

PMTNM Communication & Request System - User Guide

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Last Updated: January 9, 2025

For: All PMTNM Members and Public

Current Workflow System Status

Available Workflows (Raw API Response):

```
{/api/workflow/workflows}
```

What Is This System?

The Professional Music Teachers of New Mexico (PMTNM) Communication & Request System is a simple way to:

- **Submit requests** to the organization (like accessing financial records or asking questions)
- **Track your requests** from start to finish
- **Stay informed** about requests you care about
- **Ensure accountability** - nothing gets lost or forgotten

Think of it like a support ticket system, but specifically designed for PMTNM's needs.

Why Do We Use This System?

Before This System:

- Emails could get lost in inboxes
- No way to track if requests were handled
- Hard to tell who was responsible

- Difficult to follow up on old requests

With This System:

- ☑ Every request is logged and tracked
 - ☑ You can see the status of your requests anytime
 - ☑ Automatic reminders ensure timely responses
 - ☑ Complete history of all communications
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How to Submit a Request

Step 1: Go to the Contact Form

Visit: <https://pmtnm.org/contact.php>

Step 2: Choose What You Need

Select from the dropdown menu:

- **Financial Records Access Request** (members only)
- **Membership Inquiry** (anyone)
- **Get Involved - Volunteer Interest** (anyone)

Step 3: Fill Out the Form

- **Your Name** - So we know who to help
- **Your Email** - Where we'll send updates
- **Subject** - Brief description of your request
- **Message** - Explain what you need in detail
- **Specific fields** - Some requests have additional questions

Step 4: Submit

Click "Send Message" and you'll receive:

- A confirmation message
- A ticket number (like `ticket_abc123`)
- An email with your ticket details

- A link to track your request
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Tracking Your Requests

View All Your Requests

Go to: https://pmtnm.org/workflow/my_requests.php

Here you'll see:

- **Requests you submitted** - Your questions and needs
- **Requests assigned to you** - If you're responsible for responding

Understanding Status

Each request has a status:

Pending Response

- Your request was received
- Someone is working on it
- You're waiting for their response

Responded

- Someone has replied to your request
- You can view their response in the ticket

Fulfilled (Pending Your Confirmation)

- The person handling your request believes it's complete
- **Action needed:** You must confirm if you're satisfied

Resolved

- Request is complete
- Everyone agrees it's done
- No further action needed

Unresolved

- Request was marked complete, but you indicated it's not
 - The responsible person will take additional action
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Requesting Ticket Closure (New Requirement)

What Changed?

Important: All workflow tickets now require a formal closure approval process before they can be marked as resolved.

How It Works

Old Process:

1. Recipient fulfills request
2. You mark as resolved
3. Ticket closes

New Process:

1. Recipient fulfills request
2. You submit closure request with documentation
3. **Workflow manager reviews and approves**
4. Ticket closes

Why This Change?

This ensures:

- Proper documentation of completion
- Workflow manager oversight
- Quality control and accountability
- Audit trail for all closures

Submitting a Closure Request

When a request is marked as fulfilled, you'll see a new form:

Step 1: Document Completion

- Write detailed notes explaining how the request was fulfilled
- Include: dates, actions taken, what was provided, any relevant details
- **Required:** Documentation notes (max 5,000 characters)

Step 2: Attach Supporting Files (Optional)

- Upload files that prove completion
- Examples: PDFs, screenshots, receipts, confirmation emails
- Max 10MB per file, 5 files per request
- Allowed types: PDF, JPG, PNG, DOC, DOCX

Step 3: Submit for Approval

- Click "Submit Closure Request for Approval"
- Request goes to workflow manager
- You'll receive email confirmation

Step 4: Wait for Review

- Workflow manager reviews your documentation
- They will approve or deny
- You receive email notification of decision

If Your Closure Request is Approved

☑ You'll receive an email:

- Confirmation of approval
- Any notes from workflow manager
- Ticket is now resolved and closed

No further action needed!

If Your Closure Request is Denied

⚠ You'll receive an email explaining:

- Why it was denied
- What needs to be addressed
- Instructions for resubmission

Next steps:

1. Read the denial reason carefully
2. Work with the recipient if needed
3. Address the issues mentioned
4. Resubmit with updated documentation

The ticket remains open until properly documented and approved.

Example Closure Documentation

Good Example:

Provided member with access to 2024 financial records on January 9, 2025.

Actions taken:

- Compiled monthly financial statements (Jan-Dec 2024)
- Prepared annual budget summary
- Included audit report from external auditor
- Created summary document explaining key figures

Delivery:

- Sent via email on 1/9/2025 at 2:30 PM
- Member confirmed receipt same day
- All requested documents provided in PDF format

Attached: Email confirmation from member acknowledging receipt

Needs Improvement:

Sent the files to them.

Why? Not enough detail for workflow manager to verify completion.

Tips for Good Documentation

Be Specific:

- "Provided information"
- "Sent PDF copies of all 2024 board meeting minutes via email on 1/9/2025"

Include Dates:

- ☐ "Sent last week"
- ☐ "Sent on January 9, 2025 at 2:30 PM"

Explain What Was Provided:

- ☐ "Gave them what they asked for"
- ☐ "Provided: (1) membership application form, (2) payment instructions, (3) welcome packet"

Include Confirmation:

- ☐ "They should have received it"
- ☐ "Member confirmed receipt via email (attached)"

Attach Evidence:

- Upload confirmation emails
- Screenshots of sent messages
- Receipts or proof of delivery

Workflow Comparison at a Glance

Feature	Financial Access	Membership Inquiry	Volunteer Interest
Who can use	Members only (login required)	Anyone (public)	Anyone (public)
Goes to	Secretary-Treasurer	System Admin	President
Also CC'd	President + WF Manager	WF Manager	WF Manager
Response deadline	14 days	7 days ☐	14 days
Special fields	Document checklist ☐	None	None
Purpose	Governance/transparency	Information/joining	Connection/service
Tone	Formal/regulated	Helpful/informational	Welcoming/exploratory
Handbook basis	Section VI required	General membership	Committee participation
Typical outcome	Documents provided	Questions answered	Committee connection

Common Workflows

Requesting Financial Records (Members Only)

This workflow is unique because it has a document checklist.

Steps:

1. **Login first** (required for financial access)
2. Go to **Contact Form** or **Tools → Request Financial Information**
3. Select "Financial Records Access Request"
4. **Check which specific documents you need:**
 - Financial ledger/register
 - Checkbook/transaction records
 - Receipts and vouchers
 - CPA reports
 - Budget documents
 - Other (specify in message)
5. Explain why you need them (in message field)
6. Submit

What happens:

- Request goes to **Executive Secretary-Treasurer** (financial officer)
- **President automatically copied** (oversight/governance)
- Workflow Manager copied (system tracking)
- You get a ticket number
- Expected response: within **14 days**

Why the checklist?

- Secretary-Treasurer knows exactly what to gather
- No ambiguity about which documents
- Faster processing (clear requirements)
- Better audit trail

- Meets handbook governance standards

Asking About Membership (Anyone)

This workflow has the fastest response time (7 days) and is completely open-ended.

Steps:

1. Go to **Contact Form** (no login needed)
2. Select "Membership Inquiry"
3. **Ask any membership-related question** (no checklist, just explain)
4. Submit

Example questions:

- "How much does membership cost?"
- "What are the benefits of joining?"
- "Is there a local district in my area?"
- "How do I renew my membership?"
- "Can I join if I teach privately?"

What happens:

- Request goes to **System Administrator** (membership expert)
- Workflow Manager copied (tracking)
- You get a ticket number
- Expected response: within **7 days** (fastest!) ☐

Why no checklist?

- Membership questions are too diverse for checkboxes
- People often don't know what to ask
- Conversation is more effective than forms
- Allows for personalized responses
- Flexibility encourages inquiry

Why fastest deadline?

- Prospective members shouldn't wait long

- First impression matters
- Momentum for joining
- Competition with other organizations

Volunteering or Getting Involved (Anyone)

This workflow goes directly to the President for personal attention and committee matching.

Steps:

1. Go to **Contact Form** (no login needed)
2. Select "Get Involved - Volunteer Interest"
3. **Share freely:** Your interests, skills, experience, availability
4. Submit

What to include:

- Areas that interest you (programs, festivals, technology, etc.)
- Your teaching background and expertise
- Time you can commit
- Leadership experience
- Specific committees you're curious about
- What you hope to contribute

What happens:

- Request goes to **President** (organizational leader) ☐
- Workflow Manager copied (tracking)
- You get a ticket number
- Expected response: within **14 days**

Why it goes to President:

- Personal touch for volunteers
- President knows all committee needs
- Can match you to best fit
- May identify leadership potential

- Relationship starts at top
- Shows PMTNM values volunteers

Why no checklist?

- Committee names might not be familiar
- Skills often apply across multiple areas
- Creative opportunities might emerge
- Personal interests are nuanced
- Better to have conversation than constrain

Typical outcome:

- Introduction to committee chair
- Invitation to next meeting
- Mentorship assignment
- Project collaboration opportunity

Understanding Email Notifications

Initial Request Email

Who receives it:

- The person responsible for handling your request
- You (copy)
- Anyone on the standard CC list

What it contains:

- Your ticket number
- What you requested
- Deadline for response
- Action buttons for the responsible person

Response Email

Who receives it:

- You (the person who made the request)
- The person who responded (copy)

What it contains:

- The response message
- Link to view full ticket
- Option to mark as resolved

Fulfillment Email

Who receives it:

- You (the person who made the request)
- The person who fulfilled it (copy)

What it contains:

- Notice that request was fulfilled
 - Any notes from the person who handled it
 - Buttons to mark as resolved or still unresolved
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Frequently Asked Questions

Q: Can anyone submit a request?

A: It depends on the request type:

- **Financial Records Access** - Members only (must be logged in)
- **Membership Inquiry** - Anyone
- **Get Involved** - Anyone

Q: How do I know if my request was received?

A: You'll receive:

1. A confirmation message on screen
2. An email with your ticket number
3. The request appears in "My Requests" page

Q: What if I don't get a response?

A: The system has automatic reminders:

- If the responsible person doesn't respond by the deadline, they receive reminders
- You can also check the status in "My Requests"
- If urgent, you can contact admin@pmtnm.org

Q: Can I update my request after submitting?

A: Not directly, but you can:

- View the ticket page
- The responsible person can add responses
- You can clarify in the resolution notes

Q: Who can see my requests?

A:

- You (the originator)
- The assigned recipient
- System administrators

Requests are **not** publicly visible to all members.

Q: What if I mark something as "Not Resolved" by mistake?

A:

- The responsible person will receive a notification
- They can respond again
- You can then mark it as resolved
- Contact the recipient directly if you need to explain

Q: Do I need to be logged in to view tickets?

Tips for Effective Use

For Request Submitters:

1. **Be specific** - Clear subject lines and detailed messages get faster responses
2. **Check your email** - Important updates come via email
3. **Confirm completion** - Always mark requests as resolved or unresolved

For Recipients (People Handling Requests):

1. **Respond through the system** - Don't reply directly to emails
 2. **Use the action buttons** - They ensure proper logging
 3. **Add notes** - Explain what you did when marking as fulfilled
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Getting Help

System Issues

If you encounter technical problems:

- Contact: [System Administrator](#)
- Or visit: <https://pmtnm.org/contact.php>

Request Status Questions

If you have questions about a specific request:

- View the ticket in "My Requests"
- Check the message thread for updates
- Contact the assigned recipient directly if urgent

Feature Requests

Have ideas for improving this system?

- Submit a "Get Involved" request
 - Mention it's about the workflow system
 - Describe what you'd like to see
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Quick Reference

Submit a request: <https://pmtnm.org/contact.php>

View your requests: https://pmtnm.org/workflow/my_requests.php

Admin dashboard: https://pmtnm.org/workflow/admin/workflow_admin.php

Response deadlines:

- Financial Records: 14 days
 - Membership Inquiry: 7 days
 - Get Involved: 14 days
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Privacy & Security

Your Data

- Requests are stored securely
- Only authorized people can view them
- Complete audit trail maintained
- No public access to tickets

Email Security

- All action links use secure tokens
 - Tokens expire after 48 hours
 - Each token works only once for its specific action
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System Design Philosophy

This system was built with these principles:

1. **Transparency** - Everyone knows what's happening
 2. **Accountability** - Every action is logged
 3. **Communication** - All parties stay informed
 4. **Simplicity** - Easy to use, hard to lose track of requests
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Have questions about this guide?

Contact us: <https://pmtnm.org/contact.php>

Technical documentation:

See: `public/workflow-system-documentation.md` for detailed technical information