



REGION BYLAWS CHAIR

BYLAWS WIZARD REVIEW PROCESS

BYLAWS WIZARD REVIEW: On the NYS Portal – nyspta.force.com/login -go to Bylaws Tab

- You will receive an email notice that a unit has submitted their new or amended bylaws, directing you to the portal.
- It should take you directly to the bylaws summary page for that unit. You may also locate by opening the unit's home page and scrolling down to the most recently submitted bylaws or find them in the *Bylaws Awaiting Region Approval* queue.
- Click the “edit” button and take a look at the information as it is listed. Make a note in the “issues to resolve” section if there is anything missing – such as the **adoption date**, or if anything else stands out at you, i.e. nominating committee of 25 members. Check the number of council delegates v. your council(s) bylaws in your region (units may choose to have FEWER than the number of council delegates allowed according to the council bylaws, but they may not have MORE).
- Once you have finished looking over the summary and making any edits click “save.”
- Contact the president and ask them to send you the signed cover page via email or mail.
- Once you have received the cover page, go back into the bylaws record and record the date it was received. Also if there is no adoption date, enter that date and any other changes you need to make. The units have been asked NOT to go back and complete second bylaws if they make a mistake, but to contact the Region Bylaws Chairperson for assistance.
- You are the only one with this signed cover sheet, so you **MUST** file this with the unit's bylaws in your region folder in the event it is needed for verification at some point (the way regions are “saving” their bylaws is an individual choice-hard copies, flash drive, etc.).
- Once you have made sure that everything in the record looks right, then scroll down and click ‘**approve.**’ The record will then go into the *Bylaws Awaiting State Approval* queue for approval by the NYS Bylaws Coordinator. The person who created the bylaws will receive an email with a copy of their proposed bylaws.
- You have the option to “Reject” bylaws if they are test copies, duplicates or ones that should not be submitted.

- The NYS PTA Bylaws Coordinator will approve the bylaws by entering the date of approval, the date of expiration and electronic signature. The person who created the bylaws will receive an email with the newly “state approved” copy. Bylaws expiration dates are one of four times per year – January, April, July and October.
- You may access the State Approval queue in order to see if your bylaws have been approved by the state coordinator.
- You should regularly check the Region Approval queue for bylaws that have been in the queue for more than 6 months, so that you can follow up with the units.
- You should be sending out reminder letters or emails to the units at least 6 months in advance of the expiration date of their current bylaws. Direct them to the NYS PTA website for all of the information that they will need to get them started. They can also access the Bylaws Wizard from Memberhub.
- **Amendments** – If a unit is proposing amended bylaws, they must not be expiring within 90 days and only THREE amendments are permitted per approved bylaws. You **MUST** compare the current bylaws with those amended bylaws. The unit must send the completed and signed amendment page **AND** the signed cover page before you can approve them.
- There is a special process to follow if a unit has a name change. This is due to the IRS and NYS Tax regulations and is handled by our state financial specialist. A copy of the process for this is available on the IDL.
- *Please check with your Region Director regarding the expiration of your Region’s bylaws. These must be approved at your Region’s annual meeting. Be sure to get them ready for approval if they are due to expire!*

ONCE APPROVED BY NYS PTA BYLAWS COORDINATOR:

- Check back to the State approval queue to see if the bylaws you approved have been approved by the NYS Bylaws Coordinator.
 - You may be asked to send a copy of the bylaws to a unit, due to a missing email, or changeover in leadership. The units **DO NOT** have access to these on Memberhub (only their expiration date is available), as they did on the portal.
 - You should print the Cover Sheet of the approved bylaws and file with the signed Cover Sheet (and amendment page if applicable) you already have so you know that the bylaws have been approved.
- **THAT’S IT ~ YOU ARE FINISHED!**

