

Local Unit PTA & County Council Standards of Affiliation Checklist

- **Purpose** – To assist your PTA in staying compliant and in good standing with PTA requirements.
- This checklist was designed to help safeguard your PTA's 501 ©3 tax-exempt status.
- Follow submission instructions and pay close attention to due dates.
- **PRINT THIS FORM** and use this checklist is for your PTA's internal monitoring purposes only and does not have to be returned to WV PTA, unless selected for periodic review. Additional information can be found at: www.westvirginiapta.org or email questions to info@westvirginiapta.org.

PTA Name:			National PTA ID#:		County:	
		REQUIREMENT	WHAT TO SUBMIT	WHEN TO SUBMIT	HOW TO SUBMIT	DATE COMPLETED
IRS	1	IRS - IRS Form 990N, 990EZ w/ Schedule A Forms and instructions available at www.irs.org 990N is filed if PTA gross income is under \$50,000 990EZ is filed if PTA gross income is between \$50,000 and \$200,000.	IRS 990N IRS 990EZ Filing is previous fiscal year	Due to IRS by the 15th day of the 5th month after fiscal year end	990N online filing 990EZ via mail to IRS Submit to Givebacks Compliance.	
	2	WV PTA - Officer Form for the current year.	Online	By July 1st	Givebacks or online.	
WV PTA	3	WV PTA - Payment of WVPTA Membership Dues. *Note – to be a unit in good standing, dues for 10 members must be submitted by October 1 st . Additional members are reported monthly.	Givebacks or Membership Form.	Beginning July 15 th and through end of June.	Pay thru Givebacks or mail form/check.	
	4	WV PTA – Financial Review – form and checklist can be found on the WV PTA website. Note – an internal financial review must be performed by at least 3 members of your PTA who are not signers on checking account.	Financial Review Form & Checklist	Within 120 days of fiscal year end	Submit to Givebacks Compliance.	
	5	WV PTA – Proof of Insurance – General liability and bonding.	Copy of Member Certificate of Insurance	Annually	Submit to Givebacks Compliance.	
	6	WV PTA – PTA Bylaws renewal every three years. The renewal date is on the cover of your current bylaws. WV PTA will send reminders and instructions prior to your renewal date from bylaws@westvirginiapta.org .	Google form sent from WV PTA	Renew & review every 3 years	Submit Google form to bylaws email. Upload to Givebacks.	

A benefit of being a PTA is a central location for all of your important paperwork. Givebacks is the required storage area for this information.