

OEA MEMBERSHIP DEPARTMENT 2020-2021

Monthly Membership Guide & Updates For Local Association Leaders

July 31, 2021

August Reminders:

- 25th —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.

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

- ⇒ 21-22 Local Treasurer's Handbook
- ⇒ Monthly Treasurer's Memos (past 12 months)
- ⇒ 21-22 Dues Rates and Pro-Rate Dues Tables
- ⇒ Forms for reconciliation
- ⇒ Membership Update form

OEA Office Summer Hours:

(From 6/1/2021 - 8/31/2021)

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
Or by telephone: InfoOEA
(844) 632-4636

The July 2021 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.

July Treasurer Highlights

- As the 2020-2021 membership year draws to an end, it is important that a reconciliation of your current year local membership records be completed and any necessary changes be submitted to the OEA Membership Department.
- Remember OEA Membership cancellation or non-membership notifications should be received between August 1 and August 31, 2021 unless your local association has differing notification requirements from that of the Ohio Education Association.
- Dues Transmittal Agreements were mailed in June and are due back to OEA by September 30th. Remember, your monthly billing statements are based on this information. Please take a moment to review and provide the requested information for the new 2021-2022 membership year.

- **Membership Enrollment Materials** for the 2021-2022 Membership Year were mailed 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, Treasurer's Handbook and a return envelope. The Enrollment and Renewal Forms and Ohio Fund contribution 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 2021-2022 membership enrollment materials. If you do not have these important documents, please contact OEA Membership.

COVID-19 AND ENROLLMENT PROCEDURES: In consideration of the evolving COVID-19 protocols, you may be having current discussions now as to how best to reach your members for upcoming drives and enrollment. Again this year, 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.

⇒ **OEA now offers online enrollment.** The online enrollment allows new enrollees to complete the enrollment process with just a few clicks within the OEA website. "Join Now" can be accessed via the OEA website at: 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. 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.
- An electronic roster of all online enrollments will be sent directly to the appropriate Local Treasurer's email of record as new members join.
- All new enrollees must agree to continuous membership and must pay their dues obligation via the payroll deduction payment method. A cash paying member or those wishing to utilize the eDues payment method will still need to complete a paper enrollment form. In addition, online enrollment currently does not allow for the renewal process and therefore annual renewal individuals will also need to complete a paper renewal form.

⇒ For those locals that may have annual renewal members, we have provided a postage paid, pre-addressed mailing envelope for each of your renewal forms. (If you did not receive Renewal forms, this does not apply to your local.) Please note the envelope address matches up with the pre-printed renewal form for ease of mailing. In addition, 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.

⇒ We suggest the 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.

Some items to put on your "to-do" list as the 20-21 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 (pg.1-27) 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.

NEW TREASURER?

Remember the Membership Department is here to help you! Call us or email us with any questions you may have regarding membership processing or procedures. Our contact information, via email: membership@ohea.org, phone Toll free InfOEA at (844) 632-4636 Monday—Friday from 8:30 AM—5:00 PM.

Questions?

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 between August 1 and August 31, 2021.

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:

2021 District Treasurer's Workshops

The following OEA District Treasurer's Workshops remain for the current year:

EOEA on August 3, 2021 Virtual: SWOEA on August 5, 2021

*****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.**