IMS

Employers &

Work Locations

User Guide

Financial & Membership Services
Membership Management Services
Version 072011

NATIONAL EDUCATION ASSOCIATION
nea.org

Great Public Schools for Every Student

Table of Contents

INTRODUCTION

The Employer/Work Location (EWL) subsystem maintains and describes the organizations that are of interest to the NEA affiliates, but are not an NEA organization. Employers consist of School Districts and Higher Education Institutions that employ our members. In addition there are Other types of institutions that are not associated with a school district or higher education institution, but may sponsor educational instruction. Work Locations identify the sites at which our members work, such as an elementary school, a bus barn, a higher education campus, etc. The organizations in the EWL subsystem are "external organizations" as they are external to the association family.

The EWL subsystem includes office related data as well as the identification of key individuals within the organizations. It describes their roles, both current and historical. It also describes the organization relationships and dependencies (e.g., school buildings within school districts, a sub-contractor working in a school district) and relationships with our affiliates (e.g., employer relationship with locals or chapters).

The EWL module also displays current data on membership numbers, Geo-Political data for certain Work Locations, information on schools governed by a charter, U.S. and State Department of Education unique identification numbers, and other miscellaneous information such as payroll data, organization type, location type, etc.

External organizations as used in the EWL Subsystem are described below.

Organization	Sub Record Type	Description
Employer	Charter School	Charter schools are primary or secondary schools that receive public money (and like other schools, may also receive private donations) but are not subject to some of the rules, regulations, and statutes that apply to other public schools in exchange for some type of accountability for producing certain results, which are set forth in each school's charter. Charter schools are opened and attended by choice. While charter schools provide an alternative to other public schools, they are part of the public education system and are not allowed to charge tuition and are governed by a charter.
	Higher Education Institution	Any accredited post secondary institution, including two- and four-year colleges, universities and trade schools.
	Other	Institutions not associated with a school district or higher education institution but may sponsor educational instruction. Examples include hospitals, job corps camp, detention centers, and prisons.
	Pre-School	Preschool education is the provision of education for children before the commencement of statutory and obligatory education, usually between the ages of zero or three and five, depending on the jurisdiction.
	School District	A school district is a legally separate body corporate and politic. School districts are local governments with powers similar to that of a city or a county including taxation and eminent domain, except in Virginia, whose

		school divisions have no taxing authority and must depend on another local government (county, city, or town) for funding. Its governing body, which is typically elected by direct popular vote but may be appointed by other governmental officials, is called a school board, board of trustees, board of education, school committee, or the like. This body appoints a superintendent, usually an experienced public school administrator, to function as the district's chief executive for carrying out day-to-day decisions and policy implementations.
	Sub-Contractor	A private company hired by a public school district to perform specific services, such as cafeteria, maintenance or transportation duties
Work Location	Building	A building can either be associated to an employer or to a campus and is the location where members are assigned to report to work. Examples of location types include bus barn, school building, field house, garage, office, or a particular building on a higher education campus
	Campus	A campus is associated to higher education employers and is the principal grounds on which the buildings of a college or university are situated.

The diagram below illustrates the Employer to Work Location relationship and illustrates the way an employer can be associated to a local association or to a chapter within a local.
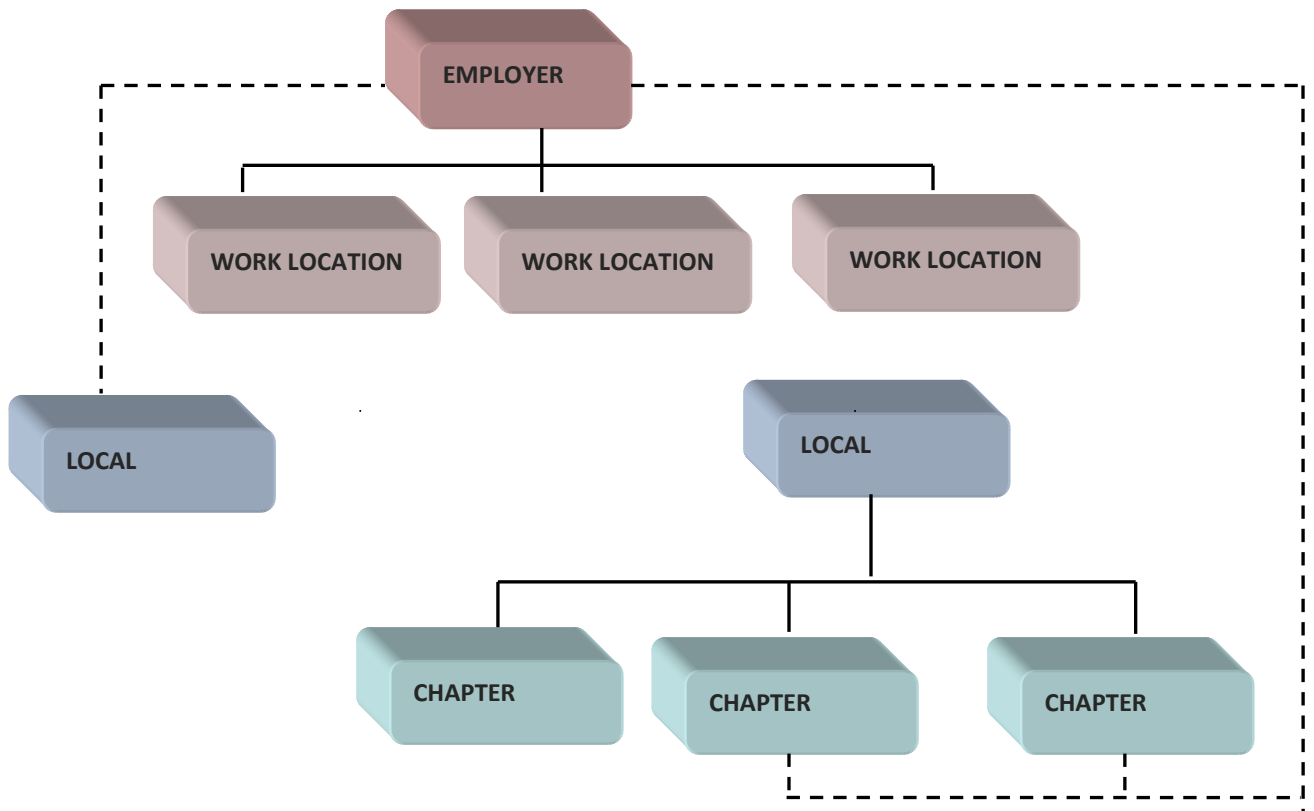
To access the EWL subsystem, click Ext Org from the IMS Welcome page.
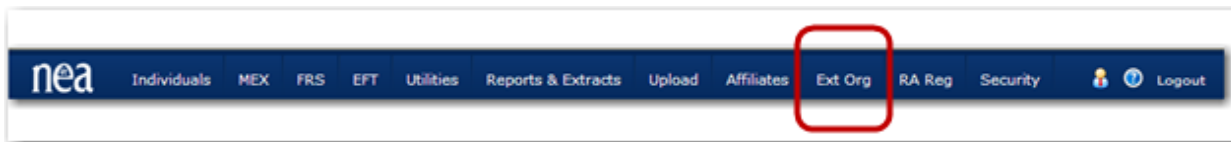
You are presented with the External Organizations landing page that includes the Employers & Work Locations and Other Organizations function, which is explained in the Other Organizations User Guide.


There are two functions for EWL: Maintain and Hierarchy.

The *Maintain Employers & Work Locations* function allows you to view and update data for employers and work locations within your security access. Clicking the Maintain button initiates the Employer/Work Location Search page. Once you have searched for and selected an organization, you are presented with the EWL Profile main page, which is the main hub from which an employer or work location record is maintained.

The *EWL Hierarchy* function is still under development. The intent of this page will allow you to view the organizational structure and relationships under the Geographic State.

MAINTAIN EMPLOYERS & WORK LOCATIONS
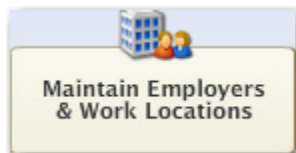
Click [Maintain Employers & Work Locations] to access the Maintain Employers & Work Locations function.

The Search page is displayed. You have to first Search for an organization.

	Description
Org ID	The ten digit system generated Internal Organization identifier. Leading zeroes are not required. This is the most direct method of searching for an organization. No other criteria are needed if using the Org ID.
Org Name	The name of the organization for the search. Enter a complete or partial name. The wild card % can be used at the end of the partial name but it is not required.
User ID	User assigned identifier for an organization. Can be alpha/numeric.
Geo State	The geographic state associated to the user's login id. Except for NEA users, it will be populated and cannot be changed.
Parent Org	Optionally select the employer for the search.
Record Type	Optionally select the type of organization for the search. The selection is employer or work location.

Sub Record Type	Optionally select the sub record type of the organization for the search. This can be used when Record Type has been selected.
	
	Employer selection choices include:
	    Charter School
	    Higher Education Institution
	    Other
	    School District
	    Subcontractor
	
	Work Location selection choices include:
	    Building
	    Campus

NCES School Dist. ID	Unique 7-digit identifying number assigned to public school districts through the U.S. Department of Education National Center for Education Statistics (NCES). The first two digits identify the state and the last five digits identify the district.
IPEDS ID	Unique identifying number assigned to postsecondary institutions surveyed through the U.S. Department of Education Integrated Postsecondary Education Data System (IPEDS).
State Agency Education ID	Unique identification number assigned to public school districts through a state's department of education agency.

Some examples of search parameters are:

- Organization ID

- Partial Organization name and Record type

- User ID and Record type. Employer user ids are unique within Geographical State and Work Location user ids are unique within Employer. Using a user id without a record type may give you odd results.

- Organization partial name, record type = Work Location, Parent Organization search for the Employer.

PARENT ORGANIZATION SEARCH

The Parent Organization search may be used when searching for a work location under an employer. It is used when adding a new work location to EWL.

Organization Search

| Org ID: | | Org Name: | |
| Geo State ID: | VA - Virginia | Record Type: | Employer |

Search   Reset

Description	
Org ID	The ten digit system internal organization identifier. Leading zeroes are not required
Org Name	The name or the parent organization. Enter a full or partial name
Geo State	The geographic state of the user. Populated from the search page
Record type	Record type of the parent organization is Employer.

SEARCH RESULTS

The Search Results grid displays organizations based on the search criteria. Double click in a row to select an organization.

Excel   Double click on the row to select an Affiliate   Total Rows 20

Org ID	User ID	Organization Name	Record Type	Sub Record Type	Gen Level	Parent Org Id	Parent Org
0000223969	5020	BASS-HOOVER ELEM.	WL	BLDG	PK-12	0000223963	FREDERICK CNTY PUBLIC S
0000224170	1040	BASSETT HIGH	WL	BLDG	PK-12	0000224169	HENRY CNTY PUBLIC SCHL
0000223389	5100330	BATH CNTY PUBLIC SCHLS	EMP	SCDT	PK-12		
0000223390	1010	BATH COUNTY HIGH	WL	BLDG	PK-12	0000223389	BATH CNTY PUBLIC SCHLS
0000224947	5000	BATTLEFIELD ELEM.	WL	BLDG	PK-12	0000224941	SPOTSYLVANIA CNTY PUE
0005619355	1120	BATTLEFIELD HIGH SCHOOL	WL	BLDG		0000224631	PRINCE WILLIAM CNTY PUE

EMPLOYERS & WORK LOCATIONS MAIN PAGE

The main EWL page is divided into three sections. The top section displays the name, IDs, and contact information, such as primary address, primary telephone number, and primary e-mail address. If the organization is a work location, the associated employer will be displayed. The Additional Data on the lower right side will change depending on the organization.

The bottom left side displays the current role assignments. The bottom right displays current member counts. The counts shown are dependent on the level of user. For NEA users, NEA counts are displayed for the organization. For SEA users, State counts are displayed for the organization.

Tabs go across the page for Demographics, Roles, Notes, related organizational Assignments, and Counts.

A task panel on the left side allows users to add a new organization and edit the organization on the page (additional data, address, phone and email).

DEMOGRAPHICS

The Demographics tab allows users to view and maintain custom data created specifically for the use of the employer or work location. The data shown on this page will vary based on the options utilized by the SEA. Please contact your SEA membership office for processing instructions.
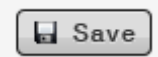
NOTES

Text can be entered in the notes page.

1. Click [New] .

2. Enter a SummAry.

3. Enter the text in the Notes area and then click [Save] .

ROLES

The Roles tab allows users to view and maintain role assignments which originate from an Employer or Work Location. The role assignments are displayed from the EWL perspective. At the top of the page a grid displays role assignments for the organization in alphabetic sequence by Role name.

As you click in different rows in the grid, the data displayed at the bottom of the page will change to match.

To view historical role assignments for the organization, click the ☑ Historical box.
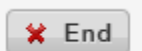
| Description	
Individual ID and Name	The ten digit individual identifier and the name of the individual assigned to the role.
Role Name	The standard name of the role
Alt Role Name	Alternate Role Name. Use this field if the standard role name's intent must not change but the standard role name does not accurately reflect the role. Example: the standard role name is "Superintendent of Schools". The role is actually an interim position. Use the Alternate Role Name to identify the role as: "Interim Superintendent of Schools".

Start Date	The date the role assignment commences. Start Date defaults to the current system date. You may enter a *future* Start Date if needed. Example: it is July and you are entering the Superintendent whose term begins in September. You would enter a future start date of 09/01/YYYY
End Date	The date the role assignment ends. A future End Date may be entered if the date is known in advance when the term of the role will end.

Address Owner	Identifies the entity which owns the address used in the role assignment. User selects the address to be used to contact the person on matters relating to this role. The default value is "Individual". Required.
	
	Choices are an address owned by:
	    the Individual,
	    the Originating Organization
	    the person's Work Location recorded in his/her membership record
	    the Represented Organization.
	
	The choice "No Address" is selected if an address does not need to be associated to the role assignment.

Address Type	The type of address to be selected. If Address Owner = Individual, the selection includes only addresses owned by the individual in the role. For any other address owner, the Primary address is automatically selected; the Address Type selection is empty.
Address	Display of the selected address. View only.

Phone Owner	Identifies the entity which owns the telephone number used in the role assignment. User selects the telephone number to be used to contact the person on matters relating to this role. The default value is "Individual".
	
	Choices are a phone number owned by:
	    the Individual,
	    the Originating Organization
	    the member's Work Location recorded in his/her membership record
	    the Represented Organization.

Phone Type	The type and phone number to be selected. If Phone Owner = Individual, the selection includes only phone numbers owned by the individual in the role. For any other phone owner, the Primary phone number is automatically selected; the Phone Type selection is empty.

Email Owner	Identifies the entity which owns the email address used in the role assignment. User selects the email address to be used to contact the member on matters relating to this role. The default value is "Individual".
	
	Choices are an email address owned by:
	    the Individual,
	    the Originating Organization
	    the member's Work Location recorded in his/her membership record
	    the Represented Organization.

Email Type	The type and email address to be selected. If Email Owner = Individual, the selection includes only email addresses owned by the individual in the role.

For any other Email owner, the Primary email address is automatically selected; the Email Type selection is empty. |
Represented Org	Left blank – not applicable to employer or work location roles.
Default Role	Original intent was for use in label printing. If individual has multiple roles, the one marked as the Default is used for the label address. May no longer be needed.
VIP Role	Indicator set in SEA's Organization Available Roles (OAR) on Very Important Position roles. Not editable.
Reset	When clicked the Reset will set the page back to the original condition.
Save	When clicked saves the data to the database.
New	When clicked initiate a new role assignment page.
End	When clicked will initiate the End Role function.

Refer to the Roles Processing User Guide for instructions on adding and maintaining role assignments.

ASSIGNMENTS

The Assignments page enables the user to view all relationships between organizations, such as an employer to a local affiliate and/or chapter and with its work locations.
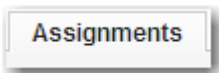
Click the **Assignments** tab to initiate the Assignments page.

UID: 5100330 - BATH CNTY PUBLIC SCHLS (VA) 0000223389

| Main | Demographics | Roles | Notes | Assignments | Counts |

○ Local ○ Chapter ○ WorkLoc ⦿ View All   Excel   ☐ Historical

Related Org ID	Related Org Name	Related Org User Ic	Related Rec Type	Relation Type	Start Date	End Date
0000019961	BATH CO EDUC ASSN	0120	LOC	LOCEMP	11/05/1997	
0000223390	BATH COUNTY HIGH	1010	WL	EMPBLDG	11/03/1997	
0000726591	CENTRAL SCHOOL ADMIN	0010	WL	EMPBLDG	05/14/1998	
0000223391	MILLBORO ELEM.	5010	WL	EMPBLDG	11/03/1997	
0000223392	VALLEY ELEM.	5020	WL	EMPBLDG	11/03/1997	

◼ For an employer, the Assignment page displays all associated relationships to locals, chapters and work

locations.

◾ For a work location, the Assignment page displays the associated relationship with its parent organization, the employer.
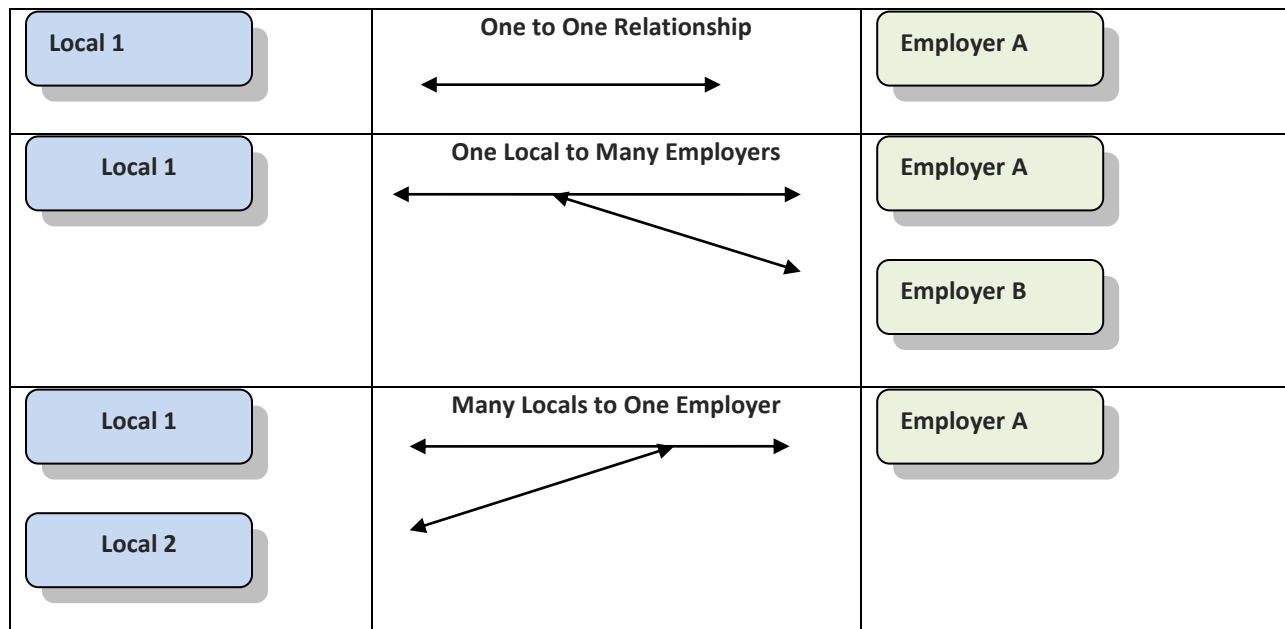
ASSIGN EMPLOYER TO LOCAL OR CHAPTER

The Employer–Local or Employer–Chapter assignments maintain the relationship between a local/chapter and the employer of the association's members. The employer is usually associated to the local organization; however, if the local has chapters, the state affiliate may decide to assign the employer to the chapters instead. The choice of assigning the employer to a chapter or a local is defined under the **Local Additional Info** page in the Affiliates subsystem. If the local association has Active membership types, at least one employer must be assigned. Multiple employers may be assigned to the local/chapter.

Web Enabled Student Enrollment (WESE) states must have higher education institution employer assignments to their Student Locals and can only have either a "one-to-one" or a "many locals to one employer" relationship and not a "one local-to-many employers" relationship.

If more than one employer is assigned to a local, one of the employers is identified as the default employer. The user can change the default to another employer/subcontractor as appropriate. The 'default" employer is the first one displayed when processing membership employment.
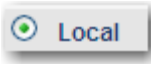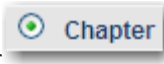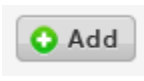
Local-Employer Relationship

Local 1	One to One Relationship	Employer A
Local 1	One Local to Many Employers	Employer A Employer B
Local 1 Local 2	Many Locals to One Employer	Employer A

A D D   E M P L O Y E R   –   L O C A L   O R   C H A P T E R   A S S I G N M E N T
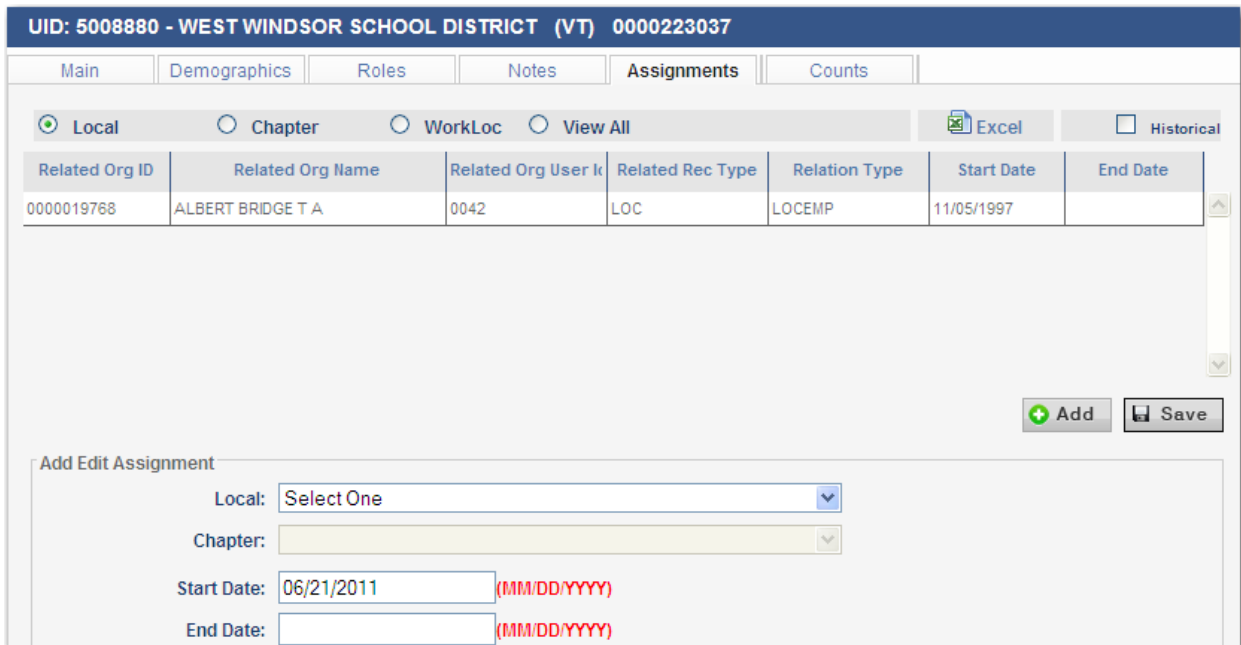
You may need to add an employer assignment to a newly created local or chapter.

1. Navigate to the employer Assignments tab.

2. Click the radio button of the affiliate, either ⊙ Local or ⊙ Chapter , that needs an employer assignment.

3. Click ⊕ Add

The example below is an **Employer-to-Local** Assignment:

UID: 5008880 - WEST WINDSOR SCHOOL DISTRICT (VT) 0000223037						
Main	Demographics	Roles	Notes	**Assignments**	Counts	

⊙ Local   ○ Chapter   ○ WorkLoc   ○ View All   Excel   ☐ Historical

Related Org ID	Related Org Name	Related Org User Id	Related Rec Type	Relation Type	Start Date	End Date
0000019768	ALBERT BRIDGE T A	0042	LOC	LOCEMP	11/05/1997	

⊕ Add   💾 Save

Add Edit Assignment

Local: Select One ▾

Chapter: ▾

Start Date: 06/21/2011 (MM/DD/YYYY)

End Date: (MM/DD/YYYY)

4. Select Local from drop-down list

5. Click 💾 Save to save the assignment.

6. Confirmation message is displayed.

7. Click OK to save.

The example below is an **Employer-to-Chapter** Assignment:

1. Select Local from drop-down list.

2. Select the Chapter from the drop-down list.

3. Click [Save] to save the assignment.

4. Confirmation message is displayed.

5. Click OK to save.

END EMPLOYER–LOCAL OR EMPLOYER–CHAPTER ASSIGNMENT

When there are multiple affiliates assigned to an employer, there may come a time when you need to end one of the assignments.

Related Org ID	Related Org Name	Related Org User Id	Related Rec Type	Relation Type	Start Date	End Date
0004429247	ALTOONA BUS DRIVERS	3018	CHAP	CHAPEMP	06/28/2000	
0004429253	ALTOONA CLERICAL	3019	CHAP	CHAPEMP	06/28/2000	
0004429243	ALTOONA CUSTODIANS	3017	CHAP	CHAPEMP	06/28/2000	
0005938455	ALTOONA EDUC ASSN	20921	CHAP	CHAPEMP	07/13/2005	

UID: 5500270 - ALTOONA SCH DIST (WI) 0000228592 — Main | Demographics | Roles | Notes | **Assignments** | Counts — ○ Local ⊙ Chapter ○ WorkLoc ○ View All — Excel — ☐ Historical

1. Focus on the affiliate that needs to be ended by clicking in the row, note the associated data appears in the assignment fields below.

Add Edit Assignment

Related Org: 0004429253   ALTOONA CLERICAL
Start Date: 06/28/2000   (MM/DD/YYYY)
End Date: (MM/DD/YYYY)

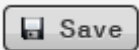2. Enter an End Date in MM/DD/YYYY format. This can be a current or past date.

Add Edit Assignment

Related Org: 0004429253   ALTOONA CLERICAL
Start Date: 06/28/2000   (MM/DD/YYYY)
End Date: 08/31/2010   (MM/DD/YYYY)

3. Click [Save].

4. The Employer-Affiliate assignment is ended.

COUNTS

Membership counts are provided in various ways for external organizations. Counts are updated nightly, on Monday through Friday business days. They may increase or decrease, based on the memberships processed during the day. Effective memberships are included, cancelled memberships are excluded.

Click the **Counts** tab to initiate the Counts page.

Description	
Display Counts by Class, Sub Class, Mbrship Type	Set the radio button on your choice of display. Counts can be shown summarized at the Class level, summarized by Sub Class or shown by the detail membership type.
Filter By	The choices in the Filter selection change based on the Display Counts option selected. The filter shows all Classes, or all Subclasses or all detail membership types for the organization. When a filter is selected the counts displayed on the page reflect the choice.
Mshp Year	The Membership Year. Choices are Current, Prior or Future years
Mshp Level	Membership Level. Organization choices are: NEA, SEA or LEA.

Type Count	The type of counts which are available to be displayed.
	▪ General counts: the number of members per membership type/Subclass/or Class
	▪ Funds: counts by Class/Sub Class/membership type for one fund selected from the list. Under development.
	▪ Demographics: counts by Class/Sub Class/membership type for one demographic selected from the list. (Age, Gender, Ethnicity, Position, Level, Subject). Under development.
	▪ Other: counts by Class/Sub Class/membership type for payment method or membership continuity. Under development.
Count By	The selection list is dependent on the Type of Counts requested, Funds, Demographics or Other. Under development.
Additional Criteria	Under development.
🔍 Search	When clicked, initiates the search.

To view counts for an organization:

1. Select a Membership Year.

2. Select a Membership Level.

3. Select a Type of Count and Count By, if applicable.

4. Choose a Display Counts By and a Filter, if applicable.

5. Click 🔍 Search .

6. The requested counts are displayed.

ADD AN ORGANIZATION

To add a new organization, such as an employer or work location to the EWL Subsystem, click either the Add Organization link on the Task Panel on the EWL Main page or the NEW button on the Employer/Work Local Search page.
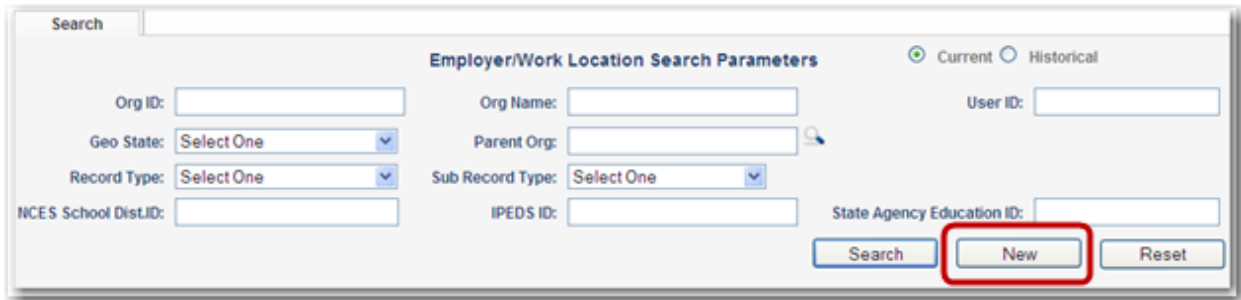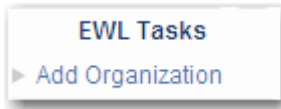

The Add Organization pop up appears.
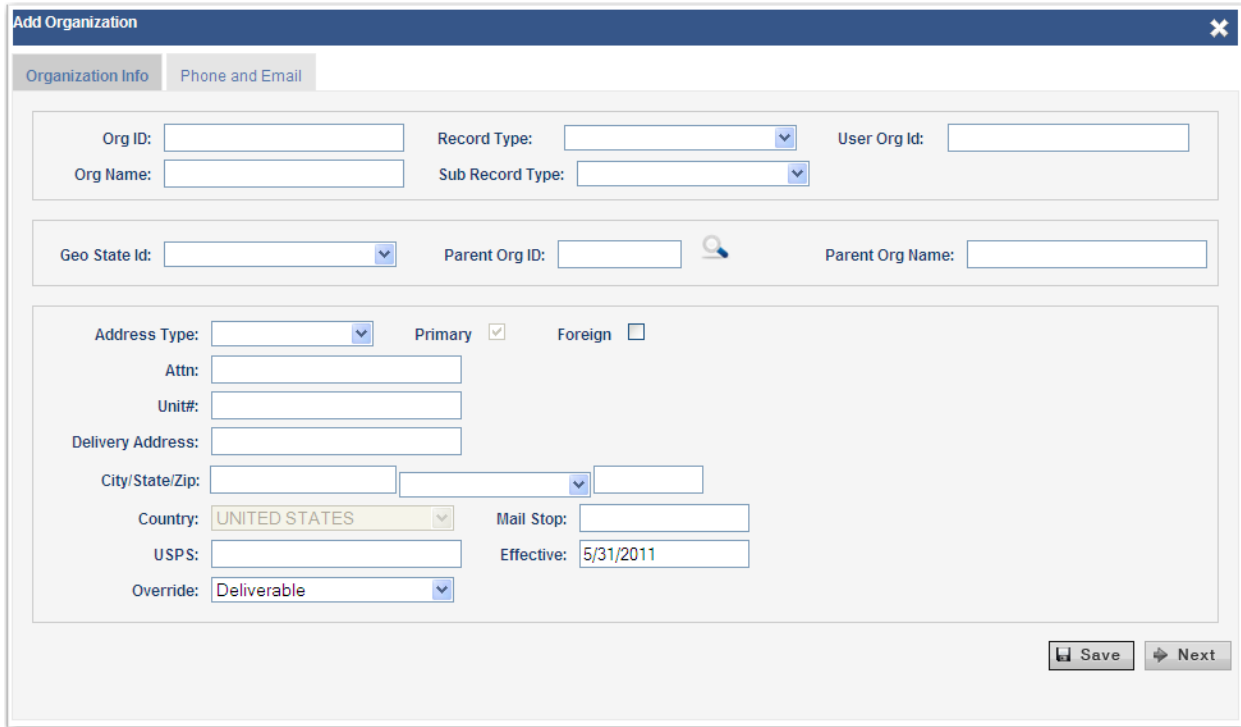
Description	
Org ID	The ten digit system generated internal identifier for the organization. Populated after new organization is saved.
Record Type	Required. Identifies the type of organization being added.

User Org ID	Required. User assigned identifier. Up to 10 digits, alpha/numeric. Must be unique for organizations within the same record type per state affiliate.
Org Name	Required. The official name of the organization.
Sub Record Type	Required. Identifies whether the work location is a Building or Campus. Identifies the type of employer and automatically assigns the General Level. Choices are: Charter School (General Level PK-12) Higher Education Institution (General Level HEDN) Other (General Level Other) Pre-School (General Level PK-12) Sub-Contractor (General Level dependent upon Parent Org Employer). Under development. Contact NEA. New School Districts (General Level PK-12) employers cannot be added. Contact NEA.
Geo State ID	Populated with the geographic state id of the user's login access. Non editable.
Parent Org	Required when adding a new work location or sub-contractor. The parent organization will always be an employer. Employers do not have parent organizations. If a work location has members employed by more than one employer, then two work locations will need to be added, one for each employer.
Parent Org Name	Non editable. Populated after the parent organization is selected.
Level Id	Required when adding a new work location. Identifies the grade level of the work location.
Address Elements	See the Edit Address section in this User Guide for an explanation of the data fields.
Phone and Email	See the Edit Phone and Email section in this User Guide for an explanation of the data fields.

Steps to add the organization:

1. Select the Record type.

2. Enter a User Id.

3. Enter the new organization's name.

4. Select the sub record type.

5. The Geo State ID will be populated for most users based on their login. NEA users must select a Geographic state.
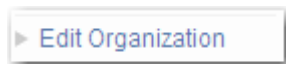
6. If creating a new work location, select its Parent Organization (employer).

7. If creating a new work location, select Level Id (grade level).

8. The address is optional. The address can be added after the organization has been created.

9. Click [Save].
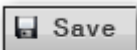
The organization is saved in the database. Note the Organization ID is populated.

Click the [View Profile] link to access the new organization's main page or click [Edit Organization] task on the main page. See Edit Organization section in this User Guide for detailed instructions.

EDIT AN ORGANIZATION

To edit the User ID or name of the organization, click ▶ Edit Organization from the Task Panel. The Edit Organization pop up is presented.

Description	
User ID	Identifier assigned by the user, Alpha numeric, up to ten digits
Organization Name	The official name of the organization.
Abbreviation	An abbreviated form of the name can be initials.
Report Name	The name as it should print on reports. .
NCES School District ID	Unique 7-digit identifying number assigned to public school districts through the U.S. Department of Education National Center for Education Statistics (NCES). The first two digits identify the state and the last five digits identify the district.
NCES Building ID	The 5-digit identifying number assigned to public elementary/secondary schools through the U.S. Department of Education National Center for Education Statistics (NCES). When combined with the NCES School District ID, the two codes comprise a unique 12 digit code for each school. The first 7 digits of the 12 digit school ID are the district ID, and the last five are the school ID.

IPEDS ID	Unique identifying number assigned to postsecondary institutions surveyed through the U.S. Department of Education Integrated Postsecondary Education Data System (IPEDS).
State Education Agency ID	Unique identifying number assigned to public school districts through a state's department of education agency.
Gen Level Code	Non editable. Automatically populated
Sub Record Type	Employer only.
Compensation School Dist Id	School District employer only. NEA Research NCA system-assigned id.
Std # of Payroll Deduction	Employer only. The maximum number of payroll deductions of the employer and is used to populate the MOE payroll deductions field.
Org Governance	Employer only. Defines whether the governing body is appointed or elected. For example, is the school board for a school district elected or appointed?
Locale	School District employer only. U.S. Department of Education classification to describe a school district.
Other Institute Type	Other employer only. Choices include: Bureau of Indian Affairs Agency, County Correctional Facility, Federal Correctional Facility, State Correctional Facility, Private School, etc.
Payroll Slot Count:	Employer only. Number of available deduction fields in an employer's payroll system.
Org Type	Employer only. Defines whether the employer is a private or public institution.
Level	Required. Work location only. Identifies the grade level of the work location.
Location Type	Work location only. Identifies whether the work location is a building, bus barn, office, etc.
Generic AR	Work local only. No longer used. Formerly used to print generic labels for association representatives with work location name and address.

ACTV

To edit an organization:

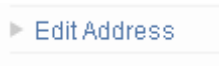1. Enter the desired data in the applicable field(s) or select from the drop-down list.

2. Click [Save]

ENDING AN ORGANIZATION

Neither an employer nor a work location can be ended. They can either be closed or merged through a Server Process. Notification is given to NEA and only the NEA will be responsible for the actual merging or closing of EWL records.
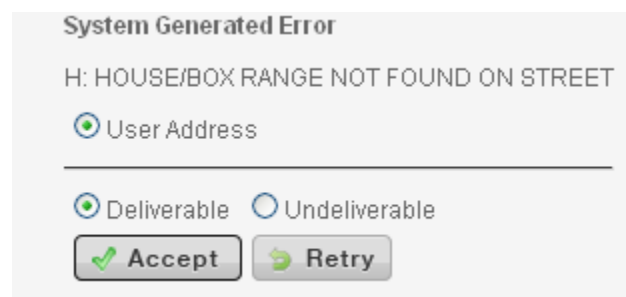
EDIT ADDRESS

An organization may have multiple addresses, one per Address type. One address is marked as the Primary Address which is displayed on the EWL Profile main page.

Edit the address by clicking the link on the task panel ▶ Edit Address .

Information Regarding Address Processing

- All addresses entered into the system are validated against the USPS database.
  The **USPS** (US Postal Service) field indicates whether the address passes validation (Deliverable), or fails due to an invalid house number, invalid street name, etc. You cannot change the USPS value.

- **Override** indicates whether the address is good for mailing; it can be changed.

- A bad USPS value may be associated with an Override = Deliverable, as in the case of street addresses in a brand new subdivision that have not been updated into the USPS database.

- On the other hand, a good USPS value may be associated with an Override = Undeliverable, if a mail piece was returned by the post office because the member had moved away without a forwarding address.

- When a new address fails USPS validation, an error message will appear, such as the one below:

- → The default is **Retry**. Correct the address if you have made an error.

- → Select **Accept Deliverable** if you believe the input address is good and should be selected for mailings. The Override field will change to *Deliverable*.

- → Select **Accept Undeliverable** if you believe the address you have is not good and should not be selected for mailings. The address will be stored in the database and the Override field will change to *Undeliverable*.

Description	
Address Type	Defines the type of address for the address entered. Only one address per type is allowed.
Primary	Indicates the main address. Only one address per affiliate may have the primary indicator. The primary address displays on the affiliates main page.
Legal	Work location only. Indicates the address for the Capital Technologies Group (CTG) vendor database updates for Geo-Political data.
Foreign	Indicates this is a non USA address.
Attn	Information line which includes "in care of" or "Attention". Leave blank if not needed.
Unit #	Non street information such as PO Box Number, apartment, Unit Number or Floor. Leave blank if not needed.
Delivery Address	The street address.
City/State/Zip	The city, state abbreviation and zip code plus 4.
Country	If the zip code is entered United States is populated. Otherwise select from the list.
Mail Stop	Optional use for Local organizations. Identifies where the mail is to be delivered within the organization. The use of this field is for organizations whose mail is received in a central mailing room and then forwarded on to their "mail stop" location for delivery to its final destination.

USPS	The **USPS** (US Postal Service) field indicates whether the address passes validation (Deliverable), or fails due to an invalid house number, invalid street name, etc. Non editable.

	D -- Deliverable
	     A -- -Invalid Apt suite unit
	     B -- insufficient address
	     H -- invalid House /box number
	     M -- multiple match
	     S -- invalid street
	     U -- User Overridden
	     Z -- invalid zip
	     X -- expired database

Override	Indicates whether the address is good for mailing. Choices are Deliverable or Non Deliverable. Used if organization has moved to a new address but the address is not known.

CHANGE OF ADDRESS

Focus on the address in the grid.

1. Enter the data to be changed, for example a new unit number, street address, zip code, or Override value.

2. Click

3. The Address Validation appears.
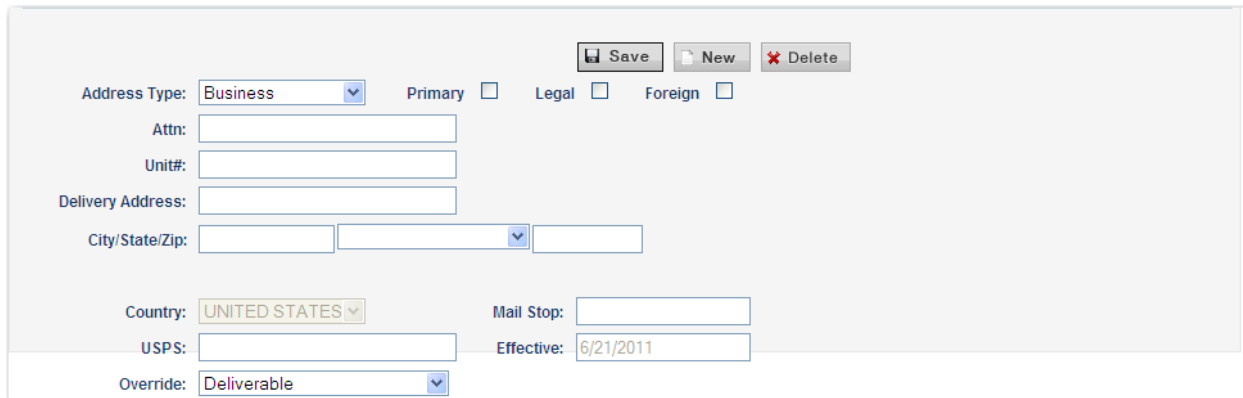
4. Click **✓ Accept** if the address is correct.

5. Click **↩ Retry** if you need to reenter some part of the address.

ADD AN ADDRESS

1. Click **New** . Blank address fields appear.

	Save	New	Delete

Address Type: Business   Primary ☐   Legal ☐   Foreign ☐
Attn:
Unit#:
Delivery Address:
City/State/Zip:

Country: UNITED STATES   Mail Stop:
USPS: Effective: 6/21/2011
Override: Deliverable

2. Enter the required address elements. Select an Address Type not in use.

3. Click **Save** .

4. After the Address Validation appears, click **✓ Accept** or **↩ Retry** to renter the data.

DELETE AN ADDRESS

1. Focus on the address in the grid.

2. Click **✗ Delete** .

EDIT PHONE AND EMAIL

To add or edit a phone number or an email address, click the link on the task panel ▸ Edit Phone & Email .

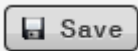| Description	
Phone Type	Defines the type of phone number for the number in the phone number field: Business, Business 2, Business 3, Other, Toll Free, FAX. One phone number per type is allowed.
Phone Number	The ten digit numeric telephone number
Primary	Indicates the main phone number. Only one phone number per affiliate may have the primary indicator. The primary phone number displays on the affiliates main page.
Foreign	Indicates this is a non USA telephone number.
Unlisted	Indicates the number is private and not listed in the telephone directory.
Comment	A free form text field for comments.
Email Type	Defines the type of email address for the address in the Email address field: Business, Other

Email address	The Email address. Format: name@domain.suffix • The **@** sign and **.** (dot) are required. • *name* and *domain* can be any number of valid characters. Acceptable characters are a-z, 0-9, dot or period (**.**), single italic (**'**), hyphen (**-**), or underscore (**_**). Invalid characters (such as ! # $ % ? space etc.) are accepted by IMS but will be removed upon updating the database. • The *suffix* (the part that follows the last dot) must have two characters (such as those denoting a country: us, ca, uk, au, etc.), or must match one of these values: com, edu, gov, org, biz, int, mil, net, pro, aero, arpa, coop, info, name, nato, museum. Otherwise you will receive an error message.
Primary	Indicates the main email address. Only one email address per affiliate may have the primary indicator. The Primary email address displays on the affiliate's main page.
Source	The source of the data.
Comment	A free form text field for comments

ADD/UPDATE AN EMAIL ADDRESS

1. Select the phone type

2. Enter the email address in the required format.

3. Set the Primary indicator on one email address.

4. Select the source

5. Optionally, enter a comment.

6. Click [💾 Save] .

To remove an email address, delete the email address from the field, click [💾 Save] .

GEO-POLITICAL

Legislative District codes are assigned to work location addresses flagged as 'legal.' PO Box addresses are accepted as a legal address; however, users are <u>discouraged</u> from using PO boxes as legal addresses because of the high potential for errors when buildings do not reside in the same district as the post office where their PO Box is located. The data is view only.

Legislative District codes are obtained from a vendor, Capitol Technology Group (CTG), and are voting district identifiers based on ZIP or ZIP+4 and include:

- **US Congressional Districts** are legislatively defined subdivisions of a State for the purpose of electing representatives to the U.S. Senate (Senators) or delegates (Congressman) to the U.S. House of Representatives of the United States Congress. The Senate has equal representatives (2) from each state. The proportion of representatives in the House of Representatives, by contrast, depended on the population of the State.

- **State Senate District and State House Districts** are legislatively defined subdivisions of a State for the purpose of electing **representatives** (State Senators) or delegates (State Congressman) to the State House of Representatives of the State Congress. They are responsible for making laws that relate to state matters.

- **Federal Information Processing Standards Codes (FIPS codes)** are a standardized set of numeric or alphabetic codes issued by the National Institute of Standards and Technology (NIST) to ensure uniform identification of geographic entities **through** all federal government agencies.

- **School District Codes** available through this update are those assigned by the National Center for Education Statistics (NCES). These districts may be identified at three levels: High, Middle, and Elementary or, if all three levels are combined, these districts will be identified as Unified. NCES no longer uses Middle School District codes.

To view Geo-Political information, click the link on the work location task panel .

The Geo-Political pop up is presented. To close, click the in the top right corner.

Geo-Political Information for a Work Location

Description	
Elementary	Elementary school district code
Middle	No longer used
High	High school district code
Unified	Unified school district code (combines both elementary and high school)
County Name	Residential County Name
Tract	Census data provided by Group 1 software
Census Block	Census data provided by Group 1 software
Cong Dist	2-digit US Congressional District Code
St Senate Dist	3-digit State Senate District
St House Dist	3-digit State House District
St Cd	2-digit FIPS State Code
County	3-digit FIPS County Code
Precinct	No longer provided by NEA
Ward	No longer provided by NEA
Address Type	Defines the type of address for the address entered. Only one address per type is allowed. Address type values for Organizations include: Business, Business 2, Business 3, Other, Shipping, User for Billing
Attn	Information line that includes "in care of" or "Attention".
Unit	Non-street information such as PO Box number, apartment, suite, unit or floor.
Delivery Address	The street address
City/State/Zip	The city/state abbreviation and zip code plus 4.