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Checklist for Organizing a New Unit

Forms and instructions can be found at www.idahopta.org

	Complete “Application For Establishing A New Local PTA/PTSA Unit” form and send into the State office PO Box 50009 Boise, ID 83705
	Complete “PTA/PTSA Officer & Chairperson Information Form” and send to the State Office with membership dues for each board member
	Complete “Insurance Premium” form and send to AIM PO Box 674051 Dallas, TX 75267 with \$125.00 made out to AIM.
	Meet or communicate with Region Director. Schedule Officer Training
	TREASURER- File for an assumed business name “...PTA” at www.business.idaho.gov
	TREASURER- apply for sales tax number. This step automatically comes up at the end of registering your business. It will ask if you want to apply for a sales tax number. ALL PTA’S PAY SALES TAX!
	TREASURER- apply for your EIN number at www.irs.gov/business . Complete the SS-4 form (see instruction for completing the SS-4 in your Treasurer packet.) Please inform the State office of your EIN number when you receive it.
	TREASURER- Open a bank account. You will need your EIN number, Business License number and (sometimes) meeting notes. There should be three people from the board as signers.(usually the President, Vice-President and Treasure)
	Make PTA Membership Form (see example on idahopta.org) and have a membership drive. Send membership dues and membership list to State Office.
	Using template provided by Idaho PTA to write Local Unit Standing Rules and vote with general PTA members.
	Create a budget for the fiscal year. Vote with general membership
	Call your Region Director with any questions. We are here to help!
	Apply for Letter of Incorporation through the Secretary of State https://sosbiz.idaho.gov/auth?from=/forms/new/282