

MUMS/2000

Multi-Union Membership System



BCTGM Enhancements Review - 2014

by Van Elgort Information Systems
December 2014
Version 8.51



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Automatic Withdrawal/Retire Form

When Changing Status to "Withdrawal" in MUMS, the program will generate the new Automated Retiring Card.

There are two copies on the one page. The Member's copy and the Local's Copy.

A copy of this Withdrawal Card is stored as a PDF on the Members record in the "Doc" tab. You can click on this at any time to view or print again.

The screenshot shows the 'Member Information' window for 'Demeglio, Nina'. Under the 'Member Documents' tab, a document named 'RC-11-18-2014-3570.PDF' is listed with a date of '11/18/2014' and a description of 'Withdrawal Card'. The window also shows navigation buttons and a 'Doc' tab selected in the bottom menu.

The image shows two copies of the 'Retiring and/or Withdrawal of Membership Card' for Nina Demeglio, Member SSN: 666-66-3570. The card is issued by ABC Bakery, Shop Code: ABC, and is valid until 12/31/2011. It includes instructions for depositing the card within two weeks of returning to work. The top copy is the 'MEMBER'S COPY' and the bottom copy is the 'LOCAL'S COPY'.

Also at monthend, the charge for these will now appear as item 10):

8) Reinstatement Fees	0	\$7.50	\$0.00
8) Reinstatement Fees	0	\$5.00	\$0.00
9) Reinstatement Fee Waived	0		\$0.00
9) Reinstatement Fee Waived	0		\$0.00
10) Automated RC's Issued	10	\$1.00	\$10.00

Required Setup for Automatic Withdrawal/Retire Form:

In MUMS under File | Setup | System Information on the Organization Tab you must have the following:

- City
- State
- Fin Sec Name
- Union Switch
- Local Union #

The screenshot shows the 'System Information' window for 'BCTGM Local 1234'. The fields are filled with: Address Line 1, Address Line 2, City: Any Town, State/Province: CA, Zip/Postal Code, Phone Number, Receipt Comment, Fin-Sec: Mr. John Smith, Union Switch: BCTGM, and Local Union #: 1234. The window has 'OK' and 'Cancel' buttons.

BAKERY, CONFECTIONERY, TOBACCO WORKERS & GRAIN MILLERS INTERNATIONAL UNION

RETIRING and/or WITHDRAWAL OF MEMBERSHIP CARD

MEMBER'S COPY

This Retiring/Withdrawal Card has been issued by Local Union 1234, Any Town, CA in accordance with BCTGM Constitutional Provisions to:

Member Name: Nina Demeglio

Member SSN: 666-66-3570

Member's Employer: ABC Bakery

Shop Code: ABC

Date Active Membership Ended: 12/31/2011



A Retiring/Withdrawal Card may be issued to members that have not worked or will not work for at least one entire calendar month. The effective date of issue may be the last day of the month during which the member worked. The qualifying absence from work may be the result of retirement, layoff, sickness, military service, voluntary or involuntary termination of employment and any employer approved leave of absence. Issuance of the card ends a member's obligation to pay union dues but also ends active membership in the Union and the rights that a member enjoys, (e.g. running for union office, voting in officer elections, voting on contract proposals, etc. . .)

Financial Secretary: Mr. John Smith

Date: 11/18/2014

THIS CARD SHOULD BE DEPOSITED WITHIN TWO WEEKS AFTER RETURNING TO WORK

(Please print your current address on the reverse side when depositing this card)

BAKERY, CONFECTIONERY, TOBACCO WORKERS & GRAIN MILLERS INTERNATIONAL UNION

RETIRING and/or WITHDRAWAL OF MEMBERSHIP CARD

LOCAL'S COPY

This Retiring/Withdrawal Card has been issued by Local Union 1234, Any Town, CA in accordance with BCTGM Constitutional Provisions to:

Member Name: Nina Demeglio

Member SSN: 666-66-3570

Member's Employer: ABC Bakery

Shop Code: ABC

Date Active Membership Ended: 12/31/2011



A Retiring/Withdrawal Card may be issued to members that have not worked or will not work for at least one entire calendar month. The effective date of issue may be the last day of the month during which the member worked. The qualifying absence from work may be the result of retirement, layoff, sickness, military service, voluntary or involuntary termination of employment and any employer approved leave of absence. Issuance of the card ends a member's obligation to pay union dues but also ends active membership in the Union and the rights that a member enjoys, (e.g. running for union office, voting in officer elections, voting on contract proposals, etc. . .)

Financial Secretary: Mr. John Smith

Date: 11/18/2014

THIS CARD SHOULD BE DEPOSITED WITHIN TWO WEEKS AFTER RETURNING TO WORK

Mass Change of Status Feature

In MUMS under File | Table Operations | Mass Change of Status:

Process	SSN	Last	First	Middle	Status	Status Date	Paid Thru
<input type="checkbox"/>	111-11-9147	Van Elgort	Richard	O	M	11/09/1995	01/31/2012
<input type="checkbox"/>	555-55-5551	Wojtalik	William	W	M	07/26/1996	12/31/2011
<input type="checkbox"/>	666-66-6663	Flor	Thomas		M	03/31/2004	12/31/2011
<input type="checkbox"/>	777-77-2443	Kant	Steven		M	01/01/2012	12/31/2011
<input type="checkbox"/>	777-77-7778	Van Elgort	David	A	M	07/26/1996	12/31/2011
<input type="checkbox"/>	888-00-8889	Weber	Brandon		M	07/26/1996	12/31/2011
<input type="checkbox"/>	888-88-1252	Shatun	Bonnie	J	M	07/26/1996	12/31/2011

On the above screen you first select Outgoing or Incoming.

Then you select the Shop to display the individual records. On the right side of this screen you can select all, unselect all or just checkoff the ones you want.

Then you select the Reporting period and if doing Deposit Card, you need to enter the Withdrawal Card Deposit Month.

Once you have indicated all the options you wish and selected the records, you then press the "PROCESS LIST" button to change the status. A report of those changed will be produced for your records.

If doing Withdrawals, the program will generate the automatic Withdrawal/Retire form as described on prior pages and will place a copy of this form in the member's DOC folder.

New Bi-Monthly Dues

In Local Dues Collection under System Control there is a new option for Bi-Monthly Dues.

When creating a prelist with this option set, the program will ask if it is a 2 or 3 week period. This is similar to the Weekly Dues that asks if it is a 4 or 5 week period.

The screenshot shows the 'System Control' dialog box. At the top, it says 'Shop: ABC' and 'Active'. There are navigation buttons (back, forward, home, etc.) and 'Find' and 'Close' buttons. The main area has a 'Report Sort Order' section with radio buttons for 'SSN', 'Last Name', 'Location/Name', 'Grp/Dept/Name', and 'Employee #'. To the right, there's a 'Billing Statements' section with radio buttons for 'Complete List', 'Exception List', 'Alternative Complete List', and 'No Billing Statement'. Below that, it says 'Use Dues Formulas tab in MUMS List[Code Tables] Financial to setup any additional formulas for this shop'. At the bottom, there's a section for 'Monthly (Standard) Dues', 'Weekly Dues', and 'BiMonthly Dues', with the 'BiMonthly Dues' option selected. The bottom of the dialog has tabs for 'Basic Options' and 'Process Control'.

Update Base Wage while Inputting Dues

This is used for shops that report a new dues amount without reporting new base wage and the dues code used is based upon base wage.

A small dropdown menu titled 'Dues Code' with 'B1' selected and a three-dot menu icon to its right.

Previously when you clicked on the “...” next to a dues code and it was Base Wage based, you could change the Base Wage. Now you can also just enter the new Dues amt in the Ind. Payment field and then press the “Calc” button.

The screenshot shows the 'Change Member Dues Details' dialog box. It has a title bar and a main area. The title is 'Change Member Dues for Van Elgort, Richard O'. Below the title, there are three rows of input fields: 'Dues Method' with a dropdown menu showing 'B1', 'Base Wage:' with a text box containing '8.00' and a 'Calc' button to its right, and 'Ind. Payment:' with a text box containing '\$26.00'. At the bottom, there are two buttons: 'Cancel' with a red 'X' icon and 'OK' with a green checkmark icon.

Alternate Billing Statement Format

SSN	Name	Payroll Month	# Dues Payments	Dues Amount	Init/Rein Fee	(Over)/Under Amount	Total Withhold
-----	------	------------------	--------------------	----------------	------------------	------------------------	-------------------

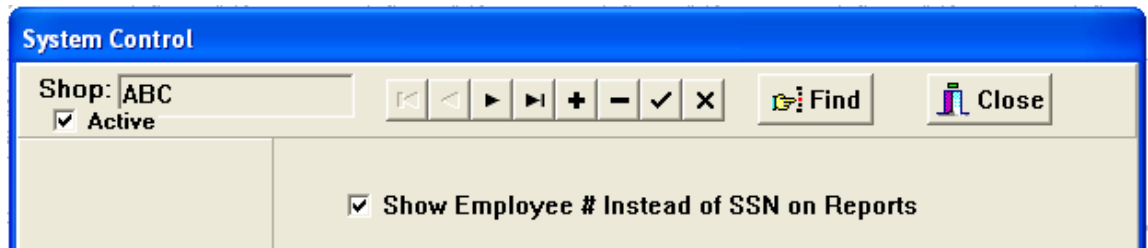
The above is the regular billing statement showing all of the dues in one column and separate (Over)Under amts.

The following is the alternative billing formation with current dues in one column and dues in arrears and any (Over)Under together in a column. This option is selection on the Shop maintenance screen.

SSN	Name	Payroll Month	# Dues Payments	Current Dues	Dues in Arrears	Init/Rein Fee	Total Withhold
-----	------	------------------	--------------------	-----------------	--------------------	------------------	-------------------

Employee# Based Billing Statement

Also on the shop maintenance screen is a new switch to print Employee # on billing statement instead of SSN...



This results in following change to the billing statement

Emp #	Name	Payroll Month	# Dues Payments	Dues Amount	Init/Rein Fee	(Over)/Under Amount	Total Withhold
01	Wojtalik, William W	01/2012	1	\$22.00	\$0.00	\$0.00	\$22.00
02	Weber, Brandon	01/2012	1	\$22.00	\$0.00	\$0.00	\$22.00

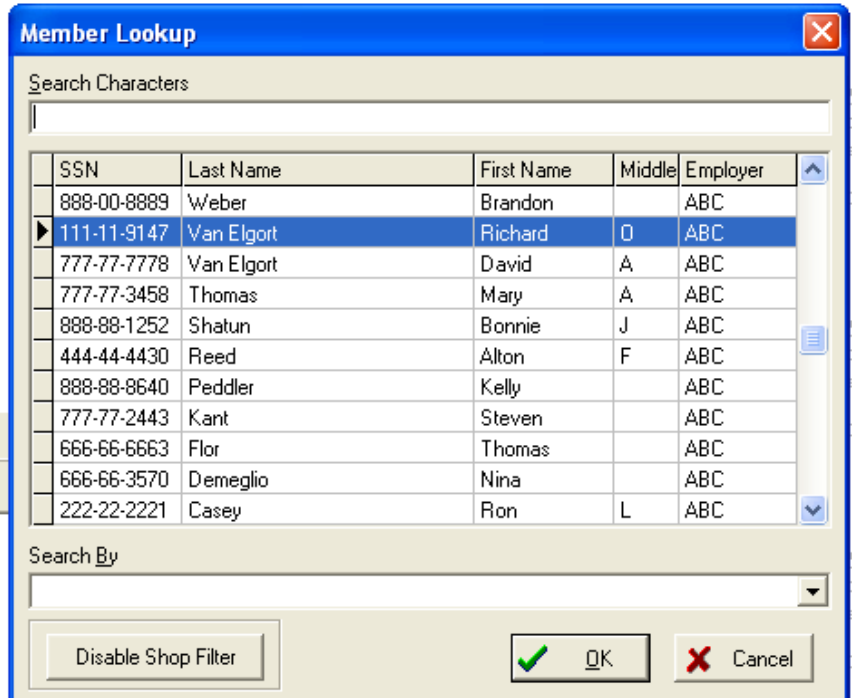
Also new is the display of the Employee # on the prelist/checkoff grid. Note that you can reposition any column by moving the header.

Shop: ABC Bakery		Period: January 2012								
SSN	Name	Emp #	Status	Prv-Pd	Dues Code	Period	Dues	In/Re Amt.	Over/Under	Total Rec'd
555-55-5551	Wojtalik, William W	01	M	12/2011	D22	01/2012	\$22.00	\$0.00	\$0.00	\$22.00
888-00-8889	Weber, Brandon	02	M	12/2011	D22	01/2012	\$22.00	\$0.00	\$0.00	\$22.00
111-11-9147	Van Elgort, Richard D	03	M	01/2012	B1	01/2012	\$0.00	\$0.00	\$0.00	\$0.00

New Shop Filer when adding Records to Prelist/Checkoff

When you press the “+” key to enter a new member to your existing prelist. The program now defaults to showing only records within the shop you are processing.

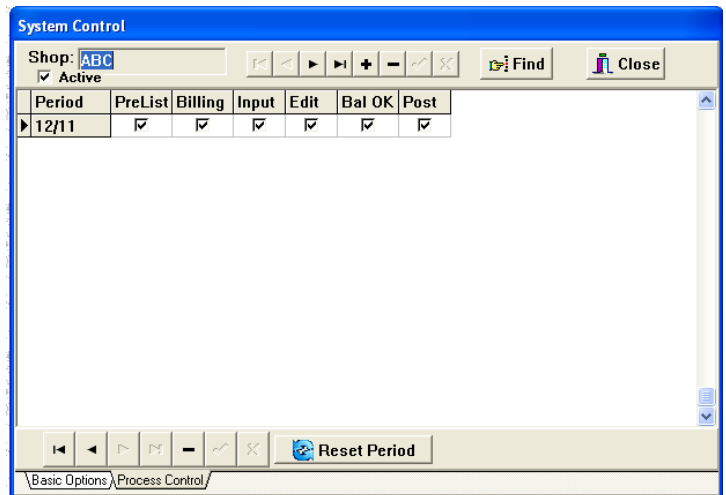
If you press the “Disable Shop Filter” the program will show you all members and the button will change to Enable to reset the shop filter.



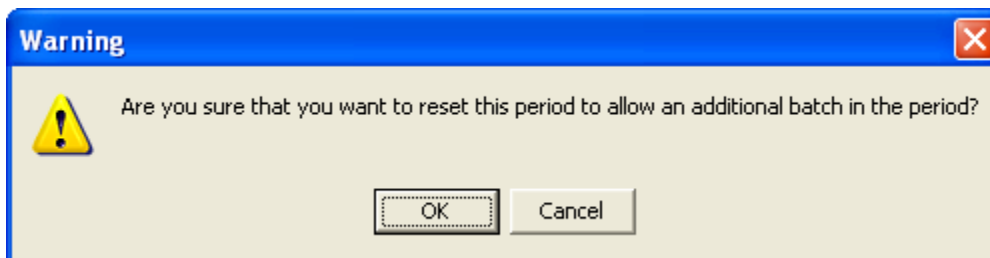
New Reset Period Button

On the Process Control tab of the Shop there is a new button called “RESET PERIOD”.

This is used if you wish to do a 2nd batch of dues for same period. It is not to remove an existing batch (that is done with the “-“ key to delete all payments for that period).

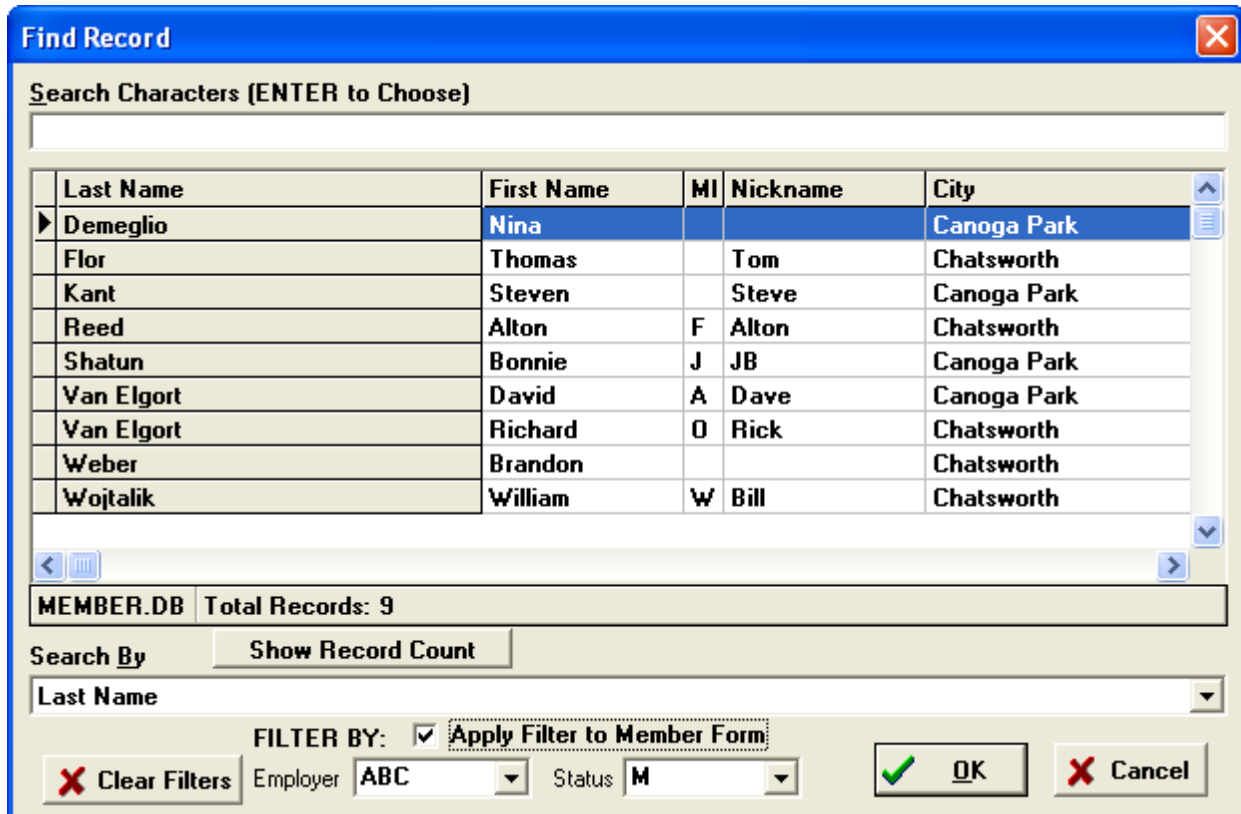


If you press the RESET PERIOD button you will be presented with a confirmation screen...



Expanded Member FIND Feature

In MUMS when you press the FIND button you will now have some expanded features.



The screenshot shows a 'Find Record' dialog box with a search input field and a table of results. The table has columns for Last Name, First Name, MI, Nickname, and City. Below the table is a status bar showing 'MEMBER.DB Total Records: 9'. At the bottom, there are filter options for 'Employer' (ABC) and 'Status' (M), along with 'Clear Filters', 'OK', and 'Cancel' buttons.

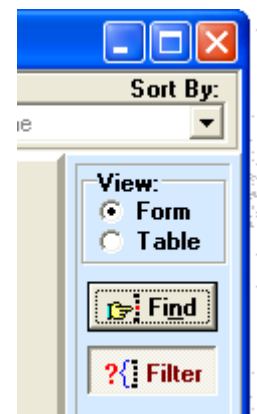
Last Name	First Name	MI	Nickname	City
Demeglio	Nina			Canoga Park
Flor	Thomas		Tom	Chatsworth
Kant	Steven		Steve	Canoga Park
Reed	Alton	F	Alton	Chatsworth
Shatun	Bonnie	J	JB	Canoga Park
Van Elgort	David	A	Dave	Canoga Park
Van Elgort	Richard	O	Rick	Chatsworth
Weber	Brandon			Chatsworth
Wojtalik	William	W	Bill	Chatsworth

You can use the pull down to filter by Employer and/or Status and the program will just show you those records.

If you press the “Show Record Count” the program will display a count of the number of records that match your filter request.

You can also click on “Apply Filter to Member Form”. This will reduce your membership records that are visible based upon the filter.

You will see that the number of records has been reduced and the “Filter” button on the side is highlighted. If you press that Filter button it will change your display to all of your records.



Note on the FIND screen the “Clear Filter” button is used to undo any filters.

Group Texting

The following screen is display when you request Reports | Build Email List:

If you mark the “Cell Phone – Text” then your further selections will be used to create a cell phone list for an email that will be actually sent via Phone Texting.

In order for this to work, however, you need to have the cell phone carrier marked on the members record next to their cell phone...

Code	Carrier
A	Alltel
C	AT&T
S	Sprint
T	T-Mobile
V	Verizon

If you need to add new carriers, it is done under Lists | Code Tables | Member Union and Cell phone tab.

Code	Carrier	Email Format
A	Alltel	@alltel.com
C	AT&T	@mms.att.com
S	Sprint	@messaging.sprintpcs.com
T	T-Mobile	@tmomail.net
V	Verizon	@vtext.com

Single Text or Email Feature

There is a new button on the side of a member's record that will bring up a choice of text or emails based upon what is in the member's record.

Auto Hide of SSN in Member & Grievance Module

If you have set the Hide SSN in the File | Setup | System Information screen, then the program will not display SSN in the Header and will show xxx-xx on the Basic Tab:

If you have update rights to members you can right click on SSN and then click on Show Full SSN to view the full SSN.

Show Full SSN

With Hide, the Primary Grievant SSN not show.

Grievance Participants	
SSN	Name
xxx-xx-9147	Van Elgort, Richard O
xxx-xx-2221	Casey, Ron L
xxx-xx-5551	Wojtalik, William W

Also SSN's are hidden in the Grievance Participants tab and Grievance FIND feature...

Number	Primary SSN	Steward	BA
G01	xxx-xx-2221	Adams, Samual	Cassidy, Butch
G02	xxx-xx-3331	Cluney, George	Walters, Barbara
G03	xxx-xx-3570	Jones, Nathon	Walters, Barbara
G04	xxx-xx-8889	Jones, Nathon	Adams, Samual

Display Payment Matrix

The screenshot shows the 'Member Information' window for 'Van Elgort, Richard'. A 'Payment Matrix' dialog box is open, displaying a table with the following data:

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2010	0	0	0	0	0	0	0	0	0	0	0	0
2011	0	0	0	0	0	0	0	0	0	0	0	0
2012	1	1	1	2	0	1	1	1	1	1	1	1
2013	1	1	0	1	0	0	0	0	0	0	0	0
2014	0	0	0	0	0	0	0	0	0	0	0	0

The dialog also includes 'OK' and 'Print' buttons. In the background, the 'Payment History' table shows a transaction on 04/02/2013 with a quantity of 1, a total of \$68.18, and a unit price of \$68.18.

By pressing the “PAYMENT MATRIX” button the program will calculate the number of payment made each month for the last 5 years and display it as shown. There is also a print button to get a hard copy of the same matrix.

Link Grievance Docs to Grievance with Add from Folder Feature

On the Documents tab of a Grievance the “Add from Folder” button can be used display all documents stored under the grievance number and link them automatically to this grievance.

If you double click the name of the folder it will display the full name of where the program is expecting the documents. This is useful when you are scanning directly into a folder by grievance number.

The screenshot shows the 'Grievance Information' window for 'Grievance # 2012-001' and 'Empl Gr #'. The 'Grievance Documents' tab is active, showing a table with columns 'Date Entered' and 'Document Name'. The 'Add from Folder' button is used to specify a folder path, which is shown as 'c:\mt2000\samples\docs\2012-001\'. A dialog box titled 'MUMS/2000: BCTGM Lo...' displays the path 'c:\mt2000\samples\docs\2012-001\'. The 'Documents' tab is selected in the background window.

Individual Dues Billing Feature

This new feature can be used to setup a group of members to receive printed bills or select all those setup for individual billing in the local or select an individual regardless of status to print a bill.

To setup individual billing for a person, you need to check the new field "Indiv Billing" found on the member's financial tab.

Dues and Wages	
Assess Nbr	
Curr Base Wage	\$8.00
Effective Date	
Prior Base Wage	
Ind. Payment	\$26.00
COPE/PAC Code	
Calc Dues Code	B1
Auto Exempt	<input type="checkbox"/>
Indiv Billing	<input checked="" type="checkbox"/>

Employer Information

Code: ABC Employer: ABC Bakery Sort By: Employer Name

Officers		
Name	Title	S

Products	
Employer	Products

Billing Statement Comment: This is where the memo goes for the billing statement.
You can have multiple lines.
And really there is a lot of space if you really want to use it up and be wordy.

Basic Locations Dates Documents Memo Additional Griev Steps Exclusion Notes UnionRep

Find Find Xref Range Filter Close

Also you can setup a memo to be printed at the bottom of all individual billings by using the Memo tab in the Employer Record.

Please note: This is the Employer record in MUMS not the Shop setup in Local Dues Collection.

The Individual Dues Filling Feature is found under the Dues Menu in MUMS:

Individual Billing Statements

Print Billing Statements For :

All Members

In Shop: Find...

Individual: Van Elgort, Richard O Find...

Period: 03/2012

Delq Dues Only Init Fee Due Only


OK Close

On this screen you select "All Members" with "Indiv Billing" marked, or by shop or my one member.

Note selecting by individual does not require that person to be marked or be active member.

Then you can select the period and optional only do Delq Dues or Only Init Fee's owed.

Please note that full Address of the local should be setup in File | Setup |System Information, organization info tab.

<p>BCTGM Local 1234 800 Main Street Any Town, CA 98795</p>		<p>Billing Statement Billing Date: November 18, 2014</p>								
<p>Van Elgort, Richard O c/o Van Elgort Information Sys 20244 Lorenzana Drive Woodland Hills, CA 91364</p>		<p>Shop #: ABC Shop Name: ABC Bakery SSN: XXX-XX-9147</p>								
<table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left; border-bottom: 1px solid black;"><u>Description</u></th> <th style="text-align: right; border-bottom: 1px solid black;"><u>Amount</u></th> </tr> </thead> <tbody> <tr> <td>Dues Owed For 02/12:</td> <td style="text-align: right;">\$24.00</td> </tr> <tr> <td>Dues Owed For 03/12:</td> <td style="text-align: right;">\$24.00</td> </tr> <tr> <td colspan="2" style="border-top: 1px solid black; text-align: right; padding-top: 5px;"> Total: \$48.00 </td> </tr> </tbody> </table>			<u>Description</u>	<u>Amount</u>	Dues Owed For 02/12:	\$24.00	Dues Owed For 03/12:	\$24.00	Total: \$48.00	
<u>Description</u>	<u>Amount</u>									
Dues Owed For 02/12:	\$24.00									
Dues Owed For 03/12:	\$24.00									
Total: \$48.00										
<p>Comments: This is where the memo goes for the billing statement.</p> <p style="margin-left: 40px;">You can have multiple lines.</p> <p style="margin-left: 40px;">And really there is a lot of space if you really want to use it up and be wordy.</p>										

Also a copy of the billing will be made into a PDF and stored in the DOCS folder for the member.

