

Microsoft Nonprofit Eligibility Checklist

Canada — Step-by-Step Guide for Organisations

Microsoft's nonprofit program provides eligible Canadian organisations with access to up to 300 free Microsoft 365 Business Basic licences and discounts on paid plans including Business Premium. Eligibility is validated by **Goodstack**, Microsoft's third-party verification partner.

There is a country-specific layer. The eligibility rules at microsoft.com/en-us/nonprofits/eligibility are Microsoft's global standard, and the 'en-us' in the URL refers to language rendering rather than a US-only audience. But the global page is not the whole picture. The phrase “recognised legal status in their respective country” is a link, and it leads to criteria set out country by country. The Canadian entry is more specific than the global page and more generous than many organisations assume.

Use this checklist before starting the registration process. This checklist is a practical guide only; eligibility determinations are made solely by Microsoft and Goodstack.

- The person completing the Microsoft nonprofit registration must be a current employee or board-level executive volunteer of the organisation. An IT provider or MSP cannot complete it on your behalf — doing so violates Microsoft's terms and creates grounds for revocation of nonprofit status.

The Four Qualifying Routes for Canada

Microsoft's country-specific criteria for Canada recognise four routes to recognised legal status. Meeting any one of them clears the legal-structure test.

Qualifying Route	Basis
CRA registered charity	Approved by the Canada Revenue Agency, holds an active charity registration number, files a T3010 annually. The cleanest evidence of eligibility and the fastest route through validation.
Nonprofit operating entity with tax exemption	Tax-exempt under paragraph 149(1)(l) of the Income Tax Act.
Federal nonprofit corporation	Incorporated under the Canada Not-for-profit Corporations Act (CNCA).
Provincial nonprofit	Incorporated under ONCA or a provincial equivalent.

- **Co-operatives are not eligible.** Organisations registered as co-operatives are expressly excluded from Microsoft's Canadian criteria, regardless of how they are otherwise structured or whether they operate on a not-for-profit basis.

Legal structure is only the first gate. The mission test and the categorical exclusions in Phase 1 decide the rest, and they are where most Canadian applications actually fail.

Phase 1 — Pre-Check | Complete This Before Touching Microsoft's Portal

Work through every item. A “no” on structure, mission, or exclusions is a strong disqualifier. Stop here and consult before proceeding.

- ☐ **Confirm your legal structure matches one of the four qualifying routes above.** A CRA charity number is one route, not the only one. An ONCA or CNCA nonprofit corporation without a charity number can qualify on legal structure.
- ☐ If you hold CRA charity registration, confirm it is **active**. Search the apps.cra-arc.gc.ca/ebci/hacc/srch/pub/dsplyBscSrch — lapsed or revoked registrations do not support this route. If you qualify by another route, a charity number is not required.
- ☐ **Confirm your organisation is not registered as a co-operative** — co-operatives are expressly excluded.
- ☐ **Public libraries and public museums:** No CRA charity number and no nonprofit legal status required — Microsoft provides access to nonprofit pricing under an explicit carve-out. Museums must be open to the public. Confirm your status with your governing authority and proceed to Phase 2.

- ☐ **Healthcare organisations:** Confirm you are **not** a healthcare delivery organisation, a Family Health Team (FHT), or an Ontario Health Team (OHT). These are ineligible under the healthcare and governmental-organisation exclusions. The US clinic carve-outs named in Microsoft's policy (CAH, REH, FQHC, RHC, SNF, LTC) are all US federal designations and do not extend eligibility to Canadian healthcare organisations.
- ☐ Confirm your organisation is **not** a municipality, Crown agency, school, college, or university — all are explicitly excluded. Schools and post-secondary institutions should use Microsoft Academic licensing instead.
- ☐ Confirm your organisation's mission aligns with at least one of: relief of poverty, advancing education, improving social welfare, preserving culture or the environment, promoting human rights, or establishing civil society.
- ☐ Confirm your organisation is not primarily **member-benefit**. Professional associations, trade associations, and professional or semi-professional sports bodies are named exclusions. Recreation clubs and member-benefit societies generally fail the public-benefit test even where properly incorporated as nonprofits.
- ☐ If government operational funding is your primary funding source, assess carefully — governmental organisations are explicitly excluded.

Phase 2 — Prepare | Gather What You Need Before Registering

- ☐ **Evidence of your qualifying legal status** — depending on your route: CRA charity registration number, confirmation of tax-exempt status under s.149(1)(l), or your CNCA / ONCA incorporation record. This is one credential among several accepted routes; supply the one that matches your structure.
- ☐ **Organisation's full legal name** exactly as registered with your provincial or federal corporate registry, and with CRA if you hold charity registration.
- ☐ **Corporation Information Sheet** from the applicable corporate registry (Ontario Business Registry, Corporations Canada, or provincial equivalent). This is the document Goodstack typically requests from Canadian applicants.
- ☐ **Name and email address** of the employee or board-level executive volunteer who will complete the registration. This person must be verifiably associated with the organisation.
- ☐ **Organisation website URL** — required as part of the registration form.

Phase 3 — Apply | Organisation Staff Must Complete This — Not Your IT Provider

- ☐ Visit nonprofit.microsoft.com and run the Eligibility Pre-Check tool. Select Canada as the country and enter your primary organisational activity.
- ☐ A current **employee or board-level executive volunteer** completes the registration form. Confirm they are using their own organisational email address — not that of your IT provider.
- ☐ Submit the registration and allow up to **3–5 business days** for Goodstack to complete validation. Goodstack may contact the applicant directly to request the Corporation Information Sheet or additional documentation.
- ☐ Once approved, verify the confirmation is consistent with your organisation's actual legal structure. Microsoft reserves the right to grant or deny participation, and to audit eligibility, at any time.

Phase 4 — After Approval | Ongoing Compliance

- ☐ Work with your **Microsoft CSP partner** to provision licences at nonprofit pricing. Licences are available through Microsoft's Nonprofit Hub or via a Microsoft CSP partner.

- ☐ Confirm licence assignment scope: nonprofit grants are permitted only for **paid employees and unpaid executive staff acting as leadership** — not program participants, members, or donors. One grant account per organisation with centralised IT.
- ☐ Note your **attestation renewal date** and assign an internal owner. Attestation must be completed by organisation staff — not your IT provider. Missing an attestation can result in suspension of nonprofit status.
- ☐ **Confirm current pricing at the time of purchase or renewal.** Microsoft sets nonprofit pricing as a percentage of commercial pricing and may change it at any time. Verify against Microsoft's Canadian nonprofit pricing pages rather than relying on any figure in a third-party document, including this one.
- ☐ If your organisation's legal structure, primary funding model, or operational status changes materially, reassess eligibility before your next renewal.

Glossary of Acronyms

Acronym	Definition
CNCA	Canada Not-for-profit Corporations Act — federal legislation governing federally incorporated nonprofits. Incorporation under the CNCA is a qualifying route.
CRA	Canada Revenue Agency — federal agency that registers and regulates Canadian charities
CSP	Cloud Solution Provider — Microsoft partner channel through which licences are provisioned and managed
FHT	Family Health Team — Ontario primary care organisation funded by the Ministry of Health; ineligible under the healthcare and governmental exclusions
MSP	Managed Services Provider — IT company managing technology on behalf of client organisations
NPO	Not-for-Profit Organisation — an incorporated nonprofit. Federal (CNCA) and provincial (ONCA and equivalent) nonprofit corporations, and tax-exempt NPOs, are qualifying routes in their own right
OHT	Ontario Health Team — provincial integrated care network; ineligible under the healthcare and governmental exclusions
ONCA	Ontario Not-for-Profit Corporations Act — provincial legislation governing Ontario nonprofits. Incorporation under ONCA is a qualifying route

Sources

Source	URL
Microsoft nonprofit eligibility — organisation criteria and exclusions	microsoft.com/en-us/nonprofits/eligibility
Microsoft nonprofit eligibility — country-specific criteria	aka.ms/eligibility-requirements
Goodstack nonprofit definitions by country	poweredbypercent.com/nonprofit-definitions
Microsoft Learn — eligibility guidelines	learn.microsoft.com/en-us/industry/nonprofit/microsoft-for-nonprofits/eligibility
Microsoft nonprofit FAQ	microsoft.com/en-us/nonprofits/faq
Goodstack — verification process	help.goodstack.org/what-is-percents-verification-process
Microsoft 365 business plans — Canadian nonprofit pricing	microsoft.com/en-ca/microsoft-365/business/nonprofit-plans-and-pricing
Microsoft 365 enterprise plans — Canadian nonprofit pricing	microsoft.com/en-ca/microsoft-365/enterprise/nonprofit-plans-and-pricing
CRA registered charity registry	apps.cra-arc.gc.ca/ebci/hacc/srch/pub/dsplyBscSrch

Source	URL
Microsoft nonprofit portal (registration)	nonprofit.microsoft.com

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