Alaska PTA®

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Chartered 1957

Instructions for Local PTA/PTSA Filing of IRS 990-N ePostcard

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

Step 1

- Go to the IRS Webpage for Small Exempt Organizations- Form 990-N (ePostcard): https://www.irs.gov/charities-non-profits/annual-electronic-filing-requirement-for-small-exempt-organizations-form-990-n-e-postcard

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

Annual Electronic Filing

https://www.irs.gov/charities-non-profits/annual-electronic-filing-requirement-for-small-exempt-organizations-form-990-n-e-postcard

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IRS

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- Churches & Religious Organizations
- Political Organizations
- Private Foundations
- Other Non-Profits
- Contributors

Charities & Non-Profits Topics

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- Calendar of Events
- Charity and Nonprofit Audits
- Free e-Newsletter
- Future Webinars and Recorded Events
- Life Cycle
- Taxpayer Bill of Rights
- Tax Exempt and Government Entities
- **Charities & Non-Profits Home**

Annual Electronic Filing Requirement for Small Exempt Organizations — Form 990-N (e-Postcard)

How to file

To electronically submit Form 990-N, *Electronic Notice (e-Postcard) for Tax-Exempt Organizations Not Required to File Form 990 or Form 990EZ*, use the Form 990-N Electronic Filing System (e-Postcard).

- The Form 990-N electronic-filing system moved from Urban Institute's website to IRS.gov in February. **All filers** must register at IRS.gov prior to filing their next Form 990-N. This is a one-time registration; you won't be asked to register again when filing next year.
- Form 990-N must be completed and filed electronically. **There is no paper form**.
- Form 990-N filers may choose to file a complete Form 990 or Form 990-EZ instead.
- Use the Form 990-N Electronic Filing System (e-Postcard) User Guide while registering and filing.
- For filing system and website issues, see How to File: Frequently Asked Questions. If site issues are unresolved, call TE/GE Customer Accounts Services at 877-829-5500. A representative will file your Form 990-N information.
- Organizations should continue efforts to file, even if late.

Prior to filing your form, please review the following information:

Who must file

Most small tax-exempt organizations whose annual gross receipts are normally $50,000 or less can satisfy their annual reporting requirement by electronically submitting Form 990-N if they choose not to file Form 990 or Form 990-EZ instead.

Exceptions to this requirement include:

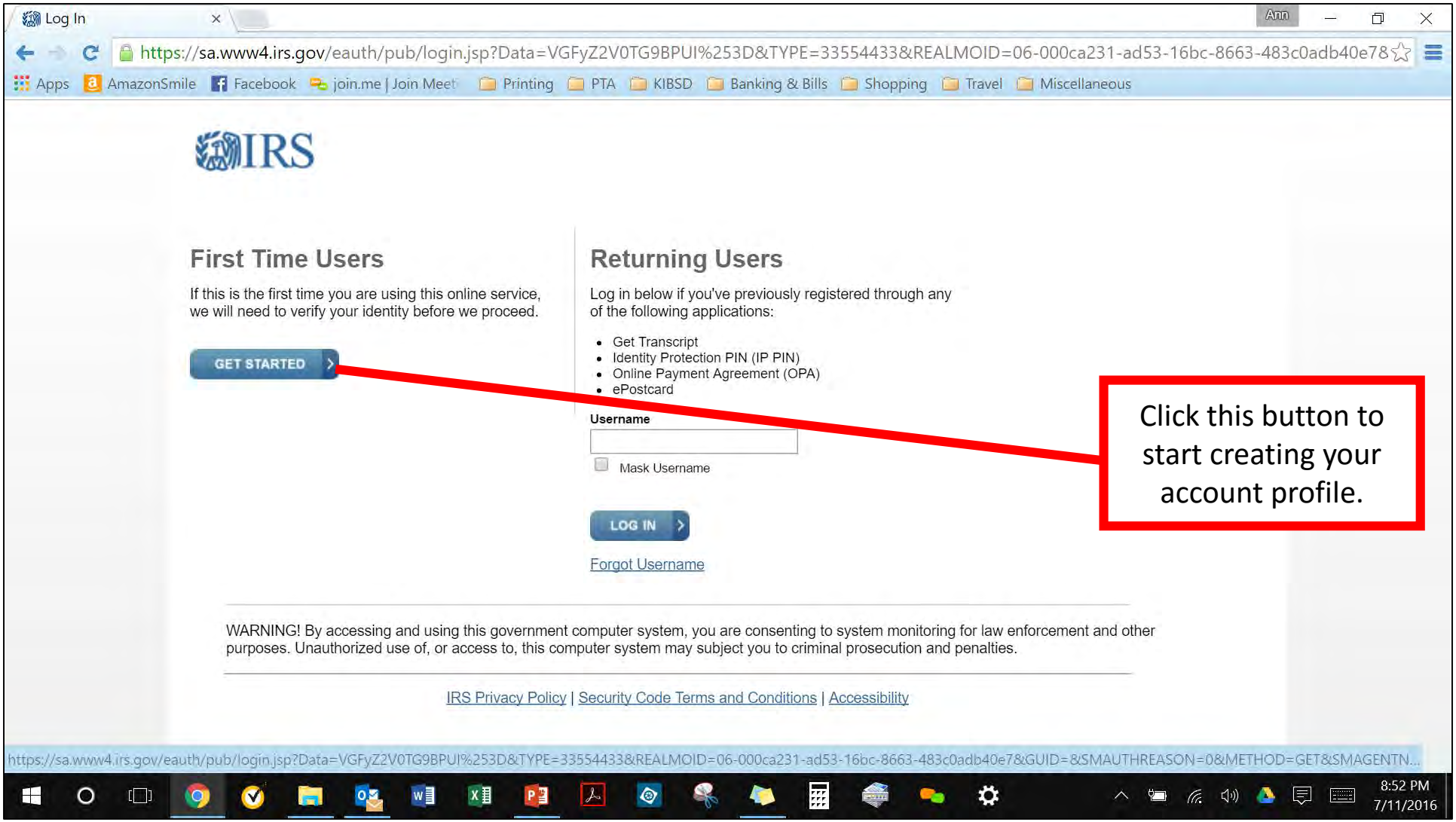
Click this link to start your unit's filing.

8:49 PM
7/11/2016

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.



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.

Let's Get Started!

https://sa.www4.irs.gov/eauth/pub/registration/prereg1.jsp

Apps | AmazonSmile | Facebook | join.me | Join Meet | Printing | PTA | KIBSD | Banking & Bills | Shopping | Travel | Miscellaneous

IRS

Let's Get Started!

It sounds like you have all the necessary information available and can begin.

First Name (as it appears on your most recent tax return)

Last Name (as it appears on your most recent tax return)

Email Address

A confirmation code will be sent to your email address. You will need to get the code and enter it on the next screen.

CANCEL | SEND CODE

IRS Privacy Policy | Security Code Terms and Conditions | Accessibility

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.

https://sa.www4.irs.gov/eauth/pub/registration/prereg1.jsp#content

8:53 PM
7/11/2016

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.

Your IRS Online Services Email Confirmation Code

IRS.online.services@irs.gov 8:56 PM (21 hours ago)

to me

Your confirmation code is: 0000-0000

This code will expire in 15 minutes. Enter it into the Email Confirmation Code field as soon as possible to access your requested service.

This is an automated email. Please do not reply.

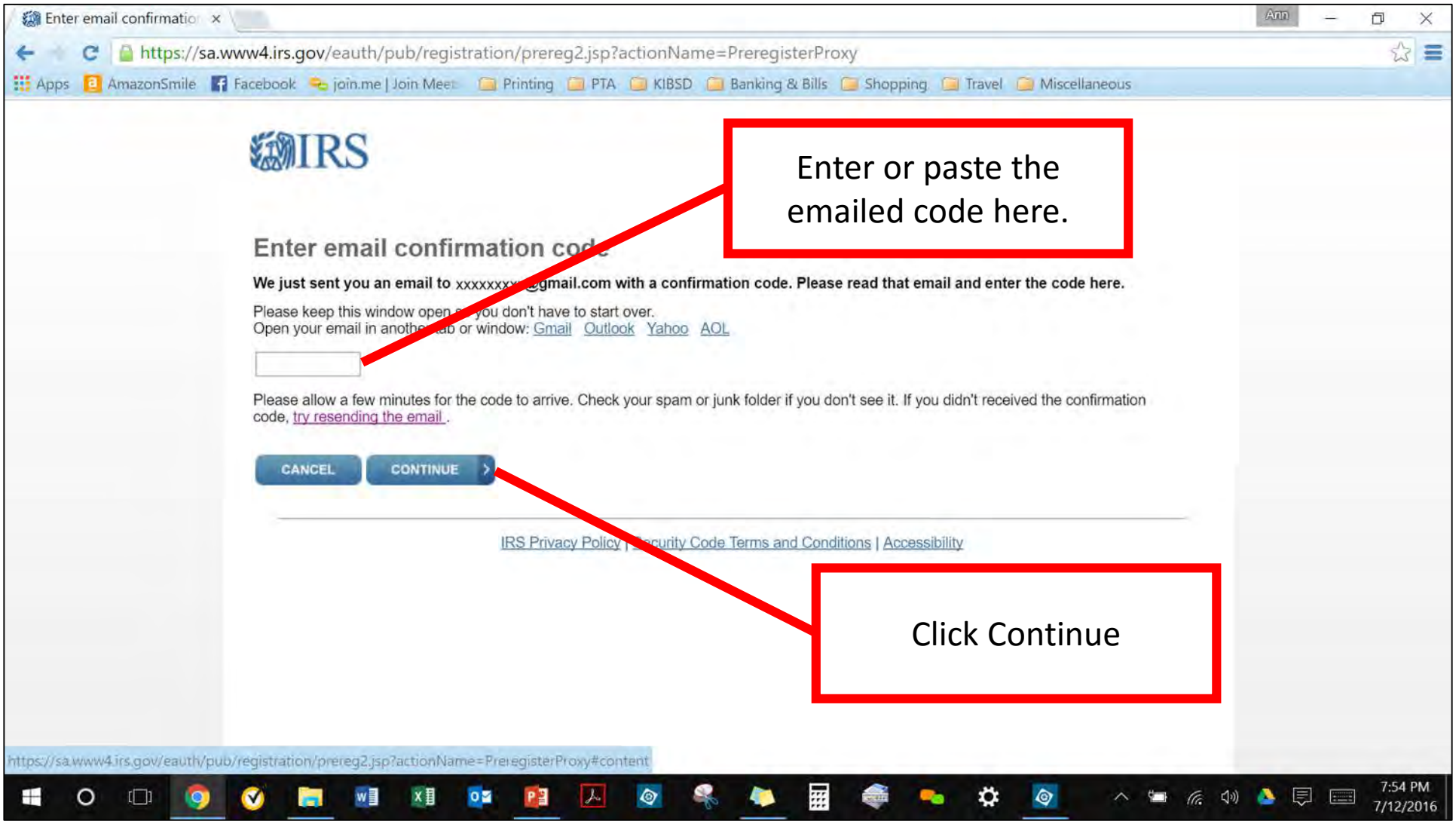
The IRS will never initiate contact through email asking taxpayers for personal or financial information.

Copy this code.

The code is only good for 15 minutes

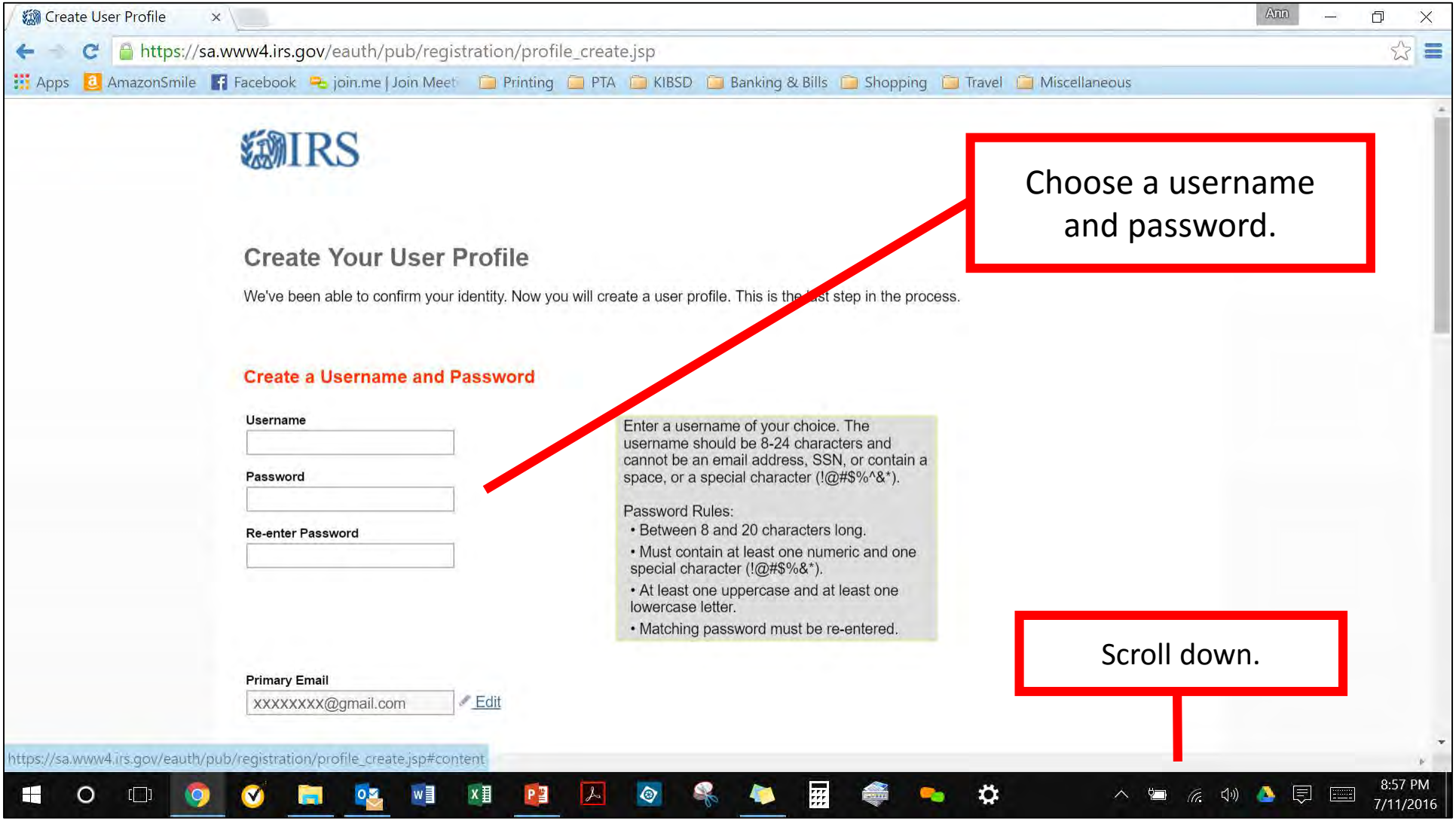
Step 5

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



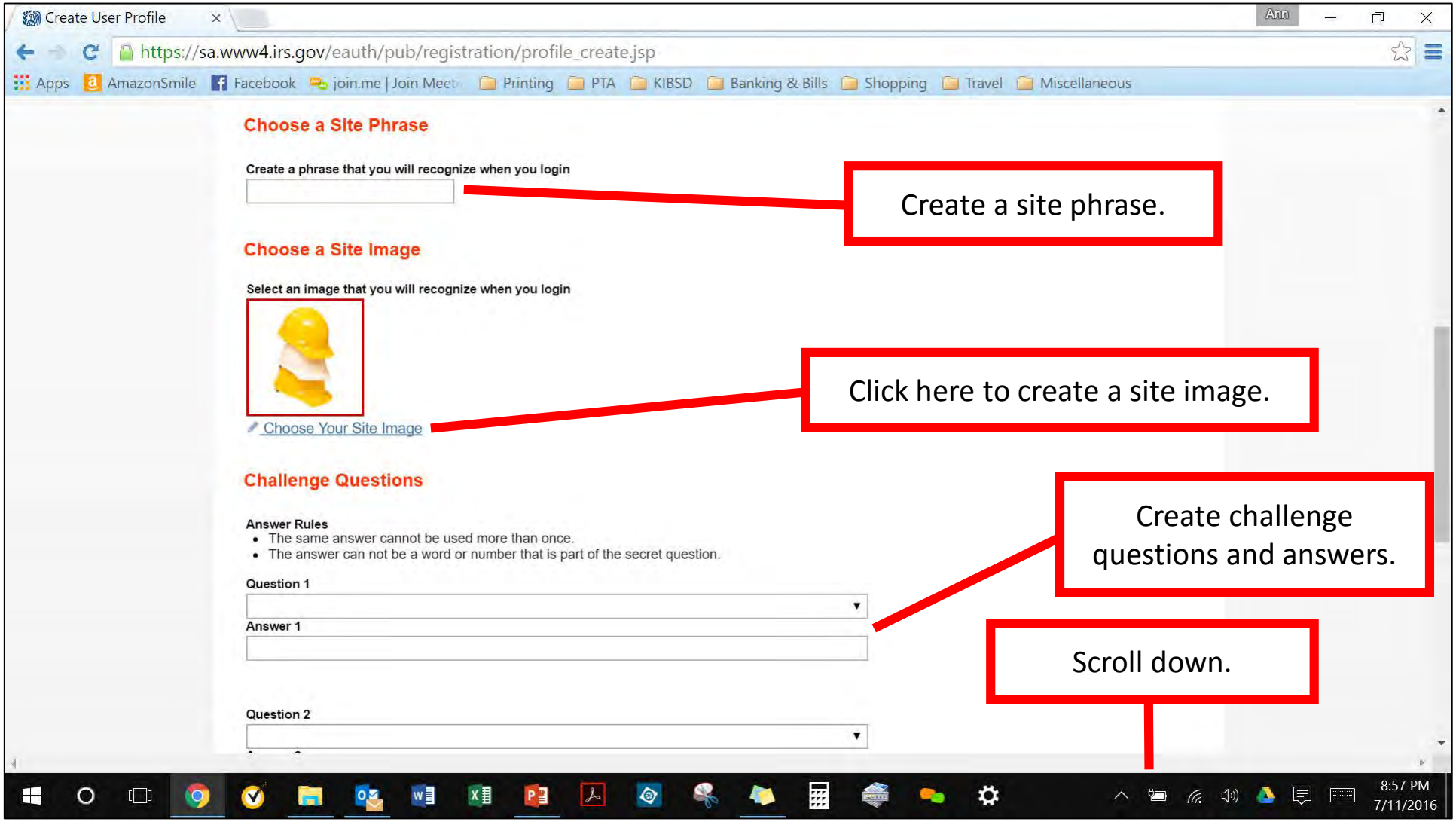
Step 6

- 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.



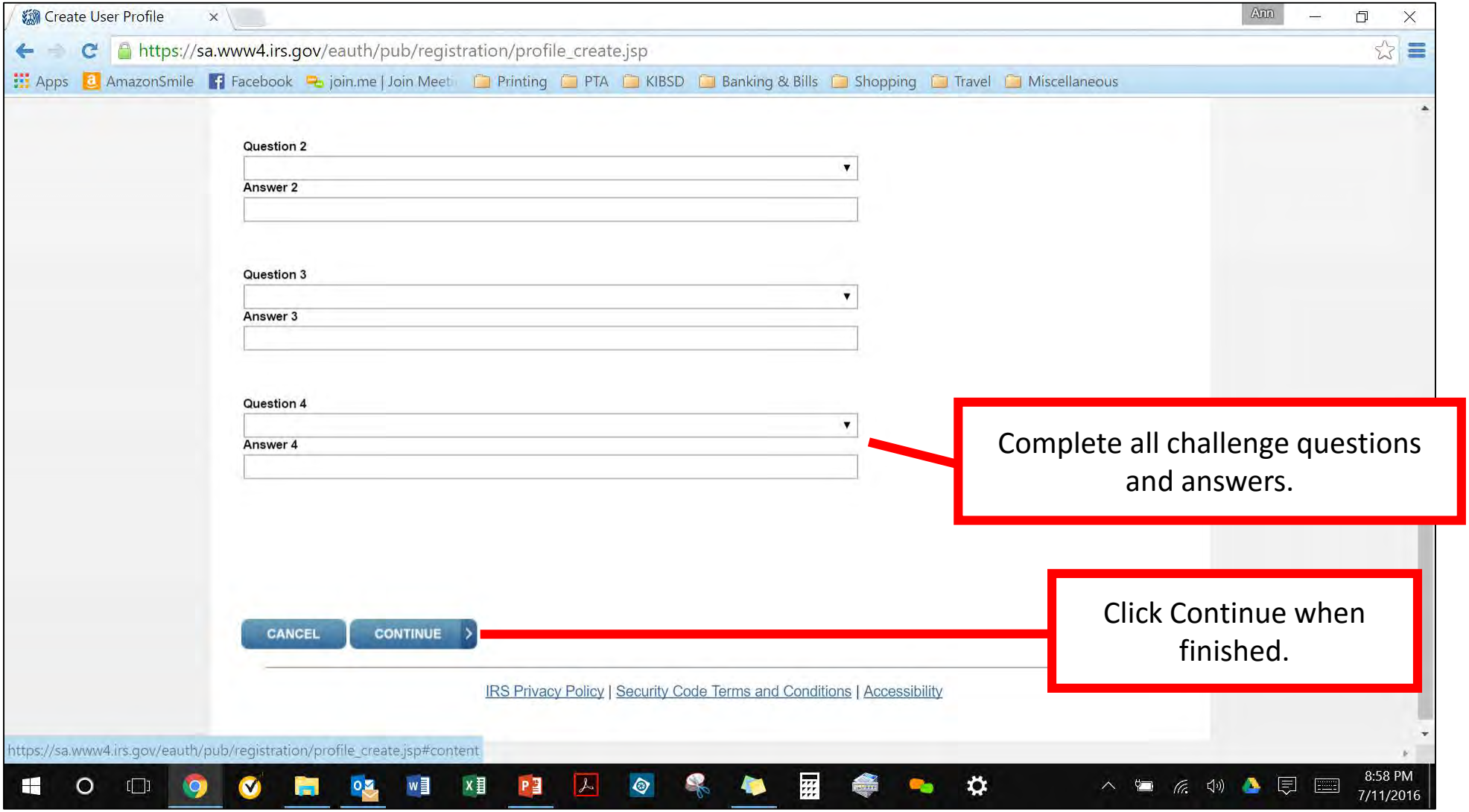
Step 7

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



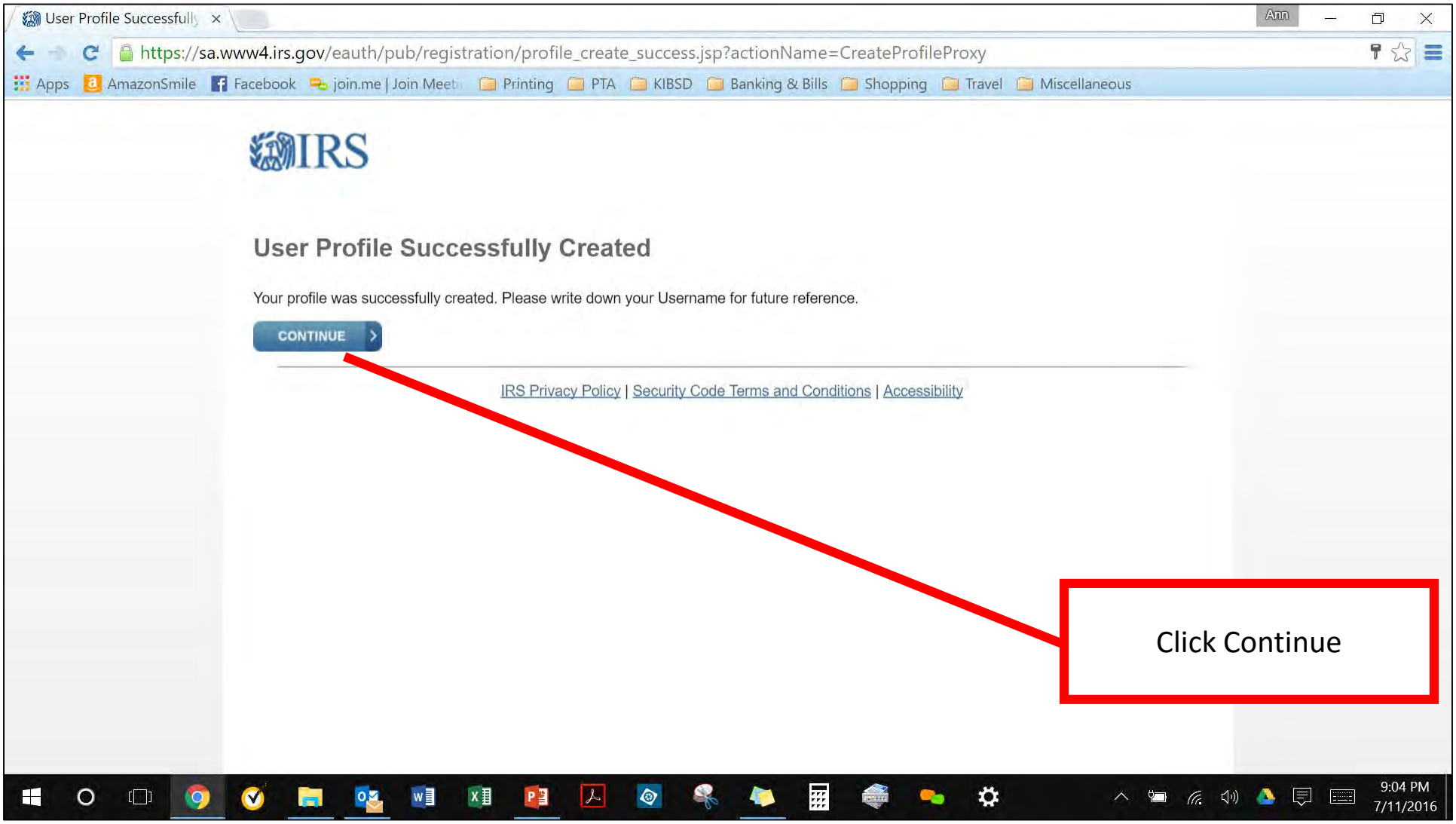
Step 8

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



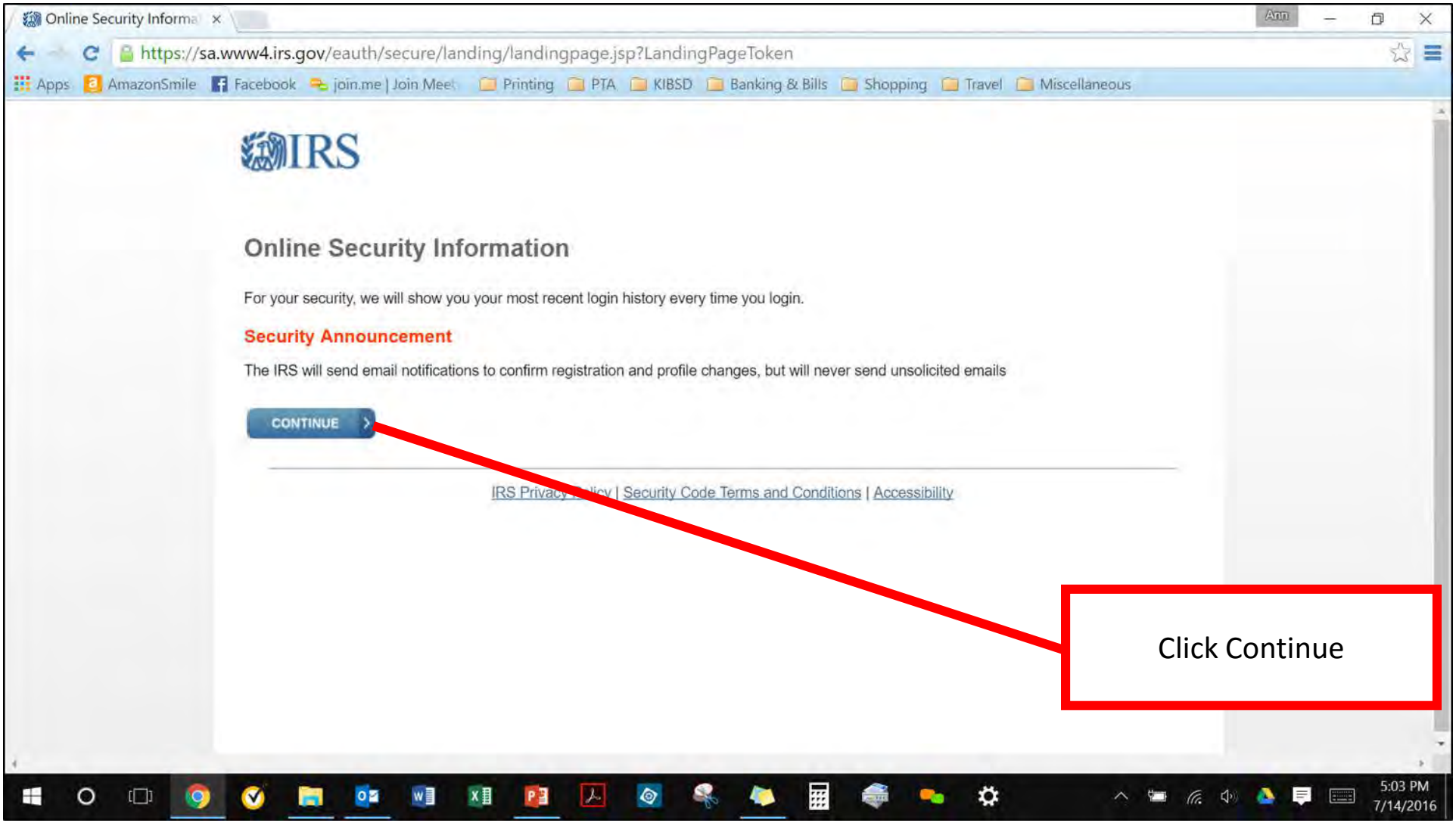
Step 9

- 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.*



Step 10

- Read the information and continue.



Step 11

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

e-Postcard Home

https://sa.www4.irs.gov/epostcard/secure/home/

Apps | AmazonSmile | Facebook | join.me | Join Meet | Printing | PTA | KIBSD | Banking & Bills | Shopping | Travel | Miscellaneous

IRS

Electronically file your Form 990-N (e-Postcard)

Home | Security Profile | Logout

e-Postcard Profile

Before you can create a Form 990-N (e-Postcard), you must create your e-Postcard Profile. Your e-Postcard Profile allows you to:

1. Designate your e-Postcard Profile as either a "Preparer" or "Exempt Organization"
2. Add EINs to your e-Postcard Profile
3. Remove EINs from your e-Postcard Profile

More information on who must file a Form 990-N.

Once created, you can update your e-Postcard profile at any time. Click the button below to get started.

MANAGE E-POSTCARD PROFILE

Manage Form 990-N Submissions

Once your e-Postcard Profile is created, you can use the Manage Form 990-N Submissions page to:

1. Create a Form 990-N
2. View the status of your existing Form 990-N submission(s)
3. Edit an in-progress Form 990-N
4. Delete an in-progress Form 990-N

MANAGE FORM 990-N SUBMISSIONS

Click here to start your ePostcard Profile.

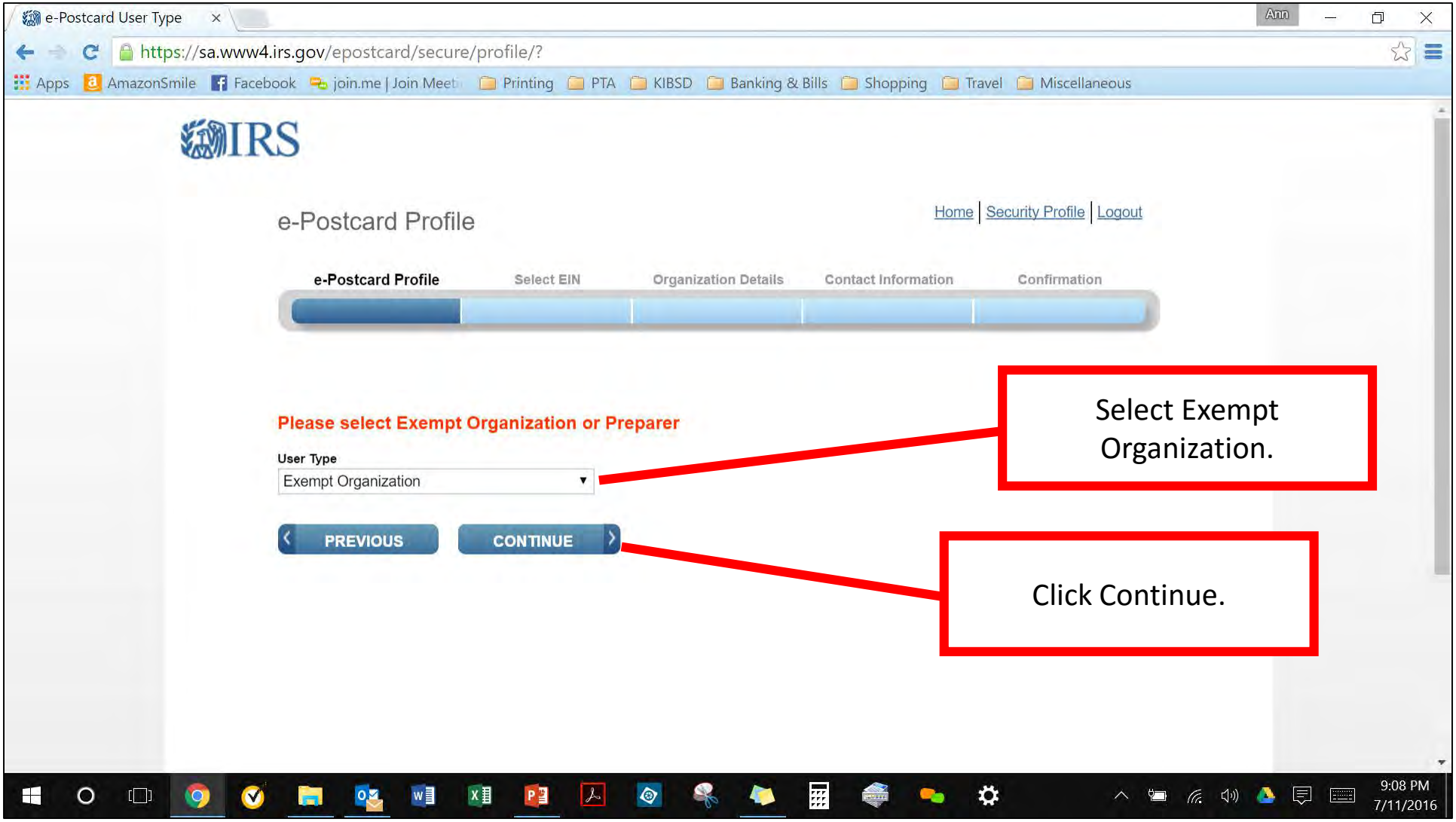
Application Version Number: 1.2.0

Version Build Date: 2016-06-06 14:13

9:07 PM
7/11/2016

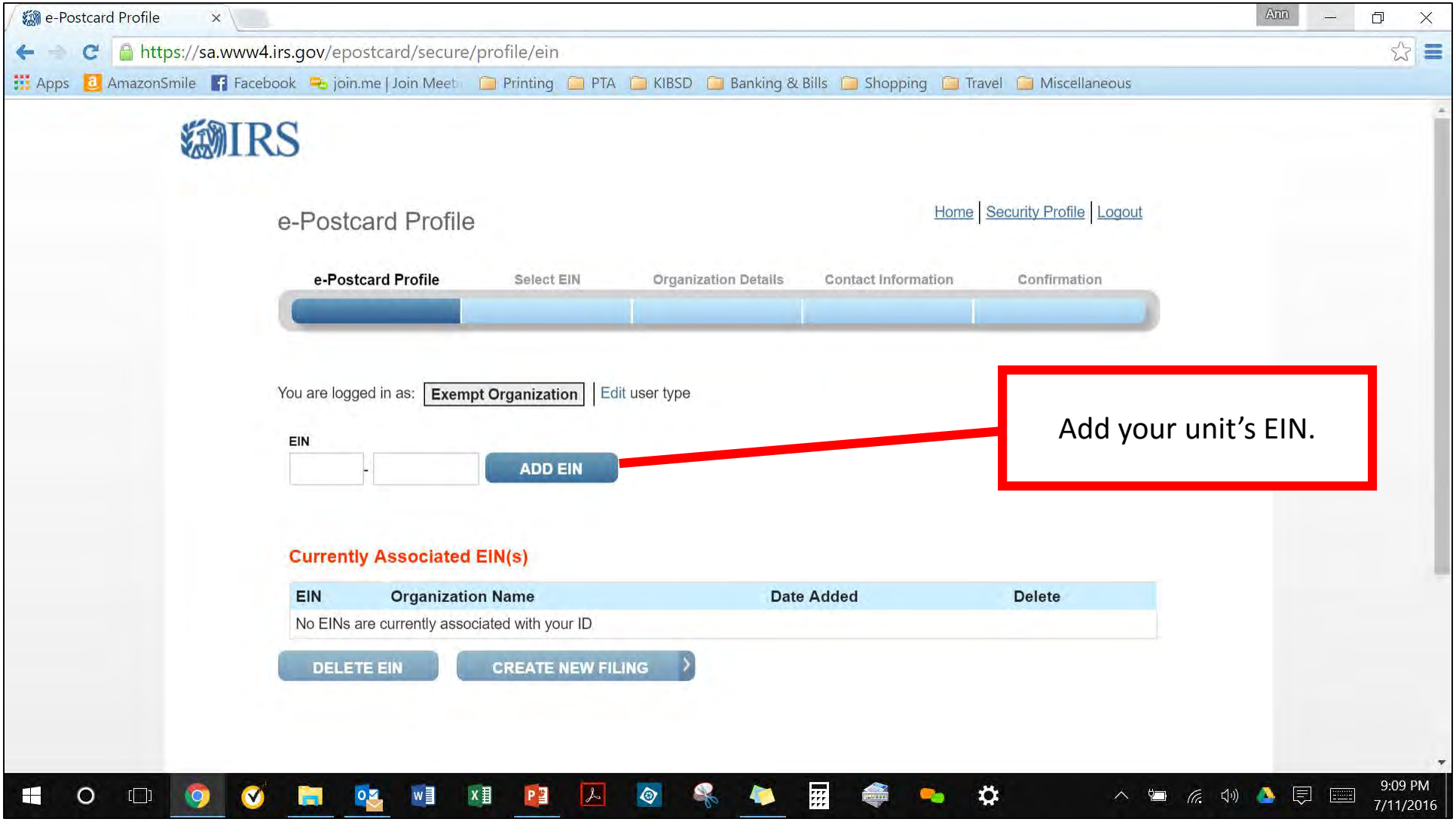
Step 12

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



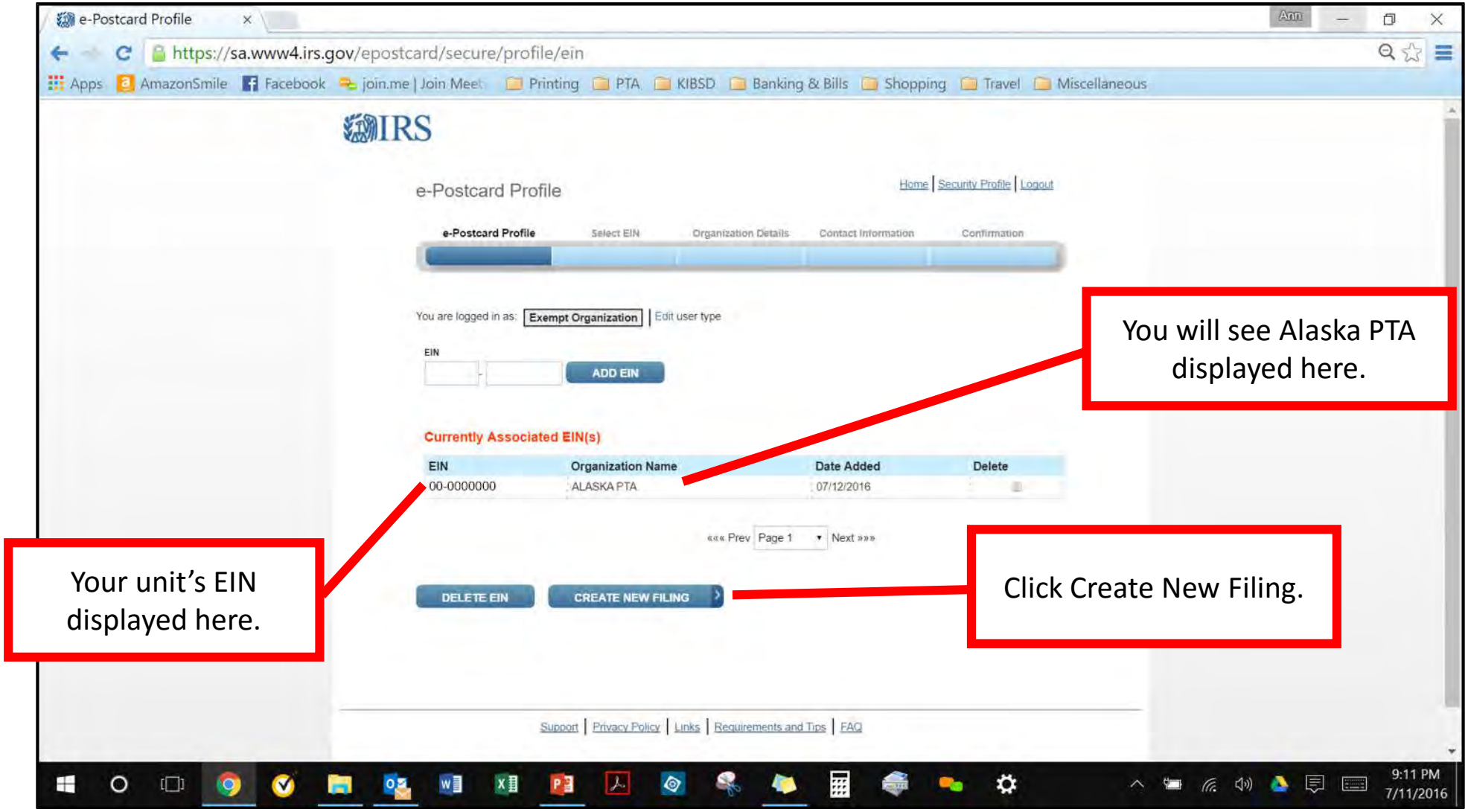
Step 13

- 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.**



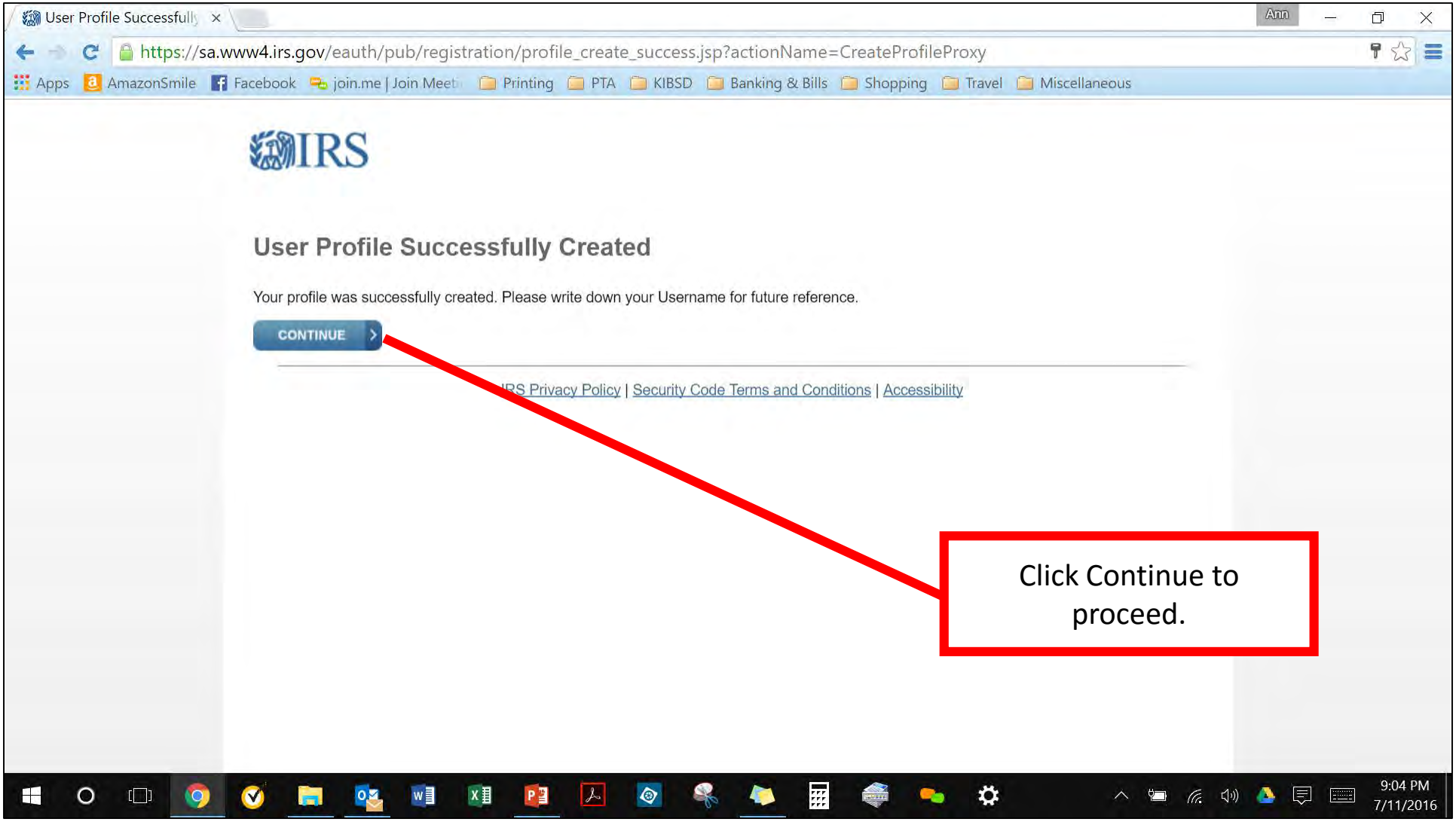
Step 14

- 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.



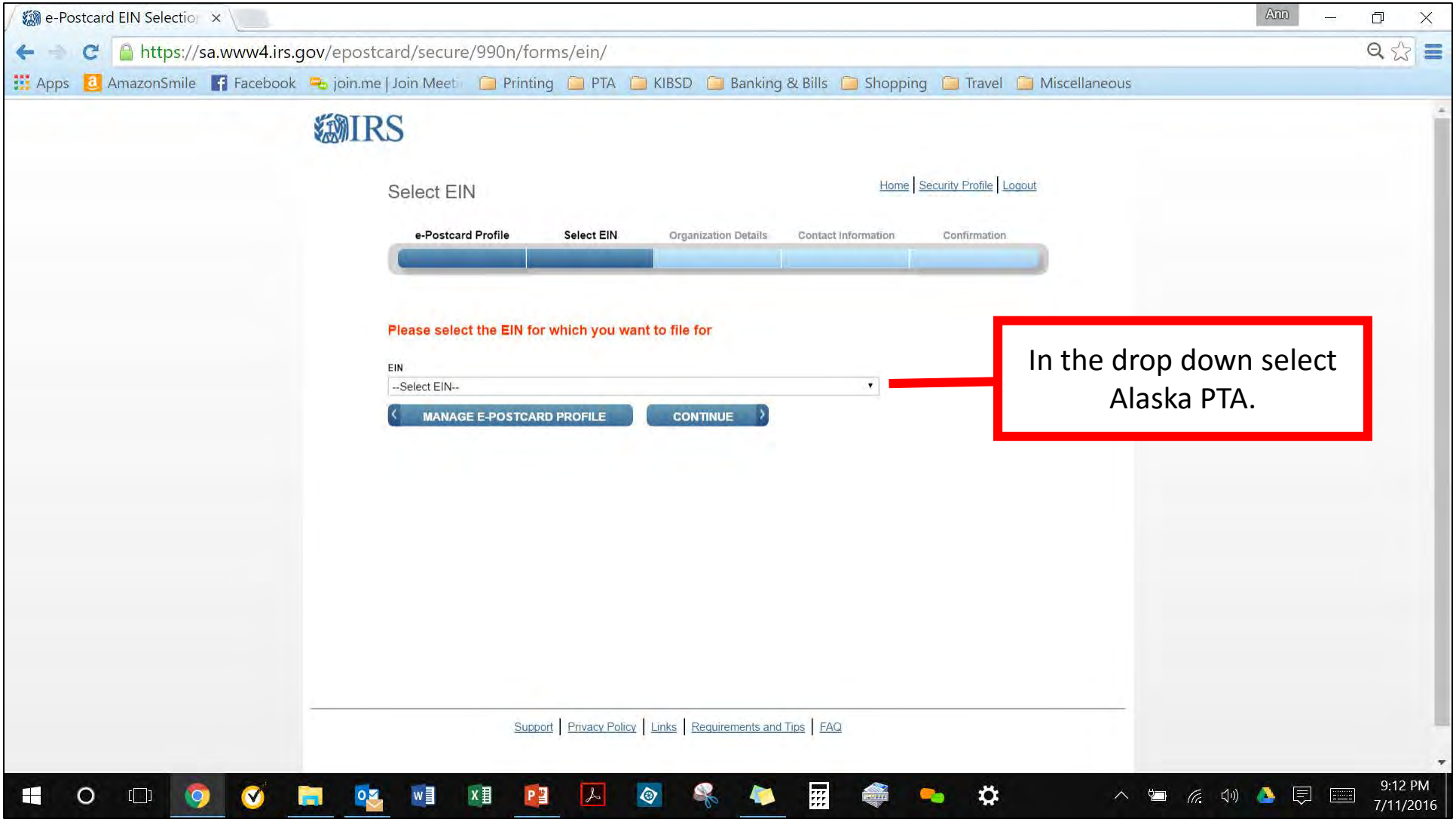
Step 15

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



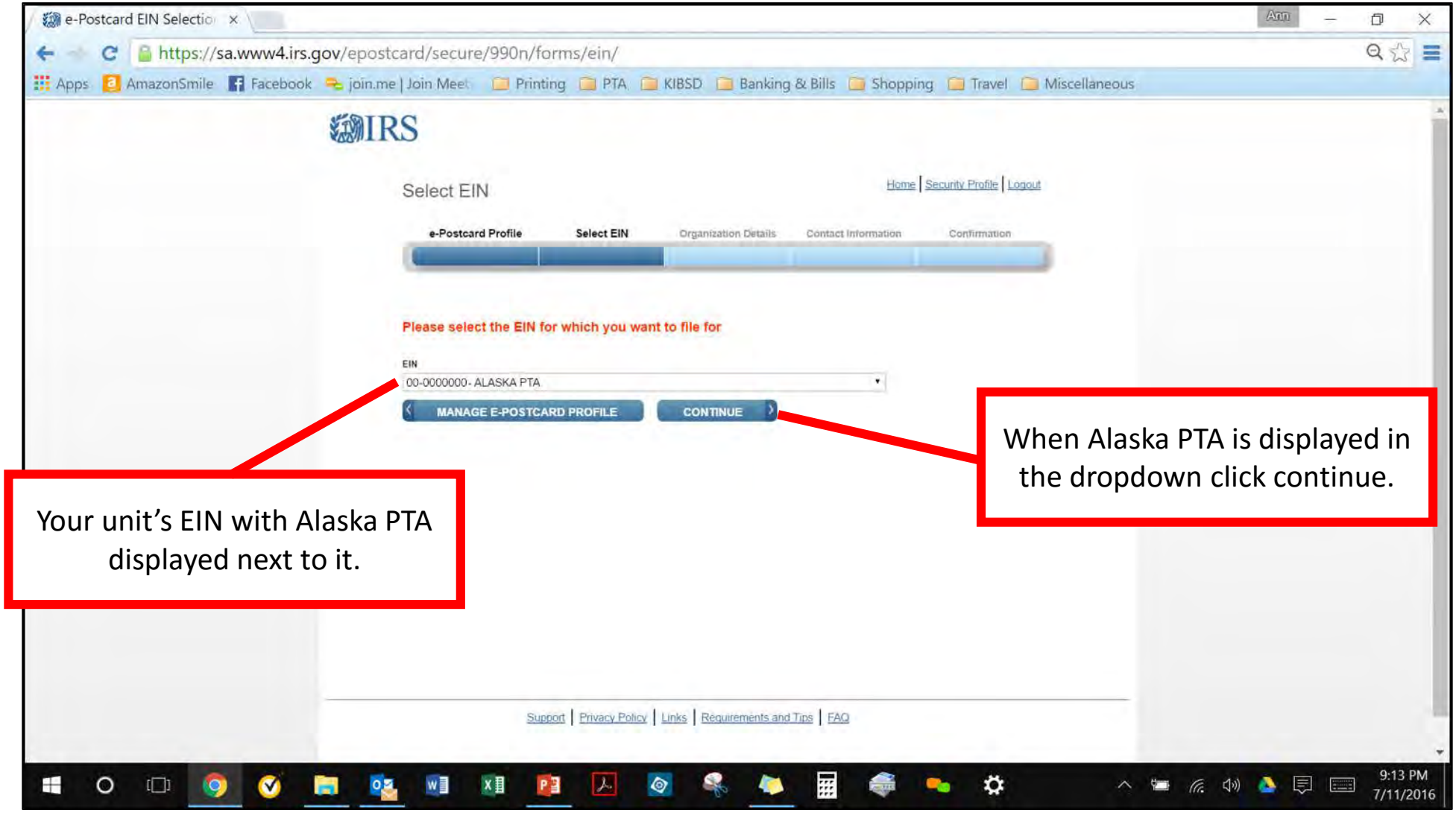
Step 16

- 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 it's own 501c3, you will select your unit name.



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.

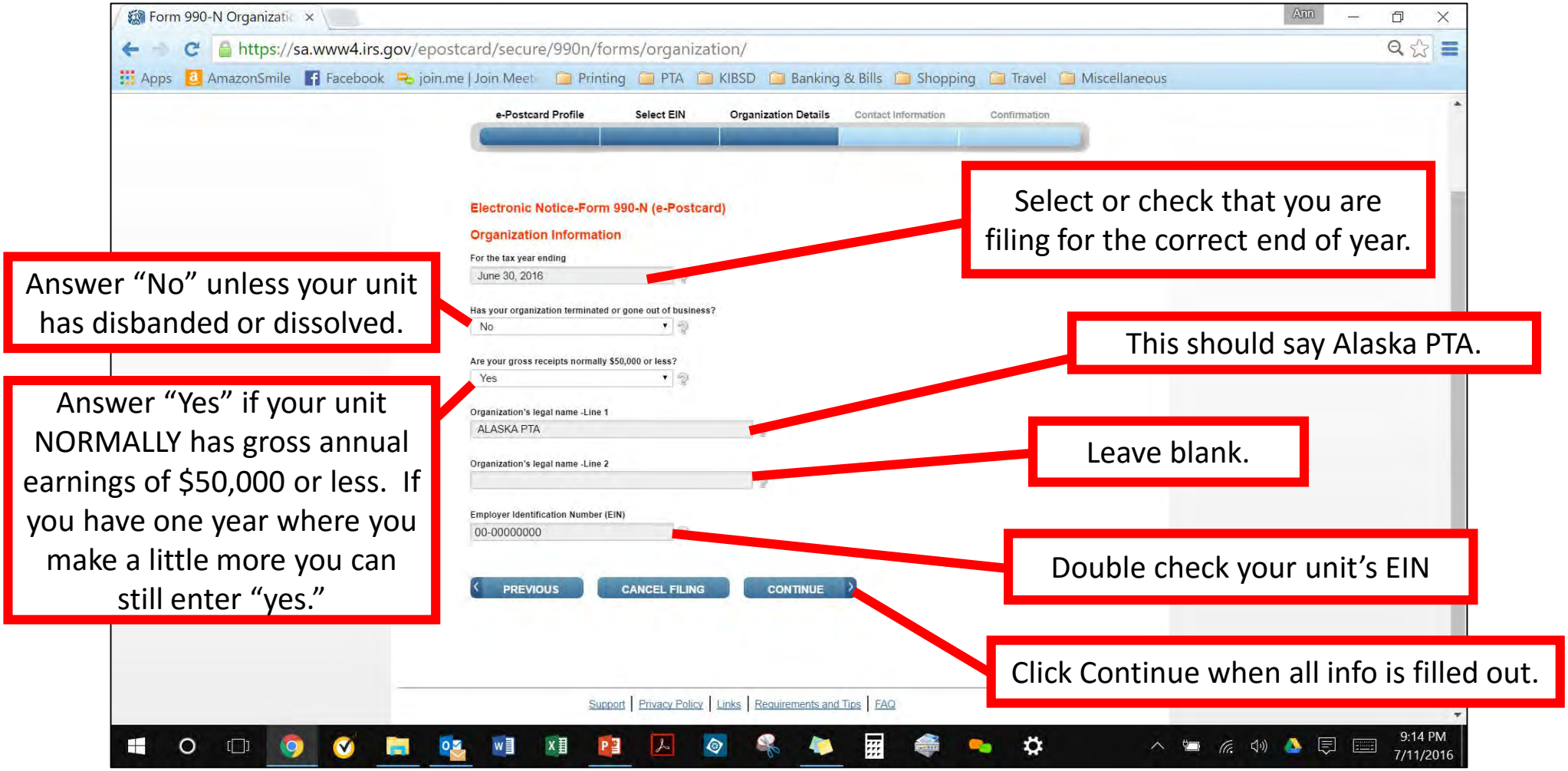


Your unit's EIN with Alaska PTA displayed next to it.

When Alaska PTA is displayed in the dropdown click continue.

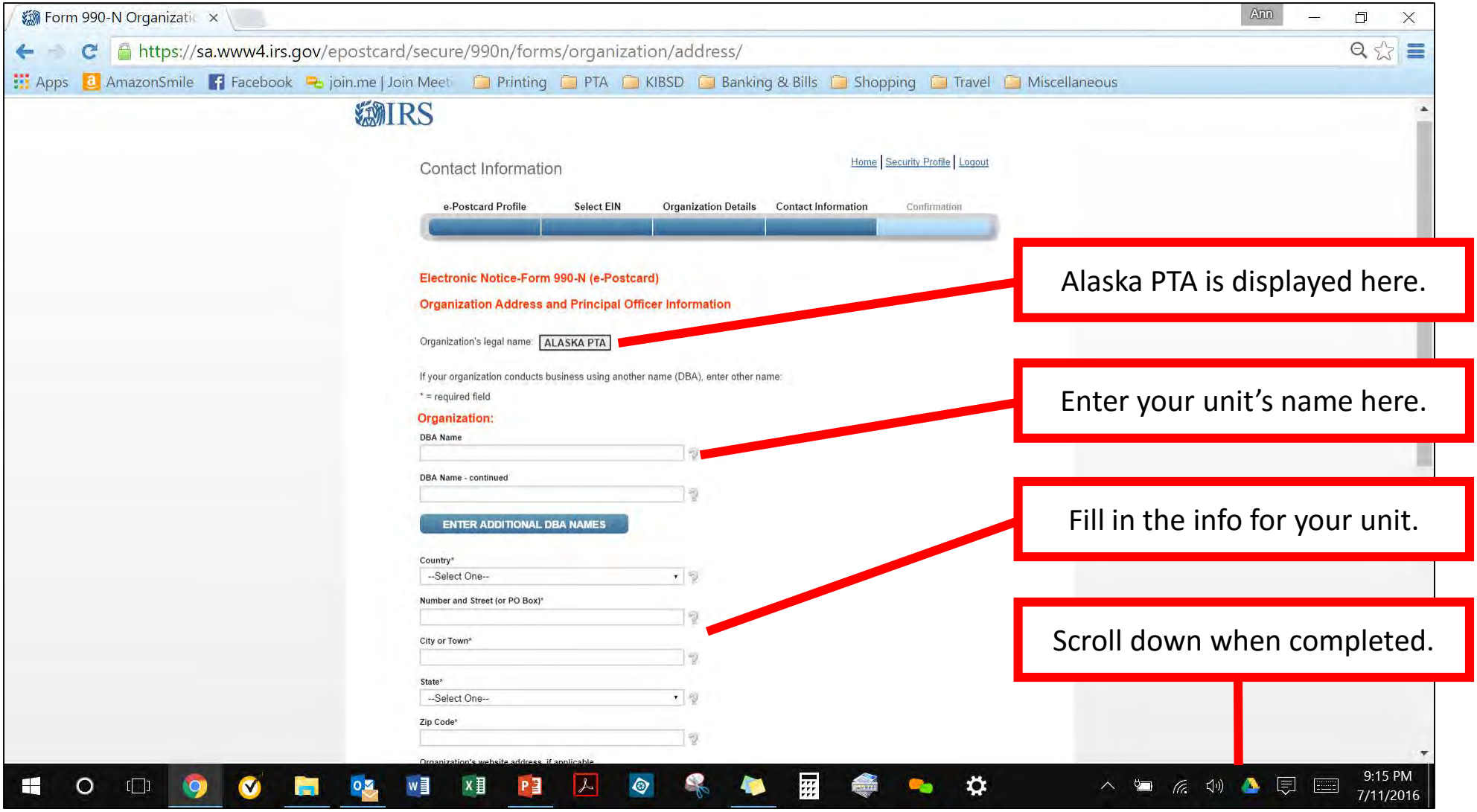
Step 18

- Check or enter in the correct end of tax year filing date. Most units have the year ending date of June 30th.
  - If you unit's is different, than 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.



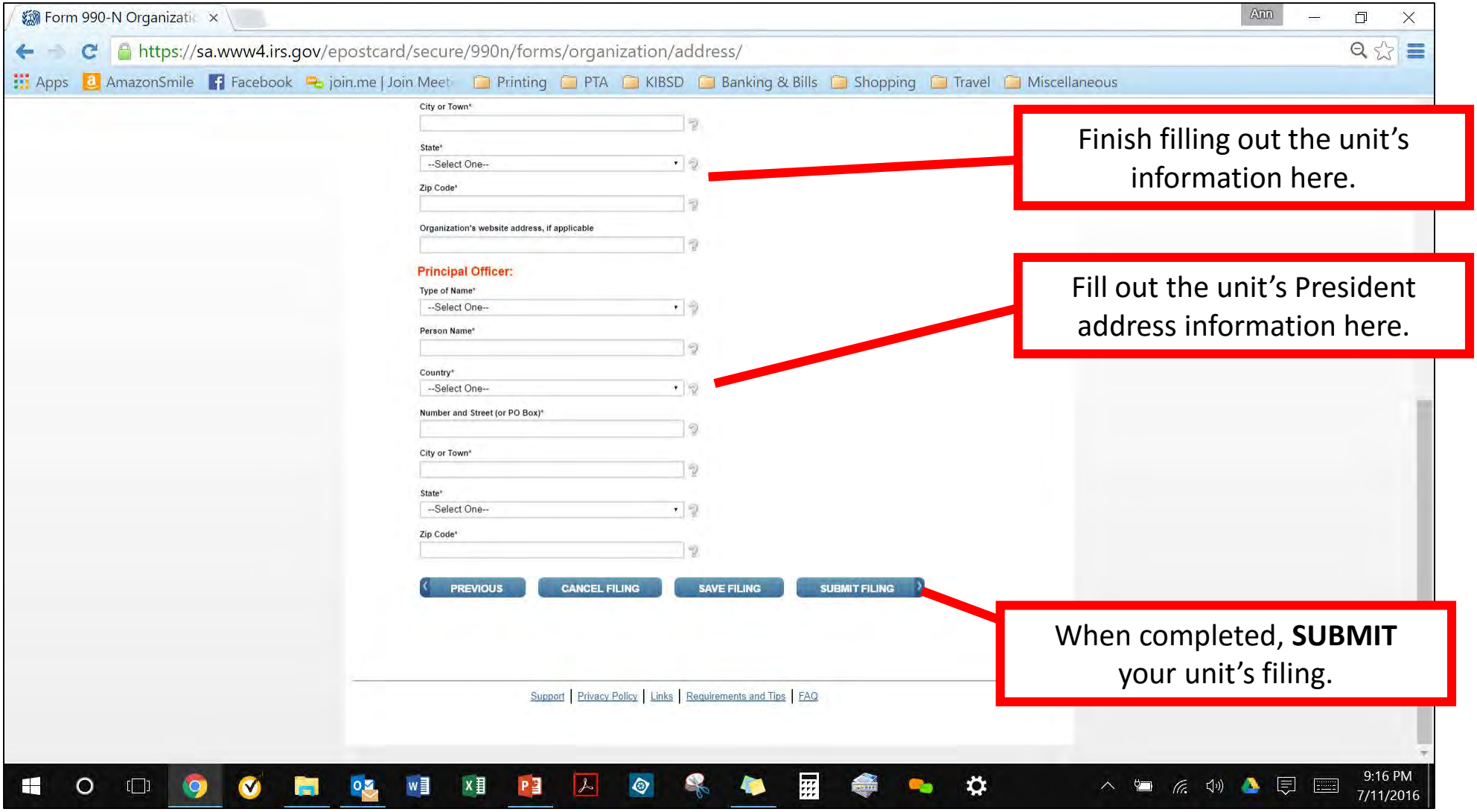
Step 19

- 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**<u>your unit</u>**.



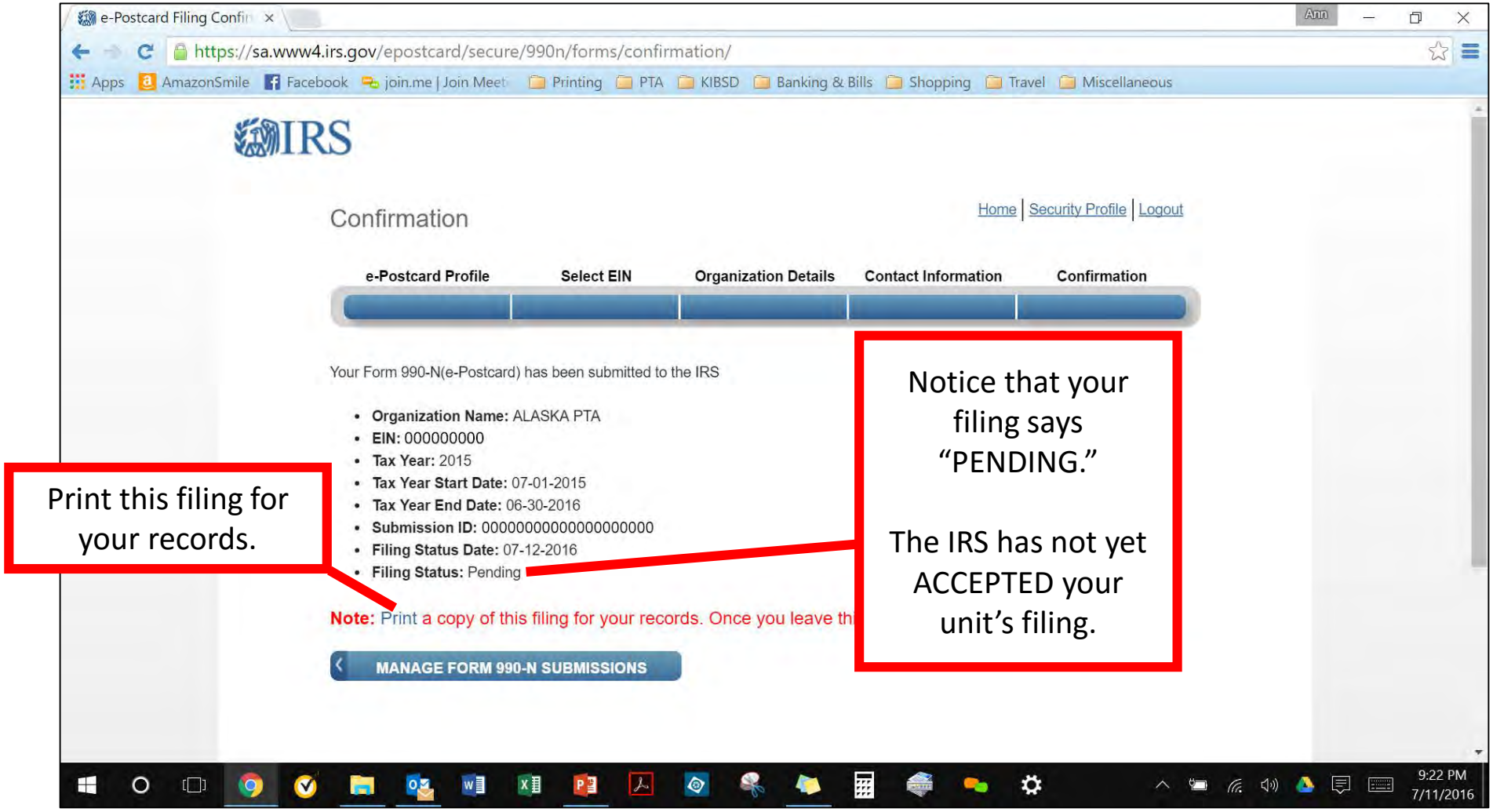
Step 20

- 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.*



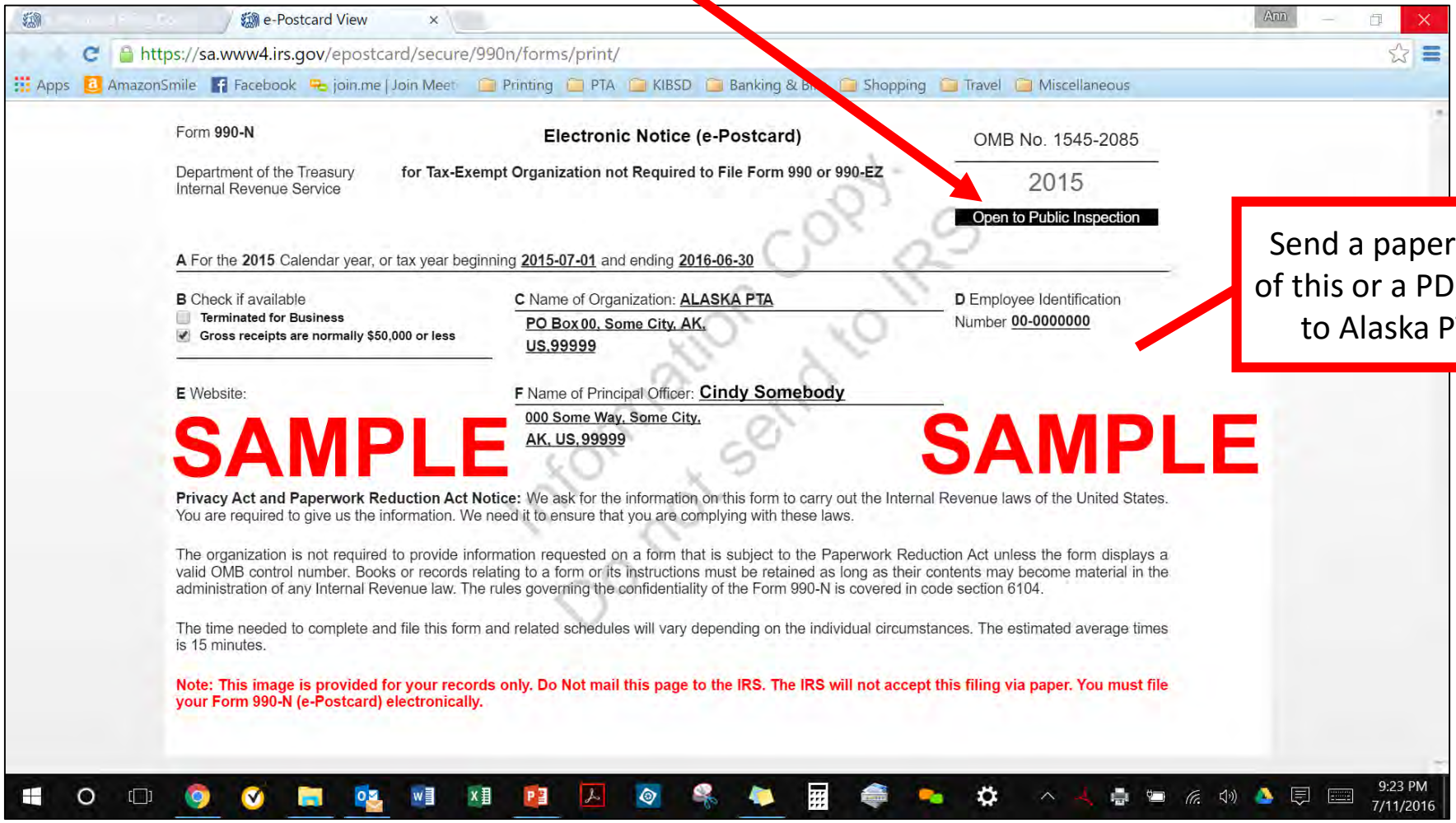
Step 21

- 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."***



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

- Wait 1-24 hours and then log back into https://www.irs.gov/charities-non-profits/annual-electronic-filing-requirement-for-small-exempt-organizations-form-990-n-e-postcard
- **You are going to login in as "RETURNING USER".**

Annual Electronic Filing

https://www.irs.gov/charities-non-profits/annual-electronic-filing-requirement-for-small-exempt-organizations-form-990-n-e-postcard

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- Future Webinars and Recorded Events
- Life Cycle
- Taxpayer Bill of Rights
- Tax Exempt and Government Entities
- **Charities & Non-Profits Home**

Annual Electronic Filing Requirement for Small Exempt Organizations — Form 990-N (e-Postcard)

How to file

To electronically submit Form 990-N, *Electronic Notice (e-Postcard) for Tax-Exempt Organizations Not Required to File Form 990 or Form 990EZ*, use the Form 990-N Electronic Filing System (e-Postcard).

- The Form 990-N electronic-filing system moved from Urban Institute's website to IRS.gov in February. **All filers** must register at IRS.gov prior to filing their next Form 990-N. This is a one-time registration; you won't be asked to register again when filing next year.
- Form 990-N must be completed and filed electronically. **There is no paper form**.
- Form 990-N filers may choose to file a complete Form 990 or Form 990-EZ instead.
- Use the Form 990-N Electronic Filing System (e-Postcard) User Guide while registering and filing.
- For filing system and website issues, see How to File: Frequently Asked Questions. If site issues are unresolved, call TE/GE Customer Accounts Services at 877-829-5500. A representative will file your Form 990-N information.
- Organizations should continue efforts to file, even if late.

Prior to filing your form, please review the following information:

Who must file

Most small tax-exempt organizations whose annual gross receipts are normally $50,000 or less can satisfy their annual reporting requirement by electronically submitting Form 990-N if they choose not to file Form 990 or Form 990-EZ instead.

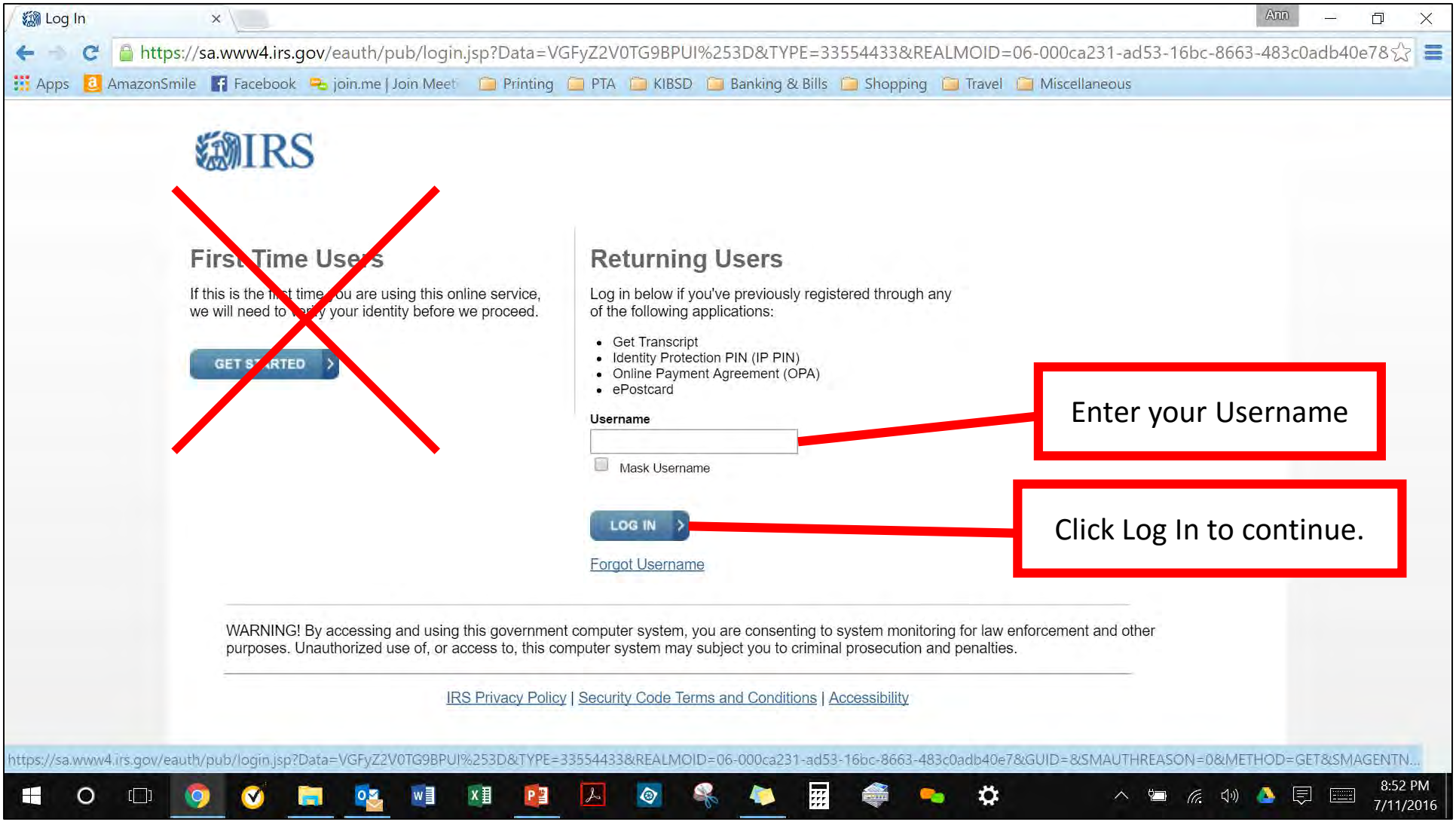
Exceptions to this requirement include:

Click this link to get back into the login screen.

8:49 PM
7/11/2016

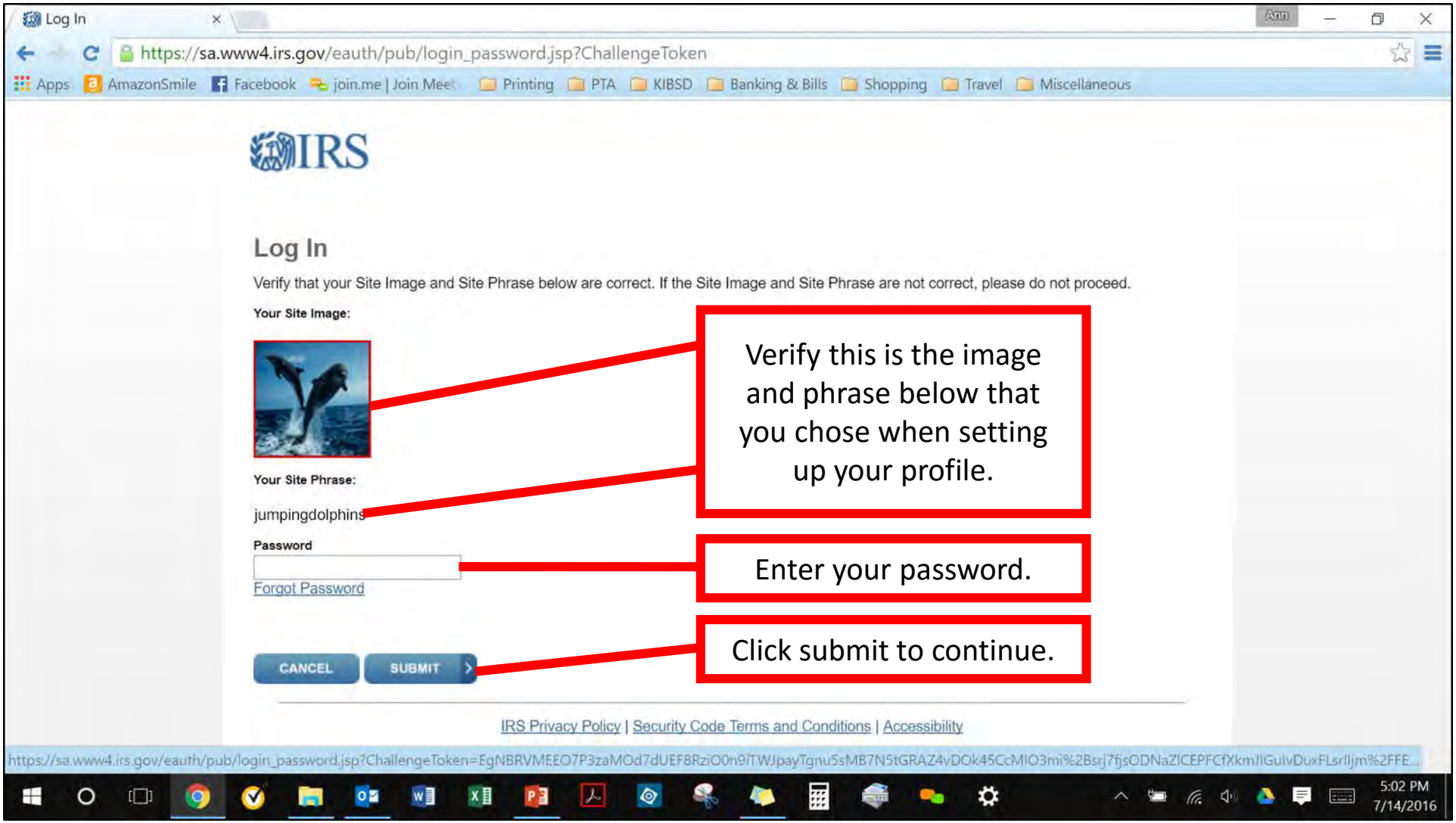
Step 24

- **<u>You will now login in as "RETURNING USER".</u>**
  - Enter your username and login that you made when you created the account and user profile.
  - Click Log In to continue.



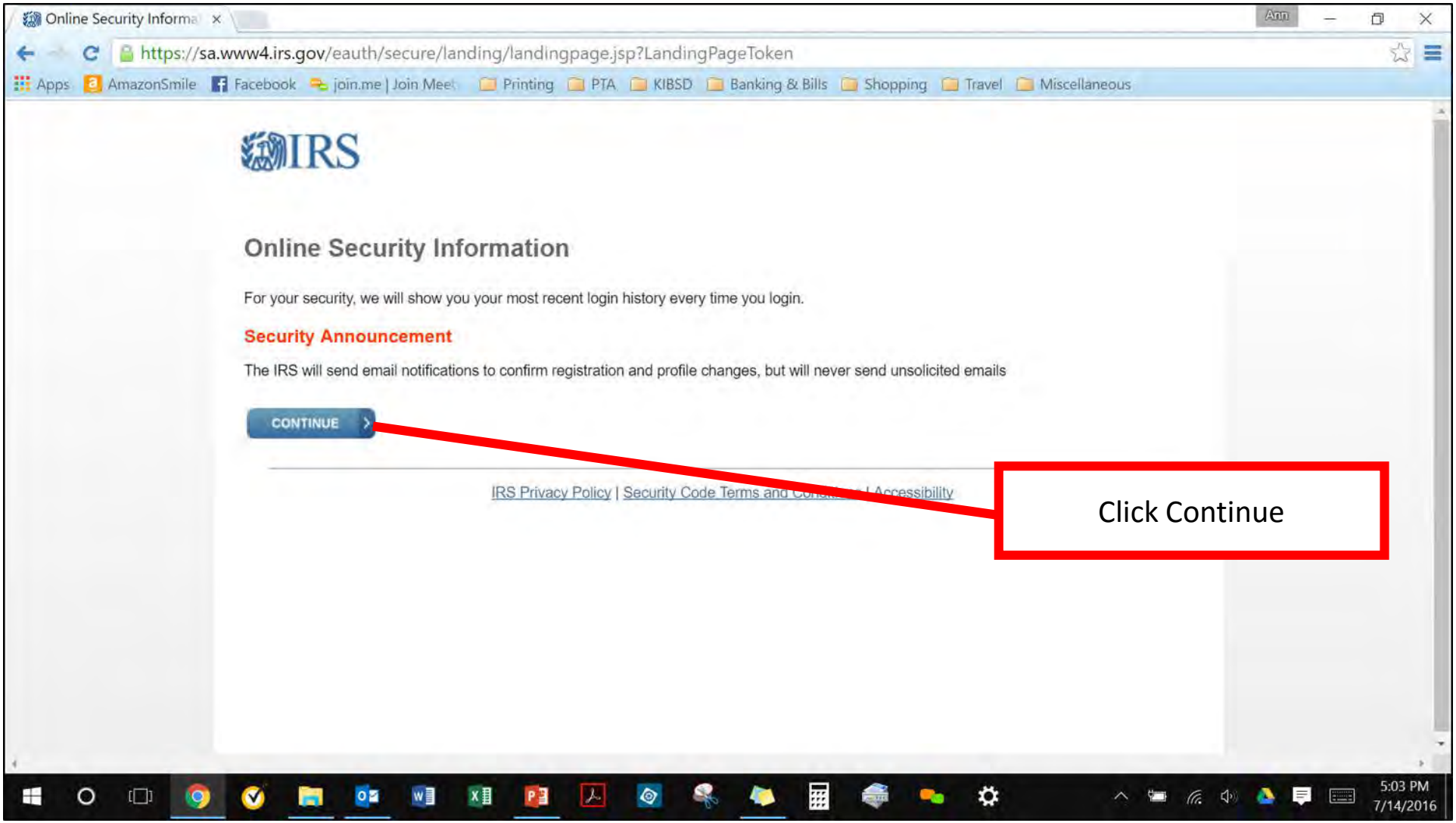
Step 25

- 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.



Step 26

- After you enter 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.

e-Postcard Home

https://sa.www4.irs.gov/epostcard/secure/home/

Apps | AmazonSmile | Facebook | join.me | Join Meet | Printing | PTA | KIBSD | Banking & Bills | Shopping | Travel | Miscellaneous

IRS

Electronically file your Form 990-N (e-Postcard)

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e-Postcard Profile

Before you can create a Form 990-N (e-Postcard), you must create your e-Postcard Profile. Your e-Postcard Profile allows you to:

1. Designate your e-Postcard Profile as either a "Preparer" or "Exempt Organization"
2. Add EINs to your e-Postcard Profile
3. Remove EINs from your e-Postcard Profile

More information on who must file a Form 990-N.

Once created, you can update your e-Postcard profile at any time. Click the button below to get started.

MANAGE E-POSTCARD PROFILE

Manage Form 990-N Submissions

Once your e-Postcard Profile is created, you can use the Manage Form 990-N Submissions page to:

1. Create a Form 990-N
2. View the status of your existing Form 990-N submission(s)
3. Edit an in-progress Form 990-N
4. Delete an in-progress Form 990-N

Click on the button below to get started.

MANAGE FORM 990-N SUBMISSIONS

Application Version Number: 1.2.0

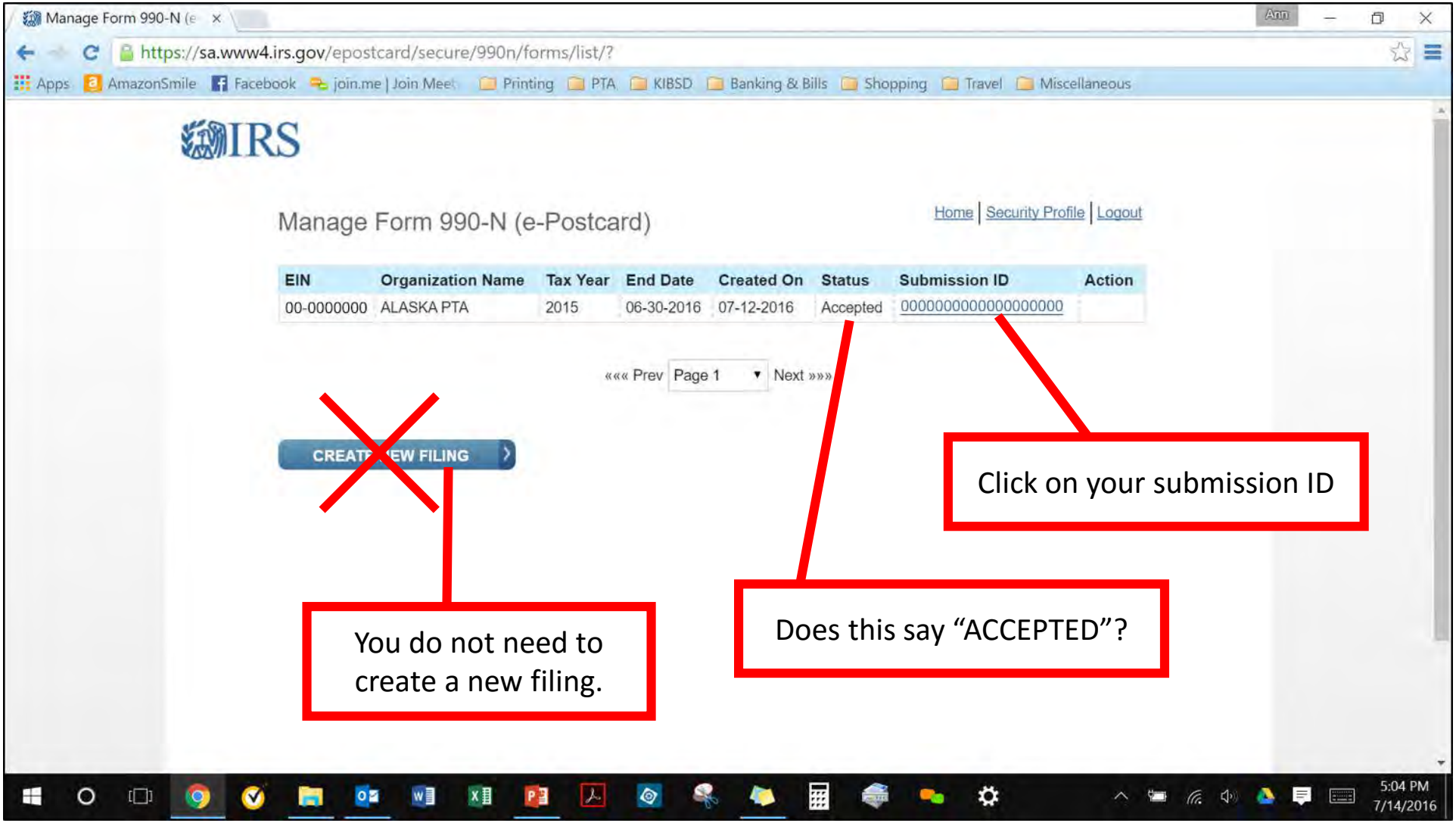
Version Build Date: 2016-06-06 14:13

Click Manage Form 990-N Submissions.

5:04 PM
7/14/2016

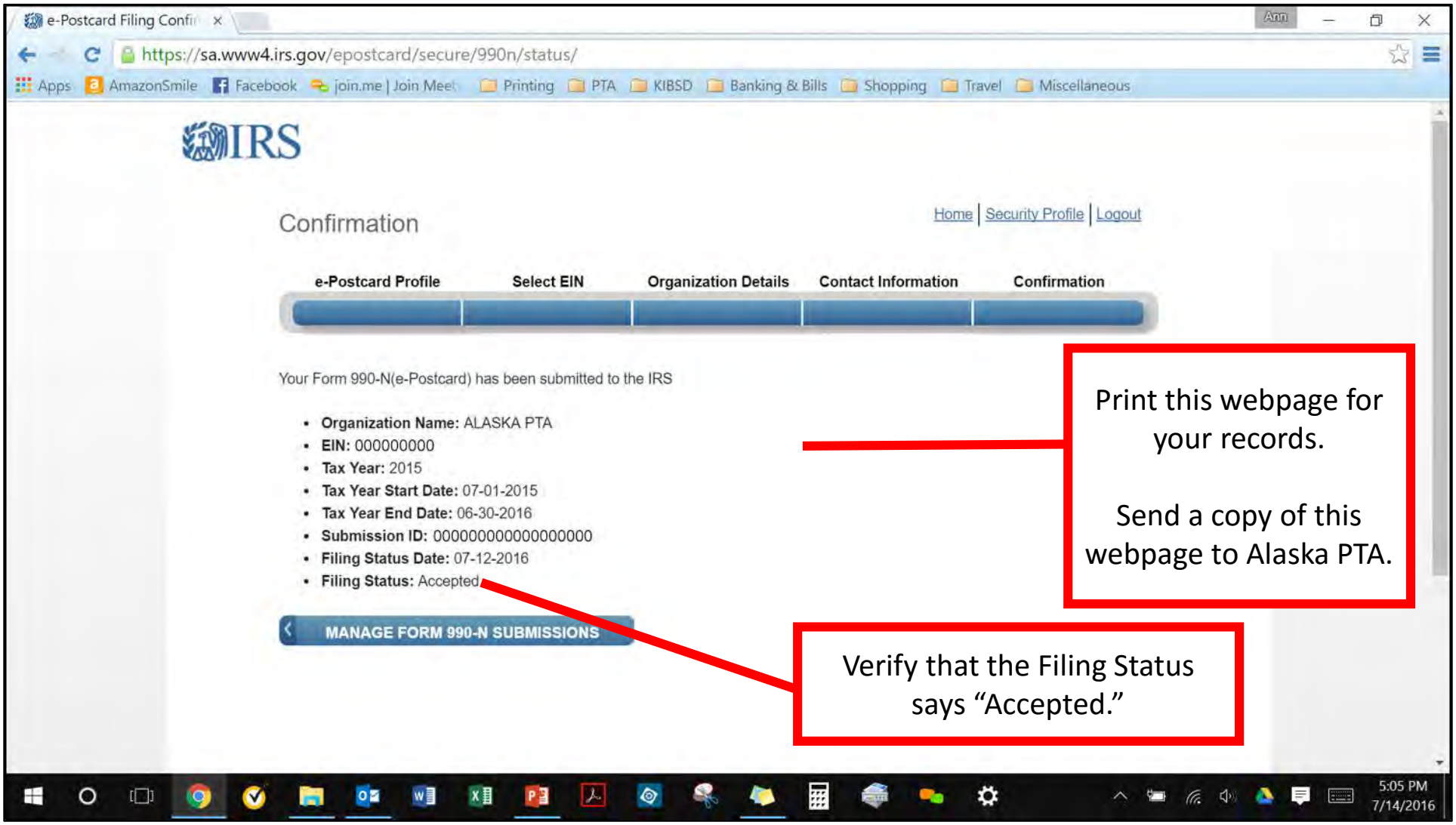
Step 28

- 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.



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.**



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
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