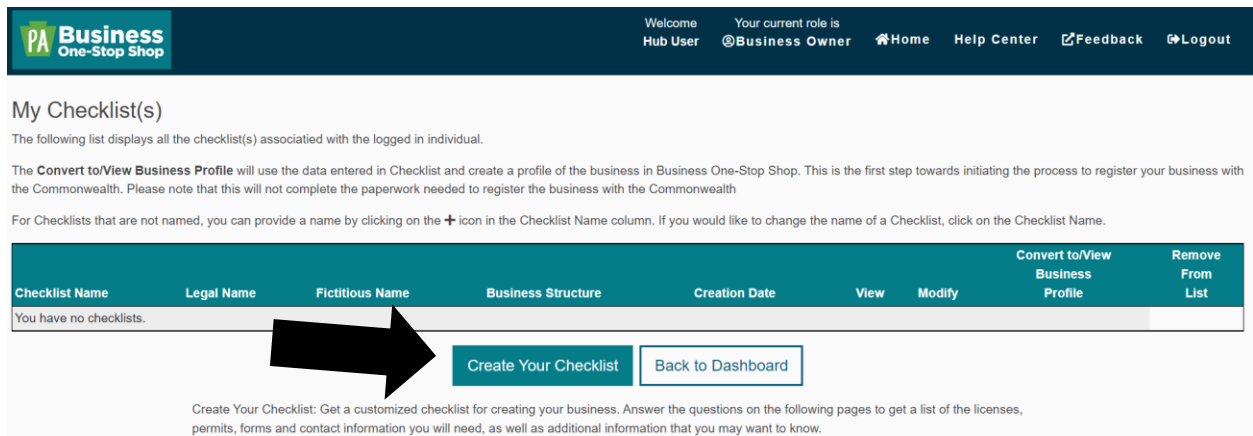
**Quick Actions**  
The buttons below are intended to assist you in quickly identifying the next steps necessary to facilitate the management of your business. Each button will provide a landing page with detailed information and links to support that business process.

Register a Business Purchase Documents Amend a Business Link My Business Create a Checklist

**Quick Links**

- Business Filing Services
- PA Grants
- myPATH (Revenue)

**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.


## How to Create a Business Checklist and Save your Progress

**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.




**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**

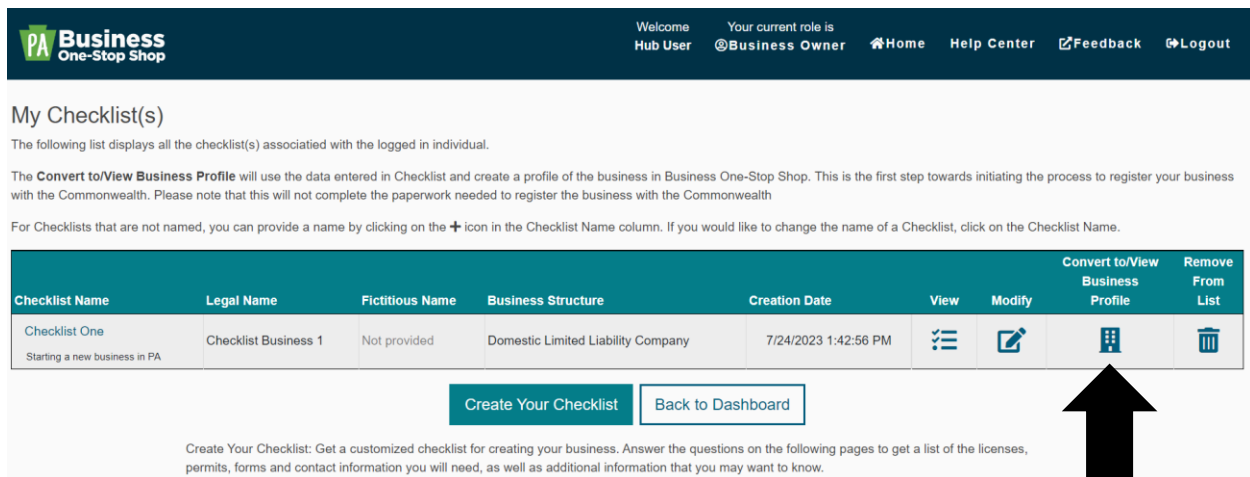


## How to Create a Business Checklist and Save your Progress

**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.

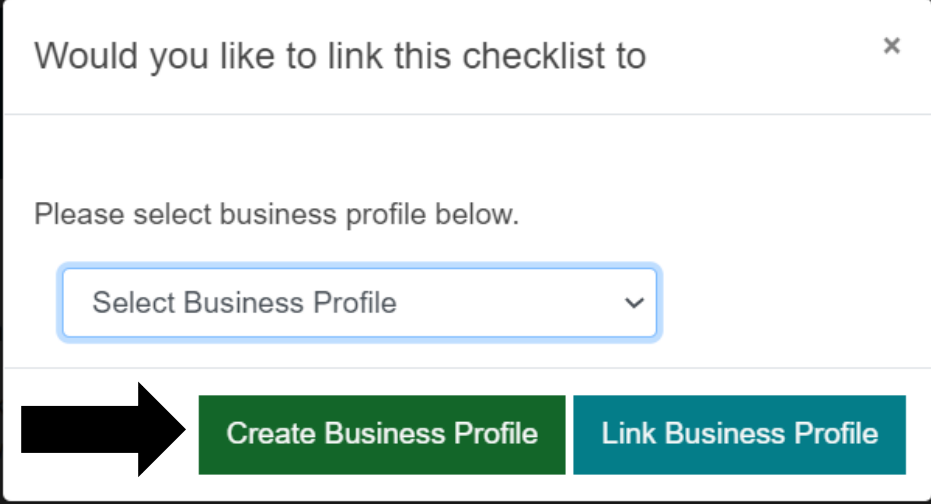


Checklist Name	Legal Name	Fictitious Name	Business Structure	Creation Date	View	Modify	Convert to View Business Profile	Remove From List
Checklist One Starting a new business in PA	Checklist Business 1	Not provided	Domestic Limited Liability Company	7/24/2023 1:42:56 PM				

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.

## How to Create a Business Checklist and Save your Progress


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



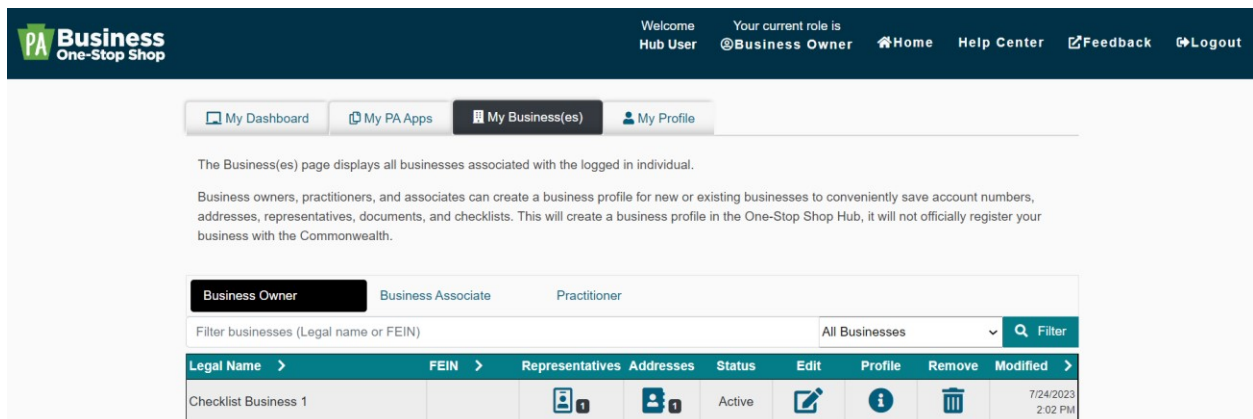
Would you like to link this checklist to ×

Please select business profile below.

Select Business Profile ▼

 Create Business Profile Link Business Profile

**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.



PA Business One-Stop Shop

Welcome Hub User Your current role is @Business Owner Home Help Center Feedback Logout


My Dashboard My PA Apps **My Business(es)** My Profile

The Business(es) page displays all businesses associated with the logged in individual.

Business owners, practitioners, and associates can create a business profile for new or existing businesses to conveniently save account numbers, addresses, representatives, documents, and checklists. This will create a business profile in the One-Stop Shop Hub, it will not officially register your business with the Commonwealth.

Business Owner Business Associate Practitioner

Filter businesses (Legal name or FEIN) All Businesses Filter



Legal Name >	FEIN >	Representatives	Addresses	Status	Edit	Profile	Remove	Modified >
Checklist Business 1				Active				7/24/2023 2:02 PM

## How to Create a Business Checklist and Save your Progress

**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
<a href="#">View Addresses</a>		

Checklist(s)

Checklist Name/Type	Status	Last Refresh Date	View Checklist	Remove Checklist
Checklist One	Active	7/24/2023 1:52:15 PM		
<a href="#">View Checklists</a> <a href="#">Add New Checklist</a>				

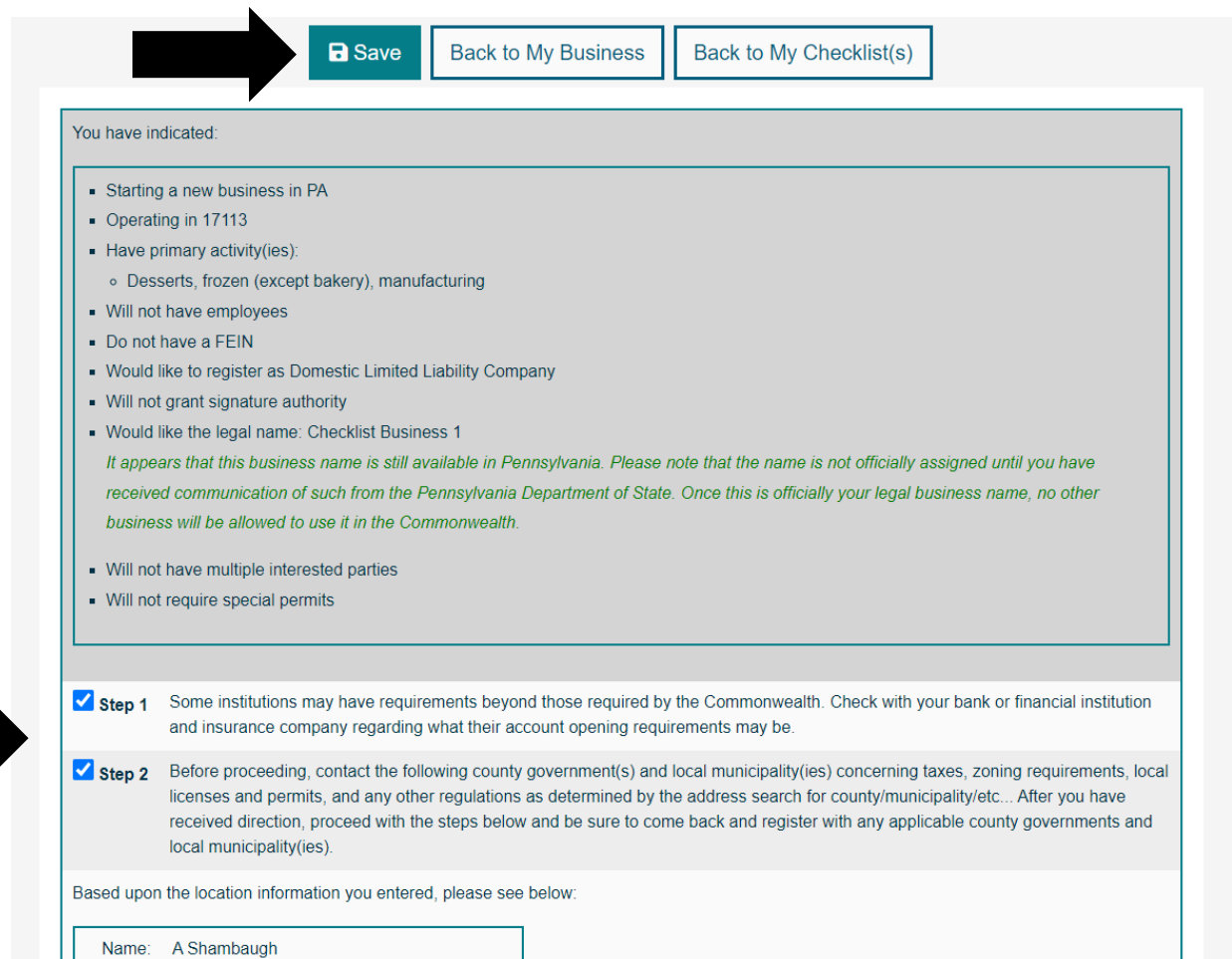
Document(s)

Category/Type	Document Name	Sharing	Version	Upload Date	Download	Action
You have no documents.						
<a href="#">View Documents</a> <a href="#">Add New Document</a>						

[Back to My Business\(es\)](#)
[Edit Business](#)
[Remove Business](#)
[Back to Dashboard](#)

## How to Create a Business Checklist and Save your Progress

**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 creating a business checklist. At the top, there are three buttons: a dark blue 'Save' button with a floppy disk icon, and two light blue buttons labeled 'Back to My Business' and 'Back to My Checklist(s)'. A large black arrow points to the 'Save' button. Below the buttons is a section titled 'You have indicated:' containing a list of business details. A second large black arrow points to the 'Step 1' and 'Step 2' checkboxes in the progress section.

**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.

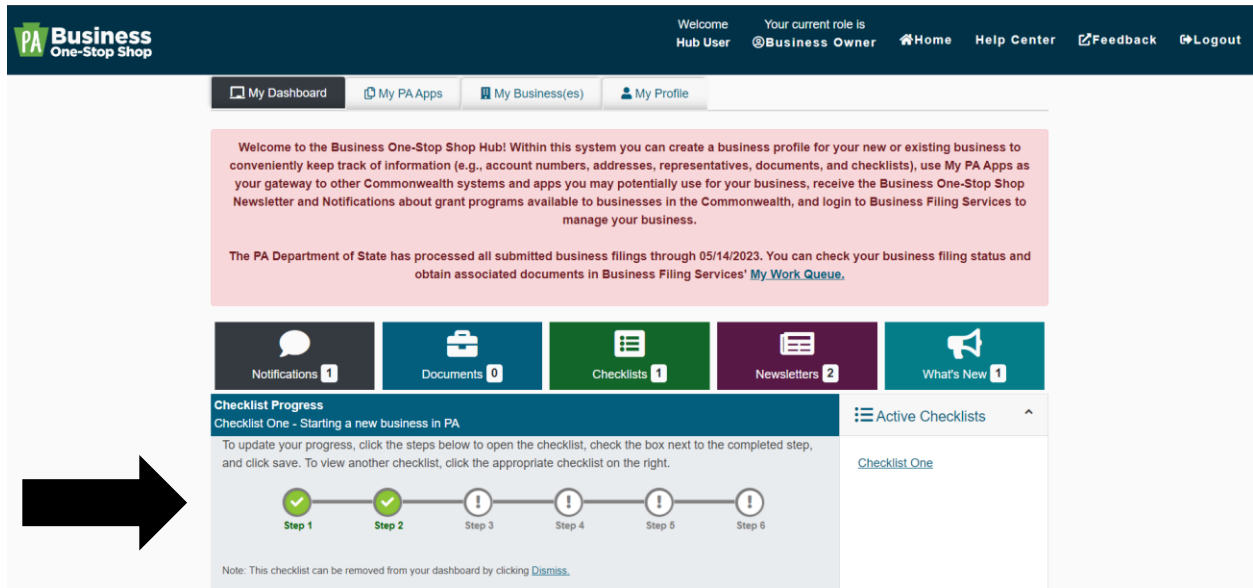
☒ **Step 2** Before proceeding, contact the following county government(s) and local municipality(ies) concerning taxes, zoning requirements, local licenses and permits, and any other regulations as determined by the address search for county/municipality/etc... After you have received direction, proceed 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

## How to Create a Business Checklist and Save your Progress

**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 shows the PA Business One-Stop Shop dashboard. At the top, there is a navigation bar with the logo and user information. Below the navigation bar, there are tabs for "My Dashboard", "My PA Apps", "My Business(es)", and "My Profile". The main content area features a welcome message and a section for "Checklist Progress". The "Checklist Progress" section displays a progress bar with six steps: Step 1 (completed), Step 2 (completed), Step 3 (in progress), Step 4 (pending), Step 5 (pending), and Step 6 (pending). A large black arrow points to the "Checklist Progress" section.

**Checklist Progress**  
 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.

Step 1 (Completed) Step 2 (Completed) Step 3 (In Progress) Step 4 (Pending) Step 5 (Pending) Step 6 (Pending)

Note: This checklist can be removed from your dashboard by clicking [Dismiss](#).

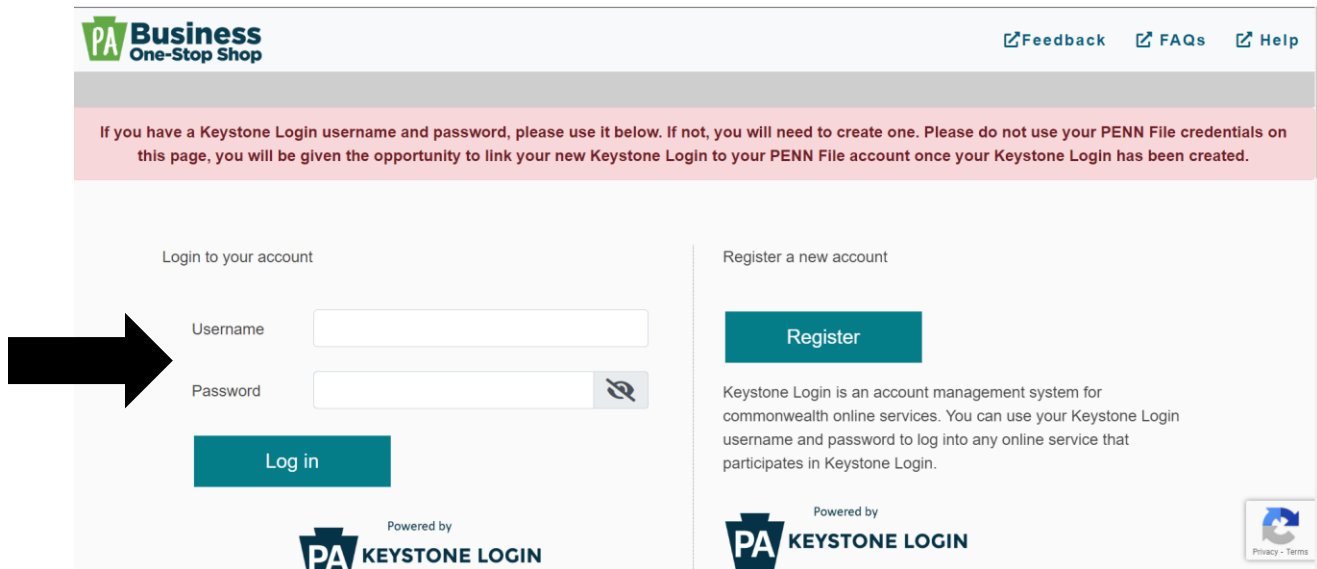
**Active Checklists**  
[Checklist One](#)



## How to Create a Business Checklist and Save your Progress

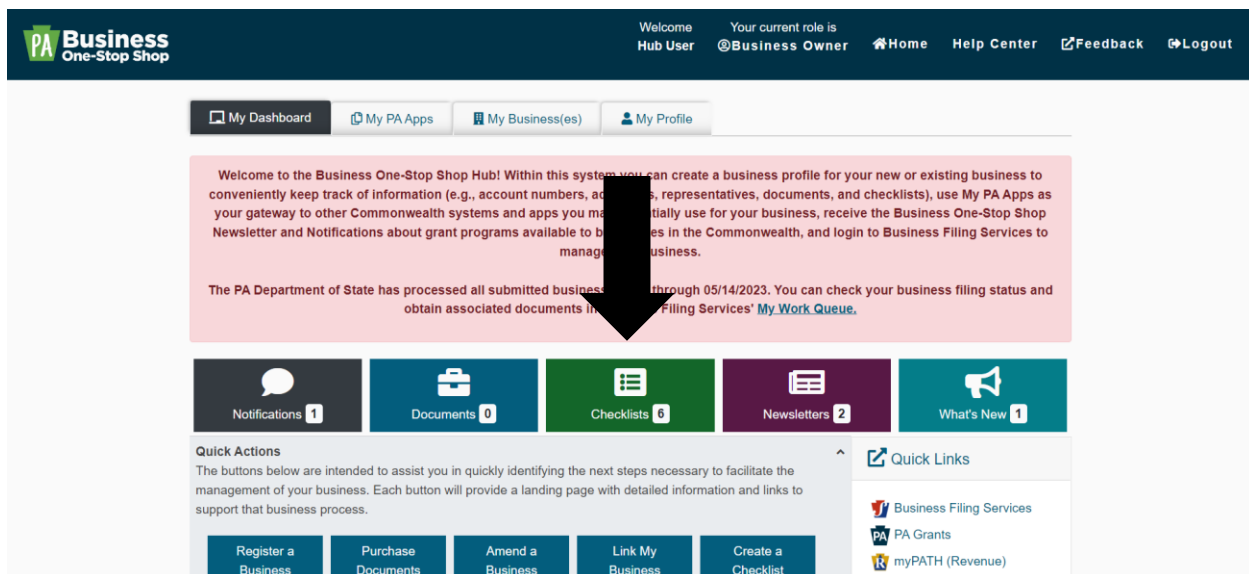
### Scenario 2: Creating a checklist linked to an active business profile.

**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 PA Business One-Stop Shop. At the top, there is a header with the logo and navigation links for Feedback, FAQs, and Help. Below the header, a pink banner contains a message about Keystone Login. The main content area is divided into two sections: 'Login to your account' and 'Register a new account'. The login section has fields for Username and Password, with a 'Log in' button below them. A large black arrow points to the 'Log in' button. The register section has a 'Register' button and a paragraph of text about Keystone Login. Both sections are powered by Keystone Login, as indicated by the logo at the bottom.

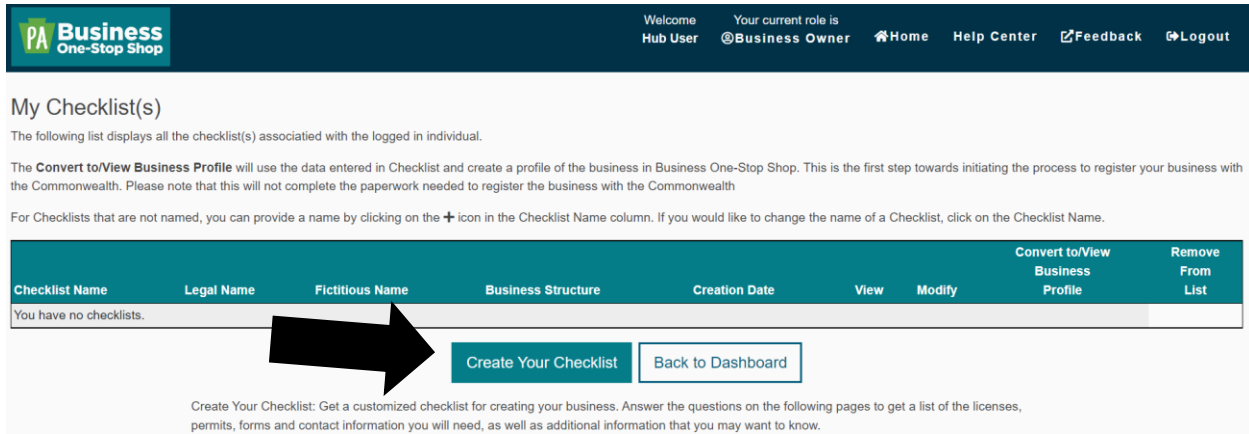
**Step 2:** Click the *Checklists* button.



The screenshot shows the dashboard of the PA Business One-Stop Shop. At the top, there is a dark blue header with the logo and navigation links for Welcome, Hub User, Business Owner, Home, Help Center, Feedback, and Logout. Below the header, there is a navigation bar with links for My Dashboard, My PA Apps, My Business(es), and My Profile. The main content area is divided into two sections. The top section is a pink banner with a welcome message and a paragraph of text. A large black arrow points to the 'Checklists' button in the bottom section. The bottom section contains a row of five buttons: Notifications (1), Documents (0), Checklists (6), Newsletters (2), and What's New (1). Below these buttons is a 'Quick Actions' section with a paragraph of text and five buttons: Register a Business, Purchase Documents, Amend a Business, Link My Business, and Create a Checklist. To the right of the Quick Actions section is a 'Quick Links' section with three links: Business Filing Services, PA Grants, and myPATH (Revenue).

## How to Create a Business Checklist and Save your Progress

**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.

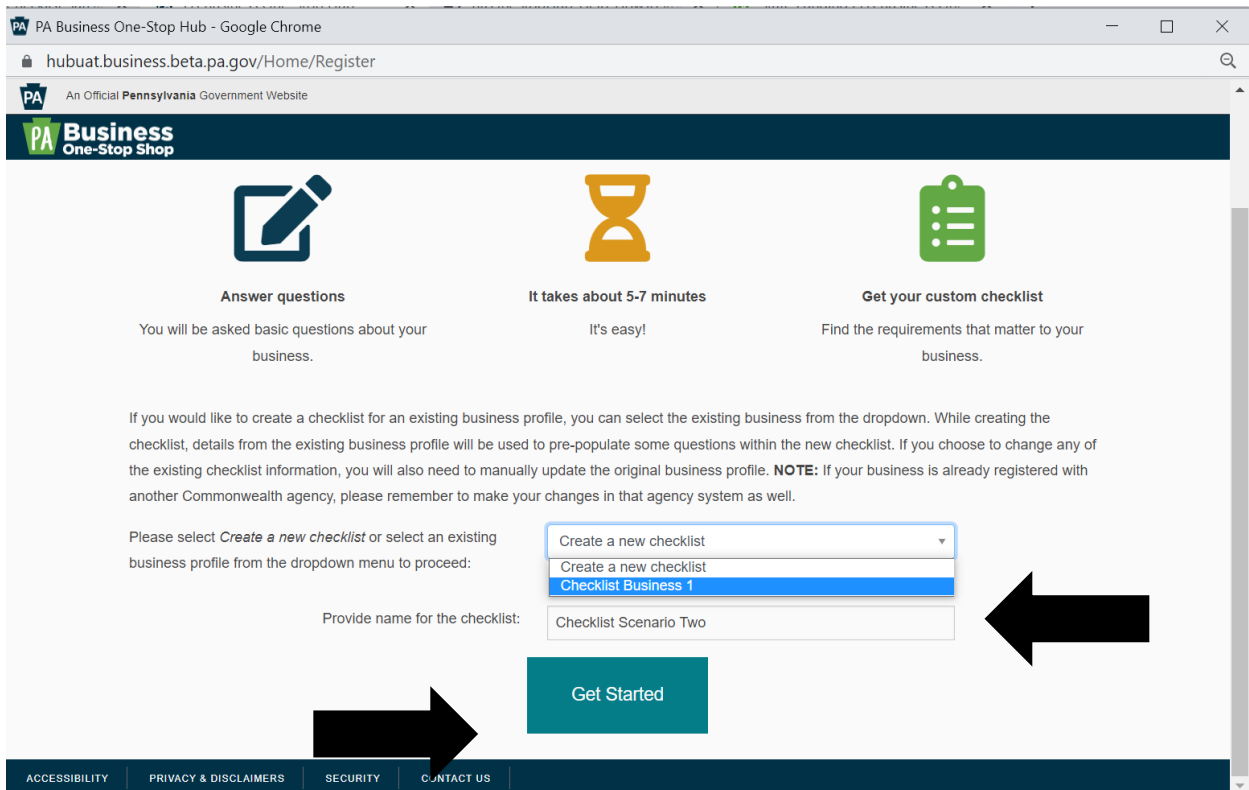
For Checklists that are not named, you can provide a name by clicking on the **+** icon in the Checklist Name column. If you would like to change the name of a Checklist, click on the Checklist Name.

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

hubsat.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** **Get Started**

Checklist Scenario Two

## How to Create a Business Checklist and Save your Progress


**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

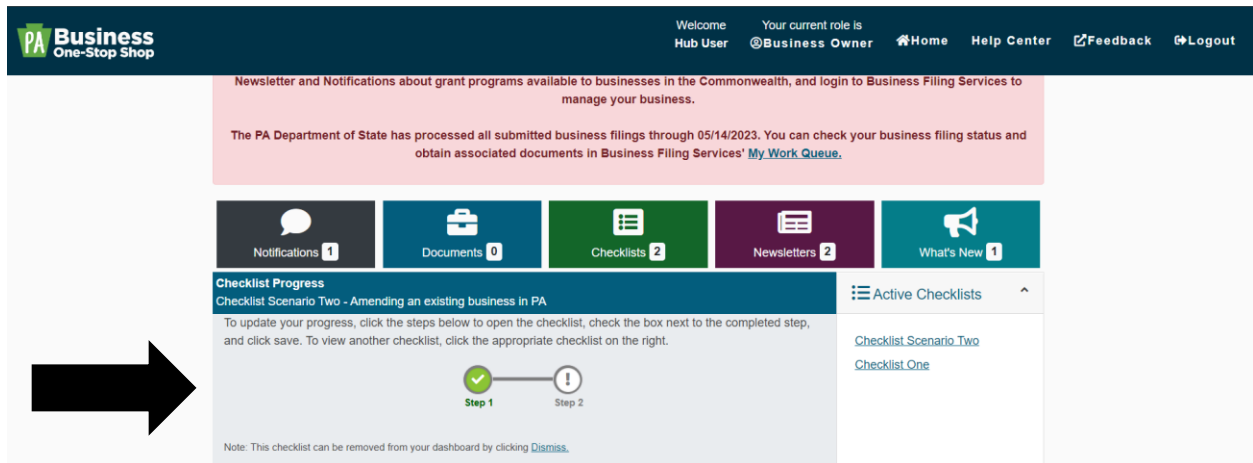
☒ **Step 1** The [Certificate of Amendment](#) will need to be completed with the PA Department of State.

☐ **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:**

## How to Create a Business Checklist and Save your Progress

**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 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, Logout) on the right. Below the header is a pink notification bar with two messages. Underneath is a row of five colored tiles: Notifications (1), Documents (0), Checklists (2), Newsletters (2), and What's New (1). The 'Checklists' tile is highlighted with a large black arrow pointing to it. Below the tiles is the 'Checklist Progress' section for 'Checklist Scenario Two - Amending an existing business in PA'. It contains instructions on how to update progress and a progress bar with 'Step 1' (completed, green checkmark) and 'Step 2' (pending, grey circle with exclamation mark). To the right of the progress bar is a list of 'Active Checklists' with links for 'Checklist Scenario Two' and 'Checklist One'. A note at the bottom states: 'Note: This checklist can be removed from your dashboard by clicking [Dismiss](#).'