

This SOA checklist will help you remain current with all IRS, state, insurance, and PTA requirements. Questions? Contact your LPTSA Council liaison or email us at lptsacouncil@gmail.com

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Required by	#	Requirement	Due by	Specifics	Board Member Responsible	Date Completed
State of Michigan	1.	Officers Elected	June 1	Officers elected by membership before fiscal year end. Michigan State law requires president, vice president, treasurer, and secretary. Upload to Givebacks.		
IRS	2.	Form 990 filed	Nov 15	File appropriate IRS form 990 at www.irs.gov no later than 4 months and 15 days following end of unit fiscal year (or file the necessary extension and file by the deadline). Upload to Givebacks.		
Michigan PTA	3.	Officer Names & Contact Info	June 1	Enter names and contact info for all elected officers and chairpersons such as membership, advocacy, DEIB, Reflections, YMAD, etc. in Givebacks		
	4.	Budget Approved	Dec 1	Budget was approved by the membership at first meeting. Upload in Givebacks.		
	5.	Proof of Form 990 Filing	Dec 1	Submit proof of 990 submission in Givebacks.		
	6.	Completed Audit	Dec 1	Submit completed Audit in Givebacks.		
	7.	Bylaws	Every 3 Years	Review and submit membership approved unit bylaws for review/approval every 3 years, or as needed to Givebacks. Minutes MUST BE included. Last submitted: _____		
	8.	Insurance	Dec 1	Submit proof of Insurance in Givebacks.		
	9.	Membership Invoices Paid	Monthly	Membership invoices paid in Givebacks by the 28 th of each month.		

Per MI PTA Bylaws, a unit in good standing is one that meets the criteria in the SOA agreement. This checklist is for your internal monitoring purposes and can be submitted to PEP BY DEC 1st for 500 PEP Points. Your unit is responsible for completing ALL SOA REQUIREMENTS before submitting to PEP.