

OEA MEMBERSHIP DEPARTMENT

2020-2021

Monthly Membership Guide & Updates For Local Association Leaders

June 30, 2021

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 5th

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 June 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.

Membership Enrollment Materials for the 2021-2022 Membership Year are currently being distributed. Some materials are mailing directly from OEA to the home address of the Treasurer on record and include: Continuous Member Roster for Review, New Year Processing Documents, Treasurer's Handbook and a return envelope. The Enrollment, Renewal Forms and Ohio Fund contribution forms are also being sent to the home address of the Treasurer of record and shipped directly from our print vendor. This means the Treasurer will receive two separate mailings for the 2021-2022 membership enrollment materials. *Be sure to notify your local President when you have received your enrollment materials.*

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 membership 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 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.

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) This form is to be updated and returned by September 30, 2021.

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 0-4 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, 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)

- 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.
- **If you are an outgoing Treasurer:**
 - ⇒ Review Duties and Responsibilities with the new Treasurer (Treasurer's duties should be outlined in your local's constitution and by-laws. 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.

Miscellaneous:

2021 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 ANY CHANGES TO THESE SCHEDULED DATES.**

WOEA on July 14, 2021 Virtual: ECOEA on July 15, 2021 Virtual: NWOEA on July 20, 2021 Virtual: NEOEA on July 21, 2021 Virtual: SEOEA on July 22, 2021: NCOEA on July 29, 2021 Virtual: EOEA on August 3, 2021 Virtual: SWOEA on August 5, 2021.