

OEA MEMBERSHIP DEPARTMENT

2018-2019

Monthly Membership Guide & Updates For Local Association Leaders

February 28, 2019

Monthly Reminders:

- 40% of Dues Obligation required by 3/15/2019
- 3/27/18—Dues payment to OEA. (Remember to include your local's 4-digit ID number on your check payments.)

- Enclosed is the February 2019 billing statement for the 2018-2019 Membership Year.
- **As A Reminder:** NEA Bylaw 2-9 requires each local association to have transmitted at least forty percent (40%) of its dues to the OEA by March 15 and seventy percent (70%) by June 1, unless the contracted transmittal schedule stipulates otherwise.
- If you have not yet reviewed your Local Association's 2018-2019 membership roster sent out with December's billing statement, please do so and return any changes on a pink 2018-2019 "Membership Update Form". Another 2018-2019 membership roster will be mailed to you in April. This will be the last chance to check your membership before materials are printed for the new 2019-2020 Membership year.
- Thanks to all the locals that returned their non-deliverable address report and 2018-2019 Membership Update Forms. All changes received before February 28th have been completed. Changes received after February 28th will be on next month's billing statement.
- **2019-2020 Membership Enrollment Materials** will be mailed to the home address of the treasurer on record once the details have been finalized. We anticipate the Membership Enrollment Materials to mail to the home address of the Treasurer on record in June this year. You may want to share this information with the other officers in your local. It is important to have the correct Treasurer, and other officers on record. Please report any new election results to your OEA field office with name, address, non-work phone number and a non-work e-mail address as soon as possible.
- **Important:** The Tax Cuts and Job Act effective tax year 2018 suspended the previous deduction for job-related expenses or other miscellaneous itemized deductions that exceeded 2 percent of adjusted gross income. This suspension includes unreimbursed employee expenses such as union dues. These expenses are no longer deductible. Therefore, the annual "Deductible/Non-Deductible portion of dues" publication will not be produced. For further information please see your tax preparer or IRS publication 5307.



Thanks for your continued efforts and support.

If you have questions or concerns please contact us by e-mail:
membership@ohea.org

Or by telephone: InfOEA
1-844-632-4636

*All enclosures are sent to the local treasurer. This mailing to other officers is for informational purposes only.

Frequently Asked Questions:

Q. How would I sign-up an individual as a member who was hired mid-year?

A. First you would check the individual's eligibility. Was the eligibility date the beginning of the membership year? If so, full dues would be required. If not and the individual is a new employee, go to the pro-rate tables located in the yellow section of the 2018-2019 Treasurer's Handbook. Look for the membership type of the individual then move across the page to the OEA District Column. Go down the column to the month of eligibility for the individual and find the amount of the dues (which are the UEP dues excluding the local dues). Make sure to add the local association dues to the UEP dues for this individual's membership type. Write this amount on the enrollment form in the box marked Annual Dues on the form. Beside the amount please indicate the "Unified Code" (example: "AC-1-100" Full Time Educator or "AC-2-100" Full Time Education Support Professional) for the individual. Have the individual complete and sign the rest of the form. Forward all copies to the appropriate place/person.

Q. Where do I find a copy of the Annual "Deductible/Non-Deductible portion of dues" Document?

A. The Tax Cuts and Job Act effective tax year 2018 suspended the previous deduction for job-related expenses or other miscellaneous itemized deductions that exceeded 2 percent of adjusted gross income. This suspension includes unreimbursed employee expenses such as union dues. These expenses are no longer deductible. Therefore, the annual "Deductible/Non-Deductible portion of dues" publication will not be produced. For further information please see your tax preparer or IRS publication 5307.

Miscellaneous:

990 ANNUAL IRS FILING

The annual IRS 990 filing for fiscal year ending 8/31/2018 (Tax year 2018), was to be completed by January 15th, 2019. Local associations that have not filed a 990 are required to contact the IRS immediately at 877-829-5500.

2019 District Treasurer's Workshops

Dates and times are currently being scheduled. The following OEA District Treasurer's Workshops have been scheduled and are open to other Leaders in your Local:

CENTRAL on June 10, 2019: WEOA on July 10, 2019: ECOEA on July 15, 2019: SEOEA on July 18, 2019: NWEOA on July 23, 2019: NEOEA on July 24, 2019: SWOEA on July 30, 2019: EOEA on August 5, 2019: NCOEA on August 6, 2019.

For your convenience, you can also attend another districts workshop by contacting them to reserve your seat if that date works better with your schedule. We will keep you informed as new workshops are scheduled.