

OEA MEMBERSHIP DEPARTMENT 2019-2020 Monthly Membership Guide & Updates For Local Association Leaders

September 30, 2019

October Reminders:

- **15th**—Postmark date of ALL enrollment materials to OEA including completed Dues Transmittal Agreements
- **28th**—Dues payment to OEA (Remember to include your local's 4-digit ID number on your check payments.)
- Review Electronic copy of Membership Roster immediately upon receipt.

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

Or by telephone: InfoOEA at
1-844-632-4636

- Enclosed is the September 2019 billing statement for the new 2019-2020 Membership Year. **Please Note:** Many locals do not start payroll deductions until October or November so you may have a billing statement with no balance due and nothing needs returned.
- If your local has a balance due for the previous 2018-2019 Membership year, a 18-19 billing statement will also be enclosed with the amount due printed in the upper right hand corner after the phrase "MINIMUM DUES/FEEES DUE". Be sure to reference your Dues Transmittal Agreement for payment schedule. Failure to pay the balance due 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 immediately.
- Once local membership materials are processed, OEA will send you a complete Membership Roster electronically. Please check the roster carefully. Errors in your local association's membership will cause your Billing Statement to be incorrect. **Once you have reviewed the roster, use the current year Membership Update Form to make necessary changes and then forward to OEA in the monthly envelope provided.**
- When processing your **annual** 990-Filing with the IRS during the period of September thru January 15th, remember this filing is for the 2018-2019 Fiscal/Membership Year (September 1st – August 31st) and **tax year 2018**. 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.
- As a reminder, Enrollment forms and Renewal forms require 2 signatures to be processed for membership. Prior to mailing your enrollment packet to OEA, please verify that all forms contain both signatures.

Membership Updates

- Membership Updates for 2019-2020 will not be processed until after the Local's 2019-2020 Initial Membership Enrollment Forms have been processed. Please do not submit any updates until you have reviewed the 2019-2020 Membership Roster, which is provided to you once your new year membership materials are received and processed.
- The "Statement of Account" (billing statement) for the current membership year begins this month. The Billing Statements are processed at the end of each month and mailed the first week of the following month. The payment due date is located in the upper right hand corner of the statement (for more details see the Example Billing Statement in the Treasurer's Handbook in Chapter 1.)
- Your local should begin receiving payroll deduction lists/reports from your employer payroll department along with each check for the dues deducted. This list/report should always be reviewed and reconciled for accuracy, such as deduction amount and names to keep your monthly billing accurate.

*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.