



TCSTTM-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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People

General Info | Ethics Tracking | Campaign Finance | Open Meeting Law | Conflict of Interest

Person ID: [2009] Active

Title: [Mr.]

Home Phone Number: [(845) 216-3285]

Office Phone Number: [(845) 216-3285]

Call Phone Number: [(845) 216-3285]

Fax Number: []

Telephone 1: [] Ext. []

Telephone 2: [] Ext. []

Email Address: []

Birthdate: []

Political Party: [Tea Party]

Info Card On File

Info Card Date: []

Justice of the Peace

Start: [1/1/2009] End: [1/1/2014]

Notary

Account Number: [12345678]

Date Cert Issued: [1/1/2009]

Date Term Expires: [1/1/2014]

Date Oath Administered: [1/1/2009]

Oath Administered By: [Clerk]

Interests: [Test Committee 2]

View Current Positions | View All Positions (Historical and Current)

New Record | Save | Previous | Next | Delete | Search | Close

Form View NLM

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:

Available Commissions, Board, and Committees of Interest:

Test Committee 1
Test Committee 2
Test Committee 3

Save As Addition | Clear | Cancel

Save As Overwrite

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

The screenshot shows a web application interface for the 'People' module. At the top, there are tabs for 'General Info', 'Ethics Tracking', 'Campaign Finance', 'Open Meeting Law', and 'Conflict of Interest'. Below the tabs is a button labeled 'Add Ethics Record'. The main area is titled 'Ethics Training Records:' and contains a table with the following headers: 'Date Packet Furnished', 'Trained Date', 'Date Signed Receipt Returned', and 'File Path and Name:'. The table is currently empty. Below the table is a record navigation control with the text 'Record:' followed by navigation icons (back, forward, search, etc.). At the bottom of the interface are buttons for 'New Record', 'Save', 'Previous', 'Next', 'Delete', 'Search', and 'Close'.

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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A screenshot of a Microsoft Access application window titled "Microsoft Access - [frmPeople : Form]". The window displays a form titled "Add/Edit Ethics Record". The form has a light beige background and a blue title bar. It contains several text boxes for data entry: "Date Packet Furnished:", "Trained Date:", "Date Signed Receipt Returned:", and "File Location:". Below the "File Location" box is a "View" button. At the bottom of the form are buttons for "Save", "Delete", "Scan Document", "Scan Menu", and "Close". A "Record:" label is positioned above a set of navigation arrows. At the very bottom of the window, there is a row of buttons: "New Record", "Save", "Previous", "Next", "Delete", "Search", and "Close". The window also shows a standard Windows toolbar with various icons and a search box.

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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Add/Edit Campaign Finance Record

Office:

Election Year:

Statement of Organization (CPF101) On File Date on File:

Eligible to Sign CPF M 102-0

Notes:

Reviewed By:

	8th Day Preceding Preliminary	8th Day Preceding Election	30 Days After Election	Year End Report	Dissolution
Period Start:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Period End:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Received:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Pre Balance:	\$0.00	\$0.00	<input type="text"/>	<input type="text"/>	<input type="text"/>
Receipts:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Expenditures:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
End Balance:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
In Kind:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Liabilities:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Bank:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
CPF M 102 Received:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
File Location:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

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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A screenshot of a Microsoft Access application window titled "Microsoft Access - [frmPeople : Form]". The main window displays a form titled "Add/Edit Open Meeting Law Record". The form is divided into three columns for tracking: "Copy Of OML Furnished", "AG Office Regulation Furnished", and "AG Educational Materials Furnished". Each column has a "Furnished" and "Received" section, each with a text input field. Below these are three "File Location:" labels, each followed by a large empty text area. Under each "File Location" area are two buttons: "Scan Document" and "View Document". At the bottom of the form are buttons for "Save", "Delete", "Scan Menu", and "Close". A "Record:" label with navigation arrows is visible at the bottom left of the form area. The background window shows a standard Microsoft Access interface with a menu bar and a toolbar.

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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The screenshot shows a Microsoft Access window titled "Microsoft Access - [frmPeople : Form]". The main window displays a form titled "Add/Edit Open Meeting Law Record". The form is divided into three columns for tracking:

Copy Of OML Furnished	AG Office Regulation Furnished	AG Educational Materials Furnished
<input type="text"/>	<input type="text"/>	<input type="text"/>
Copy Of OML Received	AG Office Regulation Received	AG Educational Materials Received
<input type="text"/>	<input type="text"/>	<input type="text"/>
File Location:		
<input type="text"/>	<input type="text"/>	<input type="text"/>
Scan Document	Scan Document	Scan Document
View Document	View Document	View Document
Save	Delete	Scan Menu
Close		

At the bottom of the form, there is a "Record:" field with navigation buttons (back, forward, search) and a "Close" button. The background window shows a toolbar with various icons and a search bar.

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.

Committees, Boards, and Commissions

Committee, Board, or Commission Name:

Objective/Charge:

Members: Alternates:

Number Of:

Term Length (years):

Vacancies:

Member Memo:

Liason:

Chairperson:

Status:

Usual Number of Meetings Held Per Year:

Actual Meetings Held Per Year:

List Returned For This Year

Yearly Review Scheduled:

Last Date Reviewed:

Current Positions and Terms:

Full Name	Position	M/A	Start	End
Mascola, Stephen	Member(1)	M	1/1/2000	1/1/2012
Dresch, John	Member(2)	M	1/1/2010	1/1/2012

New Record Save Previous Next Delete Search Close

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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Committee Name:

Year	Number Of Meetings Held
2010	10
*	0



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Positions

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

The screenshot shows a web-based form titled "Positions". At the top, there is a "Position ID:" field with the value "2017" and a checked "Active" checkbox. Below this is the "Position Title:" field with "Member(1)" selected in a dropdown menu. The next section is for "Committee, Board, or Commission:" with "Test Committee 1" selected, followed by an "OR" and a "Department or Elected Position or Special Municipal Employee:" dropdown. The form continues with "Position Description:" and "Responsibilities:" text areas, "Appointed, Elected, or Hired Employee:" dropdown, "Standard Term Years:" (0), "Paid or Volunteer:" dropdown, and "Member (M) or Alternate (A):" (M). There are three checkboxes: "Email Agenda", "Email Minutes", and "Email Note". A "View Position History" button is located below the checkboxes. At the bottom of the form, there are buttons for "New Record", "Save", "Previous", "Next", "Delete", "Search", and "Close".

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.

Terms

TermID: 2061
Person: 2005 Name: Stephen Mascola
Position: 2017 Position Name: Member(1)
Committee, Commission, Board, or Dept: Test Committee 1

Term Start: 1/1/2000 Term End: 1/1/2012

Date Appointment Letter Sent: _____
Date Appointed: _____
Date Sworn In: _____
Date Qualified: _____
 Term Closed Early
Closed Early Reason: _____
Reappointment Requested At End Of Term
Conflict of Interest Receipt Returned:
Date Reappointed: _____
Reappointment Comments: _____

SubTerms:		
Position Name	Term Start	Term End

Number of Meetings Attended Per Year:	
Year	# Of Meetings Attended
	0

Record: 1 of 1

Print Appointment Letter
Print Appointment Slips

New Record Save Previous Next Delete Search Close

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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Enter Search Criteria

First Name:
Middle Name:
Last Name:
Address 1:
Address 2:
City:
State:
Zip Code:

Note: You can use an asterisk (*) as a wildcard.

Search Results:

Person ID:	Full Name:	Address:
2005	Stephen Mascola	126 Craigmere Circle
<input type="button" value="Select"/>		
	AVON	CT 06001

Record: 14 of 1 (Filtered)

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.

Enter Search Criteria

Position Title:
Committee, Board, or Commission:
Department:

Note: You can use an asterisk (*) as a wildcard.

Search Results:

Position ID	Committee, Commission, Board Name	Department	Position Name
2019	Test Committee 1		Member(3)
<input type="button" value="Select"/>			

Record: 14 of 1 (Filtered)

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.

The screenshot shows a web application window with a title bar containing "Type a question for help" and standard window controls. The main content area is a light beige background with a list of report options, each with a button and some with additional input fields:

- Current Committee/Board Positions By People
- Current Positions By Committee, Board, or Commission
- Info Cards By Committee, Board, or Commission
- Ethics Training Report: Date Trained From [] To []
- Campaign Finance By Year: Year: []
- Conflict Of Interest Report: Date Trained From [] To []
- Open Meeting Law Report: Certification Received From [] To []
- People By Qualified Date: Date Qualified From [] To []
- Reappointment Letters Mail Merge To Chairmen: Appointment Expiration Date: []
- Reappointment Report By Commission: Meeting Year: []
- Reappointment Letters Mail Merge Direct Letter
- Reappointment Report To Board of Selectmen: Appointment Expiration Date: [] Meeting Year: []
- Mailing Labels for Current Chairs
- Vacancy Report
- Press List
- Export Active Position List to HTML
- People Index By Name

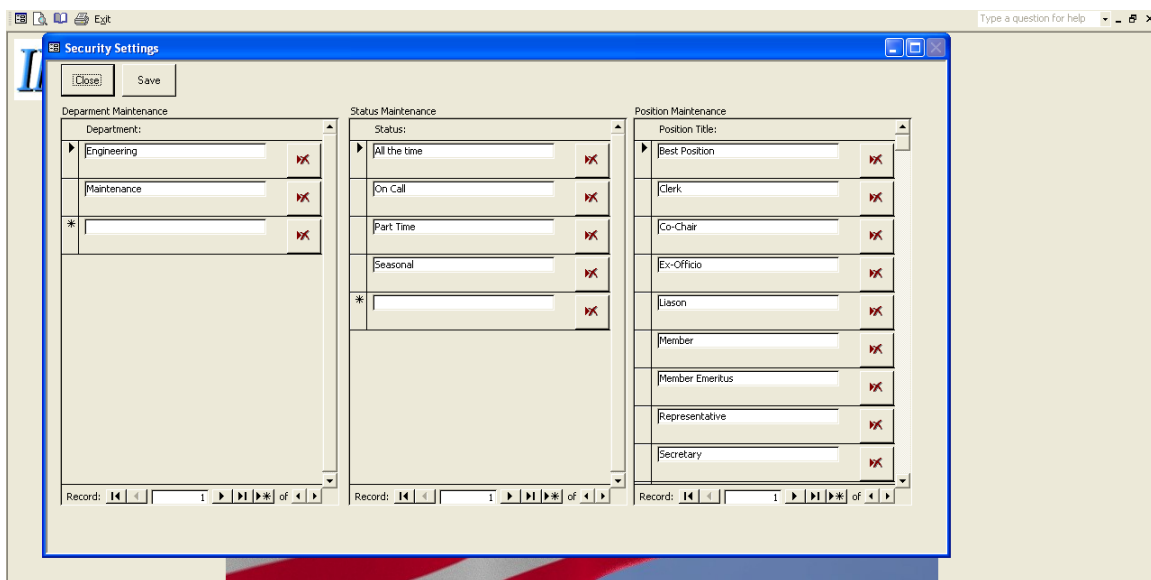
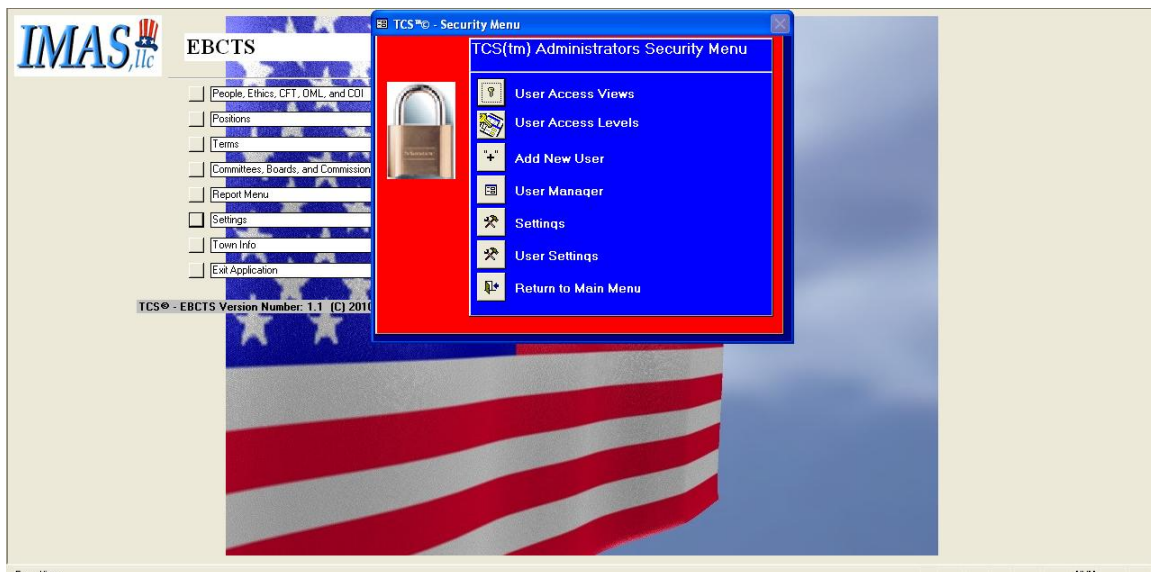
Each report has a button and some have additional criteria such as start and end dates or committee names. If you require a report that is not available, please contact IMAS and one can be designed for your needs.



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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.