

OEA MEMBERSHIP DEPARTMENT

2022-2023

Monthly Membership Guide & Updates For Local Association Leaders

August 31, 2023

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:

- ⇒ 23-24 Local Treasurer's Handbook
- ⇒ Monthly Treasurer's Memos (past 12 months)
- ⇒ 23-24 Dues Rates and Pro-Rate Dues Tables
- ⇒ Forms for reconciliation
- ⇒ Membership Update form

InfoOEA HOURS:

Monday-Friday

8:30 AM-5:00 PM

The August 2023 billing statement is now available in the eBilling Portal, <https://ims.nea.org/ebilling/>. The most current roster is available on the eBilling portal and is accessible at any time. Please be sure to take time to thoroughly review your billing statement and membership roster in order to reconcile your membership information.

The new 23-24 Membership year began September 1, 2023. Therefore the "Current Year" referenced within the eBilling Portal is the 2023-2024 Membership year and is automatically opened. The 22-23 Membership year (now considered the "Prior Year") is located on the "Prior Year" tab at the top of the page. 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" tab. Please be sure to review both tabs to confirm you have nothing pending for the past 2022-2023 year. If you are paying online, please use the "Pay" button within the tab where the amount is due (Prior Year or Current Year).

Join Now Online Enrollment

Access 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. **Be sure these enrollments are provided to your payroll office.**

- **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 2023-2024 Enrollment Summary/Potential Count 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

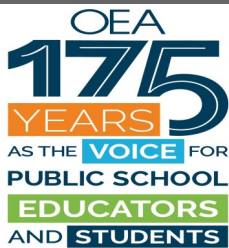
Continuous Roster with edits – if your local is a continuous local

eDues Roster with edits – if your local participates in eDues payments

Enrollment Summary/Potential Count Form

23-24 Dues Transmittal Agreement – if not already submitted

- The drop window for cancelling membership ended **August 31**. You are sent email notifications 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.)**



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 (844) 632-4636

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 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.
- If the determination is made to cancel the dues obligation, the membership department will reach out to you as the Treasurer to obtain the amount collected in dues prior to the date the OEA legal department has determined is the date to stop dues collections. If any dues were collected beyond this date, the local will need to reimburse the dues collected past the determination date.

Miscellaneous

- **Leave of Absence (LOA)** - During your membership drives for the 2023-2024 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 2022 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.