



NEA EARLY ENROLLMENT MEMBERSHIP INCENTIVE PLAN MEMBERSHIP PROCESSING PROCEDURES FOR EARLY ENROLLMENTS (EE)

The Processing Procedures are organized into five sections:

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1. DATES IN THE MEMBERSHIP SYSTEM

An Early Enrollee's membership *Enrollment* and *Start Dates* are **critical** elements that must be keyed/entered. These dates are used in providing information to the NEA Educators Employment Liability (EEL) Program insurance carrier and in determining if the individual is eligible for NEA EEL Program benefits.

A NEA EEL Program claim may be rendered invalid if the *Enrollment Date* is left blank on an early enrollment form. State, UniServ and Local association staff must ensure all new members (early enrollment or not) write in the date they sign the enrollment form **OR April 1 if the form is signed on March 31 or earlier.**

- a) Enrollment Date – membership staff should always **key the date the member signed the enrollment form** when processing an enrollment **UNLESS the form is signed on March 31 or earlier. In those cases, use APRIL 1 as the enrollment date.** If the *Enrollment Date* is not keyed and left blank, it will default to the *System Date*, which could disqualify an NEA EEL Program claim.
- b) Start Dates should be keyed at each membership level. If *Start Date* fields is left blank, they default to the *Enrollment Date* or 09/01/2019 if processed before September 1 in MOE or *System Date* in MEX. If both the membership *Enroll Date* and *Start Date* fields are left blank, the *Start Date* will default to the *System Date*. The *Start Date* for new members can never be less than September 1 of the corresponding membership year (i.e. 09/01/2019 for the 2019-20 membership year).

Example – a 2019-20 enrollment form is signed on May 20, 2019, and processed on May 31, 2019:

In MOE

- Key the Enrollment Date of 05/20/2019 otherwise the default will be the *System Date* (05/31/2019) which is incorrect.
- Start Dates will default to 09/01/2019, which is correct.

In MEX

- Key the Enrollment Date of 05/20/2019 otherwise the default will be the *System Date* (05/31/2019) which is incorrect.
- Key the Start Dates of 09/01/2019 otherwise the default will be the *System Date* (05/31/2019) which is incorrect and will cause the transaction to reject.

2. TRADITIONAL PAPER EARLY ENROLLMENT FOR PROCESSING

Beginning **April 1, 2019**, future year Early Enrollments (EE) can be added provided the state affiliate's 2019-20 membership system configurations are up-to-date.

Details:

Users may begin to process 2019-20 early enrollment memberships for first-time Active members and new Student recruits once their state is future year ready (**FY READY**).

The following checklist details the tasks state affiliates need to complete in order to be **FY READY** and begin enrolling EE Active and/or Student recruits.

Membership System Configuration Checklist:

Steps	Description
FYMPSET completed	This is the initial FYMP (Future Year Membership Processing) step. Ask your NEA Business Systems Support (BSS) contact to run this step. This process sets up the future year (FY) membership type & dues table by copying forward the current year (CY) data.
FY SEA & LEA membership type and dues are correct	Users must update the FY SEA and LEA membership type and dues in the Utility (UTL) subsystem. It is critical that FY dues are correct before allowing users to enroll FY members.
FY NEA dues reductions correct (<i>if applicable</i>)	All NEA dues reductions must be approved by the NEA Executive Committee and updated by NEA BSS.
AFF and EWL relationships are correct	Users must update changes to the Local Affiliate / Employer relationships in the Affiliates (AFF) and/or Employment and Work Location (EWL) subsystems.
FY FRS data is verified and correct	Users must update any changes to the 2019-20 Funds Receivable System (FRS) data, such as adding or ending Billable Parties.
FY READY field is set	There is a FY Ready indicator in the AFF subsystem for each state affiliate. It must be set before FY EE memberships can be added. Ask your NEA BSS contact to update this field otherwise it will be updated by the final FYMP rollover step (FYMPMULT).

Critical: Setting the **Early Enrollee** field in the MOE screen or in the MEX transaction **is important** for the EE Plan. The following are a few of its purposes:

- a) It is used for state affiliate reporting of total monthly EE Active and Student recruits (see "Early Enrollment Reporting" section).
- b) It is used to research possible EEL Program claims.
- c) It is passed on to NEA Member Benefits Corporation (MBC) for their use in marketing and providing qualified MBC programs to the early enrollee.

3. WEB ENABLED STUDENT ENROLLMENT (WESE) EARLY ENROLLMENT PROCESSING

March 15, 2019, is the deadline by which state affiliates should inform Zone Directors **AND** NEA of their intent to enroll new Student recruits during the early enrollment campaigns. This notification is crucial for NEA BSS staff to be able to properly set-up the WESE site for the April 1 early enrollment processing.

Beginning **April 1, 2019**, Student Early Enrollment recruits can begin enrolling using the WESE website, provided their state affiliate has completed the membership system configuration checklist and the state is future year ready (**FY READY**).

Details:

The WESE enrollment process identifies state affiliates that are participating in the EE Plan and determines if a Student web enrollee is eligible for the EE Plan.

When new Program recruits enroll through WESE, their data is added to the membership database and the Early Enrollee and Enroll/Renewal Date fields in their membership record are updated accordingly.

WESE rules for states participating in the NEA EE Program for new Student Recruits

Dates	State is FY Ready	State is not FY Ready
April 1 – August 31	Student is added as a 2019-20 member and is informed that he/she has been enrolled as a FY early enrollee. An explanation of the EE Plan and benefits is displayed.	A “not ready” message is presented informing new Student recruit that the state affiliate is an EE Plan participant and that the Student is eligible for the EE Plan. Message will instruct the prospective new Student recruit to contact the state affiliate directly in order to enroll in the EE Plan.

Note for Early Enrollment Participating States: WESE will check the membership database to confirm the enrollee is a first time member.

- If a current, past or future year NEA Student membership is found, the student is not eligible for the NEA Early Enrollee program.
- If a current year membership is found, the student will receive an “already enrolled” message and an option to renew for the upcoming membership year (2019-20).
- If a prior membership is found, the student can enroll for the remainder of the current year (2018-19) or for the future year (2019-20).

WESE rules for states NOT participating in the NEA EE Program for new Student Recruits

Dates	State is FY Ready	State is not FY Ready
April 1 – May 31	The student can enroll for the remainder of the current year (2018-19) or for the future year (2019-20).	A message is displayed informing the enrollee that the online registration process is not yet available for 2019-20 enrollments. It provides a link to the state association’s contact information.
June 1 – August 31	Student is added to the membership database as a 2019-20 member, but not in the NEA EE program.	A message is displayed informing the enrollee that the online registration process is not yet available for 2019-20 enrollments. It provides a link to the state association’s contact information.

4. ONLINE MEMBERSHIP ENROLLMENT (OLM) EARLY ENROLLMENT PROCESSING

This section pertains only to those states participating in the Online Membership Enrollment (OLM) program aimed at recruiting first-time NEA **Active** members.

March 15, 2019, is the deadline by which state affiliates should inform Zone Directors AND NEA of their intent to enroll first-time Active members during the early enrollment campaigns. This notification is crucial for NEA BSS staff to be able to properly set-up the OLM site for the April 1 early enrollment processing.

Beginning **April 1, 2019**, NEA Active Early Enrollment (EE) recruits can begin enrolling using the OLM web site, provided their state affiliate has completed the membership system configuration checklist and the state is **FY READY**.

Details:

Between the times **April 1 – May 31, 2019** the OLM website offers enrollments for one year, either the current year (2018-19) or the future year (2019-20). During this period the potential member does **not** have a choice of which year to join like WESE. State affiliates participating in the EE program must decide when to switch the OLM site from current year enrollments to future year enrollments.

The switch from current year to future year enrollments is controlled by the **EE Participating State OLM** indicator in the membership database. Please inform your NEA BSS contact when you want to make the switch between April 1 – May 31. If you do not request the switch, the OLM website will automatically switch to the future (2019-20) beginning June 1.

- When new Active recruits enroll for the future year through OLM, their 2019-20 data is added to the membership database and the Early Enrollee and Enroll/Renewal Date fields in their membership record are updated accordingly.

OLM rules for states participating in the NEA EE program for first-time Active members

Active Recruits Enroll Date	State is FY Ready	State is NOT FY Ready
April 1 – May 31	The EE OLM indicator is not set . The potential member can enroll in the current year (2018-19).	Enroll in the current year.
April 1 – May 31	The EE OLM indicator is set . The potential member can enroll in the future year (2019-20) as an early enrollee.	Enroll in the current year.
June 1 – August 31	The potential member can enroll in the future year (2019-20) as an early enrollee.	A “not ready” message is presented informing the first-time member that the state affiliate is an EE Plan participant. A message will instruct the prospective member to contact the state affiliate directly in order to enroll in the EE Plan.

OLM rules for states NOT participating in the NEA EE program for first-time Active members

Active Recruits Enroll Date	State is FY Ready	State is NOT FY Ready
April 1 – May 31	Enroll in the current year	Enroll in the current year.
June 1 – August 31	Enroll in the future year as a normal enrollee	A message is displayed informing the enrollee that the online registration process is not yet available for 2019-20 enrollments. It provides a link to the state association’s contact information.

5. EARLY ENROLLMENT REPORTING

It is recommended that State Affiliates using NEA’s membership system and participating in NEA’s 2019 EE Plan run reports monthly to monitor their EE plan members.

The following EE reports are available in the Membership Reporting and Analytics (MRA) reporting system:

- a. MORS1550 – Early Enrollees Membership Report (MRA Standard Membership report) – produces a roster of effective members that have the Early Enrollee indicator field set.
- b. MOCN3005 – Early Enrollment Monthly Count Report (MRA Standard Counts report) – provides counts by month within membership class (Active and Student) of effective members that have the Early Enrollee indicator field set.

Please refer to the ‘Reporting and Recordkeeping Requirements’ document for additional reporting and recordkeeping requirements. The full document with attachments is located on [InsideNEA](#) under: [Center/Depart](#) > [Business & Financial Services \(BFS\)](#) > [Membership Management](#) > [Policy and Dues](#) > [Early Enrollment](#)



Questions or clarification about membership processing and/or reporting for the Early Enrollment Membership Incentive Plan should be directed to your state affiliate’s NEA BSS contact.