

TREASURER AND MEMBERSHIP

Newsletter Notes



THE VOICE FOR PROFESSIONAL
EDUCATORS AND STUDENTS



Greetings!

I am sure that many of you, like me, are ready for spring. As we head into March, I want to encourage every local to get their annual audit submitted in a timely manner. As a reminder, we have updated the affiliate standards policy, and the letter that the local president submits now requires two officers to sign off on it.

The Representative Convention is coming up at the end of April. Please remember that all locals must have 40 percent of their dues paid for their delegates to be seated at our state convention.

Please contact us if you have any questions concerning your audit, treasurer responsibilities or membership rosters. If you need assistance with any aspect of your role, we can provide you with the assistance you need.

Treasurer Update

Form 990 Series Filing Offer from 501(C)(3) Center

If you receive an email or letter from 501(C)(3) Center with the above subject line, please ignore it. This third party filing company offers assistance with filing Form 990 Series through its website at a fee. The company has obtained the local information from the Internal Revenue Service website. All Form 990-N filed returns are posted on the [IRS website](#).

If you have not already filed Form 990-N (e-Postcard), please file directly with the IRS at no cost. The [User Guide](#) outlines steps for using the [Form 990-N Electronic Filing System](#). Contact [Rose](#) if you have any questions.

Does your local have a credit card?

If so, adopt a written and board-approved policy to ensure proper use of the card. The policy needs to address the following: authorized users, authorized uses, prohibited uses, expenditures amount limits, documentation requirements and monitoring compliance with the established credit card policies.

Below are some recommendations:

- The credit card account should be under the local's Employer Identification Number.
- Establish a monthly credit limit on the credit card in accordance with the budget (probably no more than \$1,000-\$1,500 per card).
- The credit card policy should prohibit cash withdrawals and charging of personal expenses.
- The credit card statement should be thoroughly reviewed regularly by someone independent of those who have the cards.
- Receipts should be submitted on a timely (monthly) basis and matched up against the statement at the time the payment is being made.
- Detailed receipts must be retained and attached to the credit card statements. For example, in the case of meals, each receipt must include the names of all persons and a brief description of the business purpose of the expense.

[Learn more here.](#)

Audits reminder

Affiliates now have two options to submit audit reports. You can choose to email the report or mail hard copies to Education Minnesota.

Email:

Scan and save your report as a PDF document and send to auditreports@edmn.org.

Please ensure that all copies are legible.

Mail to:

Education Minnesota
Attn: Accounting Department/Audit Reports
41 Sherburne Ave.
St. Paul, MN 55103-2196

Membership News

Education Minnesota Early Enrollment Program

Who is eligible?

Early enrollment is limited to recruits for the 2019-20 membership year who are either:

1. First-time active members with an employment start date between April 1, 2019 and Aug. 31, 2019.
2. Potential members who have **never** held an active membership in an NEA affiliated local. To request a list of your local's eligible potential members, please contact your local field office or field staff.

For all purposes, including membership counts and governance representation, early enrollees are non-members until the membership year begins on Sept. 1, 2019.

Why join?

To receive access to an array of member benefits from the organizations listed below beginning April 1, 2019 through Aug. 31, 2019 at no cost.

- 1) NEA Educators Employment Liability (EEL) Program – professional liability insurance
- 2) NEA Member Benefits Programs

- For a comprehensive look at all the programs and services NEA Member Benefits offers early enrollees, [visit their website](#).
- Please note that first-time active early enrollees **are not** eligible to participate in the NEA Complimentary Life and Introductory Life Insurance programs and the Unified Legal Services Program (ULSP)* until their memberships are fully activated in September 2019.

* Unified Legal Services Program (ULSP) is available before Sept. 1 to first-time active members when their school year work starts before Sept. 1. ULSP covers that member's work for the school and continues, after Sept. 1, as part of their regular benefits from the association.

The distinction between when EEL and ULSP becomes a benefit is shown in the continuum below:

First-time active member	April 1	May	June	July	Aug.	Sept., etc
April 1 and school year work starts Aug. 15	EEL No ULSP	EEL No ULSP	EEL No ULSP	EEL No ULSP	EEL ULSP as of Aug.15	EEL ULSP

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3. AFT Member Benefit Programs

- For a comprehensive look at all the programs and services AFT Member Benefits offers early enrollees, [visit their webpage](#).
- Please note that first-time active early enrollees **are not** eligible to participate in the AFT Group Term Life Insurance and Defense Fund until their memberships are fully activated in September 2019.

4. Education Minnesota ESI Member Benefit Program.

- For a comprehensive look at all the programs and services Education Minnesota Economic Services Inc. (ESI) Member Benefits offers early enrollees, [visit their webpage](#).
- Please note that first-time active early enrollees **are not** eligible to participate in the Identity Theft Recovery Protection Plan until their memberships are fully activated in September 2019.

How to join:

1. Complete, sign and date the 2018-19 [Early Enrollment Membership Pledge Form](#) and the 2018-19 Education Minnesota Application Form.
2. Attach the [2018-19 Early Enrollment form](#) to the 2018-19 Application Form and return both of them to the Education Minnesota membership department:

Education Minnesota
41 Sherburne Ave.
St. Paul, MN, 55103

Checklist:

1. Ensure that the employment start date is entered on the application and the pledge form.
2. Ensure that the application and the pledge forms are signed and dated.
3. Ensure that each membership application has an accompanying early enrollment pledge form.

- Applications received without the pledge form will be processed as a regular application.
- Early enrollment pledge forms received without an application cannot be processed and will be returned to the local.

Upcoming Dates:

April 26-27 – Education Minnesota Representative Convention

Education Minnesota Secretary-Treasurer Rodney Rowe: rodney.rowe@edmn.org

Treasurer/IRS/audit concerns contact Rose Tuiyott-Lewis: rose.tuiyott-lewis@edmn.org

Membership/dues/billing statement concerns contact Michelle Johnson: michelle.johnson@edmn.org

Education Minnesota: 1-800-652-9073

Education Minnesota, 41 Sherburne Ave., St. Paul, MN 55103 | 651-227-9541 | 800-652-9073

Education Minnesota is an affiliate of the American Federation of Teachers,
National Education Association and AFLCIO.

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