

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 Amount Changes*** – this is a quick link to the report that shows upcoming changes to members billed amounts due to 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 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 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 Dues Authorizations – member that we do not have dues authorization cards for. Please remit signed, dated dues cards to your Membership Representative.

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
- 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. You can also add new members in this section. 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.

- 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)
- Representation tab –
 - Officer Positions – lists any officer positions the member may hold or have held.
 - Special Committees – lists any roles served on special committees.
- 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
 - Member Dues Receipt Statement
 - VSTD Waiver of Coverage (coming soon)
 - Cancellation of Coverage Form VSTD (coming soon)

Roster – a complete roster of all local members filtered by status type. The roster can be exported to excel to be sorted and filtered as the treasurer deems necessary.

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, and dues authorization cards. Updates can be processed directly from this screen.

Dues Menu

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
 - SMART TD – money collected for the Transportation Division portion of the members’ 5-part dues. (Part 1 of 5)
 - GCA – money collected for the General Committee of Adjustment portion of the members’ 5-part dues. (Part 2 of 5)
 - SLB – money collected for the State Legislative Board portion of the members’ 5-part dues. (Part 3 of 5)
 - PAC – money collected for contributions made to the UTU Political Action Committee.
 - DIPP – money collected for Discipline Income Protection Plan premiums
 - VSTD – money collected for Voluntary Short-Term Disability plan premiums
 - VLTD – money collected for Voluntary Long-Term Disability plan premiums
 - 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
 - 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.
 - 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
 - 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.
 - 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.
 - 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. Proper documentation in the form of meeting minutes should be provided to support the change.**
 - 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.

Local/ Carrier Receipts Breakdown– Dues Summary

- 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.

eBill Validation Issues – Dues Summary – 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.

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
- Unknown – avoid using

Members that qualify for exempt (e-49) status do not have to pay:

- All 5 parts of their dues
- Short-term disability premium
- PAC contributions
- DIPP premiums
- Members are still responsible for premiums for any UTUIA products and Long-term Disability that they subscribe to. 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:

- Deceased
- Resigned
- Retired
- Terminated
- Transfer to BLE
- Unknown – avoid using
- Janus Objector – *Janus Objectors are individuals that exercised their rights to remove themselves from union membership and have gone through the proper channels to do so. (TD President’s department processes Janus Objectors)

Members with Status Changes – 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.

Remaining Members – 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. 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.

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.
 - 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.
 - 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.

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.
- Only additions that are added manually will show in this section. The system does NOT automatically add “dues to return” amounts.
- 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.

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.

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.

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.

Carrier Menu

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.

Union Menu

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.

Reports Menu

You will find local-level reports in this menu.

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

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

Voting Eligibility – pull eligibility lists for nominations and elections in this report section.

End of Year – 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

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.**
 - A change in premium that may be owed for previous months will be collected by the IA and will not be on the eBill
 - 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.
 - Scheduled increases that are part of the natural aging of a policy will become effective on the eBill in accordance with the schedule below.
 - 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 15 th 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.

Member Exempt for 3 consecutive months				
Month	Member Status	UTUIA workflow	UTUIA billed amount on eBill	Change Reported on MBAC report by
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

Member Exempt for 4 consecutive months				
Month	Member Status	UTUIA workflow	UTUIA billed amount on eBill	Change Reported on MBAC report by
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

Member Exempt for 5 consecutive months				
Month	Member Status	UTUIA workflow	UTUIA billed amount on eBill	Change Reported on MBAC report by
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