



December 11, 2025 Unit Documentation Form

Documents for Outstanding Unit Points must be uploaded by 12/11/2025 no later than 11:59pm

All forms are located at www.coronanorcouncilpta.com

CA State PTA requires you to upload your compliance documents into your units MY PTAEZ account

Here are a couple of video tutorials on how to upload your units documents into your my ptez account.

My ptez <https://www.myptez.com/>

Please note that EVERY UNIT needs to upload their compliance documents every year into my ptez per CA State PTA. The president can have free access to upload compliance documents. If you need access email president@coronanorcouncilpta.com and/or leadership@coronanorcouncilpta.com

These documents include:

Workers Comp, Taxes, Annual financial report, Bylaws, Year End Financial Review (Audit 01/01/xx-06/30/xx), Mid year financial review (Audit 07/01/xx-12/31/xx) Bylaws, Bylaw signature page (signed adopted by board AND Association), Adopted Budget.

<https://www.myptez.com/tutorials/documentmanagement/>

Resources to help:

You can find forms and tax information on our website www.coronanorcouncilpta.com

PTA Leadership Toolkit: <https://capta.org/pta-leaders/run-your-pta/toolkit/>

Online membership: <https://jointotem.com/>

PTA EZ: <https://www.myptez.com/>

E-bylaws: <https://capta.org/pta-leaders/services/ebylaws/>



If you need help completing any tasks please reach out to us help@coronanorcocouncilpta.com

president@coronanorcocouncilpta.com [Switch account](#)



The name, email, and photo associated with your Google account will be recorded when you upload files and submit this form

*** Indicates required question**

Email *

Your email

Unit Name *

Your answer

Your name/position *

Your answer

Historian Hours - November

1 point

Your answer

Minutes - November EBM

1 point

Upload 1 supported file. Max 10 MB.

[Add file](#)



Treasurers Report - November

1 point

Upload 1 supported file. Max 10 MB.

 Add file

Bank Reconciliation - November

1 point

Upload 1 supported file. Max 10 MB.

 Add file

Membership Dues

- I have forwarded up payment for manual collection dues \$6.25 per membership to Corona-Norco Council PTA
- No, I have not forwarded up payment but will ASAP
- No, we have not collected any manual memberships

Upload your membership roster - Include ALL members from both TOTEM and manual envelope collection

4 points

Upload 1 supported file. Max 10 MB.

 Add file

Membership Total - Be sure to include both your Totem and envelope collection in your count

2 points

Your answer



Insurance Premium - Paid directly to AIM (email will be sent to both the president AND treasurer listed in PTEZ)

3 points

- Yes, we have paid our premium
- No, but will make payment ASAP
- We have financial hardship and would like Councils help

Upload Copy of your Workers Compensation Form - Mandatory Compliance Document Required for ALL units to complete

5 points

Instructions to complete will be sent to president AND treasurer listed in PTEZ

Upload 1 supported file. Max 10 MB.

 Add file

Attendance CNCPTA November GAM - 1 pt per person in attendance

Note: Attendance will be verified by sign in sheet from meeting

Your answer

A copy of your responses will be emailed to the address you provided.

Submit

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