

Internal Membership Dues Management Policy

Membership

The Association has six types of membership: Regular, Associate, Student, Honorary, Pharmacy Technician, and Lifetime. A description of these member categories are as follows:

Regular Members - Regular members shall be those persons who otherwise qualify as members in good standing and who are licensed pharmacists, entitled to practice pharmacy.

Associate Members - Associate members shall be those persons who otherwise qualify as members in good standing, and are interested in pharmacy or are associated with a business or profession related to the pharmaceutical profession. Associate members shall submit an application for membership and shall comply with such requirements as may be established by the Association and its Bylaws.

Student Members - Student members shall be those persons who otherwise qualify as members in good standing and are students in good standing, matriculated in a college or school of pharmacy.

Honorary Members - The Association may elect to honorary membership any person interested in pharmacy or its related sciences, at any annual meeting or special meeting of the Association called for such purpose.

Pharmacy Technicians - Pharmacy Technician members shall be those persons who assist licensed professional pharmacists in performing their professional duties as defined in F.S. 465. Pharmacy Technician members shall submit an application for membership and shall comply with such requirements as may be established by the association and its bylaws.

Lifetime Members - Current Association Regular members receiving the Florida Board of Pharmacy 50-year certificate shall receive Lifetime membership in the Association if they have been active FPA members at least 3 of the previous 5 years.

Qualifications

Any person may be admitted to membership of the Association provided that they can satisfy the above membership categories. This is accomplished by the submission of a membership application along with the payment of the applicable dues.

Certificates and Membership Card - A suitable certificate showing the member's name, membership classification and a membership card showing the term for which membership fee has been paid shall be furnished to all members. The membership card is available in the membership's online profile for downloading.

Annual Membership Fee

Due Date - The annual membership fee shall be due and payable on January 1 or July 1 of each calendar year depending upon which membership cycle that the applicant may be placed into.

January Billing Cycle Procedures - Initial dues invoices for the January billing cycle should be mailed the first week of October of the previous year. A first reminder notice should be mailed around the **15th of November** to those members due to renew for the January cycle but has not done so. Before dropping the list from the membership software of those who have not renewed their dues there needs

to be coordination and reconciliation between the accounting and membership records on a proper cutoff to ensure that paid up members are not receiving reminder notices. A final reminder notice for the January billing cycle should be mailed prior to **December 31st** of the previous year. Again there needs to be coordination and reconciliation between the accounting and membership records on a proper cutoff to ensure that paid up members from the initial and first reminder notice are not receiving the final notice. Membership records for those members who have not renewed by midnight, **December 31st** shall be inactivated. This includes ensuring that access to the members' only area of the web site is disabled and that the distribution list for the Stat News is updated. **Note:** Lifetime members should also receive a special customized letter along with an invitation to return their renewal form. Lifetime members do not pay dues however they may make a contribution to either to Committee of Continuous Existence or Florida Pharmacy Foundation. The purpose of returning the renewal form is to verify their contact information and desire to remain as an active Lifetime Member. Lifetime Members who do not return their renewal notices may be inactivated however at any time a request is received by the FPA office their records can be reinstated without cost. **NOTE: Members who have missed two or more dues renewal cycles may have their "member since" date changed to the current date when electing to rejoin the Florida Pharmacy Association. Members may retain their "member since" date by paying their past dues.**

Posting of Revenue for the January Billing Cycle – Dues renewal revenue deposited for the January billing cycle **prior to** January 1st shall be posted as pre-collected or "deferred" revenue. Dues renewal revenue received **after** January 1st but **before** March 30th shall be posted as revenue for the current year. Members who have been inactivated for the January billing cycle but paid their dues before March 30th are considered reinstated for the current January billing cycle. Members who have been inactivated for the January billing cycle but paid their dues after March 30th are considered reinstated and placed into the July billing cycle. Members who have missed an entire billing cycle or have been inactivated for more than 12 months are not reinstated but should be considered a new member. The "member since" date should be reset to the joined date for the new member.

July Billing Cycle Procedures - Initial dues invoices for the July billing cycle should be mailed the **first week of April**. A first reminder notice should be mailed around the **15th of May** to those members due to renew for the July cycle but has not done so. Before dropping the list from the membership software of those who have not renewed their dues there needs to be coordination and reconciliation between the accounting and membership records on a proper cutoff to ensure that paid up members are not receiving reminder notices. A final reminder notice for the July billing cycle should be mailed prior to **June 30th**. Again there needs to be coordination and reconciliation between the accounting and membership records on a proper cutoff to ensure that paid up members from the initial and first reminder notice are not receiving the final notice. Membership records for those members who have not renewed by **June 30th** shall be inactivated. This includes ensuring that access to the members' only area of the web site is disabled and that the distribution list for the Stat News is updated. Note: Lifetime members should also receive a special customized letter along with an invitation to return their renewal form. Lifetime members do not pay dues however they may make a contribution to either to Committee of Continuous Existence or Florida Pharmacy Foundation. The purpose of returning the renewal form is to verify their contact information and desire to remain as an active Lifetime Member. Lifetime Members who do not return their renewal notices may be inactivated however at any time a request is received by the FPA office their records can be reinstated without cost. **NOTE: Members who have missed two or more dues renewal cycles may have their "member since" date changed to the current date when electing to rejoin the Florida Pharmacy Association. Members may retain their "member since" date by paying their past dues.**

Posting of Revenue for the July Billing Cycle – Dues renewal revenue received and deposited for the July billing cycle prior to **September 30th** shall have one half (1/2) posted as pre-collected or “deferred” revenue. The other one half (1/2) of the dues received and deposited shall be posted in the appropriate membership revenue account lines. Members who paid their dues from the July billing cycle **after inactivation** but before September 30th shall be “reinstated” for the current July bill group. As indicated above those members who have been inactivated but “reinstated” to the current billing cycle shall have one half (1/2) of their dues received and deposited posted as pre-collected or “deferred” while the other one half (1/2) shall be posted in the appropriate membership revenue account lines. An effort should be made to send the July, August and September issues of Florida Pharmacy Today where appropriate for those members being reinstated for the July billing cycle. Dues renewal revenue received for the July billing cycle after September 30th shall have their billing period changed to the January cycle and shall have the entire amount posted as revenue for the next calendar year beginning with January. Members who have missed an entire billing cycle or have been inactivated for more than 12 months are not reinstated but should be considered a new member. The “member since” date should be reset to the joined date for the new member.

New Members Joining between January through March – Individuals who are seeking membership in the FPA and elect to join between January 1st and March 31st should be placed into the current January dues cycle with an expiration date of December 31st of that year. This includes former members of the FPA who have been inactivated more than 12 months. Every effort should be made to send to them by mail any back issues of Florida Pharmacy Today covering the months of January, February and March where applicable. This can be accomplished by either mailing any extra issues in the FPA office or referring the new member to the FPA web site where journals are archived. All dues collected from new members during this period will be posted into the appropriate membership accounts and booked as revenue for the current year.

New Members Joining between April through June – Individuals who are seeking initial membership in the FPA and elect to join between April 1st through June 30th should be placed in the pending July billing cycle with an expiration date of June 30th of the next year. This includes former members of the FPA who have been inactivated more than 12 months. There is no need to send back issues of Florida Pharmacy Today to these applicants. One half (1/2) of the dues collected during this period where the “new” member is placed into the July billing cycle shall be posted in the appropriate membership accounts and booked as revenue for the current year. The other one half (1/2) of the dues received from new members between April through June shall be posted as pre-collected or “deferred” revenue for the next calendar year.

New Members Joining between July through September - Individuals who are seeking membership in the FPA and elect to join between July 1st through September 30th should be placed into the current July dues cycle with an expiration date of June 30th of the next calendar year. This includes former members of the FPA who have been inactivated more than 12 months. Every effort should be made to send to them by mail any back issues of Florida Pharmacy Today covering the months of July, August and September where applicable. This can be accomplished by either mailing any extra issues in the FPA office or referring the new member to the FPA web site where journals are archived. One half (1/2) of the dues collected during this period where the “new” member is placed into the July billing cycle shall be posted in the appropriate membership accounts and booked as revenue for the current year. The other one half (1/2) of the dues received from new members between April through June shall be posted as pre-collected or “deferred” revenue for the next calendar year.

New Members Joining between October and December – Individuals who are seeking membership in the FPA and elect to join between October 1st and December 31st should be placed into the January billing cycle of the next calendar year with an expiration of December 31st of that year. Dues revenue deposited for the January billing cycle prior to January 1st for **new members** shall be posted as pre-collected or “deferred” revenue.

Transferring of Deferred Revenue – All dues that had been posted as pre-collected or “deferred” shall be swept from the liability accounts and transferred to the appropriate dues revenue account line before the end of January of each year.

Membership Dues

The dues for Regular Members (licensed pharmacists entitled to practice pharmacy) shall be **\$195.00**

The dues for Regular Associate Members (those persons who otherwise qualify as members in good standing, and are interested in pharmacy or are associated with a business or profession related to the pharmaceutical profession) shall be **\$195.00**.

The dues for Associate Pharmacy Technician Members (persons employed as supportive pharmacy personnel) shall be **\$30.00**.

The dues for Undergraduate Students (persons who are matriculating full time in a college or school of pharmacy) shall be **\$20.00**. These dues will cover the student membership for all 4 years of their college training.

The dues for Retired Pharmacists (persons who qualify as regular members but who work less than 40 hours per month as determined by FPA staff) shall be **\$97.50**.

The dues for Joint Membership (those persons who are regular members and whose spouse also elects to become a Regular Member of the Florida Pharmacy Association) shall be **\$292.50**. **Annual membership is provided to both the Regular Member and the Spouse and the individual member records are linked.**

The dues for New Practitioners (recent graduates) following graduation from pharmacy school shall be **\$97.50** for the first year out of school. After the first year as a recent graduate member the dues will change to the regular member rate of \$195. There is a transitional membership option created where students in pharmacy school may elect to prepay their first year recent graduate membership at the end of their P3 professional year. This option will provide the graduating pharmacy student 18 months of post graduate FPA membership for the price of a 12 month recent graduate membership which is already discounted at 50%. FPA leadership will visit each of the pharmacy school campuses to explain and offer this special discount. Students who elect to not take advantage of the recent graduate membership option at the end of the P3 year will only be provided the standard 12 month recent graduate member rate of \$97.50.

The dues for Honorary or Lifetime members shall be waived. **Note: The Association may elect to honorary membership any person interested in pharmacy or its related sciences, at any annual meeting or special meeting of the Association called for such purpose. Current Association Regular members receiving the Florida Board of Pharmacy 50-year certificate shall receive Lifetime membership in the Association.**

Grace Period - Any member not paying their annual dues within ninety (90) days after the due date shall have their services discontinued until said annual dues are paid in full. During times of national military service, established members shall have no less than a six (6) month grace period upon return to civilian status to pay their annual dues. Such members shall retain all rights and privileges of membership during the service and grace periods.

Nonmembers Who Elect to Join at FPA Conferences – The Florida Pharmacy Association offers many continuing education programs and services for both pharmacists and pharmacy technicians. Members who register for these programs are entitled to a substantial discount. The price differences for members and nonmembers are published in the marketing brochure and also on the FPA web site. Meeting registrants that are nonmembers will automatically be able to register at the member discounted rate. Those who elect to remain nonmembers will sign up at the nonmember rate with a notation of their nonmember status printed on their name badges. This gives an opportunity for our members and or FPA leadership to invite these nonmembers to join the FPA.

To take advantage of the member rate the meeting participant must become a member of the FPA during the registration process. This includes both advance registration and also for on-site registration. Onsite registration options, including the nonmember and member rates, will be provided to the meeting registrant by FPA staff. If a nonmember meeting registrant elects to sign up for a meeting as a member **after** their registration has been presented, FPA staff will issue a voucher for a discount that can be used towards a future FPA meeting. The voucher will have an expiration date of 1 year.

Automatic Annual Renewal – Members who wish to have their dues automatically renewed annually may do so however this feature is only available for those who pay their dues with a credit card. Invoices are created within our member management system drafting the credit card information provided on an annual basis until the member dues invoices are paid in full. Those members whose credit card will expire prior to the invoice being paid in full will be contacted by FPA staff for the updated credit card information. Members electing to pay their dues using this service will need to agree to the full amount of the dues to be paid annually and cannot suspend payments that are due. If expired credit card information is not provided, the card is declined by the merchant processor or if the member elects to sever their relationship with the FPA then their member account status will be changed to “expired” and their account changed to “suspended” status. All member services will end on the first past due date. This program is replacing the monthly membership installment program as ordered by the Board of Directors at the March 17, 2019 Board meeting. The annual automatic membership renewal program will be made available for Regular and Associate Members paying \$195 annually for their dues. Also members electing to use the annual automatic renewal program will have the same membership fee as members who have not elected to auto renew. Below are our member installment guide procedures for our membership management software.

Member Management

Auto Renewal Guide

Membership Dues Auto Renewal

How do I setup a Membership to allow for auto renewal?

The auto-renewal feature of a membership allows for automatic payments for members. The system will automatically charge the member at the beginning of each membership term. When a membership allows for auto-renewal and the member pays for their membership dues using credit card or ACH/E-check as the payment option, they will be enrolled into auto-renewal. They will also be enrolled if an admin processes a payment to the dues invoice on the backend of the site using a credit card. There is not an opt-in/opt-out feature available at this time. The site must be configured with a real-time payment processor to have the auto-renewal function available.

To enable auto-renewal, navigate to the Ecommerce Menu Tab. From the left menu, select Dues & Memberships followed by Memberships. You can create a new membership or edit an existing. Within the membership settings, toggle "Yes" within the field "Auto Renew." Save your changes.

NOTE: if using ACH payments, the payment must be made on the frontend of the site for members to be enrolled in automatic billing.

After paying their current dues transaction, an invoice for the next scheduled payment will be created. The invoice date will be dated in the future. The invoice status will be "Open (Awaiting Auto-Bill)." The member will be automatically charged for the scheduled dues payment on the specified date.

The member will not be notified they are enrolled in auto-renewal. There is not an option for the member to opt-in or opt-out of the auto-renewal feature during the initial transaction. The member is automatically enrolled when they pay via credit card or ACH/e-check via the frontend of the site or the admin pays the invoice via credit card on their behalf on the backend of the site.

If the member does not want to participate in the automatic billing, they can delete the invoice via the member profile or an admin can delete the invoice via the back-end of the site.

NOTE: Auto-renew should not be used in conjunction with renewal rules, which upgrade a member's member type and/or membership during renewal. The auto-renew feature does not obey renewal rules and will instead create new "Open (Awaiting Auto-Bill)" invoices for the current membership on the member's account.

NOTE: If a member uses a promo code for the registration or renewal of a membership, the promo code will only be applied to the initial invoices. All recurring invoices will be created at full price.

NOTE: Auto-renew and monthly payment programs will not work together. You need to enable the "Auto Renew" option within the Membership configuration settings. To change these settings, please select "Ecommerce" from the top main menu and select "Dues & Membership" from the left navigation and then select "Memberships" from the "Dues & Membership" drop down in the left navigation.

Next to the Membership, select the "Edit" icon represented by the pencil graphic. Locate the "Auto Renew?" field, and select "Yes.". Select "Save" to save your changes.

Auto Renew? ?

- No (members will need to renew manually)
- Yes (members paying via e-check or credit-card will be automatically re-billed until cancelled)

Once this setting is saved, when a member is registering/renewing, they will have the option to pay in full or select the auto renew program.

If a member pays by credit card the annual dues payment will be automatically charged on the member due date so long as the credit card is still valid and current.

Are there any changes in the QuickBooks accounting system?

There should be no changes in the way the current dues are processed within the accounting system. There will also be a new task added to the FPA accounting office to contact those members whose credit cards have expired. It is anticipated that there will be a small decrease in credit card transaction fees given that we have retired the monthly dues management program. For members selecting the auto renew option there will be an annual transaction that is automated where the member's credit card will be drafted each year. This will continue until either the member elects to discontinue auto renew, the credit card fails to process or FPA staff disables the option at the request of the member.

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