



# Local Unit Good Standing Compliance

## Tips for Completion

Good Standing Requirement	Officer/Chair Responsible	Due Date	Date Completed
Login/Create account in MemberHub	All Officers	ASAP	
Set up/change responsible parties in Stripe Account (third party card processor)	President/Treasurer	Before Dues are Collected Annually/When account signers change.	
Update Officer List & Admin privileges in MemberHub	President	No later than September 15	
Remit Membership via MemberHub	President/Treasurer	15 <sup>th</sup> 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 to the IRS	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)	

PTA Name: \_\_\_\_\_

Year: \_\_\_\_\_

\*\*Upload to the Compliance Tab in your MemberHub platform.



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- 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://info.memberhub.com/sessions>
  - 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](mailto:info@wisconsinpta.org)
- Officer lists are due in MemberHub each year by June 15<sup>th</sup> even if the information remains the same! Do not delete past officers as this is your historical record. From the Dashboard choose Compliance>Officers>Add Officer and then fill out the form that pops up. Feel free to email the office or your region advisor if you are still looking to fill any positions.
- Every month by the 15<sup>th</sup> login to your MemberHub and remit any new dues. From the Dashboard—choose Memberships>Remit State Dues. Please note: only the treasurer or president of your local unit can submit dues.
- Financial Review is your “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 [Fiancial Review Form](#) provided by WI PTA. You then login to your MemberHub and choose Compliance>Compliance Submission>Annual Financial Review/Audit>Submit and then fill in the form and upload the document.
- Your PTA/PTSA/Council taxes need to be filed by November 15<sup>th</sup>. The WI PTA has an entire page dedicated to treasury information at [www.wisconsinpta.org/treasurer-finances/](http://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 or a screenshot and then upload to MemberHub. From the Dashboard choose Compliance>Compliance Submission>Form 990 Submission>Submit and then fill in the form and upload the document.
- Bylaws—you can find the template at [wisconsinpta.org/bylaws](http://wisconsinpta.org/bylaws), your bylaws are due every 3 years and should be posted to your membership for 30 days prior to acceptance vote. After acceptance in the year due please upload MemberHub. From the Dashboard, Compliance>Compliance Submission>Bylaws>Submit and then fill in the form and upload the document.
- Make sure you join the new WI PTA Leaders group at <https://www.facebook.com/groups/WiPTALeaders> Ask questions, stay up to date on latest info, join us at leadership training and Convention 2023!