Instructions for
Local PTA/PTSA Filing of

Only units that normally have gross receipts of $50,000 annually or less should file the 990-N.
Step 1

- Then click the link shown below to start the process.

Click this link to start your unit’s filing.
Step 2

This is the page you will begin to create a new profile on.

- For the 2015-2016 local unit filing ALL users will be new as this is a new system.
- New Treasurers or designated filers will need to create a new account as accounts are associated with the person filing for the organization.

Click this button to start creating your account profile.
Step 3

- Enter the information in for yourself. The person completing the 990-N ePostcard filing.
- Use your unit’s email address or your own. You will need access to this email address because a link from the IRS will be sent to it to activate your account.

Fill in your legal first and last name.

Use an email address you have access to.

Click here and you will receive a code in your email at the address you provided.
Step 4

- Check your email account. The IRS will have sent you an email with a code.
- Write down this code or copy it. You will need to paste or enter it into the next step.

Copy this code.

*The code is only good for 15 minutes*
Step 5

- Paste or enter the code from the email.
- Click Continue to proceed.
Step 6

- You now need to create a username and password. Follow the username and password guideline.
- Re-enter the password.
- Double check the primary email address at the bottom. Edit if necessary.
- CONTINUE SCROLLING DOWN THE PAGE FOR MORE ACCOUNT ENTERIES.

Choose a username and password.

Scroll down.
Step 7

- AS YOU CONTINUE SCROLLING DOWN THIS PAGE...
  - Choose a site phrase.
  - Choose a site image.
  - Create challenge questions.

Create a site phrase.

Click here to create a site image.

Create challenge questions and answers.

Scroll down.
Step 8

- CONTINUE SCROLLING DOWN THIS PAGE...
  - Complete your challenge questions and answers.
  - Click Continue when all information on this page is completed.

Complete all challenge questions and answers.

Click Continue when finished.
Step 9

- You have now created a user profile.
- *Make sure you save all your information or print it out so that when you file next year you can access your account again.*

Click Continue
Step 10

- Read the information and continue.

Click Continue
Step 11

- You now need to create an ePostcard Profile.
- You only need to do this the first time you use the IRS 990-N ePostcard filing system.
Step 12

- In the drop down you will select “Exempt Organization.”
- Click Continue to move on.
Step 13

- In the boxes you will add your unit’s Employer Identification Number (EIN).
- Your unit’s EIN can be found in your bylaws under Article XI or you can find it on your Healthy Unit in Good Standing (HUGS) reports.
- **DO NOT USE THE ALASKA STATE PTA EIN.**
Step 14

- For all units under the Alaska PTA 501c3 nonprofit umbrella, the Organization displayed will say “Alaska PTA.”
- Units that are NOT under the Alaska PTA 501c3 nonprofit umbrella and have their own 501c3 will have their unit’s name displayed.
- To continue click on create new filing.

You will see Alaska PTA displayed here.

Click Create New Filing.

Your unit’s EIN displayed here.
Step 15

- You have now created an ePostcard Profile.
- Click continue to proceed with your unit’s filing.

Click Continue to proceed.
Step 16

• Click in the drop down and select the organization you are filing an ePostcard for. **Alaska PTA** should be displayed and this is the one you will select.

• If your unit is not under the Alaska PTA 501c3 nonprofit umbrella and has its own 501c3, you will select your unit name.

In the drop down select Alaska PTA.
Step 17

- When “Alaska PTA” is displayed in the dropdown click continue.
- Your unit’s EIN will be displayed next to Alaska PTA.
- Units with their own 501c3 and not under the Alaska PTA 501c3 umbrella will have their unit name displayed.
Step 18

- Check or enter in the correct end of tax year filing date. Most units have the year ending date of June 30th.
  - If your unit’s is different, then this is the ending date that the IRS has for your unit. Please notify your Alaska PTA Region VP of a different date as we are trying to transition all units to a June 30th fiscal year end with their bylaws and the IRS. For now you will need to go with what the IRS has on file for your unit.
- Answer the other questions in the drop downs. The organization’s legal name is “Alaska PTA”. Leave the 2nd line under the organization name blank.
- Double check that the EIN is correct.

[Image of a computer screen with a screenshot of the IRS website where the user is filling out form 990-N.]

Select or check that you are filing for the correct end of year.
This should say Alaska PTA.
Leave blank.
Double check your unit’s EIN
Click Continue when all info is filled out.

Answer “No” unless your unit has disbanded or dissolved.
Answer “Yes” if your unit NORMALLY has gross annual earnings of $50,000 or less. If you have one year where you make a little more you can still enter “yes.”
Step 19

- Under Organization and DBA Name (*Doing Business As*) you will enter your PTA/PTSA unit’s name. Make sure to use the legal name. You do not need to use the 2nd line or hit the button to add additional DBA names.
- Fill in the country, city, state, and zip code for your unit.

Alaska PTA is displayed here.
Enter your unit’s name here.
Fill in the info for your unit.
Scroll down when completed.
Step 20

- Finish filling out the unit’s information.
- Fill out information for the Principal Officer. This is your unit’s President and their personal address info.
- When all fields are completed you will **SUBMIT** your 990-N ePostcard filing. *If you are not finished you can save the filing and come back to login and finish later.*
Step 21

- Congratulations! You have now submitted your unit’s 990-N ePostcard to the IRS.
- You may want to print this webpage as it has the proof that you have submitted the filing (date, EIN, Submission ID, tax year, etc.)
- You will notice at the bottom is says your filing is “PENDING.” Later once the IRS has accepted the filing it will say “ACCEPTED.”

Print this filing for your records.

Notice that your filing says “PENDING.”

The IRS has not yet ACCEPTED your unit’s filing.
Step 22

• When you have selected to print the following page will display. You will send a copy of this to Alaska PTA as proof of your unit’s filing. You can print a paper copy or when you go to print select “print to PDF” or “save as PDF.” A PDF can be emailed to Alaska PTA.

• You will also save a copy of this in your unit’s files as proof of your filing.

• Remember this document is required to be open to Public Inspection. All nonprofits are required by law to provide a copy to the public when requested.

Send a paper copy of this or a PDF copy to Alaska PTA.
Step 23


• You are going to login in as “RETURNING USER”.

Click this link to get back into the login screen.
Step 24

- You will now login in as “RETURNING USER”.
  - Enter your username and login that you made when you created the account and user profile.
  - Click Log In to continue.
Step 25

- Your Site Image and site phrase will appear. These should match what you chose when you created your profile.
  - If you recognize the image and phrase as what you chose then enter your password.
  - Click SUBMIT to continue.

Verify this is the image and phrase below that you chose when setting up your profile.

Enter your password.

Click submit to continue.
Step 26

• After you enter your password and click submit the following screen will appear.
• Click Continue to proceed.
Step 27

- You want to select the button to MANAGE FORM 990-N SUBMISSIONS.
  - This will take you into your previously filed 990-N.

Click Manage Form 990-N Submissions.
Step 28

- Is the filing you submitted “ACCEPTED”? If the Status still says “PENDING” you may need to sign in again in a day or so. The status must say “ACCEPTED” to access the necessary information to send to Alaska PTA.
- If your filing has been “ACCEPTED” by the IRS proceed by clicking on your Submission ID.

Does this say “ACCEPTED”?  
Click on your submission ID

You do not need to create a new filing.
Step 29

- Verify that the filing status reads as “Accepted.”
- Print this page for your unit’s records.
- Print this page or “SAVE AS PDF”/“PRINT AS PDF” and send to Alaska PTA. This page is required for all units to submit as proof that the unit not only filed, but that the IRS has ACCEPTED the filing.

Verify that the Filing Status says “Accepted.”

Print this webpage for your records.

Send a copy of this webpage to Alaska PTA.
Send to Alaska PTA

- Send a copy of the 990-N as displayed on STEP 22.
- Send a copy of the IRS ACCEPTANCE as displayed on STEP 29.

- Alaska PTA provides the IRS 501c3 Nonprofit umbrella to local units. As such, Alaska PTA is required to keep these documents on file for all local units.

- The required documents can be mailed, emailed, or faxed to the Alaska PTA Office.

Problems? What to do.

- Contact your Region VP for Assistance
  - Region VPs can help you through the process OR
  - They know who can better assist you within Alaska PTA if they are unable to provide the answers or necessary resources.

- Contact the Alaska PTA Office
  
  **Open:** 9:30am-1:30pm Monday-Friday
  
  **Phone:** 907-279-9345
  
  **Fax:** 907-222-2401
  
  **Email:** office.akpta@gmail.com
  
  **Mailing Address:** PO Box 201496
  
  Anchorage AK 99520
  
  **Physical Address:** 555 Northern Lights Blvd. Suite #204
  
  Anchorage AK 99503