



OEA MEMBERSHIP DEPARTMENT

2024-2025

Monthly Membership Guide & Updates

December 2024

January Reminders:

- **15th**—If your local year end is August 31, your IRS 990 tax filing should be filed.
- **20th**—990-Filing Verification form due to OEA.
- **31st**—Dues payment to OEA. (Remember to include your local's 4-digit ID number on your check payments.)
- **31st**—Fiscal Fitness Award application due to OEA.

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

- ⇒ 24-25 Local Treasurer's Handbook
- ⇒ Monthly Treasurer's Memos (past 12 months)
- ⇒ 24-25 Dues Rates and Pro-Rate Dues Tables
- ⇒ Forms for reconciliation
- ⇒ Membership Update form

InfoEA HOURS -
Monday—Friday
8:30 AM-5:00 PM

The December 2024 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.

All membership processing of our Locals' returned membership materials for the current membership year is complete. The electronic roster available with this month's billing statement in the eBilling portal reflects all updates returned as of December 31, 2024. If your Local did not return materials or provide any updates, the roster will reflect information OEA has on file from your most recent update. **Please utilize this roster information to review and confirm all requested updates have been completed.**

Issues Filing your 990-N?

You will need to file your 990 with the IRS. Please see the below steps to login and file:

- ⇒ 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/annual-electronic-filing-requirement-for-small-exempt-organizations-form-990-n)
- ⇒ 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. (We recommended to bookmark this page for future reference.)
 - ◇ Create a new account with Login.gov.
 - ◇ Log into the IRS using login.gov.
 - ◇ Once logged in select manage e-postcard profile.
 - ◇ Under "You Are Logged in as" choose edit, exempt org, and enter your EIN.
 - ◇ Click create new filing and proceed with filing.
- OR** If you already have a login:
 - ◇ Log into the IRS using login.gov
 - ◇ Select "Manage form 990-N submissions"
 - ◇ Click create new filing and proceed with filing

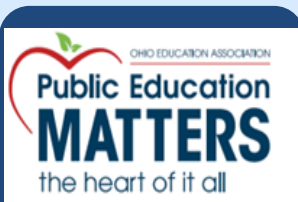


When creating a new account login, please note the below item as it will result in errors and prevent filing:

- ◇ When entering the address, do not use punctuation.

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, etc., as all will result in an error.

- When filing your **annual** 990 with the IRS during the period of September thru January 15th, remember this reporting is for the 2023-2024 Fiscal/Membership Year (September 1st – August 31st) and **tax year 2023**. Questions on filing should be directed to Shawn Primm at 1-800-282-1500 Ext. 3017 or primms@ohea.org. Remember to complete, sign and return the OEA 990 Verification Form with a copy of the accepted submission.
- **Application for the Fiscal Fitness Award is due to the office of OEA Secretary/Treasurer, Robert McFee by January 31st.**



Thanks for your continued efforts and support.

If you have questions or concerns please contact us by e-mail:
membership@ohea.org

Or by telephone: InfoEA
1-844-632-4636



Frequently Asked Questions:

- Q. How do I complete the total amount of dues collected on the Membership Update Form for a cancellation?**
- A. There is a sample on page 1-31 of the OEA Treasurer's Handbook explaining the process. **Be aware that a cancellation does not eliminate the obligation to pay full dues as agreed to on the original enrollment form/renewal form.**
- Q. What reason/description should I use for cancelling a member on the Membership Update Form?**
- A. Always be as specific as possible when providing a reason description. "Retired", "reduction in force (RIF)", "deceased", "switched employer", "resigned membership" are good examples to use. When in doubt please contact InfOEA at membership@ohea.org or 1-844-632-4636.

Reconciliation Reminder!

- ⇒ Monthly reconciliation is important. The billing for the local depends on the accuracy of the data provided by the local.
- ⇒ Each billing cycle, review your membership records to determine if there are any new members, if membership types need to be changed (i.e.. 1/2 time to full time) or if any memberships need to be cancelled (retirement, change of local, resignation).
- ⇒ Complete a current year Membership Update Form (sent via email) for changes that need to be made.
- ⇒ Have new members complete a Member Enrollment form and mail it to OEA. *Please note the member's signature is required twice on an Enrollment (or Renewal) form. Prior year forms cannot be accepted due to new legal language and the dual signature requirement.*

Join Now Online Enrollment for new members

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

Upcoming Events:

OEA 2025 Advocacy and Organizing Institute—

The 2025 OEA Advocacy and Organizing Institute will be held February 20-22, 2025 at the Hyatt Regency in Columbus.

Go to aoi.ohea.org to register or use the QR code.

