From the Members Tab

1. Add new members
2. Update member info

From the Home screen/Dashboard:

1. Accept valid transfers
2. Review Pending transfers
3. Review exceptions and make updates and email artifacts to MR
4. Review Exempt Over 4 Months/ Applicant Over 4 Months reports
5. Process eBill

Working the eBill:

1. Verify Dues: Review and verify the Local and LCA dues rates for accuracy. If they are incorrect contact your MR team immediately with the correct rates. You cannot work your eBill until this is corrected.
2. On the Dues Summary Tab: Review validation issues for this eBill – these are the issues you will resolve as you work through the eBill.
3. If any Local pay – work the steps on the Local pay tab
    a. Upload dues check offs received from the carrier
    b. Enter the total money received from the carrier to be applied for the billing month
    c. Update individual members received amounts
    d. The totals reported in a, b, and c must match to move on
4. Status changes – provide necessary dates, update member statuses as necessary
    a. **Review remaining active, exempt and applicant members. Make changes to their statuses as necessary – Use information gained from reviewing the Exempt Over 4 Months/ Applicant Over 4 Months reports**
5. Balance receipts – add change types to adjust members' billed amounts and provide out of balance reasons.
6. Bill adjustments – this is where adjustments can be requested for prior months eBills by either adding billed amounts for members or requesting returns for members.
    a. If you see members in the additional dues section, be certain that there is a valid reason for it. Work with your MR to investigate these instances.
7. Email artifacts to support change types and bill adjustment to your Membership Representatives.
8. Submit the eBill

Once you've been notified that the eBill is certified (you will receive an email):

1. Search for the most recently certified eBill (eBill History)
2. Go to Final Bill tab (eBill History)
    a. Pull Final Statement Report, Exempt/Status Change Report, and Follow Up Report
3. Using the Final Statement Report, **Process the eBill final statement into WinStabs**
4. If payment to TD required, write check, print voucher (from WinStabs-NMR) and send payment to the TD office
5. Pull the member variance report from the Dues Menu (for use in generating the treasurer's monthly meeting report, issuing refunds, and updating members' payroll deductions)
6. Issue member refunds as necessary (Enter refunds in TD Connect-Member Record & document disbursement in WinStabs)
7. Review/Pull your "Member Billed Changes" report for upcoming changes (Home screen or Reports)
8. Update payroll deductions as necessary (use the eBill follow up, variance report & Member Billed Amount changes reports)