

# MEMBERSHIP SYSTEMS SECURITY REQUEST FORM

**Name:** \_\_\_\_\_ **State (or NEA Dept):** \_\_\_\_\_  
*(First, Middle Initial and Last Name)*

**USERID:** \_\_\_\_\_ **Citrix Login ID:** \_\_\_\_\_  
*(Required)* *(Required)*

**Email ID:** \_\_\_\_\_  
*(Required)*

**1. DEFINE USER LEVEL: (Check ONE only)**

- NEA User     UniServ User    UniServ Name \_\_\_\_\_  
 State User     Local User    Local Name \_\_\_\_\_  


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 NEW User     Update to Existing User Profile     Reactivate Existing User Profile     Deactivate Existing User Profile

**2. REQUIRED FOR ALL ACCESS:**     IMS Access     I&A Access

**3. Online Sensitive Data Privilege Access -- Check ONE**

*(Controls access to Social Security Number, SSN4, Full Date of Birth, Year of Birth and EFT Bank Account Number)*

|   |  |  |
|---|--|--|
| <input type="checkbox"/> <b>Full Privilege</b><br><i>(Full SSN, full DOB and EFT Bank Account Number)</i> | <input type="checkbox"/> <b>Partial Privilege</b><br><i>(access to SSN4 and Birth Yr only)</i> | <input type="checkbox"/> <b>No Privilege</b> |
|---|--|--|

**4. IMS SUBSYSTEMS ACCESS:** *Select as many as applicable*

- |  |  |   |   |
|--|--|---|---|
| <input type="checkbox"/> IMS Inquiry ( <i>IND, MOE, AFF, EWL, GR and ROL</i> ) | <input type="checkbox"/> IND Maintenance                             | <input type="checkbox"/> UNISERV Subsystem        | <input type="checkbox"/> Upload Validation        |
| <input type="checkbox"/> EWL Maintenance                                       | <input type="checkbox"/> AFF Maintenance                             | <input type="checkbox"/> AFF Advanced Maintenance | <input type="checkbox"/> Upload Commit            |
| <input type="checkbox"/> FRS Inquiry   | <input type="checkbox"/> EWL Advanced Maint                          | <input type="checkbox"/> GR Maintenance           | <input type="checkbox"/> ROL Maintenance          |
| <input type="checkbox"/> Membership Maintenance                                | <input type="checkbox"/> FRS Transactions                            | <input type="checkbox"/> FRS Advanced Maintenance | <input type="checkbox"/> ROL Advanced Maintenance |
| <input type="checkbox"/> MEX Maintenance                                       | <input type="checkbox"/> MOE Advanced Obligation                     | <input type="checkbox"/> ROL EXPRESS              | <input type="checkbox"/> MOE Advanced Maintenance |
| <input type="checkbox"/> EFT Inquiry   | <input type="checkbox"/> MEX Advanced Maintenance                    |   | <input type="checkbox"/> EFT Express Data Entry   |
| <input type="checkbox"/> UTL Inquiry   | <input type="checkbox"/> EFT Maintenance ( <i>incl EFT Express</i> ) |   | <input type="checkbox"/> EFT Advanced Maintenance |
| <input type="checkbox"/> RA-Reg - Level _____                                  | <input type="checkbox"/> UTL Maintenance                             |   | <input type="checkbox"/> UTL Advanced Maintenance |
|  | <i>(see next page for level numbers)</i>                             |   |   |

**5. REPORTS** *(check one member privacy level and the applicable reporting access)*

|  |  |  |
|--|--|--|
| <input type="checkbox"/> <b>Full Privilege</b><br><i>(Full SSN, full DOB, and EFT Bank Account Number)</i> | <input type="checkbox"/> <b>Partial Privilege</b><br><i>(access to SSN4 and Birth Yr only)</i> | <input type="checkbox"/> <b>No Privilege</b> |
|--|--|--|

**IMS REPORTS:**     IMS Labels/Rosters     IMS Extracts     Server Reports *(From below Select as many as applicable)*

| Server Report Only           |                                 |   |                                   |                              |                                |                                    |                               |                                  |   |
|------------------------------|---------------------------------|---|-----------------------------------|------------------------------|--------------------------------|------------------------------------|-------------------------------|----------------------------------|---|
| <input type="checkbox"/> AFF | <input type="checkbox"/> Counts | <input type="checkbox"/> Custom               | <input type="checkbox"/> Extracts | <input type="checkbox"/> EFT | <input type="checkbox"/> EWL   | <input type="checkbox"/> FRS       | <input type="checkbox"/> FYMP | <input type="checkbox"/> General | <input type="checkbox"/> Govt Relations |
| <input type="checkbox"/> IND | <input type="checkbox"/> Labels | <input type="checkbox"/> Membership Materials | <input type="checkbox"/> MEX      | <input type="checkbox"/> MOE | <input type="checkbox"/> ROLES | <input type="checkbox"/> Utilities |                               |                                  |   |

**MRA REPORTS:**     Membership Consumer *(run reports only)*     Membership Author *(Author training required)*  
 RA-Reg Consumer *(run reports only)*

I understand that the data contained in the Membership Database is the property of the Association (National, State and Local affiliates of the National Education Association) and is to be used for Association approved purposes ONLY.

\_\_\_\_\_  
 User's Signature  
 Email completed form to: neahqhelp@nea.org

\_\_\_\_\_  
 State Security Administrator's Signature

## Membership Systems Security (MSS) Request Form and Instructions

State Security Administrators (SSA) should allow at least 3 working days for NEA to process access requests. NEA will notify the SSA by email when access processing is completed. Thank you for your patience.

USERIDs are required to gain access to the systems. Each user should have her/his own USERID. Please submit a Security form to request new user access and changes to current user access. This form is used to request all membership system and membership reporting functionality.

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Please follow these steps when completing the form:

1. **Name:** Please PRINT your first, middle initial and last name and identify your State Association (or NEA department).
2. **User Id:** For State, UniServ or Local users, the User Id consists of 7 characters in the format 'XYMZZZ' where 'X' is the first character, 'YY' will be replaced with the alpha state code, 'M' is for membership, and 'ZZZ' will be replaced with the 3 initials of the user's name. [Example: User Id for John P. Jones of Virginia would be 'XVAMJPJ']. NEA Users should contact Kavita Rangarajan for User Id information.
3. **User Level:** Select your organization level. Select one of the following, State, UniServ, Local or NEA. [Example: State staff would check 'State User.' Local staff would check 'Local User' and write in your 'Local Name.'
4. **IMS Subsystem Access Levels:** Select the access levels required for each Subsystem. Be sure to select only those levels appropriate for the user.
5. **The User and the SSA must sign** the form.
6. The SSA must scan and email completed form to ITS Help Desk at [neahqhelp@nea.org](mailto:neahqhelp@nea.org) and retain the original form for their records.

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### Access Level Descriptions *(not all-inclusive)*

- **Upload Validation** – upload of standard extracts and ACCESS files for validation and correction before commit
- **Upload Commit** – commit of changes contained in uploaded data files to the membership database. For Advanced Users only; must also have Upload Validation
- **RA-Reg Levels:**
  - **6** - Inquiry only (NEA/SEA)
  - **5** - update address, phone, email, email restriction, Green, Assn Rep, NBCT, ethnicity, notes and to switch Delegates and Successors (SEA). Requires Indv Maintenance Access
  - **4** - adds the ability to rollover PY delegates to CY, add/delete a delegate/successor, and to lock a unit in AFF (SEA) Requires Indv Maintenance Access and Full Sensitive Data Privilege
  - **3** - adds the ability to add/delete cluster units and to update the RA Only Email address field for a unit (SEA) Requires Indv Maintenance Access and Full Sensitive Data Privilege
- **EFT Express Data Entry ONLY** – users will see the *EFT Express Data Entry* tab only and have no other IMS access
- **Advanced Obligation Adjustment** – adjust/prorate dues and fees
- **Advanced MEX Maintenance** – access to the 'Generate MEX Transactions' feature within MEX
- **Advanced Roles Maintenance** – access to Select Available Roles (SAR)
- **Advanced Utilities Maintenance** – Obligation Setup, State Pay methods and FYMP Custom setup
- **FRS Transactions** – The FRS modules are accessible only to NEA, State and UniServ users.
  - **FRS Inquiry Only** – view Billable Party Summary and Affiliate Summary
  - **FRS Transactions** – adds access to all transactions (including submitting a batch)
  - **FRS Advance** – all FRS functionality

*Note: FRS Receipt Upload – requires BJS/Server security privilege. Only users with FRS Transaction security can review, post and submit the batch once the upload process has completed.*