

# OEA MEMBERSHIP DEPARTMENT

## 2023-2024

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

November 30, 2023

#### December Reminders:

- **2nd**—OEA Representative Assembly
- **20th**—OEA Offices will close for Winter break and will re-open January 2, 2024
- **29th**—Dues payment to OEA. (Remember to include your local's 4-digit ID number on your check payments.)
- December billing statements will be made available during the first week of January 2024.

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

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

#### InfoOEA HOURS -

Monday—Friday  
8:30 AM-5:00 PM



Thanks for your continued efforts and support.

If you have questions or concerns please contact us by e-mail:  
[membership@ohea.org](mailto:membership@ohea.org)  
Or by telephone: InfoOEA at 1-844-632-4636

The November 2023 billing statement is now available in the eBilling Portal, <https://ims.nea.org/ebilling/>. The most current roster is available on the eBilling portal and is accessible at any time. Please be sure to take time to thoroughly review your billing statement and membership roster in order to reconcile your membership information.

#### **Ohio Education Association Membership Reconciliation Tips**

Your local's billing and monthly amount due to OEA is dependent on accurate membership records. OEA relies on local associations to provide accurate and timely information to both OEA and the employer payroll department. To ensure proper billing, it is imperative the local, employer and OEA membership records match. It is important to have strong communication between you and your payroll office.

The OEA monthly billing for each membership year is calculated based on the local's current membership records and the local's **Dues Transmittal Agreement\*** for that membership year.

To confirm the local is collecting the correct amount of dues per member, and that OEA is billing the local for the correct memberships for the membership year, it is important the local maintain ongoing membership reconciliation throughout the membership year. You, as Treasurer, should be receiving from your payroll office the exact amount of dues OEA is billing you each month. If that is not occurring, it is important you take the time to review all membership records.

Some quick things to check:

- Compare the OEA membership roster to the payroll deduction list received with each payment from the employer. *Do the lists match? Is everyone currently having deductions?*
- Verify that each member's payroll deduction amount is enough to meet their full year's dues obligation before payroll deductions come to an end for that membership year. *Have there been deductions missed? Are the deducted amounts correct?*
- Confirm the local has collected the full year's dues obligation for all cash payers as those are due in full at the start of the membership year.
- If members are missing from the OEA roster and/or the payroll deduction list, investigate and take corrective action to make sure the members' dues obligation amounts are being met. Work with your payroll office and/or OEA Membership to make sure all have the exact same information.

The update form provided to you each month should be used to make any needed changes or edits. Providing these updates will ensure all billing will remain accurate and current throughout the membership year.

Please reference the Treasurers Handbook Chapter 1 section titled: "Reconciliation of Local Association Members" for additional information.

If you have questions or need additional detailed assistance regarding reconciling your local's membership records, contact infoOEA at 1-844-632-4636 or [membership@ohea.org](mailto:membership@ohea.org).

**\*Your local has a Dues Transmittal Agreement with OEA which governs the timing and transmittal of dues payments. This agreement is what the monthly billing from OEA is based upon. It is important to note the transmittal schedule may not coincide with a school year calendar. It is important for you to know per the OEA Bylaws: 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.**

**Issues Filing your 990-N?**

As we are beginning a new fiscal year, you will need to file your 990 with the IRS. The IRS has again changed the 990-N login process and you may be experiencing difficulties. This affects those who have not logged in prior to February of 2023. If this applies to you, please see the below steps to create a **New** login and filing.

1. Open the electronic filing page:

[Annual Electronic Filing Requirement for Small Exempt Organizations — Form 990-N \(e-Postcard\) | Internal Revenue Service \(irs.gov\)](https://www.irs.gov/efile)

2. Scroll down to the hyperlink box "Submit Form 990-N (e-postcard)", click on this box and it will direct you to the main IRS 990-N login. There is also a full User Guide available on this page.

A. Recommended to bookmark this page for future reference.

3. Create a new account with Login.gov.

A. A **NEW** account is needed if you have not logged in prior to February 2023.

4. After creating a new account, log into IRS 990-N.

5. Once logged in select manage e-postcard profile.

6. Under "You Are Logged in as" choose edit, exempt org, and enter your EIN.

7. Click create new filing and proceed with filing.

8. When creating, please note the below items as they will result in errors and prevent filing:

A. Update the e-postcard profile.

B. When entering the address, do not use punctuation.

i. Example: when entering street, either spell out the word or use ST with no punctuation. Using ST. will result in an error that will prevent you from filing. This applies to periods, commas, dashes, ect, as all will result in an error.

**Reminder:** Please file your 990 prior to the end of the calendar year if possible. Historically, January is when the IRS website is down for updates and maintenance.

When completing your **annual** 990-Filing with the IRS during the period of September through January 15th, remember this filing is for the 2022-2023 Fiscal/Membership year (September 1st—August 31st) and **tax year 2022**. Questions on filing should be directed to Shawn Primm at 1-800-282-1500 Ext. 3017 or [primms@ohea.org](mailto:primms@ohea.org). Remember to complete, sign and return the OEA 990 Verification Form with a copy of the accepted submission.

**Upcoming Deadlines:**

- January 20th—IRS 990 Verification submitted to OEA
- January 30th—The application for the Fiscal Fitness Award needs to be received by the OEA Secretary/Treasurer. Locals have the opportunity to meet the criteria for the 2023 award based upon their financial performance for fiscal year 2022-2023. The OEA Fiscal Fitness Awards will be given at the May 2023 Representative Assembly where locals will be recognized with cash awards for their financial performance. All of the criteria and the process for participating in this program are available online by logging onto the OEA website. The OEA Treasurer's Handbook is another source of information.

**Join Now Online Enrollment for new members**

Access Join Now via the OEA website: [www.ohea.org/why\\_belong](http://www.ohea.org/why_belong). Once on the "Why Belong" web page the new member will select the "Join Now" button and will immediately begin the enrollment process. Upon completion of their enrollment, the new member will be provided a confirmation reflecting the information they submitted along with their new member ID number. This confirmation will be sent directly to the member via their email address and a copy will be sent to the OEA Membership Department. An electronic roster of all online enrollments will be sent directly to the appropriate Local Treasurer's email of record as new members join. For questions or additional information, please call membership at 1-844-632-4636 or [membership@ohea.org](mailto:membership@ohea.org). **Be sure these enrollments are provided to your payroll office.**