

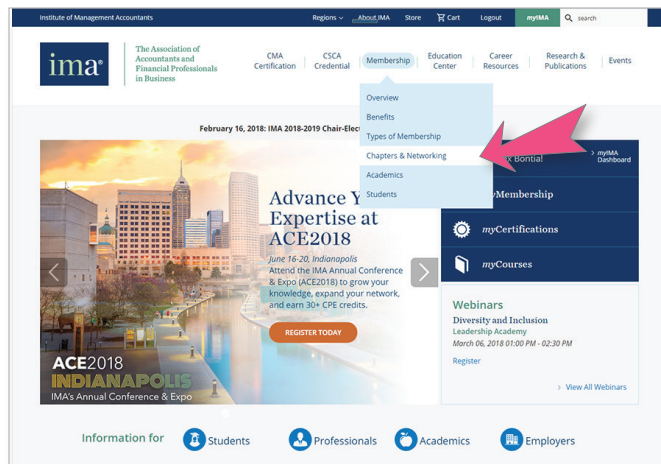


The Association of
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Chapter Portal Tutorial

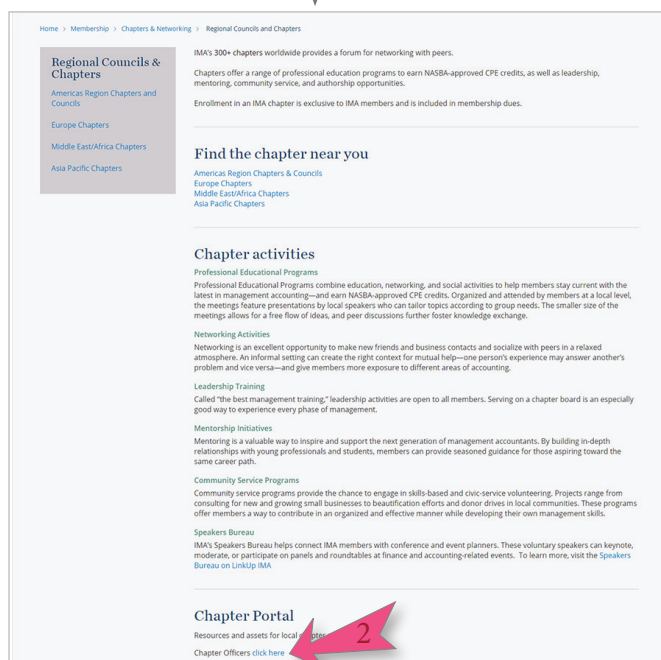
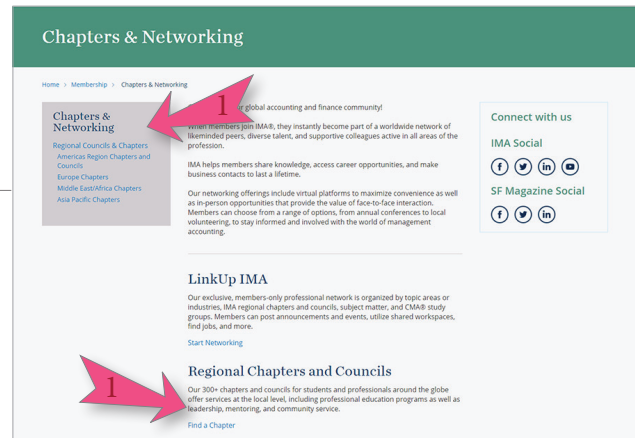


Getting to the Chapter Portal from the IMA Site



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/>)



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Logging in to the Chapter Portal

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HOME NEED HELP? LOGIN

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Chapter Resources Chapter Tools

IMA Chapter Portal

Welcome Houston Chapter

Chapter and Council Officers: Tools and resources exclusively for Chapter Officers

Welcome to the Chapter Portal. The Portal is designed to assist you with the administration of your chapter. In it you will find all of the forms, tools, and resources needed to run your chapter.

If you have any questions about the Portal, please click here to access the [Chapter Portal Tutorial](#) or contact your chapter's Community Relations Associate.

In addition, please visit the [Chapter & Council Best Practices Forum](#) on [LinkUp IMA](#) to connect with other IMA leaders and exchange best practices in regards to supporting and leading your community.

Home
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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.

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Regions About IMA Store Cart MEMBER LOGIN Search

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CMA Certification CSCA Credential Membership Education Center Career Resources Research & Publications Events

Login

Existing Users

User Name:

Your User Name Here

Password:

Remember my login information.

Forgot Password? | Change User Name

SIGN IN

New Users

Create a user profile to enhance your online experience:

- Keep track of your CPE using our free dashboard tool
- Expedite your checkout process
- Save items to a wishlist
- Access LinkUp, IMA's online networking community

REGISTER NOW!

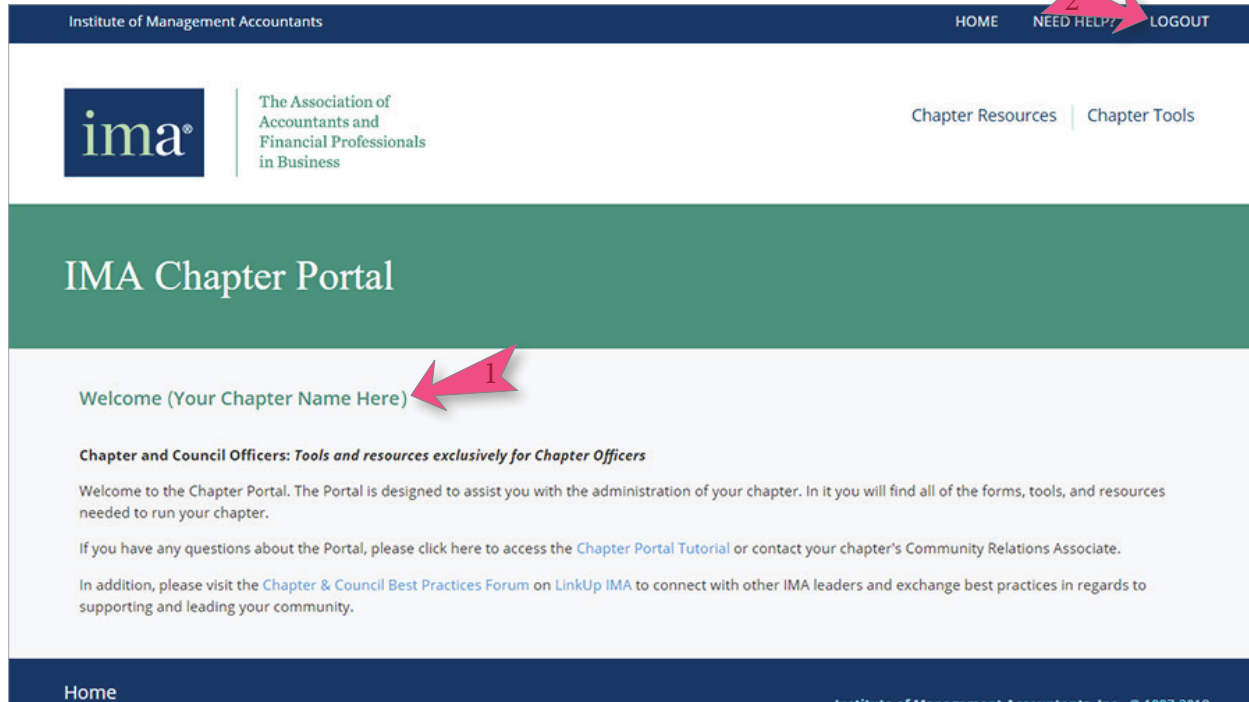
Contact us for further assistance.

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



Welcome to the Chapter Portal

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.

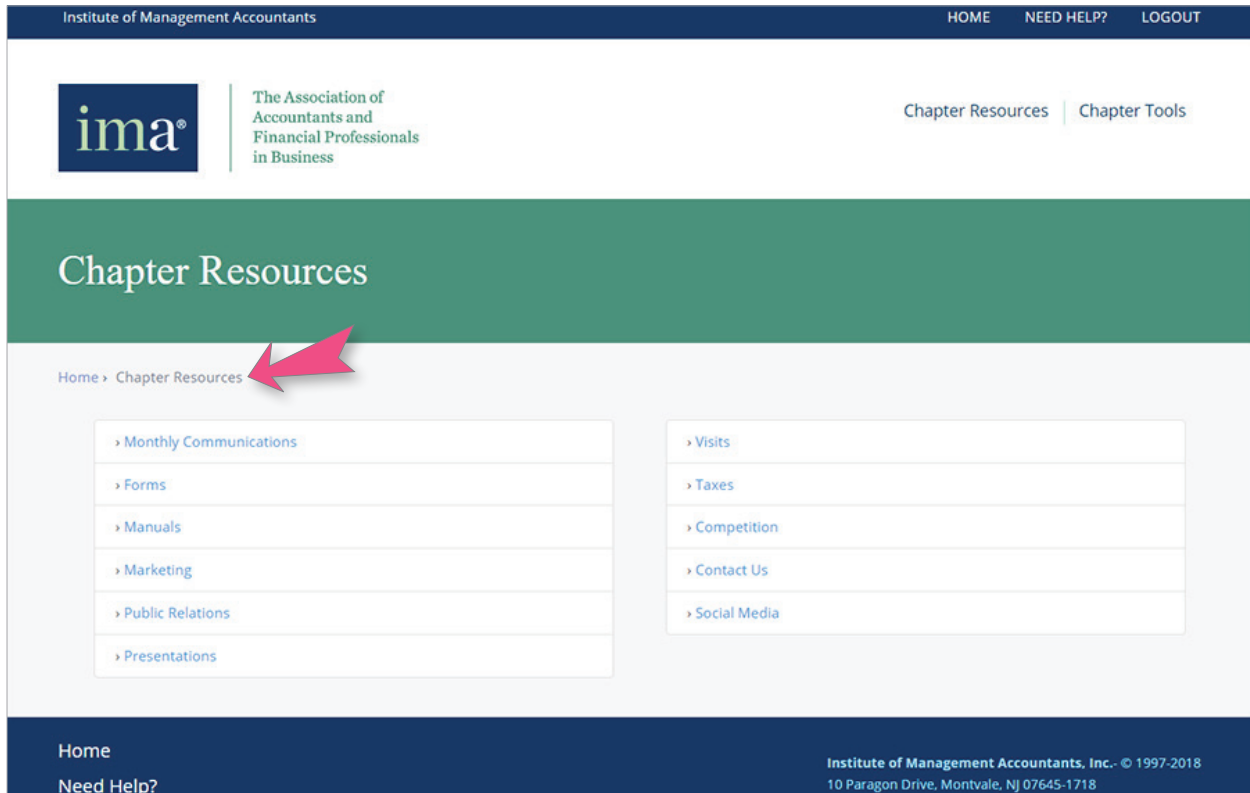
Upon successfully logging in, bookmark this page for quick and easy access(<https://chapter-portal.imanet.org/Home.aspx>) to the **Chapter Resources** and **Chapter Tools**.

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.



Chapter Resources (continued)

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

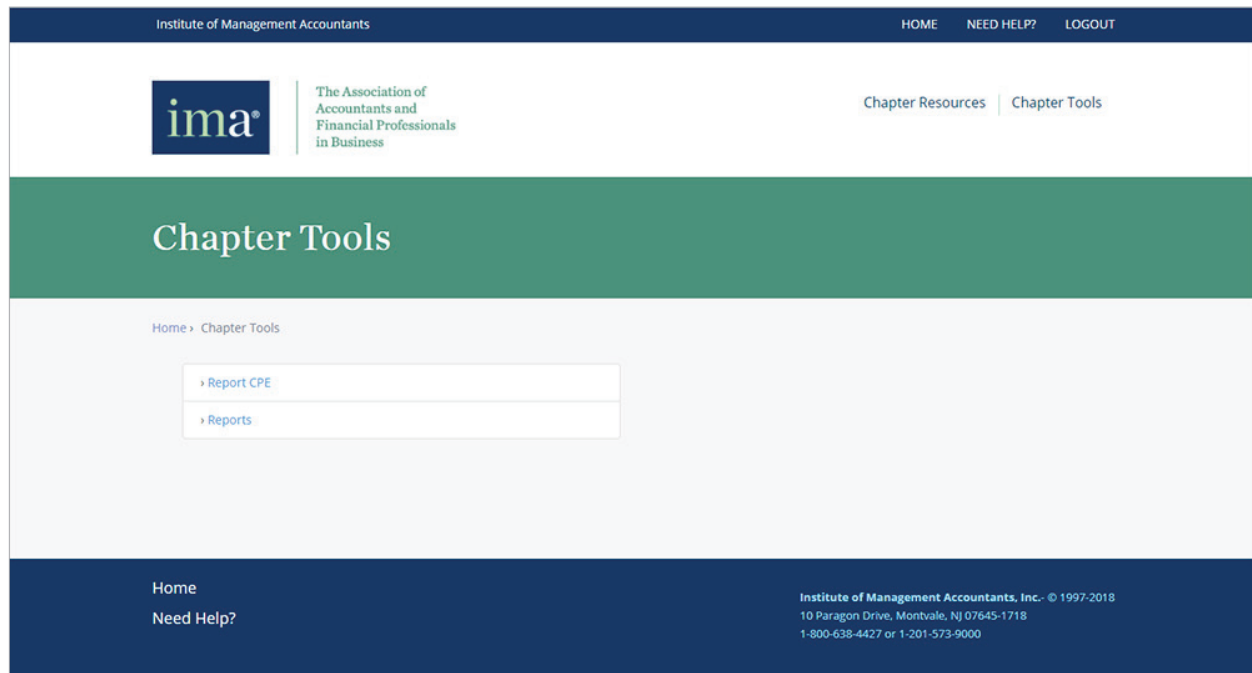
This area contains Social media forms and Social media logos for use on your Chapter site.



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.



Chapter Tools (Report CPE)

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

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Chapter Resources Chapter Tools

Report CPE

Home > Chapter Tools > Report CPE

| Event Name | Course Date | Credits |
|----------------------------------|-------------|---------|
| This is the Event of the Century | 3/12/2011 | 324.00 |
| This is the Event of the Century | 3/12/2011 | 32.00 |
| testing | 2/8/2018 | 3.00 |
| This is the Event of the Century | 3/12/2011 | 324.00 |

ADD NEW

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



Chapter Tools (Report CPE - continued)

Report CPE - Event

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

| | |
|---|---|
| * Event Topic: | <input type="text"/> |
| * CPE Course Date: | <input type="text"/> Format: mm/dd/yyyy |
| * CPE Credits for this course PER PERSON: | <input type="text"/> |

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.*)

Chapter Tools (Report CPE - continued)

Report CPE - Event

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

| | |
|---|----------------------------------|
| Event Topic: | This is the Event of the Century |
| CPE Credits for this course PER PERSON: | 2.00 |

ABCDEFGHIJKLMNOPQRSTUVWXYZ

(Click On A Letter To Display Members In Your Chapter By Last Name)

Must Click "Add Selected" At The Bottom Once Members Are Checked.

(Remove Members On Right-Side That Do Not Belong.)

(Click "Next" Button To Move To Next Step)

SELECTED MEMBERS

REMOVE SELECTED

(List of members selected, you may remove member selected.)

(Check checkbox next to name and click "Remove Selected" to Remove.)

CONTINUE »

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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.*)

Chapter Tools (Report CPE - continued)

Report CPE - Event

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

| | |
|--|----------------------------------|
| Event Topic: | This is the Event of the Century |
| CPE Credits for this course PER PERSON: | 2.00 |

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

| Id | Name | CPE |
|--------------------------|--------------------------|-----|
| <input type="checkbox"/> | 924649 Baer, Jennings A. | 2 |
| <input type="checkbox"/> | 117498 Bahr, Ronald W. | 2 |
| <input type="checkbox"/> | 9008607 Baig, Shaireen | 2 |
| <input type="checkbox"/> | 1159964 Bain, Heather D. | 2 |
| <input type="checkbox"/> | 8203663 Baizabal, Eunice | 2 |

ADD SELECTED

(Click On A Letter To Display Members In Your Chapter By Last Name)
Must Click "Add Selected" At The Bottom Once Members Are Checked.
 (Remove Members On Right-Side That Do Not Belong.)
 (Click "Next" Button To Move To Next Step)

SELECTED MEMBERS

| Name | CPE |
|---|------|
| <input type="checkbox"/> Raina, Rahul | 2.00 |
| <input type="checkbox"/> Raman, Raja | 2.00 |
| <input type="checkbox"/> Ramirez, Alina | 2.00 |
| <input type="checkbox"/> RAMIREZ, KAREN R | 2.00 |

REMOVE SELECTED

(List of members selected, you may remove member selected.)
 (Check checkbox next to name and click "Remove Selected" to Remove.)

CONTINUE »

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,



Chapter Tools (Report CPE - continued)

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Chapter Resources | Chapter Tools

Report CPE - Event

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

| | |
|---|----------------------------------|
| Event Topic: | This is the Event of the Century |
| CPE Credits for this course PER PERSON: | 2.00 |

ADD ATTENDEES NOT FROM YOUR CHAPTER

Member Id:

CPE:

FIND & ADD

(Enter the member id and credits for attendees not from your Chapter.)

(Remove Attendees on right-side that do not belong.)

(Click "Next" button to move to next step)

SELECTED MEMBERS

| Name | CPE |
|----------------|------|
| Xie, Sherry Li | 2.00 |
| Xie, Wenjian | 2.00 |

(List of members selected from your chapter, click here to modify list.)

NEXT »

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click the **NEXT** button.

Review this page and click **SUBMIT REPORT** to submit this entry.



Chapter Tools (Report CPE - continued)

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Chapter Resources | Chapter Tools

Report CPE - Event

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

PREVIEW: 3/6/2018 10:09:24 AM

REPORT SAVED:

| EVENT DETAIL | |
|--|----------------------------------|
| Chapter: | Houston Chapter |
| Event: | This is the Event of the Century |
| CPE Course Date: | 3/12/2011 |
| CPE Credits for this course PER PERSON: | 324.00 |

| CHAPTER MEMBERS | | |
|-----------------|----------------------|--------|
| Member Number | Member Name | CPE |
| 000000020834 | Sahlberg, Jeffrey L. | 324.00 |
| 000001105502 | Salinas, Charles E. | 324.00 |
| 000009876859 | SALINAS, HECTOR | 324.00 |
| 000009623663 | Salinas, Javier | 324.00 |

| NON CHAPTER MEMBERS | | | | |
|---------------------|--------------------|--------------------|-------|--------|
| Member Number | Member Name | Chapter | State | CPE |
| 000000000010 | Pencek, Anthony P. | Providence Chapter | RI | 324.00 |

SUBMIT REPORT

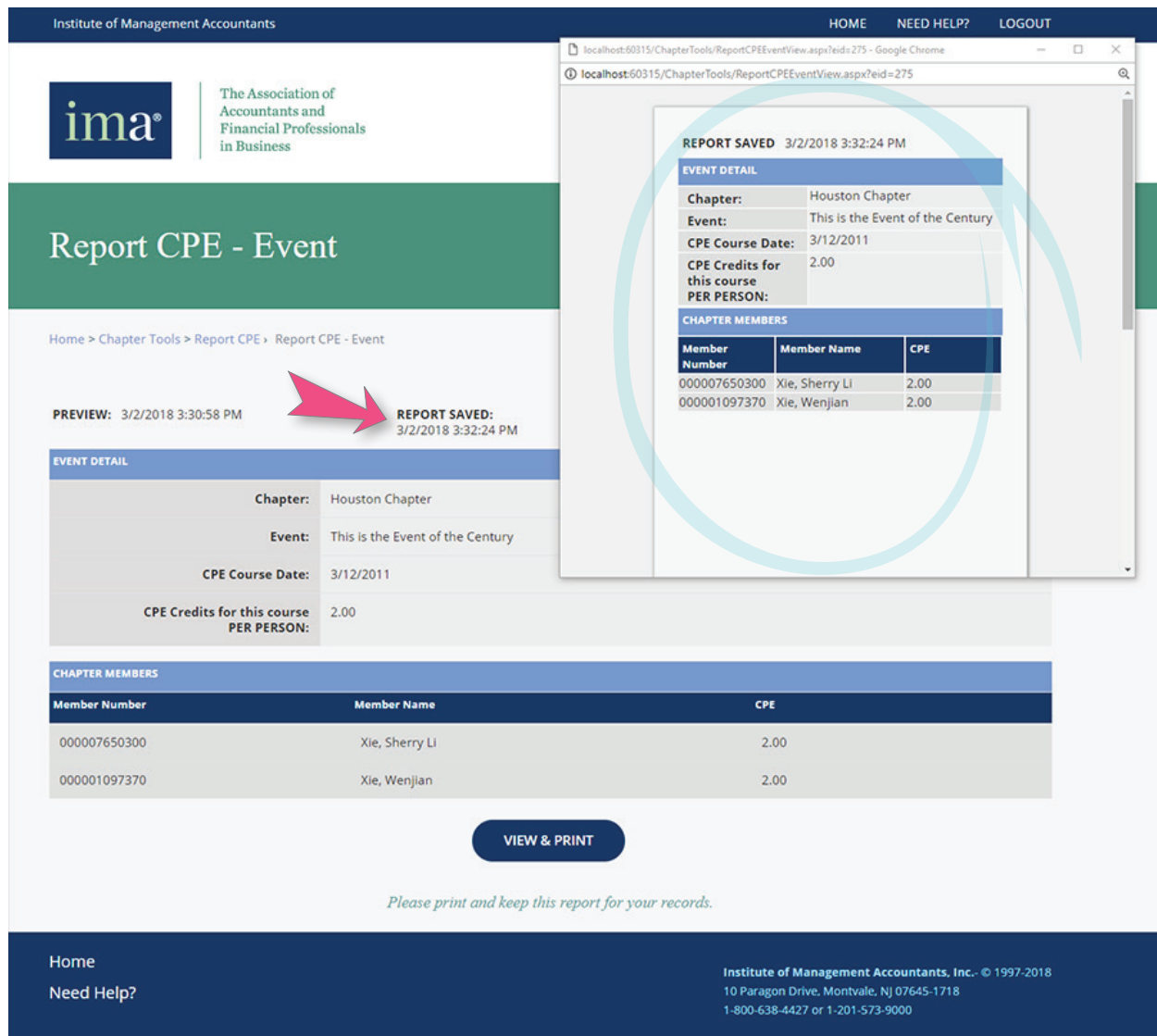
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Note: *If later you realize you have missed adding a member, you will need to submit a new report as **saved reports cannot be edited**.*

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

Chapter Tools (Report CPE - continued)



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Report CPE - Event

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

PREVIEW: 3/2/2018 3:30:58 PM **REPORT SAVED:** 3/2/2018 3:32:24 PM

EVENT DETAIL

| | |
|---|----------------------------------|
| Chapter: | Houston Chapter |
| Event: | This is the Event of the Century |
| CPE Course Date: | 3/12/2011 |
| CPE Credits for this course PER PERSON: | 2.00 |

CHAPTER MEMBERS

| Member Number | Member Name | CPE |
|---------------|----------------|------|
| 000007650300 | Xie, Sherry Li | 2.00 |
| 000001097370 | Xie, Wenjian | 2.00 |

VIEW & PRINT

Please print and keep this report for your records.

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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.



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Contact Us

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

Patricia (Pat) Stefanczyk

VP of Governance and Volunteer Relations

pstefanczyk@imanet.org

(201) 474-1592

Narnesha O'Neill

Community Relations Manager (East Coast areas)

noneill@imanet.org

(201) 474-1537

Wore Giotta

Community Relations Manager (East Coast and Int.)

wgiotta@imanet.org

(201) 474-1524

Tara Barker

Community Relations Manager (West Coast)

tbarker@imanet.org

(201) 474-1535

Providence (Provi) Rao

Partnership and Volunteer Engagement Administrator

prao@imanet.org

(201) 474-1587

General Inbox

communityservices@imanet.org

Thank you for time, commitment and service to IMA!