**INSTRUCTIONS FOR COMPLETING YOUR 990-N (e-Postcard)**

**To complete the e-postcard you will need the following information:**

* PTA EIN number (Employer Identification Number)
* PTA's legal name – Since your PTA is a subordinate member of Delaware Congress of
* Parents and Teachers, your IRS PTA name will start with those words.
* Proof that your gross receipts are $50,000.00 or less. (Treasurer's Year-End Financial
* Report)
* PTA mailing address. (If you are a unit, use the school’s address, if you are a council or
* a district-wide unit use the school district’s office address)
* One or more other names (DBA-doing business as) names used by your unit. Name(s)
* other than your legal IRS name listed on the Local Unit Information Sheet. Example:
* Delaware Congress of Parents and Teachers is the state PTA’s IRS legal name. The
* DBA names are Delaware PTA and DPTA
* PTA website address, if it has one.
* The president’s name and home address. (“Principal Officer” is requested, this is your
* current president.)
* PTA’s fiscal year. (Check your bylaws, if not certain.)

**Steps for filing an e-Postcard**

Go to <http://epostcard.form990.org> website and choose

**STEP 1: Register as a New User. This will give you a login ID.**

* Click Next (don’t use the browser’s “Back” or “Forward” buttons) and select exempt
* organization and enter PTA’s EIN (Employee Identification Number). The EIN was
* given to your PTA by the IRS when the unit was chartered.
* Click Next to create a password and fill in your personal contact information (so if they

have any questions they know who to contact).

* Once completed, you will receive an email containing an activation link.
* Close IRS site and open your email account. (Make sure your browser will allow mail

from epostcard@urban.org.)

* Open your email from epostcard@urban.org
* Click on the link in the email to activate and use your login ID. (Use your newly

established password to open this account.)

* Your login ID will appear with your password. (If you print this off please keep in a safe

place.)

**STEP 2: Create your Form 990-N (e-Postcard)**

* With the login ID and password, you can access the system and click Create your Form

990-N (e-Postcard) Now.

* On the next page fill in PTA fiscal year. (Beginning and ending dates)
* Answer NO to “Has your organization terminated or gone out of business?”

Fiscal Year-End Procedures

* Answer YES to “Are your gross receipts normally $50,000 or less?”
* Enter the EIN and the PTA’s legal name should appear (Missouri Congress…), verify that

it is correct.

* There are “?” by each question that you may click for help/instructions.
* The next page is Organization Address and Principal Officer Information
* DBA (means doing business as) name- If you unit goes by a name other than the IRS

legal name you need to enter that name(s) here.

* For units, the school address is the organization’s mailing address. For councils and

district-wide units, the school district office address is the organization’s mailing address.

* It asks for Principal Officer’s name and their home address. This is your current

president and their home address.

* If your PTA has a website, enter it.

**STEP 3: Summit your Form 990-N (e-Postcard)**

Click on the Submit Filing to IRS after checking to make sure everything is correct

It will take you to Congratulations, your Form 990-N (e-postcard) has been

submitted to the IRS.

 Once the IRS receives and processes your e-postcard (usually within 30 minutes), you

will receive an email indicating whether your e-postcard was accepted or rejected. If

accepted, you are done for the year. If rejected, the e-filing receipt email will contain

instructions on how to correct the problem.

At the bottom of this page you can either click log out or go to filing status page.

**PRINT THE EMAIL FROM THE IRS THAT STATES YOUR E-POSTCARD HAS BEEN ACCEPTED**. Keep a copy for your records for treasurer's book, president's book, secretary's book; forward the email to de\_office@pta.org or mail a copy to Delaware PTA by December 1st

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If you have any questions please contact: de\_office@pta.org