

NEWSFLASH

Michigan PTA's Newsletter For Leaders

Special Edition April 2021

WHAT'S INSIDE



**The 990 Edition for
Presidents and Treasurers**

'TIS THE SEASON! OR IS IT?

WARNING! YOUR FISCAL YEAR MIGHT NOT BE WHEN YOU THINK IT IS!

Many of our units have a fiscal year which ends on December 31. For these units, their 990 must be submitted to the IRS before May 15. Most of these units only file the super-simple 990-N (also called the Postcard).

How do you know when your fiscal year ends? Don't check your bylaws---you have to check with the IRS! If your PTA has ever filed a 990N late, even if it was years ago, the IRS may have moved your fiscal year back six months. So you may think your fiscal year ends in June, but surprise! It actually ends in December! And what the IRS says is what counts, not what your bylaws say.

You can tell if your fiscal year has changed by going to <https://apps.irs.gov/app/eos/> and using the Online Search Tool. Enter your EIN where it says "Search By" and click on Search. Click on the result from the most recent tax year, and check out the tax period date range.

This is a really important thing to verify, because your 990 is due within 4 months and 15 days after the end of your fiscal year, every year.

If you need help with this, please call Michigan PTA at 734-975-9500.

Form 990-N (e-Postcard)

Organizations who have filed a 990-N (e-Postcard) annual electronic notice. Most small organizations that receive less than \$50,000 fall into this category.

Tax Year 2019 Form 990-N (e-Postcard)

Tax Period: 2019 (01/01/2019 - 12/31/2019)	Mailing Address: 19301 Wl Twelve Mile Lathrup Village, MI 48076 United States	Gross receipts not greater than: \$50,000
EIN: 38-2559976	Principal Officer's Name and Address: Celestine Sanders 25554 Mulroy Drive Lathrup Village, MI 48076 United States	Organization has terminated: No
Legal Name (Doing Business as): Ptssa Michigan Congress Of Parents Teachers And Students		Website URL:

Tax Year 2018 Form 990-N (e-Postcard)

Tax Period: 2018 (01/01/2018 - 12/31/2018)	Mailing Address: 19301 12 Mile Road Lathrup Village, MI 48076 United States	Gross receipts not greater than: \$50,000
EIN: 38-2559976	Principal Officer's Name and Address: Celestine Sanders 25554 Mulroy Drive Lathrup Village, MI 48076 United States	Organization has terminated: No
Legal Name (Doing Business as): Ptssa Michigan Congress Of Parents Teachers And Students		

The circled area on the screenshot above shows where you will find your fiscal year end date

Need to File Your 990?

So you found out the IRS says your fiscal year actually ends in December, and you need to file. How do you go about filing? Well, if your PTA made less than \$50,000 last year, you get to file the super-simple 990-N. This is an on-line form, which is easy to use.

Go to <https://www.irs.gov/charities-non-profits/annual-electronic-filing-requirement-for-small-exempt-organizations-form-990-n-e-postcard>, where you can learn more about 990s. Scroll down to "How to Register and Submit Form 990-N". There is a link to a user guide, which will walk you through the process step-by-step; <https://www.irs.gov/pub/irs-pdf/p5248.pdf>.

Form 990-N is easy to complete. You'll need only eight items of basic information about your organization.

- Employer identification number (EIN), also known as a Taxpayer Identification Number (TIN).
- Tax year (calendar or fiscal filer)
- Legal name and mailing address
- Any other names the organization uses
- Name and address of a principal officer
- Website address if the organization has one
- Confirmation that the organization's annual gross receipts are \$50,000 or less
- If applicable, a statement that the organization has terminated or is terminating (going out of business)

For more information about these items, see Form 990-N: Information Reported.

OKAY, YOU'VE FILED WITH THE IRS. NOW WHAT?

Congratulation! You have fulfilled a major obligation just by filing. Now you need to upload the confirmation form from the IRS. You do that from inside MemberHub. Remember, only do this AFTER you have submitted your 990 to the IRS.

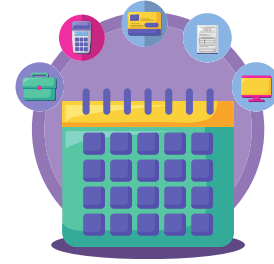
Log in to MemberHub in the usual way, and access your Admin Console. From the list on the right, select Form 990 Submissions. Click the blue button, and complete the information. Then click Submit. Next, go to the list on the right again, and choose Compliance Documents. This will allow you to upload the actual 990 or confirmation letter to MemberHub for storage. Note that you no longer need to send your documents to Michigan PTA for storage; you will have access to your important PTA documents directly from MemberHub!



Financial worksheets and templates are available at:

michiganpta.org/pta-leader-resources

- Audit worksheet AUTOMATED
- Audit worksheet Spanish AUTOMATED
- Audit worksheet MANUAL
- Sample Annual Treasurer Report Template
- Sample Monthly Treasurer Report
- Sample Budget MiPTA AUTOMATED



HOW DOES A TREASURER WRAP UP THE YEAR?

Congratulations, you made it through the year! Hopefully, you have everything ready to hand over, and a new Treasurer to hand them to. Or maybe you're up for another year of service—go you!

A Treasurer should arrive at the final meeting of the fiscal year with a year-end report. If your fiscal year ends in June, it's time to pull that together. It should look a lot like your budget did in the beginning of the year; but that was for planning, and this report shows how things actually went.

Gather the year's worth of bank statements, the checkbook register, and all your receipts and documentation. This will be used by the Audit Committee to conduct a year-end financial review, sometimes called an Audit. The Treasurer should not conduct the financial review, but should be available in case questions arise.

As always, remember to submit your Audit/Financial Review using MemberHub. Log in to MemberHub in the usual way, and access your Admin Console. From the list on the right, select Audit Submissions. Click the blue button, and complete the information. Then click Submit. Next, go to the list on the right again, and choose Compliance Documents. This will allow you to upload the audit sheet to MemberHub for storage. Note that you no longer need to send your documents to Michigan PTA for storage; you will have access to your important PTA documents directly from MemberHub!

At the end of the year, the Treasurer has a few other duties: S/He should present the year-end Treasurer's Report and Financial Review to the membership for approval. If there is a new incoming Treasurer, the outgoing Treasurer should accompany them to the bank, to add the new person as a check signer, and remove their own name. (Same goes for the President and other check signers.)

Please be kind to your new Treasurer, and show them the ropes. Remember what it was like when you were starting out. Share your email address or phone number, so they can ask you questions. We are all growing and learning, not just our kids!

Celebrate Your Accomplishments!

Michigan PTA offers a wide variety of awards and certificates to recognize the remarkable work of volunteers. Awards are presented at the annual convention.



This award recognizes PTAs/PTSAs that have implemented programs to improve the home/school health climate



Has your unit worked on any health related initiatives this year? You may qualify to apply for the Healthy Lifestyles Award!

For details visit michiganpta.org/state-pta-awards

Apply Now!



This award recognizes PTAs/PTSAs that have implemented programs to bring more male involvement into their schools.



For details visit michiganpta.org/state-pta-awards

Apply Now!



This award recognizes PTAs/PTSAs that have had an especially successful membership campaign this year.

Did your unit:

- Increase the number of members?
- or use a unique approach?
- or involve staff?
- or connect with in-person and virtual parents?



Let us know the amazing membership campaign ideas and results!

For details visit michiganpta.org/state-pta-awards

Apply Now!



This award recognizes PTAs/PTSAs that excel at communicating with their community.

Is your unit a communications rockstar?

Tell us about it!



For details visit michiganpta.org/state-pta-awards

Apply Now!



This award recognizes exemplary PTA-related and community participation by an individual member in a Council or Unit

Does your unit or council have a real superstar on your team?

Someone who does remarkable things in PTA and their community?

Tell us about it!



For details visit michiganpta.org/state-pta-awards

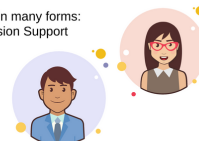
Apply Now!



This award recognizes school or district administrators that foster strong relationships with the school community (parents, students, staff), demonstrate advocacy efforts on behalf of public education, and maintain a strong affiliation with the local PTA.

Champions for children come in many forms:

- Diversity, Equity and Inclusion Support
- Principals/Vice Principals
- Career Tech Coordinators
- Superintendents
- Technology Support
- Communications
- Special Education
- and more



Does your unit or council have a champion involved in bettering the lives of children? Tell us about it!

For details visit michiganpta.org/state-pta-awards

Apply Now!



This award recognizes exemplary PTA-related and community participation by an Educator or Staff member during the school year.

Champions for children come in many forms:

- Educators
- Office Staff
- Counselors
- Cafeteria Workers
- School Nurses
- Maintenance Workers
- Noon Aides
- and more



Does your unit or council have a champion involved in bettering the lives of children? Tell us about it!

For details visit michiganpta.org/state-pta-awards

Apply Now!



For a complete list of awards and certificates visit:
michiganpta.org/state-pta-awards

We've
Launched
Our
New
Website!



Featuring refreshed and expanded resources and tools for PTA members and leaders including:

- Advocacy
- COVID-19 Related Advocacy
- Diversity Equity Inclusion
- Resolutions & Positions
- Advocacy Alerts
- Student Involvement
- Every Student Succeeds Act
- Our Mission and Vision
- Important Dates
- MiPTA Board of Directors
- PTA History
- COVID-19 Resources
- Purchase PTA Branded Items
- Join PTA
- How Dues Are Used
- Reflections Program
- Fran Anderson Scholarship
- Michigan PTA Newsletter
- 103rd Annual Convention

And the new PTA Leader Site!

- PTA Leader Materials
- MemberHub Guides
- Membership Challenges
- State Committees
- State PTA Awards
- Appreciation Awards

Michiganpta.org



THIS IS Mi --- PTA

Save the Date!

103rd Annual Convention
Saturday, August 7-8, 2021

Important Dates to Remember

Unit and Council Renewal and Officer Updates Begins June 1, 2020
in MemberHub (for 2020/21 this deadline is extended to Oct.1st)

Submit Board of Directors
Speaking/Visit Requests for Fall 2020 September 15
and Founders' Day Schedule

990 filing date with IRS (for most Units/Councils) November 15

Standards of Affiliation (SOA)* deadline
(Dues, Audit, Budget, Copy of 990, Officers, Bylaw, Insurance) December 1

Submitting Board of Directors January 15
Speaking/Visit Requests for Spring/Summer 2021

Submitting Resolutions for
consideration at Convention March 1

Fran Anderson Scholarship
Deadline April 1

Michigan PTA Awards Deadline April 15

**Satisfying Standard of Affiliation allows Units/Councils to participate
in all State and National Awards, Grants and Programs.**

Please note that when a Unit/Council applies for a National PTA award/grant/program, Michigan PTA is contacted before the award/grant/program is dispersed and if the Unit/Council has not satisfied the Standards of Affiliation (SOA), that entity will be disqualified for the award/grant/program, per Michigan PTA's affiliation agreement with National PTA.

Mailing Address
Michigan PTA
P.O. Box 510535
Livonia, Michigan 48151

734.975.9500
michiganpta.org

Join us on Facebook!

Facebook Page: facebook.com/everychildonevoice/

Facebook groups by interest:

- Michigan PTA Advocacy
- Michigan PTA Reflections Network
- Michigan PTA Diversity, Equity and Inclusion
- Michigan PTA Membership/Memberhub
- Michigan PTA Leadership Community



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- Michigan PTA Membership/Memberhub
- Michigan PTA Leadership Community

We're Here to Help

Although Michigan PTA does not have a physical office and no staff at the moment, volunteers are still available to help answer questions. How you can reach us:

734-975-9500

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Livonia, MI 48151

President- Kathy Carter
president@michiganpta.org

Secretary- Liz Jarvis
secretary@michiganpta.org

Treasurer- Dianna Sharpe
treasurer@michiganpta.org

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VP of Advocacy- Marcy Dwyer
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