TCS™-Elections, Boards, and Commissions Tracking System - *EBCTS*©

User Manual (12-29-2010)

Background

The EBCTS application tracks the elected and appointed officials in your municipality. The following area can be tracked:

- Available people in the community who are interested and/or currently serving in elected or appointed positions
- Ethics training (Massachusetts)
- Campaign finances (Massachusetts)
- Conflict of interest training (Massachusetts)
- Open meeting law training (Massachusetts)
- Positions and terms of municipal commissions and boards

EBCTS follows the same general format as all IMAS desktop applications. There is a main menu and buttons to each module and a report menu. Within each module there are buttons to add, delete, search, and close. Some modules also contain (depending on the license purchased) the SPV functionality to scan a paper image to a PDF.

Main Menu

IMAS will install the application on your server and/or computers. A shortcut icon will be available. When opened, the application will prompt for a username and password and then will default to a main menu as follows:

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People

The People module tracks the basic contact information about people in your municipality and what commissions and boards they are interested in serving on.

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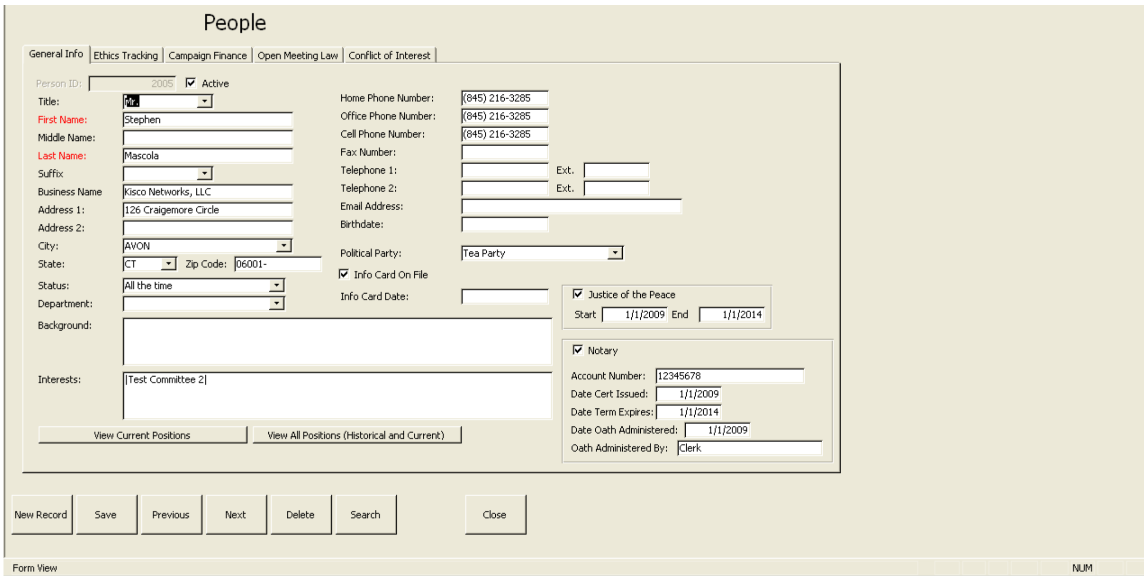
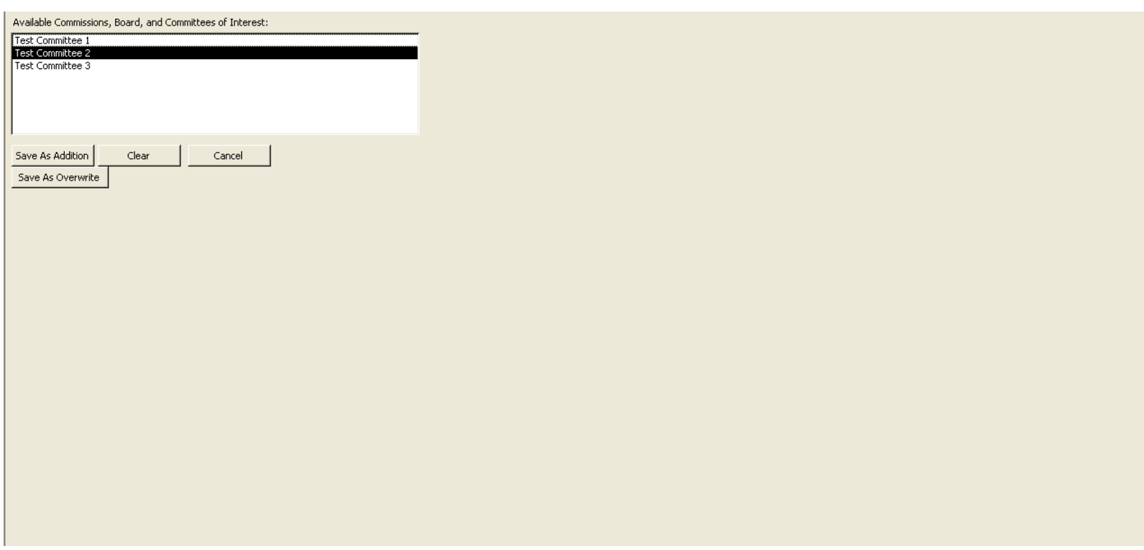


From this module, you track if the person is a notary or justice of the peace and you can see what positions they currently hold and what positions they have held in the past.

Double-click on the "Interests" text box and you will be able to select the commissions the person is interested in working on:



Only "Active" people can be added to a term.

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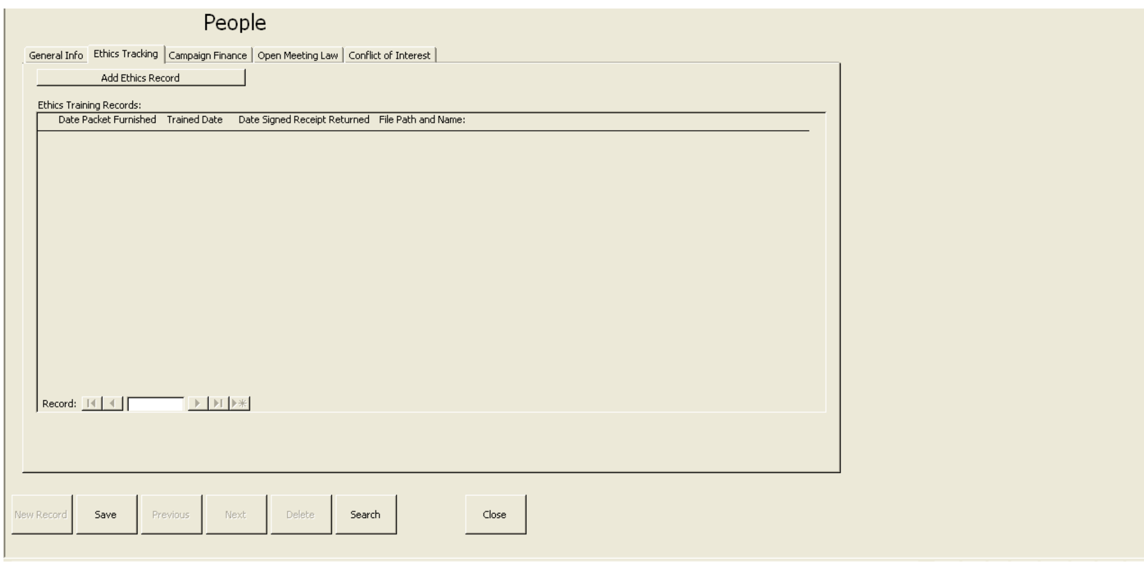
Depending on what modules you have paid for, across the top are extended modules to track the following:

Ethics
Campaign Finance
Open Meeting Law
Conflict of Interest

Ethics



For each person, you can add an unlimited amount of Ethics training records. Click the “Add Ethics Record” button to add a record.

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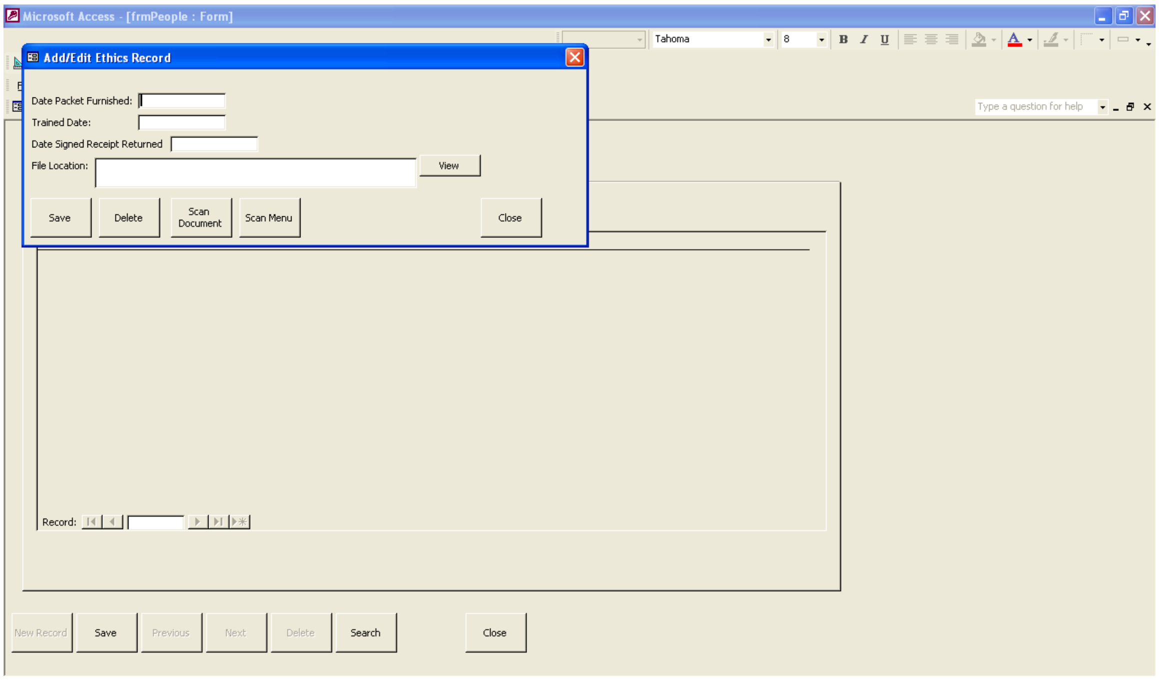

From this entry screen, you can also capture and view a single page scan of the signed Ethics training certification.

Campaign Finance

For each person, you can track the funds and spending from their yearly election campaigns. Click the "Add Campaign Finance Record" button to add a record.

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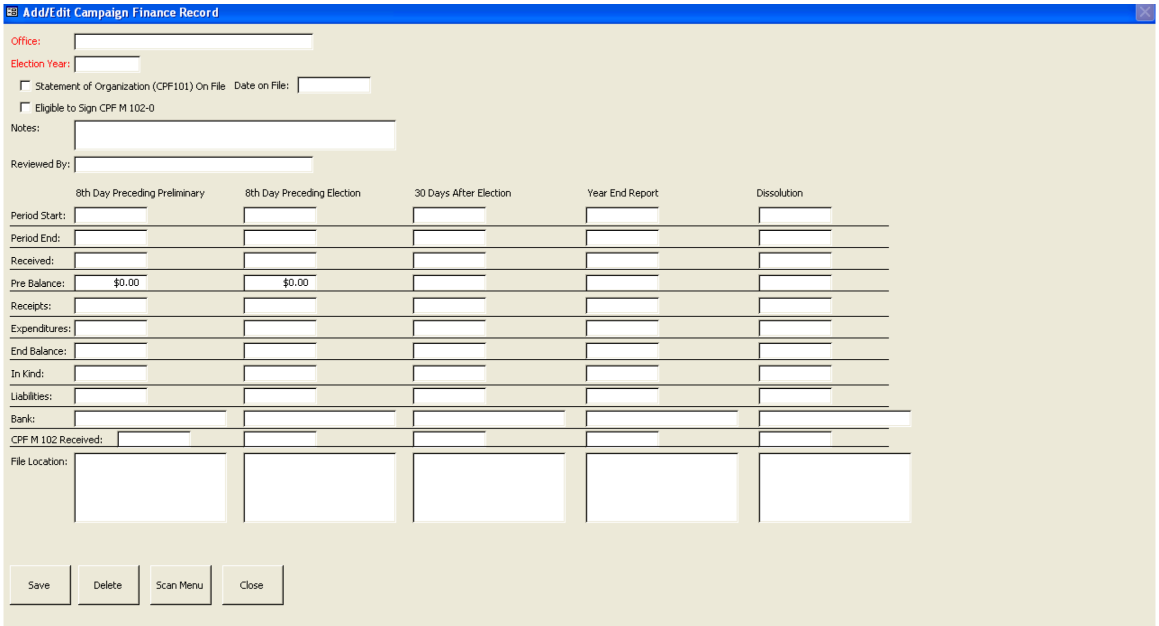

From this entry screen, you can also capture and view a single page scan of each piece of the campaign (8th Day Preceding Preliminary, 8th Day Preceding Election, 30 Days After Election, Year End Election, Dissolution)

Open Meeting Law

For each person, you can track their open meeting law training Click the “Add Open Meeting Law Record” button to add a record.

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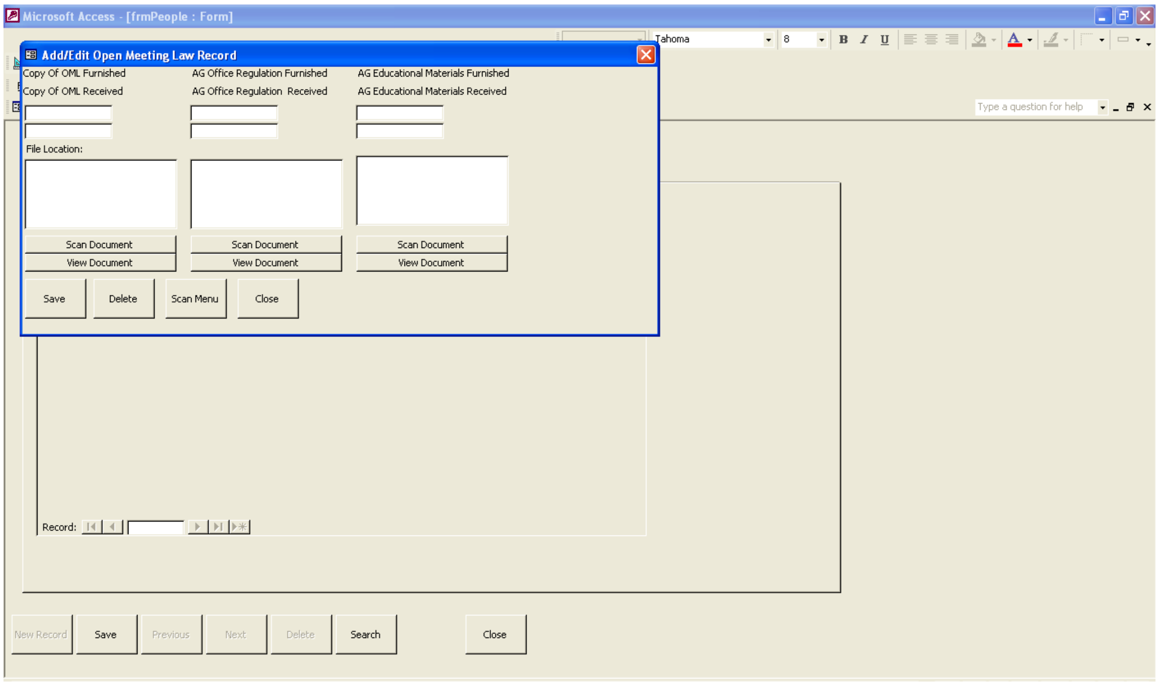

From this entry screen, you can also capture and view a single page scan of each piece of the OML(OML Furnished/Received, Attorney General Office Regulation Furnished/Received, Attorney General Education Materials Furnished/Received)

Conflict of Interest

For each person, you can track their conflict of interest training Click the "Add Campaign Finance Record" button to add a record.

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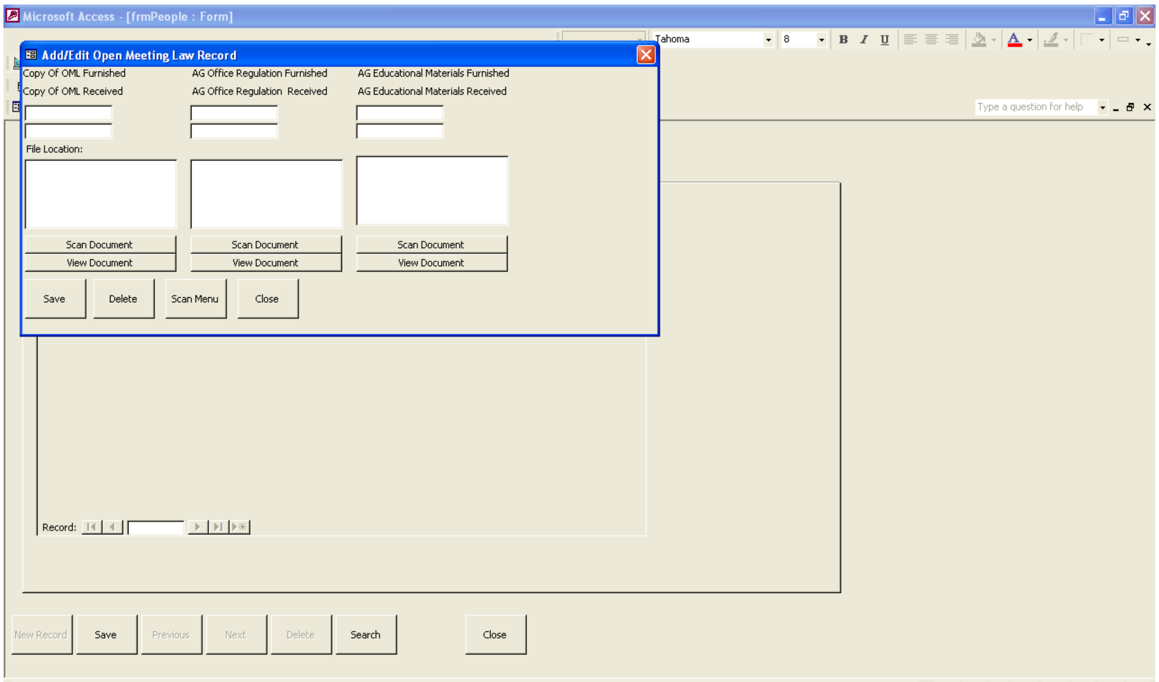

From this entry screen, you can also capture and view a single page scan of each piece of the COI (Conflict of Interest Packet Furnished/Received, Online Training Furnished/Received, Certification Furnished/Received).

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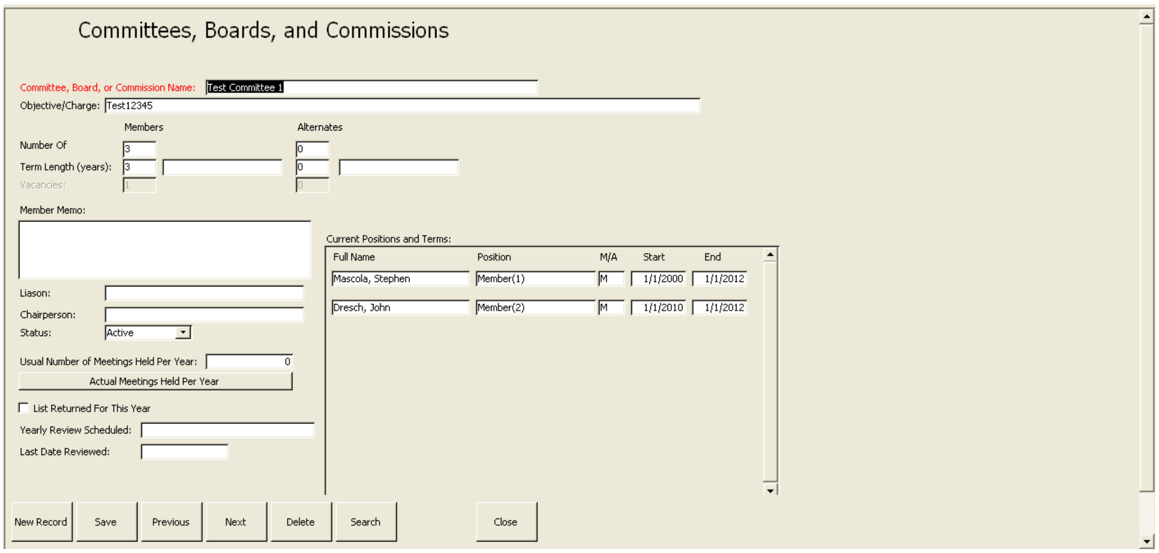
Commission

The commissions module is where the user can load all of the available commissions, committees, and boards in their municipality.



For each commission or board, the user can track basic data about the number of members and alternates. The system will automatically calculate the vacancies by subtracting the number of members and alternates less the members and alternates which have active positions and terms. *(see Positions and Terms sections for more information)*

The subform "Current Positions and Terms" shows all positions and their members/alternates currently being held in a term.

Click the "Actual Meetings Held Per Year" to enter the number of meeting held in fiscal or calendar year for this commission or board.

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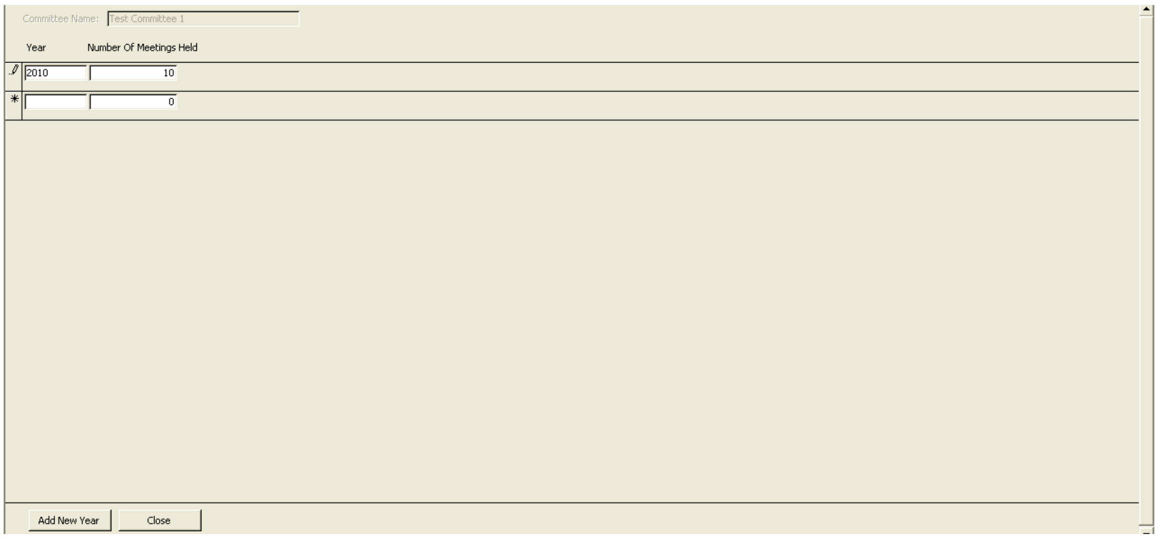

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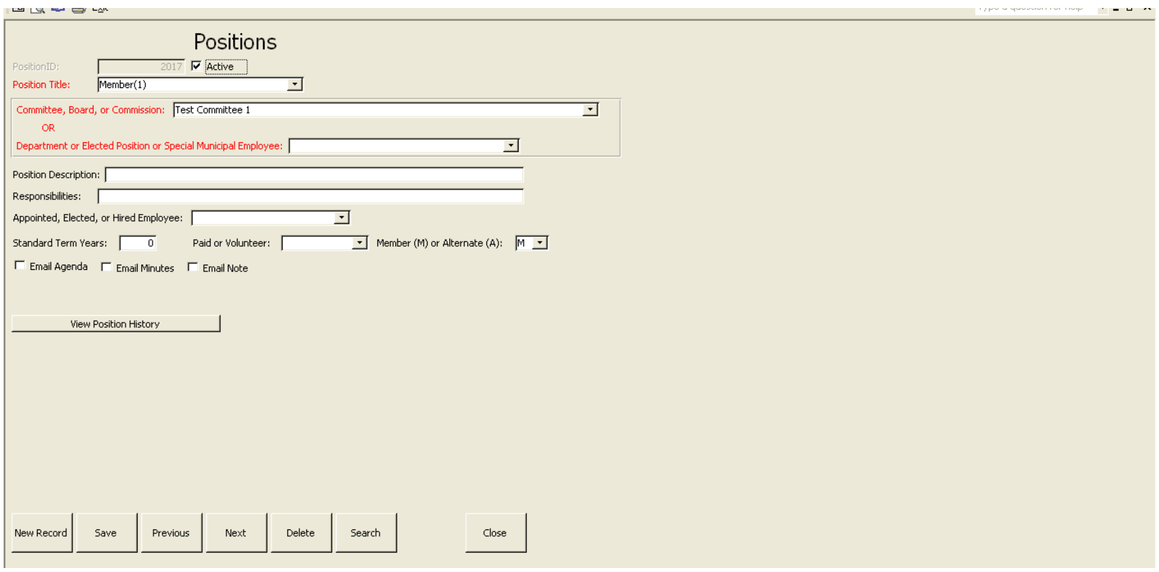
Positions

Once the commissions and boards are entered, you can enter available positions.



The user can create and track positions for each commission or board in the municipality. Each position must be for a committee, board, or commission OR it can be a position in a department or elected official.

Only "Active" positions can be added to a term.

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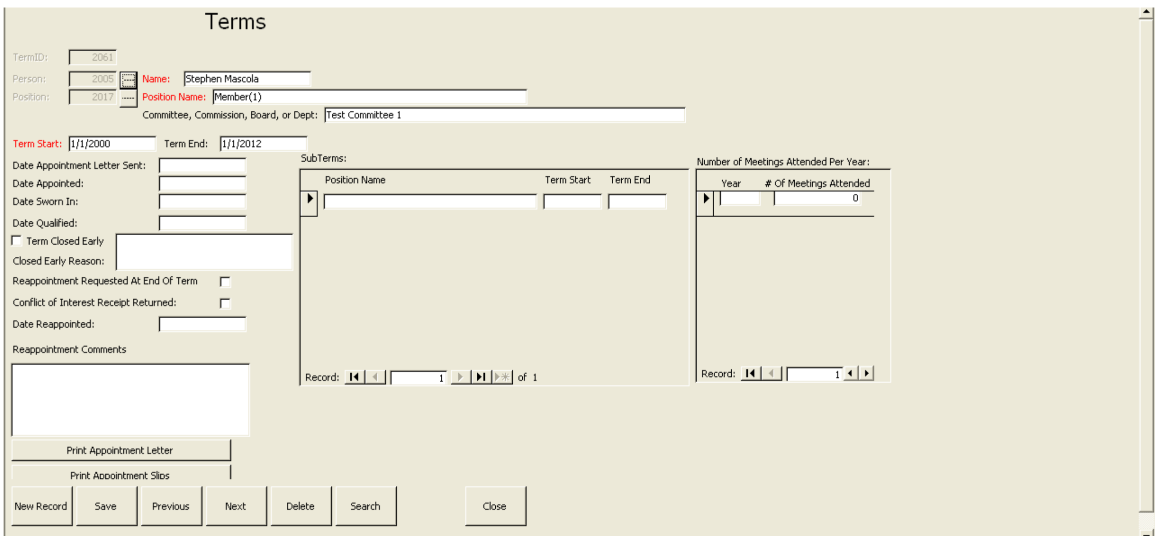
Terms

The term module is where the parts all come together. A term tracks an active person's election or appointment to an active position on a commission, board, or committee.



To add a term, click on the "New Record" button. In order to complete a term, an active person and position are required. To add an active person, click the "…" button labeled "Name". This will open a search form to search for available people.

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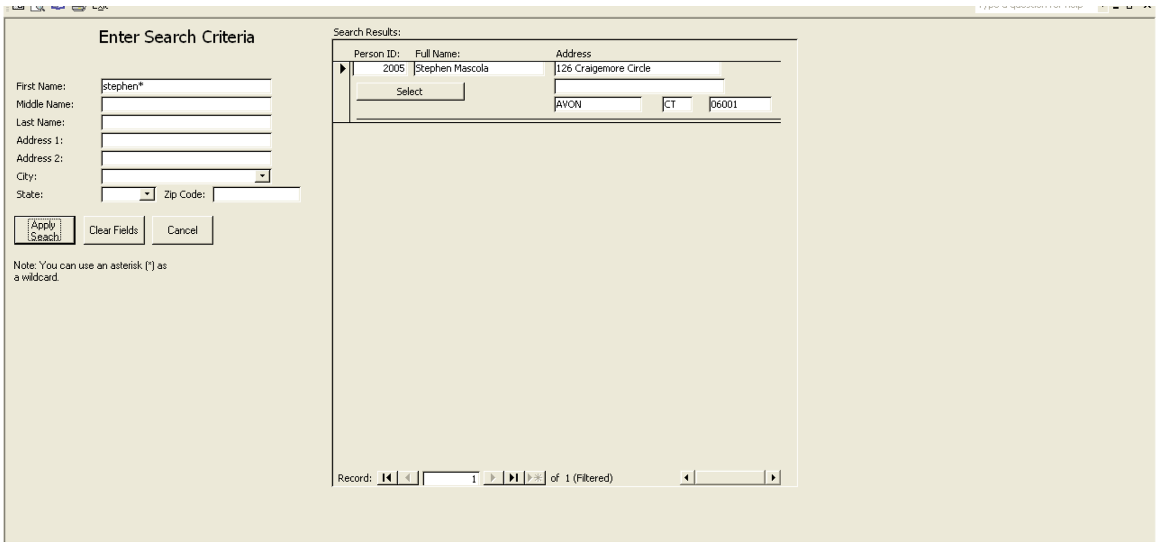
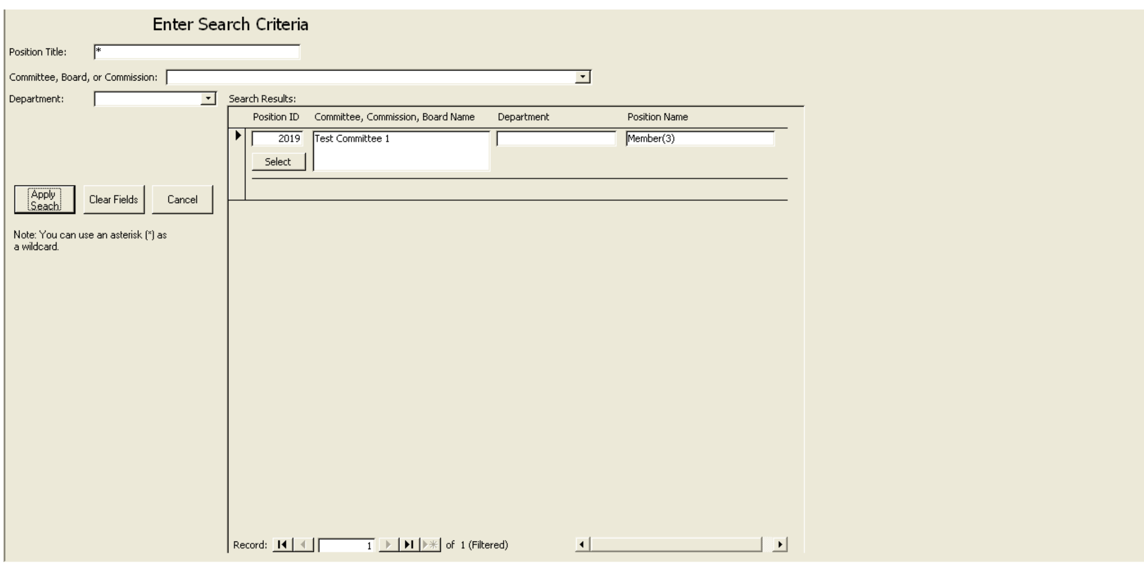


Click “Select” to pick the person.

To add an active position, click the “…” button labeled “Position Name”. This will open a search form to search for available positions.



Click “Select” to pick the position.

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Enter the term start and end dates along with any other pertinent information. In this entry form, you can also add the number of meetings held per fiscal or calendar year which can be reported on against the number of meetings held by the committee.

In addition, from this screen, you can print an appointment letter and slip, which can be customized for your municipality by IMAS.

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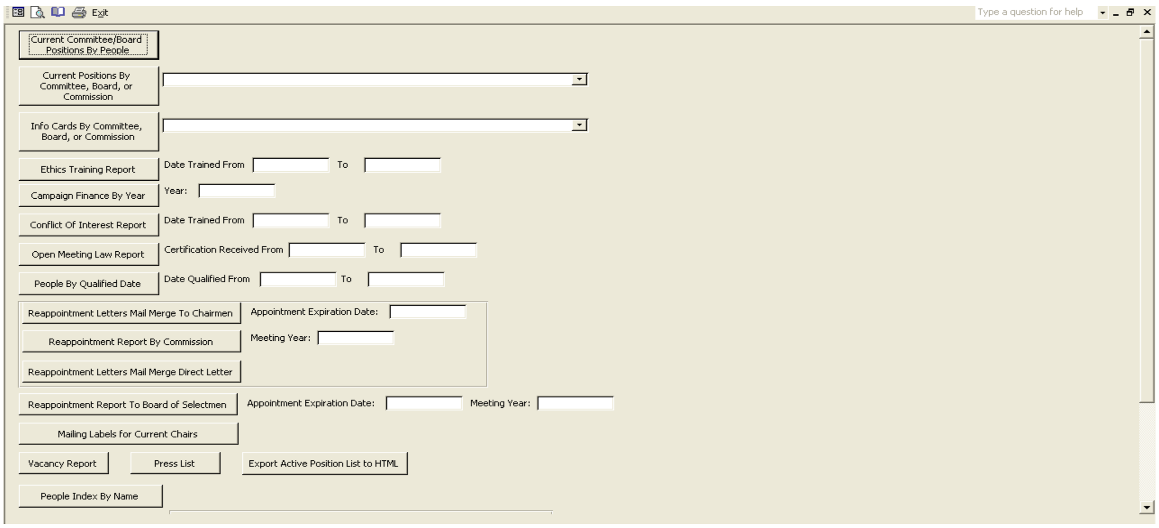
Reports

The EBCTS application comes with a host of pre-built reports for each module.



Each report has a button and some have additional criteria such as start and end dates or committee names. If you require a report that is not available, please contact IMAS and one can be designed for your needs.

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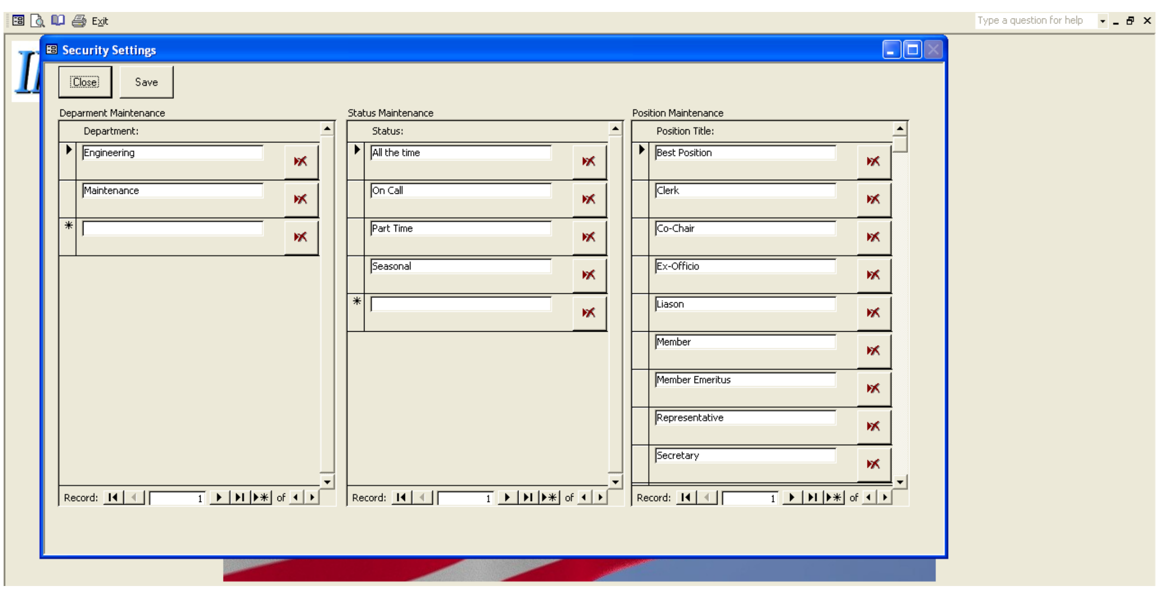
Administration

From the "Settings" button off of the main menu, there are user controlled settings for user settings



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From here, an administrative user can enter default departments, statuses, and position names which will populate the respective drop-down lists within the application.

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