



IMA web portal frequently asked questions

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Q. Can I login to the portal with my Members' Zone login details?

Your new web portal login is separate from your existing login to the Members' Zone on the IMA website. Your Members' Zone login details will not allow you access to the new web portal.

Q. I've forgotten my password or I haven't received new web portal login details – how do I reset my password?

If you are having issues logging in, please use the forgotten username / password tools to reset your password, underneath the "sign in" button on the login page. If this does not work for you, please email office@i-m-a.org.uk

Q. How do I change a postal address on my invoice?

On your profile page, you can select the necessary address to appear on your invoice by going to the 'Addresses' section of your profile, selecting the pencil icon next to the address you want to appear on your invoice, and selecting 'preferred billing address'. You can also add a new address by clicking the + icon and following the same steps.

Now you can go and find the invoice on the 'Activity' tab, select the invoice and click the 'print' tab and this will reload your invoice with the correct information.

Q. What do I do if I need a purchase order (PO) number on my invoice?

This process will depend on whether it's an invoice for membership fees or for an event (such as a training course or conference).

For membership fees, please ensure that you add the PO number into the 'Purchase Order Number for Billing' box, which can be found by clicking the pencil icon on your

personal details section within the About me tab of your profile. If you are doing this after the invoice has been generated, you will need to re-load the invoice by accessing it from the activity tab and selecting the 'print' tab to generate a new PDF copy.

For an event, you will need to add the PO number to the relevant box when completing your booking.

Q. Will I receive all my invoices by email?

Yes, invoices for member fees and events will be sent to your primary email address (the email address within your Personal Details section of the About me tab) as a PDF email attachment.

The only exception is if you're employed by an organisation with a discount for central invoicing (organisational affiliation), in which case a single invoice for your membership fees will be emailed to your employer rather than you.

Unless you are employed by an organisation with an organisational affiliation, your membership fees invoice will now be emailed to you, even if in the past it has gone directly to your employer. You will need to forward it to the appropriate person in your organisation to arrange payment. The postal address which appears on the invoice can be specified as needed by amending your billing preference within your online account.

Q. How can I cancel a training/event booking?

You can cancel a booking by finding the relevant booking within the activity tab. Click to view the registration and then select cancel registration. You will then need to proceed through the checkout process.

NB: all bookings are subject to the terms & conditions agreed to at the time of purchase, meaning that there may be a cancellation charge you are liable to pay,

depending on when you are making the cancellation. Training Bookings T&Cs can be found [here](#).

If you have already paid for the event, please contact us at training@i-m-a.org.uk as only a staff member can cancel your booking after this point.

Q. Why isn't an invoice appearing in my account?

During the initial transition period to this new system, some members and customers will have open invoices generated by our previous systems. These legacy invoices won't appear in the new portal – if you require a copy of one of these earlier invoices, please contact us at office@i-m-a.org.uk

Please also note that if you're employed by an organisation with a discount for central invoicing (organisational affiliation) a single invoice for membership fees will be emailed to your employer, and this won't be visible in your portal account.

Q. Do I need to submit IMA training/webinars/conference attendance for my CPD record

No, you do not need to submit a CPD activity for your attendance at IMA Training and other events. Once the event has passed and you have been marked as attending by a member of the IMA Team, points will automatically be added to the relevant CPD category (e.g. attending a training course will mean the points appear within the Training category)

NB: IMA events and training that took place before 20 July 2022 will not appear on your record. If you wish to add anything from before this date for CPD purposes, you will need to submit this as if it was a non-IMA activity.

Q. When should I submit my non-IMA CPD activities?

We would encourage members to submit CPD activities as soon after completing the activity as possible, to avoid you building up a large backlog of entries that need to

be submitted and reviewed by the IMA team. However, so long as the activity is submitted within the same CPD year for which it relates to, you can add it any point; you will just need to ensure that you select the correct date on the submission form.

[Q. I have 16 CPD points but the alert on my CPD page does not say 'CPD met', why?](#)

This is likely to be because you have not adhered to another one of the scheme rules, despite accumulating 16 points. For example, you may not have obtained points in three of the four categories, so despite having enough points, you are still not compliant. There should be some text within the alert to indicate the reason for this. However, if you have any questions or think this may be incorrect, please contact cpd@i-m-a.org.uk

[Q. Can I register other people onto training courses and other events?](#)

Yes, you can register other users onto IMA training courses and events such as Conference. There are a few important points to be aware of:

- The invoice will be registered against the account of whoever made the booking. e.g. if you book a place on a course for both yourself and a colleague, the invoice for both bookings will appear on your profile and will be emailed to you, not your colleague.
- You can only register people who work at the same organisation as you
- Although you can create a basic account for someone to register them if they do not have one, we strongly advise that they create their own account on the IMA web portal (they do not need to be a member) **before** you make the booking. You will then be able to select them from a drop-down list of users from your organisation. This will ensure event attendance is recorded properly against that individual.

[Q. Can I pay an invoice online?](#)

Invoices can currently only be paid via bank transfer or cheque according to the instructions on the invoice. We hope to introduce a facility to make payments online in the near future.

Q. What does the “BM” or “BC” mean after my membership category in the web portal?

This information is for staff and system use and relates to the type of billing associated with your record.

“BC” means you’re employed by an organisation with a discount for central invoicing (organisational affiliation), in which case a single invoice for your membership fees will be emailed to your employer rather than you.

“BM” means your organisation does not have a discount for central invoicing (organisational affiliation). Your membership fees invoice will be emailed to you, even if in the past it has gone directly to your employer, and you will need to forward it to the appropriate person in your organisation to arrange payment.