

# OEA MEMBERSHIP DEPARTMENT

## 2021-2022

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

October 30, 2021

#### November Reminders:

- 7th—Daylight Savings Time Ends.
- 15th—Changes can no longer be made to 2020-2021 membership records.
- 29th—Dues payment to OEA. (Remember to include your local's 4-digit ID number on your check payments.)
- 25th & 26th—OEA is closed for Thanksgiving Holiday.

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

- ⇒ 21-22 Local Treasurer's Handbook
- ⇒ Monthly Treasurer's Memos (past 12 months)
- ⇒ 21-22 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 2021-2022 became the current year in the eBilling Portal. The 21-22 billing documents are located at the top of the Billing Statements Download section, as the Current Year Statements. The prior year 20-21 billing documents are now located below the 21-22 billing documents. Please take a moment to review your local's 20-21 account status and contact OEA with any questions or concerns.
- 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.)**
- 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 any needed changes.**
- 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.
- 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 15<sup>th</sup>, remember this filing is for the 2020-2021 Fiscal/Membership Year (September 1<sup>st</sup> – August 31<sup>st</sup>) and **tax year 2020** (January 1-December 31). Questions on filing should be directed to Shawn Primm at 1-800-282-1500 Ext. 3017 or [primms@ohea.org](mailto:primms@ohea.org). Remember to complete, sign and return the OEA 990 Verification Form with a copy of the accepted submission.
  - ⇒ 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 2020 (January 1-December 31) 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.



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 1-844-632-4636

\*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 21-22 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.

**ONLINE ENROLLMENT!!**

⇒**OEA now offers online enrollment.** The online enrollment allows new enrollees to complete the enrollment process with just a few clicks within the OEA website. "Join Now" 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. 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.
- **An electronic roster of all online enrollments will be sent directly to the appropriate Local Treasurer's email of record as new members join.**
- All new enrollees must agree to continuous membership and must pay their dues obligation via the payroll deduction payment method. A cash paying member or those wishing to utilize the eDues payment method will still need to complete a paper enrollment form.