



Local Unit Good Standing Compliance

608-244-1455
 info@wisconsinpta.org
 4797 W. Hayes, Suite 102, Madison, WI 53704

PTA Name: _____

Year: _____

| Good Standing Requirement | Officer/Chair Responsible | Due Date | Date Completed/How Submitted |
|---|--------------------------------|--|---|
| *Set up MemberHub site | President/Treasurer/Membership | Before Dues are Solicited | |
| Set up/change responsible parties in WePay section of MemberHub | President/Treasurer | Before Dues are Collected Annually/When account signers change. | |
| Submit Officer List via MemberHub | President | September 15 | |
| Remit Membership via MemberHub | President/Treasurer | 15 th of every month that dues are collected. | <input type="checkbox"/> Jul <input type="checkbox"/> Oct <input type="checkbox"/> Jan <input type="checkbox"/> Apr <input type="checkbox"/> Aug <input type="checkbox"/> Nov <input type="checkbox"/> Feb <input type="checkbox"/> May <input type="checkbox"/> Sep <input type="checkbox"/> Dec <input type="checkbox"/> Mar <input type="checkbox"/> Jun |
| Dues for at least 15 members remitted via MemberHub | President/Treasurer | November 1 | |
| Proof of Annual Financial Review (Audit)** | President/Treasurer | November 1 | |
| IRS Tax Filing—990EZ or 990N | Treasurer | November 15 | |
| Proof of IRS Tax Filing to WI PTA** | President/Treasurer | December 15 | |
| Review/revise Bylaws as needed to be approved by local membership & then submitted to WI PTA for review every 3 years. ** | President/Bylaws Chair | Every three (3) years 30 days prior to the month of expiration. (See current bylaws for date) | |

*Only needs to be done once.

**WI PTA is moving to all electronic files. These items can be uploaded on the website at www.wisconsinpta.org.



Local Unit Good Standing Compliance

Tips for Completion

608-244-1455
info@wisconsinpta.org
4797 W. Hayes, Suite 102, Madison, WI 53704

- If you need help setting up your MemberHub site, you have several options for help:
 - Visit the MemberHub Help Center for daily webinars at <https://support.memberhub.com/hc/en-us/articles/360005272513>
 - Contact your Region Advisor, if you do not know your region advisor, check the website at <http://wisconsinpta.org/region-advisor-map/>
 - Contact the WI PTA Office at 608-244-1455 or email info@wisconsinpta.org
 - Contact the Membership Chair, Paul Post at ppost@wisconsinpta.org
- WePay account set up—this will not only allow you to send in your membership dues, but this also gives you a store to allow your members to purchase items online. You have two options in your store (a) absorb the fee from WePay or (b) pass the fee on to your families—you choose. Sell memberships, spirit wear, and even tickets to your events!
- Simply add your officer lists under the admin console and choose PTA (if you need to and the first menu item is Officers) If you do not have a full list, just list the ones that you do have. Feel free to email the office or your region advisor that you are still looking to fill these positions.
- Every month by the 15th login to your Memberhub and remit any new dues. Simply put a button. <https://support.memberhub.com/hc/en-us/articles/360006895253-How-to-pay-your-state-dues-in-MemberHub>
- Financial Review is you “audit” you will find more volunteers for the financial review committee than the audit committee. Every year in July (or when your treasurer changes) you should review your financial records up to that point (June 30). Three people that are not signers on the account should sit down and review your records and complete the [audit form](#) provided by WI PTA. You then login to your MemberHub and choose admin console then audit submissions then add audit submission and fill in the date that you upload/mail you audit into the WI PTA. You can then upload your submission at www.wisconsinpta.org or snail mail it in. I recommend emailing to your Region Advisor so that they know to look for it and uploading your audit to the everyone file of your MemberHub site. This document should be available to your members & non-members alike.
- Your PTA/PTSA/Council taxes need to be filed by November 15th. The WI PTA has an entire page dedicated to treasury information at www.wisconsinpta.org/treasurer-finances/ & specifically how to fill out a 990N online <http://wisconsinpta.org/wp-content/uploads/2015/10/HOW-TO-COMplete-THE-NEW-990N-POSTCARD-1.pdf>. Save a pdf copy of the online confirmation as
- Submit proof of filing through the WI PTA website at www.wisconsinpta.org.
- It is highly recommended that you upload this document to your PTA MemberHub everyone hub so that is transparent to everyone.
- Bylaws—you can find the template at https://wisconsinpta.sharepoint.com/:w:/r/_layouts/15/doc2.aspx?sourcedoc=%7BAC0564E8-175C-49B7-BD0E-10428A886C5E%7D&file=Local%20Unit%20Bylaws%20Version%202010-18.docx&action=default&mobileredirect=true&cid=2dc01cc7-1ff5-4a3a-b940-3982283e010a, your bylaws are due every 3 years and should be posted to your membership for 30 prior to acceptance vote. After acceptance in the year due please upload to www.wisconsinpta.org.
- Make sure you join the new WI PTA Leaders group at https://www.facebook.com/groups/WiPTALeaders/learning_content/. Ask questions, stay up to date on latest info, join us at leadership training and Convention 2020!