



Calendar Year: _____

**PRIVATE ORGANIZATION (PO) - REPORT LOG
CALENDAR YEAR – PER QUARTER**

1. PO Information & Dates.

- a. PO Name _____
- b. POC Name: _____
- c. Approval Date: _____
- d. Expiration Date: _____
- e. Revalidation Request Letter/Memo 150 days: Due Date _____ Received _____
- f. Revalidation Packet Due Date 90 days: Due Date _____ Received _____

2. State, Local, & Federal Requirements (if not applicable/ must provide exemption).

- a. State- General Excise Tax (GETax): _____
- b. State- Business Registration (BREG): _____
- c. State- Charity Registration: _____
- d. Federal Determination Letter: EIN Code _____ Dated _____
- e. Federal Tax Filing Form 990: Year: _____
- f. Insurance Liability/Bond: Expiration Date _____ Policy# _____ Name _____
- g. MOU/MOA: Lease # _____ Expiration Date _____

3. Quarterly (Q) Reports for Meeting minutes (MM), Financials, Audits, and any updated operating documents.

- a. Q1 - (Jan, Feb, Mar) - Due April: Reminder _____ Received _____
- b. Q2 - (Apr, May, Jun) - Due July: Reminder _____ Received _____
- c. Q3 - (Jul, Aug, Sep) - Due October: Reminder _____ Received _____
- d. Q4 - (Oct, Nov, Dec) - Due January: Reminder _____ Received _____



4. First Calendar Year (CY) Log for Digital Copy (DC) and Hard Copy (HC).

CY 20__	MM		Financials		Operating Files (Updated)		Expire Documents		Any Other Documents	
Quarter	DC	HC	DC	HC	DC	HC	DC	HC	DC	HC
Q1- APR										
Q2- JUL										
Q3- OCT										
Q4- JAN										

5. CY 20__ Signature and Remarks.

<p>Q1. _____</p> <p>_____</p> <p>POC Name: _____ Sign _____ Date _____</p>
<p>Q2. _____</p> <p>_____</p> <p>POC Name: _____ Sign _____ Date _____</p>
<p>Q3. _____</p> <p>_____</p> <p>POC Name: _____ Sign _____ Date _____</p>
<p>Q4. _____</p> <p>_____</p> <p>POC Name: _____ Sign _____ Date _____</p>



6. Second Calendar Year (CY) Log for Digital Copy (DC) and Hard Copy (HC).

CY 20__	MM		Financials		Operating Files (Updated)		Expire Documents		Any Other Documents	
Quarter	DC	HC	DC	HC	DC	HC	DC	HC	DC	HC
Q1- APR										
Q2- JUL										
Q3- OCT										
Q4- JAN										

7. CY 20__ Signature and Remarks.

<p>Q1. _____</p> <p>_____</p> <p>POC Name: _____ Sign _____ Date _____</p>
<p>Q2. _____</p> <p>_____</p> <p>POC Name: _____ Sign _____ Date _____</p>
<p>Q3. _____</p> <p>_____</p> <p>POC Name: _____ Sign _____ Date _____</p>
<p>Q4. _____</p> <p>_____</p> <p>POC Name: _____ Sign _____ Date _____</p>