



SDMS Organizational Membership Management Guide

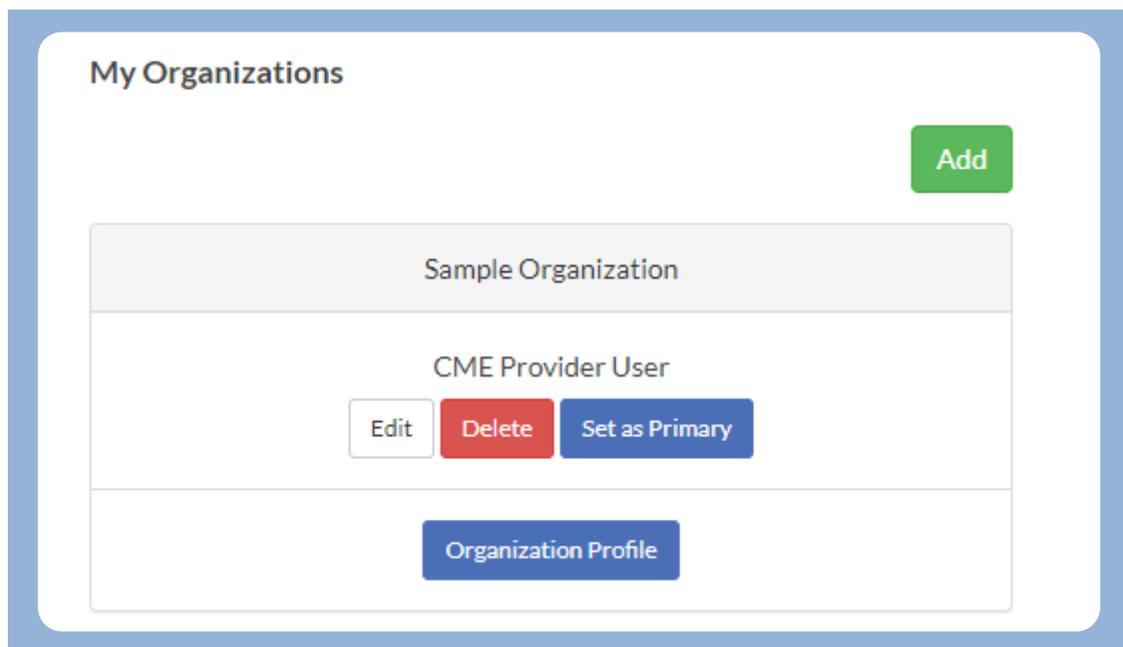


QUICK START

1. Visit sdms.org/login to login or create your FREE personal SDMS.org user account using your preferred email address. All SDMS communication will be sent to this email address.

SDMS Organizational memberships are managed through your personal SDMS.org profile.

2. In your profile, scroll down to **"My Organizations"** to **"Add"** a new organization to your profile or manage existing SDMS Organizational memberships by clicking on the **"Organization Profile"** button.



3. From your organization's profile:
 - Join as a new SDMS Organizational member
 - Renew an existing SDMS Organizational membership (within 90 days of expiration)
 - Add new beneficiaries to your current SDMS Organizational membership in the middle of a membership term

NOTE: *Beneficiaries may not be removed in the middle of a membership term for any reason, even if the employee is no longer employed by your organization. By enrolling someone as a beneficiary of your organization, you are committing to providing them with SDMS member benefits through the remainder of your SDMS Organizational membership term.*



INTRODUCTION

This guide explains the following topics:

- SDMS Organizational Membership Overview
- Navigating to Your Organization's SDMS Profile
- Understanding Your Organization's SDMS Profile
- Joining as a New SDMS Organizational Member
- Renewing an Existing SDMS Organizational Membership
- Adding New Beneficiaries in the Middle of a Membership Term

After reviewing this guide, if you have additional questions, please contact the SDMS at membershipdept@sdms.org, 1-800-229-9506, or +1 214-473-8057

TIP: Before beginning any SDMS Organizational Membership transaction, you must have at least one of the following pieces of information for each beneficiary you plan to add to your SDMS Organizational membership.

- Email address associated with their personal SDMS.org profile
- SDMS number
- ARDMS number
- CCI number

If your organization's beneficiaries do not have personal SDMS.org profiles, ask them to create their own FREE SDMS.org profile at: <https://www.sdms.org/account/create-sdms-account> before proceeding with any SDMS Organizational membership transaction.

SDMS ORGANIZATIONAL MEMBERSHIP OVERVIEW

Any organization may join the SDMS to obtain member pricing on SDMS products and services (SDMS CME application fees, etc.) and/or to provide SDMS Standard membership benefits to its staff. SDMS Standard membership benefits are highlighted at <https://www.sdms.org/membership/join-sdms/member-benefits> and are a great way for employers to boost employee retention among their sonographers.

During the SDMS Organizational member join or renew process, your organization will select an SDMS Organizational membership tier based upon your desired number of beneficiaries and level of SDMS organizational benefits. By becoming an SDMS Organizational member and buying individual SDMS memberships in bulk, your organization receives a discounted SDMS membership rate for each beneficiary as compared to buying SDMS Standard memberships individually.



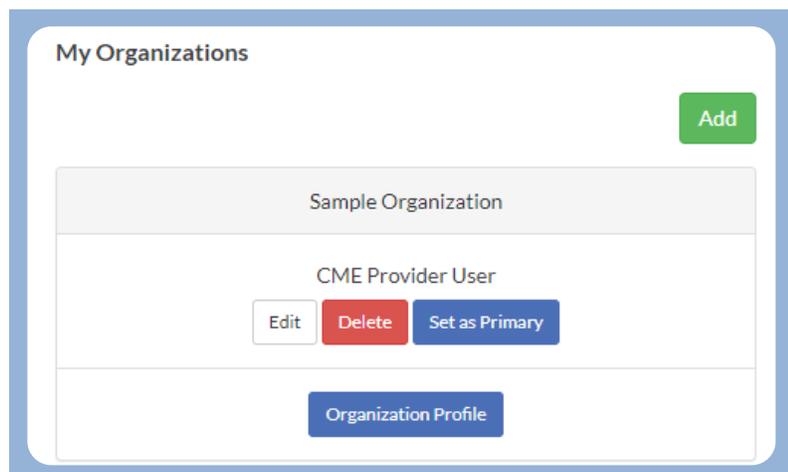
PLEASE NOTE: Your SDMS Organizational membership is valid approximately twelve months from the time of purchase. Additional beneficiaries may be added mid-term to any tier at a pro-rated amount. However, beneficiaries may not be removed mid-term for any reason, even if the employee is no longer employed with your organization. By enrolling employees as a beneficiary of your organization, you are committing to providing them with SDMS member benefits through the remainder of your SDMS Organizational membership term.

NAVIGATING TO YOUR ORGANIZATION'S SDMS PROFILE

SDMS Organizational memberships are managed through your personal SDMS.org profile.

1. Visit sdms.org/login to login or create your FREE personal SDMS.org user account using your preferred email address. All SDMS communication will be sent to this email address.
2. Once logged in as an individual, click on **"My Profile"** (top right).
3. In your personal profile, on the **"Profile Home"** tab, scroll down to the **"My Organizations"** section at the bottom.
4. Click the **"Add"** button to add a new organization to your profile or click the **"Organization Profile"** button to manage your organization's SDMS membership.
5. For any organization in your profile, the **"Relationship Type"** determines your ability to manage your organization's SDMS Organizational membership.
 - a. To change your **"Relationship Type"**, click the **"Edit"** button.
 - b. To add additional **"Relationship Types"** to the same organization, click the **"Add"** button.
6. Only the following Relationship Types can manage an organization's membership:
 - a. CME Provider Users
 - b. Program Directors
 - c. Org Membership Managers
 - d. Primary Contacts

If you have questions about Relationship Types, email membershipdept@sdms.org



IMPORTANT: It is imperative that you choose the correct organization to associate with your profile. For example, Sample University may exist in several forms in the SDMS database: Sample University, Sample University – DMS Program, Sample University – CVT Program, and Sample University Health Center.

To receive SDMS Organizational member benefits for Sample University – DMS Program, make sure that you are managing membership for that organization and not a similarly named or related organization in the SDMS database.

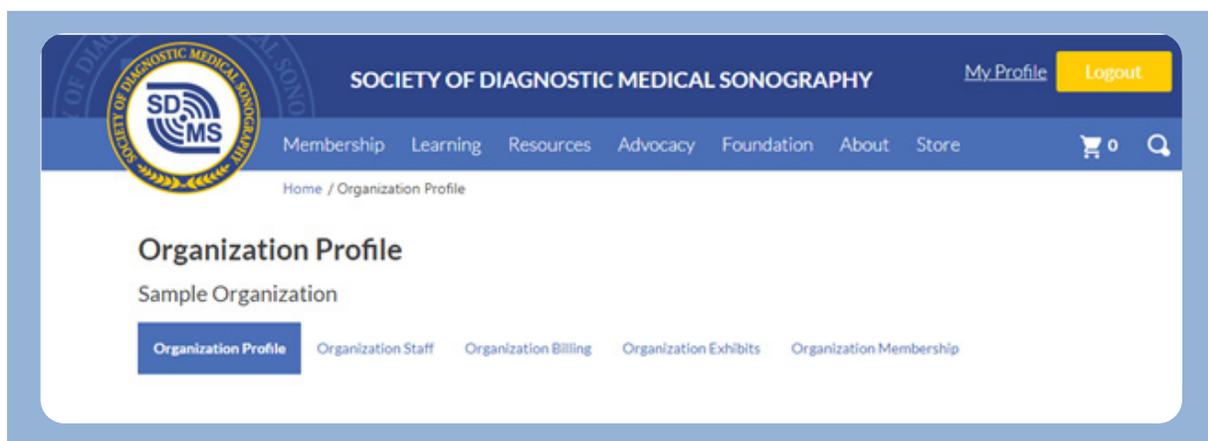
Contact the SDMS with questions: membershipdept@sdms.org

UNDERSTANDING YOUR ORGANIZATION'S SDMS PROFILE

After clicking the "Organization Profile" button on the organization listed under "My Organizations" in your SDMS.org profile, you will be routed to your organization's SDMS.org profile.

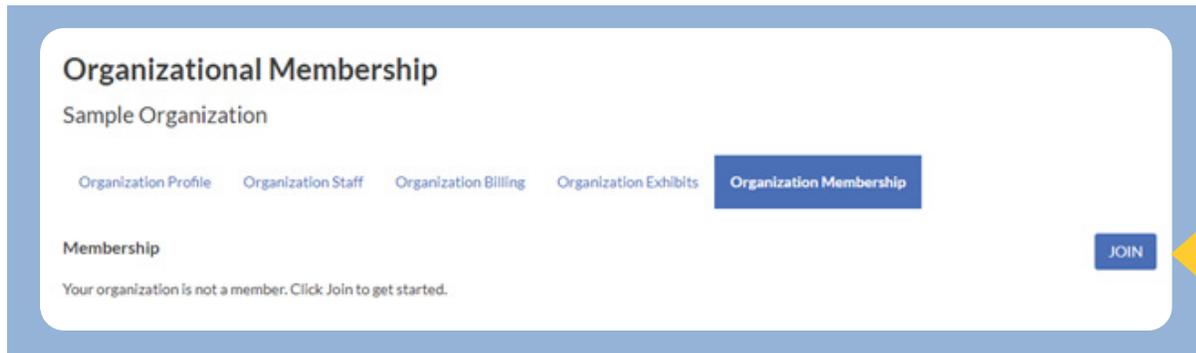
There are five tabs across the top of your organization's SDMS.org profile:

1. **Organization Profile:** Manage your organization's demographic and contact information here.
2. **Organization Staff:** Add, edit, and remove your organization's staff here. **Please note** that this page does NOT give anyone access to SDMS member benefits. This page simply associates individuals with your organization and defines their "Relationship Type".
3. **Organization Billing:** View and pay your organization's invoices here, including SDMS Organizational membership invoices once created.
4. **Organization Exhibits:** Manage your SDMS Annual Conference exhibit booths here if you are an exhibitor.
5. **Organization Membership:** Join as a new SDMS Organizational member, renew your existing SDMS Organizational membership, or add new beneficiaries to your SDMS Organizational membership.



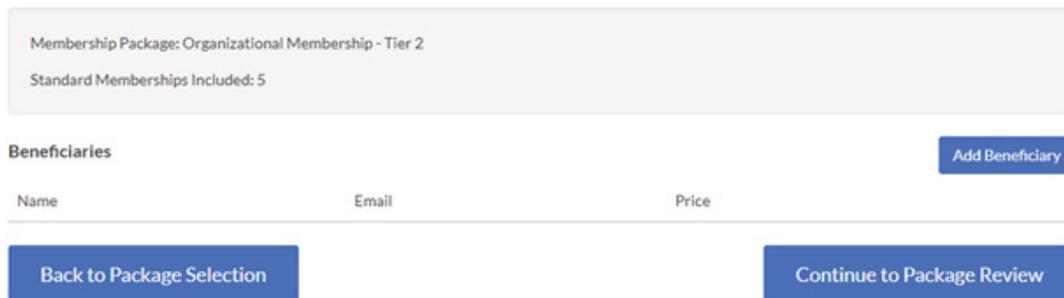
JOINING AS A NEW SDMS ORGANIZATIONAL MEMBER

In your organization's SDMS.org profile, click on the "Join" button under the "Organization Membership" tab.

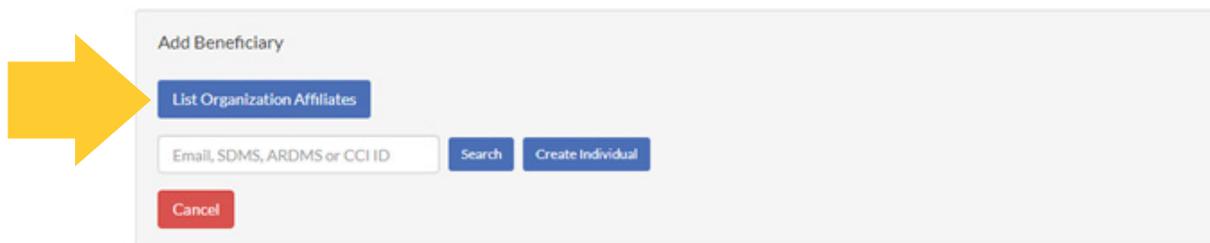


Step 1: Choose your membership tier based upon the number of desired beneficiaries and level of SDMS Organizational membership. Additional beneficiaries may be added to any tier for \$165 each.

Step 2: Add your beneficiaries by clicking the "Add Beneficiary" button.



a. The "List Organization Affiliates" button provides access to a list of individuals already associated with your organization so that you can add them as a beneficiary.



b. Or search for individuals by the email address associated with their SDMS account or by their SDMS, ARDMS, or CCI number. Once located, click the "Select" button to add them to your beneficiary roster. Add as many beneficiaries as needed.

IMPORTANT: If your organization's beneficiaries do not have personal SDMS.org profiles, ask them to create their own FREE SDMS.org profile at: <https://www.sdms.org/account/create-sdms-account> before proceeding with any SDMS Organizational membership transaction.

Step 3: Review your SDMS Organizational Membership selection and click the **"Add to Cart"** button to pay online with a credit card or click the **"Pay by Check"** button to generate an invoice to pay at a later date or to provide to your Accounts Payable Department.

Product	Qty	Price	Total
Organizational Membership - Tier 2 (5 members)	1.00	\$825.00	\$825.00
			Total: \$825.00

Checkout online by credit card  

Generate a formal invoice, allowing you the flexibility of print and mail. Please be sure to include the invoice number in the memo line of your check.  

IMPORTANT: Until the invoice for SDMS Organizational membership is paid in full, the join/renew process for your SDMS organizational Membership is not complete and your beneficiaries will not have access to SDMS member benefits.

RENEWING AN EXISTING SDMS ORGANIZATIONAL MEMBERSHIP

SDMS staff will email renewal reminders to the following Relationship Types at both 90-days and 30-days prior to your SDMS Organizational membership expiration date.

- CME Provider Users
- Program Directors
- Org Membership Managers
- Primary Contacts

NOTE: To ensure uninterrupted access to SDMS member benefits for your organization and your beneficiaries, it is important to pay your renewing membership dues prior to your SDMS Organizational membership expiration date. Expiration dates will not be adjusted for late payments.

To renew your SDMS Organizational membership, under the **"Organization Membership"** tab in your organization's SDMS.org profile, click the **"Renew"** button. Note: The **"Renew"** button will not be available until 90-days prior to the expiration date of your Organizational membership.

During renewal, you may make changes to the beneficiaries associated with your SDMS Organizational membership. You will need to know the email address associated with each beneficiary's personal SDMS.org profile and/or their SDMS, ARDMS, or CCI number.



Organizational Membership
General Hospital

Organization Profile Organization Staff Organization Billing Organization Exhibits **Organization Membership**

Membership RENEW

Member Type	Status	Member Since	Term Start	Term End
Organizational Member - Tier 2	Active	1/4/2018	2/1/2022	1/31/2023

Beneficiaries You can add beneficiaries during renewal DOWNLOAD ROSTER

SDMS #	Name	Email	Start Date	End Date
998765	Shawna Graham	grahams@example.com	2/24/2021	
991234	Chris Doppler	dopplerc@example.com	2/1/2021	
998764	Crystal A. Ray	rayca@example.com	1/31/2018	

Follow the same steps outlined above in the “Joining as a New SDMS Organizational Member” section, making changes to your selected tier and beneficiaries as needed.

ADDING NEW BENEFICIARIES IN THE MIDDLE OF A MEMBERSHIP TERM

In your organization’s SDMS.org profile, under the “**Organization Membership**” tab, click the “**Add Beneficiary**” button. On the next screen, click the “**Add Beneficiary**” button again, proceed through the steps until checkout.

Organizational Membership
Company, Inc.

Organization Profile Organization Staff Organization Billing Organization Exhibits **Organization Membership**

Membership

Member Type	Status	Member Since	Term Start	Term End
Organizational Member - Tier 2	Active	6/22/2022	7/1/2022	6/30/2023

Beneficiaries ADD BENEFICIARIES DOWNLOAD ROSTER

SDMS #	Name	Email	Start Date	End Date
998765	Meg Hertz	hertzm@example.com	6/22/2022	
991234	Tim Porall	porallt@example.com	6/22/2022	
998764	Anna Thomik	thomikanna@example.com	6/22/2022	

You may add as many beneficiaries as needed at \$0 until you reach your membership tier's allowed quantity and for \$165 each after that, prorated for the remainder of your SDMS Organizational membership term. New beneficiaries will not have access to SDMS benefits until any associated invoices have been paid.

You may neither delete any beneficiaries until your organization is in its renewal period nor may you add new beneficiaries during your renewal period (90-days prior to your expiration date).

