

INTERACTIVE MEMBERSHIP SERVICES (IMS)

Frequently Asked Questions (IMS V5.2.0)

How do I access the Interactive Membership Services (IMS) application?

The URL for IMS is <https://ims.nea.org/ims>. All changes applied using this URL will update the production I&A database.

Access to IMS is granted to those who complete, sign, and submit an IMS security form. Your State Security Administrator (SSA) must also sign the form and mail or scan/email it to Kavita Rangarajan (krangarajan@nea.org) Once we have received it, the SSA will be notified of your access status within three business days.

What are the browser recommendations to run the Interactive Membership Services (IMS) application?

IMS can be accessed from any of the following browsers:



Microsoft Internet Explorer



Firefox

In order to achieve maximum performance, we recommend the following.

- Internet Explorer (IE 8)
 - To check your browser version – go to Help / About Internet Explorer (on your browser).
 - If you upgrade from Internet Explorer version 7 to Internet Explorer version 8, remove the compatibility mode. [See below for the steps on how to remove the compatibility mode.](#)
- Firefox 3.0 or higher
- High speed internet connection.
- Periodically clear the browser cache :

Cache contains a kind of travel record of the items you have seen, heard, or downloaded from the Web, including images, sounds, Web pages and cookies. Typically these items are stored in the Temporary Internet Files folder. All the files stored in your cache take up space so periodically you need to clear out the files stored in your cache to free up some space on your computer. This is called clearing the cache. Not clearing your cache can create problems when using IMS or any web application. Be sure to clear your cache at least once a month. [See below for the steps how to clear the cache.](#)

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What is the recommended Desktop Configuration?

Desktop

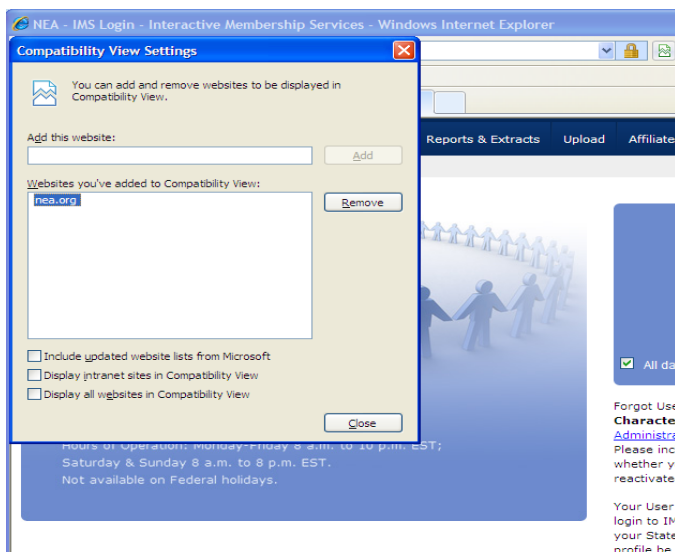
- Intel Pentium dual core (or equivalent)
- 2GB RAM
- 1024 x 768 Resolution (or higher)

Steps to remove the compatibility mode in Internet Explorer version 8:

1. Click *Tools* menu item from Internet Explorer. Note: If you do not see the menu bar in your browser window, press F10 and the menu bar will appear.
2. Select *Compatibility View Settings* from the drop down as illustrated below.

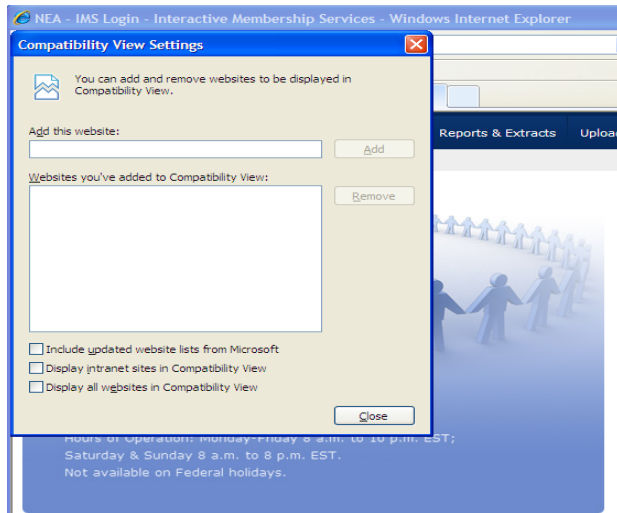


3. In the *Websites you've added to Compatibility View* field, you may see **nea.org** as illustrated below.
4. If you see nea.org in that field, highlight nea.org and click the Remove Button.



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5. The Website (nea.org) will now be removed from the Compatibility View.

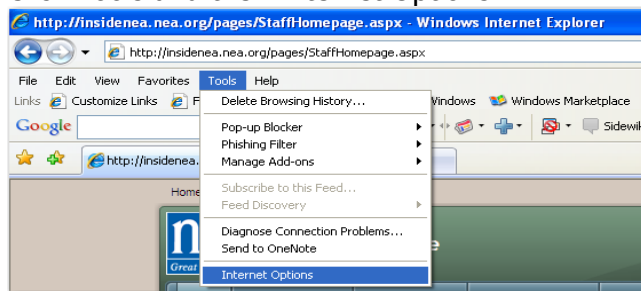


6. Click the Close button.

The next time you visit the Nea.org websites, the site will automatically be displayed without backward compatibility.

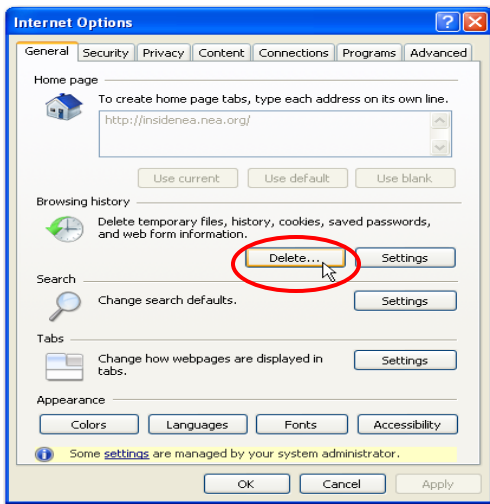
Steps to clear the IE browser cache:

1. Click Tools and then Internet Options.



2. On the General tab under Internet Options, click on the Delete button under Browsing History.

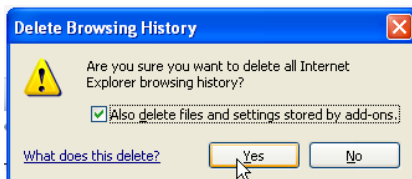
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3. On Delete Browsing History, click on Delete All or optionally you may delete **“Temporary Internet Files”**, **“Cookies”** and **“Form Data”** by clicking the individual delete buttons.



4. Respond to the question, “Are you sure you want to delete all Internet Explorer browsing history?” with a click on Yes.

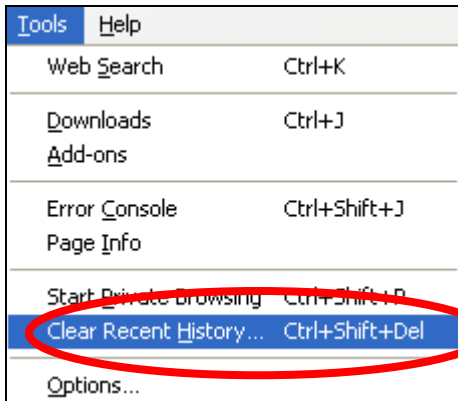


5. The popup will close after deleting the cached history information. Click Ok to close out of Internet Options.

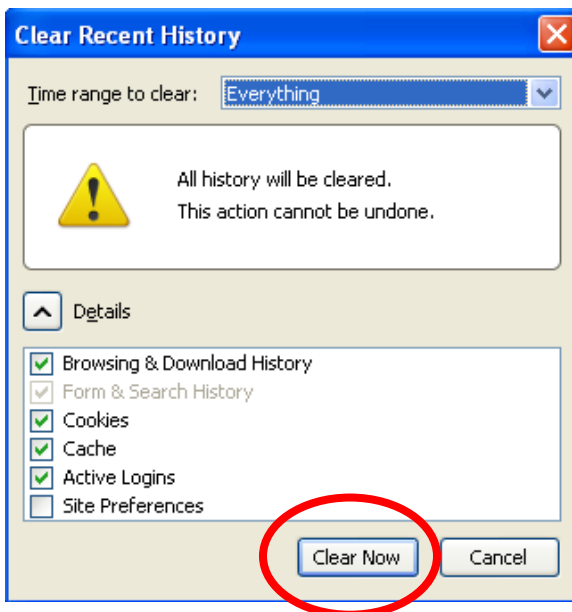
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Steps to clear the FIREFOX Browser Cache

1. Click Tools and then Clear Recent History.



2. Under Clear Recent History, select 'Everything' from *Time range to clear* field. Click the Clear Now button.



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What is I&A?

The main membership processing system at NEA is known as the Individuals and Affiliates System - I&A. I&A consists of a set of online, batch and reporting applications, as well as a database to store member information. The IMS web application reads data from the I&A database, follows the business rules of I&A, and stores information in the I&A database.

What is the Individual ID (also referred to as Member ID)?

The 10-digit NEA Individual ID is a unique identification number for an individual in the I&A system. This ID can be found on the address label of the *NEA Today* or may be found on the membership card.

What hours is the IMS system available?

IMS is available 8:00 a.m. to 10:15 p.m. EST, Monday through Friday, and 8:00 a.m. to 10:15 p.m. EST, Saturday and Sunday. IMS will be unavailable on Federal holidays. Occasionally IMS will be down on a Sunday for computer maintenance.

Do I need any special software to use the IMS application?

The IMS application should work on any browser. The first time you try to use the "Affiliate Profile" functionality, you may be asked to download the "Java Plug-in." Follow the prompts on the screen to download Java. This should take less than a minute, and will allow you to use all of the features within Affiliate Profile.

In addition, if you use the "extract" or "download" feature of the application to obtain a list of members, you may need Microsoft Excel.

Staff who use the I&A System use software called CITRIX to access it. Citrix is NOT required to access IMS.

Is it safe and secure to view and access member data over the internet?

Our software implements Secure Sockets Layer (SSL), the industry standard and among the best software available today for secure online transactions. It **encrypts all personal information** including name, address, and ID so that it cannot be read as the information travels over the Internet. Only the last four digits of the SSN (if it exists in I&A) are displayed on the IMS Profile web pages and output (via download or extracts).

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Why do I have to log back into IMS?

IMS is a web-based application that can be accessed from any browser. We built in extra security to protect members' data. After 1 hour of idle time, the session is logged out if you are a user outside of the NEA Network. If you are within the NEA Network, you have 'All day access'. This is a feature that allows you to remain logged on to IMS for an entire day even with no activity. The All Day Access feature is **only** available to users within the NEA network.

Note: When you clear the cache on your browser, the All day access and Subsystem preferences will be lost and you will have to reestablish them.

I have an IMS Userid & Password, but I am not able to login

If a user does not access IMS at least once in 3 months, the user profile is disabled. The state security administrator must request reactivation.

What data can I view and update?

As an authorized user, you have permission to:

- View and Update personal and demographic information
- View and Update membership and obligation data
- View and Update employment (employer, work location, position, subject) data
- View and Update role assignment information
- View Affiliate Profile information: affiliate name, address, phone, roles, counts, demographic data, member types and dues for the selected organization
- View Employer Work Location information: Organization Name, Address, Phone, Roles, Counts and Demographic Data.
- View and Update Funds Receivables transactions: Receipts, Disbursements, Obligation Adjustments and Penalties.

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- View Funds Receivables Account information: Billable Party's Year to Date Obligation, Receipts Paid, Billing Status, Adjustments to Obligation, Counts of Members and corresponding Obligation and Penalties.
- View and Update Billable Party information: Contact Information, Transmittal Schedule, Funds Exclusion and Notes.
- View Funds Receivables Affiliate Summary information: Balances, Counts and Disbursements.
- View and Update Funds Receivables Processing Controls: Maintain Billing Schedule, Define Payment Categories, Maintain Fund Exclusions and Maintain Funds Aging.
- View and Update Server reports: Submit a report, view the status of the report, preview, print and copy the report.

Access to member data is based on your IMS security profile. For example a state user can only access members within his or her state; a UniServ user can only access members within his or her UniServ; and a local user can only access members within his or her local.

Your ability to only view data or to process enrollments/updates depends on your security profile. The types of access: Inquiry Only or Individual Maintenance. Subsystems functionality access available: Membership Enrollment, Membership Maintenance, Advanced Obligation Adjustment, Extract, Labels/Rosters, Upload Verification, Upload Commit and FRS Inquiry.

Your ability to view/update the Social Security Number, SSN4 (last 4 digits of the Social Security Number), birth date or birth year depends on your Sensitive Data Security access. Full Access allows you to see the above mentioned sensitive data; Partial Access allows you to see SSN4 and birth year.

Audit procedures are in place to track the application (IMS) and user that update the data.

How do I find a single member to view and update member profile information?

Click on the **Individuals** tab on the top navigation bar. Select the **Individual** tab. Enter the required data (Individual ID, SSN or name).

To search by name, enter both the first name and last name. The wildcard character (%) can be used. For example, to look for all S. Smith's, enter S% and Smith, or S% and Smit%. The match is not case sensitive; name can be entered in upper or lower case. You can select the individual's state of residence if known.

How can I view a list of members to verify and update their profiles?

Click on the **Individuals** tab on the top navigation bar. Select the **Affiliate** tab. On the Search screen, you must select down to at least the UniServ level and then click the **Submit** button. A list of members will appear. Click on the Individual ID link (in the first column) to bring up that individual. When you are finished with a record, click on the **Back** button to return to the list to select another individual.

If you have Extract security privilege, you can save this as a PC file by clicking on the link **CSV** or **BAR**. You can also select the **Extract** tab on the top navigation bar. Refer to the User Guides for additional information.

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How can I find general information (address, phone, officers etc.) for the state, UniServ, local, chapter, employer or work location?

Rest your mouse pointer on the **Affiliates** tab on the top navigation bar and click on **Profile**. To expand or collapse to a different level within the Affiliates structure, click on the round icon in front of an organization. To access a work location, expand the local level, then employer and then work location. Once you have located an organization, click on the **Get Profile** button.

You can also "hyperlink" to an organization profile from within the member's Profile Summary. For example, in the membership section, click on the link **Local: FAIRFAX E A** to view the local profile.

How do I process an enrollment online? How do I change a member's address?

You can find information on processing updates and more in one of the eight User Guides. These are found under the HELP menu on the top of the IMS Welcome page.

Will a *member* be able to enroll online?

IMS is designed for use by association staff. The "Join NEA" application (<http://www.nea.org/JoinNea>) can be used as a membership recruitment tool. Potential members can also access this link from the www.nea.org web site.

How does the Extract feature work?

Access to Extracts and Upload are controlled via security. The Extract feature allows you to utilize selection criteria to produce standard extracts containing individual, geopolitical, and membership data for download to your PC. Extract files are provided in ten standard extract formats. After downloading to your PC, the standard extract file can then be imported into Excel, formatted, and printed. Refer to the Extract User Guide for more information.

You can also download a Membership Quick Enroll Template for keying enrollments and uploading the membership data to be applied to the I&A database.

How does the Upload feature work?

The Upload feature allows you to modify data on standard extracts produced out of IMS, upload the changes to I&A, and apply the updates to individual, geopolitical, and work detail (work location, subject, position) information in I&A. The Membership Extract (containing membership data) and the Roles Extract are not available for upload.

The upload of membership enrollments is available by downloading the Membership Quick Enroll Template from Extract Form, importing the template to Excel, keying the enrollment information on the template, and then uploading the enrollment file to apply the membership information to I&A.

Explain the Upload Mapping Setups for ACCESS?

States using ACCESS for the production of membership cards will now be able to upload information on the files sent by ACCESS and update information on I&A. The ACCESS files

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contain updates made by members to the ACCESS website including: address, phone and email updates. Before uploading the information, review the file and correct any erroneous data found on the file. Be sure to work with your NEA Membership Contact the first time you use the feature. See the Upload Users Guide for more information on using this new feature.

What if I do not need to change anything on the profile?

Simply use one of the underlined breadcrumbs to navigate back to a prior page or select a different function, or close the browser. Changes are not applied until the submit button is clicked. Use of the **Back** button is discouraged in most situations because of inconsistent results.

Where do I find more information on how to use IMS?

Click on the *Help* menu and select one of the User Guides.

Where do I submit suggestions or ask questions about this application?

You may submit and we welcome your comments and questions at imsSupport@nea.org. Please refer to the User Guides for more detailed information about IMS.

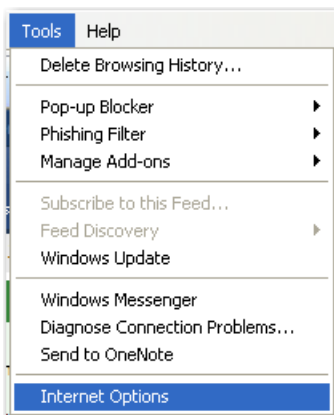
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Server Reports

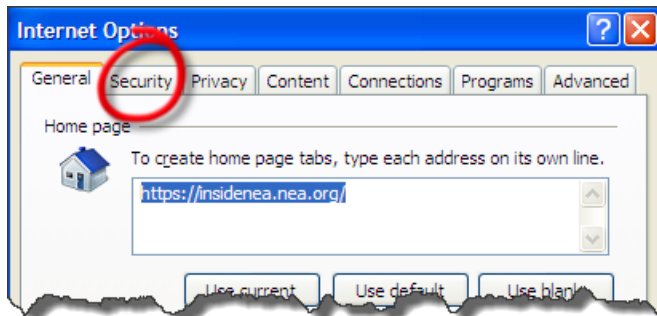
My copy option (To download a Server report) is not working. I do not get the option to Open/save. Which settings should I check to enable report downloads?

If you are unable to download server report generated files using Internet Explorer, please follow these instructions to update the settings in the Internet Explorer.

- **Step 1:** In Internet Explorer, click **Tools**, and then click **Internet Options**.

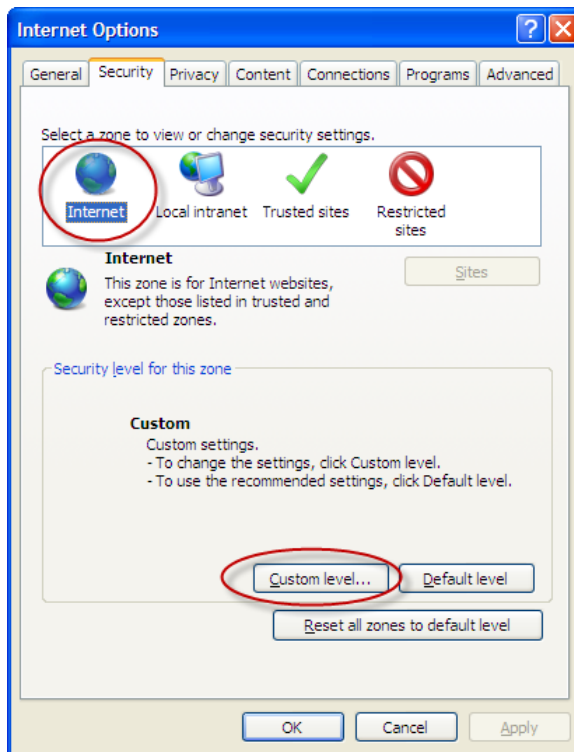


- **Step 2:** Click the **Security** tab.

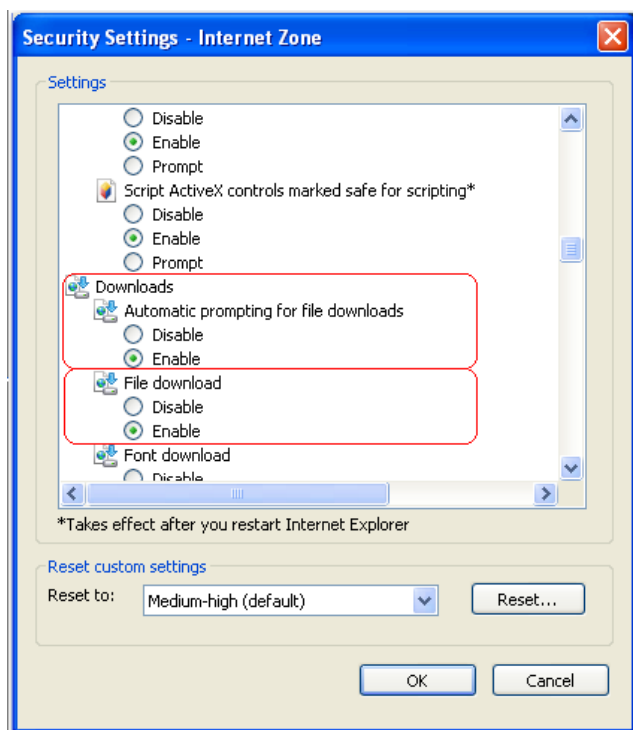


- **Step 3:** Select "**Internet**" zone from the "Select a zone to view or change security settings" section shown below.

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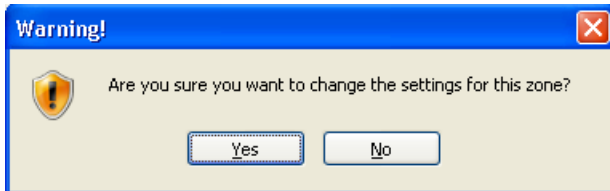


- **Step 4:** Under **Security level for this zone**, click **Custom Level**.
- **Step 5:** Look for **"Downloads"** section and locate the **"Automatic Prompting for File Downloads"** and **"File download"**. Select **"Enable"** radio button for these two options and click **OK** to close the window.

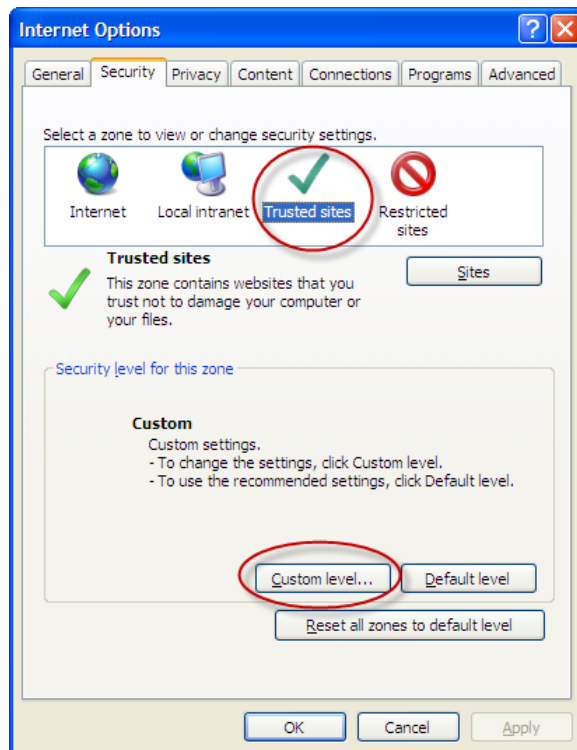


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- **Step 6:** Click **Yes** to save the settings when a warning popup appears as shown below.



- **Step 7:** Click **Apply** if enabled in the "Internet Options" window.
- **Step 8:** Now repeat the **steps 4 to 7** by selecting "**Trusted Sites**" as shown below.

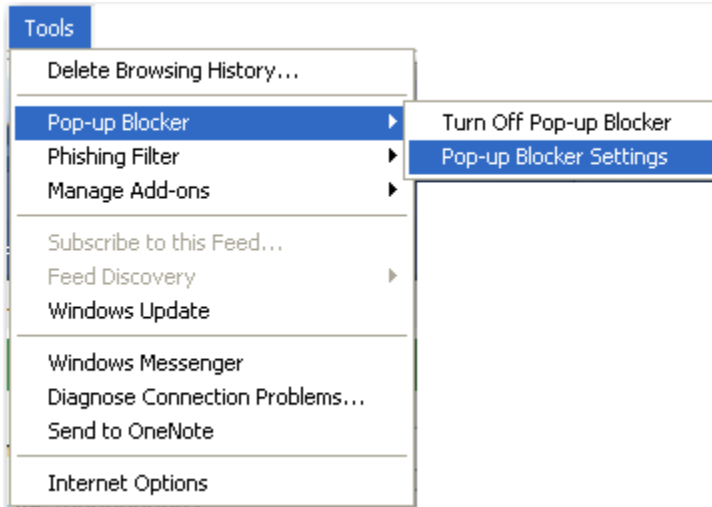


- Click **OK** to close the Internet window.
- Now try copying the job output files to your local drive

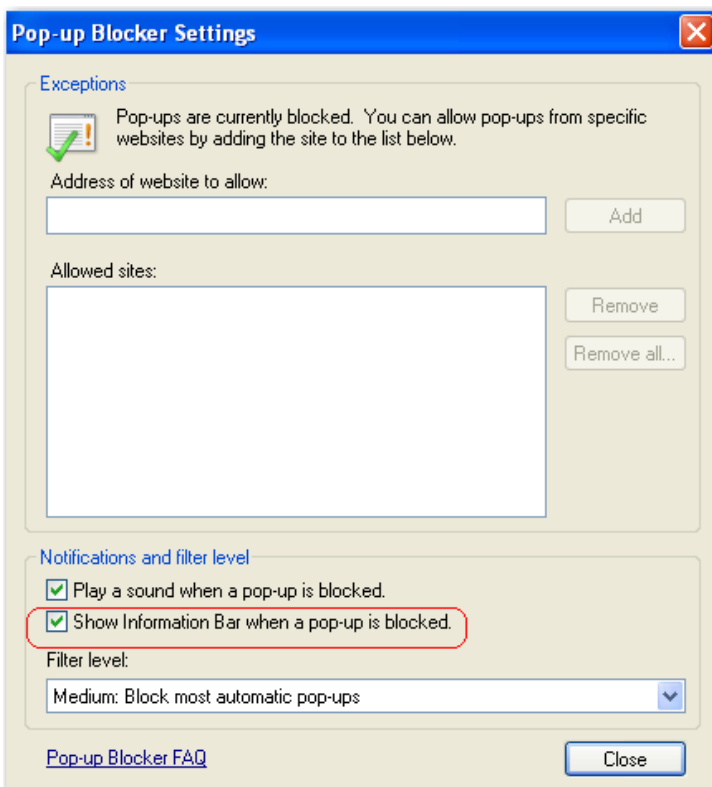
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To control notification when a pop-up window is blocked, follow these steps:

1. Click **Tools**, point to **Pop-up Blocker**, and then click **Pop-up Blocker Settings**.



2. The **Show Information Bar when a pop-up window is blocked** field should have a checkmark. Click the box if not checked.



3. Click **Close**.

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How do I search for a Server Job/Setup?

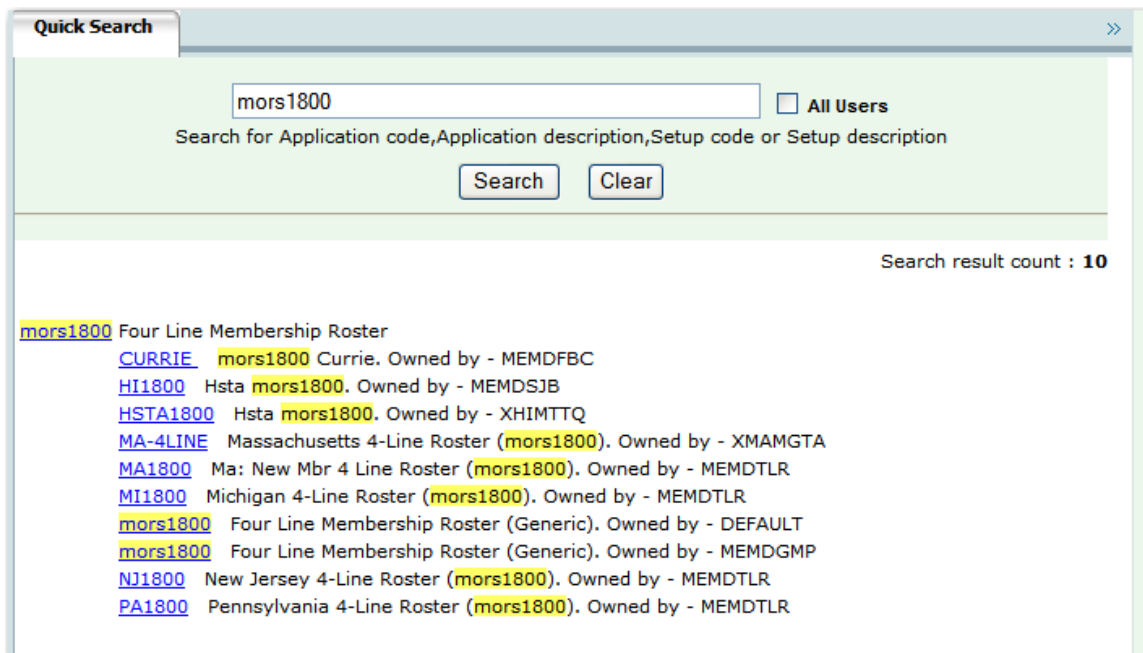
A. There are 2 methods to search for a Job/setup.

I. Using the Quick Search: From the Reports & Extracts landing page click on the



button. On the Quick search tab enter the application name or a portion of it and click on **Search**. If you are an admin user then check the All User Checkbox to view the Jobs of other users as well.

The results of the search are displayed on the screen as shown below.



Quick Search >>

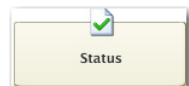
mors1800 All Users

Search for Application code,Application description,Setup code or Setup description

Search Clear

Search result count : 10

[mors1800](#) Four Line Membership Roster
[CURRIE](#) mors1800 Currie. Owned by - MEMDFBC
[HI1800](#) Hsta mors1800. Owned by - MEMDSJB
[HSTA1800](#) Hsta mors1800. Owned by - XHIMTTQ
[MA-4LINE](#) Massachusetts 4-Line Roster (mors1800). Owned by - XMAMGTA
[MA1800](#) Ma: New Mbr 4 Line Roster (mors1800). Owned by - MEMDTLR
[MI1800](#) Michigan 4-Line Roster (mors1800). Owned by - MEMDTLR
[mors1800](#) Four Line Membership Roster (Generic). Owned by - DEFAULT
[mors1800](#) Four Line Membership Roster (Generic). Owned by - MEMDGMP
[NJ1800](#) New Jersey 4-Line Roster (mors1800). Owned by - MEMDTLR
[PA1800](#) Pennsylvania 4-Line Roster (mors1800). Owned by - MEMDTLR

II. Using the status screen: From the Landing Page click on the  button or from the Batch submission screen click on the [Status](#) Hyperlink in lower left corner.

Clicking on the Status Button on the Landing page will open up the Report Status screen:



Report Status

Org Name: VIRGINIA EDUCATION ASSOCIATION

Org ID: 0000000060

User: TTVAUSER - VIRGINIA STATE USER

Job Key:

Application ID:

Search Reset

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Enter the Search criteria and Click **Search**. The results are displayed in the grid as shown below:

The screenshot shows the 'Report Status' interface. At the top, there are input fields for 'Org Name' (VIRGINIA EDUCATION ASSOCIATION), 'Org ID' (0000000060), 'User' (TTVAUSER - VIRGINIA STATE USER), 'Job Key' (638480), and 'Application ID' (FRCL0350). Below these fields are 'Search' and 'Reset' buttons. A table below displays search results with columns: Job Key, Application, Setup, Preview, Print, Copy, Status, Resubmit, Delete, Started, Ended, and User Id. The first row shows Job Key 638480, Application FRCL0350, Setup FRCL0350, Status Success, Started 05/29/2009 09:24 AM, Ended 05/29/2009 09:25 AM, and User Id TTVAUSER.

Job Key	Application	Setup	Preview	Print	Copy	Status	Resubmit	Delete	Started	Ended	User Id
638480	FRCL0350	FRCL0350				Success			05/29/2009 09:24 AM	05/29/2009 09:25 AM	TTVAUSER

OR

Click on the Status Hyperlink from the Batch job submission page. This brings up the status Tab:

The screenshot shows the 'Batch Job submission' interface. On the left, there is a sidebar with 'Applications', 'Recent Jobs (Status)', and 'Favorite Applications'. The 'Status' tab is selected and highlighted with a red box. The main area shows search criteria: 'Org Name: Virginia Education Association', 'Org ID: 0000000060', 'User: TTVAUSER - VIRGINIA STATE USER', 'Job Key', and 'Application ID'. 'Search' and 'Reset' buttons are present. At the bottom left, there are links for 'Status' and 'Copy File to Server', with 'Status' highlighted by a red box.

Figure 1: Batch Job submission

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Enter the Job Key or Application ID and click on **Search**. The results will be displayed in a grid as shown below.

The screenshot shows a web application window titled "Batch Job submission". On the left, there is a sidebar with "Applications" and "Favorite Applications" sections. The "Favorite Applications" section contains a table with columns "Application", "Setup", and "Remove". The main area is titled "Quick Search" and "Status". It includes search fields for "Org Name" (Virginia Education Association), "Org ID" (0000000060), "User" (TTVAUSER - VIRGINIA STATE USER), "Job Key", and "Application ID" (frcl0350). There are "Search" and "Reset" buttons. Below the search fields is a table with columns: Job Key, Application, Setup, Preview, Print, Copy, Status, Resubmit, Delete, and Started. The table contains one row with the following data: Job Key: 633480, Application: FRCL0350, Setup: FRCL0350, Status: Success, Resubmit: (up arrow icon), Started: 05/29/2009 09:00. At the bottom of the sidebar, there are links for "Status" and "Copy File to Server".

Figure 2: Status Tab

(End of FAQs)



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