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### PTA/PTSA Good Standing Checklist

*All necessary forms can be found in the Members Only section of the Arizona PTA website.  
You **do not** have to mail this to Arizona PTA—this is for your purposes*

#### Send to Arizona PTA by June 30 each year:

**Current Officer's List**  YES  NO  
-Even if officers don't change from previous year,  
send new form each year and when changes occur.  
Also, send a copy within 10 days of change of officers.

**Payment of Liability Insurance Renewal**  YES  NO  
-Check should have 2 signatures  
-Must use new form found at [http://azpta.org/members/leader\\_forms/insurance/](http://azpta.org/members/leader_forms/insurance/)

#### EMAIL to Region Director by September 30 each year:

**Standing Rules/Bylaws Review**  YES  NO  
-Performed at first general meeting  
-Send Meeting Minutes showing adoption

**Current School Year's Budget**  YES  NO  
-Adopted by membership  
-Send Meeting Minutes showing adoption

**Financial Review (Audit) Report**  YES  NO  
-Adopted by membership at first meeting  
-Send meeting minutes showing adoption

**Mandatory Training Completed**  YES  NO  
-All board officers must have completed training  
either via Convention, Summer Boot Camp or  
Arizona PTA e-Learning.

#### Send to Arizona PTA by November 15 each year:

**Federal Tax Filing** (send copy to AZPTA after filing)  YES  NO  
-990N (epostcard) if gross is less than \$50K  
-990EZ if gross is greater than \$50K but less than \$200K  
-990 if gross is greater than \$200K

#### Send to Arizona PTA by the 30<sup>th</sup> of EACH MONTH

**Membership Roster and Dues**  YES  NO  
-Send copy of membership roster EACH MONTH  
-Remit \$4.50 annual dues PER MEMBER who joined that month  
-If no new members joined that month, indicate ZERO on  
the membership report form.  
-[http://azpta.org/members/leader\\_forms/membership-dues-payment/](http://azpta.org/members/leader_forms/membership-dues-payment/)