MUMS * Multi-Union Membership System

Membership Management for the 21st Century

Practices & Procedures for ATU Locals using MUMS/2000

including ATU Coversheet

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Overview

This practices and procedures manual is being furnished to assist and coordinate the uses of MUMS/2000 within the Amalgamated Transit Union Locals. It is recognized that through unity we can accomplish much.

MUMS/2000 has been enhanced with exclusive features for ATU Locals consistent with ATU Headquarters requirements.

MUMS/2000 Status codes are the foundation to the coordinated effort. The enclosed list of Status Codes are required to successfully have MUMS/2000 automatically generate HQ Month-end Transmittal reports. There is a unique ATU Action Category feature that assists the user in selecting the proper Status Code when there is a change in the member's status. This will be described later in this document.

These important MUMS/2000 Status Codes are listed on two different sheets. Page #4 shows the Status Codes required for HQ Reporting. Page #5 lists Status Codes that locals often want to use for Local purposes.

All locals new to MUMS/2000 can receive their data from ATU HQ for free by writing to your ATU International President. MUMS/2000 comes with a file conversion program that will load ATU HQ data into MUMS/2000 databases and setup the proper Status Code for each individual.

Existing users of MUMS/2000 who wish to retain their data, must re-align their status codes to new scheme in order to produce the proper HQ Month-end Transmittal reports. All of the Month-end Transmittal reports are generated automatically based upon routine maintenance of membership records.

HQ – Yellow Sheet	Generated automatically based upon address change
HQ – White Sheet	Generated automatically based upon Name changes or request for card/certificate.
HQ – Pink Sheet	Generated automatically based upon Status Code change that denotes New and Reinstated members.
HQ – Green Sheet	Generated automatically based upon Status Code change that denotes Active to Pension or Pension to Active.
HQ – Blue Sheet	Generated automatically based upon Status Code change that denotes Withdrawals, Suspensions, or Deceased.

How does an ATU Local get started

First by reviewing the CD-ROM “MUMS/2000 Tutorial” Lessons 1 & 3 for basic understanding of the software.

After installing the actual MUMS/2000 Ver 5.xx Software, the user should practice in MT2000\Samples folder. Here are sample “play people” to practice your skills.

In samples the user should try to enter a few names of their own. The user should identify some members as Stewards and be able to make an employer code that matches their employer. These skills make use of the important features of “coded” fields.

A list of recommended Lesson Plans that refer to pages in MUMS/2000 reference manual are included at the end of this document.

By now the Local should have made a written request for their data by writing to ATU International President’s office. Upon receiving data from ATU HQ, the user is first reminded to change from \Samples to \Tables where their real membership records should be loaded. The on-time load program to convert ATU HQ data is called ATUHQIMPORT.exe and is provided on the same CD as MUMS/2000.

Many STANDARD reports are furnished with MUMS/2000. These skills are found in Chapter 7 pages 11 through 27.

The real power of MUMS/2000 program is that every field element of MUMS is SELECTABLE, SORTABLE & PRINTABLE. Pages 41 thru 64 of Chapter 7 outline how to make a Custom report from an existing Standard report.

In this 21st Century, we have all learned the lessons of training and education. Locals are encouraged to become educated in “window skills” by using windows tutorial materials, practicing skills and attending classes. A complete set of MUMS/2000 reference manuals will be provided to each ATU Local that acquires MUMS.

MUMS ATU Status Codes for HQ Reporting

Code	Description	Action Category	HQ Report Page
10	**ACTIVE MEMBER**		
11	**New Member - Admitted by Card**	N	Pink
12	**Member - from $2 Pensioner**	P	Green
13	**Member – Reinstated ****	R	Pink
14	**Member - from $4 Pensioner**	P	Green
16	**New Member – Initiated**	N	Pink
18	**Active Mbr - Pays dues manually**		
20	**AGENCY FEE - type G**		
24	**Fair Share Payer - type F**		
25	**Religious Objector - type J**		
26	**Rand - Canada - type R**		
37	**W/D ACTIVE MBR w/d CARD ISSUED**	W	Blue
52	**LoA – Military**		
60	**W/D Dismissed by Local**	W	Blue
61	**W/D Dismissed by Company**	W	Blue
64	**W/D Left Company Vol**	W	Blue
67	**W/D Company Dropped**	W	Blue
68	**W/D Transferred OUT of BU**	W	Blue
69	**W/D Transferred to Management**	W	Blue
70	**SUSP-DISMISSED by LOCAL**	S	Blue
71	**Susp-Dismissed by Company**	S	Blue
74	**Susp-Left Company Vol**	S	Blue
77	**Susp-Company Dropped**	S	Blue
78	**Susp-Transferred OUT of BU**	S	Blue
79	**Susp-Transferred to Management**	S	Blue
80	**50 Yr Pensioner at $2 rate**		
81	**50 Yr Pensioner at $4 rate**		
82	**Pensioner @$2 rate -prior 01/01/93**	P	Green
83	**Pensioner Reinstated @ $2 rate ****	R	Pink
84	**Pensioner @$4rate -after 12/31/92**	P	Green
85	**Pensioner Reinstated @ $4 rate ****	R	Pink
86	**Deceased Active Member**	D	Blue
87	**Deceased $2 Pensioner**	D	Blue
88	**Deceased $4 Pensioner**	D	Blue
92	**Suspended $2 Pensioner**	S	Blue
94	**Suspended $4 Pensioner**	S	Blue
96	**W/D $2 Pensioner**	W	Blue
97	**W/D $4 Pensioner**	W	Blue

Use of **Action Categories** are described later…
They are **N**ew Member, **R**einstate, **S**uspend, **W**ithdrawal, **P**ension to/from, **D**eceased.

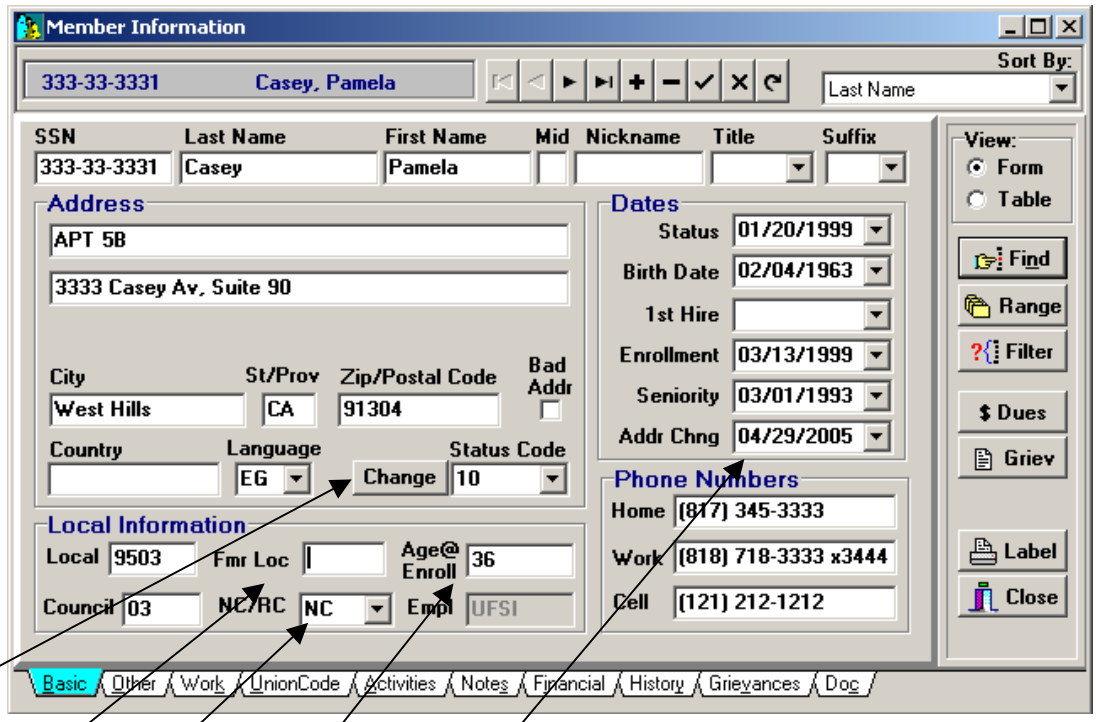
Additional MUMS ATU Status Codes for Local Use Only

Code	Description
01	Ext Org – Cold Lead
02	Ext Org – Tired to Contact
03	Ext Org – Undecided Person
04	Ext Org – Lean Against Union
05	Ext Org – Lean for Union
06	Ext Org – Signed Auth Card
07	Ext Org – Vol Organizer
08	Ext Org – Not Eligible to Vote
30	Non-Member – Open Shop
40	Courtesy List – Misc
41	Courtesy List – Assoc – AFL-CIO
44	Courtesy List – Other Union
45	Courtesy List – Elected Official
46	Courtesy List – Manager
49	Class Action Grievance

Unique Fields for ATU in MUMS/2000

Following is an example of the BASIC Tab within MEMBER form.

The following items are unique to ATU:



- Change Status Button – This is used to change status code using ATU Activity Categories as described in the next section. This ATU Function will update the Status Code Field and Status Date Field.

- Fmr Loc field is used to hold a former ATU Local number when doing an “Admit by Card” (Status 11)

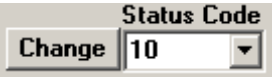
- NC/RC – This field is automatically updated with “NC” for name change if any portion of the name is changed. A name change will be included on the WHITE ATU HQ report and HQ will automatically send a Plastic Card. If you wish to manually request a Plastic Card use “PC”, use “MC” for Membership Certificate or “PCMC” for both. Please remember that the automatic NC created for name change will also request the plastic card.

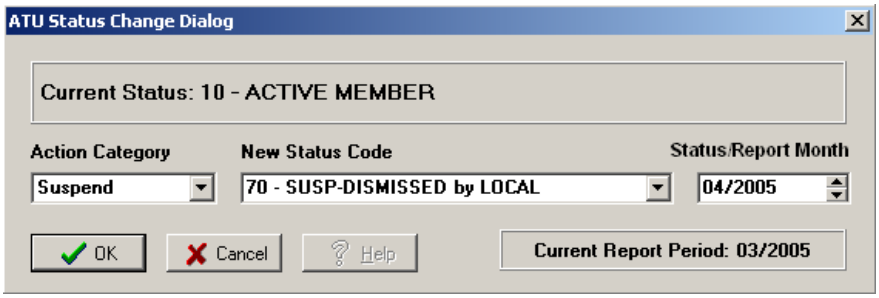
- Age@Enroll is the field to hold the age of the member at enrollment. This field is automatically loaded from HQ data and is recalculated if you have to correct the Birthdate or Enrollment Date.

- Address Change Date – This field is automatically updated when any portion of the address is changed. There is also an internal Address-Change-Flag that is used to generate the YELLOW ATU HQ report.

Status Code/Action Category Feature

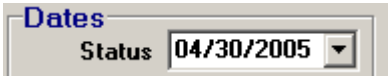
If you press the CHANGE button on the Basic Tab next to Status Code you will have this new screen displayed.





The Action Category is used to filter the selection of Status Codes. The possible Action Categories are New Member, Reinstate, Suspend, Withdrawal, Pension to/from, Deceased and All Choices. The Report/Status Date defaults to Today's-Date as a starting place. The Current Report Period is shown at the bottom to remind you of the next report that is going to be sent to ATU Headquarters, in case you wish to back date an activity. On many of the Action Categories you will only see Month & Year. The program will automatically insert the first of the month for New Member, Reinstate & Pension to/from; and insert the last day of the month for Suspend & Withdrawal. This Date is automatically inserted into other fields based upon the chart below. Please note that Deceased activity uses dates differently.

Once you press the OK button the computer will insert the new Status Code into the Status Code Field and insert the Status/Report Date based upon the following chart.



Note: Status Date is used to control Month-end HQ reporting.

- - - User Input - - -		- - - - - - Computer Generated Results - - - - - -			
Activity	Status/Report Date	Status Date (Basic Tab)	Enrollment Date (Basis Tab)	Withdrawal Date (Financial Tab)	Termination Date (Financial Tab)
New Member	Month/Year	1st Day of Effective Month	1st Day of Effective Month **(**)**		
Reinstate	Month/Year	1st Day of Effective Month	1st Day of Effective Month		
Suspend	Month/Year	Last Day of Effective Month			
Withdrawal	Month/Year	Last Day of Effective Month		Last Day of Effective Month	
Pension to/from	Month/Year	1st Day of Effective Month			
Deceased	Month/Day/Year (Actual Date of Death)	Current Report Month			Entered Effective Date
All Choices	Month/Day/Year	Entered Effective Date			

Manual Review Notes:

(**) On an admit by card the enrollment date should be changed to member's original enrollment date within ATU.

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The following is a list of the Status Codes that are shown for each Action Category.

New Member

11 – New Member – Admitted by Card
16 – New Member – Initiated

Reinstate

13 – Member Reinstated
83 – Pensioner Reinstated @$2 rate
85 – Pensioner Reinstated @$4 rate

Suspend

70 – SUSP-DISMISSED BY LOCAL
71 – Susp-Dismissed by Company
74 – Susp-Left Company Vol
77 – Susp-Company Dropped
78 – Susp-Transferred Out of BU
79 – Susp-Transferred to Management
---
92 – Suspended $2 Pensioner
94 – Suspended $4 Pensioner

Withdrawal

37 – W/D ACTIVE MBR w/d CARD ISSUED
60 – W/D Dismissed by Local
61 – W/D-Dismissed by Company
64 – W/D-Left Company Vol
67 – W/D-Company Dropped
68 – W/D-Transferred Out of BU
69 – W/D-Transferred to Management
---
96 – W/D $2 Pensioner
97 – W/D $4 Pensioner

Pension to/from

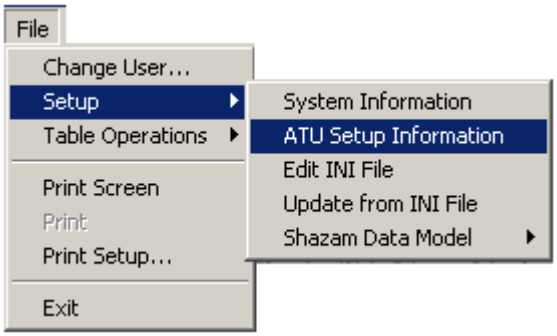
12 – Member from $2 Pensioner
14 – Member from $4 Pensioner
84 – Pensioner @$4 rate (after 12/31/92)

Deceased

86 – Deceased Active Member
87 – Deceased $2 Pensioner
88 – Deceased $4 Pensioner

Setup ATU Coversheet

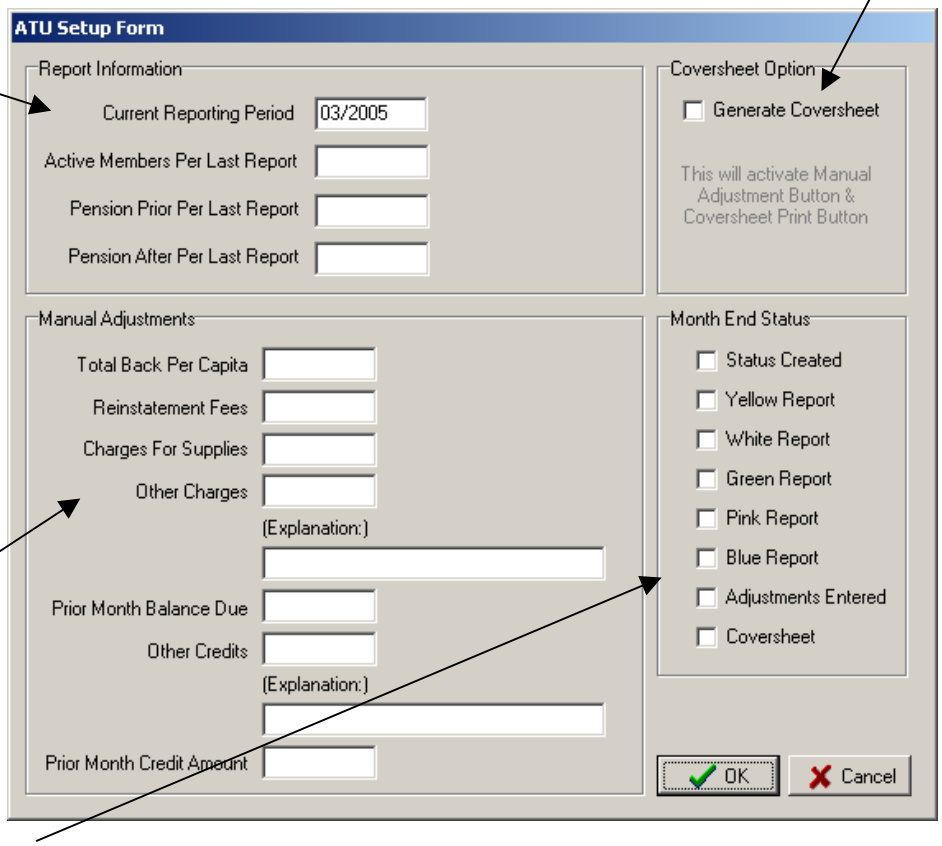
WARNING: You should only use setup to produce ATU Coversheet if you have verified your beginning membership counts and have just completed a month-end cycle. You can produce all of the ATU HQ transmittals of Yellow, White, Pink, Green and Blue without having Coversheet option turned-on and complete the coversheet manually.



You can enable the ATU HQ Coversheet by clicking on the "Generate Coversheet".

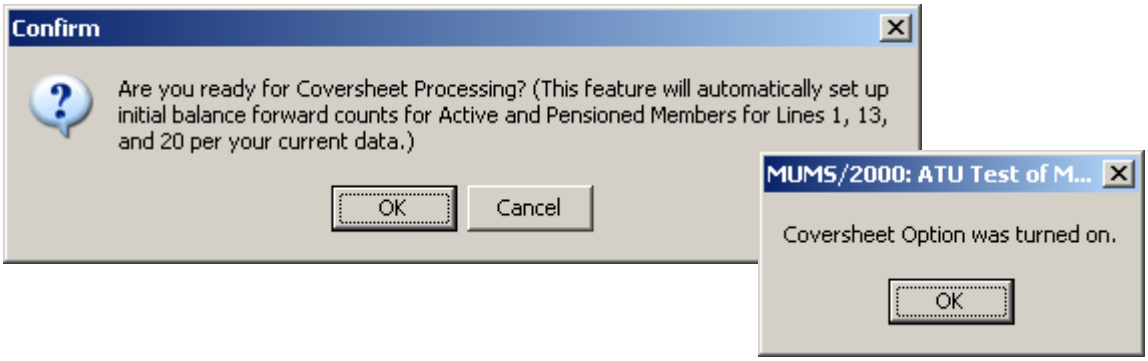
Report Information contains the balance forward counts… (These are established when you click to enable "Generate Coversheet". These are re-established when you CLOSE a month-end. If a correction needs to be made you must contact Van Elgort Information Systems.

This area is where Manual Adjustments are stored. These figures are entered during Step #3 of the Month-end processing.



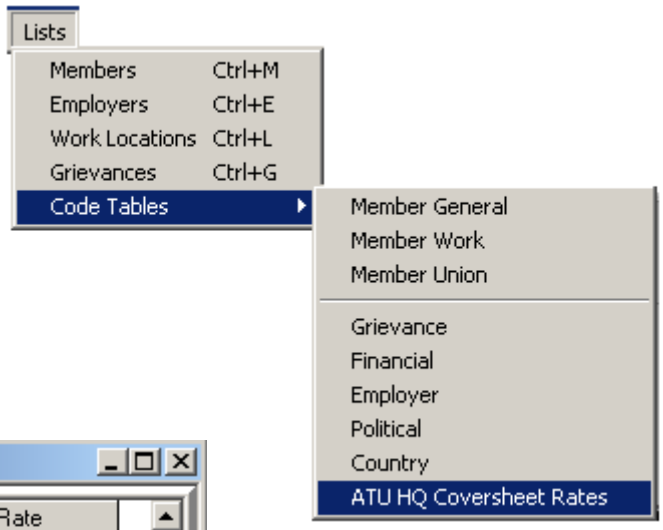
This area denotes the progress completed so far during a month-end. This is used to control the Coversheet and make sure that all reports are completed first.

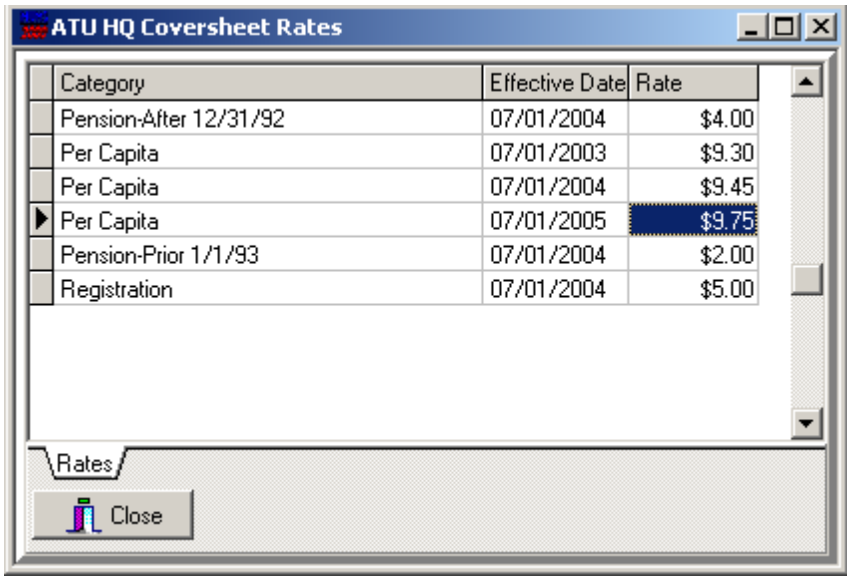
If you click to "Generate Coversheet" you will be shown this confirmation screen:



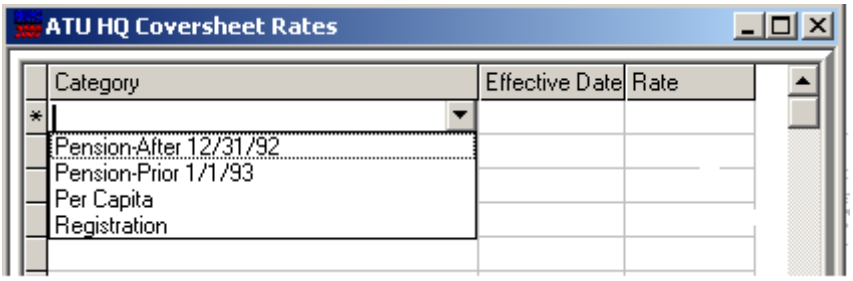
Setup ATU HQ Rates for Coversheet

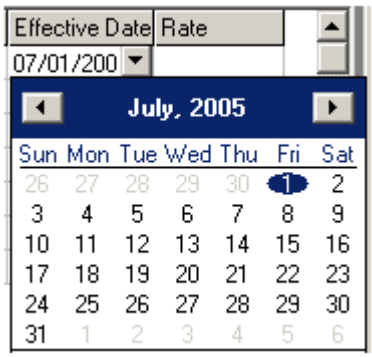
Note: HQ Rates thru July 2005 have already been established. You should enter any new rates prior to producing a coversheet. The rate table will allow you to enter future rates and will use those that apply to the correct reporting month.





If you need to enter a new rate, just press in the Insert Key (INS) and then select the type of rate you wish to change…

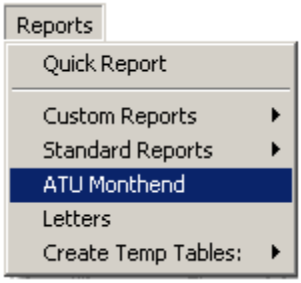




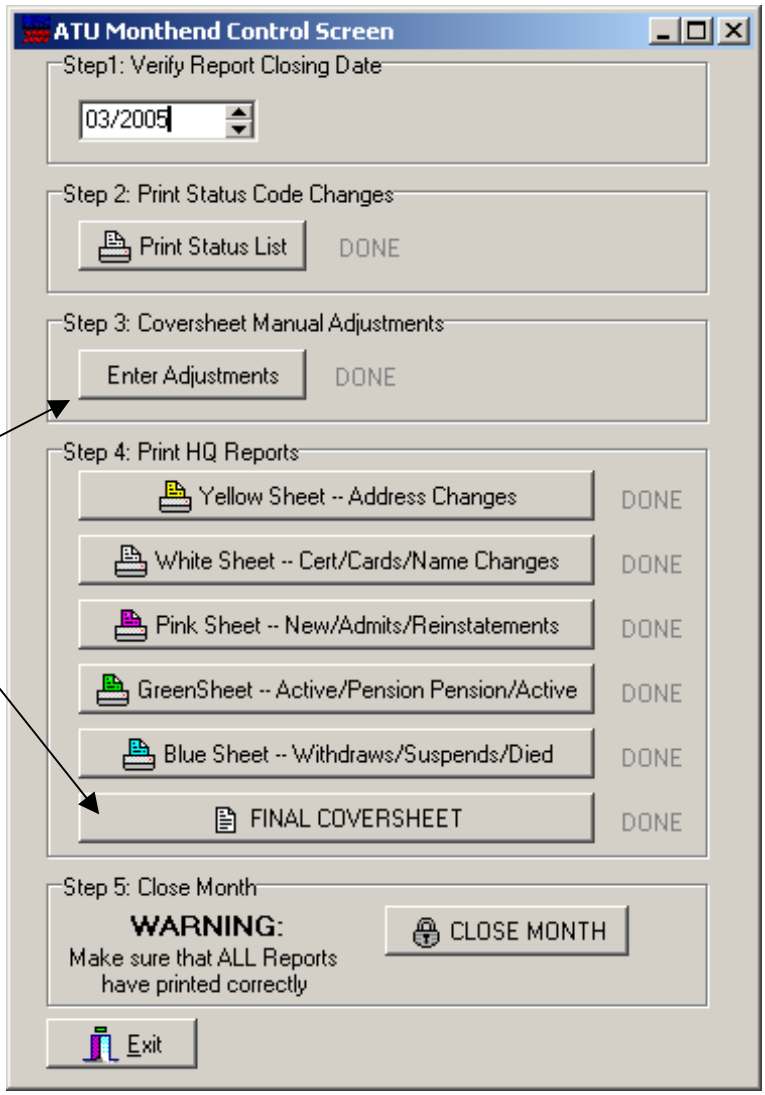
Then you select the starting date…

Then you enter the rate amount…

Month-end Processing Screen



Month-end Processing is started from the Reports Menu by requesting "ATU Monthend"



As noted on this screen, there are Five steps. Step #1 is to verify the corrent month & year. This field automatically increments after you close a prior month.

If **"Generate Coversheet" OFF**: Step #3-Manual Adjustments and "FINAL COVERSHEET" will be inactive and grayed-out.

If **"Generate Coversheet" ON**: Then you must do Step #2 prior to being allowed to do any HQ Reports in Step #4. You must request all reports prior to being allowed to do FINAL COVERSHEET which must be done prior to being allowed to CLOSE MONTH.

Step #2 is the request "Print Status List". This provides a list of those individuals whose status code changed during the month you are processing. This list is useful to reconcile HQ monthly transmittal reports and coversheet.

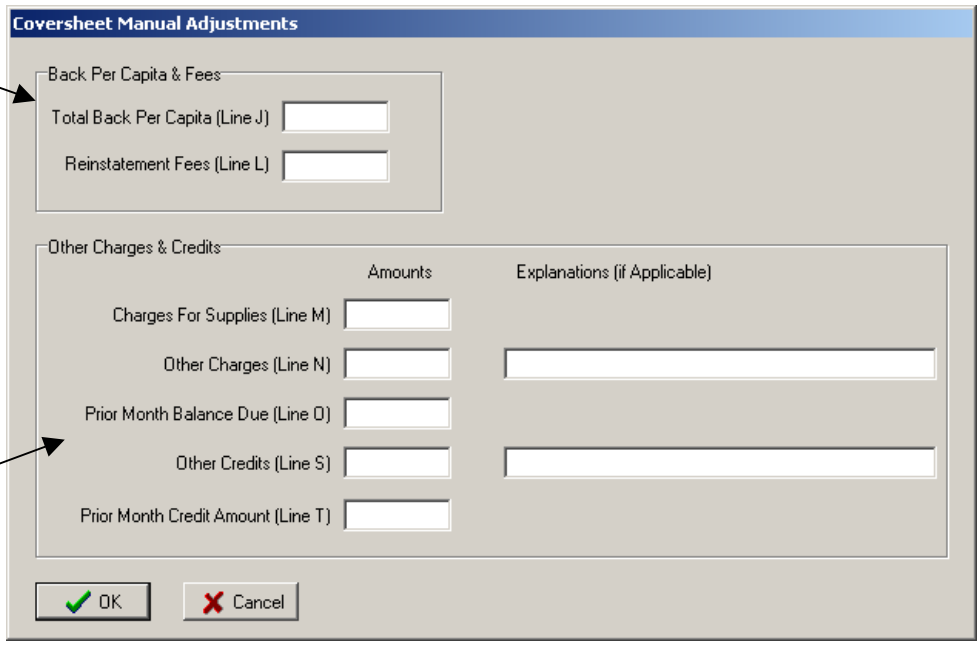
Note: If Coversheet is enabled, then "DONE" will be displayed next to each item you have completed. Until you CLOSE MONTH, you can re-run any step you wish.

Note: Yellow & White Reports will contain all recent changes while Pink, Green, Blue will only reflect those changes of status that occurred in the Reporting Period.

Step #3 – Manual Adjustments (Only Active if Coversheet is enabled). These fields are used to print and calculate the coversheet.

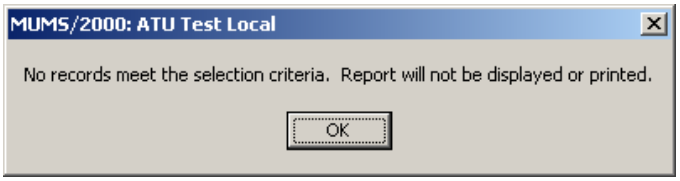
In this area you enter Total Back Per Capita you have calculated and Enter any Reinstatement Fees. See Page 24-25 for Sample & blank Back Per Capita & Fees Worksheet.

Here you enter additional charges and/or credits with explanations if needed.



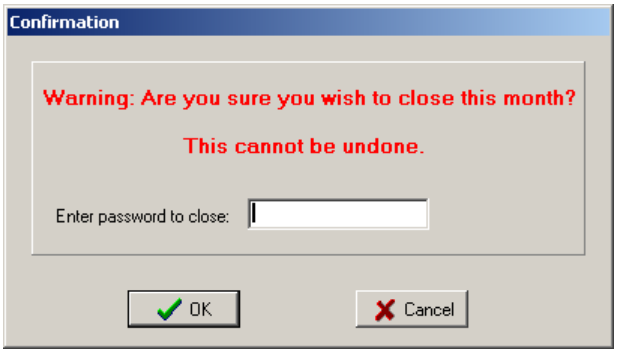
Step #4 is where you print the five HQ Transmittal reports and FINAL COVERSHEET if enabled.

This screen will be displayed if there are no matching transactions for a specific report.



NOTE: You should do a MUMS Backup prior to next step. **(File|Table Operations|Backup & Restore –Select All-BACKUP)**

Step #5 is to CLOSE MONTH.
When you request to CLOSE MONTH you will be presented with the confirmation to enter your password to confirm that you have run all of the reports and are ready to Close the month.



Month-end Closing does the following:

- Increments Report Closing Date by one month.
- Clears the Address Change Flag that was used to report an address change.
- Clears the NC/RC field that denoted name change and card requests.
- Changes those with temporary Status Codes 11, 12, 13, 14 or 16 to Status 10.
- Changes Pensioner Reinstatements of Status 83 to 82 and Status 85 to 84.

The following pages are examples of the printed reports…

Optional Status Change List

ATU Status Change List

04/30/2005

Local Union #9876 Located at Any Town, USA Report for month of 04/2005

Page 1

Name	SSN	Status Date	Status Code - Description	
Presley , Elvis	103-66-5920	04/01/2005	11	- New Member - Admitted by Card
Kant , Steven	777-77-2443	04/01/2005	13	- Member - Reinstated
Peddler , Kelly	888-88-8640	04/01/2005	14	- Member - from $4 Pensioner
Montana , Joe	201-66-6792	04/01/2005	16	- New Member - Initiated
Thomas , Mary A	777-77-3458	04/30/2005	37	- W/D ACTIVE MBR w/d CARD ISSUED
Van Elgort , David A	777-77-7778	04/30/2005	70	- SUSP-DISMISSED by LOCAL
Weber , Brandon	888-00-8889	04/01/2005	84	- Pensioner@$4rate -after 12/31/92
Flor , Thomas	666-66-6663	04/13/2005	87	- Deceased S2 Pensioner

This report is for internal Local use only to help check-out the HQ Month-end transmittals. The report is in sequence by new status code and then last name.

Yellow Sheet

"Yellow Sheet"

Address Change Date

Send To Int'l Office

04/30/2005

Amalgamated Transit Union

Change of Address form

Local Union #9876 Located at Any Town, USA

Report for month of 04/2005

New Address Information Shown Below

Yellow- Page 1

Int'l offc use	FullName	Social Security or Social Insurance	Date Enrolled	Delivery Address	Street Address	City	State	Zip
	Pamela Casey	333-33-3331	03/13/1995	APT 6B	3333 Casey Av, Suite 90	West Hills	CA	91304
	Nina Demeglio	666-66-3570	06/06/1996	Suite 4A	3579 Demeglio Ave	Canoga Park	CA	91311-1234

White Sheet

"White Sheet"

Send To Int'l Office

04/30/2005

Certificates/Cards/Name Changes

Amalgamated Transit Union

Local Union #9876 Located at Any Town, USA

Report for month of 04/2005

White- Page 1

Int'l offc use	Corrected FullName	Social Security or Social Insurance	Age at Enrollment (LocalType)	Enrollment Date	NC = Name Change & PC PC = Plastic Card Requested MC = Mbr Cert Requested	Int'l Office Use
	Alton F Reed	444-44-4430	40	06/01/1987	PC	
	Bonnie J Shatun-Reed	888-88-1252	42	08/06/1989	NC	

"Pink Sheet"

New (16), Admit by Card (11)
Reinstatements (13, 83, 85)

Send To Int'l Office

Amalgamated Transit Union

04/30/2005

Local Union #9876 Located at Any Town, USA Report for month of 04/2005

Pink- Page 1

Int'l offc use	FullName Addl-DeliveryAddress StreetAddress City State Zip	Social Security or Social Insurance	Age at Enrollment (Local Type)	Date Enrolled	Current Status Code	Effective Date	Former Local # (SubLocal)
	Elvis Presley 1 Rock-n-Roll Dr Memphis TN 38999	103-66-5920	21	04/05/1966	11	04/01/2005	5555
	Steven Kant 2468 Kant Parkway Canoga Park CA 91306-2468	777-77-2443	47	07/07/1991	13	04/01/2005	
	Joe Montana 28 Football Dr Miami FL 33065	201-66-6792	54	04/01/2005	16	04/01/2005	

Green Sheet

"Green Sheet"

Send To Int'l Office

04/30/2005

Active to Pension (10->84)
Pension to Active (82->12, 84->14)

Amalgamated Transit Union

Local Union #9876

Located at Any Town, USA

Report for month of 04/2005

Green- Page 1

Int'l offc use	FullName	Social Security or Social Insurance	Date Enrolled	Current Status Code	Effective Date		Int'l Office Use
	Brandon Weber	888-00-8889	07/07/1990	84	04/01/2005		
	Kelly Peddler	888-88-8640	10/08/1995	14	04/01/2005		

"Blue Sheet"

Withdrawn (37, 60-69, 96, 97))
Suspended (70-79, 92, 94) Deceased (86-88)

Send To Int'l Office

Amalgamated Transit Union

04/30/2005

Local Union #9876 Located at Any Town, USA Report for month of 04/2005

Blue- Page 1

Int'l offc use	FullName	Social Security or Social Insurance	Date Enrolled	Current Status Code	Suspension or Effective Date	Date Withdrawn (Last day of month)	Actual Date Died
	Mary A Thomas	777-77-3458	12/12/1993	37	04/30/2005	04/30/2005	
	David A Van Elgort	777-77-7778	10/10/1990	70	04/30/2005		
	Thomas Flor	666-66-6663	08/08/1984	87	04/13/2005		02/14/2005

Key to Interpresting the Blue Sheet *(Read Report Dates Right to Left)*

1. Read Dates Right to Left: Mary Thomas was Withdrawn David Van Elgort was Suspended Thomas Flor Died 2/14/2005, local told 4/13/2005
2. Read Current Status Code: Mary Thomas – 37 – WD David Van Elgort – 70 – Susp Thomas Flor – 87 – Died 2/14/05, local told 4/13/05

Note: Every Line will have a Suspension/Effective Date:
(If Death: Effective Date will be date local was notified of death, 4/13/2005
(If Withdrawal: Effective Date will be same as Withdrawal Date, 4/30/2005
(If Suspension: There is only one date that will show. It will be the Suspension Date, 4/30/2005

AMALGAMATED TRANSIT UNION - MONTHLY REPORT

Local Union **1234** of **Anytown, USA,** For Month Ending **03/31/2005**

Active Members		Pensioned (Prior to 1/1/93)		Pensioned (After 12/31/92)	
1) Members per Last Report	0	13) Members per Last Report	0	20) Members per Last Report	0
2) New Members Initiated	0	13a) Reinstated	0	21) Transfered from Active (Line 10)	0
3) Admitted By Card	0	13c) Total (Lines 13 and 13a)	0	21a) Reinstated	0
4) Reinstated	0			22) Total (Lines 20 and 21)	0
5) Transferred from Pension (Line 17 plus line 26)	0				
6) Total (Lines 1 thru 5)	0				
Deductions		**Deductions**		**Deductions**	
7) Members Withdrawn	0	14) Members Withdrawn	0	23) Members Withdrawn	0
8) Members Deceased	0	15) Members Deceased	0	24) Members Deceased	0
9) Members Suspended	0	16) Members Suspended	0	25) Members Suspended	0
10) Transfered to Pension	0	17) Transfered to Active	0	26) Transfered to Active	0
11) Total (Lines 7 thru 10)	0	18) Total (Lines 14 thru 17)	0	27) Total (Lines 23 thru 26)	0
12) Total (Line 6 less 11)	0	19) Total (Line 13 less 18)	0	28) Total (Line 22 less 27)	0

PER CAPITA TAX

A) Active Members		0	@	9.45	=	0.00
A1) Agency Fee Payers		0	@	9.45	=	0.00
A2) Fee Objectors		0	@	9.45	=	0.00
A3) Religious Objectors		0	@	9.45	=	0.00
A4) Rand Fee Payers		0	@	9.45	=	0.00
B) Member Pensioned (prior to 1/1/93)	(Line 19)	0	@	2.00	=	0.00
C) Members Pensioned (after 12/31/92)	(Line 28)	0	@	4.00	=	0.00

PER CAPITA FOR MEMBERS WITHDRAWN OR DECEASED IN CURRENT MONTH

D) Active Members Withdrawn		0	@	9.45	=	0.00
E) Pensioned Members (prior to 1/1/93) Withdrawn	(Line 14)	0	@	2.00	=	0.00
F) Pensioned Members (after 12/31/92) Withdrawn	(Line 23)	0	@	4.00	=	0.00
G) Active Members Deceased	(Line 8)	0	@	9.45	=	0.00
H) Pensioned Members (prior to 1/1/93) Deceased	(Line 15)	0	@	2.00	=	0.00
I) Pensioned Members (after 12/31/92) Deceased	(Line 24)	0	@	4.00	=	0.00

BACK PER CAPITA AND FEES

J) Back Per Capita Tax					=	0.00
K) New Members' Registration Fees	(Line 2)	0	@	5.00	=	0.00
L) Reinstatement Fees (at $ .50 per month)					=	0.00

OTHER CHARGES

M) Total Charges for Supplies					=	0.00	
N) Other Charges					=	0.00	
O) Prior Month Balance Due (if applicable)					=	0.00	P) $0.00
							Total Lines A thru O

CREDITS

Q) 50 Year Pension Members (prior to 1/1/93)		0	@	2.00	=	0.00	
R) 50 Year Pension Members (after 12/31/92)		0	@	4.00	=	0.00	
S) Other Credits					=	0.00	
T) Prior Month Credit Amount (if applicable)					=	0.00	U) $0.00
							Total Lines Q thru T

AMOUNT FORWARDED (Line P less Line U) V) $0.00

We, the undersigned, hereby certify that the foregoing report is correct.

_____ (President) _____ (Financial Secretary)

MUMS/2000 Suggested Lesson Plan

	Reference Manual	
	Chapter	Page
Moving from \Samples to \Tables	2	11
Introduction to Windows 95		
Desktop, Menu, Status Bar (Hide)	1	2-5
Left versus Right Click	1	6
Running Programs	1	7
MUMS/2000 Menu & Tool Bars		
Menu Bar	1	19-22
Tool Bar	1	24-25
Status Bar	1	11
Membership Information		
Minimize, Maximize, Close (Icon, X, Close)	1	3,8
FIND, Table View Option	4	1
Basic - Show Address Change Date (do change)	4	7
Other - Show Political Action	4	8-9
Work - Show link to Employer	4	11-13
UnionCode- Show other Reps	4	14-16
Activities - Add one	4	17-18
Notes - show address change note	4	19-20
Financial	4	21-23
History -Show History Print	4	24-25
Grievances, mention side button also	4	26
Documents - Attached Document & test	4	27
Add new record	4	4
Setup System Information		
Add new spare code	2	6
Disable Ethnic, Citizen	2	6
Employer, Work Location & Code Tables		
Employer with Locations	3	1-10
Work Location	3	11-15
Union Codes (Add new one)	2	41
Political Codes	2	51

	Reference Manual	
	Chapter	Page
Membership Again		
Other - Ethnic & Citizen Missing	4	8
Add Voter History	4	9
Add new Union Codes	4	15
Show Spare Fields	4	16
Grievance Processing		
Various Method to Execute (Menu, Tool, Side bar)	4	26,29
Each Tab	6	1-9
Show Standard Reports	7	25-27
Misc Maintenance		
Show Mass Change	2	30
Show Field Assign	2	32
Show Area Code Change	2	34
Quick Reports		
Print out Grievance Codes	7	1-4
Search Membership for Sex-F	7	5-10
Standard Reports		
Show Menu	7	15
Select Labels	7	22-24
Pick Union Rep ask for “Stew”	7	19
Custom Reports		
Do Custom Steward Labels (Memunrep.db, fullname field)	7	37-66

ATU Practice Lessons

In order to create the previous HQ Month-end Transmittals the following activities were done using MUMS/2000 SAMPLES database.

Member	Activity	Resulting HQ Report
Casey, Pamela	Change Address	Yellow Sheet
Demeglio, Nina	Change Address	Yellow Sheet
Reed, Alton	Request Plastic Card – PC using "NC/RC" Field	White Sheet
Shatun, Bonnie	Change Name	White Sheet
Presley, Elvis 103-66-5920	Add new record (admit by card) with Status 11 from Local 5555	Pink Sheet
Kant, Steven	Action: Reinstate (Status 13)	Pink Sheet
Montana, Joe 201-66-7692	Add new record with Status 16	Pink Sheet
Weber, Brandon	Action: Pension to $4 (Status 84)	Green Sheet
Peddler, Kelly	Action: $4 Pension to Active (14)	Green Sheet
Thomas, Mary	Action: Withdrawn (Status 37)	Blue Sheet
Van Elgort, David	Action: Suspend (Status 70)	Blue Sheet
Flor, Thomas	Action: Deceased (Status 87) Make Effective Date = Actual Date of Death: 2/14/2005	Blue Sheet

Combined List of ATU MUMS Status Codes

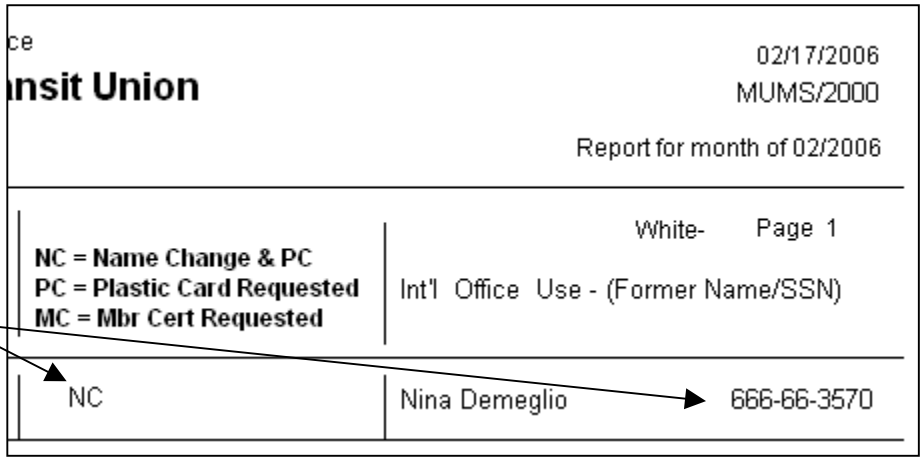
Code	Description
1	*Ext Org - Cold Lead*
2	*Ext Org - Tried to Contact*
3	*Ext Org - Undecided Person*
4	*Ext Org - Lean Against Union*
5	*Ext Org - Lean for Union*
6	*Ext Org - Signed Auth Card*
7	*Ext Org - Vol Organizer*
8	*Ext Org - Not Eligible to Vote*
10	**ACTIVE MEMBER**
11	**New Member - Admitted by Card**
12	**Member - from $2 Pensioner**
13	**Member - Reinstated**
14	**Member - from $4 Pensioner**
16	**New Member - Initiated**
18	**Active Mbr - Pays dues manually**
20	**AGENCY FEE - type G**
24	**Fair Share Payer - type F**
25	**Religious Objector - type J**
26	**Rand - Canada - type R**
30	*Non-Member - Open Shop*
37	**W/D ACTIVE MBR w/d CARD ISSUED**
40	*Courtesy List - Misc*
41	*Courtesy List - Assoc - AFL-CIO*
44	*Courtesy List - Other Union*
45	*Courtesy List - Elected Official*
46	*Courtesy List - Manager*
49	*Class Action Grievance*

Code	Description
52	**LoA - Military**
60	**W/D Dismissed by Local**
61	**W/D Dismissed by Company**
64	**W/D Left Company Vol**
67	**W/D Company Dropped**
68	**W/D Transferred OUT of BU**
69	**W/D Transferred to Management**
70	**SUSP-DISMISSED by LOCAL**
71	**Susp-Dismissed by Company**
74	**Susp-Left Company Vol**
77	**Susp-Company Dropped**
78	**Susp-Transferred OUT of BU**
79	**Susp-Transferred to Management**
80	**50 Yr Pensioner at $2 rate**
81	**50 Yr Pensioner at $4 rate**
82	**Pensioner@$2rate -prior 01/01/93**
83	**Pensioner ReInstated @ $2 rate**
84	**Pensioner@$4rate -after 12/31/92**
85	**Pensioner Reinstated @ $4 rate**
86	**Deceased Active Member**
87	**Deceased $2 Pensioner**
88	**Deceased $4 Pensioner**
92	**Suspended $2 Pensioner**
94	**Suspended $4 Pensioner**
96	**W/D $2 Pensioner**
97	**W/D $4 Pensioner**

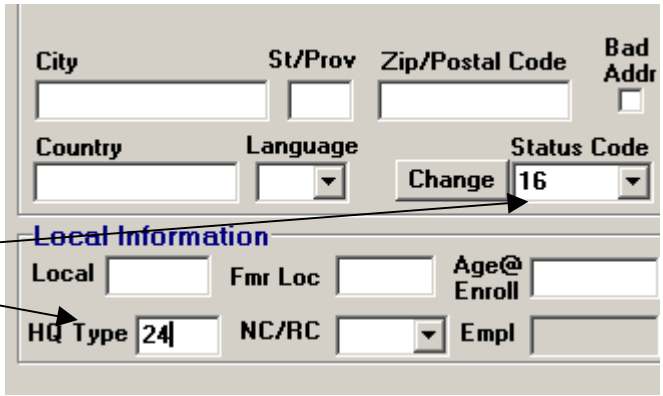
Note: *Italics are Local Use Only*, **Bold are codes required to produce correct HQ Reporting.**

ATU – MUMS/2000 - Fee Payer Notes

- SSN Changes: Report SSN Change on White Sheet next to Name Changes, use same indicator to determine that it needs to be reported and clear it automatically when MonthEnd is CLOSED.

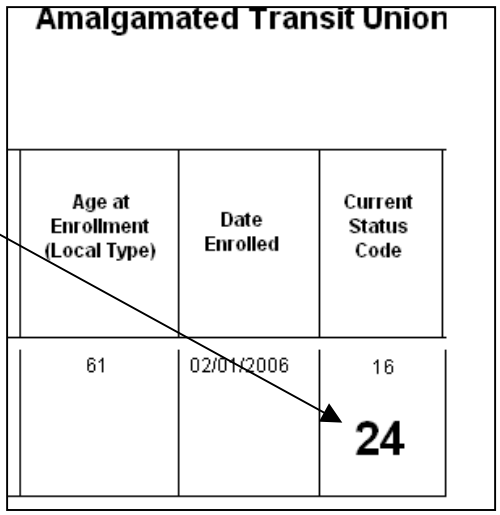


- New Fee Payers: When adding a new record via 11 or 16 or reinstatement of a 13, allow users to put 20,24,25,26 into field called "HQ Type" to denote Fee Payer status.

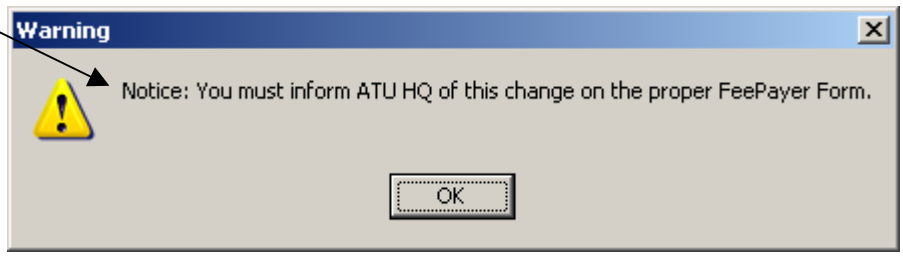


- When printing the Pink Sheet display this Fee Payer Status boldly so ATU HQ can process it.

  When MonthEnd is CLOSED change 11,13,16 to this Fee Payer code instead of a 10.



- When changing a person from a 10 to a 20,24,25 or 26 issue a warning to alert the local to fill out the proper paper work. This change will NOT appear on any computer generated report.



SAMPLE

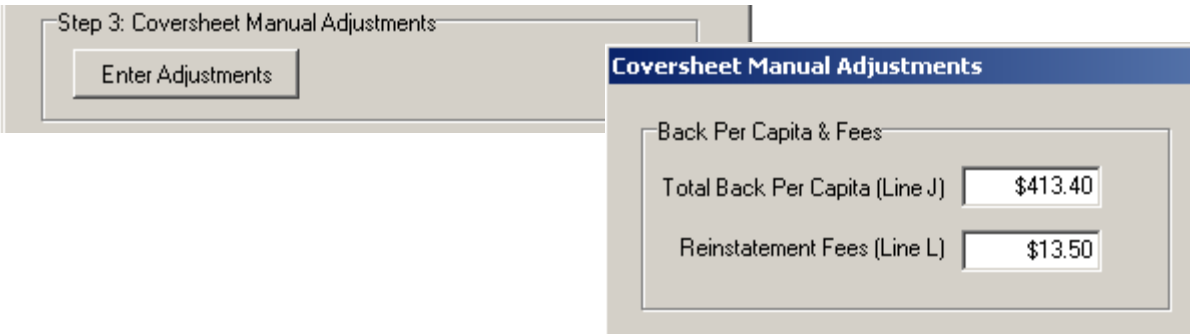
ATU Back Per Capita Taxes & Fees Worksheet

Amalgamated Transit Union Local: *3000* **for Month of:** *February 2005*

Member	From	To	Total Months	PerCap Rate	Sub Total	Total	Reinstate Fees
Fawn Ramos	*6/04*	*6/04*	*1*	*9.30*	*9.30*		
	7/04	*1/05*	*7*	*9.45*	*66.15*	*75.45*	
Jimmy Johnson	*4/04*	*6/04*	*3*	*9.30*	*27.90*		
	7/04	*1/05*	*7*	*9.45*	*66.15*	*94.50*	*5.00*
Elvis Presley	*5/04*	*6/04*	*2*	*9.30*	*18.60*		
	7/04	*1/05*	*7*	*9.45*	*66.15*	*84.75*	
Jack Johnson	*9/03*	*6/04*	*10*	*9.30*	*93.00*		
	7/04	*1/05*	*7*	*9.45*	*66.15*	*159.15*	*8.50*

Enter Following into Month-end Step #3 – Manual Adjustments…

Total Back Per Capita Taxes (Line J)	*413.40*
Total Reinstatement Fees Due (Line L)	*13.50*



NOTE: The following page can be Xeroxed and used each month as a worksheet.

ATU Back Per Capita Taxes & Fees Worksheet

Amalgamated Transit Union Local: _________ for Month of: _________________

Member	From	To	Total Months	PerCap Rate	Sub Total	Total	Reinstate Fees

Enter Following into Month-end Step #3 – Manual Adjustments…

Total Back Per Capita Taxes (Line J)	
Total Reinstatement Fees Due (Line L)	

MUMS/2000 FAQ VIDEO LESSONS
(www.MUMS2000.com/lessons)

MUMS/2000 FAQ Video Lessons

For clearer resolution after clicking a lesson button below, change to 720p in bottom right corner and optionally full screen.

Lesson	User Manual Reference	Run Time
Lesson 1 - Officer Overview	MUMS handout for ATU Presidents	3min 49sec
Lesson 2 - Look-up Member Names	Reference Manual Chapter 4, pages 1-4	2min 32sec
Lesson 3 - From Tables to Samples to Practice	Reference Manual Chapter 2, page 11	2min 05sec
Lesson 4 - Backup of MUMS	"Purple" Highlights Manual, page 2	2min 00sec
Lesson 5 - Status Code Change button	MUMS Practices & Procedures, page 7	2min 40sec
Lesson 6 - Address & Name Changes	MUMS Practices & Procedures, page 6	2min 00sec
Lesson 7 - Withdrawals & Suspensions	MUMS Practices & Procedures, pages 7 & 8	2min 54sec
Lesson 8 - Adding New Person	MUMS Practices & Procedures, pages 7 & 8	3min 12sec
Lesson 9 - Pension to / from	MUMS Practices & Procedures, pages 7 & 8	2min 06sec
Lesson 10 - Closing ATU Monthend - Part 1	MUMS Practices & Procedures, pages 11 & 12	3min 45sec
Lesson 11 - Closing ATU Monthend - Part 2	MUMS Practices & Procedures, pages 11 & 12	2min 57sec
Lesson 12 - Per/Capita Tax changes	Written instructions from ATU HQ	2min 00sec
Lesson 13 - Resolve your counts vers ATU counts	Call for support	2min 00sec
Lesson 14 - Members List by where they work	Reference Manual Chapter 7, page 16	5min 25sec
Lesson 15 - Members Roster by where they live	Reference Manual Chapter 7, page 17	4min 10sec
Lesson 16 - Labels of Members by where they live	Reference Manual Chapter 7, pages 22 & 23	4min 25sec
Lesson 17 - External Organizing suggestions	President's Handout, pages 3 & 13	3min 50sec
Lesson 18 - Grievances using MUMS	President's Handout, pages 15 & 16	4min 44sec
Lesson 19 - Political Action suggestions	President's Handout, page 14	5min 15sec
Lesson 20 - Tracking COPE contributors	Reference Manual Chapter 4, pages 14 & 15	2min 22sec
Lesson 21 - Creating Job Title codes	Reference Manual Chapter 2, pages 39 & 40	3min 53sec
Lesson 22 - Quick Report as 'Dictionary'	Reference Manual Chapter 7, pages 1-4	2min 43 sec
Lesson 23 - Getting Started with MUMS	http://www.mums2000.com	2min 49sec