

OEA MEMBERSHIP DEPARTMENT

2022-2023

Monthly Membership Guide & Updates For Local Association Leaders

February 28, 2023

Monthly Reminders:

- 40% of Dues Obligation required by 3/15/2023
- 3/30/23—Dues payment to OEA. (Remember to include your local's 4-digit ID number on your check payments.)

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

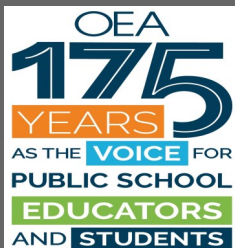
InfoOEA HOURS -

Monday—Friday
8:30 AM-5:00 PM

The February 2023 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.

- **As A Reminder:** NEA Bylaw 2-9 requires each local association to have transmitted at least forty percent (40%) of its dues to the OEA by March 15 and seventy percent (70%) by June 1, unless the contracted transmittal schedule stipulates otherwise.
- **2023-2024 Membership Enrollment Materials** will be mailed to the home address of the treasurer on record once the details have been finalized. We anticipate this mailing to be done in June. You may want to share this information with the other officers in your local. It is important to have the correct Treasurer, and other officers on record. Please report any new election results to your OEA field office with name, address, non-work phone number and a non-work e-mail address as soon as possible. Please be aware the OEA Fund (formerly FCPE) contribution forms will be sent to the Treasurer's home address again this year.
- **Early Enrollment begins April 1st for the 2023-2024 Membership Year.** The Early Enrollment program is available to any new active member who may want to join for the upcoming 23-24 Membership year and be eligible for certain NEA benefits prior to the beginning of the new membership year. Dues obligation is delayed until September for any early enrollee. Talk with your Labor Relations Consultant to establish an action plan for early enrollees. To join, go to www.ohea.org/why_belong.
- **Important:** The Tax Cuts and Job Act effective tax year 2018 suspended the previous deduction for job-related expenses or other miscellaneous itemized deductions that exceeded 2 percent of adjusted gross income. This suspension includes unreimbursed employee expenses such as union dues. These expenses are no longer deductible. Therefore, the annual "Deductible/Non-Deductible portion of dues" publication will not be produced. For further information please see your tax preparer or IRS publication 5307.



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

1-844-632-4636

Frequently Asked Questions:

Q. Where do I find a copy of the Annual "Deductible/Non-Deductible portion of dues" Document?

A. The Tax Cuts and Job Act effective tax year 2018 suspended the previous deduction for job-related expenses or other miscellaneous itemized deductions that exceeded 2 percent of adjusted gross income. This suspension includes unreimbursed employee expenses such as union dues. These expenses are no longer deductible. Therefore, the annual "Deductible/Non-Deductible portion of dues" publication will not be produced. For further information please see your tax preparer or IRS publication 5307.

Miscellaneous:

990 ANNUAL IRS FILING

The annual IRS 990 filing for fiscal year ending 8/31/2022 (Tax year 2021), was to be completed by January 15th, 2023. Local associations that have not filed a 990 are required to contact the IRS immediately at 877-829-5500.

2023 District Treasurer's Workshops

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

ECOEA on July 12, 2023: : NEOEA on July 19, 2023 SEOEA on July 24, 2023, EOEA on August 3, 2023 and NCOEA on August 8, 2023.

For your convenience, you can also attend another districts workshop by contacting them to reserve your seat if that date works better with your schedule. We will keep you informed as new workshops are scheduled.