

# OEA MEMBERSHIP DEPARTMENT 2019-2020

## Monthly Membership Guide & Updates For Local Association Leaders

August 31, 2020

### August Treasurer Highlights

#### September Reminders:

- 27th-Dues payment to OEA. (Remember to include your local's 4-digit ID number on your check payments.)
- 30th-Dues Transmittal Forms to OEA.
- Return Membership Materials As Soon As Possible

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

- ⇒ 20-21 Local Treasurer's Handbook
- ⇒ Monthly Treasurer's Memos (past 12 months)
- ⇒ 20-21 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  
(844) 632-4636

#### **ONLINE ENROLLMENT!!**

The OEA Membership Department is excited to announce the availability of on-line Enrollment for the 2020-2021 Membership Year.

We are offering the new "Join Now" functionality as an alternative to the paper form should you be unable to "meet and greet" your new members and have them complete the paper version of the enrollment form in this period of social distancing. In order to utilize the online enrollment process the new member must agree to continuous membership and the payroll deduction payment method for the collection of their dues. (A cash paying member, an annual renewal member or those wishing to pay via the eDues payment method will be unable to use the online process at this time and must use the paper form.)

The on-line module is extremely easy to use and requires only a few "clicks" to complete the enrollment process. "Join Now" is available now and can be accessed via the OEA website at: [www.ohea.org/why\\_belong](http://www.ohea.org/why_belong)

Once on the "Why Belong" web page the new member will select "Join Now" and will immediately begin the enrollment process. The user will find the process very intuitive as they will just need to follow the screens and provide the information requested. 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.

The OEA Membership Department will provide a roster of all online enrollments directly to you, the Treasurer, on a weekly basis.

Any questions or technical issues that may occur during the enrollment process should be directed to the membership department at 1-844-632-4636 or [membership@ohea.org](mailto:membership@ohea.org).

- **As a reminder:** All enrollment materials are to be mailed directly back to OEA. There is one envelope addressed to OEA that was included in your Membership packet for this purpose. Please submit all membership enrollment materials as soon as possible (including the 2020-2021 Enrollment Summary/Potential Count Form). Once your local's membership materials have been processed, an electronic membership roster will be emailed for your review with instructions for next steps.
- The drop window for cancelling membership ended **August 31**. You will be sent an email notification of all membership cancellation requests received by OEA during the August drop window. You will be copied on all confirmations of the cancellation sent directly to the former member. Requests you receive after this date should be forwarded directly to OEA membership. **(Please see back of this document for additional details.)**
- The 2020-2021 Dues Transmittal Agreement has been mailed to all local association treasurers. The completed and signed dues transmittal agreement must be returned to OEA postmarked no later than **September 30**. (Reminder: Meeting this deadline is a criterion for the Outstanding Local Treasurer Award.)
- The 2020-2021 Dues Rates have been posted on the OEA Website at [www.ohea.org](http://www.ohea.org). You may find these in the "Resources" under "Secretary-Treasurer's Office" after you have logged in under "OEA/NEA Dues".

\*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 20-21 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.

**Miscellaneous**

- **Leave of Absence (LOA)** - During your membership drives for the 2020-2021 year, remind all members that during leave they may still have a dues obligation. Please refer to the current Treasurer's Handbook for further instruction.
- It is the Local Association's responsibility to collect the correct amount of dues. Check the dues printed on the enrollment materials before distributing to your Payroll Department.
- If your dues payments are paid directly to OEA by the employer, a copy of each payroll deduction list should be forwarded to OEA with each payment. The original payroll deduction lists should be compared to your local membership records (names and amount) and then adjustments made accordingly with OEA and your employer.
- The 990-IRS Verification form was included in the Initial Enrollment Packet. This form is for the 2019 Tax Year filing. Please note this verification form is to be filled out after you have filed the 990 IRS form, via on-line or paper form. If you have questions please call the numbers printed on the form.

**What should be included in the materials packet I submit to OEA?**

- New Enrollment forms
- Renewal Forms
- Single check made payable to OEA from the local for any cash payers
- Continuous Roster – if your local is a continuous local
- eDues Roster – if your local participates in eDues payments
- Enrollment Summary/Potential Count Form
- 20-21 Dues Transmittal Agreement – if not already submitted