Chapter Portal Tutorial

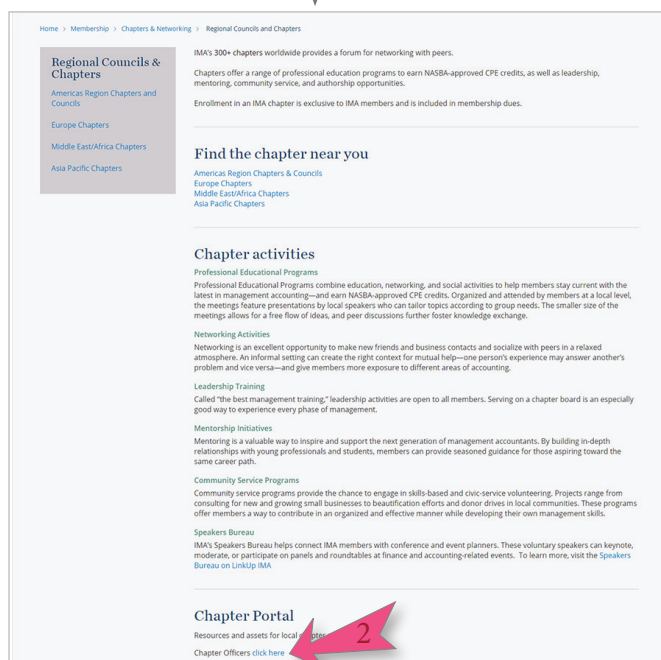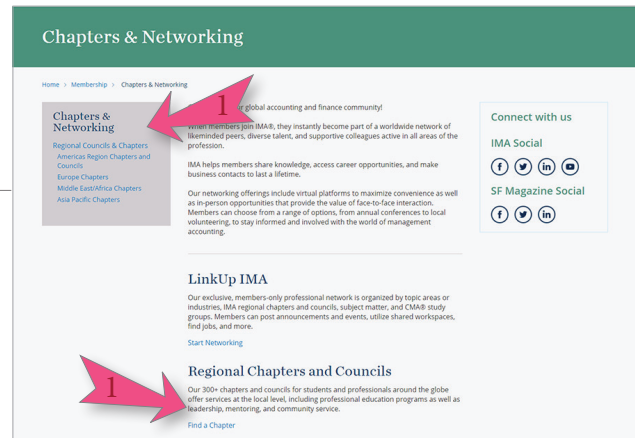# Getting to the Chapter Portal from the IMA Site

To access the **Chapter Portal**, go to www.imanet.org, under the link *MEMBERSHIP* located in the top navigation. Click on the link *CHAPTER & NETWORKING*(*indicated by the arrow.*)

Once on this page, clicking either of the links (*indicated by the arrows(1)*) will take you to the **Regional Councils & Chapters** page.

On this page click on the link under the **Chapter Portal** heading(*indicated by the arrow(2).*) This link will take you to the **Chapter Portal** home page.

Note: Bookmark this page for quick and easy access to the Chapter Portal.

(https://chapterportal.imanet.org/)

Logging in to the Chapter Portal

You will need to login (*if you haven't already*) to use the **Chapter Resources** and **Chapter Tools**. Clicking on these links ***while not logged in*** will bring you to the login page.

*Note: Use your regular **IMA website credentials**.*

IMA CHAPTER PORTAL
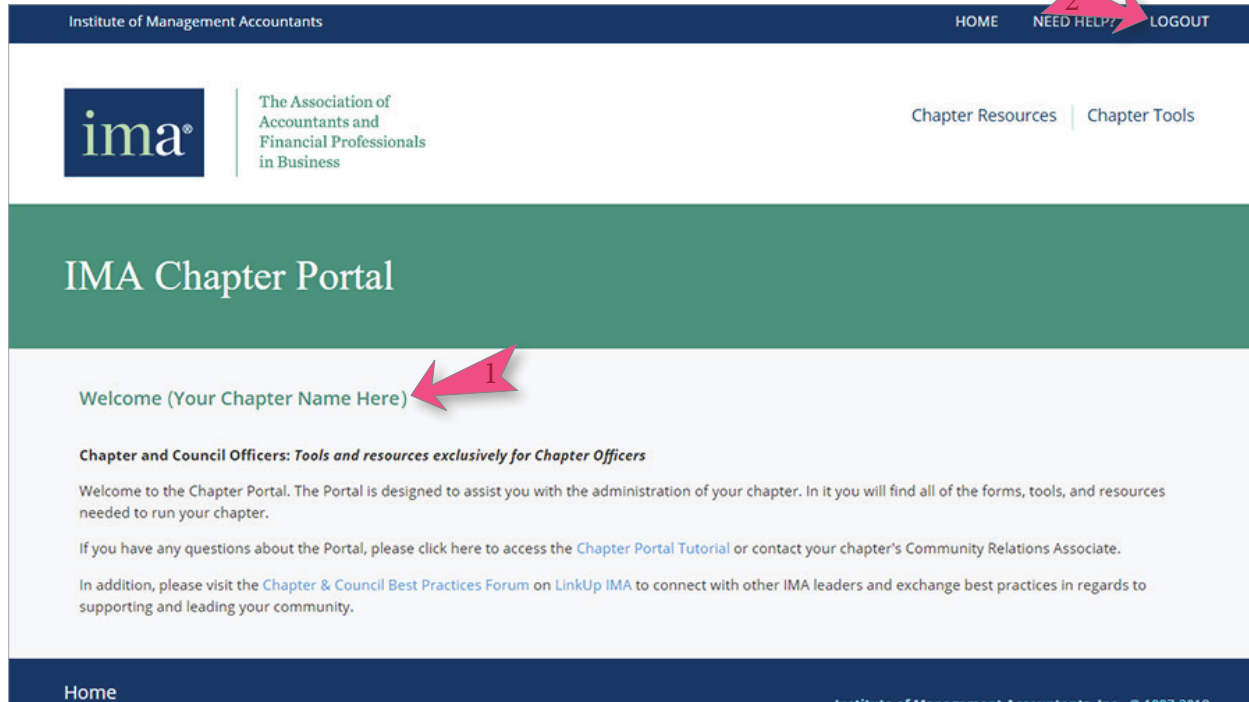
After entering your credentials and logging in you will see the welcome page with your chapter title in the green header(*indicated by arrow(1). Also note the LOGIN link is now LOGOUT indicated by arrow(2).*)

Within the header section(*top section*) you have links to HOME, NEED HELP?, LOGIN/ LOGOUT, CHAPTER RESOURCES and CHAPTER TOOLS. You will have access to these links throughout the site. In the footer you have links to HOME, NEED HELP?, also.

Note: Clicking on the IMA Logo will bring you back to the main IMA site.
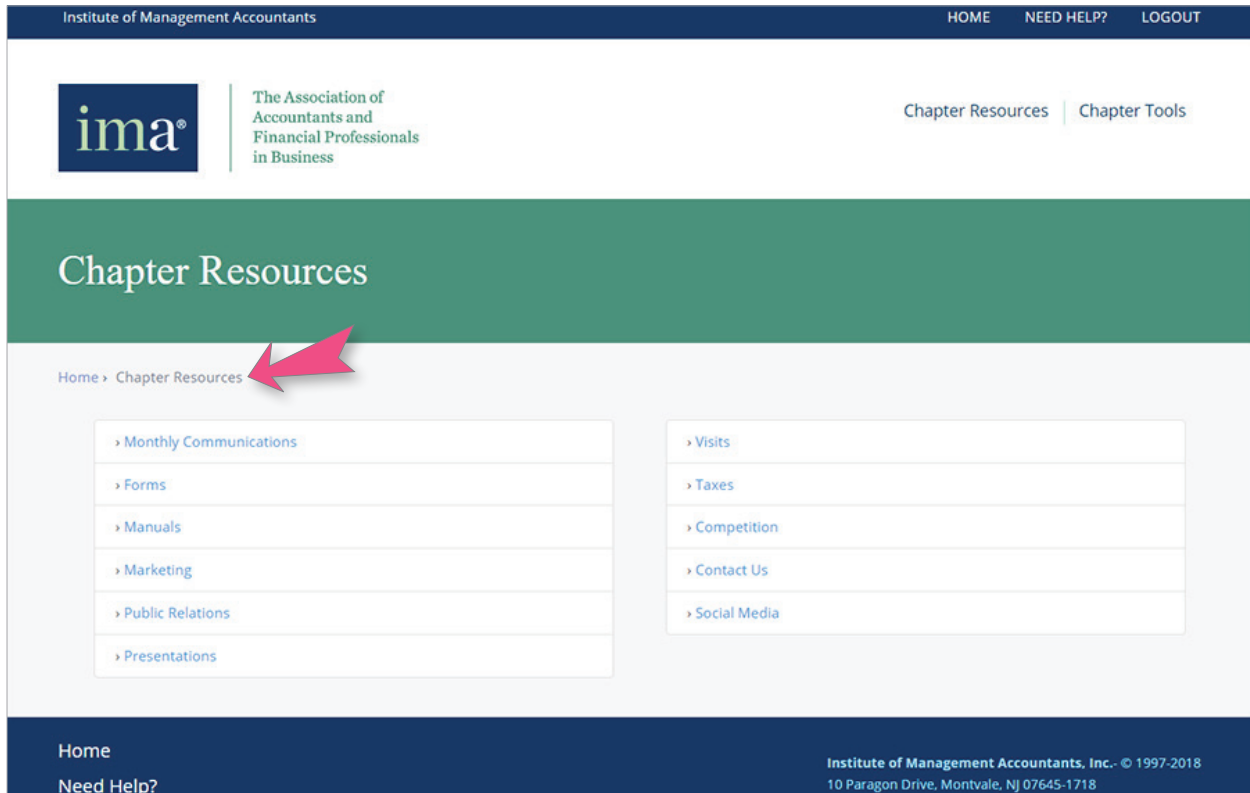
Upon successfully logging in, bookmark this page for quick and easy access(***https://chapter-portal.imanet.org/Home.aspx***) to the **Chapter Resources** and **Chapter Tools**.

The Chapter Portal is divided into two main areas: the **Chapter Resources** section and the **Chapter Tools** section.

Clicking on the CHAPTER RESOURCES link will bring you to the **Chapter Resources** home.

CHAPTER RESOURCES HOME PAGE

You can reach each section by clicking on the links in the table above.

On each page you will have the ability to go back to the previous pages by clicking on the links(*indicated by the arrow*) located under the green header bar.

Here is a brief description of each section:

Monthly Communications
This area contains documents and WebEx playbacks to stay current with IMA's strategic direction, new product offerings, relevant information, and success stories.

Forms
This area contains forms to submit annual administrative documents and other types of documents on time.

Manuals
This area contains chapter & council manuals (*i.e.* Competition and Compensation Guide, Chapter/Council Operations Manuals, Communications Guidelines, Ethic Policies, *etc.*) to help chapters successfully operate and be in compliance with IMA's policies.

Marketing
This area contains appropriate logos, templates for communications, access to the Webstore and Shane Inc. to order marketing materials and gifts for upcoming events.

Public Relations

This area contains local media outreach guidelines and samples for press releases and email blasts.

Presentations

This area contains standard IMA, CMA and student presentations, and WebEx call playbacks for CLEWs trainings and the August Volunteer Leader Workshop.

Visits

This area contains information to plan and request visits from IMA senior leaders including Global Board of Directors and Chairs.

Taxes

This area contains tax FAQs, non-profit status documents and the IRS subordinate form listing IMA chapters/councils.

Competition

This area contains competition related documents such as chapter/council standings, past annual dinner programs, chapter performance reports and current chapter competition goals.

Contact Us

In this section, you will find contact information for IMA's Community Relations Team.
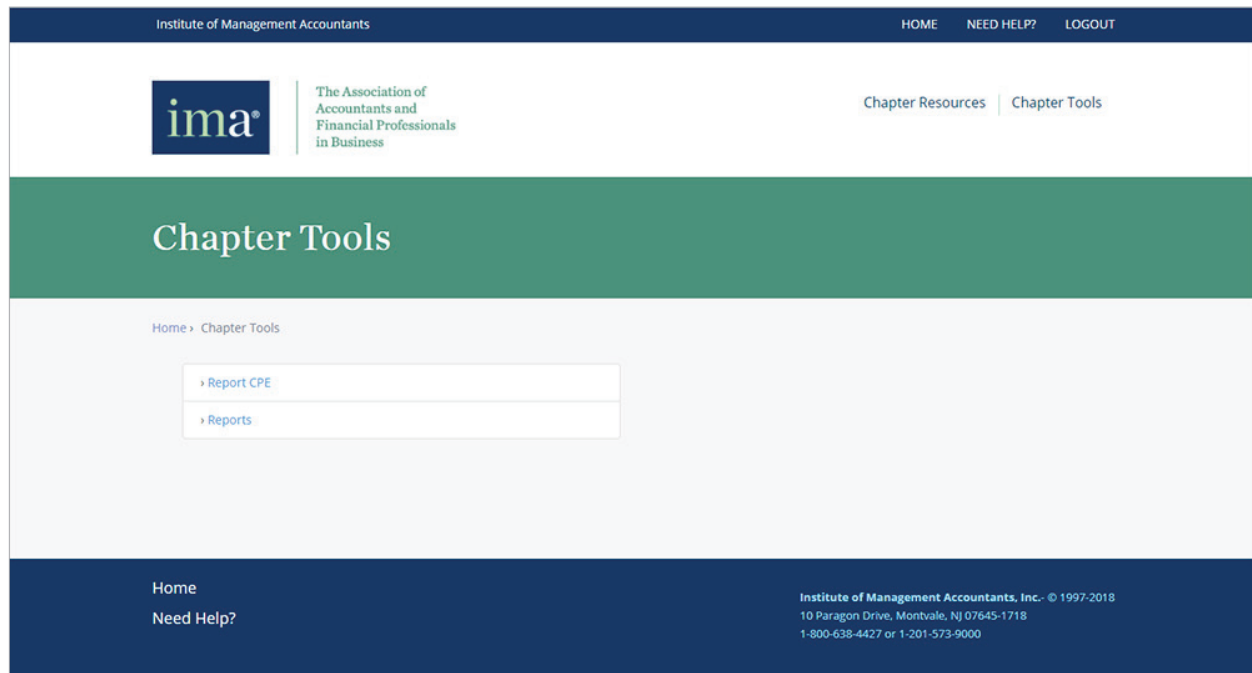
Social Media

This area contains Social media forms and Social media logos for use on your Chapter site.

Clicking on the *CHAPTER TOOLS* link brings you to the **Chapter Tools** home page.

CHAPTER TOOLS HOME PAGE

You can reach each section by clicking on the links in the table above.

On each page you will have the ability to go back to the previous pages by clicking on the links(*indicated by the arrow*) located under the green header bar. Here are brief descriptions of each section:

Report CPE
This tool enables officers to report Continuing Professional Education hours (CPE) members earn. Reporting CPEs is a requirement for the following reasons:

  • Measure chapter success
  • Service to members so they are not forced to report the entries themselves
  • Record keeping in case of an audit (See following for more details.)

Reports
This area contains all of the chapter's monthly membership activities and compensation reports.

Important: *CPE credits must be entered into the Chapter Portal by the **last day of the month the event is held**. If the event is held on the last weekend of the month, CPE credits must be entered by the seventh day of the next month to be counted toward competition and compensation.*

*In order to receive credit for the current competition year CPE credits awarded in the **last week of April** must be reported by **April 30, 2018**, at **11:59 p.m**. EDT. Activities for which competition credit is awarded must take place and be reported during the competition year, **May 1, 2017 – April 30, 2018**.*

You will see a list of all previous reports submitted by the chapter. Click *ADD NEW* to create a new CPE report(*indicated by the arrow*.)

REPORT CPE

Next, you will be taken to the **Report CPE - Event** page. Enter all of your event information.

Report CPE - Event

Home > Chapter Tools > Report CPE > Report CPE - Event

* Event Topic:

* CPE Course Date: Format: mm/dd/yyyy

* CPE Credits for this course PER PERSON:

SAVE & NEXT »

When reporting CPE, please specify the subject of your meeting vs. reporting "technical meetings."

Please note: *Events cannot be entered until after the event has taken place.*

When you are finished, click the *SAVE & NEXT* button.
You will be taken to this page where you can enter attendees. Click on the alphabetical letters to search by member last name(*indicated by the arrow*.)

The Association of
Accountants and
Financial Professionals
in Business

Note: *the list may take some time to load because of it's large size.*

Select the member by clicking on the select box on the left of the member's name(*indicated by the arrow*.)

Click *ADD SELECTED* under the list to add members to the **Selected Members** box.

A review box of selected members will appear on the right (*indicated by the blue circle*) which will enable you to review the list and remove those who were added in error or add those who are missing.

Once all of the attendees have been entered, click the *CONTINUE* button at the bottom of the page.

You will have a chance to enter attendees who are not from your chapter in the next screen after clicking continue.

After you have finished adding attendees **not** from your chapter and are satisfied with the list,

click the *NEXT* button.

Review this page and click *SUBMIT REPORT* to submit this entry.
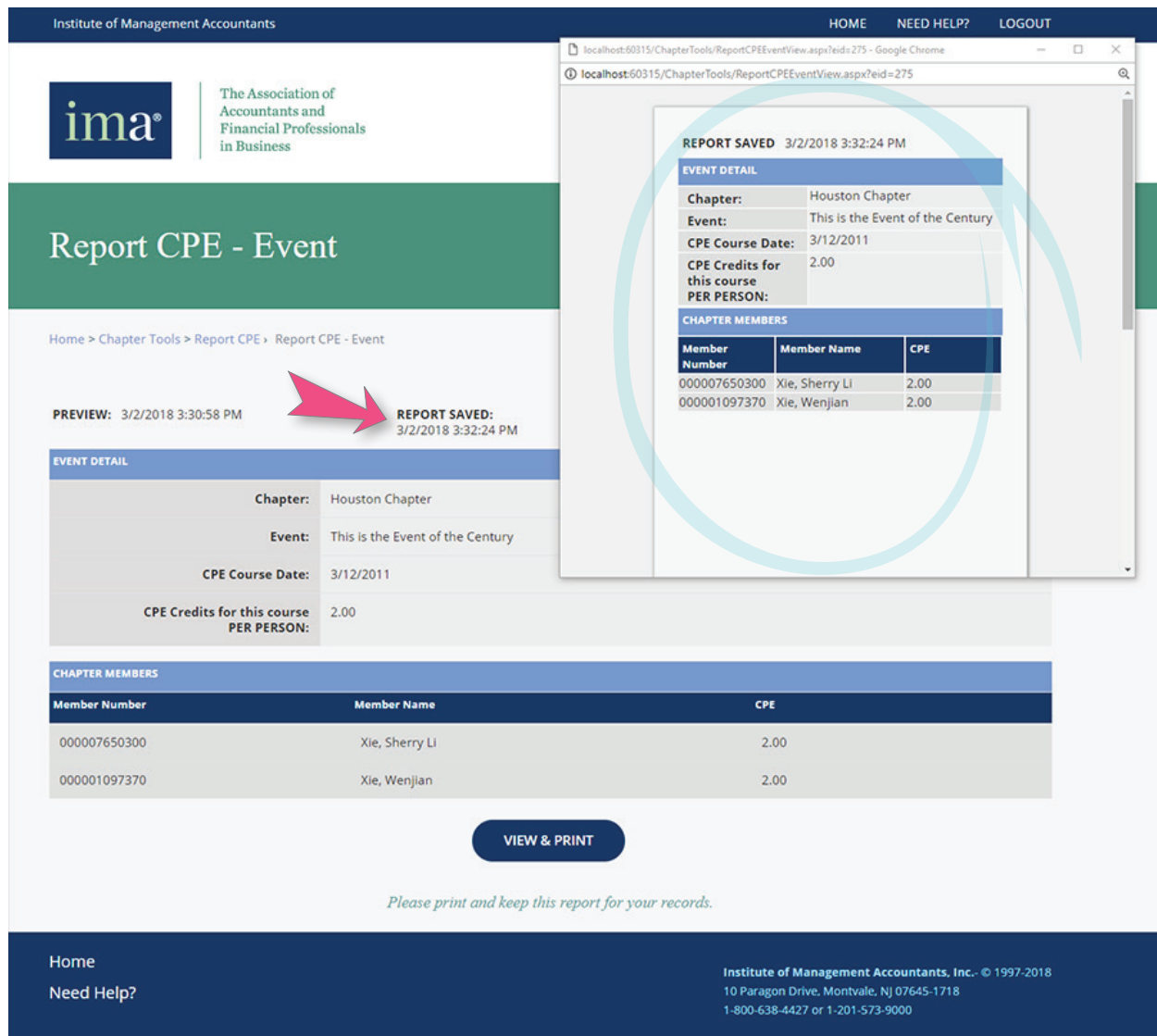
Note: *If later you realize you have missed adding a member, you will need to submit a new report as **saved reports cannot be edited**.*

After submitting the report, you will be taken to the confirmation screen. At the top of the page you will see the words **REPORT SAVED**(*as indicated by the arrow*) and the number of

CPE that have been credited. Click on *VIEW & PRINT* and a pop-up will appear for you to print out this report and save for your records(*as indicated by the circle.*)

Note: *You can click VIEW & PRINT to see a breakdown of the entries by member then print and save the file for record keeping. If you do not see this confirmation page, then the CPE hours were not successfully entered and you have to start again.*

Print this screen and save for your records.

If you have any further questions or comments regarding the **Chapter Portal**, please contact the **IMA's Community Relations Team** for assistance:

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Thank you for time, commitment and service to IMA!