A Treasurer's Guide to iLink

Prepared by

SMART TRANSPORTATION DIVISION
About iLINK

➢ iLINK is the SMART Transportation Division’s principal web application. It is a custom-built program that supports the membership, as well as many business processes at the SMART TD office.

➢ Access to iLINK is controlled through built-in security based on your membership status and the user’s login privileges.

➢ iLINK is accessible from any location that has an internet connection, and Microsoft Internet Explorer 7.0 or higher is recommended.

Want access to iLINK?

➢ Interested in accessing the power of iLINK? Get in touch with us to create your user account.

➢ Currently, iLINK is only offered to officers of the SMART Transportation Division.

➢ On the SMART Transportation Division Official website (make sure you are under the “Transportation” tab), on the right side of the screen find the blue iLINK button. Once on that page, click the iLINK logo above, and go to the “Contact Us” page, then click the “New User Info” link and complete the form to apply.

Looking for iLINK assistance?

Contact the Information Services Dept. at (216) 228-9400, Ext. 3908
When a Local Treasurer logs in to iLINK, they will be directed to the iLINK Dashboard. Next to the ILINK logo is the blue menu bar used to access the features provided in iLINK. The left part of the Dashboard includes SMART Transportation Division updates and links to SMART TD Resources. The right side of the Dashboard offers a snapshot of the Local’s status. Underlined items are clickable and connect to additional information. This guide will walk you through these features and their submenus.
Alerts

Local Billing Status displays if the Local’s Billings are current, or, how many months they are behind. “0” means they are either current or not due yet.

Supply Invoice Balance is the Local’s list of charges for any supplies purchased from the SMART TD Office. Supply balances can be paid when working Step 4 of the monthly billing process. They can also be paid as an extra disbursement to SMART TD. (See Page 93 of the WinStabs Manual). Always pay off the balance each month.

DR Spreads

This is a snapshot of when the SMART TD receives monies from the carrier. It lists the Carrier (or Employer) name by abbreviation, the Most Recent DR Spreadsheet, the Deposit Date of the monies, and the Amount of the deposit received.
**Need Local Assistance?**

Treasurers may use this button to request help directly from the Field Audit & Support.

All officers **must** open iLINK through Internet Explorer to use this feature.

*Fill out:*

- Local Number
- Description of issue and any prior steps taken toward resolution
- Person requesting or to connect with about the issue and their contact information

Ensure all areas are complete
The following instructions will guide a Treasurer through the steps to change the password for their login account in the Treasurer’s Web Application.

Click on the Change Password link in the iLINK Header.

You will be navigated to the Change Password page.

Enter the current password in the Old Password field.

Enter the new password in the New Password field.

Verify the new password by re-typing it in the second New Password field.

Click the Change Password button.

You’ll receive the message Save Successful.
Under this menu are links to member related tools. This guide will review **Member Search**, **Reports**, and **Awards**.

**Member Search** allows the Treasurer to search the entire list of members in their Local, with as little as one specific criteria, to help them locate a member.

The Treasurer can fill in one, several, or all of the criteria listed to find one member, or several members with same result.

**Advanced search** brings up more fields, such as address, employee number, and birthday; allowing the Treasurer to narrow down the search results even more.
A member search will yield one or more member results based on the input information. When the Treasurer selects a member, it will take them to the Member Details page. Here they can find the members personal and contact information, as well as browse through the tabs in the middle of the page to see their history of Officer Positions held, a breakdown of the dues they pay, and insurance policies they carry. The Print View at the top right corner will display the most relevant information in an easy to print format.

The Member Details page allows two ways to update Member Records. For a Treasurer to submit new or updated phone numbers and email addresses for that member to SMART TD, use the Edit Contact Info button in the mid-right section of the page. Navigate to Submit New Address on the bottom right of the page to submit an updated mailing address to SMART TD.

If a Local Member wishes to request membership in the Discipline Income Protection Program or contribute to the UTU Political Action Committee, the forms are available on this same page. Navigate to the very bottom left corner of this page and use the drop-down box to choose either DIPP Form or PAC Form. The document will pop up in a separate window with the selected member’s information already partially filled out. The rest may be filled out in the web browser and printed to mail, or it may be printed and filled out by hand prior to mailing in.
**Reports** takes a Treasurer to a page presenting several reports which can be utilized to view Member Data summarized under different search criteria.

- **Member Search**
  Main Search page to query the database to attain member data

- **Search SMART-TD Database**
  Search through All SMART-TD Members

- **Reports**
  More reports for iLINK users

- **Awards**
  SSR Index of Awards conferring PLB, SBA, ARB and 1st Divisions

- **WebSite**
  Create and Maintain a website for your organization

- **Member Resources**
  Member Resources

The **Dues Summary Report** displays the breakdown of dues amounts for each of the Local’s five part dues.

<table>
<thead>
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<th>Dues Summary Report</th>
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<tbody>
<tr>
<td>Period: November-2017</td>
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<tr>
<td>Local: 0013</td>
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<table>
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<tr>
<th>Print View</th>
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<tr>
<td>Local: 0013 State: SOUTH DAKOTA</td>
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<table>
<thead>
<tr>
<th>International</th>
<th>Legislative</th>
<th>Local</th>
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<tbody>
<tr>
<td>Regular</td>
<td>$30.50</td>
<td>$10.00</td>
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<tr>
<td>Objector</td>
<td>$22.88</td>
<td>$0.00</td>
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<table>
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<tr>
<th>GCA Dues</th>
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<td>G013</td>
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<table>
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<tr>
<th>Dues By LCA</th>
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<tr>
<td>LCA</td>
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<td>015A</td>
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| 015B | $54.50 | $14.50 | $0.00 | $0.00 | $0.00 |
Member Roster Report allows a Treasurer to view/print their entire roster of members as reported to SMART TD.

The Treasurer must choose the status of the members they are looking to filter. The results can be displayed in a regular screen format or as a Mailing Label when doing to mass mailing to members.

This report can be emailed, downloaded to a PC, or choose print view to display a cleaner format for printing. This report may be used in events such as reconciling the Local members with WinStabs or pulling a voting list for elections.

Another handy tool is the New Member Report. It allows for a search during a specific time period for New Members or New Insurance/DIPP Members in the Local.
The **Treasurer’s Web Application** was created to give Locals working with certain carriers (UP, KCS, ST, LACMTA) a way to maintain their Payroll Dues Deductions (for guidance, refer to the TWA User’s Manual). All users on Direct Receipts were given TWA access to utilize some of its features such as submitting address changes and uploading WinStabs Data.

The **Member** tab offers two different ways to search the iLINK Database.

### Search Local Membership
- **Search Local Membership**
  - This link will allow Treasurers to search for members by Name, GCA, and SSN; view and modify a Member’s home address.

### Search SMART-TD Database
- **Search SMART-TD Database**
  - This link will allow Treasurers to search the entire SMART-TD database to locate specific members. The results of the search will give the member's existing local and current Treasurer's contact information on file.

Once results are yielded, click on the blue fields in either the **Edit Address** or **Edit Contact Info** to display a page in which changes for these items may be submitted.

### Search SMART-TD Database
- **Search SMART-TD Database**
  - This link will allow Treasurers to search the entire SMART-TD database to locate specific members. The results of the search will give the member's existing local and current Treasurer's contact information on file.

Treasurers can fill in any combination of information to bring up Member results. Again, there are select boxes with asterisks for Wildcard Searches.

The results displayed will show the Member’s basic information as well as their Treasurer. This is helpful when working transfers.
TWA Reports

TWA

Member

Reports

WinStubs
Download latest version of WinStubs apps, Download Member, Insurance, and Treasurer information.

Help
Help Documents for TWA

Treasurers can go to the Carrier Payroll Deduction Report to view the dues and insurance deductions from the Employer’s payroll by monthly pay period. A drop down box will allow the Treasurer to choose their employer.

TWA Deduction Report
This report lists all deductions contained within the TWA database. Users can view, print, and download data.

Carrier Payroll Deduction Report
This report will allow you to view the actual payroll deductions received from the Carrier by pay period.

DR Spreads
This report will allow you to view how the payroll deductions received from the Carrier are divided amongst the various SMART TD funds (such as UTUIA, SLB, and GCA funds). Also displayed are the monies paid back to the Local from SMART TD via direct deposit or check. Two drop down boxes will allow a Treasurer to choose an Employer and Billing Month.

Monthly PA1 Adjustments
This monthly report is available after a billing is audited in Cleveland. The PA1 report itemizes reconciliations from the audited billing either being owed by or due to the local. This detail will balance to the amounts either added or subtracted to the monthly local surplus payment.

Monthly Audited Billing Totals
This report will show the final audited totals applied to your monthly billing.

Transfer Report
This report will allow you to view Completed Transfers between locals, so T-Bill Information can be updated.

Filter Direct Pay History
This report will allow you to Filter Direct Pay History.

GD Opt Out Report

The Monthly Audited Billing Totals report itemizes final amounts owed and what has been paid as determined by the SMART TD Billing Auditor.

Filter Direct Pay History allows a Treasurer to search for and view a member’s entire direct pay history.

The GD Opt Out Report displays members that have cancelled their Group Disability Plans during a selected time period.
Use the **WinStabs** tab to download the newest version of WinStabs.

The top portion of the **WinStabs** page gives step by step instructions for downloading the updated WinStabs Software.

The lower portion of the **WinStabs** page provides the tool where a Treasurer can upload a backup of their WinStabs data to the SMART TD Office.

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**TWA Help**

The **Help** section at the bottom of the TWA Menu links to:

- [Direct Deposit Authorization Form](#)
- [Download and Install a New Version of WinStabs](#)
- [SMART_TD_TWA_UserManual_Jan2017](#)
- [Start New Year 2017 for WinStabs](#)

The **Direct Deposit Form** can be used when authorizing the direct deposit of Local Funds.

**TWA User Manual** is a full manual to using the Treasurer’s Web Application.

The step-by-step WinStabs Instructions are under [Download and Install a New Version of WinStabs](#) and is updated with every new version.

**Start the New Year for WinStabs** will help treasurer’s backup and carry over their WinStabs information when in the process of updating to the new WinStabs version.
Key Points of Contact

For iLINK and TWA Support contact:

Dora Wolf
SMART-TD Updating Supervisor
dwolf@smart-union.org
216-227-5437

For help backing up WinStabs data to iLINK contact:

Wade Arnold
SMART-TD PC Technician
warnold@smart-union.org
216-227-5204