

OEA MEMBERSHIP DEPARTMENT

2022-2023

Monthly Membership Guide & Updates For Local Association Leaders

June 30, 2023

July Reminders:

- **30th—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 Tuesday, July 4th

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

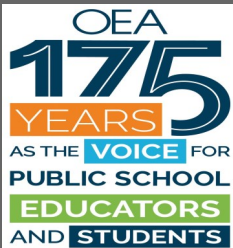
- ⇒ 23-24 Local Treasurer's Handbook
- ⇒ Monthly Treasurer's Memos (past 12 months)
- ⇒ 23-24 Dues Rates and Pro-Rate Dues Tables
- ⇒ Forms for reconciliation
- ⇒ Membership Update form

OEA Office Summer Hours:

(From 6/1/2023 - 8/31/2023)

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 2023 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 2023-2024 Membership Year will be distributed in June.** The materials will be mailed directly from OEA to the home address of the Treasurer on record as of June 1st and will include: Continuous Member Roster for Review, New Year Processing Documents, the 23-24 Treasurer's Handbook edition and a return envelope. A limited supply of blank enrollment forms along with the pre-printed Renewal forms and OEA Fund contribution forms will also be sent to the home address of the Treasurer of record directly from our print vendor. This means the Treasurer will receive two separate mailings for the 2023-2024 membership enrollment materials. Both mailings began shipping June 15th. **Do not return OEA Fund contribution forms with membership materials.**
- **ENROLLMENT PROCEDURES:** We have sent the same enrollment materials as were provided last year.
 - ⇒ A postage paid, pre-addressed mailing envelope has been provided 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.
- **Dues Payments Continue During The Summer Months**
 - ◆ As summer approaches and the end of the current school year is in sight, we wanted to take this opportunity to mention the schedule of dues payments. As a reminder, your locals dues obligation is based on the Dues Transmittal Agreement on file with OEA. The dues transmittal agreement establishes your billing cycle. If the transmittal agreement includes "summer months" you will receive billing statements for these months and payments are required even when school is not in session. In order to avoid penalties, please be sure to keep your payments in line with your billing cycle. The new ePay option should help make this easier! If you have any questions, please contact the Membership department Monday—Friday 8:30 AM—5:00 PM.
- OEA offers convenient **Online Enrollment**. The online module is very easy to use and requires only a few clicks and can be accessed via the OEA website at: www.ohea.org/why_belong. (See below for additional details.)

Join Now Online Enrollment

Access Join Now via the OEA website: 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.

- Be sure to notify your local President when you have received your enrollment materials and the OEA Fund contribution forms.

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 1-20 of the Treasurer's Handbook for additional information) This form is to be updated and returned by September 30, 2023.

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 1-19 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, 2023.

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 bylaws. 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:

ATTENTION NEW TREASURERS!

Are you new to being a Treasurer? Want to learn more about being a Treasurer and have the opportunity to have your questions answered? Make sure to sign up for a Treasurer's workshop, coming up this summer! You may attend any workshop you choose. Hint: Novice workshops are designed especially for our new Treasurers!

2023 District Treasurer's Workshops

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

CENTRAL on June 12, 2023 (Virtual for Novice and Experienced): ECOEA on July 12, 2023: WOEA on July 13, 2023: NWOEA on July 18, 2023: NEOEA on July 19, 2023 (Novice) and July 20, 2023 (Experienced): SEOEA on July 27, 2023 (Novice and Experienced): SWOEA on August 2, 2023 (Novice and Experienced—Virtual option available): OEA on August 3, 2023 (Virtual for Novice and Experienced) and NCOEA on August 8, 2023 (Virtual for Novice and Experienced).

*****PLEASE CONFIRM WITH YOUR LOCAL DISTRICT REGARDING RECENT CHANGES TO THESE SCHEDULED DATES. VIRTUAL SESSIONS HAVE BEEN NOTED ABOVE.**