



Payroll Deduction Changes on TD Connect

This guide will walk you through:

- When to make payroll deduction changes
- Knowing that a payroll deduction needs to be changed
- When to make a one-time pay period deduction
- What to think about when a payroll deduction change needs to be made.
- Making permanent changes to carrier payroll deductions on TD Connect
- Making one-time pay period deductions on TD Connect

What are carrier payroll/payroll deductions on TD Connect and who uses them?

Carrier payroll/payroll deductions are used by treasurers to update the dues deductions directly from the member's paycheck. Treasurers will make payroll deduction changes any time the amount expected to be received and the payroll deduction amount are not the same.

Examples include when:

- A new membership becomes effective
- Any portion of the 5-part dues is changed (or there's an assessment)
- A member files a waiver of coverage to opt out of short-term disability
- A member adds or changes a DIPP enrollment
- A member adds or changes a recurring SMART TD PAC pledge
- A member opts in or makes changes to a long-term disability plan
- You are notified of a change to an insurance policy
- A member is behind on any portion of what is owed (i.e. a payment plan)

Currently, carrier payroll deductions and carrier payroll mass update is only used for members employed by UP, KCS, and LACMTA.

For members employed by all other carriers/companies, treasurers must use the carrier/company's system or process for updating payroll deductions.

There are two ways to access payroll deductions in TD Connect. The first is through the Carrier menu in TD Connect. The second is through the Members menu in TD Connect. This guide will explain both ways.

When treasurers log in to TD Connect it is a good habit to check the **Member Billed Amount Changes** report to stay on top of any payroll deductions that need to be made. The following steps are how to review this report.

Step 1:

Click on **Member Billed Amount Changes** under Alerts & To Do items.

The screenshot shows the TD Connect Local Management interface. The user is logged in as John Doe (Local: 9999). The navigation menu includes Home, Members, Dues, Carrier, Union, and Reports. The 'Alerts & To Do Items' section is circled in red and contains a table with the following items:

Item	Count
Process eBill	JUNE 2019 NOT AVAILABLE
Member Billed Amount Changes	
Accept Transfers	0
Pending Transfers	0
Missing Applications	0
Missing Addresses	0
Missing Authorizations	0

The 'Messages & Reminders' section contains a message about submitting local reports to the TD office. A notification bar at the bottom states: **For Your Review: Local & LCA Dues**.

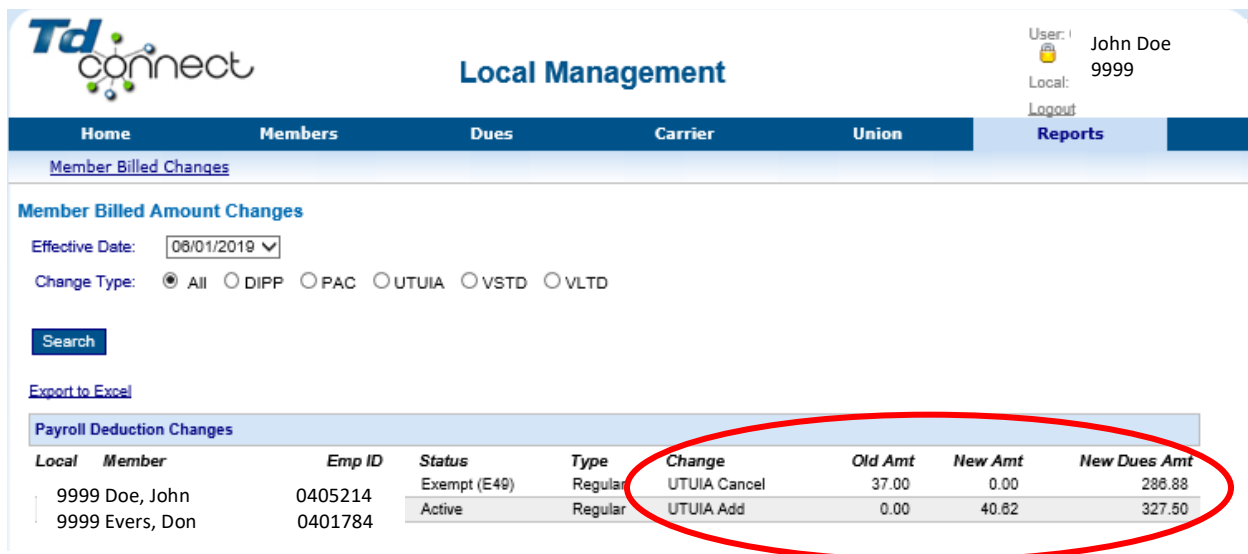
Step 2:

Choose a billing date in the Effective Date dropdown and click **Search**.

The screenshot shows the 'Member Billed Amount Changes' report page. The 'Effective Date' dropdown menu is circled in red, showing '06/01/2019' selected and '07/01/2019' as an option. The 'Change Type' section includes radio buttons for PAC, UTUIA, VSTD, and VLTD. The 'Search' button is also circled in red.

Step 3:

If there are any changes to be made, you will see them here. These members will pull up every time you select this date. You'll have to keep track of the changes you make separately as they will not clear out from the list after you update the payroll deduction. Notice the reason for "Change," "Old Amount," "New Amount" and "New Dues Amount." The new dues amount will be the new amount that you will change the payroll deductions to.



The screenshot shows the Tdconnect Local Management interface. At the top, there is a navigation bar with tabs for Home, Members, Dues, Carrier, Union, and Reports. The Reports tab is selected. Below the navigation bar, there is a section for "Member Billed Amount Changes" with an "Effective Date" dropdown set to 06/01/2019 and radio buttons for "Change Type" (All, DIPP, PAC, UTUIA, VSTD, VLTD). A "Search" button is present. Below this is a table titled "Payroll Deduction Changes" with columns: Local, Member, Emp ID, Status, Type, Change, Old Amt, New Amt, and New Dues Amt. The table contains two rows of data. The second row is circled in red.

Local	Member	Emp ID	Status	Type	Change	Old Amt	New Amt	New Dues Amt
9999	Doe, John	0405214	Exempt (E49)	Regular	UTUIA Cancel	37.00	0.00	286.88
9999	Evers, Don	0401784	Active	Regular	UTUIA Add	0.00	40.62	327.50

Once you get these new amounts, use the guide on the following pages for how to make the payroll deduction changes.

Note: Treasurers **must focus** on when payroll changes need to be made. Being vigilant and staying up to date on any payroll deduction changes makes the job much easier.

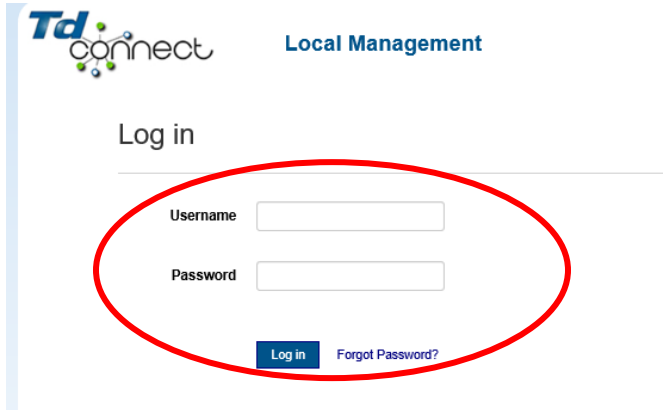
When making payroll deduction changes, always keep in mind that dues are paid in advance. Dues taken out of the 1st working period in December or check paid at the end of December will pay for January dues (called a first-half deduction or first payroll period). Dues taken out of the last working period of December or check paid in the beginning of January will pay for February dues (called a last-half deduction or second payroll period).

Most locals will have either first-half or last-half deductions, but some locals will have dues taken out of both payroll periods.

The following steps will be used when updating payroll deductions via the Carrier > Payroll Deductions function of TD Connect.

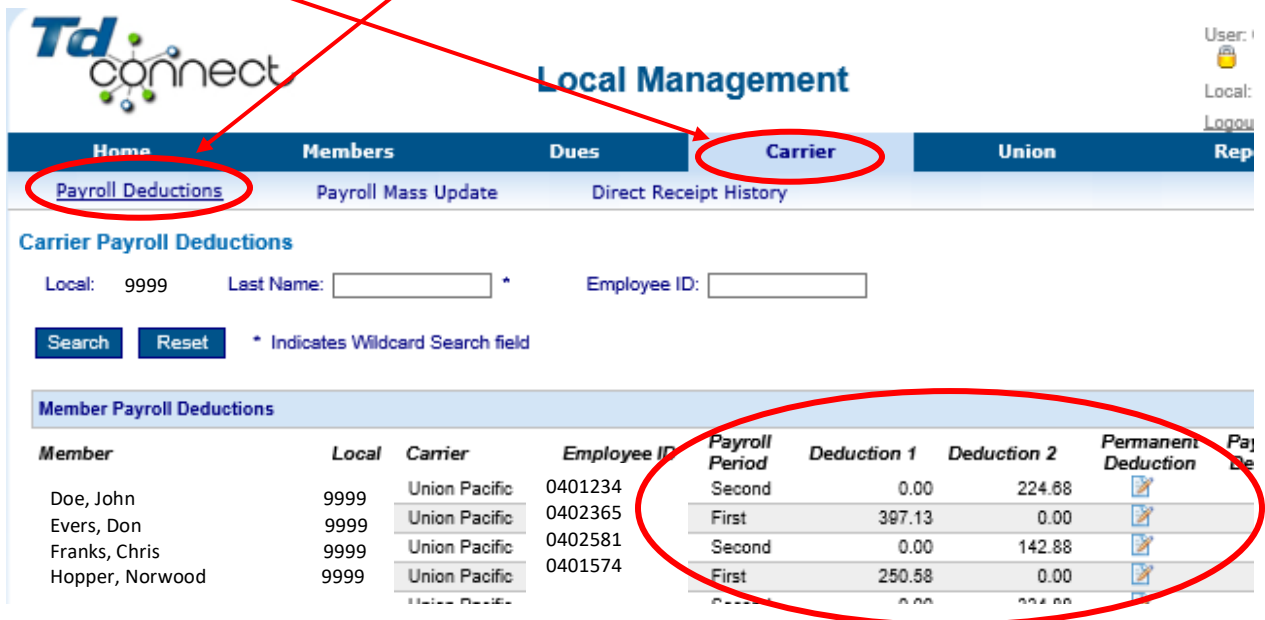
Step 1:

Log in to TD Connect using the login credentials supplied to you.



Step 2.

Click on **Carrier > Payroll Deductions**.



Note: On this screen, a treasurer can see what pay period a member's dues are being deducted. If a member has a second payroll period deduction, then the dues amount will show under Deduction 2. If the deduction is a first payroll period, then the dues amount will show under Deduction 1. This is helpful so that a treasurer will know which pay period to adjust.

Step 3:

Type in the last name of the member that you want to adjust payroll for and click **Search**.

The screenshot shows the TD Connect Local Management interface. The user is logged in as John Doe (9999). The navigation menu includes Home, Members, Dues, Carrier, Union, and Reports. Under the Members menu, there are links for Payroll Deductions, Payroll Mass Update, and Direct Receipt History. The Carrier Payroll Deductions section is active, showing a search form with fields for Local (9999), Last Name (doe, john), and Employee ID. A Search button is highlighted. Below the search form is a table of Member Payroll Deductions for John Doe.

Member	Local	Carrier	Employee ID	Payroll Period	Deduction 1	Deduction 2	Permanent Deduction	Pay Period Deduction
Doe, John	9999	Union Pacific	046789	Both	183.00	223.38		

Note: This member has dues deducted from both pay periods. The treasurer will need to add the two amounts together to be sure that the total amount for the month is correct.

The following steps will be used when updating payroll deductions via the **Members > Local Members > Carrier Payroll** function of TD Connect.

Step 1.

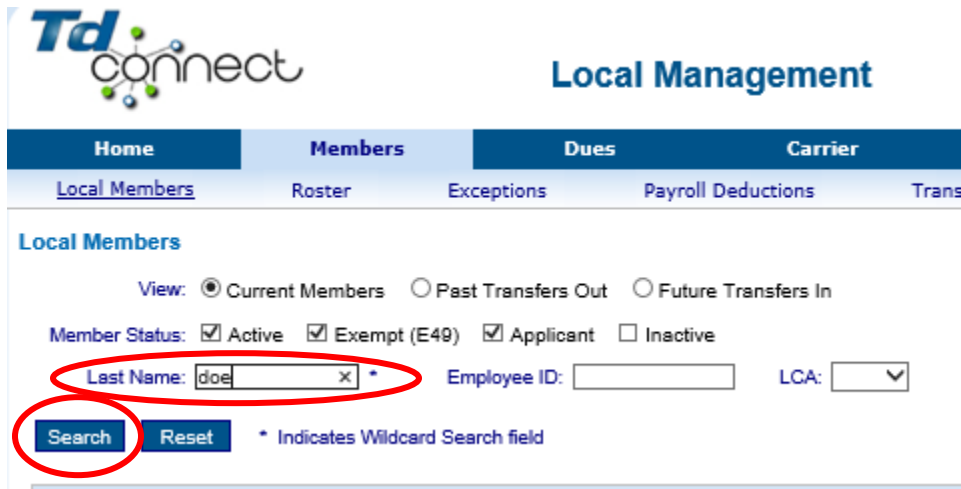
Click on **Members>Local Members**.

The screenshot shows the TD Connect Local Management interface. The user is logged in as John Doe (9999). The navigation menu includes Home, Members, Dues, and Carrier. Under the Members menu, there are links for Local Members, Roster, Exceptions, Payroll Deductions, and Transfers. The Local Members section is active, showing a search form with fields for Last Name, Employee ID, and LCA. A Search button is highlighted. Below the search form is a table of Member List for Joe Doe.

Member	Member #	Local	LCA	Status
Doe, Joe	TD0401234	9999	509	Active

Step 2:

Type in the member's last name and click **Search**.



Td connect Local Management

Home Members Dues Carrier

Local Members Roster Exceptions Payroll Deductions Trans

Local Members

View: Current Members Past Transfers Out Future Transfers In

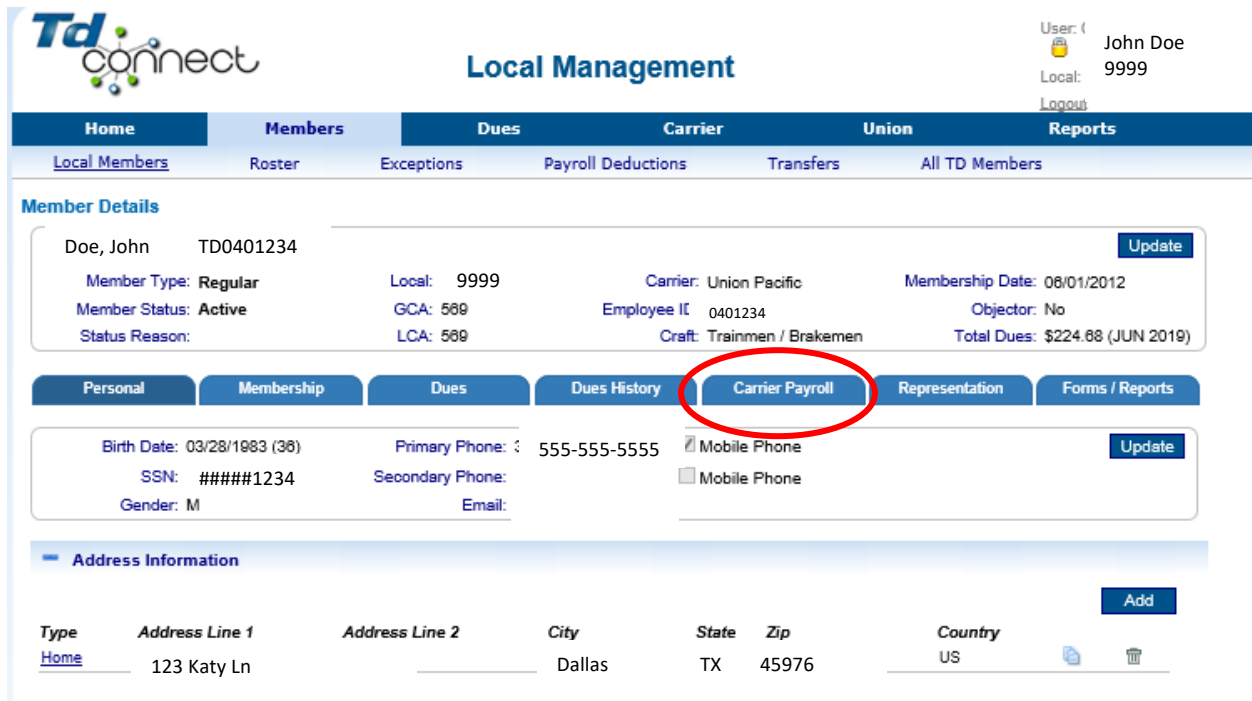
Member Status: Active Exempt (E49) Applicant Inactive

Last Name: * Employee ID: LCA:

Search **Reset** * Indicates Wildcard Search field

Step 3:

Once in the member's record, click on the **Carrier Payroll** tab.



Td connect Local Management

User: (John Doe
Local: 9999
Logout

Home Members Dues Carrier Union Reports

Local Members Roster Exceptions Payroll Deductions Transfers All TD Members

Member Details

Doe, John TD0401234 **Update**

Member Type: Regular Local: 9999 Carrier: Union Pacific Membership Date: 08/01/2012
Member Status: Active GCA: 589 Employee ID: 0401234 Objector: No
Status Reason: LCA: 589 Craft: Trainmen / Brakemen Total Dues: \$224.68 (JUN 2019)

Personal Membership Dues Dues History **Carrier Payroll** Representation Forms / Reports

Birth Date: 03/28/1983 (36) Primary Phone: 555-555-5555 Mobile Phone **Update**
SSN: #####1234 Secondary Phone: Mobile Phone
Gender: M Email:

Address Information **Add**

Type	Address Line 1	Address Line 2	City	State	Zip	Country
Home	123 Katy Ln		Dallas	TX	45976	US

To adjust a permanent deduction, click on the paper/pencil icon under permanent deduction.

Td connect Local Management

User: John Doe
Local: 9999
Logout

Home Members Dues **Carrier** Union Reports

Payroll Deductions Payroll Mass Update Direct Receipt History

Carrier Payroll Deductions

Local: 9999 Last Name: [doe, john] Employee ID: []

Search Reset * Indicates Wildcard Search field

Member	Local	Carrier	Employee ID	Payroll Period	Deduction 1	Deduction 2	Permanent Deduction	Pay Period Deduction
Doe, John	9999	Union Pacific	046789	Both	183.00	223.38		

Above is the view when using the **Carrier > Payroll Deductions** function of TD Connect.

Member Details

DOE, JOHN [Update](#)

Member Type: Regular Local: 9999 Carrier: Union Pacific Membership Date: 06/01/2012
 Member Status: Active GCA: 569 Employee ID: 046789 Objector: No
 Status Reason: LCA: 569 Craft: Trainmen / Brakemen Total Dues: \$224.68 (JUN 2019)

Personal Membership Dues Dues History **Carrier Payroll** Representation Forms / Reports

Permanent Deduction

Local	Carrier	Payroll Period	Deduction 1	Deduction 2	Active	Update
9999	Union Pacific	Second	\$0.00	\$224.68	Yes	

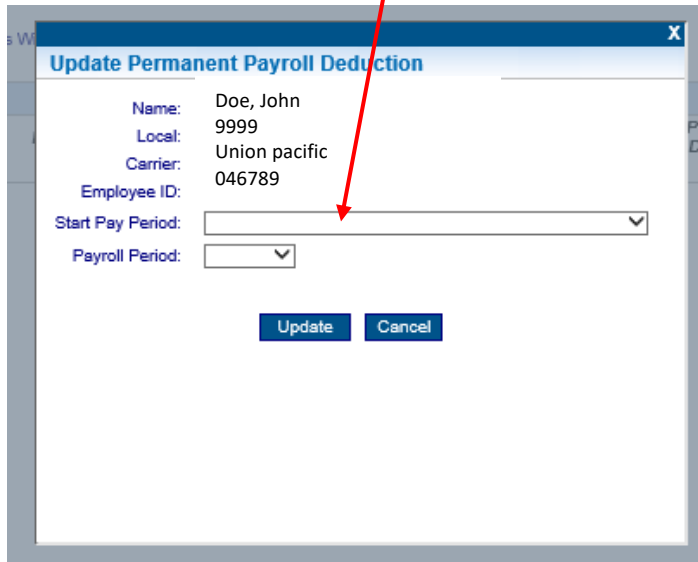
One Time Deduction

Local	Carrier	Pay Month	Payroll Period	Cutoff Date	Billing Date	Deduction Amount	Update
9999	Union Pacific	05/01/2019	2nd Period	05/29/2019	07/01/2019	\$224.68	
9999	Union Pacific	05/01/2019	1st Period	05/14/2019	06/01/2019	\$0.00	
9999	Union Pacific	04/01/2019	2nd Period	04/28/2019	06/01/2019	\$224.68	
9999	Union Pacific	04/01/2019	1st Period	04/14/2019	05/01/2019	\$0.00	
9999	Union Pacific	03/01/2019	2nd Period	03/27/2019	05/01/2019	\$224.68	

Above is the view when using the **Members > Local Members > Carrier Payroll** function of TD Connect

Step 1:

From the Start Pay Period dropbox, select the payroll period with which you wish to begin the new deduction amount(s).



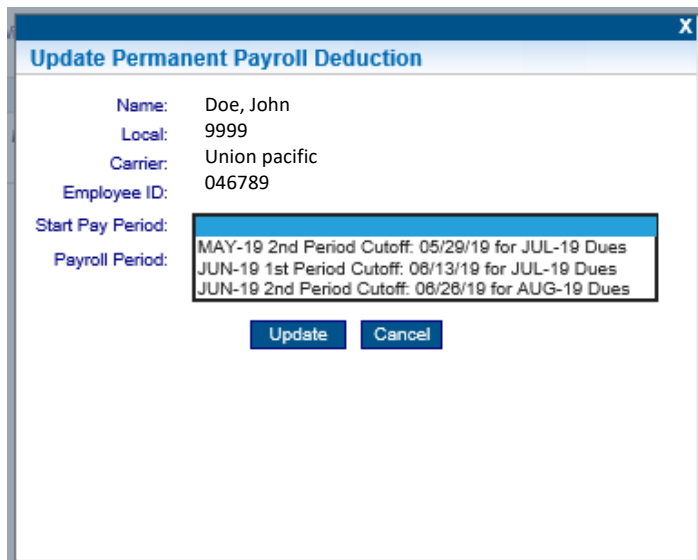
Update Permanent Payroll Deduction

Name: Doe, John
Local: 9999
Carrier: Union pacific
Employee ID: 046789

Start Pay Period:

Payroll Period:

Pay attention to timing the deduction and how it will be applied. (**Note:** In the drop down below, the May-19 2nd period payroll has a payroll change cutoff date of May 29th and is for July-19 dues.)



Update Permanent Payroll Deduction

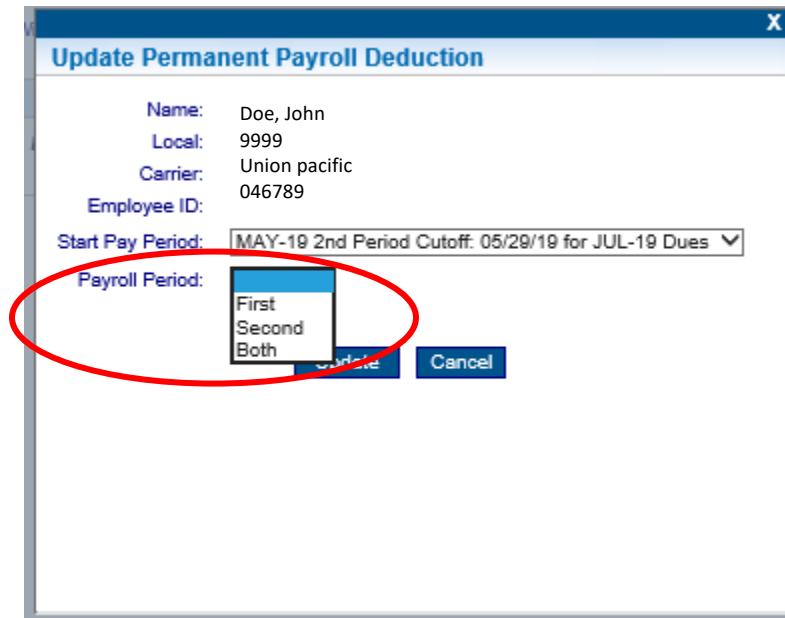
Name: Doe, John
Local: 9999
Carrier: Union pacific
Employee ID: 046789

Start Pay Period:

Payroll Period:

Step 2:

From the Payroll Period dropbox, select the payroll periods to apply the change to. Selecting **First** will update any first period deduction and zero out any second period deduction. Selecting **Second** will update any second period deduction and zero out any first period deduction. Selecting **Both** will allow you to enter a new amount on both payroll periods. Keep in mind if a member has dues coming out of both payroll periods and you wish to retain amounts coming from both periods, you must select **Both**.



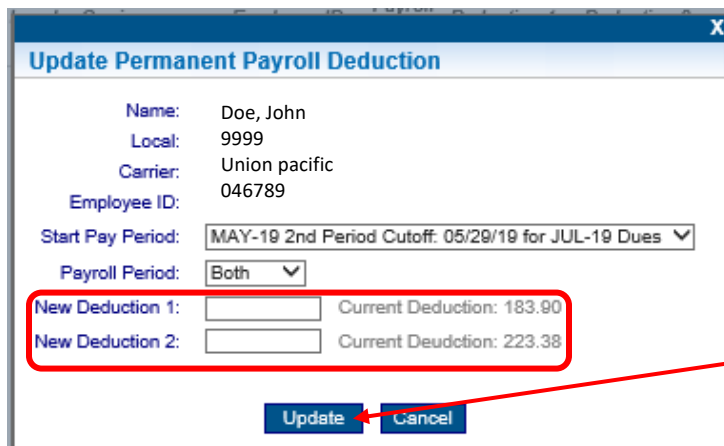
Update Permanent Payroll Deduction

Name: Doe, John
Local: 9999
Carrier: Union pacific
Employee ID: 046789
Start Pay Period: MAY-19 2nd Period Cutoff: 05/29/19 for JUL-19 Dues
Payroll Period: **Both**

Update Cancel

Step 3:

Enter amounts in the New Deduction boxes. Then click **Update**.



Update Permanent Payroll Deduction

Name: Doe, John
Local: 9999
Carrier: Union pacific
Employee ID: 046789
Start Pay Period: MAY-19 2nd Period Cutoff: 05/29/19 for JUL-19 Dues
Payroll Period: Both
New Deduction 1: Current Deduction: 183.90
New Deduction 2: Current Deudction: 223.38

Update Cancel

Note: The current deduction amount shows next to the New Deduction box. The treasurer will use this information to be sure that dues are coming out on the correct pay periods. Treasurers can also use these amounts to help determine the new amounts.

To make a one-time deduction change, click on the paper/pencil icon under One Time Deduction in the Members > Local Members > Carrier Payroll function of TD Connect Or under Pay Period Deduction in the Carrier > Payroll Deductions function of TD Connect.

Local Management

User: John Doe
Local: 9999
Logout

Home Members Dues **Carrier** Union Reports

Payroll Deductions Payroll Mass Update Direct Receipt History

Carrier Payroll Deductions

Local: 9999 Last Name: [doe, john] * Employee ID: []

Search Reset * Indicates Wildcard Search field

Member Payroll Deductions

Member	Local	Carrier	Employee ID	Payroll Period	Deduction 1	Deduction 2	Permanent Deduction	Pay Period Deduction
Doe, John	9999	Union Pacific	046789	Both	183.90	223.38	[]	[]

Above is the view when using the Carrier > Payroll Deductions function of TD Connect.

Member Details

Doe, John TD0401234 [Update]

Member Type: Regular Local: 9999 Carrier: Union Pacific Membership Date: 08/01/2012
Member Status: Active GCA: 589 Employee ID: 0401234 Object: No
Status Reason: LCA: 589 Craft: Trainmen / Brakemen Total Dues: \$224.68 (JUN 2019)

Personal Membership Dues Dues History Carrier Payroll Representation Forms / Reports

Permanant Deduction

Local	Carrier	Payroll Period	Deduction 1	Deduction 2	Active	Update
9999	Union Pacific	Second	\$0.00	\$224.68	Yes	[]

One Time Deduction

Local	Carrier	Pay Month	Payroll Period	Cutoff Date	Billing Date	Deduction Amount	Update
9999	Union Pacific	05/01/2019	2nd Period	05/29/2019	07/01/2019	\$224.68	[]
9999	Union Pacific	05/01/2019	1st Period	05/14/2019	06/01/2019	\$0.00	[]
9999	Union Pacific	04/01/2019	2nd Period	04/26/2019	06/01/2019	\$224.68	[]
9999	Union Pacific	04/01/2019	1st Period	04/14/2019	05/01/2019	\$0.00	[]
9999	Union Pacific	03/01/2019	2nd Period	03/27/2019	05/01/2019	\$224.68	[]

Above is the view when using the Members > Local Members > Carrier Payroll function of TD Connect

One Time/Pay Period Deduction changes can be used when you are short or over on your billing and have a variance. This change will be for one pay period only.

This will not permanently change deductions.

For example:

- You complete your billing and John Doe was short by \$34.50 because he has a new short-term disability policy.
- Now he shows a variance amount of (\$34.50).
- You will now go make a one-time payroll deduction change to collect money that the Local was short to zero out the variance.

Keep in mind if you make a One Time/Pay Period Deduction change on the same pay period dues normally come out on, you will need to add the regular dues amount and the \$34.50 together. If not, you will only get \$34.50 and be short now for a month's dues plus the \$34.50.

For example:

- John Doe's dues are \$100.00 on the first pay period and he is \$34.50 short.
- The treasurer would need to make a One Time/Pay Period Deduction change of \$134.50 on the first pay period.
- If making the same One Time/Pay Period Deduction change on the second pay period for which the deduction is normally \$0.00, then the deduction would need to be \$34.50.

When a member is owed a refund, you can use the One Time/Pay Period Deduction change feature to reduce the amount owed from their regular monthly dues amount. Just subtract the amount owed from the regular amount, then enter the new amount in the box.

Note: If a Permanent Deduction change is made on the same payroll period AFTER a One Time/Pay Period Deduction change has been made. The permanent change will override the One Time/Pay Period Deduction change.

Step 1:

From the Start Pay Period dropdown, select the payroll period in which you want the One Time/Pay Period Deduction change to take place.

Update Payroll Deduction

Member: Doe, John
Local: 9999
Pay Period: MAY-19 2nd Period Cutoff: 05/29/19 for JUL-19 Dues
Deduction:
Remarks:

Update Cancel

Note: There will typically be only one open pay period to make One Time/Pay Period Deduction changes to.

Step 2:

Type in the total amount that you would like to deduct for the one time in the New Deduction box. Enter the reason for the one-time change in the Remarks box, then click **Update**.

Update Payroll Deduction

Member: Doe, John
Local: 9999
Pay Period: MAY-19 2nd Period Cutoff: 05/29/19 for JUL-19 Dues
New Deduction: Current Deduction: 224.68
Remarks:

Update Cancel

Note: The current deduction amount shows beside the new deduction box.