

CHAPTER 1

MEMBERSHIP ENROLLMENT AND PROCESSING PROCEDURES








Chapter Table of Contents

SECTION I - MEMBERSHIP	1
Membership Types	1
Leave of Absence (LOA) Membership Reporting Guide	2
Membership Codes and Descriptions	3
SECTION II - DUES	4
Calculation Information	4
Annual Dues	4
United Education Profession (UEP) Dues	5
SECTION III - FORMS AND DOCUMENTS	6
Join Now Online Enrollment and QR Code	6
Enrollment Form Guidelines	7
Enrollment Form Overview	7
Example - Enrollment Form	8
Renewal Form Guidelines	10
Renewal Form Overview	11
Example - Renewal Form	12
Continuous Membership Roster Guidelines and Information	14
Continuous Membership Roster Overview	15
Example - Continuous Membership Roster	17
Making Corrections to the Continuous Membership Roster	18
Example - Continuous Membership Roster - with Corrections	19
Dues Transmittal Forms and Billing Statement Information	20
Example - Dues Transmittal Contract	21
Example - Dues Transmittal Agreement	23
Billing Statement Overview	24
Example - Billing Statement	26
ePay Overview	27
Reconciliation of Local Association Members	29
Reconciliation Tips	29
OEA Enrollment Summary/Potential Count	31
Local Association Reporting Form	32
Membership Update form	33
Membership Opt-Out after August 31	33
Example - Membership Update form	35

SECTION IV – TREASURER HELP AND GUIDANCE 37
Completed Materials Checklist37
Membership Processing and Accounting Master Schedule39
Additional Helpful Reminders40
Membership Card 41
Membership Card Example 42

SECTION V – RETIRED MEMBERSHIPS 43
Guidelines for Retired Membership43
Example – Retired Membership Form 44 and 45

TIPS from OEA Secretary/Treasurer Membership Enrollment & Processing Procedures

-  Section III of this chapter will help you to understand the Forms and Documents you will utilize in your role as Treasurer.
-  Just like your personal accounts, you must balance the local's membership records. See Section III for Membership Reconciliation Procedures.
-  See the "Leave of Absence (LOA) Membership Reporting Guidelines" for information regarding Leave of Absence.
-  Dues Tables and Treasurer's Handbook Chapters are available for online access by logging into the OEA web site: www.ohea.org (Select "Login/Register" and enter your user ID and password, select "Resources", select "Secretary-Treasurer's Office", select "OEA/NEA Dues", select the current membership year "OEA/NEA Dues")
-  The Dues Tables and List of Affiliated Department and Associate Organizations are located at the front of the Treasurer's Handbook in the Quick Reference Section.
-  Sensitive member data is on all membership enrollment materials. It is therefore critical for associate representatives to use discretion when handling these materials.
-  **Records Retention can be found in chapter 2 Accounting and Tax Issues page 2-42.**

SECTION I – MEMBERSHIP

Membership Types and Codes

There are various types of memberships available to individuals in the bargaining unit.

- **ACTIVE MEMBERSHIP:** Open to any person who:
 - (I) is employed by or in a public school district, public or private college or university, or other public institution devoted primarily to education, regardless of the specific nature of the functions that person performs at the work site and regardless of who actually employs the person;
 - (II) is employed by a public sector employer other than a school district, college or university, or other institution devoted primarily to education, but who is employed primarily to perform educational functions;
 - (III) is on limited leave of absence from the employment described in items (I) and (II) above; or
 - (IV) is serving as an executive officer of the Association.

The Association shall continue to allow active membership to those active members who:

- **have been laid off due to a reduction in force for as long as such persons are eligible to be recalled, or for three (3) years, whichever is longer; or**
- **have been discharged, for as long as a legal challenge to such discharge is pending, who agrees to adhere to the Code of Ethics of the Education Profession, and who maintains membership in local and district affiliates and the NEA where eligible, and who is not eligible for any other class of membership as defined herein; or**
- **are receiving a disability benefit while currently on approved leave of absence by the Board of Education and are within the first five years of the disability benefit based on the first date of eligibility of the benefit.**
- **active membership will be continued for an OEA member who is a military reservist called to active duty. Dues for such member will be suspended until they return to previous education employment.**
- **ASSOCIATE MEMBERSHIP:** (Not currently available) Open to any person who is interested in advancing the cause of public education but who is not employed by an educational institution, agency or organization and who is not eligible for any other class of membership in the Association.
- **INDIVIDUALS WITH OPEN LEGAL CASE:** Individuals with an ongoing legal matter (case is not yet closed) must maintain membership throughout the life of the case. As these individuals have certain requirements including maintaining their dues obligation while the legal case is open, the local representative responsible for membership should contact the OEA Membership Department to determine eligibility and the required dues amount.

- **MEMBERS ON OFFICIAL LEAVE OF ABSENCE (LOA):** A member on an official leave of absence which is approved by the employer is not free of the dues obligation while on leave. However, should the duration of the leave of absence be longer than one-half (1/2) of the school year, the member may be eligible for a dues reduction. (February 1 is the date used to determine half-year leave status.)

Leave of Absence (LOA) Membership Reporting Guidelines:

A member on official LOA, either paid or unpaid is not free of the dues obligation.

- Member on official LOA being paid full time salary: The member pays the full UEP (NEA, OEA, Uniserv, District and Local) dues. The membership does not need to be updated and the local does not need to notify OEA.
- Full-time members on official LOA not being paid their full-time salary for half or more of the school year shall pay half-time dues for their membership type. February 1 is the date used to determine half-year leave status.
- Half-time members on official LOA not being paid their full-time salary for half or more of the school year shall pay quarter-time dues for their membership type.
- Quarter-time members on official LOA not being paid their full-time salary for half or more of the school year, the local representative should contact the OEA Membership Department for the UEP dues amount.
- Only dues paying members are eligible for rights, privileges and benefits provided with unified dues.
- Contact your OEA assigned Labor Relations Consultant for questions regarding the information contained in the local bargaining contract that refers to payroll deductions and collections.

All questions regarding Leave of Absence should be directed to membership@ohea.org or by calling InfoOEA at 1-844-632-4636.

Membership Codes

Many of the forms and documents you will be utilizing require the use of Membership Type Codes. Please be sure to familiarize yourself with these identifiers.

The following levels of membership are available to the members of a bargaining unit. The codes are used for reporting/billing and classifying the different membership types.

Active Educator Full-Time (AC-1-100)

- Classroom teachers, professors, school nurses, pupil personnel workers that work more than half-time.

Active Educator Half-Time (AC-1-50)

- Classroom teachers, professors, school nurses, pupil personnel workers that work half-time or less.
- Active educators on official leave of absence for one-half or more of the school year, and who are not paid full-time salaries. (February 1 is the date used to determine half-year leave status.)
- Substitute employees.
- Educators in reduction in force (layoff) status for one-half or more of the school year and with statutory or contractual recall or rehire rights.

Active Educator Quarter-Time (AC-1-25)

- Classroom teachers, professors, school nurses, pupil personnel workers that work quarter-time or less.

Active Education Support Professional Full-Time (AC-2-100)

- Paraeducators such as educational aides, secretaries, custodians, food service personnel, bus drivers, etc. that work more than half-time.

Active Education Support Professional Half-Time (AC-2-50)

- Paraeducators such as educational aides, secretaries, custodians, food service personnel, bus drivers, etc. that work half-time or less.
- Active education support professionals on official leave of absence of one-half or more of the school year and who are not paid full-time salaries. This could include those active members who are classified by the employer as full-time employees but whose actual work hours are routinely less than full-time hours determined by the local association.
- Education support professionals in reduction in force (layoff) status for one-half or more of the school year and with statutory or contractual recall or rehire rights.

Active Education Support Professional Quarter-Time (AC-2-25)

- Paraeducators such as educational aides, secretaries, custodians, food service personnel, bus drivers, etc. that work quarter-time or less.

SECTION II - DUES



Dues tables can be found in the Quick Reference Section

Annual Dues

Association dues in Ohio are set at annual rates. Once members enroll, they have obligated themselves for the full annual dues rate appropriate to their membership classification. OEA Policy states dues are to be collected for that member even if the member is voluntarily or involuntarily terminated during the year. Any remaining dues obligation is to be withheld from the final paycheck unless the local association contract and bylaws contain other language.

Annual OEA dues of active members who are educators (such as classroom teachers, professors, school nurses, pupil personnel workers) shall be .0076 per dollar of the average salary for elementary and secondary classroom teachers in Ohio as established by the Ohio Department of Education for the second year prior to the budget year rounded to the nearest dollar, and an additional service fee shall be .0010 per dollar of the average salary for elementary and secondary public school classroom teachers in Ohio for the second year prior to the budget year rounded to the nearest dollar to be allocated to the support of the UniServ delivery system.

Annual OEA dues of active members who are education support professionals (paraeducators such as educational aides, secretaries, custodians, food service personnel, bus drivers, etc.) shall be as indicated in the Quick Reference Section under **Dues Tables**.

OEA dues of active members, whether educator or education support professionals, who are contracted to work less than half-time and are not paid full-time salaries, shall be half-time dues as indicated in the Quick Reference Section under **Dues Tables**. This could include those active members who are classified by the employer as full-time employees but whose actual work hours are routinely less than full-time hours determined by the local association. Active members who work less than one-quarter time, pay one-quarter of the NEA and OEA dues for the appropriate membership category.

In addition, the following members shall pay half-time dues as indicated in the Quick Reference Section under **Dues Tables**:

- (a) Active members on official leave of absence of one-half (1/2) or more of the school year and who are not paid full-time salaries.
- (b) Substitute employees.*
- (c) Members in reduction in force (layoff) status for one-half (1/2) or more of the school year with statutory or contractual recall or rehire rights.

*Substitutes eligible for membership through a Local Association will be defined in the local's bargaining contract. For assistance in determining eligibility, contact your Labor Relations Consultant. Substitutes not eligible for membership through a Local Association may contact the OEA Membership Department for an appropriate enrollment form.

United Education Profession (UEP) Dues

Dues amounts include portions for Ohio Education Association (OEA), UniServ service fee, National Education Association (NEA), District and Local Association dues. This total amount is referred to as "Unified Membership" and is printed on all materials and throughout this booklet. *Before using the membership forms, the amount included for local dues should be checked to ensure that the correct amount was used. **OEA is not responsible or liable for incorrect local dues amounts.***

The local is responsible for the collection of dues, the transmittal of membership forms and sending dues money to the OEA Membership Department. OEA Membership Department receives dues money for OEA, NEA, district and any affiliated organizations, as well as the OEA UniServ service fee. *Money collected from members for local dues should not be sent to OEA with dues payments.* For details regarding the procedure for handling PAC (Political Action Committee) monies, refer to the Treasurer's Handbook, Chapter 3 – OEA Fund.

Any person who newly enrolls for unified membership in an affiliated local association after the start of the membership year is eligible for prorated annual dues for their classification. The prorated annual dues shall be based on whole months, September through August. The application of the prorated dues provision **does not** apply to the UniServ fee. The Prorate table is not applicable to an individual who has canceled membership within the same membership year.

Any person enrolling (if eligible) where no affiliated local association is in existence or where they are not eligible for membership in the affiliated local shall not be entitled to the prorated dues provision. They shall pay either the full or half rate, dependent upon whether their eligibility for membership occurs before or after February 1 of the membership year.

SECTION III – FORMS AND DOCUMENTS

This section will review the different forms and documents utilized throughout the membership year to communicate membership information between your local association and the OEA Membership Department. A brief explanation and example of each form along with some guidelines for each have been provided. A Quick Reference Section per month has been included within the front section of this book to give you an idea of when these forms and documents would be required.

Join Now Online Enrollment info

OEA offers convenient online enrollment for new enrollments and annual renewals.

The on-line module is extremely easy to use and requires only a few “clicks” to complete the enrollment process. “Join Now” can be accessed via the OEA website at: www.ohea.org/why_belong or via QR code.



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.

Enrollment Form:

The Enrollment Form is an alternative way to enroll new members in your local bargaining unit.

You will be sent a limited supply of Enrollment Forms prior to the start of the membership year pre-printed with your local information including the unified dues amount for that particular membership year. Once these are completed they should be returned to OEA in the envelope provided.

Who fills out an enrollment form?

- New members in your local bargaining unit who do not wish to enroll online.

Who should not complete an enrollment form?

- Individuals already on the Continuous Membership Roster, unless they are changing pay method.

Enrollment Form Guidelines:

- Confirm the dues amount on the pre-printed enrollment form.
- All enrollment forms need a method of payment indicated (continuing payroll deduction, payroll deduction, cash or check). All checks should be made payable to the local association. Deposit any cash or check payments to the local's bank account and send **one** check to OEA.
- Make sure the member has signed and dated the form in all appropriate places. (2 signatures required.)
- At the beginning of the year a limited supply of new Enrollment Forms will be mailed to the Treasurer of record. Additional Enrollment forms may be requested from the Membership Department. These additional Enrollment forms will be sent in an electronic format.
- Return the top copy of the enrollment form to OEA as instructed in the packet.

Enrollment Form Overview:



See Example of form

The Membership Enrollment Form is to be used for new members, members who are not on the Continuous Roster or Renewal Forms.

- Social Security number is optional
- Primary Contact number is the number the member prefers to be contacted. It must not be a work phone number. It can be a cell phone number.
- Cell Phone number requires authorization to be used as a communication method.
- Signature required under membership enrollment.
- Signature required under dues authorization.

Example Enrollment Form (front)

Great Public Schools for Every Student! Membership Enrollment Form 2023 - 2024

OHIO EDUCATION ASSOCIATION
225 East Broad Street • Columbus, Ohio 43216
Phone: (614) 228-4526 or 1-844-632-4636
Email: membership@ohea.org
Enroll online at: www.ohea.org/why_belong

OEA/nea
TOGETHER WE ARE CREATING A FUTURE SHAPED BY OUR MEMBERS,
WORTHY OF OUR STUDENTS AND ESSENTIAL TO THE NATION.



LOCAL NAME / USER LOCAL ID

PERSONAL INFORMATION

LAST 4 DIGITS SOC. SEC. NO.
 CHECK BOX IF YOU ARE EMPLOYED HALF-TIME OR LESS
 CHECK BOX IF YOU ARE EMPLOYED QUARTER TIME OR LESS

FIRST - MIDDLE INITIAL - LAST (Jr, Sr, Etc.)

NAME

ADDRESS

CITY

STATE

ZIP

NON-WORK E-MAIL ADDRESS - THIS EMAIL ADDRESS IS USED FOR ALL MEMBERSHIP CORRESPONDENCE

PRIMARY CONTACT NUMBER

CELL PHONE NUMBER

*By providing my cell phone number, I understand that the National Education Association and its affiliates including, OEA, the Local Association, NEA Member Benefits, and NEA 360 may use automated calling techniques and/or text message me on my cellular phone on a periodic basis. The NEA, OEA, NEA360, NEA Member Benefits or my Local Association will never charge for text message alerts. Carrier message and data rates may apply to such alerts.

*ETHNICITY CODES

Native American/Alaska Native 01
 African-American/Black 03
 Hispanic 04
 White (not Hispanic origin) 05
 Asian 06
 Native Hawaiian/Pacific Islander 07
 Multi-Ethnic 08
 Other 09
 Unknown UK

*GENDER

Female F
 Male M
 Transgender Female TF
 Transgender Male TM
 Gender Expansive/Non-Conforming GE
 Other UK

DATE OF BIRTH

MO. DAY YR.

*Ethnic minority and Gender Information is optional and failure to provide it will in no way affect your membership status, rights or benefits in NEA, OEA or any of their affiliates. This information will be kept confidential.

SEE CODES ON BACK OF FORM

POSITION

PRIMARY SUBJECT TAUGHT

MASTER TEACHER

NBCT

FIRST TIME MEMBER?

Dues payments are not deductible as charitable contributions for federal income tax purposes. Dues payments (or a portion) may be deductible as a miscellaneous itemized deduction. Lobby expenses paid or incurred as part of membership dues cannot be deducted from your income taxes. The amount of the OEA membership dues attributable to lobby expenses and actual deductible dues dollars will be reported annually online and in the February issue of Ohio Schools Magazine for all levels of membership.

COLLECTOR'S SIGNATURE

DATE

ASSOCIATION	UNIFIED CODE	ANNUAL DUES
Unified Education Profession Dues (Local, Uniserv, District, OEA and NEA)		
Do you wish to be a member of another affiliated or associated organization? If so, indicate below the organization code(s) and annual dues amount (see back of form)		
Organization Code:	Fund ID:	
Organization Code:	Fund ID:	
Organization Code:	Fund ID:	
		TOTAL ANNUAL DUES

I understand that this agreement is voluntary and is not a condition of employment and that I have the legal right to refuse to sign this agreement without suffering any reprisal.

MEMBERSHIP ENROLLMENT AND COMMITMENT (Signature Required)
YES, I wish to become a member of the Local Association, Ohio Education Association, District and the National Education Association. I hereby request and voluntarily accept membership in these associations and agree to abide by the Constitution and Bylaws of all four associations.

X UNIFIED MEMBER'S SIGNATURE (REQUIRED FOR ALL MEMBERS)

DATE

DUES DEDUCTION AUTHORIZATION (Signature Required)
YES, I hereby authorize by method of payment below the payment of the total annual dues, fees and assessments of the organizations indicated herein in consideration for the services the union provides. I understand that these annual amounts are subject to periodic change by the governing bodies of the associations. If payment is by payroll deduction I also authorize and direct my employer to deduct said amounts from my earnings, consistent with the method of payment authorized (Annual or Continuing) and local policy. By choosing continuing payroll deduction I authorize the continuous deduction of said amounts from year to year hereafter without further authorization by me in the amounts to be certified to my employer from time to time. In the event my employment is voluntarily or involuntarily terminated, or I take an unpaid leave of absence, I agree to the payment of the membership dues obligation as accepted unless I revoke this authorization in writing. The payment of the membership dues obligation is accepted unless I revoke this authorization in writing received during the period of August 1 and August 31 of the membership year immediately preceding the membership year in which the authorization is to be cancelled. In the event I wish to revoke my authorization of membership outside of the period stated above, I agree to pay the OEA as collection agent for the dues amount indicated herein by continuing payroll deduction or other arrangement, the remainder of the amounts for the membership year regardless of my membership status.

METHOD OF PAYMENT (CHECK ONE BELOW)

AUTHORIZED BY CONTINUING PAYROLL DEDUCTION
 CASH OR CHECK (CHECK #)

X SIGNATURE REQUIRED

DATE

Example Enrollment Form (back)

The following information is represented in the form of codes. Please select the appropriate code and write it in the space provided on the front of this form.

PK-12	HIGHER EDUCATION	EDUCATIONAL SUPPORT (ESP)	UNIFIED CODES
Adult Educator	ADHD	Blg/Grds Maint/Repairs	AC-1-100
Classroom Teacher	CLTR	Bus/Truck/Van Driver	AC-2-100
Couch (Activity/Sport)	COCH	Computer/Technician Services	
Counselor	CNSL	Custodian	MASTER TEACHER
Health/Student Services	HLTH	Food Service	Yes
Institutional Specialists/Tutor	INSP	Health/Student Services	No
Literatur/Media Specialist	LIBR	Instructor	
Nurse	LNRS	Lecturer	NBCT
Occupational Therapist	OCCT	Libary Assistant/Technician	
Physical Therapist	PHYS	Mechanic/Repairer	National Board Certified Teacher?
Psychologist	PSYC	Printing Services	Yes
Reading Specialist	READ	Security	No
Rotation Specialist	ROTC	Secretarial	
Intervention Specialist/Special Education	SDSP	Special Education Assistant	
Speech/Hearing	SHTH	Teacher Aide/Parameicator	
Other	OTHR	Other	

AFFILIATED DEPARTMENTS ANNUAL DUES (Requires OEA membership if eligible)		
Code	Fund ID	Dues
OAESPP	F24	\$5.00
OASNSP	F01	\$10.00
ASSOCIATE ORGANIZATIONS ANNUAL DUES		
OAEA	F02	\$50.00
OSCA	F04	\$60.00
OCTELA	F06	\$40.00
OAHPERD	F07	\$50.00
OTEEA	F08	\$35.00
OCTM	F09	\$25.00
DLAMC	F10	\$15.00
OFLA	F11	\$55.00
SECO	F13	\$30.00
OCSG	F14	\$30.00
OEAWC	F16	\$15.00
OMLA	F23	\$30.00
GLBTC	F25	\$10.00
OASCD	F26	\$30.00
OELMA	F27	\$65.00
OE-AHSC	F29	\$10.00

PK-12	PRIMARY SUBJECT TAUGHT	EDUCATIONAL SUPPORT (ESP)
Adult Education	ADHD	Not Applicable
Agric & Natrl Resources	AGNR	
Arts	ARTS	
Basic Education Curriculum	BEDC	
Business Education	BSRE	
Career and Technical Education	INAR	
Civics/Govern/Poli Sci	CGPS	
Computer & Info Science	CICS	
Early Childhood	ECDE	
Elementary Curriculum	ELED	
English as a Second Lang	ENSL	
English/Language Arts	ELAR	
Family and Consumer Science	FCSC	
Foreign Language	FLLI	
Geography	GEOG	
Health	HLED	
History	HIST	
Marketing	MARK	
Mathematics	MATH	
Middle School Curriculum	GMDC	
Music	MUSI	
Physical Education	PHED	
Psychology	PSYC	
Reading	READ	
Science	PHSC	
Social Studies	SSSS	
Special Education	SDED	
Hearing Impaired	SHIM	
Visually Impaired	VIM	
Vocational & Technical Education	VTED	
No Subject Taught	NONE	
Other	OTHR	

Renewal Form:

The Renewal Form is used to renew enrollment for those members who are on record as a “non-continuous” member. Each member has the option to become a “continuous” or “non-continuous” member when they initially enroll which signifies their choice to have dues deductions continue year to year automatically (“continuous”) or be required to authorize those deductions each year (“non-continuous”). For those that have chosen to be “non-continuous,” the “Renewal Form” must be used.

You will be sent Renewal Forms prior to the start of the membership year. These forms will be pre-printed with the individual’s information as well as your local information including the unified dues amount for that particular membership year. Once the member has signed the form they should be returned to OEA in the envelope provided.

A member can also easily renew their membership online via Join Now at www.ohea.org/why_belong or via QR code.



Renewal Form Guidelines:

- A renewal form is printed for everyone on record with OEA that is a non-continuous member.
- Confirm all information including pre-printed dues amount is correct.
- If an individual does not receive a Renewal Form with their name on it and is not on the Continuous Membership Roster they **must** complete an Enrollment Form.
- Make sure the member has signed and dated the form in all appropriate places (2 signatures required).
- The membership collector must sign and date each enrollment form. This signature and date provides verification of the effective date of coverage under the OEA/NEA Legal Services Program.
- All renewal forms need a method of payment indicated (continuing payroll deduction, payroll deduction, cash or check). All checks should be made payable to the local association. Deposit any cash or check payments to the local’s bank account and send **one** check to OEA.
- Return the top copy of the renewal form to OEA as instructed in the packet.

Grace Period

Members enrolled from renewal forms on an annual basis are assumed to have continued UEP membership without interruption into the next membership year, as long as they re-enroll with their local prior to September 30. A member who re-enrolls after September 30 shall be assumed to have interrupted their membership and shall not be entitled to any privileges, benefits or rights of membership for the period from September 1 to the date of their re-enrollment.

Renewal Form Overview:



See Example of form

The Membership Renewal Form is to be used for members who prefer to authorize membership each year.

- Social Security number is optional.
- Primary Contact number is the number the member prefers to be contacted. It must not be a work phone number. It can be a cell phone number.
- Cell Phone number requires authorization to be used as a communication method.
- Signature required under membership enrollment.
- Signature required under dues authorization.

Example Renewal Form (front)

OEA/nea
 NATIONAL EDUCATION ASSOCIATION
 Together we are creating a future shaped by our members, worthy of our students and essential to the nation.
 INSTRUCTIONS: Please review all information

Great Public Schools for Every Student!
Membership Renewal Form
2023 - 2024



LOCAL NAME / USER LOCAL ID _____
 WORK LOCATION NAME / USER WORK LOCATION ID _____

LAST 4 DIGITS SOC. SEC. NO. _____ IND: _____
 MBR: _____
 FIRST - MIDDLE INITIAL - LAST (JR, SR, ETC.) _____
 CELL PHONE NUMBER _____
 NAME _____
 ADDRESS _____
 CITY _____ STATE _____ ZIP _____

ASSOCIATION	UNIFIED CODE	ANNUAL DUES
Unified Education Profession Dues (Local, UnServ, District, OEA and NEA)		
Do you wish to be a member of another affiliated or associated organization? If so, indicate below the organization code(s) and annual dues amount (see back of form)		
Organization Code:	Fund ID:	
Organization Code:	Fund ID:	
Organization Code:	Fund ID:	
TOTAL ANNUAL DUES		

NON-WORK E-MAIL ADDRESS - THIS EMAIL ADDRESS IS USED FOR ALL MEMBERSHIP CORRESPONDENCE _____
 PRIMARY CONTACT NUMBER _____
 *By providing my cell phone number, I understand that the National Education Association and its affiliates including, OEA, the Local Association, NEA Member Benefits, and NEA 360 may use automated calling techniques and/or text message me on my cellular phone on a periodic basis. The NEA, OEA, NEA360, NEA Member Benefits or my Local Association will never charge for text message alerts. Carrier message and data rates may apply to such alerts.

Understand that this agreement is voluntary and is not a condition of employment and that I have the legal right to refuse to sign this agreement without suffering any reprisal.
MEMBERSHIP ENROLLMENT AND COMMITMENT (Signature Required)
 YES, I wish to become a member of the Local Association, Ohio Education Association, District and the National Education Association. I hereby request and voluntarily accept membership in these associations and agree to abide by the Constitution and Bylaws of all four associations.

ETHNICITY CODES
 01 Native American/Alaska Native
 02 African-American/Black
 03 Hispanic
 04 White (not Hispanic origin)
 05 Asian
 06 Native Hawaiian/Pacific Islander
 07 Multi-Ethnic
 08 Other
 09 Unknown
 UK not listed

*GENDER
 F Female
 M Male
 TF Transgender Female
 TM Transgender Male
 GE Gender Expansive/Non-Conforming
 UK not listed

DATE OF BIRTH: _____ MO. _____ DAY _____ YR. _____

UNIFIED MEMBER'S SIGNATURE (REQUIRED OF ALL MEMBERS) _____ / _____ / _____ DATE

DUES DEDUCTION AUTHORIZATION (Signature Required)
 YES, I hereby authorize by method of payment below the payment of the total annual dues, fees and assessments of the organizations indicated herein in consideration for the services the union provides. I understand that these annual amounts are subject to periodic change by the governing bodies of the associations. If payment is by payroll deduction I also authorize and direct my employer to deduct said amounts from my earnings, consistent with the method of payment authorized (Annual or Continuing) and local policy. By choosing continuing payroll deduction I authorize the continuous deduction of said amounts from year to year hereafter without further authorization by me in the amounts to be certified to my employer from time to time. In the event my employment is voluntarily or involuntarily terminated, or I take an unpaid leave of absence, I agree to the payment of the membership dues obligation as accepted unless I revoke this authorization in writing. The amount of the membership dues obligation is accepted unless I revoke this authorization in writing received during the period of August 1 and August 31 of the membership year immediately preceding the membership year in which the authorization is to be cancelled. In the event I wish to revoke my authorization of membership outside of the period stated above, I agree to pay the OEA as collection agent for the dues amount indicated herein by continuing payroll deduction or other arrangement, the remainder of the amounts for the membership year regardless of my membership status.

SEE CODES ON BACK OF FORM

POSITION _____ PRIMARY SUBJECT TAUGHT _____ MASTER TEACHER _____ FIRST TIME MEMBER? _____
 YES NO YES NO YES NO YES NO

Dues payments are not deductible as charitable contributions for federal income tax purposes. Dues payments (or a portion) may be deductible as a miscellaneous itemized deduction. Lobby expenses paid or incurred as part of membership dues cannot be deducted from your income taxes. The amount of the OEA membership dues attributable to lobby expenses and actual deductible dues dollars will be reported annually online and in the February issue of Ohio Schools Magazine for all levels of membership.

METHOD OF PAYMENT (CHECK ONE BELOW)
 AUTHORIZED BY CONTINUING PAYROLL DEDUCTION
 CASH OR CHECK (CHECK # _____)

COLLECTOR'S SIGNATURE _____ / _____ / _____ DATE
 SIGNATURE REQUIRED _____ / _____ / _____ DATE

REORDER FROM: FORMOST GRAPHIC COMMUNICATIONS, INC. • 301-424-4242

Example Renewal Form (back)

The following information is represented in the form of codes. Please select the appropriate code and write it in the space provided on the front of this form.

PK-12		HIGHER EDUCATION		EDUCATIONAL SUPPORT (ESP)		UNIFIED CODES	
Adult Educator	ADED	*Administrator	ADMIN	Blg/Grnds Maint/Repairs	BGMR	Active Educator FT	AC-1-100
Classroom Teacher	CLTR	Assistant Professor (Non-Eval)	ACAD	Bus/Truck/Van Driver	BTVD	Active ESP FT	AC-2-100
Couch (Activity/Sport)	COCH	Associate Professor	ATPR	Computer/Technician Services	TSOT	MASTER TEACHER	
Counselor	CNSL	Counselor	ACPR	Custodian	CUST	Yes	
Health/Student Services	HLTH	Instructor	COUN	Food Service	FSOT	No	
Institutional Specialists/Tutor	INSP	Lecturer	INST	Health/Student Services	HLTH	NBCT	
Literatur/Media Specialist	LIBR	Professor	LECT	Library Assistant/Technician	LIAS	Yes	
Nurse	LNRS	Profess	PROF	Mechanic/Repairer	MECH	No	
Occupational Therapist	LIBR	ROTC	ROTC	Printing Services	PRNT	National Board Certified Teacher?	
Physical Therapist	OCCT	Other	OTHR	Security	SEST	Yes	
Psychologist	PSYC	*Directly hires, evaluates, transfers, disciplines or dismisses.		Special Education Assistant	SEDA	No	
Reading Specialist	READ			Teacher Aide/Paraprofessor	TIPA		
ROTC	ROTC			Other	OTHR		
Intervention Specialist/Special Education	SDSP						
Speech/Hearing	SHTH						
Other	OTHR						

AFFILIATED DEPARTMENTS ANNUAL DUES (Requires OEA membership if eligible)		
Code	Fund ID	Dues
OAESPP	F24	\$5.00
OASNSP	F01	\$10.00
ASSOCIATE ORGANIZATIONS ANNUAL DUES		
OAEA	F02	\$50.00
OSCA	F04	\$60.00
OCTELA	F06	\$40.00
OAHPERD	F07	\$50.00
OTEEA	F08	\$35.00
OCTM	F09	\$25.00
DLAMC	F10	\$15.00
OFLA	F11	\$55.00
SECO	F13	\$30.00
OCSA	F14	\$30.00
OEA Women's Caucus	F16	\$15.00
OMLA	F23	\$30.00
GLBTC	F25	\$10.00
OASCD	F26	\$30.00
OELMA	F27	\$65.00
OEA Hispanic Caucus	F29	\$10.00

PK-12		PRIMARY SUBJECT TAUGHT		EDUCATIONAL SUPPORT (ESP)	
Adult Education	ADED	Agriculture	AGRI	Not Applicable	
Agric & Natrl Resources	AGNR	Architecture	ARCH		
Arts	ARTS	Arts	ARTS		
Basic Education	BEDC	Basic Skills/Remedial Education	BSRE		
Career and Technical Education	INAR	Business	BUSN		
Civics/Govern/Pol/Sci	CGPS	Communications	COMM		
Computer & Info Science	CICS	Computer and Info Sciences	EDUC		
Early Childhood	ECDE	Engineering	ENGR		
Elementary Curriculum	ELED	English and Literature	ENLL		
English as a Second Lang	ENSL	Foreign Language	FLLI		
English/Language Arts	ELAR	Geography	GEOG		
Family and Consumer Science	FCSC	History	HIST		
Foreign Language	FLLI	Home Economics	HOME		
Geography	GEOG	Industrial Arts	INAR		
Health	HLED	Journalism	JOUR		
History	HIST	Marketing	MARK		
Mathematics	MATH	Mathematics	MATH		
Middle School Curriculum	GMDC	Medical Science	MEDS		
Music	MUSI	Political Science	POLS		
Physical Education	PHED	Psychology	PSYC		
Psychology	PSYC	ROTC	ROTC		
Reading	READ	Science	PHSC		
Social Studies	SSSS	Social Sciences	SOSC		
Special Education	SDED	Special Education	VOCT		
Hearing Impaired	SHIM	Vocational Training	VOCT		
Visually Impaired	VIM	None	NONE		
Vocational & Technical Education	VTED	Other	OTHR		
None	NONE				
Other	OTHR				

Continuous Membership Roster:

The Continuous Membership Roster is a listing of all members on record for your local who have chosen to have their dues deductions continue from year to year without the need for a renewal form.

You will be sent the Continuous Membership Roster prior to the start of the membership year. This listing should be reviewed and updated with any changes necessary and returned to OEA in the envelope provided.

Continuous Membership Roster Guidelines:

- Make all changes on the Continuous Membership Roster. Do not have anyone that is on the Continuous Membership Roster complete an enrollment form unless they change their pay method.
- If a continuous member is not on this roster and does not have a printed renewal form, an Enrollment Form must be completed and returned to OEA.
- Check the total amounts on the continuous roster. Review area codes for non-work phone numbers and add non-work e-mail addresses.
- After making corrections on the Continuous Membership Roster, make two copies. The local is to keep one copy and give the other copy to the employer/board treasurer for payroll deductions. Return the original Continuous Membership Roster to OEA Membership in the envelope provided.
- Continuous members do not need to initial the Continuous Membership Roster. The individual membership information can be verified by a local association representative.

Continuous Membership Roster Information

Continuing payroll deduction membership can be defined as “the process which allows an individual to authorize continuing payroll deduction from year to year without any additional sign up on the part of the member.” The majority of OEA members are continuous and remain loyal to the United Education Profession (UEP). Unnecessary duplication of paperwork for the member, the school district, and the local, state, and national associations can be eliminated with continuing membership.

If your local association is considering continuing payroll deduction membership, it is important that the appropriate OEA Labor Relations Consultant and persons from the OEA Membership Department in Columbus be involved in setting up the procedure for your local association. OEA personnel will be more than happy to work with local association leaders to establish an acceptable continuing payroll deduction membership program for your local. Early involvement of OEA personnel will help eliminate procedural problems that can arise when first converting to continuous payroll deduction membership.

Contact your Labor Relations Consultant if you are interested in establishing a continuing payroll deduction membership procedure for your local.

Continuous Membership Roster Overview



See Example of form

Number on Example Roster	Information Needed	Description/ Explanation
1	Name and Address	Make any corrections to the member's name and address in the space to the right of the printed name and/or under the address.
2	Home Phone (Home, Cell or Non-work)	Complete this information if blank or correct any information that has changed.
3	Non-Work E-Mail Address	Provide an e-mail address which is year round or correct any information that has changed.
4	Social Security Number	Complete this information if blank or make any necessary corrections.
5	Ind ID/Mbr ID	The Individual ID number and the Member ID number are both generated by OEA. The Individual ID does not change and is printed on the membership card. The member ID is only for the current year membership and will change every year.
6	OEA/NEA/LEA/District Codes	These codes represent the dues associated with the membership type assigned to the individual for their NEA, OEA, local and district membership enrollment.
7	OEA/NEA/LEA/District Dues	These amounts represent the dues associated with the membership type assigned to the individual for their NEA, OEA, local and district membership enrollment.
8	Total	This total represents the total annual dues based on the assigned membership types. Any correction/ addition to the membership dues will necessitate a change in the total dues amount.
9	Contin	Indicates whether the member has elected to be a continuous member. All individuals should have a "Y" in this space.
10	Ethnic	Identifies the ethnicity assigned to the member in our database.

Number on Example Roster	Information Needed	Description/ Explanation
11	Gender	Identifies the chosen gender of the member in our database. (optional)
12	Voter	Indicates whether the member is a registered voter. (optional)
13	M. Tchr	"Master Teacher" "Yes" means the member has a Master Teacher designation, "No" means they do not.
14	NBCT	"National Board Certified Teacher" "Yes" means the member has an NBCT, "No" means they do not.
15	LPDC	"Local Professional Development Committee" member. "Yes" means the member is an LPDC member, "No" means they are not.
16	Local	The name of the local association.
17	County	The Ohio County in which the employer is located.
18	Employer	The name of the member's employer (school district).
19	Work Loc	The name of the primary school building where the member works. Only one work location per member can be entered in the database.
20	Position	Fill in this information if blank or correct any information that has changed. The four letter codes for the member's current position can be found on the back of the renewal and enrollment forms and are specific to PK-12, Higher Education, and Education Support Professionals. <i>Please note: there is space for only one position within our system. Please indicate the primary position of the member.</i>
21	Primary Subject Taught	Complete this information if blank or correct any information that has changed. The four letter codes for these can be found on the back of the renewal and enrollment forms and are specific to PK-12 and Higher Education. All education support professional members should not have anything printed here. <i>Please note: there is space for only one position within our system. Please indicate the primary position of the member.</i>

Example Continuous Membership Roster

Page No : 2
Data As Of : 05/16/2011

OHIO EDUCATION ASSOCIATION
CONTINUOUS MEMBERSHIP ROSTER
BY LOCAL/CHAPTER/EMPLOYER/WORK LOCATION/NAME
MEMBERSHIP YEAR 11-12

Report Name : MSRS1204
Run Date : 05/16/2011 11:35:45

1 SMITHSONIAN, MARY L
91 BUTTERNET AVE
WESTERVILLE OH 43081-1405
Home Ph: (216) 555-1011
E-Mail :
SN : XXX-XX-5555 (2)
Ind Id : 0002830324(1) Mbr Id : 10221751(1) 2 3 4 5
6 NEA AC-1-100
OEA AC-1-100
LEA AC-1-100
7 NEA Dues
OEA Dues
LEA Dues
District Dues
OAEA
9 Contin : Y
10 Ethnic : 05
11 Gender : F
16 Local : X Y Z EA - 12345687
17 County : ANY
18 Employer : X Y Z LOCAL SD
19 Work Loc : Main St. Elem.
Position : Classroom Teacher - CLTR 20
Subject : History - HIST 21

8 Total : 829.50
WILLIAMS, DAVE R
23 OAK ST, APT 3A
ANYTOWN OH 45660-3414
Home Ph: (216) 555-1022
E-Mail :
SN : XXX-XX-2222 (7)
Ind Id : 0005678914(4) Mbr Id : 10624985 (9)
99.00 PR
314.00 PR
20.00 PR
18.00 PR
NEA Dues
OEA Dues
LEA Dues
District Dues
106.50 PR
314.00 PR
20.00 PR
18.00 PR
Contain : Y
Ethnic : 01
Gender : M
Voter : Y
NBCT : No
LPDC : No
Position : Maintenance - CUST
Subject :

WILSON, SUSAN D
2439 MAIN ST
GEORGETOWN OH 43081-3438
Home Ph: (216) 555-1033
E-Mail :
SN : XXX-XX-4444 (4)
Ind Id : 0003487556(7) Mbr Id : 10266877 (2)
99.00 PR
343.00 PR
20.00 PR
19.00 PR
NEA Dues
OEA Dues
LEA Dues
District Dues
99.00 PR
343.00 PR
20.00 PR
19.00 PR
Contain : Y
Ethnic : 04
Gender : F
Voter : Y
NBCT : No
LPDC : No
Position : Classroom Teacher - CLTR
Subject : Math - MATH

WOODS, GEORGE P
562 WILSON AVE
KEYSTONE OH 44839-9648
Home Ph: (216) 555-1044
E-Mail :
SN : XXX-XX-4444 (7)
Ind Id : 0003487556(8) Mbr Id : 10266877 (5)
0.00 PR
555.00 PR
20.00 PR
31.50 PR
NEA Dues
OEA Dues
LEA Dues
District Dues
0.00 PR
555.00 PR
20.00 PR
31.50 PR
Contain : Y
Ethnic : 03
Gender : M
Voter : Y
NBCT : Yes
LPDC : No
Position : Classroom Teacher - CLTR
Subject : General Subjects - GSUB

ZERCONS, THOMAS T
RURAL ROUTE 3
SOMEWHERE OH 45450-1045
Home Ph: (216) 731-5684
E-Mail :
SN : XXX-XX-5555 (4)
Ind Id : 0002333457(2) Mbr Id : 10885441 (5)
63.50 PR
212.00 PR
20.00 PR
11.50 PR
NEA Dues
OEA Dues
LEA Dues
District Dues
63.50 PR
212.00 PR
20.00 PR
11.50 PR
Contain : Y
Ethnic : 02
Gender : M
Voter : N
NBCT : No
LPDC : No
Position : Secretarial - SEST
Subject :

A local association representative is responsible for verifying the membership information and reading the language at the front of the report.

Making Corrections to the Continuous Membership Roster

An example of a continuous membership roster with typical corrections which would be sent back to OEA is included on the following page. The numbers below correspond with the circled numbers on the example continuous membership roster.

Clearly mark corrections to the continuous membership roster according to these directions so that the changes can be processed correctly.

Before distribution to the Membership Collector/Chairperson, the Local Treasurer or the local association representative should check the dues amounts. This is the amount to report to the employer payroll department. It is the responsibility of the local association to make sure the correct dues amounts are collected.

1. Correct name or address if the printed information is not correct.
2. Correct building assignments by writing the new building number (or the building name). Do not cross out a member's name and write them on another page to change building assignments. This will result in their cancellation.
3. Cross out any members who discontinue membership. Give the reason for the change under the address.
- 4. Do not cancel members on official leave of absence (LOA). Members on LOA for one half or more of the school year and are not paid their full-time salary shall pay one half of the annual UEP dues for their appropriate membership type. Refer to "Leave of Absence (LOA) Membership Reporting Guidelines."**
5. This shows a NEA life member that has fully paid their NEA dues. (OEA and NEA life memberships are no longer available and were stopped in the early 1970's.) This information is indicated as a membership type of AC-7-100 and 0.00 dues to collect. These members must pay any other association dues for which they do not hold a life membership.
6. If a member wishes to join any affiliated department and/or associate organizations, write in the organization's code (the codes are available on the back of the renewal and enrollment forms) and dues. Please note that if a member joined any associate organizations the previous year, the number and dues amount is already indicated on the continuing membership roster. If the member does not wish to continue their membership in the affiliate organization, simply cross out the dues for that organization. **Make sure the correct amount is added to the Total amount.**
7. Indicate a membership type change under the type list, i.e., half time to full time, full time to half time, etc. Change the "Total:" amount to reflect this change. Do not fill out an enrollment form for a type change.

ONCE CORRECTIONS ARE COMPLETED, MAKE TWO COPIES OF THE ORIGINAL CONTINUOUS MEMBERSHIP ROSTER. THE LOCAL ASSOCIATION SHOULD KEEP ONE COPY AND GIVE ONE COPY TO THE EMPLOYER PAYROLL DEPARTMENT. RETURN THE ORIGINAL AS SOON AS POSSIBLE, BUT POSTMARKED NO LATER THAN OCTOBER 15 TO THE OEA MEMBERSHIP DEPARTMENT.

Example Continuous Membership Roster—with Corrections

Page No : 2
Data As Of : 05/16/

OHIO EDUCATION ASSOCIATION
CONTINUOUS MEMBERSHIP ROSTER
BY LOCAL/CHAPTER/EMPLOYER/WORK LOCATION/NAME
MEMBERSHIP YEAR 11-12

Report Name : MSRS1204
Date : 05/16/2011 11:35:45

MEMBER NAME	LOCAL/CHAPTER/EMPLOYER/WORK LOCATION/NAME	MEMBERSHIP YEAR	Local	County	Employer	Work Loc	Position	Subject
THOMPSON, MARY L	Johnson		X Y Z EA - 12345687	ANY	X Y Z LOCAL SD	Math-8th-Elem	Classroom Teacher - CLTR	HIST
TERVILLE OH 43081-1405	342 E. Main							
Phone: (216)555-1011								
Id: XXX-XX-5555 (2)								
Id: 0002830424(1) Mbr Id: 10221751(1)								
THOMAS, DAVE R	Retired							
OAK ST								
TOWN OH 45660-3414								
Phone: (216)555-1022								
Id: XXX-XX-2222 (7)								
Id: 0005678914(4) Mbr Id: 10624985(9)								
SON, SUSAN D								
9 MAIN ST								
REGSTOWN OH 43081-3438								
Phone: (216)555-1033								
Id: XXX-XX-4444 (4)								
Id: 0003487556(7) Mbr Id: 10266877(2)								
DS, GEORGE P								
WILSON AVE								
STONE OH 44839-9648								
Phone: (216)555-1044								
Id: XXX-XX-4444 (7)								
Id: 0003487556(8) Mbr Id: 10266877(5)								
CONS, THOMAS T								
JAL ROUTE 3								
LEWIS OH 45450-1045								
Phone: (216)731-5684								
Id: XXX-XX-5555 (4)								
Id: 0002333457(2) Mbr Id: 10885441(5)								

Local association representative is responsible for verifying the membership information and reading the language at the front of the report.

Dues Transmittal Forms and Billing Statement



See Example of form

Your local association has a written contract with OEA pertaining to the transmitting of dues. An example of this contract is included for review of contents. The Dues Transmittal Contract requires a schedule of payments to be established. Based on this language you will be sent a "Dues Transmittal Agreement" which requests the required information to establish the dues transmittal schedule. This schedule will be used, along with your local's annual dues obligation amount, to calculate the amount due the association each month in order to meet that obligation. This information directly impacts the amounts reflected on your monthly billing statement.

The Bylaws of the Ohio Education Association, reflecting the will of the membership as expressed by the delegates to the various Representative Assemblies, states the following in regard to Dues Transmittal and Enforcement Procedures:

- a. The Ohio Education Association shall enter into written contracts with affiliates governing the transmittal of dues.
- b. Affiliated District Association dues shall be collected by the Ohio Education Association and refunded to the District Association.
- c. An affiliate which becomes delinquent in its contracted transmittal schedule by more than thirty (30) days shall be assessed a penalty of one (1) percent per month on the overdue balance.**
- d. Thirty (30) days prior to the Spring and Fall Representative Assembly, adjustments directly proportionate to the dues transmittal shall be made in the number of delegates to the Representative Assembly for failure to meet the provisions of contracted transmittal schedules.

Consistent with the above, the OEA has developed a Dues Transmittal Contract, which appears on the following two pages. Previously signed contracts and schedules for your local are on file at OEA.

Annually, OEA sends a "Dues Transmittal Agreement" form to the local association treasurer stating the current information contained in your "Dues Transmittal Contract." Any changes for the current membership year are to be returned to OEA postmarked on or before September 30th.

If OEA has not received a "Dues Transmittal Contract" and/or a reply to the "Dues Transmittal Agreement", your local association's current transmittal payment schedule will be the same for the future membership year.

All dues monies, whether from cash payments, payroll deduction or other methods of payment, should be transmitted to the OEA by the statement due date.

Your local 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.

Example Dues Transmittal Contract (front)

NOTE: Following is a copy of the actual language included in Dues Transmittal Contracts. These contracts are on file at OEA Headquarters. There is no need for you to complete a new contract unless you receive notice from the OEA Membership Department that your Dues Transmittal Contract is not on file or is in some way incomplete.

Dues Transmittal Contract

Directions: Please complete two copies, then sign both and return them to the Ohio Education Association Membership Department along with your schedule of payments. OEA will sign and return one copy to you.

In accordance with Section 2-5a of the Bylaws of the Ohio Education Association, "The Ohio Education Association shall enter into written contracts with affiliates governing the transmittal of dues." Similar requirements adopted by the National Education Association and Executive Committee Policy 210.03, the Ohio Education Association enters into this contract with _____ (hereinafter referred to as the affiliated local association) relative to the collection and transmittal of membership applications and dues monies for the several classifications of professional membership.

1. The Ohio Education Association, in accordance with its written contract with the National Education Association, and agreements with the respective District Associations affiliated with the Ohio Education Association, shall be the established agency for the transmittal of membership dues and the processing of memberships for the Ohio Education Association, the National Education Association and the District Associations, which are the Capital, Central, ECOEA, EOEAE, NCOEA, NEOEA, NWOEA, SEOEA, SWOEA, and the WOEAE.
2. The Ohio Education Association agrees to receive applications for membership in the entities named in (1) above and to promptly transmit, in accordance with written agreements already in effect, monies received from the affiliated local association for memberships in the above named associations. In addition, the Ohio Education Association agrees to process memberships and transmit monies for departments, affiliates and associated organizations of the Ohio Education Association which annually agree that the Ohio Education Association will solicit memberships on their behalf and handle and transmit monies received for such memberships in such departments, affiliates and associated organizations in accordance with established and mutually acceptable procedures.
3. The affiliated local Association agrees to use the enrollment forms prepared by the Ohio Education Association, with the approval of the National Education Association and other entities for whom memberships are processed, in order that the constitutional provisions of the National Education Association and the Ohio Education Association can be satisfied and the information necessary for the governance of these associations and the proper handling of memberships and membership dues can be accomplished.
4. The affiliated local Association agrees to transmit monies received by cash, check, money order, or other non-deferred method of payment of membership dues to the Ohio Education Association within thirty (30) days of receipt of same from members. The affiliated local association also agrees that it will transmit, within thirty (30) days of their receipt, all monies received from boards of education, credit unions, or other agencies involved in the deduction of dues from payroll, credit union savings, or other procedures adopted by the local Association for deferred payment of dues by members. A schedule of payments, in accordance with local established procedures, is appended to, and when accepted by the Ohio Education Association, shall become part of this Agreement. The affiliated local Association agrees to pay one percent (1%) interest per month on any fraction thereof on any payments which are delinquent or delayed. The dues transmittal required by this contract shall be paid by the treasurer of the affiliated local Association according to the schedule appended hereto and the failure of the governing body of the affiliated local association to authorize payment when otherwise due by this contract shall not excuse the affiliated local association from the interest charge provided herein.

Example Dues Transmittal Contract (back)

This Agreement with the Schedule appended hereto is entered into as of _____ and is effective for the fiscal year of the Ohio Education Association beginning September 1 and shall continue from year to year thereafter as shall the schedule of payments appended hereto unless either or both is amended or modified in writing by the Ohio Education Association and the affiliated local association.

Executive Director, OEA

(Date)

President, Local Education Association

(Date)

EXAMPLE

Example Dues Transmittal Agreement



Due Date Information can be found in the Quick Reference Section.



OHIO EDUCATION ASSOCIATION
2023-2024 Dues Transmittal Agreement
 Deadline for submission to OEA is September 30, 2023



March 29, 2023

LOCAL EA - 12345678

0005

Local Treasurer
 123 Street Address
 Ohio City, OH 43215

In order to comply with Section 2-5a of the Bylaws of the Ohio Education Association, "The Ohio Education Association shall enter into written contracts with affiliates governing the transmittal of dues," this form must be completed on an annual basis. The information provided below will establish the transmittal schedule and determine the monthly billing percentage of collected dues to be paid to OEA.

Dues deduction information specific to your local association can be found in the local's Bargaining Unit Contract.

Members:	Prior Year -- 2022 - 2023 (For Informational Purposes)	2023-2024 Membership Year * (Enter # of deductions and dates)
Number of payroll deductions scheduled per membership year:	10 Deductions	
Date of first dues deduction:	October 15	
Date of last dues deduction:	July 15	

***If nothing is indicated above, the prior year billing schedule will continue for the current membership year.**

Indicate how dues payroll deductions are transmitted to your local. Check Electronically Employer to OEA
 (check one)

NOTICE: An affiliate which becomes delinquent in its contracted transmittal schedule by more than thirty (30) days shall be assessed a penalty of one (1) percent per month on the overdue balance per Section 2-5c of the Ohio Education Association Bylaws.

Upon receipt of your first dues deduction from the school district, please provide (via email or US Mail) a copy of the accompanying payroll deduction listing which reflects the dues deducted with members' names.

Delinquent or slow payments may require OEA to conduct a financial audit of your local association's records.

Name (Printed): _____ Signature: _____

Title: _____ Date: _____ Non-work e-mail: _____

This letter must be completed, postmarked, and returned to the OEA Membership Department, 225 East Broad St., Box 2550, Columbus, Ohio 43216 **no later than September 30, 2023**. For additional information on Local Association Dues Transmittal Contracts, refer to your **2023-2024** Treasurer's Handbook Chapter 1, Section III. If you need assistance, please contact infoEA by email: membership@ohea.org or by telephone: (844) 632-4636.

rev. 02/23



This form is a criterion for the OEA Treasurer's Award.

Nov-Aug
 0000015225

Billing Statement:

A monthly billing statement from OEA is available online at <https://ims.nea.org/ebilling/>. The billing statement is based on information provided within the dues transmittal agreement.

The billing statement reflects the annual dues obligation owed based on the membership totals on record and the corresponding dues of the membership types confirmed by the local.

The Local Association will be billed for cash payers at 100% and monies from members collected by payroll deductions are billed in accordance with the Dues Transmittal Agreement. It is important for the Treasurer to consistently monitor and reconcile the billing statement utilizing the information from membership records from the employer and dues transmittal agreement.

In an effort to enhance efficiency while reducing mailing and production time, OEA provides the monthly billing statement in an electronic format via an online portal offered via NEA. This allows the Treasurer immediate access to this important information and provides enhanced access to membership data to allow more timely record updates and reconciliations. With the electronic billing statement, you have monthly access to your Membership Roster.

Below we have provided an overview of how to access the portal and samples of what can be viewed within the portal.

The OEA eBilling Portal- <https://ims.nea.org/ebilling/>

If you haven't setup your account, select "Forgot Password" and enter the email address OEA has on record for you. You will be sent an email from NEA with a temporary password to use to log in. Use the temporary password and the email address OEA has on file as the Username to log in. Once logged in, you will be required to change the password.

nea NATIONAL EDUCATION ASSOCIATION

Sign in to access secure content.

Username

Password

SUBMIT →

[Forgot Password?](#)

[Privacy Policy](#) [Terms of Use](#)

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Once you have successfully changed the password and are logged in, the eBilling homepage displays. Here you have access to view and download both current and prior year billing information.

The current membership year billing documents display first, in the blue section, and the prior year billing documents follow in the beige. The current month's billing documents display first by default. Use the drop-down box to select and view prior month's billing documents.

Click on the Download icons to view various reports showing the billing and membership status as of the month end close. Available reports include the current Member Dues Roster, in both excel and pdf formats; Membership Dues Change Roster, reflecting membership updates made during the month; Year to Date Obligation Summary and Year to Date Payment Transactions.

The screenshot displays the NEA eBilling interface. At the top left is the NEA logo (National Education Association). To the right, it says "Welcome MARY TESTER" and "Last Login Dt:". Below this is a navigation menu with links: Statements, EFT Account Setup, YTDSummary, Transmittal Schedule, Change Password, and Logout.

The main content area is divided into two sections:

- Membership Year : 2022-2023** (Blue header)
 - Current Year Statement Period: 04/01/2023-04/28/2023 [8] (dropdown menu)
 - Invoice # 8921248
 - Table with columns: Invoice File, Download
 - Items listed: Billing Statement, Member Dues Roster (excel), Full Member Roster with Dues (pdf), Membership Dues Change Roster (pdf), YTD Obligation Summary (pdf), YTD Payment Transactions (pdf). Each item has a download icon.
 - Button: PAY CURRENT YEAR DUES
- Membership Year : 2021-2022** (Green header)
 - Prior Year Statement Period: 04/01/2023-04/28/2023 [20] (dropdown menu)
 - Invoice # 8915381
 - Table with columns: Invoice File, Download
 - Item listed: Billing Statement with a download icon.

Example Billing Statement

Below is a sample of the first page of the new eBilling statement. The top section of the bill should be removed and mailed with the local's payment. If you are unable to print the bill, please ensure the payment sent to OEA includes the local name and 4-digit Billable Party ID on the check.

OEA OHIO EDUCATION ASSOCIATION		Ohio Education Association		Invoice # 7863009	
Please make checks payable to: Ohio Education Association		Membership Year :	2019 - 2020		
MAIL REMITTANCE, AND THIS SECTION TO:		Statement Period :	02/29/2020 - 03/31/2020		
Ohio Education Association 225 East Broad St Columbus, OH 43215		Payment Due By :	04/29/2020		
		Current Amount Due :	\$18,056.00		
		Total Remitted :	_____		
<hr/>					
Dues Obligation			Payment Received		
Dues Obligation as of 02/29/2020			Payments Received as of 02/29/2020	\$72,978.00	
Dues Obligation as of 03/31/2020	\$181,314.00		Current Month Payments	\$18,056.00	
Current Period Net Change	\$0.00		YTD Adjustments(Credits Applied)	\$0.00	
Aged Balance			Total Payments		
1-30 Days	31-60 Days	61-90 Days	Over 90 Days	\$91,034.00	
\$0.00	\$0.00	\$0.00	\$0.00		
Penalty Assessment			Summary		
YTD Penalty Amount	\$0.00		*YTD Dues Billed	\$109,090.00	
YTD Penalty Adjustment	\$0.00		Payroll (60.0%)	\$108,336.00	
YTD Penalty Payment	(\$0.00)		Cash (100.0%)	\$754.00	
Total	\$0.00		YTD Payments Received	(\$91,034.00)	
			YTD Adjustments(Credits)	\$0.00	
			Penalty Balance	\$0.00	
			Amount Due	\$18,056.00	
			<i>*YTD dues billed is calculated based on YTD obligation as of 03/31/2020</i>		
Additional treasurer resources can be found at www.ohea.org/ohea-secretary-treasurer-member-resources/					

As always, we are here to help. If you have any issues accessing the eBilling portal, the billing reports, or if you have questions regarding your billing reports, please contact us. You can reach us at membership@ohea.org or INFOEA at 1-844-632-4636 Monday – Friday 8:30 AM to 5:00 PM.

E-Pay New for 2023-2024 Membership Year **NO MORE CHECK WRITING!!!**

The electronic payment (ePay) option is available via the eBilling Portal! It is a very easy, efficient, and secure process - you no longer need to write and mail a paper check.

- Once logged in to the eBilling Portal, click on the "EFT Account Setup" to enter your local's bank account information and click save. (The information will be saved going forward)

The screenshot shows the NEA National Education Association eBilling Portal. The user is logged in as MARY TESTER. The navigation menu includes Statements, EFT Account Setup, YTD Summary, Transmittal Schedule, Change Password, and Logout. The main content area is titled "Setup EFT Account Profile & Auto Pay" and contains a form with the following fields: Routing #, Bank Name, Account #, and Confirm Account #. A "SAVE" button is located below the form. A large "EXAMPLE" watermark is overlaid on the page.

- Click on "Statements" and then the "Pay Current Year Dues" button in the current year section, or the "Pay Prior Year Balance" button in the prior year section. If the "Pay" button is visible, an amount is due for that membership year and should be paid using the button.

The screenshot shows the NEA National Education Association eBilling Portal. The user is logged in as MARY TESTER. The navigation menu includes Statements, EFT Account Setup, YTD Summary, Transmittal Schedule, Change Password, and Logout. The main content area is titled "Membership Year : 2022-2023" and shows the "Current Year Statement Period" as "04/01/2023-04/28/2023 [8]" and "Invoice # 8921248". Below this, there is a table with columns "Invoice File" and "Download". The table lists the following files: Billing Statement, Member Dues Roster (excel), Full Member Roster with Dues (pdf), Membership Dues Change Roster (pdf), YTD Obligation Summary (pdf), and YTD Payment Transactions (pdf). A "PAY CURRENT YEAR DUES" button is located at the bottom of the page. A large "EXAMPLE" watermark is overlaid on the page.

- You have two options:
 - “Pay Billed Amount” - This is the amount due based on your dues transmittal agreement. This is the system default option.
 - “Pay This Amount” - Allows you to pay some other amount of your choice.

nea NATIONAL EDUCATION ASSOCIATION
 Welcome MARY TESTER
 Last Login Dt:

[Statements](#) [EFT Account Setup](#) [YTDSummary](#) [Transmittal Schedule](#) [Change Password](#) [Logout](#)

Pay Statement Balance

Billable Party :	Invoice Number :	8921248
Membership Year :	2023	Billed Amount : \$16,092.73
Payment Received :	\$0.00	Payment Due Date: 05/30/2023

Pay Billed Amount Pay This Amount

Dues Amount \$16,092.73

I hereby authorize the Ohio Education Association to initiate an electronic transfer of funds from the billable party [REDACTED]. These funds are being transmitted in accordance with NEA's bylaws. The billable party [REDACTED] understands that because these are electronic transactions, these funds may be withdrawn from its account within one business day as soon as the transaction is authorized, and that it will have limited time to report and dispute errors. If this transaction is rejected, billable party [REDACTED] understands that the Ohio Education Association may at its discretion attempt to process the charge again within 30 days. The billable party [REDACTED] further acknowledges and agrees to be bound by the NACHA Operating Rules governing electronic fund transfers.

I understand that checking this box constitutes a legal digital signature confirming my understanding and agreement to the above. **PAY**

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- Click on the box in front of “I understand that checking this box constitutes a legal digital signature confirming my understanding and agreement to the above.” The “Pay” button becomes active after clicking that box.
- Click “Pay” to submit the payment.

nea NATIONAL EDUCATION ASSOCIATION
 Welcome MARY TESTER
 Last Login Dt:

[Statements](#) [EFT Account Setup](#) [YTDSummary](#) [Transmittal Schedule](#) [Change Password](#) [Logout](#)

Pay Statement Balance

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I understand that checking this box constitutes a legal digital signature confirming my understanding and agreement to the above. **PAY**

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- Once the payment is submitted, you should see a message stating your payment was successful and it will be listed as pending.

Reconciliation of Local Association Members

Periodic reconciliations of the local association's members to the list of members that OEA has on record is important for the following reasons:

- To ensure all members are on record with OEA for the purpose of maintaining the applicable OEA and NEA benefits and services.
- To ensure full dues for all members are collected and to avoid loss of income to the Local Association, District, OEA, or the NEA.
- To verify that all payroll deductions for dues are collected accurately and in a timely manner by the employer payroll department and to prevent members from over or under paying dues which could result in unnecessary expenditure of resources, member concerns, or loss of income.
- To prevent the possibilities of incurring late penalty payments and potential delegate seating issues at the OEA and NEA Representative Assemblies.

Reconciliation Tips

The overall purpose of these 11 tips is for the local treasurer to maintain accurate member records, ensure proper payroll deductions are being withheld by the employer payroll department, and that the payment of dues to OEA are made according to OEA policy, your local's transmittal schedule, and Ohio laws.

1. Submit all local association initial enrollment materials to OEA in accordance with the timelines set forth in this handbook.
2. Review your local's transmittal agreement to ensure it is in-line with your bargaining unit contract's payroll deduction language.
3. Provide the employer payroll department with timely enrollment materials for all members paying dues through payroll deductions.
4. Collect full dues from cash payers at the point of enrollment and forward payment to OEA within 30 days of receipt.
5. Review the employer payroll deduction list for each pay period to verify all member deductions are being accurately withheld. **Payroll deduction lists should accompany each dues payment received from the employer payroll department.** Each list should contain the following information: name of member, a member's ID number (or last 4 digits of the social security number) and dues deduction amount. Contact your employer payroll department if you are not receiving this list.
6. Local Association dues paid by a check from the employer must have a payroll deduction list for each pay period accompany the payment to OEA. Work with your employer payroll department to ensure OEA and your local receives these lists.
7. Forward all member changes and cancellations **as they occur** to OEA on a current year Membership Update Form. A copy of this form is available online at www.ohea.org, Resources, Office of the Secretary Treasurer, Documents. Review the OEA monthly billing statement to ensure the changes are completed.

8. Submit member additions, changes and cancellations to the employer payroll department in a timely manner. Review the payroll deduction list to ensure that payroll deduction amounts have been updated.
9. **At least twice a year** compare the OEA member roster to the local association's member records.
10. If needed, contact your Labor Relations Consultant for assistance with working with the employer.
11. Keep the line of communication open between you and the employer's payroll department to maintain accurate payroll deduction records for all eligible members in your local.


OEA Enrollment Summary/Potential Count Form

This form is to summarize the actual number of active members in your local verses the total number of employee positions which are in your defined bargaining unit and eligible for membership. OEA will use the information on this form at the beginning of the membership year to verify the local association's membership counts once processing has been completed.

Example OEA Enrollment Summary/Potential Count Form




Due Date Information can be found in the Quick Reference Section.



OEA
OHIO EDUCATION ASSOCIATION

2023-2024
ENROLLMENT SUMMARY/ POTENTIAL COUNT FORM



nea NATIONAL
EDUCATION
ASSOCIATION
Great Public Schools for Every Student

12345678 - LOCAL EA (0005)

Work Location/Building Name (For Local Association use only) _____

The OEA Enrollment Summary/Potential Count form is used to reconcile the number of members that are reflected in the forms (New Enrollments, Renewals, Continuous Roster) that are sent to us. **It is not necessary to send an enrollment summary form for every building, instead, consolidate the information and send one form for the local.**

Number of Members _____

Number of Educators Who are Members (AC-1-100, AC-1-50, AC-1-25): _____

Number of Educational Support Professionals Who are Members (AC-2-100, AC-2-50, AC-2-25): _____

TOTAL Number of Members for this Local: _____

Cash/Check Payment _____

Number of Members Who Pay by Check _____ **Check Amount** _____ **Local Association Check Number** _____

Payment for cash payers is due upon enrollment. Deposit the member's check into the Local's bank account and send one Local Association check for all cash payers to OEA. Send only OEA, NEA, UniServ, District dues, do not include local dues. Any local dues sent to OEA will be applied as a payment to the local's account.

Potential Membership Count _____

Total number of employee positions which are in your defined bargained unit and eligible for membership: _____

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.**

Mailing Information _____

Use the enclosed return envelope to send this form together with the continuous roster to OEA Membership Department, 225 East Broad St, Box 2550, Columbus Ohio 43216. Return the materials as soon as possible, but **the postmark must be on or before October 15.**


Completed by: _____ Signature: _____

Title: _____ Date: _____ Non-work email: _____

When OEA has completed the processing of the local's forms, an electronic roster will be sent. Please Note: The roster will be sent to the treasurer on record.

If you need assistance, please contact infoOEA by email: membership@ohea.org or by telephone: (844) 632-4636.


Rev. 02/23
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Local Association Reporting Form

Each year in March you will be sent a Local Association Reporting Form. This form requires updates to information on file at OEA which will be used to prepare forms and documents for the upcoming membership year and will be reflected on those items you will receive within the Annual Membership Enrollment mailing.

Example Local Association Reporting Form

<p style="text-align: center;">«LEA_ID» OEA <small>OHIO EDUCATION ASSOCIATION</small></p>	<p>OHIO EDUCATION ASSOCIATION Local Association 2023-2024 Reporting Form</p>	 <p style="font-size: 8px; margin: 0;">NATIONAL EDUCATION ASSOCIATION Great Public Schools for Every Student</p>																								
<p>The information required on this form is critical for the printing of your local's 2023-2024 membership materials.</p> <p>Please return the completed form no later than April 1, 2023. If not returned by this date, OEA will utilize prior year information. Include it in the billing envelope or mail to: Ohio Education Association Membership Department, 225 E. Broad St., Columbus, OH 43216. This form may be scanned and emailed to membership@ohea.org, Subject: Local Association Reporting Form.</p>																										
<p>Test Local EA - 12345678</p>		<p>Billable Party: 0000</p>																								
<p>Local Dues Information: This is the portion of dues which remains with the local association as determined by the Local's Constitution and Bylaws. Please enter the 2023-2024 local dues amounts for each membership type or "n/c" for No Change. Please provide dollar amount not member type counts.</p> <table border="0" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;"><u>Membership Type</u></th> <th style="text-align: center;"><u>Local Dues On Record</u></th> <th style="text-align: center;"><u>2023-2024 Local Dues</u></th> </tr> </thead> <tbody> <tr> <td>Educator Full Time (AC-1-100)</td> <td style="text-align: center;">\$0.00</td> <td style="text-align: center;">\$ _____</td> </tr> <tr> <td>Educator Half Time (AC-1-50)</td> <td style="text-align: center;">\$0.00</td> <td style="text-align: center;">\$ _____</td> </tr> <tr> <td>Educator Quarter Time (AC-1-25)</td> <td style="text-align: center;">\$0.00</td> <td style="text-align: center;">\$ _____</td> </tr> <tr> <td>Support Personnel Full Time (AC-2-100)</td> <td style="text-align: center;">\$0.00</td> <td style="text-align: center;">\$ _____</td> </tr> <tr> <td>Support Personnel Half Time (AC-2-50)</td> <td style="text-align: center;">\$0.00</td> <td style="text-align: center;">\$ _____</td> </tr> <tr> <td>Support Personnel Quarter Time (AC-2-25)</td> <td style="text-align: center;">\$0.00</td> <td style="text-align: center;">\$ _____</td> </tr> <tr> <td colspan="3" style="padding-top: 10px;"> <p>Does your local association pay the officers' Unified (OEA/NEA/UniServ/District) dues (circle one)? Yes / No</p> </td> </tr> </tbody> </table>			<u>Membership Type</u>	<u>Local Dues On Record</u>	<u>2023-2024 Local Dues</u>	Educator Full Time (AC-1-100)	\$0.00	\$ _____	Educator Half Time (AC-1-50)	\$0.00	\$ _____	Educator Quarter Time (AC-1-25)	\$0.00	\$ _____	Support Personnel Full Time (AC-2-100)	\$0.00	\$ _____	Support Personnel Half Time (AC-2-50)	\$0.00	\$ _____	Support Personnel Quarter Time (AC-2-25)	\$0.00	\$ _____	<p>Does your local association pay the officers' Unified (OEA/NEA/UniServ/District) dues (circle one)? Yes / No</p>		
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<p>Bargaining Contract Information:</p> <table border="0" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 60%;"></th> <th style="text-align: center;"><u>On Record</u></th> <th style="text-align: center;"><u>Enter Changes for 2023-2024 Or "n/c" for No Change</u></th> </tr> </thead> <tbody> <tr> <td>Bargaining Contract Expiration (Mth/Yr):</td> <td style="text-align: center;">6/2023</td> <td style="text-align: center;">_____</td> </tr> <tr> <td>Continuous Memberships (Members do not sign a form each year.):</td> <td style="text-align: center;">Yes</td> <td style="text-align: center;">_____</td> </tr> </tbody> </table>				<u>On Record</u>	<u>Enter Changes for 2023-2024 Or "n/c" for No Change</u>	Bargaining Contract Expiration (Mth/Yr):	6/2023	_____	Continuous Memberships (Members do not sign a form each year.):	Yes	_____															
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<p>Completed by: _____ Date: _____</p> <p>Email: _____ Phone: _____</p> <p>00000000000</p>																										

Membership Update Form

Along with each monthly Billing Statement, the local treasurer will receive a copy of the current year Membership Update Form that is shown on the two following pages. This form is to be used to communicate any membership changes. (It is not to be used for new enrollments.)

Please note: There is no need to send in this form if there are no changes.

Section I—This section is for changes to the individual's membership type. This would include: Member ID Number, current membership period, new membership period and description of membership type change: (i.e. Educator to Education Support Professional, or vice-versa, full time to half time, half time to quarter time, etc.). This form is not to be used for enrolling new members. An enrollment form is required to be completed and signed by new members.

Section II—This section is for changes to individual's personal information. This would include: Name, address, non-work email and non-work phone changes.

Section III Cancellations—In the last column write in the total amount of dues collected from the individual. Do not include local dues. If you are uncertain as to the amount of dues collected for the member being cancelled, call your payroll office. They should be able to give you this information. If the member paid by cash or check, the total amount collected is the total dues for the year. If this information is omitted 100% of the Dues will continue to be billed to the local association.

To help calculate how much of the dues collected was local association dues; review the worksheet example provided on the back, then use the calculation for each individual.

Membership Opt Out Requests After August 31st

It may be possible you will be presented with a membership and/or payroll deduction cancellation request from a current member during the membership year. It is important that you be aware of how those requests are to be handled. The following protocol has been implemented to help coordinate these requests:

- It will be necessary for you as Treasurer to know the specific collective bargaining agreement and the membership enrollment form language and policies regarding membership cancellations that may arise during the membership year.
- If applicable, it may be necessary for you as Treasurer, along with other Local leaders and in consultation with OEA's assigned Labor Relations Consultant (LRC), to ensure that the member is correctly informed about his/her choices related to membership and payroll deductions.
- Should the member wish to cancel their membership, you must immediately send their written request to the OEA Membership Department.
- Additionally, should OEA receive a membership cancellation directly from the member, that request will be forwarded to the OEA Legal Department, at which time you will be notified of the request and the following processes will be followed.
- The Membership Department will document all requests received and forward them to the OEA Legal Department for review.

- During this review, the legal team will review contract language, enrollment information related to the member, any input you as the Treasurer or Local can provide and any other relevant information. This may include any drop language or membership language in the collective bargaining agreement and the individual's specific enrollment agreement form, the dues deduction period, local practices and governance documents, and any known challenges associated with continued deduction of the annual dues responsibility.
- Upon completion of this review, a decision regarding the request for cancellation of payroll deductions will be issued from the OEA Legal Department.
- The member and the local leadership will be notified of the final decision by OEA.
- It is important to point out that cancellation of membership may not necessarily cancel the dues obligation for that membership.
- If applicable, it will be necessary for you as the Treasurer to work with your payroll officer and/or the assigned LRC to coordinate any continuing deductions to meet this obligation. All deductions should continue until a final decision is provided regarding the membership status.
- If the determination is made to cancel the dues obligation, the membership department will reach out to you as the Treasurer to obtain the amount collected in dues prior to the date the OEA legal department has determined is the date to stop dues collections. If any dues were collected beyond this date, the local will need to reimburse the dues collected past the determination date.

Example Membership Update Form (front)

Ohio Education Association

2022-2023
Membership Update Form

Local Association Name: _____ Local User ID: _____ Date: _____
 Preparer: _____ Phone Number: _____ E-Mail Address: _____

This form cannot be used for enrolling new members. An enrollment form is required to be completed and signed by new members.

Section I. Membership Type or Status Updates (i.e., Educator to Education Support Professional, or vice-versa, Full-time to Half-time, Half-time to Quarter-time, etc.).

ID Number	FULL NAME	Effective Dates of		DESCRIPTION
		Current Membership Type	Membership Type	
0009876543	BOBBY SMITH	9/1/20XX	11/30/20XX	Half-time to Full-time Beginning 12-1-20XX (EXAMPLE)

Section II. Member Personal Information Updates (i.e., name, address, non-work e-mail, and non-work phone).

ID Number	FULL NAME	New Personal Information
0006315795	Jane Miller	Change Name & Address to Jane M Wilson, 123 Anywhere St., Some Town, OH 44444 (EXAMPLE)

Return to: **Mail:** OEA Membership Department
 225 East Broad Street
 Columbus, Ohio 43215

Electronic Scan:
Membership@ohca.org

Example Membership Update Form (back)

Local Association Name: _____ Local ID: _____

Section III. Cancellations: Individuals are obligated to pay the full year's dues. Please confirm the collection of the full year's dues by writing the amount collected in Column E below along with the Individual's ID Number, Full Name, Effective Date, and Reason for Cancellation.
 If the individual to be cancelled paid their dues obligation in cash, write "cash" in Column E. The local association is in no way obligated to refund any portion of a cash payment.

Column A	Column B	Column C	Column D	Column E
ID Number	Full Name	Effective Date	Reason for Cancellation	Amount Collected * (Do Not Include Local Dues)

*If the local was unable to collect full dues, utilize the steps below to assist you in calculating the appropriate amount to report in column E for each individual. (If less than full dues obligation is collected, a reason is to be provided as to why a lesser amount was collected by local.)
 If the total amount of dues collected is not provided for each cancellation, the Membership Department will contact you to obtain the information. The local will continue to be billed 100% of dues until the information is provided.
Remember, membership dues have two components, the portion that is kept by the local and the portion that is sent to OEA.

Step One – Calculating the Portion kept by the local:

- List the current Local Portion of Dues for this individual (Local Dues) _____
- Divide by total number of payroll deductions for the year _____
- This total equals the amount of local portion of dues per payroll deduction _____
- Multiply number of payroll deductions completed for the individual (include final pay) _____
- This total equals the amount of the local portion of dues collected by payroll deduction _____

Step Two – Calculating the Portion sent to OEA:

- Total amount of dues collected from the individual including the final pay _____
- Subtract local portion of dues calculated from Step One _____
- This total is the amount due to OEA and should be listed in Column E _____

For questions contact Membership at membership@ohea.org or call InOEA at 1-844-632-4636.
 Rev. 04/22



SECTION IV – TREASURER HELP AND GUIDELINES

Completed Materials Checklist:

Here are some important points for the Treasurer, Membership Chair and/or Association Representatives to check once the current year membership materials are completed and ready to mail to OEA.

- Provide OEA website link for online enrollment and renewals. OEA offers convenient online enrollment. The on-line module is extremely easy to use and requires only a few “clicks” to complete the enrollment process. “Join Now” can be accessed via the OEA website at: www.ohea.org/why_belong or via QR code.



- The “TOTAL ANNUAL DUES” must be completed accurately on all forms and materials. The total amount of dues to be collected should be written in this box including any affiliated organizations (art, language, science teachers, etc.) that the member opted to join. The local association is responsible for collecting and transmitting the correct amount of dues to OEA Membership Department.
- All enrollment and renewal forms need a method of payment indicated (continuing payroll deduction, payroll deduction, cash or check). All checks should be made payable to the local association. Deposit any cash or check payments to the local’s bank account and send one check to OEA.
- Make sure the member has signed and dated the form in both membership and dues authorization sections. The date determines the effective date of coverage under the OEA/NEA Legal Services Program.
- Distribute each of the four copies of the enrollment and renewal form. The top (white) sheet should be returned to OEA. The second (green) sheet should be sent to your employer payroll department if the member is using payroll deduction. The local association should keep the third (yellow) sheet. The fourth (blue) sheet is the member’s receipt.
- Check the total amounts on the continuous roster and review non-work phone numbers and add non-work e-mail addresses.
- Make two copies of the continuous membership roster. Give one to the employer payroll department for payroll deductions and keep one for the local’s records.
- Make sure all half-time, and quarter-time members are clearly marked on the enrollment forms by checking the appropriate box located at the top center portion of the forms.

- Forms are to be grouped in categories, e.g., renewals, new enrollments, continuing memberships. Return all initial enrollment materials and forms in the self-addressed envelope included. This self-addressed envelope should be postmarked on or before October 15.

Collecting Forms by Building

OEA suggests a single collection point which allows for more accurate local accounting and reduces the chances of a building being missed. For larger locals, it may be easier to determine if all buildings have been accounted for in the membership collection process by having the membership forms from the building representatives sent to one person designated within the local.

Returning Materials to OEA

A self-addressed envelope is included with the membership materials. Return all initial enrollment materials and forms in the self-addressed envelope. This self-addressed envelope should be postmarked on or before October 15.

Membership Processing and Accounting Master Schedule

The following schedule provides you an overview of the membership year and highlights those forms and activities which occur during the year. The Membership Department processes membership enrollment forms and accounts for all monies received from the local association or treasurer of the board. In addition, OEA collects and forwards the dues to the NEA and the OEA Districts.

June/July	Online enrollment for new membership year begins Treasurer's on record with OEA will be mailed all future year Membership Enrollment Materials. The Local President is the recipient if there is no Treasurer of record.
September 1	IRS 990 is available for filing for the current year. File early!
September 30	Dues Transmittal agreement and schedule information postmarked and sent to OEA.
Sept—Aug	Monthly electronic billing statement with access to monthly roster See new ePay option, page 1-27.
October	Confirm any new enrollments received after submitting your membership materials receive the appropriate pro-rated dues amount
October 15	All membership forms and materials – enrollment, renewals, continuing roster printout, must be postmarked to OEA by October 15. (This is also a criterion for the Fiscal Fitness Award.) TIP - Continuing roster - It is very important to include your continuous roster with your membership materials even if there are no changes. (Also required for the Fiscal Fitness Award for all continuous member locals.)
November	A letter indicating a loss of delegates will be sent if the previous year's dues are not paid by the Fall Representative Assembly. This letter is sent only to those local associations with an outstanding dues balance from the preceding year.
January 20	990 OEA Verification Form postmarked to OEA. The form is to verify the 990 has been submitted. (This is a criterion for current year Fiscal Fitness Award.) Please note: the IRS website is typically down during the end of December through early January to add changes or new language for the tax year. You may want to file your 990 early!
January 31	Application for Fiscal Fitness Award due no later than January 31.
February	You will receive a list of all members whose mail has been returned to us by the Post Office marked "undeliverable."
April	You may receive a notification letter if you are in danger of not complying with the NEA Bylaw provision, requiring 40% of your dues being transmitted to OEA by March 30.
May	You may receive a notification letter if you are in danger of not complying with the NEA Bylaw provision, requiring 70% of your dues being transmitted to OEA by June 1.

Additional Helpful Reminders

Provide OEA website link for online enrollment

OEA offers convenient online enrollment. The on-line module is extremely easy to use and requires only a few “clicks” to complete the enrollment process. “Join Now” can be accessed via the OEA website at: www.ohea.org/why_belong or via QR code.



Send Only Current Membership Year Dues with Membership Materials: Include only payments for OEA/NEA/UniServ/District. **Do not include:**

- Local dues.
- Contributions to the OEA Fund.
- Checks made out to the affiliated department or associate organizations.

Clearly Identify Checks: Local association checks returned with processing materials must:

- 1) Clearly identify the Local Association’s name and User Local ID or 4-digit ID from billing statements.
- 2) Clearly state if the check is for “Cash Payers.”
- 3) Checks should only be for the membership year being processed. Separate checks should be written for previous years.
- 4) Checks should include only payments for dues (do not include OEA-Fund amounts).
- 5) Check made payable to the Ohio Education Association

Duplication of Information: If an individual is on the continuous membership roster, do not complete a new form unless the method of payment is changing. Make all changes directly on the continuous membership roster.

Omitting Members: If an individual signed up after June of the current membership year for continuous membership and they are not on the continuous membership roster, they must fill out an enrollment form.

Membership Deadline: Locals must submit their membership enrollment forms and/or corrected continuing payroll deduction roster on or before October 15.

Send All Membership Materials to OEA at the Same Time: Materials that are sent to OEA by building have a greater chance to be lost in the mail or left in one of the buildings. To account for all of the buildings, gather all material in a central location and follow the mailing instructions in the Membership packet.

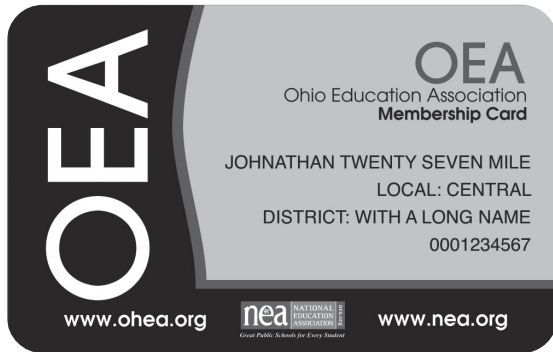
Send Only Membership Materials in the Processing Package: Do not put any other items in the package. Send any remaining payments for previous membership year and correspondence for other departments separately.

OEA’s membership and accounting process relies very heavily on the cooperation of all locals in these areas.

Membership Card

- For new enrollments the OEA Membership Card will be mailed to the member's home address after the local's membership materials are processed by OEA.
- The OEA Membership Card will have preprinted member information on the front and important OEA/NEA information on the back.
- With the OEA Membership Card, our members are able to log into the Access Program and enter their individual ID number to receive special discounts and offers.
- Membership cards **are not** replaced on an annual basis. The card is permanent until the individual is no longer a member or OEA issues a new card.
- Members that have misplaced their cards can get a replacement by calling InfOEA at 1-844-632-4636 or by e-mail at **membership@ohea.org**.

Example Membership Card



For online member discount programs and member contact information updates, go to **www.ohea.org**

- Find the membership card image
- Choose the appropriate link
- Follow the online instructions

For additional money-saving programs for members. **NEA Member Benefits**, visit www.neamb.com or call 1-800-637-4636

Example Membership Card Carrier

With OEA ACCESS and NEA Member Benefits, MEMBERSHIP DOESN'T COST, IT PAYS!

Thank you for being a part of your local association, district association, OEA and NEA. Your membership alone is your key to the many services and benefits offered.

Enjoy financial programs and discounts offered by NEA Member Benefits:

- Savings & investment programs
- Credit, home financing and loan programs
- Special member-only discounts through the NEA Click & Save program

Save even more with your OEA membership and the OEA ACCESS program:

- A wide range of professional services and benefits
- Professional liability coverage
- OEA/NEA periodicals and publications
- Member-only discounts and services at many local and national businesses

Refer to the back of the attached membership card for simple instructions on how to access the special member's area of the OEA website.

Your OEA membership can save you hundreds of dollars with coupons, discounts and promotions.

Ohio Education Association | www.ohea.org

Thank you for your membership! www.ohea.org

Membership cards are not replaced on an annual basis.

Retain this membership card, as this will be your permanent card until you are no longer a member or a new card is distributed by OEA.

To update your contact and certification information, visit www.ohea.org or email membership@ohea.org

Go to www.ohea.org to start saving up to 50% on: Automotive • Car Rental • Condos • Cruises • Dining • Golf Groceries • Health & Beauty • Home & Garden • Hotels Movies • Recreation • Services • Shopping • Travel

OHIO EDUCATION ASSOCIATION

(614) 228.4526 or 1.800.282.1500 (toll free); www.ohea.org

- A wide range of professional services and benefits
- Member-only discounts through the ACCESS program
- Professional liability coverage
- OEA/NEA periodicals and publications

NEA MEMBER BENEFITS – Your Dedication Drives Ours®
1.800.637.4636 (toll free); www.neamb.com

- Savings & investment programs
- Credit, home financing & loan programs
- Special "member-only" discount programs

To activate your membership card, log in to www.ohea.org or call 866-203-5167.

Guidelines for Retired Membership:

Membership in the retired division requires:

- Unified membership in both OEA-Retired and NEA-Retired.*
- An active membership in OEA for at least one year.
- Retirement through a State Retirement System in Ohio (i.e. STRS, SERS, OPERS)

***Unified membership is a requirement to maintain all NEA Member Benefits products (NEAMB).**

Individuals that are officially retired, and have returned to the education profession, must join the highest level of membership for which they are eligible. Individuals in your bargaining unit are not eligible to hold an active membership in the Retired Division, and they must join as an active member.

Example Retired Membership Form



RETIRED EDUCATOR MEMBERSHIP ENROLLMENT Membership Year September 1, 2023 - August 31, 2024



If you have retired and have not previously enrolled with the OEA-Retired Division you can immediately enroll on-line using a credit card (VISA or MasterCard) at the NEA web site <https://ims.nea.org/JoinNea/>. Otherwise, use this form to enroll as a retired member and send payment to OEA – Membership, 225 East Broad St., Columbus, OH 43216. (See payment option below.)

Membership in the retired division requires

- Unified membership in both OEA-Retired and NEA-Retired.*
- An active membership in OEA for at least one year.
- Retirement through a State Retirement System in Ohio (i.e. STRS, SERS, OPERS).

Retirement Date _____ Last four digits of SSN or Member ID _____
Name (please print) _____
Address _____
City, State, Zip Code _____
Primary Phone (with area code) _____ Home E-Mail Address _____
School District Name (from which you have retired) _____

If this is your first year of retirement please check one of these options.

One Time Payment Option:

- \$450.00 OEA-R/NEA-R Life - With this option your OEA-Retired and NEA-Retired membership will be paid in full for life.

Annual Payment Options:

- \$35.00 OEA-R First Year Free/NEA-R Annual - With this option OEA will send you a renewal form each August to pay the annual retired membership dues. (The OEA portion of unified dues is waived for the first year of retirement.) Annual dues after the first year is currently \$60.00. (OEA: \$25 - NEA \$35)
- \$300.00 OEA-R First Year Free/NEA-R Life - With this option NEA-R dues will be paid in full for life. OEA will send you a renewal form next August to pay the OEA-Retired portion of dues. (OEA Retired Life dues is currently \$150.00)

If you retired in a prior year, choose one of these options.

One Time Payment Option:

- \$450.00 OEA-R/NEA-R Life - With this option your OEA-Retired and NEA-Retired membership will be paid in full for life.

Annual Payment Option:

- \$60.00 OEA-R/NEA-R Annual - With this option OEA will send you a renewal form each August to pay the annual retired membership dues.

Make your check or money order payable to Ohio Education Association.

Dues payments are not deductible as charitable contributions for federal income tax purposes. Dues payments (or a portion) may be deductible as a miscellaneous itemized deduction. Lobby expenses paid or incurred as part of membership dues cannot be deducted from your income taxes. The amount of the OEA membership dues attributable to lobby expenses and actual deductible dues dollars will be reported annually in the January issue of Ohio Schools Magazine for all levels of membership.

An OEA retired member who becomes employed by a public school district, public or private college or university, or other public institution devoted primarily to education, if eligible, must seek active membership in the OEA.

*Unified membership is a requirement to maintain all NEA Member Benefits products (NEAMB).

Signature: _____ Date: _____

Example Retired ESP Membership Form



RETIRED ESP MEMBERSHIP ENROLLMENT Membership Year September 1, 2023 - August 31, 2024



If you have retired and have not previously enrolled with the OEA-Retired Division you can immediately enroll on-line using a credit card (VISA or MasterCard) at the NEA web site <https://ims.nea.org/JoinNea/>. Otherwise, use this form to enroll as a retired member and send payment to OEA – Membership, 225 East Broad St., Columbus, OH 43216. (See payment option below.)

Membership in the retired division requires

- Unified membership in both OEA-Retired and NEA-Retired.*
- An active membership in OEA for at least one year.
- Retirement through a State Retirement System in Ohio (i.e. STRS, SERS, OPERS).

Retirement Date _____ Last four digits of SSN or Member ID _____
Name (please print) _____
Address _____
City, State, Zip Code _____
Primary Phone (with area code) _____ Home E-Mail Address _____
School District Name (from which you have retired) _____

If this is your first year of retirement please check one of these options.

One Time Payment Option:

- \$255.00 OEA-R/NEA-R Life - With this option your OEA-Retired and NEA-Retired membership will be paid in full for life.

Annual Payment Options:

- \$21.00 OEA-R First Year Free/NEA-R Annual - With this option OEA will send you a renewal form each August to pay the annual retired membership dues. (The OEA portion of unified dues is waived for the first year of retirement.) Annual dues after the first year is currently \$33.50. (OEA: \$12.50 - NEA \$21)
- \$180.00 OEA-R First Year Free/NEA-R Life - With this option NEA-R dues will be paid in full for life. OEA will send you a renewal form next August to pay the OEA-Retired portion of dues. (OEA Retired Life dues is currently \$75.00)

If you retired in a prior year, choose one of these options.

One Time Payment Option:

- \$255.00 OEA-R/NEA-R Life - With this option your OEA-Retired and NEA-Retired membership will be paid in full for life.

Annual Payment Option:

- \$33.50 OEA-R/NEA-R Annual - With this option OEA will send you a renewal form each August to pay the annual retired membership dues.

Make your check or money order payable to Ohio Education Association.

Dues payments are not deductible as charitable contributions for federal income tax purposes. Dues payments (or a portion) may be deductible as a miscellaneous itemized deduction. Lobby expenses paid or incurred as part of membership dues cannot be deducted from your income taxes. The amount of the OEA membership dues attributable to lobby expenses and actual deductible dues dollars will be reported annually in the January issue of Ohio Schools Magazine for all levels of membership.

An OEA retired member who becomes employed by a public school district, public or private college or university, or other public institution devoted primarily to education, if eligible, must seek active membership in the OEA.

*Unified membership is a requirement to maintain all NEA Member Benefits products (NEAMB).

Signature: _____ Date: _____

Add your notes here
