

# OEA MEMBERSHIP DEPARTMENT

## 2021-2022

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

June 30, 2022

#### July Reminders:

- **28th—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 Monday, July 4th

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

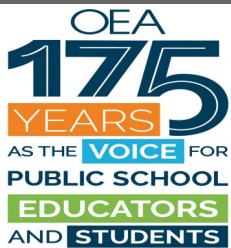
- ⇒ 22-23 Local Treasurer's Handbook
- ⇒ Monthly Treasurer's Memos (past 12 months)
- ⇒ 22-23 Dues Rates and Pro-Rate Dues Tables
- ⇒ Forms for reconciliation
- ⇒ Membership Update form

#### OEA Office Summer Hours:

(From 6/1/2022 - 8/31/2022)

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

The June 2022 billing statement is now available for your review 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 2022-2023 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. A limited supply of blank Enrollment forms along with the pre-printed Renewal Forms are also being sent to the home address of the Treasurer of record and shipped via UPS directly from our print vendor. This means the Treasurer will receive two separate mailings for the 2022-2023 membership enrollment materials. **The OEA Fund contribution forms (formerly FCPE) will be sent to you in a separate mailing in mid-July.**

Don't want to Handle paper enrollment forms?

#### Join Now Online Enrollment for new members

A new member can [Join Now](#) via the OEA website: [www.ohea.org/why\\_belong](http://www.ohea.org/why_belong). Once on the "Why Belong" web page the new member will select the "Join Now" button 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. For questions or additional information, please call membership at 1-844-632-4636 or [membership@ohea.org](mailto:membership@ohea.org).

- Be sure to notify your local President when you have received your enrollment materials and the OEA Fund contribution forms.
- **COVID-19 AND ENROLLMENT PROCEDURES:** In consideration of the evolving COVID-19 protocols, we will be sending the same enrollment materials as were provided last year.
  - ⇒ You will be 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.

#### Some items to put on your "to-do" list as the 21-22 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, 2022.

#### 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, 2022.

#### Enrollment Summary/Potential Count Form

- ◆ Potential Membership Count is the total count of every employee position which is in your defined bargaining unit and eligible for membership. Therefore, this count includes those individuals who are members and non-members. Your Payroll or Human Resource Department should have this number available for your local's use. Please verify the number from your Payroll or Human Resource Department before providing the 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:

### 2022 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.**

NWEOA on July 12, 2022: WOEa on July 13, 2022: ECOEA on July 14, 2022: NEOEA on July 20, 2022: SEOEA on July 21, 2022: SWOEA on August 3, 2022 (with Virtual option): EOEa on August 9, 2022 (Virtual): NCOEA on August 10, 2022 (Virtual).