

OEA MEMBERSHIP DEPARTMENT 2020-2021 Monthly Membership Guide & Updates For Local Association Leaders

September 30, 2020

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.

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

- As of the 1st of September, the Membership year 2020-2021 became the current year in the eBilling Portal. The 20-21 billing documents are located at the top of the Billing Statements Download section, as the Current Year Statements. The 19-20 billing documents are now located below the 20-21 billing documents, as the Prior Year Statements. Please take a moment to confirm your local's 19-20 account status and contact OEA with any questions or concerns.
- 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 were sent an email notification of all membership cancellation requests received by OEA during the August drop window. You were 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.**)
- Membership Updates for 2020-2021 will not be processed until after the Local's 2020-2021 Initial Membership Enrollment Forms have been processed. Please do not submit any updates until you have reviewed the 2020-2021 Membership Roster, which is provided to you once your new year membership materials are received and processed.
- 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.
- When processing your **annual** 990-Filing with the IRS during the period of September thru January 15th, remember this filing is for the 2019-2020 Fiscal/Membership Year (September 1st – August 31st) and **tax year 2019**. 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.



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

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

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

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

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.

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.