

IRS 990 Filing Instructions

- All PTAs in Utah are required to make an annual filing with the IRS. The determination of which form is required is based on the Gross Receipts Test.
- For the gross receipts test you will need the last 3 years of income for your PTA. Add the numbers together – get the total – and divide the total by 3.
- Less than the \$50,000 average you file the 990N. Over \$50,000 average you file the 990EZ.
- If you are filing a 990N, Utah PTA needs a copy of the confirmation email received. Please upload that to your Givebacks by August 1st.
- If you are filing a 990EZ, Utah PTA needs it to be sent to the Utah PTA office (DO NOT FILE DIRECTLY WITH THE IRS) by October 1st.
- **PLEASE REMEMBER TO FILE:
UTAH CONGRESS OF PARENTS AND TEACHERS
DBA YOUR SCHOOL NAME
USE THE UTAH PTA ADDRESS: 5192 GREENPINE DR SLC, UT 84123 in both places
where the address is entered.**

Important things to remember:

- Make sure you close multiple browsers.
- Do not use a smartphone to register or to file.
- Use only letter/numbers/hyphens.

Step by step instructions:

- Go to utahpta.org/irs-filings
- Click form 990N filing site
- Select ID.me create an account.
- Enter **personal email address.**
- Enter Password (lowercase letter, uppercase letter, number, at least 8 characters)
- Confirm Password
- Check “I accept the ID.me terms of service and privacy policy”
- Read the info on the next screen and accept to continue.
- Confirm your email address. Go to email and click the link. Once confirmed, close tab and return to previous tab.
- Secure your account. Choose the MFA (multi-factor authentication) option. (Choose text. Enter Your Phone #)
- Get the text with 6 digit code and enter into the box. Press continue.
- Authorize the Internal Revenue Service. (They will receive your email and first/last name.) Press Allow.
- It will automatically take you back to the IRS page.

- Click on Manage E postcard profile to create a new Form 990-N electronic filing submission.
- From the drop down menu select **Exempt organization** in the “user type” field. Select **CONTINUE**.
- Enter the **EIN** for the organization you’re filing for, then click **ADD EIN**. You may also delete EIN’s already associated with your profile. To continue, select **CREATE NEW FILING**.
- Select the EIN you wish to file for from the drop down menu. Once you have selected the EIN, select **CONTINUE**.
- Complete the “**Organization Details**” page.
 - Tax year ending **June 30, 2024**
 - Has your organization terminated or gone out of business? **NO**
 - Were your gross receipts less than \$50,000? **YES**
 - Line 1- PTA Utah Congress
 - Line 2- blank
 - Employer Identification Number (EIN) – double check for accuracy
 - When you have completed each line, select **CONTINUE**.
- Complete the “**Contact Information**” Page
 - Organization:
 - DBA name- YOUR PTA NAME
 - Country- US
 - Address:
5192 S Greenpine Dr (no periods)
Salt Lake City, UT 84123
 - Principal Officer – Enter President or Treasurer Name (Treasurer Name Preferred)
 - Address:
5192 S Greenpine Dr (no periods)
Salt Lake City, UT 84123
 - When you have completed each line, select **SUBMIT FILING**. Select when you are sure all required information has been input correctly.
- The filing **CONFIRMATION** will display the filing status as “**PENDING**”
- On the “Manage Form 990-N Submission” page, your submission will show the status of “**Pending**” **AFTER SEVEN MINUTES, refresh the page** (F5 key for windows, Command-R for mac) and the **GET UPDATED STATUS** button will be visible. The status will change from pending to ACCEPTED.
- Print a copy of this page for your records. Scan the copy (or save as a PDF) and upload it into Givebacks via compliance submission.