

# OEA MEMBERSHIP DEPARTMENT

## 2020-2021

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

November 29, 2020

#### December Reminders:

- **5th**—OEA Representative Assembly
- **22nd**—OEA Offices will close for Winter break and will re-open January 4, 2021
- **27th**—Dues payment to OEA. (Remember to include your local's 4-digit ID number on your check payments.)
- December billing statements are mailed after winter break. Therefore you may receive it a few days later than normal.

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

#### InfoEA HOURS -

Monday—Friday  
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**  
Or by telephone: InfOEA at  
1-844-632-4636

The November 2020 billing statement is now available in the eBilling Portal, <https://ims.nea.org/ebilling/>. The most current roster is available on the eBilling portal and is accessible at any time. Please be sure to take time to thoroughly review your billing statement and membership roster in order to reconcile your membership information.

#### Ohio Education Association Membership Reconciliation Tips

Your local's billing and monthly amount due to OEA is dependent on accurate membership records. OEA relies on local associations to provide accurate and timely information to both OEA and the employer payroll department. To ensure proper billing, it is imperative the local, employer and OEA membership records match. It is important to have strong communication between you and your payroll office.

The OEA monthly billing for each membership year is calculated based on the local's current membership records and the local's Dues Transmittal Agreement for that membership year.

To confirm the local is collecting the correct amount of dues per member, and that OEA is billing the local for the correct memberships for the membership year, it is important the local maintain ongoing membership reconciliation throughout the membership year. You, as Treasurer, should be receiving from your payroll office the exact amount OEA is billing you each month. If that is not occurring, it is important you take the time to review all membership records.

Some quick things to check:

- Compare the OEA membership roster to the payroll deduction list received with each payment from the employer. Do the lists match? Is everyone currently having deductions?
- Verify that each member's payroll deduction amount is enough to meet their full year's dues obligation before payroll deductions come to an end for that membership year. Have there been deductions missed? Are the deducted amounts correct?
- Confirm the local has collected the full year's dues obligation for all cash payers as those are due in full at the start of the membership year.
- If members are missing from the OEA roster and/or the payroll deduction list, investigate and take corrective action to make sure the members' dues obligation amounts are being met. Work with your payroll office and/or OEA Membership to make sure all have the exact same information.

The update form provided to you each month should be used to make any needed changes or edits. Providing these updates will ensure all billing will remain accurate and current throughout the membership year.

Please reference the Treasurers Handbook Chapter 1 section titled: "Reconciliation of Local Association Members" for additional information.

If you have questions or need additional detailed assistance regarding reconciling your local's membership records, contact infoOEA at 1-844-632-4636 or [membership@ohea.org](mailto:membership@ohea.org).

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

## **IRS-990 Filing**

The OEA IRS-990 Verification Form must be returned to OEA no later than January 20, 2021. This is a confirmation of your 990 tax filing required for all locals and is also a criterion for the Local Treasurer's Award. **Contact Shawn Primm at [primms@ohea.org](mailto:primms@ohea.org) for IRS filing assistance.**

When processing your **annual** 990-Filing with the IRS during the period of September thru January 15<sup>th</sup>, remember this filing is for the 2019-2020 Fiscal/Membership Year (if the period is from September 1<sup>st</sup> – August 31<sup>st</sup>) and **tax year 2019**.

## **Upcoming Deadlines:**

- January 20th—IRS 990 Verification submitted to OEA
- January 30th—The application for the Fiscal Fitness Award needs to be received by the OEA Secretary/Treasurer. Locals have the opportunity to meet the criteria for the 2020 award based upon their financial performance for fiscal year 2019-2020. The OEA Fiscal Fitness Awards will be given at the May 2021 Representative Assembly where locals will be recognized with cash awards for their financial performance. All of the criteria and the process for participating in this program are available online by logging onto the OEA website. The OEA Treasurer's Handbook is another source of information.

## **ONLINE ENROLLMENT!!**

The OEA Membership Department is excited to announce the availability of on-line Enrollment for the 2020-2021 Membership Year.

We are offering the new "Join Now" functionality as an alternative to the paper form should you be unable to "meet and greet" your new members and have them complete the paper version of the enrollment form in this period of social distancing. In order to utilize the online enrollment process the new member must agree to continuous membership and the payroll deduction payment method for the collection of their dues. (A cash paying member, an annual renewal member or those wishing to pay via the eDues payment method will be unable to use the online process at this time and must use the paper form.)

The on-line module is extremely easy to use and requires only a few "clicks" to complete the enrollment process. "Join Now" is available now and can be accessed via the OEA website at: [www.ohea.org/why\\_belong](http://www.ohea.org/why_belong)

Once on the "Why Belong" web page the new member will select "Join Now" and will immediately begin the enrollment process. The user will find the process very intuitive as they will just need to follow the screens and provide the information requested. Upon completion of their enrollment, the new member will be provided a confirmation reflecting the information they submitted along with their new member ID number. This confirmation will be sent directly to the member via their email address and a copy will be sent to the OEA Membership Department.

The OEA Membership Department will provide a roster of all online enrollments directly to you, the Treasurer, on a weekly basis.

Any questions or technical issues that may occur during the enrollment process should be directed to the membership department at 1-844-632-4636 or [membership@ohea.org](mailto:membership@ohea.org).