

# OEA MEMBERSHIP DEPARTMENT

## 2019-2020

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

October 31, 2019

#### November Due Date Reminders:

- 3rd—Daylight Savings Time Ends.
- 15th—Changes can no longer be made to 2018-2019 membership records.
- 26th—Dues payment to OEA. (Remember to include your local's 4-digit ID number on your check payments.)
- 28th & 29th—OEA is closed for Thanksgiving Holiday.

- Enclosed is the October 2019 billing statement for the current 2019-2020 Membership Year.
- If you have also received a Billing Statement for the 2018-2019 Membership Year (the year is at the top of the first page i.e. 18-19), your local has a balance due for the previous membership year. Failure to pay the balance due for the prior membership year of 2018-2019 may result in delegates not being seated at the Fall OEA RA. If you feel there is an error in your 2018-2019 Billing Statement, please contact InfoOEA at 1-844-632-4636 or [membership@ohea.org](mailto:membership@ohea.org) immediately. **Changes to the 2018-2019 membership records will not be accepted after November 15<sup>th</sup>.**
- When processing your **annual** 990-Filing with the IRS during the period of September thru January 15<sup>th</sup>, remember this filing is for the 2018-2019 Fiscal/Membership Year (if the period is from September 1<sup>st</sup> – August 31<sup>st</sup>) and **tax year 2018**.
- Once your local's initial enrollment materials have been processed, the Membership Department will send an electronic copy of the Membership Roster to the Treasurer. Please check this roster carefully. Errors in your local association's membership records will cause your Billing Statement to be incorrect. **Once the roster has been reviewed, use the current year Membership Update Form to make changes, if needed.**
- The Enrollment and Renewal Forms required two signatures. You may have received forms back from OEA if both signatures were not on the form. It is important to obtain the members signature for both new enrollees as well as annual renewal memberships. Contact InfoOEA with any questions.



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  
1-844-632-4636

#### Miscellaneous:

##### 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. It is expected for the treasurer or local designee to be familiar with these guidelines and communicate directly with the member on LOA. Refer to page 1-2 of the OEA Treasurer's Handbook for additional details on specific dues amounts.

##### Reservists called to active duty

Active membership will be continued for an OEA member who is a military reservist called to active duty due to the current U.S. efforts against terrorism. Dues for such member will be suspended until they return to previous education employment. Treasurer's need to report this on the current membership roster at the beginning of the membership year or update their records using the current year Membership Update Form.

##### 990 E-Postcard

Locals required to file the 990 E-Postcard electronically may now go to [www.irs.gov](http://www.irs.gov) to complete the tax year 2018 (9/1/18-8/31/19) filing. If you have any questions please contact Shawn Primm at [primms@ohea.org](mailto:primms@ohea.org) or by phone at 1-800-282-1500 Ext. 3017.

\*All enclosures are sent to the local treasurer. This mailing to other officers is for informational purposes only.

## Cancellation Requests After the August Drop Window

It may be possible you will be presented with a membership and/or payroll deduction cancellation request from a current member during the 19-20 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 his/her membership, you must immediately send his/her 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.