

Oregon PTA Bylaws require local PTAs to submit documents each year in order to be in compliance with the Oregon Department of Justice, Internal Revenue Service, and your liability insurance carrier. This is known as Unit in Good Standing (UGS).

This is a list of the required documents:

- Officers List – input your current Officer List online at the Oregon PTA website.
- Membership input online directly on the Oregon PTA website and dues paid – due monthly by the last day of each month. All officers and committee chairs are required to be members of their local unit by November of the year in which they serve. Initial membership for the year due by November 30th.
- 2020-2021 Year-End Financial Report
- 2020-2021 Financial Audit
- IRS 990/990EZ/990N – Due to IRS by the 15th of the 5th month after the last day of the fiscal year. (Nov. 15th.) A copy must be submitted to Oregon PTA by November 30th.
- Copy of CT-12 - Due to Oregon DOJ by November 15th; a copy sent to Oregon PTA by November 30th.
- Current Year's Standing Rules (approved by your general membership)
- Copy of your Annual Budget (approved by your general membership)
- Liability Insurance Payment – Paid directly to AIM
- Training Credits: Each unit needs a total of 3 credits for UGS. If you still need training credits, you can visit National PTA at pta.org and take the E-Learning courses from National PTA. Two workshops on the National PTA site count as one training credit for Oregon PTA.

You should be uploading items directly to your Oregon PTA dashboard by logging in using your National PTA ID # and your password. You can also mail documents to the Oregon PTA Office, you do not need to do both, just online or hard copy via mail.

If you are having trouble uploading anything to OregonPTA.org, or have other questions, please contact our office at office@oregonpta.org or call 503-234-3928.