

INSTRUCTIONS FOR 990N (e-postcard) FILING

This form is due 4 1/2 months after the PTA's year end (for PTAs this is usually in the fall of the following school year). **However, to be in Good Standing with Texas PTA you must file within 60 days of year end. We strongly encourage all PTAs to file their return shortly after PTA year end and have the outgoing treasurer file the return since they are the individual who has been involved with the recordkeeping and will know the details to complete the questions.**

If your PTA has >\$50,000 in gross receipts, you cannot file a 990N. Please contact the ACPTA treasurer if you need additional information on the 990EZ or 990.

PTAs with gross receipts of < \$50,000:

Go to the following website: <https://www.irs.gov/990n>

In the paragraph titled "Ready to File?" is a link to begin your filing. Click through that link.

Do have a login? If Yes, skip steps 1 and 2. If no, start with step 1.

1. Select "First Time User"

Enter YOUR First and Last Name (even though it mentions the name as it appears on the Tax Return) and YOUR email address

Then select "Send Code"

You will get a code sent to your email.

2. Enter the code you are sent and you will be asked to create a User Profile

Create password, security questions etc. on this page

Once complete you will go to a page that says you have successfully completed the profile

Next you will move to a screen that says Electronically File your 990N

You will 1st need to Create Your E-Postcard Profile

On the Next Page you will add the EIN # for Your PTA.

Your EIN# will now be associated with your profile. NOTE: It will say something like "PTA Texas Congress" rather than your PTA since the local PTA is under the umbrella exemption of the Texas PTA.

3. If you skipped step 1&2, log in using your username and password and then select "Manage 990 Filings" and "create new filing" OR

If you completed steps 1&2, then you will select "Create New Filing" on the next screen

4. Next Screen is Organization Information

Answer the 2 questions: 1) has your organization gone out of business?

2) did you have less than \$50,000 in gross receipts?

5. Next Screen is Organization Address and Principal Officer Information

Enter Your PTA's name in DBA box

Add address for the PTA (I usually use the school's address)

Enter PTA President's Name for 2016-17 PTA Year (you can use the same address used for PTA address)

Select "Submit Filing", NOT "Save" (You can use Save to save what you have input if you need to verify something like an address, but Save will not submit your filing to the IRS)

6. After you submit the filing, log out and after 7 minutes, log back in. Go to the "Manage Form 990 Submissions" and click on the manage submissions button. Your 990 submission should show up here. If it says "Accepted", you are done, if it says "Pending", click on that says something like "get status update". If you do that, status should change to "Accepted".

Congratulations! You have filed your 990! Download/take a screen shot of the **accepted 990** filing screen for the PTA's records. Make sure and print a copy to keep in your treasurer's file. This will be needed for the financial review. 990 filings should also be kept permanently by the PTA.

QUESTIONS? Contact ACPTA Treasurer Kim Belew, treasurer@austincouncilpta.org or 512-815-6888