



Chapter Connection

Time to File your 990

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By now, your chapter treasurer and president should have received an e-mail from File990 that included a link to start your IRS 990 return. (If not, please contact Heather Lehman, ARMA International's manager of member services, at heather.lehman@armaintl.org). For those not familiar with File990.org, ARMA International began partnering with this service last year to help its chapters complete and file their annual 990 tax form. Those of us who had to complete this form in previous years probably well remember the time-sucking, hair-pulling, numbers-not-adding, experience! For most chapters, what before was an intense number-crunching session is now a fairly simple process to complete.

With File990, chapters whose gross receipts for the year were less than \$50,000 can complete the form in just a few short steps. The process for those with receipts greater than that will require a bit more information (similar to what was required under the previous 990 forms). If your chapter falls into the latter category, File990 can import your financial data from either QuickBooks or a bank statement. (See the support options through File990.org for more information.)

Here are the basics for completing your File990:

- Click on the link in the e-mail from File990 (or browse to www.file990.org).
- Click the option to create a new 990 file, select the category box that represents your chapter's gross receipts for the past year, enter your chapter name and the tax year you are filing, and click "Create."
- Begin by entering your chapter's employer identification number (EIN), which will auto-complete portions of the form. (The EIN must match what ARMA headquarters has on file for your chapter, or your return will be rejected.) If the form autocompletes mailing information for ARMA International, don't worry about changing it.
- Verify that the "Legal Name" field contains your chapter's name. If your legal chapter name contains the symbol "&," change it to the word "and" to prevent an error later in the process.
- Enter the beginning tax period (07/01/2015) and the ending tax period (06/30/2016), then click "Continue."
- If your chapter's receipts were **under** the \$50,000 threshold, you are done with your form and can select the "Submit & Print" option. Here you will be able to download a PDF of the return; please review it before continuing.
- If your chapter's receipts were **over** the \$50,000 threshold, there will be additional fields to complete regarding the amounts and types of revenues/expenses incurred



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for the year. If you have been working from an official budget or have up-to-date information, you should be able to complete this section fairly quickly.

- With the filing verified, click the “Submit” option, where you will enter the contact information of the person submitting the form. When done, click on “Submit” and wait for the confirmation that your return has been filed.
- After your return has been accepted, you can log back on to download and print a copy of the filing.

The best part of all this is that you have until November 15 to file your chapter’s return. That is nearly 4½ months to answer a few questions and hit submit! But double-check now to ensure that your current chapter treasurer and president have received the e-mail from File990. (If they haven’t, the e-mail might have gone to your past treasurer and/or president, and the reminders that are usually sent on the first of every month until your filing is completed will go to them as well.) Chapters that haven’t received the e-mail should contact ARMA headquarter’s member services at heather.lehman@armaintl.org.

Happy tax filing!