New Jersey PTA Local PTA Standards of Affiliation Agreement Checklist 2026-2027

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's good standing 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 or email njpta@njpta.org. We are here to help!**

PTA NAME		LOCAL UNIT#	COUNTY			DATE COMPLETED
		REQUIREMENT	WHAT TO SUBMIT	WHEN TO SUBMIT	HOW TO SUBMIT	
IRS	1	**IRS - IRS Form 990N, 990ez w/Schedule A or 990 w/Schedule A** Forms and instructions available at www.irs.org or www.file990.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 or IRS 990ez or IRS 990 http://file990.org/	Must be filed **by November 15th** **After filing, upload 990N confirmation or 990 form to Givebacks**	NJPTA pays for File990 free, easy way to file. File990.org will send you continuous reminders until you file	
State of New Jersey	2	**State of New Jersey - Charities Registration Renewal (if your PTA is registered)** **Information on how to file: contact NJPTA for complete filing instructions** Pages - Charities Registration & Investigation Section (njconsumeraffairs.gov) There is a filing fee (either $30 or $60 depending on gross income).	Online Renewal on NJ Charities Registration Portal	Must be filed **by December 31st.**	Pages - Charities Registration & Investigation Section (njconsumeraffairs.gov)	
	3	**State of New Jersey - Annual Report (if your PTA is incorporated)** File online at: https://www.njportal.com/DOR/AnnualReports/Business?sessionType=AnnualReport	NJ Annual Report online filing with fee	The anniversary month of your incorporation date	Online filing with credit card payment	
New Jersey PTA Requirements	4	**Standing Rules** Find standing rules template at: **www.njpta@njpta.org**	Submit your PTA's approved Standing Rules	Annually - after adoption by your general membership	Upload to Givebacks Go to 'Compliance' tab	
	5	**Election of Officers/Annual Report of Local PTA Officers** After your elections, go to MemberHub and fill in officer information.	Officer name, email & phone number	due by July 1st	Upload to Givebacks Go to 'Compliance' tab	
	6	**Mandatory Annual PTA Training for all elected PTA officers**	N/A	ASAP	www.njpta.org	
	7	**PTA Budget must be adopted by your PTA general membership** at your first general membership meeting of the school year.	N/A	Must be adopted at 1st general meeting	N/A	
	8	**Membership upload and Payment of NJPTA Membership Dues** Enter membership into Givebacks and pay dues monthly	MemberHub	remit by the 15th each month beginning Aug. 15th	via ACH in Givebacks or send check to NJPTA	ongoing
	9	**Financial Review -** find form & instructions at **www.njpta@njpta.org** The financial review must be performed by at least 3 members of your PTA and must be adopted by your General Membership	Financial Review Form **2025-2026**	due by October 31st after being adopted by your general membership	Upload to Givebacks Go to 'Compliance' tab	