

OEA MEMBERSHIP DEPARTMENT 2022-2023 Monthly Membership Guide & Updates For Local Association Leaders

October 30, 2022

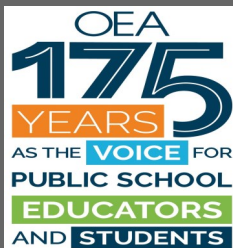
November Reminders:

- 6th—Daylight Savings Time Ends.
- 15th—Changes can no longer be made to 2021-2022 membership records.
- 29th—Dues payment to OEA. (Remember to include your local's 4-digit ID number on your check payments.)
- 24th & 25th—OEA is closed for Thanksgiving Holiday.

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

- ⇒ 22-23 Local Treasurer's Handbook
- ⇒ Monthly Treasurer's Memos (past 12 months)
- ⇒ 22-23 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
Or by telephone: InfoOEA at 1-844-632-4636

- The new 22-23 Membership year began September 1, 2022. Therefore the "Current Year" referenced within the eBilling Portal is the 2022-2023 Membership year and the billing statement and roster documents are at the top of the billing statement download section. The 21-22 Membership year (now considered the "Prior Year") is located below the "Current Year" documents as "Prior Year". Many locals may not have anything listed within the "Current Year Statement Period" as it is so early in the new membership year, but may have a billing statement remaining in the "Prior Year" section. **Please be sure to review both sections to confirm you have nothing pending for the past 2021-2022 year.**
- The authorized membership cancellation period ended **August 31**. You were sent an email notification of all membership cancellation requests received during this time. 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.)**
- 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 completing your **annual** 990-Filing with the IRS during the period of September thru January 15th, remember this filing is for the 2021-2022 Fiscal/Membership Year (September 1st – August 31st) and **tax year 2021**. 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.

Don't want to Handle paper enrollment forms? Check out online enrollment:

Join Now Online Enrollment for new members

A new member can Join Now via the OEA website: www.ohea.org/why_belong. Once on the "Why Belong" web page the new member will select the "Join Now" button 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. For questions or additional information, please call membership at 1-844-632-4636 or membership@ohea.org.

Coming Next Month: No more check writing! ePay is coming! Be sure to review next month's memorandum for details and instructions for this new option.

Membership Cancellation Requests After August 31st

It may be possible you will be presented with a membership and/or payroll deduction cancellation request from a current member during the 22-23 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 their membership, you must immediately send their 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.