MEMBERSHIP ADMINISTRATION/REPORTING

The IIA-Institute Agreement (Spanish/French) states that all individual IIA-Institute members are recognized as Global IIA members who are entitled to global member services and benefits. IIA-Institute will report to Global IIA, at least on a quarterly basis, names of all new and dropped members in the requested format to ensure that only institutes' active members are recognized at the IIA Global Headquarters. For details on the membership administration/reporting process, see the Institute Manual or click below on any of the administrative functions of the Membership Administrator:

- The Membership Administrator
- Membership Reporting
- Members Profile
- New Members Registering for Certification through CCMS
- Templates, Welcome Letters and Certificate Samples
- Membership Download Process
- The Membership Management Tool (MMT)

Membership Administrator

It is imperative that each institute have a leader designated as the Membership Administrator to have the capability to download their active member file via the IIA Web site and should report new, drop and reinstated members monthly or quarterly (refer to the institute selection of members services). Institutes will receive membership statistics and reminders on a quarterly basis (by the end of February, May, August and November) for the membership administrator to compare and reconcile their institute membership.

Responsibilities

It is the responsibility of the institute Membership Administrator to compare and reconcile its own membership lists with the lists downloaded from the Web site. Institutes must provide only the lists of new, dropped or reinstated members using the required Member Reporting Template. Membership administrator will get a confirmation that members have been entered, and they can get their assigned membership numbers and passwords by accessing on-line the members file; see instruction below. These should be recorded in the local membership database. Membership Administrator should provide with the membership number and password when a member request this information and should not ask their members to e-mail IIA Global directly to obtain these.

Designation

IIA-Institutes should report their designated Membership Administrator to IIA Global by submitting their Institutes' Officers Listing Form. By supplying copy of the officers listing, institutes state that their membership administrator has reviewed and agree with the IIA's Database Privacy Guidelines and The IIA Privacy Policy included in the form. The IIA asks that only a couple representatives from each institute have access to the member data online to keep our members' information as private as possible.

Requirements

Institute Membership Administrator and Web site Administrator:

- Must be a member of the IIA-Institute and have a membership ID number and a password (it should not contain symbols or characters *, ñ, é, #, etc). Membership Administrator WITHOUT an ID number and Password needs a membership number and a password to access the restricted pages of the Web page. If the designated membership administrator is not a member, institute must add this individual to their membership by using the required template used for membership reporting and sending the listing to institutes@theiia.org.
- Must review, and agree with The IIA Privacy Policy and Database Privacy Guidelines, and Letter of Agreement included in the Officers Listing Form. Membership Administrators are informed by their institute contacts of the privacy policy and the Letter of Agreement must be e-mail to institutes@theiia.org. The Membership Administrator must review and agree with the Institute The IIA Privacy Policy and Database Privacy Guidelines before access to member download is granted

Membership Reporting

All new, dropped and reinstated members must be reported monthly or quarterly depending on the institute selection of delivery of basic member benefits. The Membership reporting frequency depends on the institute's selection of Delivery of Basic Member Benefits.

- **Direct Delivery (Must report monthly) -** If the institute selected "direct delivery," monthly reporting is required and all new members will receive a New Member Welcome Letter Sample (Spanish/French) directly from IIA Global. Members will receive their assigned passwords to access the "members-only" pages on the IIA Web site. The Membership Administrator will receive a confirmation that members have been entered.
- **Indirect Delivery (Must report at least quarterly) -**If the institute selected "indirect delivery," quarterly (February, May, August, November) reporting is required and the institute must provide their members with their membership ID number and passwords. Institutes can use and mail merge the New Member Welcome Letter Sample (Spanish/French) and Membership Certificate Sample (legal size), Certificate Sample (A4) or Certificate Sample (8-5x11) to send this directly to their members. The Membership Administrator will receive a confirmation that members have been entered and they can get their assigned membership numbers and passwords by accessing on-line the members file; see instruction below. These should be recorded in the local membership database.

Membership Reporting Template

A new redesigned and required membership reporting template that will allow IIA Global to automate the creation of new records and will help expedite the process will be posted soon on this page very soon. For now, please keep using the following: Member Reporting Template.

Avoid delay in processing membership:

- Always use the required Member Reporting Template and send the required information only.
- Write Institute name and number in the Excel sheet.
- Report New and dropped members periodically and as soon as they are recruited or dropped.
- Do not send member addresses.
- Do not send entire membership listing for IIA Global to reconcile.
- Do not send hard copies of membership registrations.
- Do not send individual payment of membership

- Membership Administrator should be familiar with the instructions to download membership numbers and passwords.
- E-mail the template to institutes@theiia.org. Do not send e-mail to incorrect inbox or to multiple people to avoid duplicate e-mails. Do not use accents, characters or symbols.
- Change to Direct Delivery if institute wishes IIA Global to send membership number and password directly to institute members. Refer to the institute's copy of the selected Optional Institute/Member Benefit/Services.

Where to send the membership listing?

The members' listings should be e-mailed to the Institute's mailbox (institutes@theiia.org). By sending it to the incorrect location or to multiple people, it makes Member Services to filter through duplicate e-mails, which is very time consuming and as a result it may delay the processing time.

Membership Report Processing Time

Normally it will take two week average and reports are processed in the order they are received.

Transfer of Membership

IIA members who wish to transfer their membership to another institute should contact their local institute and report the change to IIA Global Membership (The member should be reported as dropped from one institute and new to the other institute). Refer to www.theiia.org/chapters/index.cfm?act=all.list for a list of all IIA Institutes.

Join Date

The date joined on the IIA Global Headquarters' database will be the date member records are keyed into the system. To match this with institutes' records, they will need to adjust their membership list manually. If record shows "null" on the joined date field it means that the membership administrator is running the listing to soon. It takes approximately one week for the system to assigning a join date to the members that have just been entered.

Institutes with no Membership Changes to Report

If an institute has no changes to report in a particular quarter, a confirmation needs to be sent to IIA Global for compliance purpose at the end of that particular quarter. If no confirmation is received it will appear as a missing report.

Members Profile

Institute members can make changes directly to their profile by following these instructions: Member Profile Instructions

Information members can change directly on their profile:

- Nickname
- E-mail Address
- Job Title
- Job Code
- Primary industry code

- Secondary industry code
- Preferred communication method
- Contact preference
- Password
- Organization name (Look at the end of your profile information and click to change your organization name. This information will not be automatically updated - a form will be provided for you to complete and an e-mail will be sent to Customer Relations to make the change)

New Members Registering for Certification Candidates

Accurate and timely membership reporting is very important and with the introduction of Computer Based Testing (CBT) for IIA Certifications members will need their global membership numbers before signing up for an exam in order to benefit from member prices. To avoid the creation of a duplicate record, there must be a match on the membership/customer number, first and last name, and e-mail address. If the candidate is an IIA member and the Certification Candidate Management System (CCMS) provides them with an IIA candidate ID number that is different from their IIA global membership ID number, IIA Global should be informed immediately and NO application or registration forms should be submitted until they are notified that their records have been merged

Each individual (member, candidate, or both) should have only ONE UNIQUE ID with IIA HQ, no matter which IIA Global system is being used. To avoid duplicate records do the following

Institute with Certification Agreement

Institutes need to wait to receive an ID number from IIA Global Certification before sending the same person as a member to IIA HQ Membership, or vice versa. If an agreement institute sends a new candidate to IIA Global Certification area and also sends the same individual to the Membership area as a new member at the same time, the individual will be assigned two different ID numbers in error.

Institute with No Certification Agreement

Institutes should ask each new member if they have already created a record in CCMS. If so, the institute should supply that ID number in the “Global ID Number” field when submitting the new member to IIA HQ.

If the new member has not already created a record in CCMS but is planning to pursue certification, the institute should ask the new member to wait on creating a record in CCMS until the institute can send the membership information to IIA HQ and receive a “Global ID Number” and password. Once the institute supplies this to the new member, they can use it under the “First Time Users” section in CCMS to transfer their IIA Global record into CCMS. The new member’s Global ID number should be used as the “User Name”, their password from IIA Global HQ will be their password on this screen, and they will need to input the same e-mail address that the institute supplied for them in the template. (Automated communications to the candidate from CCMS will be sent to this e-mail address. If a candidate signs up in the CCMS while awaiting a Global IIA member ID from the institute and IIA HQ, the candidate will be assigned two different ID numbers in error (one through Membership and one through CCMS). Since the membership and the candidate information are not on the same record, the candidate will not receive member pricing on the exam. The candidate must input their name and e-mail address exactly the way it is currently recorded in the global IIA database. Any differences in spelling or variations in the order of their name or e-mail address will result in the creation of a duplicate record. Candidates are encouraged to review their information in the membership database before creating a profile in CCMS.

Also, I checked the formatting that we require for our candidate demographic files from the institutes with agreements. We use a country code (number) rather than a country name, so we do not have to mention the “all caps” for country names. We do not specify anything about capitalization or special characters for names or e-mail addresses, but we list them a little differently. For details on CCMS click Certifications.

Templates, Welcome Letter Samples and Certificates:

Required Membership Template

The Member Reporting Template is designed to use a program that automatically uploads membership reports into the global database. The program will only work if only the necessary information required is included in this template EXACTLY as specified in the instructions. Do not add any other information not required by the template. Use this template to report new and dropped members: Member Reporting Template. Send listing to institutes@theiia.org.

New Member Welcome Letter

Institute that has selected direct delivery of Basic Member Benefits, institute members will receive directly from IIA Global a New Member Welcome Letter with their membership number and password as soon as they are entered. Refer to the institute copy of the selected Optional Institute/Member Benefit/Services. Click for a New Member Welcome Letter Sample (Spanish/French).

Membership Certificate

IIA Global Headquarters no longer sends membership certificates via postal mail for new members where these were provided previously. A sample of The IIA New Member Certificate is available on the Web that institutes can create and distribute to their members. Click for a Membership Certificate Sample (legal size), Certificate Sample (A4) or Certificate Sample (8-5x11)

Membership Download Process

The Membership Download must be done by the membership administrator previously authorized by the institute. The download can be performed 24 hours a day, 7 days a week. Administrators should provide ID numbers and password to their members and should not encourage members to contact IIA Global to provide this information.

Instructions

Click the following for instructions to download the membership database:

- Instructions to Download Member Data File
- Instructions to Download Member Data File (with Screen Shots)

Information Included on the Members' Data File download?

The download contains the IIA Global assigned member number and password that should be forwarded to new members as they are processed. These passwords remain active until institutes instruct the IIA Global Headquarters to drop a member from our lists. The listing also includes the members IIA designations. We recommend that any member changes be reported at least on a monthly basis to facilitate member record reconciliation.

ID	First Name	Last Name	Date Joined	Date Rejoined	Drop Date	Mbr Status	PrefEmail	Web Password

1111111	John	Smith	1/31/2000			Active	john.smith@email.com	ABCDE123
2222222	Mary	Doe	1/31/2009			Active	mary.doe@email.com	FGHI4567

The Membership Management Tool (MMT)

The MMT is an Access Database Program (Microsoft Access) and a standalone application that is not linked to the IIA Database, but reports can be reproduced for institutes use. The IIA's Membership Management Tool (MMT) provides the tools necessary to process member data for mailings, emails, CPE reporting, event management and more. Users must have the Membership Management Tool (MMT) Software installed on their PC (available on CD only - cannot be downloaded from the Web). The CDs (one with the software and the other with the tutorial) are available upon request to institutes@theiia.org.

Membership Administrators are required to review the Privacy Guidelines and submit the letter of agreement. Contact Institute Relations for details. The IIA asks that only a couple representatives from each institute have access to the member data on-line. This is to keep our members' information as private as possible. The MMT will allow institutes leaders to:

- Track contact information for communication purposes.
- Run profile reports, labels, name badges
- Organize meeting attendance
- Track local CPE credits.
- Conduct membership analysis

Please refer to The IIA Membership Management Tool (MMT) Manual.

For questions please e-mail institutes@theiia.org.