

July 1, 2009

To: Chapter Presidents & Membership Chairs

From: Donna M. Dreith, Chairperson
Fresno/Madera Service Center Council

Subject: Interactive Membership Services (IMS) Training

Please be informed the Membership Accounting Department will provide a Webcast training on the use of Interactive Membership Services (IMS) to assist you in tracking membership. This training is scheduled for Tuesday, August 11, 2009 at the Fresno CTA office located at 5330 N. Fresno Street, and will begin at 4:00 p.m. Presidents and Membership Chairs are encouraged to attend, however, if the local can only send one, it is preferred that it be the Membership Chair. Attendees will need to complete and return the attached General Security Request Form (as per instructions listed below) in order to maximize their participation at the Webcast training.

For your information, Interactive Membership Services (IMS) is a web-based application designed to provide easy access to the membership database, the Individuals & Affiliates (I&A). While the I&A is a complex database, IMS is more user friendly. IMS capabilities include enabling demographic changes, updating roles, producing rosters and labels, and extracting membership data. High Speed Internet connection (DSL or Cable) is required. Following is the specific information for this program:

Hardware: IMS can run on a PC or MAC computer. No other specific hardware is required. High Speed Internet connection (DSL or Cable) is needed to run the application efficiently.

Software: IMS is a web-based application. There is no cost to use the application. You will need to complete a data access security form and submit it to the Membership Accounting Department to obtain application access.

Conversion: Locals should develop a basic plan for comparing data using their existing application, if any, to evaluate and compare data with the I&A. This should be occurring on a periodic basis already; however, this serves as a reminder.

Local Responsibilities: Locals using IMS will accept responsibility for all membership processing in the new application. Training is anticipated to take approximately 60 minutes. The training will include an overview of the application, including updating roles and demographic changes, printing basic rosters and labels, as well as extracting data. The CTA Membership Accounting Department will be available to assist locals with the transition to IMS.

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Support: The Membership Accounting Department will be the primary point of contact for the IMS and will assist in problem/resolution of application functionality issues. Hardware and connectivity issues will be the responsibility of the local.

IMS Webcast participation Information: Web host information will be sent to Sandy Young (CTA Fresno office) upon confirmation of participation.

IMS General Security Request Form: The form is attached for your signature (**both chapter president and membership chair's signatures are required**) and completion of sections A1, A3 and Local Name in section B. Please submit to CTA, Membership Accounting, via fax to: (650) 552-5061 or email to Nicole Burgoa at **nburgoa@cta.org** or Donna Benzola at **dbenzola@cta.org**.

We look forward to having you join us on a webcast. If you have any questions, please contact Nicole Burgoa at **nburgoa@cta.org** (650-552-5217) or Donna Benzola at **dbenzola@cta.org** (650-552-5244).

Please confirm attendance to **nburgoa@cta.org** or **dbenzola@cta.org** with a copy to **syoung@cta.org** no later than August 4, 2009.

Please call Sandy Young at the CTA Fresno office at 559-222-6593 with any questions or for more information.

DMD/sly

Enclosures: General Security Request Form
Agenda

**Interactive Membership Services (IMS)
Webcast Training
August 11, 2009**

AGENDA

1. Overview
2. Access to IMS
3. Availability
4. On-line Help
5. Inquiry
6. Individuals – Processing Changes
7. Affiliates
 - a. Viewing a Role
 - b. Adding & Ending a Role
 - c. Viewing Counts
8. Extracting Data
9. Generating Reports & Labels
10. Questions and Answers