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INTRODUCTION

The Utilities subsystem is used to define the NEA and state membership infrastructures. This includes the setup of membership types, fund obligations, subject codes, position codes, and payment methods. Drop down lists throughout the membership system are driven by the Utilities Validation table. Custom Future Year Membership Processing instructions and state-defined demographics are also maintained within the Utilities subsystem.

Changes to system data that is used by all affiliates but maintained by NEA, such as the Validation Table and Roles Definition Master List, are made on-line and is immediately available to users.

To access the Utilities subsystem, click Utilities from the IMS Welcome page.

Users are presented with the Utilities welcome page. On the left side of the screen there is a list of the functions available in Utilities.
WORKING IN THE UTILITIES SCREENS

All of the Utilities functionality uses the same presentation, a grid. The grid is used to display the information that has been retrieved from the database. The presentation looks very much like that of an Excel spreadsheet, with column headers and rows of data.

On the bottom, left-hand side of the grid is a set of small icons which are used to add, modify and delete data.

Add

Click this control to ADD a new row of data to the grid. A popup window will open and allow you to enter the new data.

EDIT

Click this control to EDIT an existing row of data. First you must click on the row you want to update, then click the control. A popup window will open and allow you to modify the data.

You can use the navigation buttons to scroll through the grid one row at a time.

The edit control will only be displayed when edits are permitted. For example, if a membership class, sub class or obligation designator has been used in a membership type; it cannot be updated, so the control will not appear.

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**VIEW**

Click on this control to VIEW an existing row of data in a popup window. First you must click on the row you want to view, and then click the control. A popup window will open and show you the data from the row you selected. You can use the navigation buttons to scroll through the grid one row at a time. The view popup window can be resized by clicking the lower right corner of the popup and dragging it with your mouse.

The VIEW does not allow any editing of data.

**DELETE**

Click on this control to DELETE an existing row of data. First you must click on the row you want to delete, and then click the control. A popup window will open and ask you to confirm the delete.

This control will only be available if the delete option is allowed. For example, once an obligation has been assigned to an individual, it cannot be deleted, so the control will not appear.

**RELOAD**

Click on this control to repopulate the grid based on search criteria shown on the screen.

**EXPORT TO EXCEL**

Click on this control to EXPORT the grid results to EXCEL. When Excel opens, depending on your browser, you may receive a message about the contents of the file you are trying to open. Continue to click OK/Yes when prompted whether to continue. The contents of the grid will open in Excel.

**NAVIGATION CONTROLS**

You will notice that on all VIEW popups and some UPDATE popups, navigation controls appear in the lower left corner of the popup. These can be used to scroll through the rows in the grid while viewing the data in the popup, without having to close the popup and select another row.

Once you do key updates to some data and click the button to SUBMIT the updates, the popup window will close.
ADD POPUP CONTROLS

When adding data, you will see a popup window. Enter your data into the fields available, and then click the button that is labeled ‘Add the Row’. If you decide you don’t want to save what you’ve entered, click the ‘Cancel’ button. A message will appear indicating a successful save.

UPDATE POPUP CONTROLS

When updating data, you will see a popup window. Enter your new data into the fields available, and then click the button that is labeled ‘Submit’. If you decide you don’t want to save what you’ve entered, click the ‘Cancel’ button.

DELETE POPUP CONTROLS

When you select the delete action for a row of data in the grid, you will receive a popup requesting confirmation of the action. If you want to proceed with the delete, click the ‘Delete’ button. If you do not want to proceed with the delete, click the ‘Cancel’ button.

REDUCE

(Only applicable on Obligation Setup tab)

Click on this control to CREATE a NEW REDUCTION in obligation setup. First you must click on the standard obligation row for which you want to create a reduction, and then click the control. A popup window will open and allow you to create the new reduction.

ORG TYPE

(Only applicable on Demographic Setup)

Click on this control to identify in which subsystem (such as Individuals, Affiliates, Employers, Work Locations and/or Other Organizations) the Demographic Code will be used.
HELP BOX

(Only applicable on Demographic Setup Add popup screen)

Clicking on this button opens a dialogue box providing descriptions for each field on the Demographic Setup Add and Edit popups.

SAVE POPUP CONTROLS

(Only applicable on Demographic Setup Assign Org Types and State Payment Method Setups popups)

When updating data in State Payment Method Setups or the Assign Org Types popup window in Demographics Setup, click the button that is labeled ‘Save.’

SELECTING AN OWNER ORG

When you first select Utilities and open a screen, the owner org at the top of the screen defaults to your state affiliate.

Whenever you change the owner org at the top of a utilities screen to a local, each screen you subsequently open will automatically default to that local. However, if multiple tabs are open and display your state as the owner org, for example, and you then open a tab and change the org to one of your locals, those tabs that were already open will not change. The action of opening the tab is what sets the org at the top. So in this case, closing a state tab and reopening it would trigger the action of changing the org to the latest local for which you searched.

The exception to this is for Custom FYMP Setup, Class/Sub-Class/Obligation Designator, Specific Position, Specific Subject, Specific Level and Demographic Setup tabs. Because it’s never appropriate for the owner org to be a local, the owner org on screens will always default to your state, regardless of your latest search on another tab.
FUND SETUP PROCESSING

Fund Setup is used to identify State, UniServ, NEA and Local funds, such as Dues, Political Action Contributions and Other funds. You maintain your state association’s funds in this module. Every local for which you include in your membership obligation or wish to print on renewal/continuous roster must have a setup.

There are four types of funds: Dues, Pac, Uniserv and Other. The different internal organization levels (NEA, SEA, and LEA) can each have multiples of these funds.

Funds are identified:

- for each association (NEA, each state and each local association)
- by text name (NEA Dues, ISEA Dues, ISEA UniServ, ISEA Scholarship)
- By Fund Code (D01=first Dues fund, P01= first PAC fund, U01= first UniServ fund, F01-first Other Fund).

We suggest using the following naming convention for the code of each fund type: Dues = Dnn, PAC = Pnn, UniServ = Unn; and Other Fund = Fnn (nn=number). If a state affiliate decides to deviate from this, it is suggested that the coding convention for its local affiliate funds should follow that of the state.

When creating funds for locals, it is recommended to use one standard naming convention. For example, use “LEA Dues” for all your local associations, rather than “LEA Dues” for one, “LOC Dues” for another and “LOCAL Dues” for yet another local. This will matter later when working with lists of local funds when you will not want to see so many different names for LEA dues.

Once a fund has been used in membership processing, it cannot be ended. Even if it will no longer be used, it will be displayed in historical membership records. Talk to your NEA MMS contact about deactivating the fund.

Click on ‘Fund Setup’ on the Utilities sub-menu to open the grid and display the set of SEA funds defined for your state.
Click on the SEARCH button to open the standard IMS affiliate search popup. You can search for any of your state’s Local affiliates. When you select the affiliate and close the search window, the new set of fund rows is retrieved and displayed in the grid.

The standard controls described in the Introduction will be available to work with the data displayed in the grid.

**ADD NEW FUND**

Typically you add a new fund for a new local affiliate recently added in the Affiliates subsystem; or you are recording LEA dues for a local that has been in existence for some time.

1. Search for and select the organization.

2. Click the add icon and the Fund ADD popup will open. This will allow you to create a new fund for the SEA or LEA displayed.

3. Select the applicable **Fund type**: Dues, Pac, UniServ, Other. Based on your selection, other fields in the pop up will show default values.

4. Enter a **2 digit numeric identifier** for the fund after the displayed alphabetic character. The recommended codes are 01 for the first of this fund type for this organization, 02 for the second fund of this fund type for the organization. Examples are: D01 for Dues, P01 and P02 for PAC funds, F01, F02, and F03 for several Other funds.

5. Leave the default value for the fund name, or edit it as desired.

6. The Primary indicator will be set for the first Dues fund.

7. Enter optional comments only if needed.

8. The Start Date defaults to the current date. This is the date the fund was created, not necessarily when the fund is made available for use. Even if you enter a future date, the fund can be used immediately.
9. Click **Add the row**.

10. A message will appear reminding you to update FRS if applicable.

   **Successfully Saved. If you want to age this fund, Please do so in the Funds Receivable system.**

The fund has been created for the organization.

---

### EDIT EXISTING FUND

Click on a row in the grid and click the update icon. The fund EDIT popup will open. This will allow you to modify the fund selected in the grid.

The only data that can be modified are the fund name, primary indicator and the comments field.

### VIEW EXISTING FUND

Click on a row in the grid and click the view icon. The fund VIEW popup will open. This will allow you to review the data for the fund selected in the grid.

### DELETE EXISTING FUND

Funds cannot be deleted. If you attempt to delete a fund, a popup message will appear indicating that you need to contact your Membership Support to request help in removing an existing fund.
MEMBERSHIP TYPE MAINTENANCE PROCESSING

Membership Types are:

- A combination of a Membership Class, a Subclass and an Obligation Designator. Refer to a complete explanation of these terms in the Class/Subclass/Obligation Designator section in this User Guide.
- Exist for NEA, each state association and each local association based on the specific association’s Bylaws.
- Assigned to an individual to describe the type of membership held at the national, state and local levels.
- Described by both a text description and an alpha/numeric code.

Each state association maintains its own SEA Member types and types used by their local associations.

Below are some examples of the Member Type components.

<table>
<thead>
<tr>
<th>Class</th>
<th>Sub Class</th>
<th>Obligation Designator</th>
<th>Mbrshp Type Description</th>
<th>Mbrshp Type Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Active</td>
<td>Professional</td>
<td>FT (Full Time)</td>
<td>Active Prof FT</td>
<td>AC-1-100</td>
</tr>
<tr>
<td>Active</td>
<td>Educational Support</td>
<td>50% (half time)</td>
<td>Active ESP HT</td>
<td>AC-2-50</td>
</tr>
<tr>
<td>Student</td>
<td>0 (none)</td>
<td>0 (none)</td>
<td>Student</td>
<td>ST-0-0</td>
</tr>
<tr>
<td>Retired</td>
<td>Lifetime</td>
<td>7 Initial Year</td>
<td>Retired Lifetime Init Yr</td>
<td>RT-7-7</td>
</tr>
<tr>
<td>Retired</td>
<td>Lifetime</td>
<td>0 (none)</td>
<td>Retired Lifetime</td>
<td>RT-7-0</td>
</tr>
</tbody>
</table>

When you click on ‘Membership Type Maintenance’ on the Utilities sub-menu, the grid will open and display the set of SEA membership types defined for your state in the current membership year.
<table>
<thead>
<tr>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Member Type Code</strong></td>
</tr>
<tr>
<td>The numeric code for the type</td>
</tr>
<tr>
<td><strong>Member Type Name</strong></td>
</tr>
<tr>
<td>The alphabetic description of the type</td>
</tr>
<tr>
<td><strong>FY Copy</strong></td>
</tr>
<tr>
<td>Indicates the type should be copied to the Future Year when the Future Year Membership Set-up (FYMPSET) job is run.</td>
</tr>
<tr>
<td><strong>Dual</strong></td>
</tr>
<tr>
<td>If checked, indicates an individual may have this membership type, along with another membership type, in the same local association. This usually only applies to PreRetired Subscription types.</td>
</tr>
<tr>
<td><strong>Life</strong></td>
</tr>
<tr>
<td>If checked, indicates the membership type is considered a “Lifetime” or “Active-Life” type.</td>
</tr>
<tr>
<td><strong>Retired Life</strong></td>
</tr>
<tr>
<td>If checked, indicates the membership type is considered a Retired Lifetime type.</td>
</tr>
<tr>
<td><strong>PreRetired</strong></td>
</tr>
<tr>
<td>If checked, indicates the membership type is considered a PreRetired Subscription type.</td>
</tr>
<tr>
<td><strong>Retired</strong></td>
</tr>
<tr>
<td>If checked, indicates the membership type is considered a Retired type.</td>
</tr>
<tr>
<td><strong>Student</strong></td>
</tr>
<tr>
<td>If checked, indicates the membership type is considered a Student type.</td>
</tr>
</tbody>
</table>

Click on the SEARCH button to open the standard IMS affiliate search popup. You can search for your State affiliate or any of your state’s Local affiliates. When you select your affiliate and close the search window, the new set of membership type rows is retrieved and displayed in the grid.

To retrieve the membership types for the future or prior membership year, simply select a new membership year from the drop down and the new set of membership type rows is retrieved and displayed in the grid. The standard grid controls described earlier will be available to work with the data displayed in the grid.

You may need to discuss the Membership Type Composition with your NEAMS contact for a complete understanding.

**ADD NEW MEMBER TYPE**

New member types need to be added when a new local is added to IMS or when a change to the bylaw’s of the state or local require it.

1. Search for and select the desired organization.
2. Click the + icon and the membership type ADD popup will open. This will allow you to create a new membership type for the SEA or LEA and membership year displayed.
3. Select the applicable **Class** from the drop down list of all Classes.

4. Select the applicable **Sub class** from the drop down list of all Sub Classes.

5. Select the applicable **Obligation Designator** from the drop down list. Some member types do not require an Obligation Designator, therefore, select the None choice.

6. Notice as you select the components, the Member Type Code and name fields are populated. You can edit the name as you desire. Be sure to remove the words (NONE) from the type name if it is displayed.

7. The **Copy to Future Year** Indicator is set as a default.

8. Set the Life [ ] Retired Life [ ] Pre Retired [ ] Retired [ ] Student [ ] indicators as applicable.

9. Click .
EDIT EXISTING TYPE

Click on a row in the grid and click the update icon. The membership type EDIT popup will open. This will allow you to modify the membership type selected in the grid.

The only data that can be modified is the FY Copy indicator and Life, Retied, etc. indicators. When a membership type is no longer to be used, deselect the FY Copy indicator so that it will not be carried over to the new year.

VIEW EXISTING TYPE

Click on a row in the grid and click the view icon. The membership type VIEW popup will open. This will allow you to review the data for the membership type selected in the grid.

DELETE EXISTING TYPE

Click on a row in the grid and click the delete icon. A DELETE confirmation popup will open. If confirmed the membership type selected in the grid will be deleted.

If the membership type has been used in an obligation setup, you will receive an error message indicating that the row cannot be deleted. Member types are used in historical data.
MEMBERSHIP CLASSES are defined in an association’s bylaws, such as Active, Retired or Student. Non member classes are used to identify those of interest to the association, such as Agency Fee, Potential Member, and Complimentary. A state association may and will have different Classes than NEA or a local association because the state association’s Bylaws are different.

**Subclass** is a division of membership Class needed when bylaws require dues obligation be different for different groups of members within a Class. For example, NEA Bylaws have a different dues rate for Active members who are Certified versus those members employed in educational support positions. Therefore, NEA has the Subclass of “Professional” and “Educational Support”. Retired members may pay dues annually or a lifetime amount at one time. NEA has a subclass of “Lifetime” and “Annual”. Some Membership Classes need subclasses, others do not. As with Membership Class, each state and local association may have different Subclasses from NEA.

**Obligation Designator** is a further division when bylaws allow different dues amounts based on amount of time worked, by salary or other means. NEA Bylaws allow for one rate for those employed 51-100% of a full time schedule and a different rate for those employed 50% or less than a full time schedule. Therefore, the Active (Class) Professional (subclass) has an Obligation Designator of FT (full time) and 50 % (50 % or less). Some Membership Classes do not require different Obligation Designators because there is only one dues rate for the Class, such as Staff or Complimentary.

A combination of a Class, a Subclass and an Obligation Designator is used to create Membership Types.

Only NEA MMS staff can add a new Class, Sub Class or Obligation Designator.

When you click on ‘Class’, ‘Sub-Class’, or ‘Obligation Designator’ on the Utilities sub-menu, the grid will open and display the set of membership classes along with the override name defined for your state, if any. The list shown is the complete list of Classes, Subclasses, and Obligation Designators, not just those used by your state.
**ADD NEW CLASS, SUBCLASS, OBLIGATION DESIGNATOR**

NEA staff will add new entries for Class, Sub Class and Obligation Designator.
**EDIT EXISTING CLASS/SUB CLASS/OBLIGATION DESIGNATOR**

Click on a row in the grid. If the class has not yet been used in a membership type, the EDIT icon will appear. Click on the EDIT icon and a popup window will appear allowing you to define a state override name.

If the EDIT icon is not visible, this indicates that the class/sub-class/obligation designator name cannot be modified because it is already being used in one or more membership types.
OBLIGATION SETUP PROCESSING

Once you have created funds for your state or local associations and you have created membership types, you now create an obligation amount for each member type/fund combination. Obligation Setup allows you to add or modify standard fund amounts, and add or modify fund reductions.

A Fund Reduction is a lesser/greater obligation amount than the standard obligation which has been defined by the NEA, state or local bylaws. The term implies a lesser amount, but the amount may be greater than the standard obligation. The reason for the reduction will be retained in the database. There are Affiliate and Individual Reductions.

- An Affiliate reduction is a reduction that will be automatically assigned to any individual joining the NEA, State Affiliate or local in the membership type for which a reduction has been defined. NEA approves reductions for NEA memberships in specified state and or local affiliates. State Associations approve reductions for SEA membership in specified locals.

- An Individual reduction is a reduction that will be assigned on an individual-by-individual basis. For example, NEA members who are Military Reservists called to Active Duty receive an individual reduction of their NEA obligation.

As you work with each organization and member types, you will simply enter the standard or reduced obligation information in a popup window.

When you click on ‘Obligation Setup’ on the Utilities sub-menu, the grid will open and display a set of search criteria on the top of the screen. The grid is not automatically populated in Obligation Setup.

A State User can search for any obligation setups defined for the state or its locals. The search criteria can be entered in any combination.
### Search Criteria

<table>
<thead>
<tr>
<th>Owner Org</th>
<th>Click the search button to open the standard IMS Affiliate Search. Once you’ve selected the desired org, close the window and the org selected will be displayed in this field. The owner org will default to your state affiliate when you first enter the Obligation Setup window.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Membership Year</td>
<td>Select from current, prior or future membership years. The membership year will default to current year.</td>
</tr>
<tr>
<td>Membership Type</td>
<td>Select a membership type to retrieve all obligation setups for membership type selected for the owner org and membership year.</td>
</tr>
<tr>
<td>Fund Type</td>
<td>Select a fund type – Dues, PAC, UniServ or Other Funds to retrieve all obligation setups with funds of this type defined for the owner org and membership year.</td>
</tr>
<tr>
<td>Fund Code</td>
<td>Select one of the funds defined for the owner org id to retrieve all obligation setups defined for the selected fund and membership year.</td>
</tr>
<tr>
<td>Obligation Type</td>
<td>Select ‘All Standard’ to retrieve all standard obligations defined without a recipient org for the owner org and membership year. Select ‘All Reductions’ to retrieve all reduced obligations defined for the owner org and membership year. Select ‘Individual’ or ‘Affiliate’ to retrieve all reduced obligation of that type for the owner org and membership year.</td>
</tr>
<tr>
<td>Redct Reason</td>
<td>If you’ve selected a reduction type, the related reduction reasons will be displayed for selection. Select one of the reasons to retrieve all reduced obligations with that reduction reason for the owner org and membership year.</td>
</tr>
<tr>
<td>Recipient Org</td>
<td>Click the search button to open the standard IMS Affiliate search. Once you’ve selected the desired org, close the window and the org selected will be displayed in this field. Obligations retrieved will be limited to those with this recipient org. To preserve all search criteria but reset just the recipient org, click the red ‘X’ next to recipient org.</td>
</tr>
</tbody>
</table>
Selecting Combinations for Search

You may enter any combination of search criteria to search for obligation setups. The owner org and membership year are required. All other search criteria are optional. If no obligation setups are found for the combination of search criteria entered, an empty grid will be presented.

Once you have entered your search criteria, click the ‘Search’ button to populate the grid.

Reset Search Criteria

To start over with new search criteria, simply click the ‘Reset’ button in the search area.

Remember, if you want to keep the same search criteria but change just the recipient org, you can click the red ‘X’ next to the recipient org search field, and that field will be reset to empty.

ADD NEW STANDARD OBLIGATION

1. Search for and select the organization.

2. Click the icon and the standard obligation ADD popup will open. This will allow you to create a new standard obligation for the SEA or LEA and membership year displayed. Where appropriate, the recipient org can be identified for the obligation. If you leave membership type blank, an ‘All Types’ obligation will be created.
3. The organization name and membership year are populated.

4. Select the **Member Type** from the drop down list.

5. Select the **Fund** from the drop down list.

6. Enter the **standard obligation amount** for the type/fund in the format of NNN.CC.

7. The Membership Year Start and End dates are pre populated.

8. This is a standard fund; therefore ignore the Recipient Org field. Setting up a Reduction will be covered in the next topic in this guide.

9. The **Required** indicator is set as a default. If this fund is a not required to be paid, but is a Voluntary choice for the members, remove the check.

10. The **Print with Dues** indicator is set as a default. If this fund should added to the Dues and displayed as one amount on Continuous Rosters, Renewal Roster and Renewal forms, leave the indicator. If the fund should be shown on a separate line from the Dues, remove the indicator.

11. If the amount you entered can be changed or by users to a different amount in Membership processing, leave the **Override** indicator. If the amount you enter cannot be changed by anyone, remove the indicator. This does not include changes you can make to dues when you Prorate.

12. The **Future Year Copy** indicator is set as a default so that the Obligation set up will be copied to the future year when the Future Year Membership Set-up (FYMPSET) job is run.
13. Click **Add the row**.
Dues Reductions or Dues Waivers may be approved by the NEA, state or local Governance for members in certain situations, or for a specific local or states for a specific reason.

**Individual Reductions** apply to one member at a time (not a group of members in a local) for a specific reason. Typically the reasons are: Military Reservist called to Active Duty, Legal proceedings against the member, member is the President of the SEA or LEA, or member was afflicted by Hurricane Katrina.

**Affiliate Reductions** apply to certain groups of members within a State or local. NEA Governance may approve reduced dues for members in a State or a local for certain member types. State Affiliates may approve reduced dues for members in a local. Some reasons are: members of a Minority local, new Local Organizing project, new local with multi-year phased dues, NEA-AFT local.

1. >>For an NEA Dues reduction, the Owner Organization will be NEA.
   >>For an SEA Dues reduction, the Owner Organization will be the state association.

2. Click on a standard obligation row in the grid for which you want to create a reduction, and then click

3. The REDUCTION popup will open and the standard obligation is displayed and protected. Enter the appropriate reduction information, including amount, reduction type, reason, and where appropriate, recipient organization.
4. Notice that there are some new data elements at the bottom of the reduction popup. Optional information about the reduction submission, approval, and original begin and end dates for the reduction may be entered.

5. Enter the reduced obligation amount.

6. Select the Reduction Type. If you select Individual, the Recipient organization may be left blank. If you select Affiliate Reduction, select the applicable affiliate in the Recipient Organization field.

7. Select the Reduction code.

8. If this is an Affiliate Reduction, select the Recipient Organization of this reduction. For NEA Dues it will be a SEA or a local. For SEA Dues it will be a local.

9. For SEA Dues Reductions optionally enter the date the reduction was requested, who or what body approved it and the approval date. This data is entered for NEA Dues Reductions.

10. If there is a specific Begin and/or End date to this reduction, it may be entered.
Click on either a standard or a reduced row in the grid and click the **EDIT** icon. The obligation EDIT popup will open. This will allow you to modify the obligation selected in the grid. The popups for updating standard and reduced obligations will each contain the fields relevant to the type of obligation.

**Update Membership Obligation** indicator is on both the standard and reduced update popups. When the dollar amount has been changed and this box is checked, the nightly process that applies the update to all appropriate individual obligations will know to include this update in the process.

For the obligation update popup, notice that the navigation buttons are not available. This is by design, since the rows in the grid may be two different types, standard and reduced. Since the standard and reduced rows require different data in the update popup window, we are unable to allow the navigation buttons to be used.
**VIEW EXISTING OBLIGATION**

Click on a row in the grid and click the view icon. The obligation VIEW popup will open. This will allow you to review the data for the obligation selected in the grid.

**DELETE EXISTING OBLIGATION**

Click on a row in the grid and click the delete icon. A DELETE confirmation popup will open. If confirmed the obligation selected in the grid will be deleted.

If the obligation has been applied to an individual’s membership, you will receive an error message indicating that the row cannot be deleted.

**GROUP OBLIGATION**

You may need to add or update obligation for a group of locals. Typically this is because all locals assigned to the same UniServ Unit have the same UniServ dues, but each UniServ has different dues from each other. This Group Obligation is processed via a server job, “GRPOBLIG”. Contact your NEA MMS contact to discuss your set up requirements.

**POSITION/SUBJECT/LEVEL PROCESSING**

NEA maintains all information for General and Specific Employment Positions, Subject Areas and Employment Levels. Specific Positions, Subjects and Levels are used during employment processing and each are grouped within the three General Levels of PK-12, Higher Education and Other. At the state level, users have the ability to redefine a specific description for use in the state and the description will appear in the appropriate drop-down windows and reports.
EDIT EXISTING SPECIFIC POSITION/SUBJECT/LEVEL

When you click on ‘Specific Position’, ‘Specific Subject’ or ‘Specific Level’ on the Utilities sub-menu, the grid will open and display the list of Specific Positions, Subjects or Levels along with the override name defined for your state, if any. You can further filter the list by selecting a general value in one or the other drop-down boxes.

1. Click on a row in the grid then click the icon.
2. A popup window will appear allowing you to define a state override name.

3. Enter your SEA defined name for the attribute.

4. Click Submit.

**PAYMENT METHOD PROCESSING**

NEA maintains all information for General and Specific Payment Methods. General Payment Methods define the broad payment type and Specific Payment Methods are applied to individuals during membership processing. For example, within the General Payment Method of Bank Card, there are Specific Payment Methods such as Credit Card, American Express, MasterCard, Visa, and Debit Card.

At the state level through State Payment Method Setups, you have the ability to define the Specific Payment Methods for use in your state.
EDIT EXISTING STATE PAYMENT METHODS SETUPS

When you click on State Payment Method Setups, the grid opens and automatically displays the available list of specific payment methods. Check marked boxes are payment methods your state uses to apply to individuals during membership processing.

![State Payment Method Setup Grid]

To add a new payment method for use or remove a payment method from use in membership processing,

1. Click on the check box to either select or unselect a payment method
2. Click on the SAVE icon.
3. A message is presented reminding you to update your state’s FRS Processing Control payment method relationships
DEMOGRAPHIC SETUP PROCESSING

Demographic is the name given to any type of data a state association wishes to capture when there is no standard defined data attribute for their purpose. A Demographic can be created for data about Individuals, Affiliates (NEA, State, UniServ, Group, Local and Chapter), Employers, Work Locations or Other Organizations.

Demographic Setup allows state affiliate users with UTL Advanced Maintenance Security access to define and maintain the formatting rules for the non-standard data attribute.

Demographic data can be setup with:

- **Global Indicator** – NO- where only state affiliate users with the appropriate security access can add or view the attribute or YES- they can be set globally so that dependent organization users, such as Uniserv and Local Associations users, with the appropriate security can add or view the attribute as well.

- **Auto Display** – Yes- to automatically display for new data to be entered when you access the Demographic for an Individual or Organization, or NO- be set to display only after clicking the ADD icon.

- **Unique Indicator** – YES- to allow only one occurrence per Individual or Organization or NO- be set to allow multiple occurrences.

- **List Value** – as a range of choices shown in a drop-down selection list.

- **Input Data Type** – formatted as a date, string, numeric, currency, or alphabetic characters.

- **Input Mask** – where you can limit the number of digits or characters, or leave it free form for the Input Data Type.

When you click on ‘Demographic Setup’ on the Utilities sub-menu, the grid will open and automatically display any existing set of Demographic Codes defined for your state. The grid is sorted by Demo Code.
When highlighting a row that has a “Y” in the List Value column, an additional pop-up appears displaying the List Values, which are the selection values for the Demo Code.

When highlighting a row where the List Value is an “N”, the box disappears and indicates a user has to enter a defined value.

When highlighting a row and clicking the Org Type button, an additional pop-up appears displaying the Organization Type(s) (Individual or Organization) the Demographic applies to.
**ADD NEW DEMOGRAPHIC SETUP**

1. Click the ADD icon and the Demographic Setup ADD popup will open. Click on the Help Text button for field descriptions.

![Add a new row](image)

2. Enter the Demographic Code. Recommended format is (State Abbreviation, subsystem acronym where the Demographic is used, and a number sequence), such as: OHAFF001, OHAFF002, ALEWL001, WAIND001.

3. Enter the Description.

4. If this will be a List value, click in the box. Another pop up will be used to enter the values which is explained below.

5. Select the Input Data Type: Alpha, Numeric, Date, String, or Currency.

6. You may use the Input Mask field to define the length of the field. For example, a Data type of Numeric has a mask of #### indicating it is a four digit field. A Data Type of String has an Input mask of AA#### indicating the field is 2 alpha characters followed by 4 numeric digits.

7. Set the Unique ID, Global Indicator or Auto Display indicators as required.

8. Click **Add the row**.

---

**ADD ORG TYPE**

After saving a new Demographic Code, the Assign Org Types box automatically appears where you assign and save the Organization Type(s) (i.e., Individual, Affiliates, EWL, etc) and if appropriate, the Record Type, where the Demographic Code is to appear for use.
ADD LIST VALUE

If you identified the Demographic as a List Value code, the List Values box automatically appears for you to add the List Code and Description drop-down selection values.

Click the ADD icon and the ADD popup will open.

Note: List Codes can be defined as alpha or numeric character(s) and are used for Custom Reports. The Description is the narrative that appears in the drop-down box and can be printed on Custom Reports.

Here’s an example of List Code values for a Demographic used to identify method of distributing materials: List Code = US and Description = US Mail; List Code = HC and Description = Hand Carried; List Code = PU, Description = Pick-up; List Code = MC, Description = Membership Chair, etc.
**UPDATE DEMOGRAPHIC SETUP**

1. Highlight a row in the grid and click the update icon.

2. The Demographic UPDATE popup will open. This will allow you to modify the Demographic Code Description and the check box indicators. Note: the List Value check box cannot be changed if the Demographic is already in use.

**UPDATE ORG TYPE**

1. Highlight a row in the grid and click the Org Type icon.

2. The Assign Org Types popup will open. This will allow you to select or deselect by clicking in the checkbox in front of the Organization Type(s) (Individual or Organization) where the Demographic is associated.

**UPDATE LIST VALUE**

1. Highlight a row in the grid that has a “Y” in the List Value column. The List Values popup appears.

2. Highlight the List Value row that requires updating and click the List Values EDIT icon.

3. The List Values EDIT popup will open. This will allow you to modify the List Value Description.

**DELETE EXISTING DEMOGRAPHIC SETUP**

1. Click on a row in the grid and click the delete icon.

2. A DELETE confirmation popup will open.

3. If confirmed the Demographic Code selected in the grid will be deleted.

**DELETE EXISTING LIST VALUE**

1. Click on a row in the grid and click the delete icon.

2. A DELETE confirmation popup will open.

3. If confirmed the List Value Code selected in the grid will be deleted.
CUSTOM FYMP SETUP PROCESSING

Custom FYMP Setup allows you to define your state-specific rules for Future Year Membership Processing. This addresses changes to bylaws affecting membership or changing business needs, among other items, that often require mass changes be applied to membership data from one year to the next. The Custom FYMP functions provide the ability to make the following changes during FYMP:

- **Membership Types**: Change all memberships with Type A to Type B.
- **Payment Methods**: Change all memberships with Payment Method A to Payment Method B.
- **Fund Choice**: Do not renew a non-required fund or renew the non-required fund amount from the obligation table.
- **Individual Reduction**: Change an Individual Reduction from A to B or remove it.

Each Custom FYMP type of rule has its own display tab. First click on ‘Custom FYMP Setup’ on the Utilities sub-menu, then select the type of rule you would like to view/add/edit. The grid will open and display any existing rules of the selected type that are defined for your state for the current membership year.

To review rules for the previous membership year, select the prior year from the membership year drop down, and the grid will be repopulated with the correct values. For example— for a FYMP which will occur July 15, 2012 to create the 2012-13 memberships, view the 2011-12 year.
**ADD NEW CUSTOM FYMP SETUP**

From any of the Custom FYMP Setup tabs (Individual Reduction, Membership Type, Payment Method, Fund Choice), click the add icon and the Custom FYMP ADD popup will open with fields appropriate for the type of rule displayed in the grid.

**Individual Reductions** are copied from Current Year to Future Year unless a Custom FYMP Instruction is created to “clear” the Individual Reduction or changed to a different Individual Reduction. Use Custom FYMP instructions if you do NOT want an Individual Reduction to be copied.
Individual Reduction Add Popup:

<table>
<thead>
<tr>
<th>Add a new row</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recipient Type Select</td>
</tr>
<tr>
<td>Recipient Org</td>
</tr>
<tr>
<td>Mship Level Select</td>
</tr>
<tr>
<td>Mship Type</td>
</tr>
<tr>
<td>From Value</td>
</tr>
<tr>
<td>To Value</td>
</tr>
<tr>
<td>Fund Cd</td>
</tr>
</tbody>
</table>

**Membership Types** are copied from Current year to Future year. You may have types you wish to change for the Future Year, such as a potential type to a membership type, or a half time member type to a full time member type.
Membership Type Add Popup:

Membership Payment Methods are copied from the Current Year to the Future Year. You may have one payment method that needs to be a different payment method in the Future Year, for example Cash Installments need to be changed to EFT.

Payment Method Add Popup:
**Fund Choice** is for Non-Required Funds. Standard rules for FYMP are

- Required Funds are always renewed from the Obligation Setup tables.
- Non-Required PAC and Other Funds are always copied from the member’s CY record.
- Non-Required Dues are not renewed at all.

Use Custom FYMP **Fund Choice** instructions if you:

1. Do NOT want Non-Required PAC and Other Funds to copy.
2. Or, if you want Non-Required PAC and Other Funds to copy from the Obligation Setup table instead of from the member’s CY record:

![Fund Choice Add Popup](image)

**Update Existing Custom FYMP Setup**

From any of the Custom FYMP Setup tabs (Individual Reduction, Membership Type, Payment Method, Fund Choice), click on a row in the grid and click the update icon. The Custom FYMP Setup UPDATE popup will open, displaying the fields appropriate for the type of rule displayed in the grid. This will allow you to modify the rule selected in the grid.
**VIEW EXISTING CUSTOM FYMP SETUP**

1. Click on a row in the grid and click the view icon.

2. The Custom FYMP Setup VIEW popup will open. This will allow you to review the data for the Custom FYMP Setup selected in the grid.

To see an alternative view of Custom FYMP rules in the grid, you can export the grid to Excel as described earlier in this guide.

**DELETE EXISTING CUSTOM FYMP SETUP**

1. Click on a row in the grid and click the delete icon.

2. A DELETE confirmation popup will open. If confirmed, the Custom FYMP Setup selected in the grid will be deleted.

**MEMBERSHIP MATERIALS**

This section of Utilities deals with setups of member cards and labels, and updates to Continuous rosters.

**ROSTER LANGUAGE MAINTENANCE**

You may choose to print custom text on the first page of the Continuous and Renewal Rosters. This includes required Political Action Contribution Disclaimer language, and publication subscription language. This language should be reviewed for current election law compliance and be updated prior to printing Continuous or Renewal Rosters.

The Federal Elections Commission (FEC) requires political action committees to use "best efforts" to obtain information about and inform contributors of:

- The political purpose of the PAC
- The member’s right to refuse to contribute without suffering any reprisal
- The making of a contribution not being a condition of employment or membership in the union
- The contribution and the contribution amount is voluntary
- PAC Contributions are not tax deductible.
- The PAC is required to make a "best effort" to obtain the contributors name, mailing address, occupation and employer.

The NEA and State affiliates are also required to provide information to the members describing the portion of dues that are applied to the national and state association publications.
This information is to be printed on all membership rosters and forms. The PAC and Publication Language will be
printed on the roster's lowest level sort break. For example, if you are sorting on State/Local/Employer/Work
Location, the PAC and Publication will print on a separate page when a change in Work Location is detected.

1. Enter text in each area.

2. Click Save.

**WEEKLY AUTO GENERATE**

The Auto Generate function provides a facility for automatically capturing membership adds and renewals in order
to produce SEA and/or NEA cards and labels without having to enter the checkmarks in the online membership
screen.

There are four internal flags that the system turns on in the member’s record. They are:

- Card Add
- Card Renew
- Label Add
- Label Renew

Each state determines the internal flag setting for “Adds” and “Renewals”. If cards are to be produced for all the
members who are added and renewed, the “Card Add” and “Card Renew” boxes would be checked in the Auto
Generate screen. Then each time a member is added or renewed, these flags will be set in the member’s record.
The weekly card/label program will capture the member record for weekly printing. It will not capture these
records unless the Auto Generate indicators are set or check marks are set through MOE/MEX screens.
The four internal flags and the two online screen flags are set on the individual member record. All flags are cleared at the time a card or label is generated for the member during the weekly run.

If you use the Auto Generate function, the two online membership screen flags, “Weekly Memb Card” and “Label”, need to be checked only when you want to produce a card/label for a member who wasn’t added or renewed.

If you want cards for your new members only, you would check the “Card Add” box.

If you want labels for select members only, you would not have the SEA Label Add or Label Renew flags set in the Auto Generate screen. Instead, you would check the online screen flags for the specific members in MOE or MEX.

1. Update the indicators as needed
2. Click Save.

NEA Weekly Group

NEA produces cards for new Retired Life members, new Pre Retired Subscribers, a few new and renewed members who come directly to NEA Headquarters staff, and label files for Students who join through the internet. NEA staff maintains various “NEA Group” setups to enable the selection of these members nationwide.

In the Weekly Group Set up function, a set up is created for each of these types of cards. For example:
<table>
<thead>
<tr>
<th>Set Up Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>NEA-RET</td>
<td>NEA Retired Life cards (new)</td>
</tr>
<tr>
<td>NEA-STU</td>
<td>NEA Web Student labels</td>
</tr>
<tr>
<td>NEA-DI</td>
<td>NEA Direct Members</td>
</tr>
<tr>
<td>NEA-RT</td>
<td>NEA Retired Replacement cards (to replace lost cards)</td>
</tr>
</tbody>
</table>

After a Group Set Up has been created, NEA Staff will create a Weekly Card Set up for every State Affiliate in order to select the applicable memberships from every state.

These Set up names will be used in the Member Card server job to select and produce the appropriate cards.
VALIDATION TABLES

The Validation Tables control the data items shown in all drop down menus throughout IMS. NEA maintains the information in the Validation Tables. When you click on 'Validation Tables' on the Utilities sub-menu, the grid will open where you can view the Codes and Descriptions that are used to validate and populate the field drop-down selection lists throughout the system.

ROLES STRUCTURE

The Master List of Role Definitions is maintained by NEA staff. Role Definitions are composed of Categories (for example, Committee, Governance), Subcategories (for example, Membership, Budget, Board of Directors, and Officers), and Positions (for example, Member, Chair, Liaison). State users pick their desired roles from the Master List.

ROLE CATEGORIES

A Category is a major grouping for similar role definitions. Each Category is unique. A Category cannot be edited or deleted once it has been used in a Role Definition.
Add Category

1. Click

2. The new Category pop up appears.

3. Enter the Category name.

4. Click Submit

ROLE SUBCATEGORY

A Role Subcategory is a minor grouping of Role Definitions within a Category. For the Category of “Governance” the Subcategories are “Officers” and “Board of Directors”. For the Category of “Committee” the Subcategories might be “Elections”, “Budget”, “Grant”. Subcategories must be unique. A Subcategory cannot be edited or deleted once it has been used in a Role Definition.
Add Subcategory

1. Click .

2. The new Subcategory pop up appears.

3. Enter the Subcategory name.

4. Click Submit

ROLE POSITION

A Role Position identifies the status of the individual in the Role Definition. Common Role Positions are “Member”, “Chair”, “President”, “Director”, and “Volunteer”. Each Position must be unique and cannot be edited or deleted once it has been used in a Role Definitions.
Add Position

1. Click .

2. The new Position pop up appears.

3. Enter the Position name.

4. Click Submit.

ROLE DEFINITIONS

A Role Definition is the formal name for a “role” assigned to individuals. Each Role Definition is composed of one Category, one Position and sometimes one Subcategory. Subcategory is not always needed to define the role. Each Role Definition must be unique in the composition of the three elements.

Once created a Role Definition is assigned to organizations as applicable. Some roles are applicable to NEA, SEAs, or LEAs. Some are applicable to Groups in Affiliates, some to UniServ Units, and some to Employers.
To add a new Role Definition:

1. Click the Add row icon. A pop up will appear.

2. Enter the role description.

3. Check the VIP indicator if applicable- note this is seldom used.

4. Select the applicable Category from the drop down.

5. Select the applicable Sub Category. Note Sub category is not always needed.

6. Select the applicable Position. Note the combination of Category, Sub Category and Position MUST Be Unique.

7. The Start Date Defaults to the current date.
8. Click **Add the row**.

9. The newly saved Role definition is highlighted on the page.

10. Click the Org Type link to see a pop up of the organization types to assign to the role definition.
11. Check the applicable organizations for this role definition.

12. Click Save.