Home Screen
The home tab is where you will start every TD Connect session. It is your landing page and dashboard.

Alerts & To Do Items
- Process eBill – this is a quick link to the next eBill available to work.
- **Member Billed Changes*** – this is a quick link to the report that shows upcoming changes to members billed amounts due to Dues changes, DIPP, PAC, Group Disability and UTUIA policies. ***See the end of this document for special information on UTUIA premiums on the eBill.**
- Accept Transfers – these are transfer requests that other locals are waiting for you to respond to.
- Pending Transfers – these are transfer requests that you have asked other locals for and are waiting on responses from other treasurers.
- Missing Addresses – members that we do not have a valid address for. These members have not received their new member kit from the TD office. Member address should be provided as soon as possible.
- Missing Emails – members that we do not have an email address for.
- Missing Application – members that dues have been received for but who we do not have an application on file for. Please send in signed applications to your Membership Representative.
- Missing Authorizations – member that we do not have dues authorization cards for. Please remit signed, dated dues cards to your Membership Representative.
- Missing Exempt Reason – quick link to a report of members that have been entered with "unknown" as the reason for e-49 status. Unknown as a reason is no longer allowed and the reason for exemption must be researched and updated to an acceptable reason type.
- Exempt Over 4 Months – quick link to a report of members that have been in exempt status for 4 or more months.
- Applicant Over 4 Months – quick link to a report of members that have been in applicant status for 4 or more months.
- Regular Officer Election – Shows if the reporting for a regularly scheduled election is open, submitted or certified.

eBill Summary – This area displays the last seven months of eBills, the submission date, certification date, amount owed to Local, if the payment has been disbursed, amount owed to PAC, amount owed to TD and if those payments were received.
- Months that are highlighted indicate that money is currently owed to TD
- An Asterix (*) indicates that there are notes about the disbursed payment
- Clicking on "View eBill Summary for Year" will provide a complete summary of each year of billing in TD Connect. Notes and details explaining any Asterix (*) are available here. If a payment has been held it is shown here with the reason.

Messages & Reminders - TD will post messages and reminders here for Local treasurers as necessary.

Drop Downs
- Local & LCA Dues – review your dues rates on file for the next eBill
- Seniority Maintenance Fee (SMF) Dues – view the dues rates for SMF members
- Local Information – Displays charter info, meeting info, LM # and EIN
- Local Officers – the roster of all Local and LCA level officers
- TD Office Contacts – contact information for resources in the TD office, including your Membership Representative
- Quick Links – links for websites treasurers use
- Training Links – links to training resources related to eBill
- Winstabs – upload Winstabs data and download latest versions of WinStabs-NMR

Members Menu

This is where you find all the member records for your Local members. Member record maintenance outside of the eBill will be handled here.

Local members - listing of local members that includes: LCA, status, status reason, carrier and employee ID. This is used to search for individual members so that you can pull up their member detail record. The menu defaults to current members, but you can search for members that have previously transferred out of the Local or members that are scheduled to transfer into the Local as well.

New members can be added by clicking the "Add" button the on the top right of the member list. To add a member the following minimum information is required to generate a new record:

- Membership Date
- LCA
- Employee ID
- Craft
- First Name
- Last Name
- Birthdate
- Valid Address

Although the above info is all required to generate a new record, it is highly recommended that you complete as many fields as you can so that you have complete contact information and complete records.

If the member already has a record in the system, an error message will be displayed. Contact your Membership Representative team for assistance. Do not attempt to trick the system by augmenting any of the member's data. This will only lead to issues with payroll deduction processing and the eBill.

The detailed record shows:

- Member details (header) - updates can be made to LCA, craft, carrier and employee ID here.
- Personal tab - updates can be made to basic demographic information here.
    - Address information – make updates to the member's address here.
    - Change History– shows any historical activity on this portion of the member record.
- Membership –
    - Member Activity - shows any historical activity on the member record.
    - Notes– add notes about the member as necessary.
- Dues Tab –
    - Dues/Deductions - shows current dues breakdown plus what is anticipated for the next two months.
    - Voluntary Deductions - shows currently effective deductions along with past/future deductions.
- Dues History tab-
    - Member Dues History - shows the member's current balance, billed amount and balance amount for all months. Print or Email a Member Billing Statement.
    - Member payments/refunds - shows any previously completed payments or refunds applied to the member's balance (treasurers still need to issue checks as necessary to get money to/from member). This is also where new payments/refunds can be added to the member's record and applied to their balance.
    - Payroll Deduction History - shows the local that received the money, the pay period for the deduction, the billing month it was applied to, and the amount deducted.
- Carrier Payroll – make permanent or one-time payroll deduction changes for members working for UP, KCS and LACMTA (this tab does not show for any member not in the employ of the carriers described)
- Positions Held tab –
    - Officer Positions – lists any officer positions the member may hold or have held.
    - Special Committees – lists any roles served on special committees.
- Representation tab – displays Local/LCA, GCA and SLB officers for the member

- Forms/Reports – this tab holds membership forms that are pre-populated with the member's information. Treasurers can print and have these forms signed by the member. This is also where you can find a member's dues receipt statement for the year.
  - Membership Application
  - Dues Authorization
  - DIPP Application
  - PAC Pledge Form
  - Termination of Membership Form
  - Member Dues Receipt Statement

Roster –a complete roster of all local members filtered by status type. The page also displays counts of currently active and exempt members. A count of total members (including inactive members) is also displayed. The roster can be:
  - exported to excel to be sorted and filtered as necessary (this includes phone number and email addresses)
  - downloaded to a report formatted for easy printing (only includes what it shown on the screen)
  - downloaded to a report formatted for printing address labels

All reports/downloads will display based on how the data is filtered using the status and LCA filters.

Transfers – a complete listing of all transfers associated with your Local. Pending transfers can be viewed/accepted/denied from this screen.

All TD Members - search for any member of the union to request transfer from their current union.
  - Rolodex icon allows you to view the member's current treasurer's contact info
  - Paper icon allows you to enter request transfer of the member into your local

Exceptions – a complete listing of all member exceptions. This includes missing applications, addresses, dues authorization cards and missing e-49 status reasons. Updates can be processed directly from this screen.

Status Review – a complete listing of all members that have either been in e-49 or applicant status for 4 or more months.

On a monthly basis, review the members/new hires on this report to make certain that there has been no change to the member/new hire's work history which may affect their status. If you are unable to access work histories, you must work with the Local or General Chairperson to get the necessary information. If any member/new hire on this report is actively working or if the member/new hire is no longer active, please take the necessary steps and/or reach out to your Membership Representative (MR) team to update the member record.

Note: the report is dynamic and will update as changes are made within TD Connect. It is recommended that you print the report and document the updates you make in the system on your printed report.

For members showing in exempt status:	Steps to correct/update
The e-49 reason is incorrect	Navigate to the member's record, click on "Update" in the Member Details section, select "Member Status Reason", select the correct status reason. Note: All eBills must be worked before this can be corrected.
The member has returned to work	With the next open eBill, look for the member on the "status changes" tab under "remaining members." Click on the member's name and select "active." If the member's return to work date goes back further than the eBill allows, choose the earliest date that it allows you to select. If the member owes for additional months, you will need to add the previous months in the "Bill adjustments" tab of the eBill.

The member is no longer active	With the next open eBill, look for the member on the "status changes" tab under "remaining members." Click on the member's name and select "Inactive." Enter the reason the member became inactive (Reasons are: Deceased, Resigned, Retired, Terminated, Moved to BLE, Moved to Other Union).
The member's status is correct	Navigate to the member's record, click on the membership tab, add a Notes entry that explains the reason for the member's extended status. Reasons the member's status may be correct: • Member on extended e-49 status due to health reasons. Expected return unknown. – *Be sure to routinely review work history.* • Member on extended e-49 status due to health reasons. Return expected on: (please provide date) – *Be sure to routinely review work history.* • Member on extended e-49 status due to discipline reasons. Expected return unknown. – *Be sure to routinely review work history and contact the LC/GC on status of member's arbitration.* • Member on extended e-49 status due to discipline reasons. Return/Termination expected on: (please provide date) – *Be sure to routinely review work history.* • Member on extended e-49 status due to furlough. Expected return unknown – *Be sure to routinely review work history.* • Member on extended e-49 status due to military. Expected return unknown – *Be sure to routinely review work history.* Make sure the payroll deduction is set up for the proper billed amount.

For new hires showing in applicant status:	Steps to correct/update
The new hire is actively working and has a dues obligation	With the next open eBill, look for the member on the "status changes" tab under "remaining members." Click on the member's name and select "active." If the member's start date goes back further than the eBill allows, choose the earliest date that it allows you to select. If the member owes for additional months, you will need to add the previous months in the "Bill Adjustments" tab of the eBill. Make sure the payroll deduction is set up for the proper billed amount and collect for any arrears that may be owed.
The new hire is currently furloughed but owes dues for a period of time prior to being furloughed	**Email your MR Team** with Member name, start date had they been active, Reason for e-49 status (Reasons are: Discipline, Furlough, Military, Sick/Disability) If the member ever comes back to active status the previous months that they owe for will need to be added on an open eBill in the "Bill Adjustments" tab of the eBill. Make sure the payroll deduction is set up for the proper billed amount, and plan to collect for any arrears that may be owed when the member returns to work.

The new hire never became a dues-owing member	With the next open eBill, look for the member on the "status changes" tab under "remaining members." Click on the member's name and select "Inactive." Enter the reason the member became inactive (Reasons are: Deceased, Resigned, Retired, Terminated, Moved to BLE, Moved to Other Union).
The member's status is correct	Navigate to the member's record, click on the membership tab, add a Notes entry that explains the member's extended status. Reasons the member's status may be correct: • New Hire is not working due to furlough without ever having a dues obligation– *Be sure to routinely review work history* • New Hire is not working due to discipline without ever having a dues obligation – *Be sure to routinely review work history and contact the LC/GC on status of member's arbitration.* • New Hire is not working due to military without ever having a dues obligation – *Be sure to routinely review work history.* • New Hire is not working due to medical without ever having a dues obligation – *Be sure to routinely review work history.* • New Hire is still under probationary period. Dues obligation to begin with (enter month) eBill. Make sure the payroll deduction is set up for the proper billed amount.

Notes – Shows a list of all notes entered on individual member records. This can be downloaded in report format by clicking on the blue download arrow.

<p style="text-align:center">Dues Menu</p>

eBill – is where you will find your next available eBill to work and submit. There is a shortcut to this section of TD Connect from the home screen as well.

eBill: Verify Dues - this form shows the current Local and LCA dues rates that the current eBill was generated with. Review and verify the rates. If they are incorrect contact your MR team immediately with the correct rates. You cannot work your eBill until the rates are updated and the eBill is regenerated.

eBill: Dues Summary – this tab shows a summary of the eBill for the month. The amounts on this page are DYNAMIC. They will change as the treasurer works the eBill for the month. Amounts on this page should not be used to populate forms in WinStabs or to write checks to TD.

   SMART TD Dues – these are the monies that are either to be held or remitted to the TD office.
• Prior – Amounts with a "Y" in the prior column indicate that those amounts are to be attributed to bills prior to the bill currently being worked. These amounts are discovered as the bill is worked and last days worked and back to work dates are entered into the eBill. Amounts listed without the "Y" are for the current bill.
• Level
   o SMART TD – money collected for the Transportation Division portion of the members' 5-part dues. (Part 1 of 5)
   o GCA – money collected for the General Committee of Adjustment portion of the members' 5-part dues. (Part 2 of 5)
   o SLB – money collected for the State Legislative Board portion of the members' 5-part dues. (Part 3 of 5)
   o PAC – money collected for contributions made to the UTU Political Action Committee.

- o DIPP – money collected for Discipline Income Protection Plan premiums
- o VSTD – money collected for Voluntary Short-Term Disability plan premiums
- o VLTD – money collected for Voluntary Long-Term Disability plan premiums
- o UTUIA***** – money collected for United Transportation Union Insurance Association
- Members – the "count" of members paying that dues rate
- Rate – the dues rate for a specific level of the 5-part dues structure. Treasurers should notify the TD office prior to the first of the month with any dues rate changes.
- Amount - the amount owed for the level. For dues levels: amount = members x rate.

SMART TD Dues To Return – this section will only show if the eBill indicates that there is money that was paid on previous month's bills that is to be returned with this month's bill.
- Member Dues Report – this PDF report shows, at a member level, the billed amounts and received amounts (via Direct Receipts) that the eBill was generated from. This is like the Direct Receipts Report from iLINK that was used to work the old paper bill.

Local/LCA Dues
- Prior – Amounts with a "Y" in the prior column indicate that those amounts are to be attributed to bills prior to the bill currently being worked. These amounts are discovered as the bill is worked and last days worked and back to work dates are entered into the eBill. Amounts listed without the "Y" are for the current bill.
- Level
  - o Local – money collected for Local portion of the members' 5-part dues. (Part 4 of 5) This is one part of the surplus sent/retained by the Local
    - ▪ Local Assessment – if there is an assessment in effect for the month, these amounts will show here. This level will only show if there is money applied to the level for the eBill month.
    - ▪ Local Initiation Fee – if there are initiation fees billed for the month, these amounts will show here. This level will only show if there is money applied to the level for the eBill month.
  - o Payroll Deductions (Over/Under) – money collected via payroll deductions that is either greater than or less than the total billed amount minus all liabilities. This is money that is either added or subtracted from the surplus sent/retained by the Local
  - o Prior Balance on Account – this is money that the Local owes the TD office or money that the TD office owes the Local. This was referred to as a PA-1 adjustment in the old paper-based system. Prior balance will be seen less and less as the eBills are worked.
  - o LCA – money collected for Local Committee of Adjustment of the members' 5-part dues. (Part 5 of 5) There is a separate level listing for each LCA in the Local. This is also one part of the surplus sent/retained by the Local.
    - ▪ LCA Assessment – if there is an assessment in effect for the month, these amounts will show here. This level will only show if there is money applied to the level for the eBill month.
  - o Members – the "count" of members paying that dues rate
  - o Rate – the dues rate for a specific level of the 5-part dues structure. **Treasurers should notify the TD office prior to the first of the month with any dues rate changes. Proper documentation in the form of meeting minutes should be provided to support the change.**
  - o Amount - the amount owed for the level. For dues levels: amount = members x rate.

Local/LCA Dues To Return – this section will only show if the eBill indicates that there is money that was paid on previous month's bills that is to be processed with this month's bill. The Local already has already received this money so it will not affect the TD bill amount, but the amounts listed here will be included in the Local/LCA fund payment report and must be processed into WinStabs-NMR.

<u>Local/ Carrier Receipts Breakdown– Dues Summary</u>
- Receipt Type
    - Paid to TD – these are amounts paid directly to the TD office via the direct receipts process. Money received in this manner is linked directly to the individual members' records. These files are the root data source that drive the automation of the eBill.
    - Paid to Local – these are amounts paid directly to the Local, aka "local pay." Money receipted in this manner requires the Local Treasurer to manually update the individual member records based on the carrier receipt file.
- Carrier - the individual source of the money receipted.
- Amount – the total amount receipted for the receipt type and carrier.

<u>eBill Validation Issues – Dues Summary</u> – Issues listed here must be cleared prior to the treasurer submitting the eBill for certification
- Total Carrier Amount Matches Local Pay Amount – For Locals with "Paid to Local" receipt types, the treasurer must input the total amount received at the local level from the carrier. This amount must be equal to the total expected/revised received amount for the affected members.
- Dues Check Off Document – For Locals with "Paid to Local" receipt types, the treasurer must upload the dues check off document from the carrier that documents the money received for each of the affected members. This document will be verified by the Membership Representative as part of the certification process.
- Missing Last Work Date – the treasurer must provide these dates for those members that the eBill system has flagged as newly exempt (e-49) for this billing month. The treasurer must also provide the last worked date for any member that they change from an active status to an exempt status. Providing these dates allows the eBill to automatically generate the billed amounts (what is owed) for each member.
- Missing Return to Work Date – the treasurer must provide these date for those members that the eBill system has flagged as newly active for this billing month. The treasurer must also provide the return to work date for any member that they change from exempt status to active status. Providing these dates allows the eBill to automatically generate the billed amounts (what is owed) for each member.
- Missing Balance Reason – the treasurer must provide a valid reason for each member whose payroll deduction amount does not match their billed amount. Providing these reasons allows the treasurer to manage these overages/underages in a responsible way and allows the eBill to generate follow-up reports.

eBill: Local Payments – this tab will only show if your Local has members employed by a carrier not on direct receipts.

Dues Checkoff List -- the dues checkoff file/document from the carrier must be attached in this section of the eBill. This file attachment will be verified by the Membership Representative as part of the eBill certification process.

Carrier Receipts – the total amount received from the carrier must be entered here. This amount must match what is reported on the dues checkoff file attached in the section above.

Local Payments – update the member records to match the dues checkoff from the carrier. The system will automatically generate a received amount based on the member status and billed amount from the last bill. If the actual received amount from the carrier, you must edit the record and enter the actual received amount here. If you receive money for a member that is not shown here, it is likely that they do not have a member record in TD Connect, and you will need to add the member to the system. The total of all received amounts for all members listed in this section must equal the total carrier receipts in the section above.

DLC members (Designated Legal Counsel) will show up in the Local pay section of the eBill. The reason they show here is because they belong to an LCA (DLC) that is indicated as Local Pay. But since they are not getting their dues paid for by a carrier, here's the simple process for managing their dues amounts:

1. On the Local pay tab, update the received amount to $0.00 – this is EVEN if the DLC member has written the Local a check. The eBill only processes payments received from carriers.
2. There is no need to upload any documents, or enter a carrier received amount.
3. If the member has written a check to the Local it will be processed into the payments section on the member record. It is recommended that Locals collect this money for the year in advance so that the Local is not fronting this money on behalf of the DLC.

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eBill: Status Changes – this tab is where status changes are worked for the affected members for that month's eBill. These statuses will remain in effect until either there is a change in data received by the system or the treasurer updates data in the system.

Member Status Types:
- Applicant Status – Member in the TD Connect system but has never paid dues. When dues are received via the eBill for the first time, the system flips the record to Active Status and the membership date is set for that month. If any pieces of the member record are missing, the member will be flagged with the corresponding exception.
- Active Status – Member paying dues and actively working in the craft or union – **must provide first day back to work if moving from exempt status to active status.** *Dues Objectors are considered Active Status members.
- Exempt (e-49) Status – Member who for any reasons, including sickness and disability, is not engaged in service where SMART holds the contract or in the service of the Transportation Division for a full calendar month shall, upon submitting to the Local Treasurer written request on the prescribed form, be relieved from the payment of all dues and assessments for subsequent calendar months until he/she again returns to service. – **must provide last day worked if moving from active status to exempt status.**
  Exempt Status Types:
    - Discipline
    - Furlough
    - Military
    - Sick/Disability
  Members that qualify for exempt (e-49) status do not have to pay:
    - All 5 parts of their dues

- o   Short-term disability premium
- o   PAC contributions
- o   DIPP premiums
- o   Members <u>are still responsible for premiums for any UTUIA products and Long-term Disability that they subscribe to</u>. When a member qualifies for exempt status, the UTUIA and/or VLTD Broker will work directly with the member to collect premiums owed. **The premiums will not be on the bill nor will the Local treasurer be responsible for collecting the premium when the member is exempt.** (Note: Any money that is earmarked for IA/VLTD premiums that is received for the month via payroll deductions for members qualifying for e-49 for the same month should be held and applied to the member's billed amount upon their return to active service.)

- Inactive Status – Person is no longer an active, dues-paying member of SMART TD
  Inactive Status Types:
  - o   Deceased
  - o   Resigned
  - o   Retired
  - o   Terminated
  - o   Moved to BLE
    - ▪   Members that are flipped to this status must complete the Termination of Membership form.
  - o   Moved to Other Union
    - ▪   Members that are flipped to this status must or chose to give up seniority in the craft(s) under SMART TD representation.

<u>Members with Status Changes</u> – this section shows members whose status has changed from the status reported on the last eBill. The eBill will automatically grab some of these status changes based on whether dues were received for the member or not. The treasurer can override any automatic status change generated by the eBill along with adding any status change that the eBill does not automatically generate.
- Exempt (E-49) to Active: Members automatically added here are the members that we DID NOT receive money for last month that we DO receive money for this month. Additional members can be added to this section by the treasurer updating the member's status manually. The first day back to work must be entered for those moving from exempt to active.
- Active to Exempt (E-49)/ Inactive: Members automatically added here are the member that we DID receive money for last month that we DO NOT receive money for this month. Additional members can be added to this section by the treasure updating the member's status manually. The last day worked must be entered for those moving from active to exempt.

<u>Remaining Members –</u> this section shows members whose status has NOT changed from the active or exempt (e-49) status reported on the last eBill. Treasurers can select individual members from this section and make status changes as necessary. This is where you can change an active member to Inactive status if necessary. If a member status is changed it will move the member up to the "Members with Status Changes" section. Note: Inactive members will not show in the remaining members section, but applicant members will show.
- This section should be reviewed monthly to make certain that there has been no change to the members' statuses.
- Members appearing in applicant status for three or more months should be reviewed.
  - o   If the member was furloughed immediately after their probationary period, flip the member to e-49 status with a last work date two months prior to the eBill month you are working.
  - o   If the member resigned or was permanently terminated, the member will need to be flipped in Inactive status on the eBill.
  - o   If the member is actively working and you have not received money, flip the member to active status with the correct date. You will need to investigate why you have not received a payroll deduction.
- Members appearing in e-49 status for three or more months should be reviewed.

- o If the member is e-49 discipline, a note should be added to the member's record with any notes about the status of the member's case.
- o If the member is e-49 furlough or medical, close attention should be paid to their work history so that pay roll deductions can be properly applied.
- o If a member currently appearing in e-49 status has become inactive, they should be flipped to Inactive status with the corresponding reason.

eBill: Balance Receipts – by default, this area will list all members whose TD billed amount is out of balance with their payroll deduction**. A reason must be provided for each member that is out of balance.** Adjustments that need to be made to a member's TD billed amount for changes effective on the member record for the billing month are worked in the Balance Receipts section.

TD Bill Change Types:
- **LCA change** – move a member from one LCA to another available LCA. If the dues rates are different between the two committees, the bill will be adjusted to reflect the new dues rate. Only LCA changes that are effective for the current eBill are worked here. If a change is to be made for a future bill, that change will be made on the member record.

- **Member Type** -
    - Regular – Active or Exempt(e-49) member that belongs to and is represented by an LCA. If moving from another member type, an appropriate LCA must be selected.
    - Management – member not subject to discipline, moves member to LCA "EXP", removes GCA and LCA dues (NOTE: the minimum dues required to be a SMART TD member is TD-SLB-Local dues)
    - IMO – insurance member only, moves member to LCA "IMO", removes all amounts except for insurance
    - DLC – designated legal counsel, moves member to LCA "EXP", removes GCA and LCA dues

- **DIPP Cancel** – treasurers can cancel a member's DIPP while working the bill as necessary. Members may cancel their plan at any time by either notifying their treasurer in writing or the TD office in writing. If the notification is direct to the TD office, the treasurer will be notified of the effective date of cancellation by letter from the TD office. Treasurers cannot cancel a member's DIPP without prior notification from the member or the TD office.
    - This type of change will be flagged with a pop-up indicating that you wish to make a permanent change to the member record. The member will be notified in writing of this change upon certification of this eBill.

- **DIPP Lapse** –A plan that is in "lapse" is only for a member in certain special circumstances. A member does not owe the premium while the plan is in lapse status. Treasurers can change a member's DIPP to lapse only for the following scenarios:
  - The member is not actively working in the craft and not subject to discipline (i.e. the member moves to management.)
  - The member is in the full-time employment of the TD (having previously worked for a carrier) – i.e. TD officers, field supervisors, field auditors, organizers.
  - The member is a Local Officer that receives a salary from the Local while on e-49 status from the carrier. (These members are considered active on the e-bill but are not required to pay DIPP premiums.)
  - For plans currently on lapse, a "DIPP Off Lapse" change type will be available as an option when the member regains eligibility in the plan.

- **PAC-Increase** - there are two types of ways to increase a contribution amount to PAC; one-time changes (increases) and recurring (permanent) contributions. Contributions can be made by anyone wishing to contribute. Members may opt to have their contributions gathered through payroll deductions.
  - **Increases made through the "Balance Receipts" tab on the eBill are never permanent changes or recurring changes to the member record**
  - One-time increases (including an increase from $0.00) to contributions can be made via the eBill using the "PAC-Increase" option
  - These types of contributions will be flagged with a reminder that if this is to be a recurring contribution amount that a pledge form must be sent to the TD office. Your Membership Representative will follow up with you if they see identical one-time change amounts for 2 or more months in a row. Failure to provide required documentation may lead to a delay in certifying the eBill.
  - If the member wishes to make a new contribution or increase to a current recurring contribution, a PAC Pledge form must be sent to the TD office and processed into the member record. The treasurer cannot add or increase a recurring PAC contribution on the member record.

- **PAC- Decrease** – there are two types of ways to decrease a contribution amount to PAC; one-time changes (decreases) and recurring (permanent) decreases/cancellations to contributions.
  - One-time decreases (including a decrease to $0.00) to contributions can be made via the eBill using the "PAC-Decrease" option and selecting the "one-time" button.
  - Members can decrease or cancel their PAC contribution at any time by notifying the TD office or their treasurer (preferably in writing). Permanent (recurring) decreases to contribution amounts and permanent cancellations of contributions can be made via the eBill using the "PAC-Decrease" option and selecting the "permanent" button.
    - This type of change will be flagged with a pop-up indicating that you wish to make a permanent change to the member record. The member will be notified in writing of this change upon certification of this eBill.

- **VSTD Lapse**–A plan that is in "lapse" is only for a member in certain special circumstances. A member does not owe the premium while the plan is in lapse status. Treasurers can change a member's VSTD to lapse only for the following scenarios:
  - The member is a part-time Local Officer that receives a salary from the Local while on e-49 status from the carrier. (These members are considered active on the e-bill but are not required to pay short-term group disability premiums.)
  - **Note:**
    - Members that move to management remain eligible for the VSTD plan. Treasurers cannot lapse a VSTD plan for a company officer. The member must choose to keep the plan or cancel the plan.
    - Members who are in the full-time employment of the TD (having previously worked for a carrier) – i.e. TD officers, field supervisors, field auditors, organizers remain eligible for the VSTD plan. Treasurers cannot lapse a VSTD plan for these members. The member must choose to keep the plan or cancel the plan.
- For plans currently on lapse, a "VSTD Off Lapse" change type will be available as an option when the member regains eligibility in the plan.

- **VSTD Opt-Out** – new hires are automatically enrolled in the SMART TD Voluntary Short-Term Disability plan. A member wishing to opt out of the plan must do so within 30 days of the plan's effective date/their membership date.
  - Example:
    - Payroll deduction is started in September.
    - Money is applied to dues for October.
    - Effective/Membership date is October 1.
    - Member has until October 30 to submit the VSTD waiver form.

  - Members that opt out during the opt out period have their plan marked as "opt out", meaning there will be no payment history for that member.
    - Any premiums that had been collected are to be returned to that member.
    - Your Membership Representative will work with you to return premiums that may have been collected on eBills prior to the one you are currently working.
    - The Local treasurer will be responsible for returning the over-collected premiums to the member as necessary through the processes available to them.
  - Treasurers can opt-out a member's plan while working the bill as necessary.
    - As proof of the opt-out, Treasurers must submit a copy of the VSTD waiver signed/dated by the member to their Membership Representative.
    - The eBill can only be certified if the waiver is received and approved in the TD office. If the waiver is not received the bill will be un-submitted and the change will need to be re-worked on the eBill.
- **VSTD Cancel** – treasurers can cancel a member's VSTD plan while working the bill as necessary. Members may cancel their plan at any time by either notifying their treasurer or the TD office. Cancellations must be communicated in writing from the member.
  - The preferred cancellation method is for the member to complete and sign the CANCELLATION of coverage form and send it to the TD office.
  - Cancellations will be effective the first of the month following the date the cancellation was **received**.
  - Any premiums received for months after the cancel date will be returned to the member via the Local's monthly bill.

- o Your Membership Representative will work with you to return premiums that may have been collected on eBills prior to the one you are currently working.
    - o The Local treasurer will be responsible for returning the over collected premiums to the member as necessary through the processes available to them.
  - The eBill can only be certified if the CANCELLATION of coverage form is received and approved in the TD office. If the form is not received, the bill will be un-submitted and the change will need to be re-worked on the eBill.

- **Initiation Fee** – Locals that have approved initiation fees into their bylaws can apply this one-time fee (Up to $25) to new members' bills.

Reason for Balance - options:
- **If the monthly variance is negative: meaning the payroll deduction is less than the billed amount and the member owes money for the month**
  - Apply from Member Balance –select this option when a member has positive balance (variance) on their account and the intent is to use that money to cover the money owed for the month.
    - The member's positive balance will be reduced by the amount of money that is owed.
    - This option is used when a treasurer has intentionally reduced the payroll deduction to offset the positive balance on the account OR when money is held on the account (held in escrow) to be applied when a member returns to active status.
  - Incorrect Payroll Deduction – select this option when a member's payroll deduction is incorrect and needs to be updated.
    - The member's balance will be reduced by the amount of money that is owed.
  - One Time Payroll Change/Pickup – select this option when a member's payroll deduction is incorrect and needs to be updated either to make a one-time change or to return it back to a recurring amount.

- **If the monthly variance is positive: meaning the payroll deduction is more than the billed amount and the member has paid more than what is owed for the month**
  - Apply to Member Balance–select this option when a member has negative balance (variance) on their account and the intent is to use this money to cover the money owed on their account.
    - The member's negative balance will be reduced by the amount of money received in addition to the billed amount.
    - This option is used when a treasurer has intentionally increased the payroll deduction to offset the negative balance on the account.
  - Incorrect Payroll Deduction – select this option when a member's payroll deduction is incorrect and needs to be updated.
    - The member's balance will be increased by the amount of money that is received.
  - Holding in Escrow – select this option when money is held for a member qualifying for Exempt status (e-49) with the intent to apply the money to the amount that will be billed when the member returns to active service.
    - The member's balance will be increased by the amount of money that is received.
  - Local Paying Annuity – select this option if the extra money received is for any type of annuity that the Local collects and pays on behalf of the member.
    - The member's balance will be increased by the amount of money that is received.
    - The treasurer will be responsible for posting a refund to the member's account equal to the annuity amount and issuing payment to the appropriate party as necessary.
  - One Time Payroll Change/Pickup – select this option when a member's payroll deduction is incorrect and needs to be updated either to make a one-time change or to return it back to a recurring amount.

- Money Received But Did Not Work – select this option when dues are received for a member but they **qualified** for a status where dues are not required (meaning the billed amount is $0). Situations for this reason can include:
    - The work period for the member's deduction is a last-half. The member worked during the work period but did not work the entire calendar month for the eBill.
    - The member received vacation or personal leave pay.
    - The member received worker's compensation or a settlement payment.
    - The member received back-pay or retroactive-pay.

> **Mass Update Feature** - The "Update Reasons" box allows treasures to apply a reason for a balance to multiple members at once. If there are multiple members with the same variance amount for the month, the amount will show in the form. The treasurer can elect to apply one reason for all the member with the amount.

eBill: Bill Adjustments – this section allows for changes to be made to bills that have already been submitted and certified. This section will also list dues collected for members that are not currently active in your local.

Dues to Collect - These are dues that were NOT paid on a bill for a month prior to the current month. Member information provided this month indicates that these amounts are owed.
- Amounts listed here will be added to the amount the Local owes to the TD as shown on the final statement.
- Some "dues to collect" amounts will be automatically added to this section as a process of working the eBill. The treasurer can also manually add amounts to this section.
- Only additions that are manually added can be deleted if necessary.
- The member's balance will reflect the additional dues owed to the Local.
- It is the Local's responsibility to make payroll deduction changes or collect payments directly from the member as deemed necessary.

Dues to Return - These are dues that were paid on a bill for a month prior to the current month. Member information provided this month indicates that these amounts are NOT owed.
- Amounts listed here will be returned to the Local from the TD as shown on the final statement.
- Some "dues to returnt" amounts will be automatically added to this section as a process of working the eBill. The treasurer can also manually add amounts to this section.
- Once the eBill is certified, the member's balance will update to reflect these returns.
- It is the Local's responsibility to make payroll deduction changes or issue refund payments to the member as deemed necessary.

Additional Dues - Amounts that appear in this section are anomalies. Contact your membership representative for explanation and/or trouble shooting of these entries.
- A reason must be provided for any amounts that show here. The required reason will be indicated by a red X and then change to a green checkmark once the reason has been entered.

eBill: Final Statement – this section will allow treasurers to view the **pending** final statement. This final statement tab should only be used for informational purposes. Treasurers must wait for their eBill to be certified to process the final statement.
Payment Types: Once finalized, one of two payment types will show at the bottom of the final statement.
- TD Payment to Local – this is money that the TD will process and send to the Local either via ACH or check once the eBill is certified.
- Local Payment to TD – this is money that the Local must send to the TD via check once the eBill is certified. eBill payments must be sent in with the corresponding payment voucher from WinStabs.
  - If money is owed to PAC, treasurers must send a separate check for the PAC amount.

eBill History – allows treasurers to view eBills that have been certified (back to January 2019). Once the eBill has been certified, the final statement and follow up tasks can be processed by the treasurer.
- Billing certification follow up:
  - Final Statement Report – Treasurers will use this information to work the "Process eBill" form in WinStabs.
  - Local/LCA Fund Payment Report –This report provides a breakdown of how the money received via the billing process is to be applied to the funds managed at the Local level. Treasurer will use this information to work the "Process eBill" form in WinStabs.
  - Member Status Report – (Coming Soon) this report provides a listing of all new/re-admitted members for the month as well as those qualifying for exempt (e-49) status for the month.
  - Current Month Variance Report – This is a snap shot of the member variances resulting from this eBill.
  - Follow Up Report – This report provides a listing of the members that were marked as having incorrect payroll deductions along with those with outstanding exceptions.

eBill Summary – This area displays the last seven months of eBills, the submission date, certification date, amount owed to Local, if the payment has been disbursed, amount owed to PAC, amount owed to TD and if those payments were received.

- Months that are highlighted indicate that money is currently owed to TD
- An Asterix (*) indicates that there are notes about the disbursed payment
- Clicking on "View eBill Summary for Year" will provide a complete summary of each year of billing in TD Connect. Notes and details explaining any Asterix (*) are available here. If a payment has been held it is shown here with the reason.
-

Variance –lists the running total variance (positive and negative balances on member accounts) for all members of the Local as of the last certified eBill and any payments/refunds processed onto member records.

- Balances can be sorted into those where the locals owe the members (refunds) and those where the members owe the locals (payments).
- Treasurers must reference this section of TD Connect to generate the monthly meeting report.

Payments/Refunds –shows a listing of all payments directly from members to the Local and refunds that have been processed on member accounts in the eBill system.

Current/Future Dues – shows for each member the billed amount (current dues) and direct receipt (current DR) amount for the current eBill period along with the billed amount for the next two months (next dues/future dues) and the direct receipt amount for the next month (Next DR). The Next DR amount will show as $0.00 until the direct receipt file is received and processed by the TD office. This can take up until the day the eBill is generated.

<div align="center">Carrier Menu</div>

Payroll Deductions – treasurers with members working for UP, KCS, and LACMTA will manage their payroll deductions in this section. (This was TWA in iLINK) Locals not with UP, KCS, or LACMTA will see a blank screen.

Payroll Mass Update – treasurers with members working for UP, KCS, and LACMTA can make updates to all payroll deductions at once in this section. (This was TWA in iLINK) Locals not with UP, KCS ,or LACMTA will see a blank screen.

Direct Receipt History – view Direct Receipt history for any Local member in this section.

Pay Periods - This displays the payroll schedule information for payroll deductions by carrier. If the Direct Receipt file has been uploaded for a specific period a "Y" will be displayed in the Uploaded column. If there are any specific notes about how payroll deductions work for the carrier they are included on the top of the schedule. If the schedule states "Work Period dates for this carrier have been verified and are accurate" the information has been confirmed with the carrier. If the schedule states "Work Period dates for this carrier are estimates and may not be 100% accurate," the schedule has not been verified the carrier to date.

<div align="center">Union Menu</div>

Local Dues Summary – view information about dues rate for any Local in the union.

Officer by Level – search for officers in the union at any level.

Monthly PTD Report – view monthly union financial reports

<u>Reports Menu</u>

You will find local-level reports in this menu.

<u>Member Billed Changes</u> – this is a quick link to the report that shows upcoming changes to members billed amounts due to Dues changes, DIPP, PAC, Group Disability and UTUIA policies.

<u>Member Benefits</u> – this is a series of reports that show members with and without voluntary benefits other than UTUIA.

<u>Voting Eligibility</u> – pull eligibility lists for nominations and elections in this report section. Instructions for using this report are included on the report.

<u>Officer Election/Vacancy -</u>Enter or view election reports.

<u>End of Year</u> – find necessary reports to aide in year-end reporting. Year-end reports report on work that is entered/performed during the year. These reports are locked down once they are generated at the end of the year. If any adjustments are made on eBills once the new year begins, they will not show on these reports. TD Connect will not be available beginning December 31st for a few days into the new year so that the year-end processing can occur. The year-end shut down will be announced as soon as it is known.

This section includes:

- Member dues receipts
- Officers for the year
- Payments/Refunds for the year
- Member variances for the year
- Summary of the eBills processed for the year

<u>Address Changes -</u>View a report of members whose address changed between two dates.

<u>Awards Menu</u>

This is primarily used by Local Chairpersons. Seach/view the outcomes of claims.

Insurance Premiums – United Transportation Union Insurance Agency (UTUIA) – *Revised for 2020

- Members that are actively working will be billed for their UTUIA premiums via the eBill (unless otherwise directed by UTUIA). The UTUIA will receive their premium payments via the eBill whether the member's payroll deductions are in balance or out of balance.

- UTUIA policies are not itemized in the eBill. UTUIA premium amounts listed on the eBill are the sum of premiums the member owes for the month.

- New insurance and changes in premium because of underwriting **will be communicated to the treasurer via the "Member Billed Amount Changes" (MBAC) report available in the Alerts & To Do Items section on the TD Connect home page.**

    o A change in premium that may be owed for previous months will be collected by the IA and will not be on the eBill

    o New premium amounts will become effective on the eBill 45 days from notification.

        • This allows enough time for the treasurer to be alerted of the new amount and make the appropriate updates to the affected members' payroll deductions.

        • The reason for the change will be listed on the MBAC report.

    o Scheduled increases that are part of the natural aging of a policy will become effective on the eBill in accordance with the schedule below.

    o Members that are in applicant status that purchase UTUIA policies will be set up on direct bill. Once the member changes to active status, IA premiums are eligible for eBill. Direct billing will continue until it can become effective on the eBill in accordance with the schedule below.

The following schedule will be used:

Policy Changes Received*	Notification of Policy Changes*	Applied to eBill
*If the 15th of the month falls on a weekend or holiday, the notifications should be made the business day prior. This will also affect the cut off for policy changes received for that month.		
October 16-November 14	November 15	January
November 16-December 14	December 15	February
December 16-January 14	January 15	March
January 16- February 14	February 15	April
February 15- March 14	March 15	May
March 16-April 14	April 15	June
April 16- May 14	May 15	July
May 16 – June 14	June 15	August
June 16-July 14	July 15	September
July 16- August 14	August 15	October
August 16- September 14	September 15	November
September 16- October 14	October 15	December

- Only the amount to be collected for a single or a double of a month's premiums can be on the eBill.
    - There are no "catch-up" payments included on the eBill for amounts owed due to a change in premium or for premiums that were unable to be collected when a policy effective date occurs before it can be included on the eBill.
- Members that remain in Exempt (e-49) status for an extended period of time will be permanently moved to direct bill.
- A double up of a month's premiums can be added to the eBill following a status change from active to exempt (e-49). The following workflow will be used for Locals that are current with the eBill:
    - 1st month the member has moved from Active to Exempt
        - IA will include the premium in the next available eBill per the 45-day notification schedule.
    - 2nd consecutive month the member remains Exempt
        - IA will include the premium in the next available eBill per the 45-day notification schedule.
    - 3rd consecutive month the member remains Exempt
        - IA will check if there is a Direct Receipt payment
        - If there **IS a Direct Receipt** payment:
            - IA will include the premium in the next available eBill per the 45-day notification schedule.
            - Premium stays on the eBill and deduction resumes as the member goes back to work.
        - If there **NO Direct Receipt** payment:
            - Move to Permanent Direct Bill
    - See Examples of this workflow on the next page.

- Double ups will be applied to eBills according to the following thresholds:
    - Rail
        - If the Total Premium is $100 or less
            - The premium can be doubled up with no additional communication to the member
        - If the Total Premium is over $100
            - The IA will contact the member and get approval for the double up
            - IA will email the Treasurer, member and Membership Rep alerting them of the approved double up
    - Bus
        - If the Total Premium is $20 or less
            - The premium can be doubled up with no additional communications
        - If the Total Premium of over $20
            - The IA will contact the member and get approval for the double up
            - IA will email the Treasurer, member and Membership Rep alerting them of the approved double up

UTUIA Double Up Workflow Examples

These examples assume that the eBill is worked on time and that payroll deduction (PRD) changes have been made on time.

Month	Member Status	UTUIA workflow	UTUIA billed amount on eBill	Change Reported on MBAC report by
Member Exempt for 3 consecutive months				
January	Exempt (e-49)	Double-Up for January premium occurs on the April eBill	zero	February 15
February	Exempt (e-49)	Double-Up for February premium occurs on the May eBill	zero	March 15
March	Exempt (e-49)	Double-Up for March premium occurs on the June eBill	zero	April 15
April	Active	Premiums collected on the eBill through PRD	double	
May	Active	Premiums collected on the eBill through PRD	double	
June	Active	Premiums collected on the eBill through PRD	double	
July	Active	Premiums collected on the eBill through PRD	single	May 15

Month	Member Status	UTUIA workflow	UTUIA billed amount on eBill	Change Reported on MBAC report by
Member Exempt for 4 consecutive months				
January	Exempt (e-49)	Double-Up for January premium occurs on the April eBill	zero	February 15
February	Exempt (e-49)	Double-Up for February premium occurs on the May eBill	zero	March 15
March	Exempt (e-49)	Double-Up for March premium occurs on the June eBill	zero	April 15
April	Exempt (e-49)	Premiums moved to direct bill (January double up not collected)	zero	
May	Active	Premiums collected on the eBill through PRD (due to 45-day notification window)	double	
June	Active	Premiums collected on the eBill through PRD (due to 45-day notification window)	double	
July	Active	Premiums moved to direct bill	zero	May 15

Month	Member Status	UTUIA workflow	UTUIA billed amount on eBill	Change Reported on MBAC report by
Member Exempt for 5 consecutive months				
January	Exempt (e-49)	Double-Up for January premium occurs on the April eBill	zero	February 15
February	Exempt (e-49)	Double-Up for February premium occurs on the May eBill	zero	March 15
March	Exempt (e-49)	Double-Up for March premium occurs on the June eBill	zero	April 15
April	Exempt (e-49)	Premiums moved to direct bill (January double up not collected)	zero	
May	Active	Premiums moved to direct bill (February double up not collected)	zero	
June	Active	Premiums collected on the eBill through PRD (due to 45-day notification window)	double	
July	Active	Premiums moved to direct bill	zero	May 15

Seniority Maintenance Fee and Manager Member Type Rules

Local Treasurers can convert a Regular member to any of the following SMF member types on the effective eBill. To convert anyone from a SMF member type to a Regular member type, a re-admission application must be sent to the Local's Membership Representative team so that the TD Office can update the member's record.

SMF – Manager or Manager – Dues Requirement

Description: The individual is serving in an official capacity with the carrier, and they **are required** to pay one of the below scenarios per the agreement to maintain seniority in the craft represented by SMART-TD. Managers are not "members in good standing" because they are not employed in a craft represented by SMART TD. **Individuals are not permitted to voluntarily pay any dues that are not required under the CBA or by the GCA.**

Rules	Required Dues Scenario				
	1	**2**	**3a**	**3b**	**4**
	TD/SLB/GCA/ LCA & Local required	**TD/SLB/Local Dues** required	**Other combo of dues that at least includes TD/SLB/Local dues** at regular rate required	**Other combo of dues that DOES NOT at least include TD/SLB/Local dues** at regular rate required	**Other fee rate** required for SMF
Member in good standing	No	No	No	No	No
VSTD	Paid or cancelled	Paid or cancelled	Paid or cancelled	Cancelled	Cancelled
VLTD	Paid via eBill	Paid via eBill	Paid via eBill	Cancelled or DB	Cancelled or DB
DIPP	Cancelled	Cancelled	Cancelled	Cancelled	Cancelled
UTUIA	Paid via eBill or DB	Paid via eBill or DB	Paid via eBill or DB	DB	DB
PAC	Paid via eBill	Paid via eBill	Paid via eBill	Cancelled	Cancelled
Attend business portion of Local meetings	No	No	No	No	No
Attend non-business portion of Local meetings/social functions	Yes	Yes	Yes	Yes	Yes
Run for or hold office	No	No	No	No	No
Nominate others for office	No	No	No	No	No
Vote elections	No	No	No	No	No
Vote National contract	No	No	No	No	No
Receive TD News	No	No	No	No	No
Access SMART TD Website or SMART U	No	No	No	No	No
Receive member card	No	No	No	No	No

SMF – Manager or Manager – No Dues Requirement

Description: The individual is serving in an official capacity with the carrier. They **are not required** to pay dues to maintain their seniority in the craft represented by SMART-TD, but the individual voluntarily elects to continue paying dues. This will either be a Dues Scenario 1 or 2 as determined by the GCA, and the rules set is the same as those described above. **Individuals are not permitted to voluntarily pay dues in excess of the established billed amount.**

SMF – BLET

Description: The individual has moved their membership to another labor organization and is required to pay a fee to maintain their seniority in the craft that SMART TD holds the contract for. **Individuals are not permitted to voluntarily pay any dues that are not required under the CBA.**

Rules	Required Dues Scenario				
	1	**2**	**3a**	**3b**	**4**
	TD/SLB/GCA/ LCA & Local required	**TD/SLB/Local Dues** required	**Other combo of dues that at least includes TD/SLB/Local dues** at regular rate required	**Other combo of dues that DOES NOT at least include TD/SLB/Local dues** at regular rate required	**Other fee rate** required for SMF
Member in good standing	Yes	Yes	Yes	No	No
VSTD	Paid or cancelled	Paid or cancelled	Paid or cancelled	Cancelled	Cancelled
VLTD	Paid via eBill	Paid via eBill	Paid via eBill	Cancelled or DB	Cancelled or DB
DIPP	Paid or cancelled	Paid or cancelled	Paid or cancelled	Cancelled	Cancelled
UTUIA	Paid via eBill or DB	Paid via eBill or DB	Paid via eBill or DB	DB	DB
PAC	Paid via eBill	Paid via eBill	Paid via eBill	Cancelled	Cancelled
Attend business portion of Local meetings	Yes	Yes – cannot vote LCA motions	Yes – cannot vote LCA motions	No	No
Attend non-business portion of Local meetings/social functions	Yes	Yes	Yes	Yes	Yes
Run for or hold office	No	No	No	No	No
Nominate others for office	Yes	Yes	Yes	No	No
Vote elections	Yes	Yes	Yes	No	No
Vote National contract	Yes	Yes	Yes	No	No
Receive TD News	Yes	Yes	Yes	No	No
Access SMART TD Website or SMART U	Yes-upon request	Yes-upon request	Yes-upon request	No	No
Receive member card	Yes	Yes	Yes	No	No

Dual Membership

Description: The individual opts to be a dual member of both TD and BLET. The individual must pay all 5-parts of dues. There is no mechanism to track dual membership in TD Connect. In these cases, the person is still listed as a Regular Member Type in TD Connect. Dual members cannot run for or hold office except when a member is forced by agreement to belong to the BLET. Although there is not requirement for individuals to notify TD or the Local of their dual membership, Local Secretaries must be aware of known dual members and mark them in-eligible on election rosters. The rules set for these individuals is the same as scenario 1 above.

SMF – Craft/Jurisdiction

Description: The individual is working in a craft not represented by SMART TD and is required to pay a fee to maintain their seniority in the craft that SMART TD holds the contract for. These individuals are not "members in good standing" because they are not employed in a craft represented by SMART TD. **Individuals are not permitted to voluntarily pay any dues that are not required under the CBA.**

Rules	Required Dues Scenario				
	1	**2**	**3a**	**3b**	**4**
	TD/SLB/GCA/ LCA & Local required	**TD/SLB/Local Dues** required	**Other combo of dues that at least includes TD/SLB/Local dues** at regular rate required	**Other combo of dues that DOES NOT at least include TD/SLB/Local dues** at regular rate required	**Other fee rate** required for SMF
Member in good standing	No	No	No	No	No
VSTD	Paid or cancelled	Paid or cancelled	Paid or cancelled	Cancelled	Cancelled
VLTD	Paid via eBill	Paid via eBill	Paid via eBill	Cancelled or DB	Cancelled or DB
DIPP	Cancelled	Cancelled	Cancelled	Cancelled	Cancelled
UTUIA	Paid via eBill or DB	Paid via eBill or DB	Paid via eBill or DB	DB	DB
PAC	Paid via eBill	Paid via eBill	Paid via eBill	Cancelled	Cancelled
Attend business portion of Local meetings	No	No	No	No	No
Attend non-business portion of Local meetings/social functions	Yes	Yes	Yes	Yes	Yes
Run for or hold office	No	No	No	No	No
Nominate others for office	No	No	No	No	No
Vote elections	No	No	No	No	No
Vote National contract	No	No	No	No	No
Receive TD News	No	No	No	No	No
Access SMART TD Website or SMART U	No	No	No	No	No
Receive member card	No	No	No	No	No

Regular Member - Craft/Jurisdiction Additional Dues Override

Description: There are instances where a member is working in a craft represented by one GCA/LCA/Local and they are required to pay seniority maintenance fees to a second GCA/LCA/Local to maintain seniority in the craft under that entity's jurisdiction. In these cases, the person is still listed as a Regular Member Type in TD Connect and a dues "exception" is added to the member's record to account for the additional dues money required. The person is entitled to all benefits and privileges available to regular members. In most cases, these instances involve someone who is or has worked as a yardmaster or that holds a union officer position exempt from transfer.

SMF – Craft/Jurisdiction – No Dues Requirement

Description: The individual is working in a craft no represented by SMART TD. They **are not required** to pay dues to maintain their seniority in the craft represented by SMART-TD, but the individual voluntarily elects to continue paying dues. This will either be a Dues Scenario 1 or 2 as determined by the GCA, and the rules set is the same as those described above. **Individuals are not permitted to voluntarily pay dues in excess of the established billed amount.**