

New Jersey PTA Local PTA Standards of Affiliation Agreement Checklist 2018-2019

PURPOSE - To help your PTA stay compliant with the **IRS**, the **State of New Jersey** and **New Jersey PTA**.

This checklist was designed to help you keep your PTA on track and to safeguard your PTA's 501(c)(3) tax exempt status.

- Follow the instructions below. **PAY CLOSE ATTENTION TO THE DUE DATES.**
- This checklist is for your PTA's internal monitoring purposes only and does not have to be returned to NJPTA, unless selected for periodic review.
- Additional information available at www.njpta.org. **DO YOU NEED HELP? Contact the NJPTA office at 609-587-0100. We are here to help!**



PTA NAME	LOCAL UNIT#	COUNTY	REQUIREMENT	WHAT TO SUBMIT	WHEN TO SUBMIT	HOW TO SUBMIT	DATE COMPLETED	
1			IRS - IRS Form 990N, 990ez w/Schedule A or 990 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 \$200,000 990 is filed if PTA gross income is over \$200,000	IRS 990N 2017 or IRS 990ez 2017 or IRS 990 2017 (filing is for 2017-2018 fiscal year)	Must be filed by November 15, 2018 BUT you should file this form as soon as your audit is complete	990N online filing 990ez via mail to IRS 990 via mail to IRS or File990.org		
2			State of New Jersey - Charitable Registration Renewal (if your PTA is registered) Information on how to file: www.njconsumeraffairs.gov Gross \$10,000-\$25,000 -- file form CRI200 Gross \$25,000 or more -- file form CRI300r	NJ CRI200 or NJ CRI300r with fee	by December 31, 2018 BUT you should file this form as soon as your audit is complete	DO NOT MAIL! As of 5/1/18, the State of New Jersey requires online filing.		
3			State of New Jersey - Annual Report (if your PTA is incorporated) Instructions for online filing available at http://www.state.nj.us/treasury/revenue/dcr/programs/ann_rpt.shtml	NJ Annual Report online filing with fee	The anniversary month of your incorporation date	Online filing with electronic payment		
4			NJPTA - Election of Officers/Annual Report of Local PTA Officers After your elections, go to PT Avenue and fill in officer information.	via PT Avenue	by July 1, 2018	PT Avenue online		
5			NJPTA - Mandatory Annual PTA Training All elected officers must complete training by the end of 2019 NJPTA Convention.	N/A	by March 31, 2019	N/A		
6			NJPTA - PTA Budget must be adopted by your PTA general membership at your first general membership meeting of the school year.	N/A	September/October 2018	N/A		
7			NJPTA - Payment of NJPTA Membership Dues Enter membership into PT Avenue and pay dues upon receipt of invoice.	PT Avenue	remit to NJPTA upon receipt of invoice	send check to NJPTA or via ACH in PT Ave	ongoing	
8			NJPTA - NJPTA Audit Report - form available at www.njpta.org The annual audit must be performed by at least 3 members of your PTA	NJPTA Audit Report 2017-2018	NEW DEADLINE!! by August 31, 2018	mail, email, fax to NJPTA		
9			NJPTA - PTA Bylaw Renewal every three years The renewal date is on the cover of your current bylaws. NJPTA will send reminders and instructions prior to your bylaws renewal date.	bylaws template which you will receive from the NJPTA office	Review and renew every 3 years	email to: bylaws@njpta.org		
10			NJPTA - Standing Rules (OPTIONAL, but HIGHLY RECOMMENDED) Standing Rules are specific to the unique needs of your PTA, but cannot conflict with your PTA Bylaws. PTA Standing Rules are a useful tool that ensures year to year continuity of your PTA's operations. For more information on how to construct Standing Rules go to www.njpta.org .					