

ANNEX C – APPLYING ON-LINE WITH QSL CARDS

NEW SOFTWARE WILL BE INTRODUCED IN 2017 TO REPLACE IOTA'S EXISTING SYSTEM AND THIS IS LIKELY TO INVOLVE SOME CHANGES TO THE PROCEDURES OUTLINED BELOW. THESE WILL BE EXPLAINED IN THE ONLINE APPLICATION MODULE.

REGISTRATION

1. To register you need to ask your Checkpoint for a password. To do this:

- Click on 'Register' on the right-hand side of the screen which takes you to 'Register new user'. Then follow instructions.
- Complete the personal details input form as fully as possible.
- On submission your application will go to your local checkpoint automatically. Normally this will be the checkpoint with responsibility for processing applications from your country. However, in the case of doubt the system will offer you a choice of possible checkpoints. You will need to make sure you have a checkpoint shown as allocated. Click 'Submit'.

You then receive from your Checkpoint an e-mail issuing you a password.

2. **Changing a Password** – On logging in you can change your password by clicking on 'Edit my profile' on the right-hand side of the screen and completing the fields 'New password' and 'Confirm new password'. If you do change your password, make sure you choose one that cannot be guessed. When ready, click on 'Update', 'Logout' and then 'Login' again.

3. **Completing Personal Details** – Follow the procedure at paragraph 2 above to add extra personal details on the input form. Do not forget to enter a 'Display name' as certificates cannot be issued without one. Also please pay special attention to privacy options as UK law requires your agreement to the IOTA system and IOTA Management sending you various types of e-mail and displaying your score in published Honour Roll and Certificate listings. Failure to tick (check) 'Permit e-mail notifications' means that the server will not be able to tell you about changes to your account or the progress on submitted applications/updates. Similarly, failure to tick 'Listed in honour roll' means that you will not be listed!

4. **Claiming RSGB Membership Discount** – If you tick the 'RSGB member' field, remember that you will need to provide, on the occasion of each award submission, proof of continued membership in the form of a recent address label from *RadCom*, the members' magazine (Rule C.1.2).

5. **Adding Previous Callsigns** – If you have a previous callsign for the same DXCC entity and plan to submit cards for contacts made using it, tell your Checkpoint on your first award submission but, first, ensure that the callsign is shown as having been issued to you on QRZ.com or HamCall.net. Also send your Checkpoint a sample QSL card. After checking, your Checkpoint will add your previous callsign to your personal details page. See Rule C.3.1 and Additional Note 1 for acceptable previous callsigns.

6. **Changing the Callsign on a Record** – If you permanently change your callsign while remaining in the same DXCC entity, inform your Checkpoint who will arrange for the callsign on your record to be changed by IOTA Management. Do not request a new password as your current password will continue to be valid and under IOTA rules you can have only one record. First, ensure that the callsign is shown as having been issued to you on QRZ.com or HamCall.net. Also send your Checkpoint a sample QSL card. Your previous callsign will be added to your personal details page.

7. **Adding a Second Current Callsign** – First, you need to check Rule C.3.1 and Additional Note 1 for guidance on acceptable second current callsigns as credit is not given for contacts made with contest or special event callsigns. Inform your Checkpoint of your wish to have a second current callsign added and follow the procedure outlined in Additional Note 1. A second current callsign (one only is allowed) needs to be approved by IOTA Management.

VIEWING AN EXISTING IOTA RECORD

8. Log in and on the opening screen click 'My Credits'. This allows you to view, if you already have a record:

- a summary of your current score, split by continent, for the Standard Category of Application and also for the VHF/UHF Category;
- a list of certificates and awards issued to date;
- a list of all your QSOs credited to date;
- a list of your 'Wanted' IOTA groups.

If this is your first application, you can look forward to this information as soon as you make a submission.

BUILDING A CLAIM

9. Before proceeding to the claim stage, click on 'your checkpoint's page' for instructions from your Checkpoint as well as information on how to reach him/her if you have a query and a guide on the currencies that he/she accepts. To build a claim, either for an initial application or as an update of an existing record, first choose your method of QSO entry in 'Add QSOs to your application'. You are presented with four options: 'ADIF Log Upload', 'IOTA Contest QSO matches', 'From Keyboard (type QSOs)' and Club Log QSO matches – if not already live, the last one is expected to be added by mid-2016.

10. **QSL Supported QSOs** – the option 'From Keyboard (type QSOs)' is the one to use for claiming credit with QSL cards. Only use this if you have the QSL in your possession ready for submission to your Checkpoint. Click on 'From Keyboard (type QSOs)' and in 'Add a QSO' in 'QSOs in IOTA Update for [callsign]' complete the input form for each contact for which you wish to claim credit. Enter all the details required as accurately as you can. Most of the fields have a drop-down list of options and you need to select the option that is confirmed by your card. Make sure that the 'My Callsign' field is filled with the callsign you used at the time of contact if it is different from the registered callsign. Click 'Submit' – this signifies that the credit has been added to the list of credits claimed but not at this stage passed to your Checkpoint.

SUBMITTING A CLAIM (STAGE ONE)

11. On receipt of a claimed credit the server checks that you don't already have a QSO credited for this reference number and performs a number of other checks before either adding it to your claim or rejecting it with a 'Serious error' message. The system will on occasion correct an incorrect callsign format (e.g. VY0/NU2L may be changed to NU2L/VY0 as that was the callsign used) and may even attempt to move the credit to another reference number if, for example, there is known to be an incorrect IOTA number printed on the card.

12. In the event of the warning 'Fewer than four credits awarded for this activation' check that the callsign has been entered correctly. It is quite likely that the card is OK but it could be that a /P or /xxx has been omitted.

13. **VHF/UHF QSOs** – Note that previously the rules allowed for a VHF/UHF credit to count for the Standard Category of Application in addition to the VHF/UHF Category. This has now changed and a VHF/UHF credit will now no longer count for the Standard Category.

14. Until you are ready to send your application to your Checkpoint, you can add further QSOs to your claim from time to time and they will remain on the server indefinitely.

SUBMITTING A CLAIM (STAGE TWO)

15. When you are ready for your application/update to be approved, check that you have all the QSL cards required and then click on 'Send application'. The system will tell you the certificates or awards to which you are entitled and ask you to confirm the ones you wish to purchase. Given ever-increasing postal charges and technological advances IOTA Management has decided that now in the 21st century all certificates should be sent electronically. Exceptionally, if this causes real problems, an applicant can ask for certificates to be sent by post but this will attract an extra charge. The system will then calculate the fees owing and ask you to confirm the invoice and claim declaration.

16. At the same time as despatching the electronic submission, send the supporting QSL cards, arranged in IOTA reference number order, and payment to your Checkpoint. Do not forget to include return postage for the cards.

17. At this point you can make no further changes to the application on-line and your Checkpoint will not want you to make any changes by e-mail or telephone! If you receive a much-needed card the day after you sent the submission or if you find that you have omitted to request a certificate or if you want a certificate sent by post instead of electronically, you will need to make a fresh submission. You can do this only after your first submission has been processed.

18. When your submission has been processed, you will receive an 'Application Accepted' e-mail listing the QSOs accepted and informing you of any rejected with reasons and of any alterations to the contact details. It will also confirm the issue of any certificates or awards requested.

19. Update your record whenever you want – there is no limit on the number of times per year, but note that there is a minimum update fee.

20. All communication about your application including the acceptability of a QSL card or progress on the issue of a certificate or award must be routed through your

Checkpoint, and not sent direct to IOTA Management. Checkpoints work to a manual of instructions and will refer to IOTA Management for a decision any matters that are not covered there.

PRIVACY ISSUES

21. As mentioned in paragraph 3 above the IOTA website has a number of privacy options that users can set themselves and we ask you to review these carefully.

22. We will do our best to ensure that our server is secure, but there is no such thing as 100% security in the Internet world, so, if you are concerned about any of your personal data (either your IOTA score, if it is marked as confidential, or your address) becoming known, then please contact the IOTA IT Team¹ to discuss whether some or all of it needs to be deleted. Please note, however, that you will not be able to continue to develop your score in our listings unless your callsign, e-mail and QSO details can be held on-line.

GOING THE ADIF LOG UPLOAD ROUTE

23. The 'ADIF Log Upload' option was introduced in late 2014 and some applicants prefer to use this as a first step to an application or update. By uploading your station log in ADIF format you can have the system tell you what contacts you have in your log that might be new IOTA counters. On the 'My Credits' page click on 'ADIF Log Upload' and follow the instructions to upload your log. This will then be processed after a short delay of perhaps two hours. Your existing credits will be searched and QSOs representing new ones will be presented as possible additions to your record. You will then need to select which QSOs should be added to your claim.

24. In the 'My Credits' area you will find the server has separated the QSOs into three sections:

- QSOs during the dates of the IOTA Contest – see Annex D for more about this;
- QSOs logged with an IOTA reference number;
- QSOs which may be with an IOTA you need (based on server knowledge of callsigns and dates of previous activations).

You will need to select the QSOs which you wish to have added to your claim. In the case of IOTA Contest QSOs where there is a match with the contest station log on the database, you do not need to provide a QSL card as credit will normally be given. However, for other QSOs you should only select those ones for which you have the QSL cards.

25. Finally, you will be asked to submit the application – at which point you get the ability to edit or delete QSOs and add any QSOs not in the ADIF log.

26. Note that the process above must be completed within 30 days of submitting your ADIF log, otherwise your log will be deleted from the server and you will need to start again.

27. More detailed instructions on the ADIF Log Upload option are available on the IOTA web-site.

DON'T FORGET, NEW IOTA SOFTWARE COMING IN 2017.

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