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.

**Step 2:**

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

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.

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.
Step 2:

Type in the member’s last name and click Search.

Step 3:

Once in the member’s record, click on the Carrier Payroll tab.
To adjust a permanent deduction, click on the paper/pencil icon under permanent deduction.

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

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).

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.)
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**.

![Payroll Period Selection](image)

Step 3:

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

![Deduction Entry](image)

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.

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

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

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**.

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

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