

Corona-Norco Council PTA Monthly Unit Documentation 2024-2025			
<i>*Italicized and Highlighted Items are MANDATORY*</i>			
Forms may be accessed at www.coronanorcocouncilpta.com	Points Possible	Date Turned In	Ponts Received
August			
Historian Hours - July	1		
June EBM Minutes	1		
June Treasurer's Report	1		
June Bank Reconciliation	1		
July EBM Minutes	1		
July Treasurer's Report	1		
July Bank Reconciliation	1		
<i>Annual Financial Report</i>	3		
Board-Elect Attendance - CNCPTA June General Association Meeting - 1 point per person			
September			
Historian Hours - August	1		
August EBM Minutes	1		
August Treasurer's Report	1		
August Bank Reconciliation	1		
Membership Dues	1		
Membership Totals - Manual and TOTEM	1		
Approved Budget w/Date Adopted	1		
Approved Calendar w/Date Adopted	1		
General Association Minutes	1		
General Association Treasurer's Report	1		
General Association Secretary's Report	1		
<i>Year End Financial Review</i>	5		
<i>Professional Governance Standards</i>	3		
<i>Conflict Whistleblower Forms (signed by all members)</i>	1		
October			
Historian Hours - September	1		
September EBM Minutes	1		
September Treasurer's Report	1		
September Bank Reconciliation	1		
<i>Membership Dues and Roster</i>	1		
Membership Totals - Manual and TOTEM	1		
<i>Adopted Financial Review Cover Page w/Dates Adopted by Board and Association</i>	1		
<i>Copy of Tax Form 990N/990EZ Filing</i>	1		
<i>Copy of Tax Form 199N/199 Filing</i>	1		
<i>Copy of RRF-1 w/CT-TR-1 (if applicable) Filing</i>	1		
Attendance - CNCPTA September General Association Meeting - 1 point per person			
Advocacy/Outreach Assessment \$100.00			
Council Assessment Fee (\$200.00 Elementary/Academy - \$100.00 Intermediate/High School)			
Signed Reflections Agreement			
November			
Historian Hours - October	1		
October EBM Minutes	1		
October Treasurer's Report	1		
October Bank Reconciliation	1		
Membership Dues	1		
Membership Totals - Manual and TOTEM	1		
Reflections Entry Submissions	1		

December			
Historian Hours - November	1		
November EBM Minutes	1		
November Treasurer's Report	1		
November Bank Reconciliation	1		
Membership Dues	1		
Membership Totals - Manual and TOTEM	1		
<i>Insurance Premium - pay directly to AIM</i>	1		
<i>Worker's Compensation - send directly to AIM</i>	1		
Attendance - CNCPTA November General Association Meeting - 1 point per person			
January			
Historian Hours - December	1		
December EBM Minutes	1		
December Treasurer's Report	1		
December Bank Reconciliation	1		
General Association Minutes	1		
General Association Treasurer's Report	1		
General Association Secretary's Report	1		
Membership Dues and Roster	1		
Membership Totals - Manual and TOTEM	1		
<i>Insurance Premium - pay directly to AIM</i>	1		
<i>Worker's Compensation - send directly to AIM</i>	1		
February			
Historian Hours - January	1		
January EBM Minutes	1		
January Treasurer's Report	1		
January Bank Reconciliation	1		
Membership Dues	1		
Membership Totals - Manual and TOTEM	1		
<i>Mid-Year Financial Review Report</i>	5		
March			
Historian Hours - February	1		
February EBM Minutes	1		
February Treasurer's Report	1		
February Bank Reconciliation	1		
Membership Dues	1		
Membership Totals - Manual and TOTEM	1		
<i>Historian Annual Report (Estimate hours for March - June)</i>	1		
April			
March EBM Minutes	1		
March Treasurer's Report	1		
March Bank Reconciliation	1		
Membership Dues	1		
Membership Totals - Manual and TOTEM	1		
Convention Attendance	1		
Council Founder's Day Reservations Form with Payment	1		
Attendance - CNCPTA March General Association Meeting - 1 point per person			
<i>Board-Elect Unit Rosters with emails and phone numbers</i>			
May			
April EBM Minutes			
April Treasurer's Report			
April Bank Reconciliation			
General Association Minutes			

General Association Treasurer's Report			
General Association Secretary's Report			
Membership Dues			
Membership Totals - Manual and TOTEM			
Bonus Point - All Elected Executive Board contact information entered into myPTEZ	1		