

# OEA MEMBERSHIP DEPARTMENT

## 2019-2020

### Monthly Membership Guide & Updates For Local Association Leaders

June 30, 2020

#### July Reminders:

- **27th—Dues payment to OEA.** (Remember to include your local's 4-digit ID number on your check payments.)
- Update and return the Dues Transmittal Agreement.
- Office closed July 3rd

Reference documents available to you on the OEA Website under Resources/ OEA Secretary/Treasurer page:

- ⇒ 20-21 Local Treasurer's Handbook
- ⇒ Monthly Treasurer's Memos (past 12 months)
- ⇒ 20-21 Dues Rates and Pro-Rate Dues Tables
- ⇒ Forms for reconciliation
- ⇒ Membership Update form

#### **OEA Office Summer Hours:**

(From 6/1/2020 - 8/31/2020)

**8:15 AM – 4:30 PM**

Contact Center InfoOEA remains  
**8:30 AM—5:00 PM**



Thanks for your continued efforts and support.

If you have questions or concerns please contact us by e-mail:  
[membership@ohea.org](mailto:membership@ohea.org)  
Or by telephone: InfoOEA  
(844) 632-4636

- **Membership Enrollment Materials** for the 2020-2021 Membership Year were distributed in June. Some materials were mailed directly from OEA to the home address of the Treasurer on record and included: Continuous Member Roster for Review, New Year Processing Documents, and a return envelope. The Enrollment and Renewal Forms were also sent to the home address of the Treasurer of record and shipped directly from our print vendor. This means the Treasurer received two separate mailings for the 2020-2021 membership enrollment materials. Both mailings shipped beginning June 15th.  
**COVID-19 AND ENROLLMENT PROCEDURES:** Considering the current circumstances with COVID-19, membership drives and enrollment may look very different this year and you may be having current discussions now as to how best to reach your members. OEA has attempted to assist you with the task of member enrollments while you may be following suggested social distancing protocols and unable to meet face-to-face with your members.
  - ⇒ We have provided a postage paid, pre-addressed mailing envelope for each of your renewal forms. We have also provided a blank, postage paid envelope to be sent with each renewal form so the member can easily return the form to the address of your choosing.
  - ⇒ OEA suggests your local determine the best way for the membership forms to be collected, label the blank postage paid envelope with the address to which you wish to have the forms returned and then simply mail out to your members for signature.
- Your annual Dues Transmittal Agreement which is to be updated and returned before September 30, 2020 will be mailed to you in the coming weeks. Remember, your monthly billing statements are based on this information. Please take a moment to review and provide the requested information for the new 2020-2021 membership year.
- Please continue to report any new election results to your OEA field office with name, address, non-work phone number and a non-work e-mail address prior to the end of July. Advising your OEA Field Office immediately of any change to your local leadership along with providing a non-work e-mail address and a non-work phone number for all local leaders helps support OEA's efforts in timely communication.

#### **Some items to put on your "to-do" list as the 19-20 year comes to a close**

- **Membership Reconciliations**—Reconcile your membership with OEA and your employer. See "Reconciliation of Local Association Members" in the Treasurer's Handbook for details.
- **Timely Payments**—Check your billing statement and dues transmittal agreement schedule and bring all outstanding dues payments current.
- **Local Association Leader Updates**—Send all changes to your OEA field office.

#### **And if you are an outgoing Treasurer:**

- ⇒ Review Duties and Responsibilities (Treasurer's duties should be outlined in your local's constitution and bylaws. Additional guidelines can be found in the OEA Treasurer's Handbook in the Quick Reference section.)
- ⇒ Forward the Treasurer's Handbook with any notations you have made
- ⇒ Discuss Bank Account Signature and Access Changes
- ⇒ Review budget
- ⇒ Complete Change of Address for: Bank, School District and IRS.
- ⇒ Attend an OEA Treasurer's Workshop together.

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

## Questions?

### Where is my monthly billing statement?

- ◆ Due to our current work environment, we have moved to electronic versions of our monthly billing statements and they will not be mailed to you. If you have not yet logged into the eBilling portal, please navigate to <https://ims.nea.org/ebilling/> and click on the Forgot Password link—enter your email address when prompted. Within minutes you should receive an email from NEA Help [neahqhelp@nea.org](mailto:neahqhelp@nea.org), providing a temporary password to go online and activate the local's account. Click the eBilling portal link in the email or copy and paste <https://ims.nea.org/ebilling/>. Enter your email address as the Username and enter the temporary password. Once logged in, you will be required to immediately change the password to your own. *(At any time if you forget your password a new temporary password can be requested by clicking on the forgot password link.) Once you have gained access you have access to your current and past billing statements, membership rosters and all billing detail. **Important: We utilize the email you have on file to send these billing statements. Please confirm we have your active email address on file or you may not receive important communications from OEA.***

### What are all these forms I have received and how are they used by OEA?

#### Dues Transmittal Agreement

- ◆ The Dues Transmittal Agreement provides OEA with the date range of your locals payroll deductions. This allows OEA to set up your billing cycle for the year based upon the number of members in the local and the number of payroll deductions. The agreement is an annual contract between the local and OEA. If no update is received, OEA bases billing on prior year payroll dates. (See pg 1-21 of the Treasurer's Handbook for additional information)

#### IRS-990 Verification Form

- ◆ IRS 990 Verification form shows that the local is tax exempt and is proof that the local has filed exempt status with the IRS. This must be submitted annually to the IRS and OEA. (See pg 0-5 of the Treasurer's Handbook for additional information)

#### Continuous Roster

- ◆ This is a listing of the local's members on record where membership automatically rolls forward from year to year. It allows the local to make updates (such as cancellations, change to membership type, administrative updates, building change) to the member records. This is critical as the billing for a local is based upon the number of members. If OEA is not notified of cancellations, the local continues to be billed for that individual. (See pg 1-14 through 1-18 of the Treasurer's Handbook for additional information)

⇒ All members who wish to cancel their membership and become a non-member need to inform you of this desire by August 31, 2020.

#### Enrollment Summary/Potential Count Form

- ◆ This form is used to reconcile the number of members that the local has submitted with their enrollment forms. The cash payer section is used to verify the payment sent by the local for cash payers (one check on the Local's bank account) sent with the enrollment materials. (See pg 1-29 of the Treasurer's Handbook for additional information)

## Miscellaneous:

### 2020 District Treasurer's Workshops

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

**\*\*\*PLEASE CONFIRM WITH YOUR LOCAL DISTRICT REGARDING RECENT CHANGES TO THESE SCHEDULED DATES. OEA WILL CONTINUE TO PROVIDE UPDATES AS DETAILS ARE PROVIDED DUE TO COVID-19.**

ECOEA on July 15, 2020: NWOEA on July 20, 2020: NEOEA on July 22, 2020: SEOEA on July 23, 2020: NCOEA on July 29, 2020: EOEA on August 3, 2020: WOEA on August 4, 2020: SWOEA on August 5, 2020.

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