# TABLE OF CONTENTS

- Introduction to Labels/Rosters ................................................................. 3
- Membership Rosters and Labels ................................................................. 4
- Roles Roster and Labels ............................................................................. 10
**Introduction to Labels/Roster**

This functionality provides authorized IMS users with the ability to produce simple rosters and mailing labels for a group of members or leaders (Roles) which the user has access to view.

1. Hover your mouse pointer on the tab on the IMS navigation bar and then click on **Labels/Roster**. **Report Submission** and **Report Status** will be available in a future release.

2. This feature is available only to those who have **Labels/Roster** privileges in IMS. If you do not have privileges, you will not have access to **Labels/Roster**.

3. After clicking on Labels/Roster, the **IMS – Membership Rosters and Labels** page is displayed for you to enter search criteria. The criteria page for Membership based rosters and label is the default. Click on the **Roles** tab to select Role based rosters and labels. Click on the **Members** tab to return to the Membership rosters and labels page.
Membership Rosters/Labels

1. The search options are similar to the criteria available from the Search By Affiliate page under Individuals (see the Individual Inquiry User Guide for more information on using the Search by Affiliate retrieval screen).

2. First, select your required type of output from the Labels/Roster selection list. There are two membership rosters and two different Avery layouts (5160 & 5351) for the 3-up mailing labels. The Basic Roster is the default selection. The rosters and labels are produced in Acrobat Reader (.pdf) format.

3. Next, select the sort Order for your roster or labels from the selection list. The sort order default is By Local/Chapter/Name (Member Name). The sort options are:

4. Check the suppress Undeliverable Addresses box to exclude records with the address override set to undeliverable.

5. State affiliate, UniServ, Local, Chapter, Employer and Work Location are available to define your search. Depending on the level of your Login, the system will populate the State Affiliate, UniServ and/or Local and Chapter with the association name(s).
6. Enter your selection criteria. Optionally you may click on **Class Search** or **Advanced Search** to further define your search.

7. Click on the **Class Search**. The Membership Classes by level (NEA and SEA) are displayed. The classes are divided into four groups -- Members (i.e. Active, Retired, Student), Agency Fee Payers, Non-Member/Potential members and Service Contracts.

   This is an alternative to searching by Membership Types. You can select a specific class (i.e. Active) or Ctrl+click to select multiple classes. The association logic between classes is "OR", meaning that records that have any of the types selected with be returned. If the Local is not selected or the LEA level of membership is not maintained in I&A, LEA Class selection will not be available.

8. Click on the **Advanced Search** to search by Membership Year, Membership Status, Renewal Indicator, Continuous Indicator, Cancel Reason, Payment Method, Demographics and Membership Types.

9. Select **Membership Year**. The default is for current year. Prior and future years are also available via the drop down.

10. Select **Membership Status**. The default is for Effective memberships. Canceled or Both (Canceled and Effective) statuses are also available via the drop down.

11. Select **Renewal Indicator**. The default is for Both (Renewed and Unrenewed). Renewed or Unrenewed are also available via the drop down.

   **TIP:**
   - to get a list of prior year (e.g. 2006-2007) members who have not renewed for the current year (e.g. 2007-2008), be sure to select the **prior** year in the Membership Year drop down and select **Unrenewed** from the Renewal Indicator drop down.

12. Select **Continuous Indicator**. The default is for Both. Yes (Continuous) or No (Non-Continuous) are also available via the drop down.

13. Select **Cancel Reason**. When Membership Status of **Cancelled** is selected, a drop down of membership cancel reasons is presented. The default is for **ALL** reasons to be selected. Click on a reason to limit search to memberships cancelled for the selected reason. To select more than one reason, hold down the Ctrl key and click the reasons.

14. Select **Payment Method**. To limit obligations to those with a specific payment method, click on the payment method in the drop down list. Any obligation with the selected payment method will be included.

15. Select **Demographic**. Enter or select a value when searching by Demographics. You may search by a demographic field and specific value or by a demographic field and the absence of a value.

   You will see all demographics in the drop-down for which you have access. The rule for demographic access is the following: You will see all demographics defined as global above your organization level, all demographics setup at your organization level and all demographics setup below your organization level. For example: a State Affiliate User will
see all NEA demographics defined as global and all demographics at the state level and local level. (Note: To see Local demographics, the local must be selected)

- If the demographic field was defined as a range demographic, a drop-down will be presented with the defined valid values. Select from the drop-down list for the search value or do not select a value to search for the demographic with the absence of a value.

- If a demographic field was not defined as a range demographic, a value field will be presented for you to key the value you want to search on. An input mask will be displayed below the field to aid you in keying the correct format. The value keyed must match the input mask.

You can search for up to 5 demographics at a time. Use the icon to add additional demographics and the icon to remove demographics. Demographics are removed from the bottom up.

When searching for multiple demographics, you have the option of using the AND or OR (default) operator between them.

16. Select **NEA Type, SEA Type, LEA Type.** The default is for ALL Types. You can select a specific type or Ctrl+click to select multiple types. The association logic between types is "OR", meaning that records that have any of the types selected will be returned. If the LEA level of membership is not maintained in I&A, LEA Type selection will not be available.

**Tip:**

- Please limit your search by selecting to the local or employer or work location level.
6. In this example, the selection criteria entered is to retrieve all the effective Active members for the 2007-08 membership year in this one local.

7. Click **Submit** to execute the query.

8. A File Download screen will be displayed. Click the **Open** button and the roster or mailing labels will be displayed on the page for your review. Click the **Save** button
9. When you open the roster or labels, the output will be in an Acrobat Reader (.pdf) format. Review the output. When satisfied, click on the print button to print. You can also save the output from the Adobe screen.

10. To ensure proper alignment when printing mailing labels, make sure the settings under **Page Handling** on the Adobe Acrobat Reader Print screen are as follows:

- **Page Scaling** is set to ‘None’.
- **Auto-Rotate and Center** checkbox is not marked.

11. Use the close button to return to the Search by Affiliate page. You may change your search criteria, produce different output for the same search criteria or use the IMS Navigation bar to move to another section of IMS.
Basic Membership Roster

This roster contains State Affiliate, Local Affiliate, Member Name, IDs (Individual ID, SSN4, Alt ID), Primary Address, Primary Phone and Primary Email, Membership Types (NEA, SEA, LEA), Chapter Name & User Id, Employer Name & User Id, Work Location Name & User Id, Position, Subject and Work Location Phone. The date the roster was produced and a count of the number of members included in the report are displayed in the heading of each page. The user ID for the individual who produced the roster is in the footer of each page.

**NOTE on Social Security Numbers:**

For all the rosters, downloads and extracts, only SSN4 is displayed for users with full or partial member privacy access. Users with no access to member privacy data will not see SSN4 on the rosters, downloads and extracts.

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

This roster contains State Affiliate Name, Local Affiliate Name & User Id, Member Name, IDs (Individual ID, SSN4, Alt ID), Primary Address, Primary Email, Primary Phone, Work Location Phone, Chapter Name, Employer Name, Work Location Name, Membership Types (NEA, SEA, LEA), all the member’s Dues & Fees and Payment Methods. The date the roster was produced and a count of the number of members included in the report are displayed in the heading of each page. The user ID for the individual who produced the roster is in the footer of each page.

<table>
<thead>
<tr>
<th>Name</th>
<th>SSN ALT/ID</th>
<th>Address</th>
<th>Email</th>
<th>Phone</th>
<th>Chapter</th>
<th>Employer</th>
<th>Work Location</th>
<th>NEA</th>
<th>SEA</th>
<th>Amount</th>
<th>Payment</th>
</tr>
</thead>
<tbody>
<tr>
<td>REED, JAMIE</td>
<td>3205552137</td>
<td>123 Main St</td>
<td><a href="mailto:jamie@school.com">jamie@school.com</a></td>
<td>555-123-4567</td>
<td>NEA</td>
<td>School</td>
<td>Work Location</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SMITH, JOHN</td>
<td>5555555555</td>
<td>456 Oak Rd</td>
<td><a href="mailto:john@school.com">john@school.com</a></td>
<td>555-789-0123</td>
<td>SEA</td>
<td>School</td>
<td>Work Location</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

User: MEMOMAP - Confidential Data - Protect the use and storage of this data

Page 1 of 1
Membership Labels

Each mailing label contains Individual ID, Member Name and primary Address. Mailing Labels can be produced as standard labels (3-up) on Avery 5160 or Avery 5351 stock.

<table>
<thead>
<tr>
<th>Membership Name</th>
<th>Individual ID</th>
<th>Membership Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>Peggy Ritchiemond</td>
<td>0002512371</td>
<td>1 The Street</td>
</tr>
<tr>
<td></td>
<td></td>
<td>91000, OK 74460-9485</td>
</tr>
<tr>
<td>Vicky McCammond</td>
<td>0002521042</td>
<td>5 Any Street</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Tahlequah, OK 74460-9482</td>
</tr>
<tr>
<td>Phyllis Rockmond</td>
<td>0002536104</td>
<td>12 Any Street</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Stillwell, OK 74460-9481</td>
</tr>
<tr>
<td>Ada Cannonie</td>
<td>0003789072</td>
<td>8 Any Street</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Tahlequah, OK 74460-1191</td>
</tr>
<tr>
<td>Michael Wolfmond</td>
<td>0005722225</td>
<td>34 Any Street</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Tahlequah, OK 74460-3127</td>
</tr>
<tr>
<td>Kim Davidmonde</td>
<td>0005919191</td>
<td>12 Any Street</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Stillwell, OK 74460-9478</td>
</tr>
<tr>
<td>James Dolby Jr</td>
<td>0006192368</td>
<td>1201 Main St</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Fairfax, VA 22033</td>
</tr>
<tr>
<td>Lucifer Satany</td>
<td>0006192322</td>
<td>8201 Greensboro Dr</td>
</tr>
<tr>
<td></td>
<td></td>
<td>McLean, VA 22102-3843</td>
</tr>
</tbody>
</table>
Roles Rosters/Labels

1. First, select your required type of output from the **Labels/Roster** selection list. The default is Roster. The labels and roster are produced in Acrobat Reader (.pdf) format.

2. Next, select the sort **Order** for your roster or labels from the selection list. The sort order default is By Individual Name. The sort options are:
   - by Name
   - by Role/Name
   - by Organization/Name

3. Check the [ Suppress Undeliverable Addresses: ] box to exclude records with the address override set to **undeliverable**.

4. Depending on the level of your login, the system will populate the State Association, UniServ and Local Association names, or NEA Headquarters for NEA level users. The roles displayed on the right side will relate to your level. Generally you will not need to make any other organization selections before selecting the roles applicable to your organization.

5. Select **State Affiliate**, **UniServ**, or **Local** as needed for your report by clicking on the down arrow. Results will be limited to role assignments for levels within the state association.

6. Wait for the screen to refresh after each organization selection prior to making a selection for a subsequent organization or prior to clicking **Submit**.

7. At least one role must be selected before clicking **Submit**. To select more than one role, hold the Ctrl key while you choose your selections with a left click of the mouse.
8. When only State is selected, the roles in the selection box will be those associated to the entire state. State level roles will list first, followed by UniServ, local, and group roles. You may select from one to twenty roles from the list (one or multiple levels) for one report. An example, if you select LOC-PRESIDENT you will extract data for all the local presidents in your state.

9. When State and UniServ is selected, the roles in the selection box will be for the UniServ and below. UniServ level roles will list first in alphabetic sequence, followed by local roles. You may select from one to twenty roles from the list (one or multiple levels) for one report. When local level roles are selected here the extract will include roles for all local associated to the UniServ. An example, if you select LOC-PRESIDENT you will extract all the local presidents for the locals under the UniServ.

10. When State, UniServ and Local are selected, the roles in the selection box will be for the Local and below. Chapter level roles will list first, followed by Local level roles in alphabetic sequence. You may select from one to twenty roles from the list (one or multiple levels) for one report. When local level roles are selected here the extract will include roles for only the specific local. An example, if you select LOC-PRESIDENT you will extract only the one president for the local.

11. When NEA Headquarters is selected the roles in the selection box will be nation wide. NEA users will see NEA level roles, followed by State, UniServ, local, and group roles level roles. An example, if STAFF-PRESIDENT is selected the report will contain the Presidents for all state associations.

12. The default selection criterion returns those with effective role assignments. Membership is not part of the criteria.

13. The optional Advanced Search Options will enable you to refine your search to include those who also have some membership criteria.

<table>
<thead>
<tr>
<th>Membership Year:</th>
<th>07-08</th>
<th>NEA Membership</th>
</tr>
</thead>
<tbody>
<tr>
<td>Membership Status:</td>
<td>Effective</td>
<td>SEA Membership</td>
</tr>
<tr>
<td></td>
<td></td>
<td>LEA Membership</td>
</tr>
</tbody>
</table>

14. Advanced Search enables you to select on:
   - **Membership Year**: Current, Prior or Future Year
   - **Membership Status**: Effective, Cancelled or both
   - **Membership Level the Advanced criteria pertains to**: (NEA or SEA or LEA)

15. In general if you are selecting State level roles, your Advanced Search criteria would check SEA Membership. If your Roles selection is for Local level roles, your Advanced Membership criteria would check LEA Membership. Note that some state associations do not record Local membership type in the database, therefore, use the LEA Membership check with caution.

12. Click **Submit** to process your request.
13. A File Download screen will be displayed. Click the Open button and the roster or mailing labels will be displayed on the page for your review. Click the Save button to save your output to your local or network drive. Click the Cancel button to close the File Download screen.

![File Download Screen]

14. When satisfied with your output, click on the print button to print. You can also save the output from the Adobe screen.

15. To ensure proper alignment when printing mailing labels, make sure the settings under Page Handling on the Adobe Acrobat Reader Print screen are as follows:

- **Page Scaling** is set to ‘None’.
- **Auto-Rotate and Center** checkbox is not marked.

![Page Handling Settings]

16. Use the close button to return to the Search by Affiliate page. You may change your search criteria, produce different output for the same search criteria or use the IMS Navigation bar to move to another section of IMS.
### Roles Roster

The roster contains the individual's name, ID, Role Assignment Name, email, phone and address assigned to the role, the Originating Organization of the Role, the Represented Organization and Role Start and End Dates.

<table>
<thead>
<tr>
<th>Name</th>
<th>Individual ID</th>
<th>Email</th>
<th>Address for Individual</th>
<th>Phone/Owner ID</th>
<th>Role Assignment Name</th>
<th>Role Begin / End Date</th>
<th>Originating Org/Type</th>
<th>Representing Org/Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>RYEELL, ALLAN</td>
<td>00000000000000</td>
<td>cmall@im النت</td>
<td>777 THIRD ST</td>
<td>DMS MONDES, LA 5009-1901</td>
<td>IND</td>
<td>ASSOCIATION REPRESENTATIVE</td>
<td>08/21/2008</td>
<td>DES MONDES EA / LOC</td>
</tr>
<tr>
<td>THOMPSON, ALLAN</td>
<td>00000000000000</td>
<td>tthompson@im النت</td>
<td>777 THIRD ST</td>
<td>DMS MONDES, LA 5009-1901</td>
<td>IND</td>
<td>ASSOCIATION REPRESENTATIVE</td>
<td>08/16/2005</td>
<td>DES MONDES EA / LOC</td>
</tr>
<tr>
<td>RHONDA ANDERSON</td>
<td>00000000000000</td>
<td>randa@im النت</td>
<td>777 THIRD ST</td>
<td>DMS MONDES, LA 5009-1901</td>
<td>IND</td>
<td>ASSOCIATION REPRESENTATIVE</td>
<td>08/24/1990</td>
<td>DES MONDES EA / LOC</td>
</tr>
<tr>
<td>RONDA BRADLEY</td>
<td>00000000000000</td>
<td>rroden@im النت</td>
<td>777 THIRD ST</td>
<td>DMS MONDES, LA 5009-1901</td>
<td>IND</td>
<td>ASSOCIATION REPRESENTATIVE</td>
<td>07/25/1998</td>
<td>DES MONDES EA / LOC</td>
</tr>
<tr>
<td>MICHAEL BRENNERT</td>
<td>00000000000000</td>
<td>mbennert@im النت</td>
<td>777 THIRD ST</td>
<td>DMS MONDES, LA 5009-1901</td>
<td>IND</td>
<td>ASSOCIATION REPRESENTATIVE</td>
<td>08/11/2005</td>
<td>DES MONDES EA / LOC</td>
</tr>
<tr>
<td>SCOTT BRUGGER</td>
<td>00000000000000</td>
<td>sbrugger@im النت</td>
<td>777 THIRD ST</td>
<td>DMS MONDES, LA 5009-1901</td>
<td>IND</td>
<td>ASSOCIATION REPRESENTATIVE</td>
<td>07/22/1990</td>
<td>DES MONDES EA / LOC</td>
</tr>
<tr>
<td>PAUL BROUSSARD</td>
<td>00000000000000</td>
<td>pbrussard@im النت</td>
<td>777 THIRD ST</td>
<td>DMS MONDES, LA 5009-1901</td>
<td>IND</td>
<td>ASSOCIATION REPRESENTATIVE</td>
<td>08/16/2005</td>
<td>DES MONDES EA / LOC</td>
</tr>
<tr>
<td>STERREY BOJACK</td>
<td>00000000000000</td>
<td>sbojakk@im النت</td>
<td>777 THIRD ST</td>
<td>DMS MONDES, LA 5009-1901</td>
<td>IND</td>
<td>ASSOCIATION REPRESENTATIVE</td>
<td>07/22/1990</td>
<td>DES MONDES EA / LOC</td>
</tr>
<tr>
<td>SHARON BOURBEAU</td>
<td>00000000000000</td>
<td>sbourbeau@im النت</td>
<td>777 THIRD ST</td>
<td>DMS MONDES, LA 5009-1901</td>
<td>IND</td>
<td>ASSOCIATION REPRESENTATIVE</td>
<td>08/16/2005</td>
<td>DES MONDES EA / LOC</td>
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<tr>
<td>JAVEL BOURGEOY</td>
<td>00000000000000</td>
<td>jboego@im النت</td>
<td>777 THIRD ST</td>
<td>DMS MONDES, LA 5009-1901</td>
<td>IND</td>
<td>ASSOCIATION REPRESENTATIVE</td>
<td>07/22/1990</td>
<td>DES MONDES EA / LOC</td>
</tr>
</tbody>
</table>

User: TITALOC5

Confidential Data - Protect the use and storage of this data.
Roles Labels

Each mailing label contains Individual ID, Individual Name, Role Name and Role Assigned Address. Mailing Labels can be produced as standard labels (3-up) on Avery 5160 stock or Avery 5351 stock.