

Annual 990 Confirmation

The IRS requires non-profit organizations to file a 990 informational return annually. This filing is also a requirement of remaining a unit in good standing with NCPTA.

Failure to file the 990 return with the IRS for three consecutive years results in revocation of your PTA's tax-exempt status. NCPTA's goal is to prevent our PTAs from losing their tax-exempt status with the IRS.

Please note the following information regarding the requirements for filing the annual 990:

(Instructions available at www.irs.gov)

- Gross receipts are **\$50,000 or less**, the PTA must electronically submit Form 990-N, also known as the e-Postcard.
- Gross receipts are **less than \$200,000 and total assets are less than \$500,000**, the PTA may file Form 990-EZ and other related information forms provided by the IRS.
- Gross receipts of **more than \$200,000** must file Form 990 and other related information forms provided by the IRS.

First Step: File your PTA's 990 return with the IRS by November 15th

Next Step: Confirm filing with NCPTA

Annual 990 Confirmation Instructions

By November 15, you will need to submit your Form 990 Confirmation in MemberHub. If your PTA files an extension with the IRS, in order to be in good standing, you must still submit your 990 Confirmation indicating the extension. You must resubmit this confirmation when the 990 is actually filed.

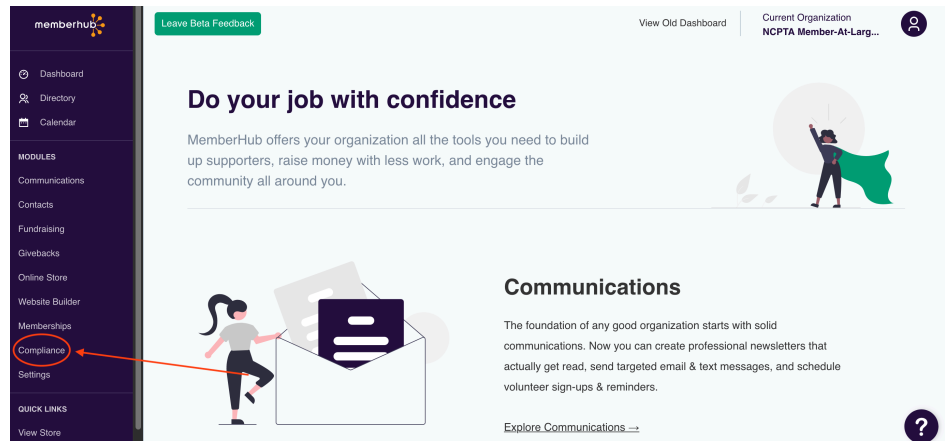
Please Note: This confirmation does not replace the actual filing of the Form 990 with the IRS due by November 15 of each year.

To submit the **Form 990 confirmation**, you must be an Admin. Your MemberHub "Admins" should be the Officers and/or Board Members of your PTA.

How to give admin access:

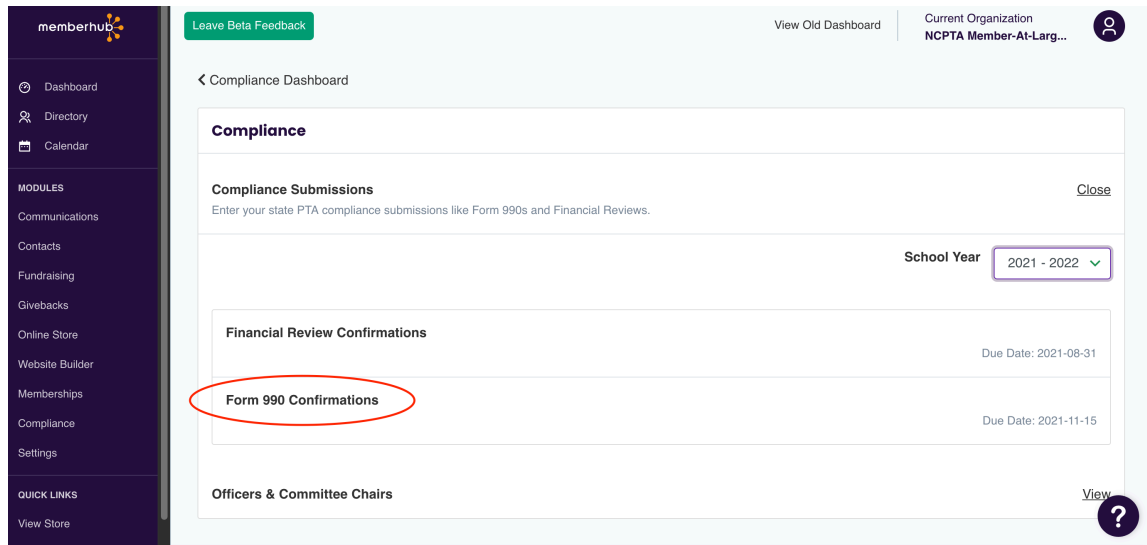
Please click **Contacts** on the left menu, click **Manage Contacts** and search for the user in the search box. Once you find the user's name, click the 3 dots next to their name and click add role from the pop up menu. Choose **Admin** from the Role name drop down box. Click **Save**.

Administrators for your PTA MemberHub site will see a tab called **Compliance on the left side menu**. Clicking on that tab gives you access to various to PTA-specific



compliance duties that keep your unit in good standing.

After clicking the **Compliance** tab, click **Submissions**. This will bring you to the compliance dashboard. Click **Form 990 Confirmations**

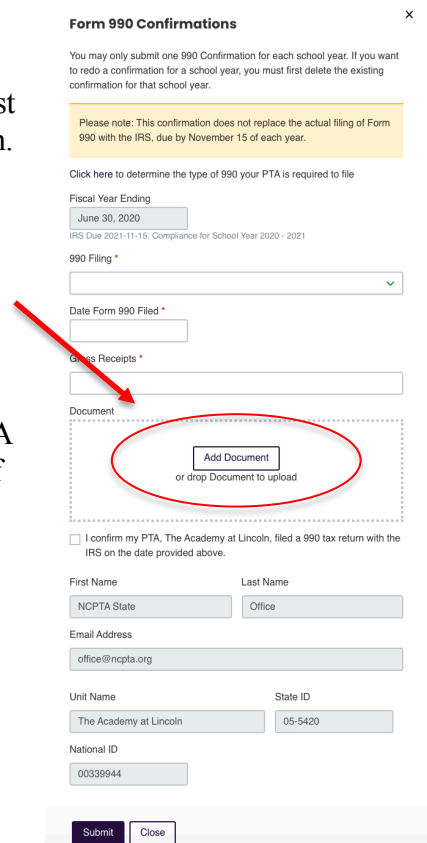


The resulting popup window will allow you complete the form and post the new confirmation. Then just click the **Submit** button on the bottom. Note: Once a confirmation has been submitted you can go back and view the confirmation.

***New Feature: “Document”**- MemberHub now allows your PTA to submit the actual financial review “document” that your Audit Committee provides to your PTA Board for the PTA’s permanent records. It is NOT required to upload the physical document into MemberHub but it is highly recommended. This will provide your PTA another location to store the fiscal document and reduce the chances of it getting lost. No worries as leadership changes. All admins will have access to historical compliance documents.

Editing a Confirmation

The Form 990 Confirmation **cannot** be changed after you click the “Submit” button. If you need to make a change and/or delete the Confirmation information, please submit a ticket to support@memberhub.com.



This confirmation must be completed by **November 15** of each year in order to remain a unit in good standing with NCPTA.

The 990 return must be filed with the IRS and this confirmation must be entered by November 15 of each year in order to remain a unit in good standing with NCPTA.

For more information, please visit <https://www.irs.gov/charities-non-profits/annual-electronic-filing-requirement-for-small-exempt-organizations-form-990-n-e-postcard>