

SMART TD

TD Connect: Steps for working the eBill

From the Members Tab

1. Add new members
2. Update member info

From the Home screen/Dashboard:

1. Accept valid transfers
2. Review pending transfers
3. Review exceptions and make updates and email artifacts to Membership Representative (MR) as necessary
4. Process eBill

From the eBill Section:

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

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

1. Search for the most recently certified eBill (eBill History)
2. Go to Final Bill (eBill History)
 - a. Pull Final Statement/Local & LCA fund report
 - b. Pull Follow Up Report
 - c. Print the member status report
3. Process the eBill final statement into WinStabs
4. If necessary, write checks, print voucher (WinStabs-NMR) and send payment to TD office
5. Issue member refunds as necessary (TD Connect & WinStabs)
6. Review your "Member Billed Amount Changes" report (Home screen or Reports)
7. Update payroll deductions as necessary (use the eBill follow up & Member Billed Amount changes reports)
8. Obtain the "live" member variance amounts from TD Connect for the monthly meeting report
9. Generate the Monthly Meeting Report (WinStabs)