



*Great Public Schools
for Every Child*

INTERACTIVE MEMBERSHIP SERVICES USER GUIDE

V3.3

Getting Started in IMS

www.nea.org/ims

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INTERACTIVE MEMBERSHIP SERVICES (IMS)

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INTERACTIVE MEMBERSHIP SERVICES (IMS)

Overview

Interactive Membership Services (IMS) is an application that provides membership services to affiliates via the web. This suite of services includes personal and role updates; membership enrollments, updates and cancels; extracts and uploads; simple rosters and labels; security administration and other features.

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 follows the business rules of I&A, and stores information in the I&A database.

IMS provides a view of member information from I&A. This application will allow authorized users the ability to update member's demographic and role information, extract/upload data, add new membership(s) and maintain existing membership(s) while other restricted users may be limited to view only presentations.

This application is designed to be utilized by the State, UniServ and Local staff and leaders via I&A Security. A user must have a valid I&A user ID to access the web applications. State association users will have update access to all members in the state. UniServ users will have update access to all members in the locals belonging to that UniServ. Local association users will have update access to members in their local.

IMS System Availability:

The IMS System is available from 8:00 a.m. - 10:00 p.m. EST, Monday through Friday; 8:00 a.m. - 8:00 p.m. EST, Saturday and Sunday and follows the same system availability schedule as the Individual and Affiliates system (I&A). IMS is **only** available when I&A is available (see I&A System Availability schedule on InsideNEA for further scheduling information).

IMS includes the following functionality:

- **Individual Inquiry** allows authorized Association staff to search for a member based on a variety of criteria and view the member's profile including personal, role and membership information.
- **Individual Maintenance** allows authorized Association staff to search for a member based on a variety of criteria and view the member's profile including personal, role and membership information. These users can update individual data such as name, address, phone, e-mail, ethnicity, gender, date of birth, roles, party affiliation, voter registration information, additional individual defined demographic information, work location (within the same employer), subject and position.
- **Affiliate Lookup & Profile** allows authorized IMS users to view association information including address, phone, roles and membership counts as well as information on related employers and work locations. Authorized users can update roles.
- **Membership Maintenance** allows authorized IMS users to enroll members into the Individual and Affiliates (I&A) database and maintain (update, renew, cancel, reactivate) existing I&A memberships.
- **Extract** allows the extract of personal, contact and limited membership data to delimited files for import into Excel, Access, etc. A standard enrollment template is also available for download to be used for the upload of membership enrollments.
- **Upload** allows the upload of standard and ACCESS files containing individual, work detail (work location, subject and position) and geopolitical data to I&A for update. The ability to upload membership enrollments using a standard template is also available.
- **Reports** provide a simple way to produce basic **labels** or **rosters** for a selected group of individuals.

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- **Accounts Receivables** allows the view of a billable party's year to date obligation, receipts paid, billing status, adjustments to obligation, counts of members and corresponding obligation and penalties under Accounts Summary.
- **SSA Admin** allows **State Security Administrators** to reset user passwords for IMS & I&A users within their state. In addition, they will be able to reactivate a user's Security Profile that has been disabled in IMS because of a number of unsuccessful login attempts.

The application should work on any browser. You do NOT need Citrix to access IMS.

Java Plug-in

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. This should take less than a minute, and will allow you to use all of the features within Affiliate Profile.

If you have problems with the plug-in, or receive an error message:

No JAVA 2 SDK, Standard Edition v 1.3 support for APPLET!

You can download Java directly by going to www.sun.com and download version 1.3 or 1.4. Here is a possible link:

<http://java.sun.com/j2se/1.4.2/download.html>

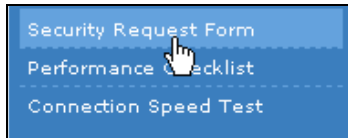
Click on **Download J2SE JRE** (Java Runtime Environment - JRE) and follow the instructions. You don't need the Software Development Kit (SDK).

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Security

A user must have a valid User ID and password to access the web applications. If you currently use I&A, it is the same as your I&A User ID and password, although you still need to add access to IMS. If you do not have access to IMS, or if you would like to modify access to IMS (for example, change from Inquiry to Maintenance), contact your State Security Administrator (SSA) to sign the Security form and mail or fax it to NEA Membership Management Services (MMS). The MMS Fax number is 202-822-7669. Once we have received it, the SSA will be notified of your access status within 3 business days. The Security form is available in InsideNEA>Membership Management>Forms and from the *Help* menu.

Click on the **Security Request Form** link from the *Help* Menu.



You do NOT need Citrix to access IMS.

The password should be changed often to keep it secured. You can do this from within I&A, or within IMS. Select **Change Password** from the *Help* menu:



➤ Enter your current password, then the new password twice (6 to 10 letters/numbers, case sensitive):

Change Password

Your current password:

Change your password:

Verify your new password:

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There are ten (10) groups of IMS Security.

At the minimum a user must have Inquiry or Individual Maintenance security in order to access IMS.

1. **Inquiry Only** (inquiry/view of IMS data)
2. **Individual Maintenance** (individual, role and work detail information maintenance) – either Inquiry Only or Individual Maintenance is required
3. **Labels/Roster** (produces simple Labels or Roster) -- optional
4. **Membership Enrollments** (update/add individual information, add memberships) -- optional
5. **Membership Maintenance** (update individual information, renew, update, cancel, reactivate membership information) -- optional
6. **Advanced Obligation Adjustment** -- (obligation adjustment of required funds) -- optional
7. **Extract** (extracts, download of search results list) -- optional
8. **Upload Validation** (upload of standard data files) -- optional
9. **Upload Commit** (commit of changes contained in uploaded data files to I&A database) -- optional
10. **Funds Receivables** (FRS) Inquiry (view only of Billable Party Account Summary) -- optional

In addition to the above functional security, there are two **Sensitive Data Security** groups: Viewing/Updating Individuals and Reporting. These control the viewing and updating of certain data elements related to a member's privacy. The data elements are Social Security Number (SSN), last 4 digits of the SSN (SSN4), Birth Date and Birth Year. These data are encrypted in the I&A database and a user must have Full or Partial Sensitive Data Security access to view or update these fields or retrieve them in reports.

Users may have a different access level for Individual Updating vs. Reporting. For example, a user may have Full Access for Individual/Membership screens and Partial access for Reporting.

Sensitive Data Security Access	Content
Full	See/Update/Retrieve SSN, SSN4, Birth Date & Birth Year
Partial	See/Update/Retrieve SSN4 and Birth Year
No	Can not see/retrieve any of the sensitive data

IMS Tabs & User Security Profile

IMS tabs are displayed based on each user's security profile. A user will only see tabs for the specific functionality that he or she has access.

Here are two examples based on user access.

A user with Inquiry Only access will see the following tabs:



A user with Maintenance, Extracts & Reporting access will see more tabs:



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SSA Admin

State Security Administrator (SSA) users with IMS State Security Administration security privileges can reset user passwords and reactivate user security profiles for IMS and I&A users within their state.

The IMS User ID and Password are the same as the I&A User ID and Password.

SSAs can access the Security Profile Manager page by hovering over the [SSA Admin](#) menu above the IMS navigation toolbar and clicking on the [Security Profile Manager](#) link.



Click on the **Security Profile Manager** link option under SSA Admin.

The **Security Profile Manager** page is displayed. Help Text is located on the right side of the page.

Security Profile Manager

To reset a password or reactivate the user's Security Profile, click on the dropdown, select the desired User ID and click Submit.

User ID:

Click the dropdown, select the desired User ID and click Submit to reset the user's password and reactivate the Security Profile.

The password is reset to the User ID.

Reactivation of the Security Profile removes the temporary lock placed on the User ID due to multiple unsuccessful login attempts which resulted in a message that the Security Profile was disabled.

Clicking Reset clears keyed data.

To disable a user's Security Profile, contact NEA MMS Support, imsSupport@nea.org.

Click on the dropdown to select the desired User Id and click on button to reset a password and reactivate an account.

- The User's Name and ID are provided for your selection.
- The reset password functionality will reset the IMS/I&A password. The password will be reset to the User Id (i.e. XALMXXX).
- If a User ID needs to be disabled, the State Security Administrator must still contact NEA IMS Support, via the link at the bottom of the help text, imsSupport@nea.org.
- Click the button to clear any keyed data.

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After Submit, a page will be displayed showing that the Password reset and Security Profile reactivation was successful. To reset/reactivate another User ID, once again click on the **Security Profile Manager** option under SSA Admin.

Security Profile Manager

The Following Security Profile Has Been Reset & Reactivated

User ID: TTARUSER

Profile Status: Reset & Reactivated

In addition, SSAs can reactivate user profiles disabled in IMS due to unsuccessful login attempts. Reactivation removes the temporary lock on the User ID when the user has made multiple unsuccessful attempts to login and received a message that the account has been disabled.

Data Confidentiality

Maintaining association data confidentiality has become a major concern to the NEA and its affiliates. To this end, measures have been taken to safeguard this data within IMS.

The IMS 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, SSN so that it cannot be read as the information travels over the Internet.

Confidentiality language has been posted on web pages in IMS cautioning our users concerning the use and storage of association data.

Association data is confidential and should be viewed only by authorized users. Users who access this data are responsible for maintaining its confidentiality. Protect the use and storage of this data.

In addition, the following text is displayed at the bottom of every roster: *Confidential Data - Protect the use and storage of this data.*

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Login Attempts

After a number of unsuccessful login attempts, the user's Security Profile may be disabled.

- Incorrect User ID (regardless of Password): the system will issue this error message.

Please correct the following errors
Invalid username/password.

Login: Please enter your User ID and Password

User ID:

Password:

Welcome to Interactive Membership Services (IMS).

Hours of Operation: Monday-Friday 8 a.m. to 10 p.m. EST;
Saturday & Sunday 8 a.m. to 8 p.m. EST.

Not available on Federal holidays.

Please enter your User ID and Password.

Forgot Password? - First, enter your **User ID** and click **Submit**.
Next, click [Contact Security Administrator](#) to email your State Security Administrator(s). Please include your User Id, contact information and whether you need a password reset and/or an account reactivated.

- Correct User ID, incorrect Password: after five (5) consecutive tries, the system will put a temporary lock on the user's Security Profile. Wait about five minutes and try again.
- **NOTE: password is case sensitive.**

Please correct the following errors
Five consecutive login failures.
Your account has been temporarily disabled.
Please wait five minutes and try again.

Login: Please enter your User ID and Password

User ID:

Password:

Welcome to Interactive Membership Services (IMS).

Hours of Operation: Monday-Friday 8 a.m. to 10 p.m. EST;
Saturday & Sunday 8 a.m. to 8 p.m. EST.

Not available on Federal holidays.

Please enter your User ID and Password.

Forgot Password? - First, enter your **User ID** and click **Submit**.
Next, click [Contact Security Administrator](#) to email your State Security Administrator(s). Please include your User Id, contact information and whether you need a password reset and/or an account reactivated.

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- Correct User ID, incorrect Password. After ten (10) consecutive tries, the system will put a permanent lock on a user's Security Profile.

Please correct the following errors

Ten consecutive login failures.
Your account has been disabled.
Please contact your state security administrator to enable the account and reset password, if needed.

Login: Please enter your User ID and Password

User ID:

Password:

Welcome to Interactive Membership Services (IMS).

Hours of Operation: Monday-Friday 8 a.m. to 10 p.m. EST;
Saturday & Sunday 8 a.m. to 8 p.m. EST.

Not available on Federal holidays.

Please enter your User ID and Password.

Forgot Password? - First, enter your **User ID** and click **Submit**.
Next, click [Contact Security Administrator](#) to email your State Security Administrator(s). Please include your User Id, contact information and whether you need a password reset and/or an account reactivated.

Users who have unsuccessful login attempts can send an email directly to their SSA. They should type their User ID (i.e. XALMXXX) in the User ID field on the Login page and click the Submit button. An error message will be displayed. At that point they should click on the **Contact Security Administrator** link on the Login page to open an email addressed to all the SSAs within the user's state association.

Forgot Password? - First, enter your **User ID** and click **Submit**.
Next, click [Contact Security Administrator](#) to email your State Security Administrator(s). Please include your User Id, contact information and whether you need a password reset and/or an account reactivated.

We recommend users enter a standard phrase in the Subject line, such as 'Reset Password'. Once the email has been sent, the SSA can easily reset the user's password to match the User ID.

Users who forget their User ID can also send an email, but it will be addressed to imsSupport@nea.org and sent to NEA to reset/reactivate the Security Profile.

Note: *Once the User ID has been reset, the User should immediately change his or her password for security reasons.*

TIPS:

- Password *Reactivate* - the user **knows** his password. However for some reason he enters the wrong information (misspelled, wrong case) 10 or more times and receives the message above. Reactivating the account removes the 'lock'. Contact your State Security Administrator.
- Password *Reset* - the user **forgot** his password. The password will be reset to the *same* as the User ID (for example XCOMNAM), in capital letters. Contact your State Security Administrator.

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Login Attempt Summary:

Attempt	Error	How to correct
Invalid User ID (Password may be valid or invalid)	Invalid User ID/Password	Re-login with correct User ID/Password
Valid User ID, invalid Password: 1-4 tries	Invalid User ID/Password	Re-login with correct User ID/Password
Invalid User ID, invalid Password: 5-9 tries	Five consecutive login failures. Security Profile temporary disabled	Try again after five minutes.
Invalid User ID, invalid Password: 10+ tries	Ten consecutive login failures. Security Profile permanently disabled ('locked')	Contact your State Security Administrator to reset Password and reactivate Security Profile
Lost Password		Contact your State Security Administrator to reset Password and reactivate Security Profile

System Timeout Feature

The IMS System will timeout after one hour of inactivity. This is the maximum interval between receiving a page in your browser window and doing something, for example, clicking a button. There are two main reasons for having a timeout. First, the web server needs to free up its own memory from abandoned sessions (when the user really has left); and second, it imposes a layer of security, preventing someone else from sitting at a computer and using the application long after the user who signed in walked away.

After an hour, if a selection is made, the Login screen will appear. Login again to resume activity.

If you are on a public computer, or are otherwise concerned about others viewing member data you have reviewed during the session, we recommend you **logoff** after each session, then **close** the internet browser.

I&A Audit Trail

IMS is available the same hours that I&A is available. Updates from the web to I&A are immediate. All updates to I&A include audit information:

Batch Update By = the I&A User ID (e.g. **XCOMNAM**)

Batch Update Date = the date the I&A record is updated

Batch Update Source (or Batch Create Source) = User ID – **IMS** (e.g. XCOMNAM-IMS)

Last Batch Job ID = the system transaction ID. This is the numeric portion of the confirmation number that you receive after a web update is successful (e.g. **3180** in 'MBRSVC3180').

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Accessing Interactive Membership Services

- Start your internet browser.
- In the Address bar, type in <http://www.nea.org/ims> and press Enter. You will be automatically redirected to the secured site <https://www.nea.org/ims>.

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Interactive Membership Services

Login: Please enter your User ID and Password

User ID:

Password:

Welcome to Interactive Membership Services (IMS).

Hours of Operation: Monday-Friday 8 a.m. to 10 p.m. EST;
Saturday & Sunday 8 a.m. to 8 p.m. EST.

Not available on Federal holidays.

Please enter your User ID and Password.

Forgot Password? - Please contact your state security administrator to reset the password. [Contact Security Administrator](#)

- To log in, enter your User ID and Password and click the **Submit** button. The password is case sensitive.
- You will receive a Welcome page:

NEA Admin SSA Admin Help Logoff

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Interactive Membership Services

Home Individuals Affiliates Extracts Upload Reports FRS

Welcome KAREN FRENCH(MEMDKLF)

Welcome to Interactive Membership Services (IMS). IMS provides a secure web interface to the Association's member data. Some key features include:

- **Individual/Member Maintenance:** Provides the ability to search for, view and modify member data, enroll a new member, and assign role information
- **Affiliate Profile:** Provides a snapshot of an Affiliate, including contact information, membership counts, and role information
- **Extracts / Reports:** Create extracts, reports and labels based on your search criteria
- **Upload:** Provides the ability to upload data, such as enrollments and address changes, to I&A via an upload/import utility

For information on IMS, refer to the Frequently Asked Questions or the User Guides under the Help menu to answer any questions you may have.

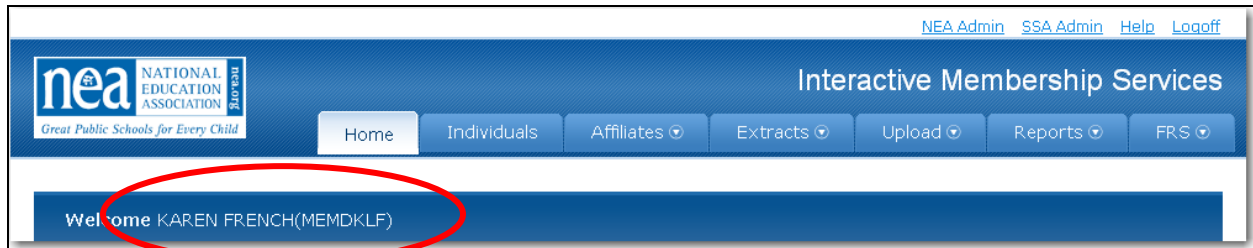
Please direct any questions or comments to your State Affiliate IMS/Membership Contact. They will forward them to NEA, if needed.

Association data is confidential and should be viewed only by authorized users. Users who access this data are responsible for maintaining its confidentiality. Protect the use and storage of this data.

INTERACTIVE MEMBERSHIP SERVICES (IMS)

General Navigation

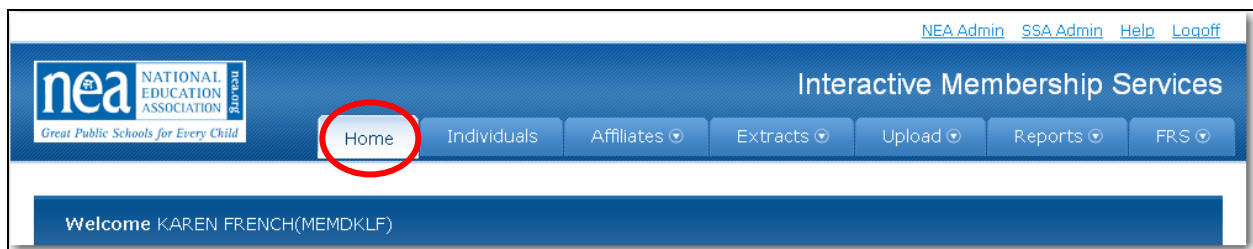
Above the Welcome message, information on the user is provided.



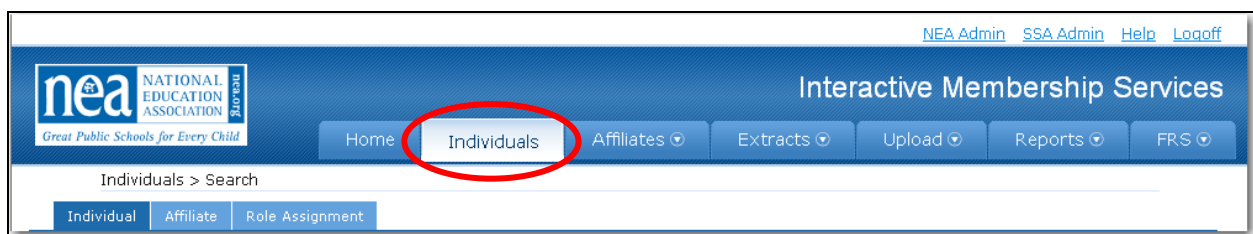
The Toolbar

There are six tabs near the top of the page: Home, Individuals, Affiliates, Extracts, Upload and Reports.

Home displays the IMS Welcome Page.



Individuals displays search options:



Search by Individual

This feature allows authorized users to search for an individual by Individual ID, full SSN, SSN4, Alt ID, First and Last Name and State of Residence.

Search by Affiliate

This feature allows authorized users to search for an individual by UniServ, Local and Work Location. Additional (advanced) criteria include Membership Year & Status, Renewal & Continuous Indicators, and Membership Types.

Search by Role Assignment

This feature allows authorized users to search for an individual by State, UniServ, or Local role assignments.

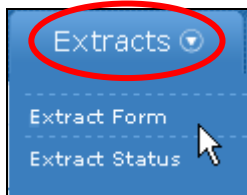
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Affiliates Profile



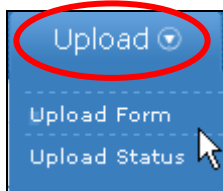
This feature provides general information (address, phone, fax, etc.) for the state, uniserv, local, employer or work location. Roles and Membership Counts are also included.

Extracts



This feature allows authorized users to extract member data from I&A based on a variety of search criteria. The initial implementation of this feature allows the download of Individual contact and personal demographic data, geopolitical/voter related data and limited membership data via standard extract formats. Extracted files can then be downloaded to a PC with import capability into Excel. Refer to the ***Extracts User Guide*** for more information.

Upload

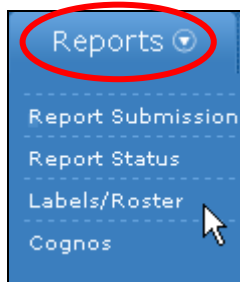


This feature allows authorized users to upload modifications to Individual data, Geopolitical related data and work detail information (work location, subject, position) in standard extract format and apply the updates to I&A data. Refer to the ***Upload User Guide*** for more information.

There is an **Enrollment Upload** function that provides a simple means to input a large quantity of enrollments into the I&A database by completing a standard template, and uploading the data to be inserted into I&A.

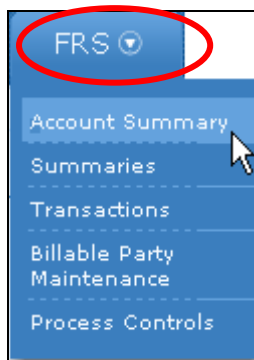
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Reports



This feature allows users to produce a simple roster or labels for a group of members. Report Submission allows users to submit I&A server report jobs and Report Status allows the user to track progress of the submission and finally download the report to your PC. BJS Report Submission, Report Status and the Cognos link will be delivered in a future release.

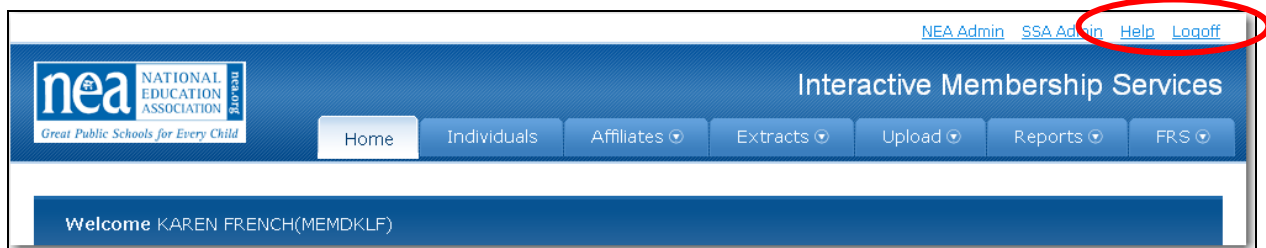
Funds Receivables



This feature allows users to view Account Summary information including a billable party's year to date obligation, receipts paid, billing status, adjustments to obligation, counts of members and corresponding obligation and penalties. Summaries, Transactions, Billable Party Maintenance and Process Controls will be delivered in a future release.

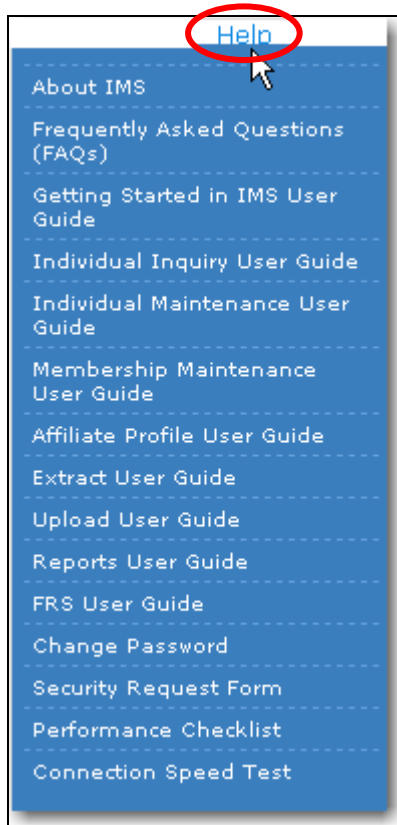
Logoff and Help

Above the IMS navigation toolbar, Logoff and Help are available.



INTERACTIVE MEMBERSHIP SERVICES (IMS)

Help



The **Help** menu provides access to **Frequently Asked Questions** and the **User Guides** (PDF documents). **About IMS** includes information regarding functionalities currently provided as well as those planned for in future phases. You are encouraged to **Change Password** periodically for security reasons.

Performance Checklist

An IMS Performance Checklist is available to assist in troubleshooting performance problems. If a user is experiencing performance or response time problems, ask him or her to download the IMS Performance checklist.



It is available from the Help Menu above the navigation toolbar. The checklist captures specific information required for NEA to investigate the problem.

At the end of the checklist is a list of suggested minimum requirements for an IMS user's system configuration.

Connection Speed

A link from the IMS Help menu is available for you to test the performance of your connection speed.

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To run the test, click on the link. Sample files will be downloaded. The test will provide the actual time it took for the user to download the files. This will give us the user's connection speed.

Logoff



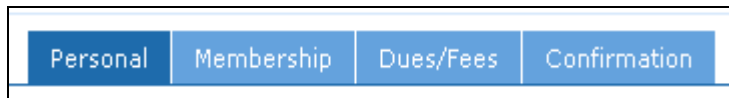
Logoff on the navigation toolbar logs you out of the system. However, if you are on a public computer, or are otherwise concerned about others viewing member data you have reviewed during the session, we recommend you close the internet browser.

Navigation – Backwards and Forwards

Navigation forwards or backwards in the application can be accomplished in several ways. In general, do not use the Back button in IMS. Using the Back button on your web browser can produce unexpected results.

Tabs

On the individual and membership maintenance screens, there are tabs across the top. By clicking on a tab, you can navigate to the required page.




Breadcrumbs

On the individual and membership maintenance screens, there are a series of breadcrumbs across the top (>). By clicking on a breadcrumb, you can navigate back to the search page, search results page or the membership summary page.

Individuals > [Search](#) > [Search Results](#) > [Membership Summary](#)


Note: Breadcrumb is a term used for the link and > sign that allows you to navigate back to a previous page.

Reset button


Click the  button to abandon any keyed data. The displayed values will revert to current database values.

Continue button

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Click the  button on the individual and membership maintenance screens to advance from one page forward to the next.

Confirm button

Click the  button on the individual and membership maintenance screens to advance directly to the Confirmation page.

(End of User Guide – Getting Started in IMS)