# Local Union Information System
# LUIS
# Instructions and Information

*Prepared by UAW Accounting Department*

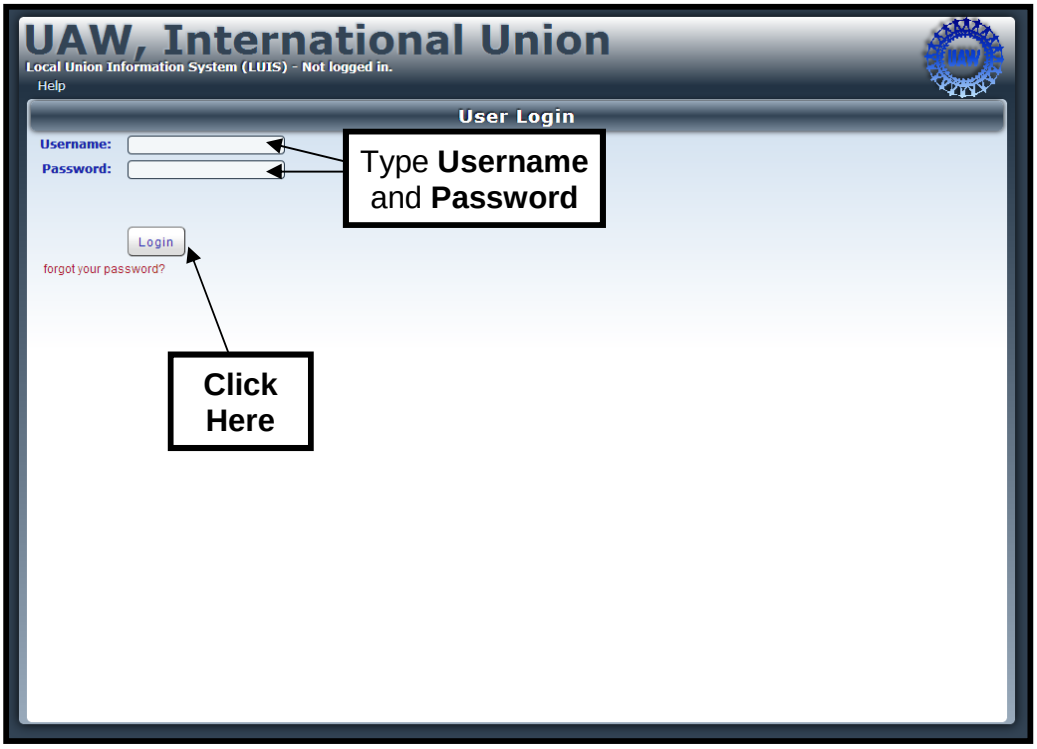
*opeiu494*

## Contents

# Logging into the LUIS System

## To access the Local Union Information System (LUIS) go to https://localunion.uaw.org

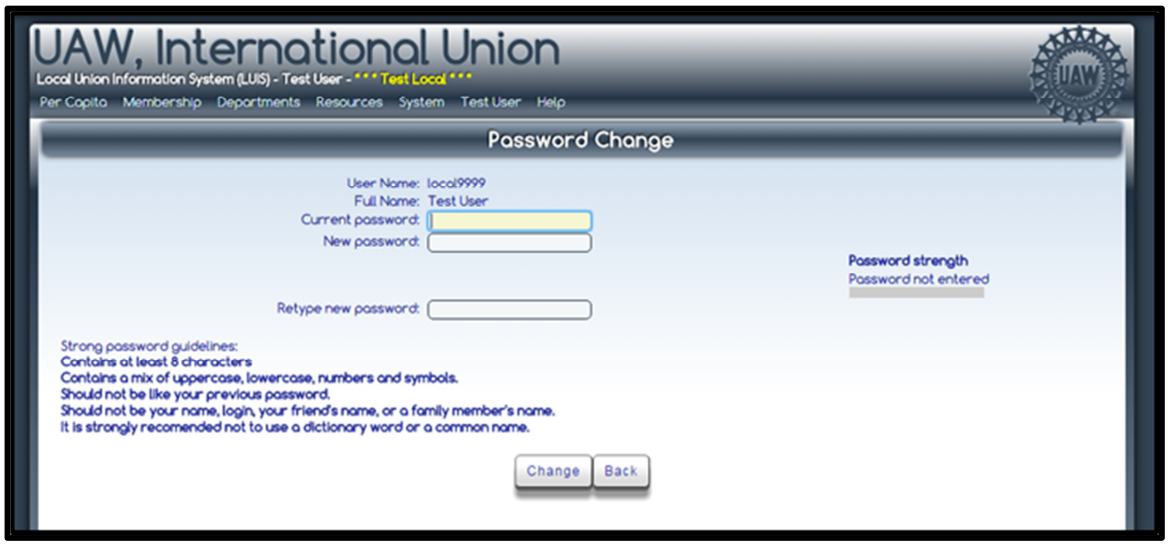
From the **User Login** page, locate the **Username** and **Password** boxes.




1. Type in the unique **Username** provided in the **Welcome Email** received from the International.
   **Remember this is case sensitive and you MUST enter exactly as in the email you received**.
2. Type in the temporary **Password** provided in the additional email received from LUIS.
   **Remember this is case sensitive and you MUST enter exactly as in the email you received**.
3. Click the **Login** button or press the **Enter** key on your keyboard. The **Password Change** screen will appear.

**Note: If you have trouble logging in please contact the Help Desk at 313-926-4485 for assistance.**

After the first login, the system will prompt you to change your password.  Passwords must be at least 8 characters in length and include both alpha and numeric characters without spaces or symbols.



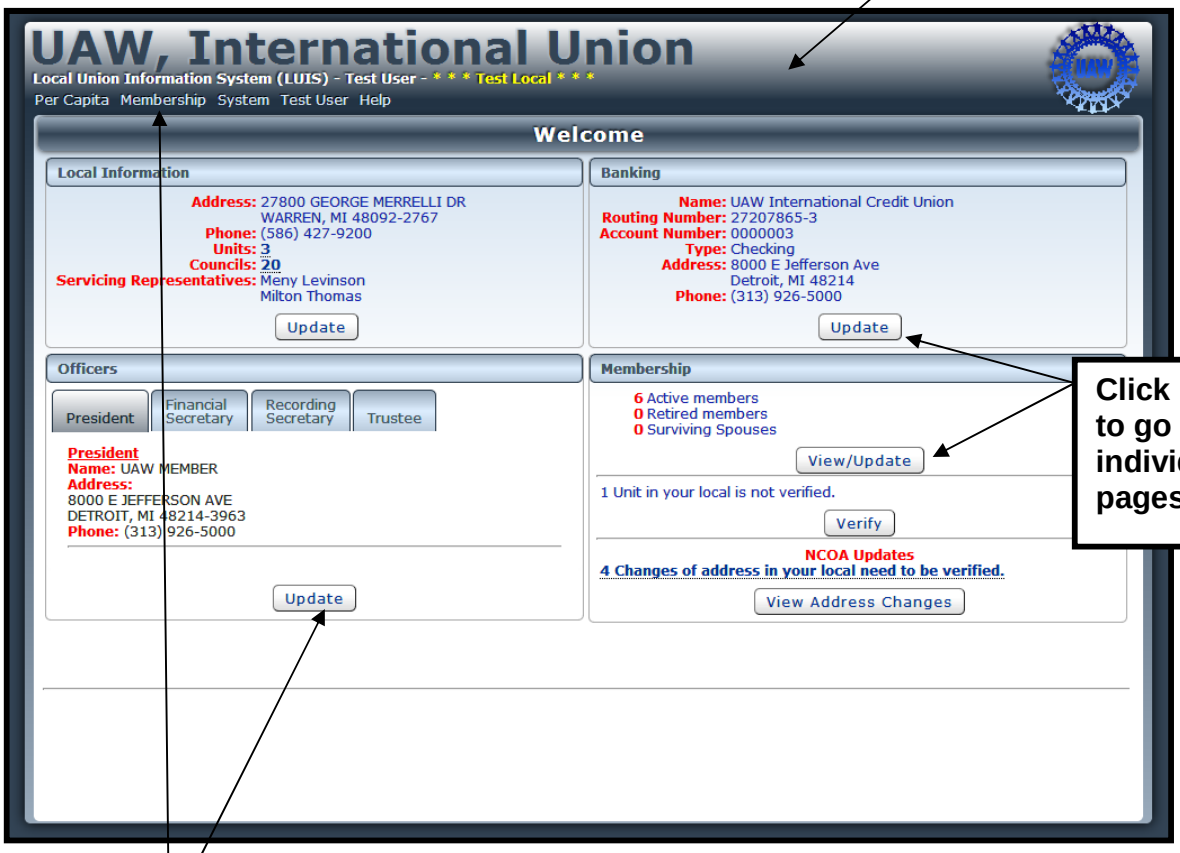

1. Enter the password provided in the Welcome Email in the box titled, **Current password**.
2. Enter a new password in the **New password** space.
3. Re-enter the new password in the **Retype new password** space.
4. Press enter or click on the **Change** button, and a message will appear stating "The record was processed."
5. Click on the **Click here to continue** to go to the **Welcome** page**.**

# General Information and Initial Setup

## *Welcome Page*

After logging in, the system directs you to the Welcome page as shown below. This page is a snapshot of the various selections available within the system. From this page you can access all sections of the system. Also, throughout the system clicking on the **UAW, International Union** banner located at the top of the screen will return you to the **Welcome** page. For additional help please contact the LUIS Help Desk at 313-926-4485, via email at luishelp@uaw.net or Contact Us located under the help menu for assistance with the system.

Click on the **UAW, International Union** banner to return to the **Welcome** page.




**Click here to go to individual pages.**

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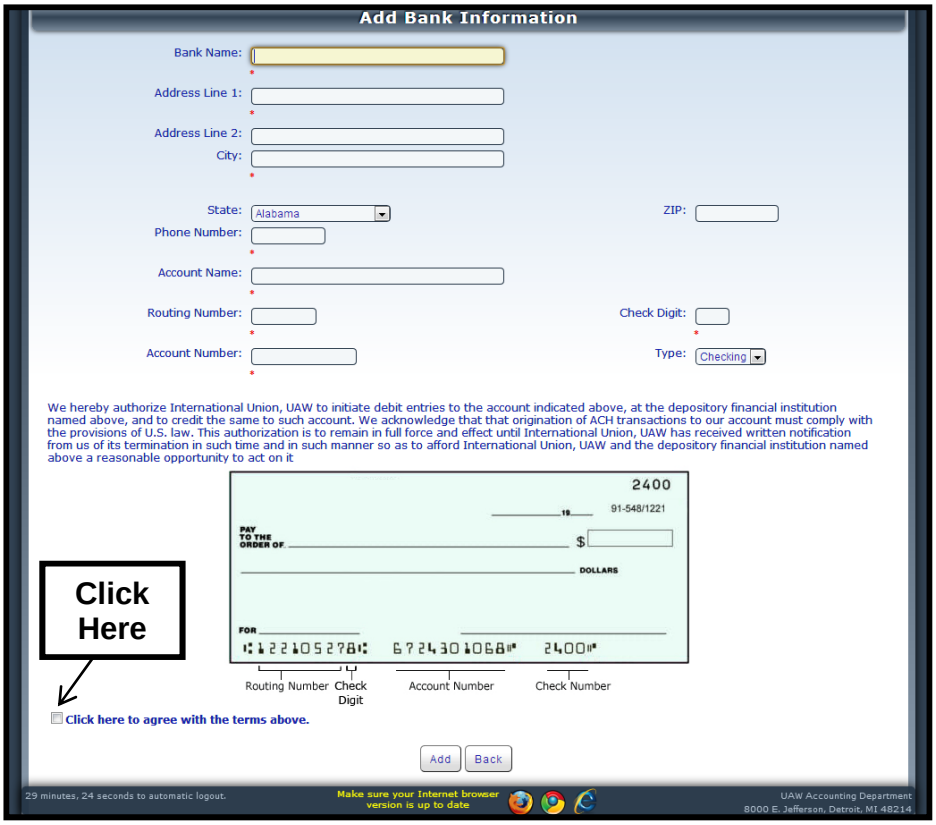
## *Banking Information*

One of the important pieces of information the system needs during the first login is the locals banking information. When you see the red error message under the **Banking** dashboard tab, you should enter the local banking information, such as name of bank, address, routing number and account number.

### Entering Banking Information for the First Time

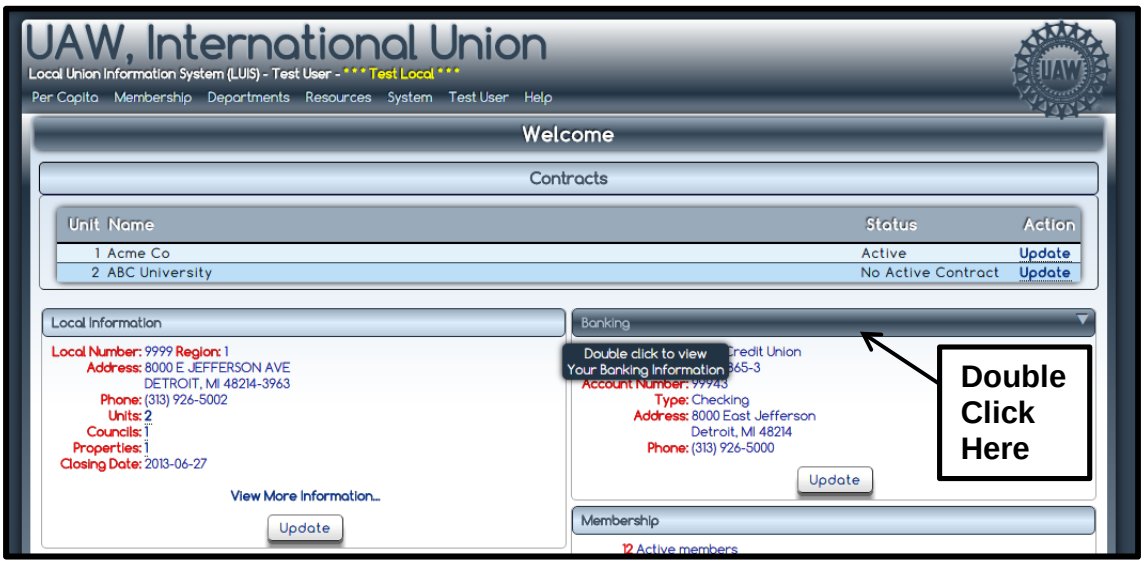

Click on the **Click here to fix** tab under the **Banking** banner. The **Add Bank Information** screen will appear.



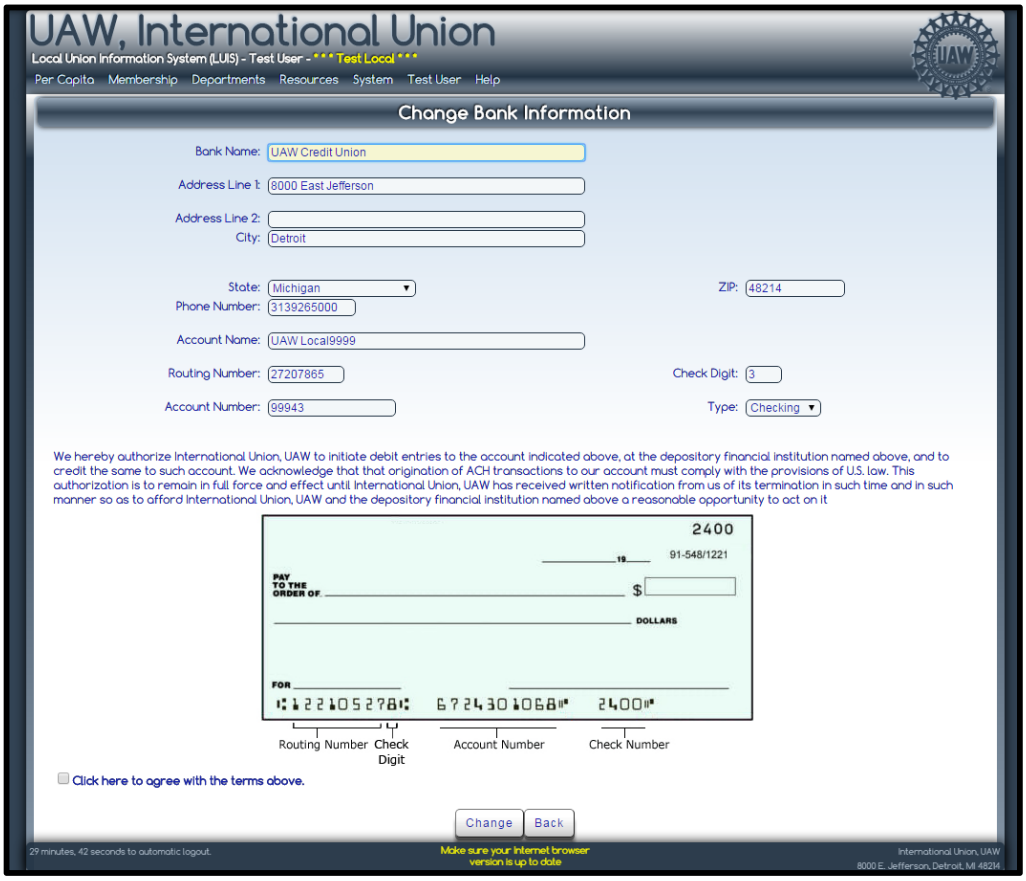

1. Enter the local's bank name.
2. Enter the banks full address and phone number.
3. Enter the account name **(this is what is on the top left of the check)**.
4. **Enter the first 8 digits of the banks routing number under the Routing Number.**
5. **Enter the last or 9th number of the banks routing number in the Check Digit area.**
6. Enter the bank account number.
7. Read the **Authorization Statement** and click on the check box to accept the terms.
8. Click on the **Add** button, and you will see a message stating "The record was processed".
9. Click on the **Click here to continue** to go back to the **Welcome** page**.**

## Changing Banking Information

Changing banking information requires you to be at the **Welcome** page.



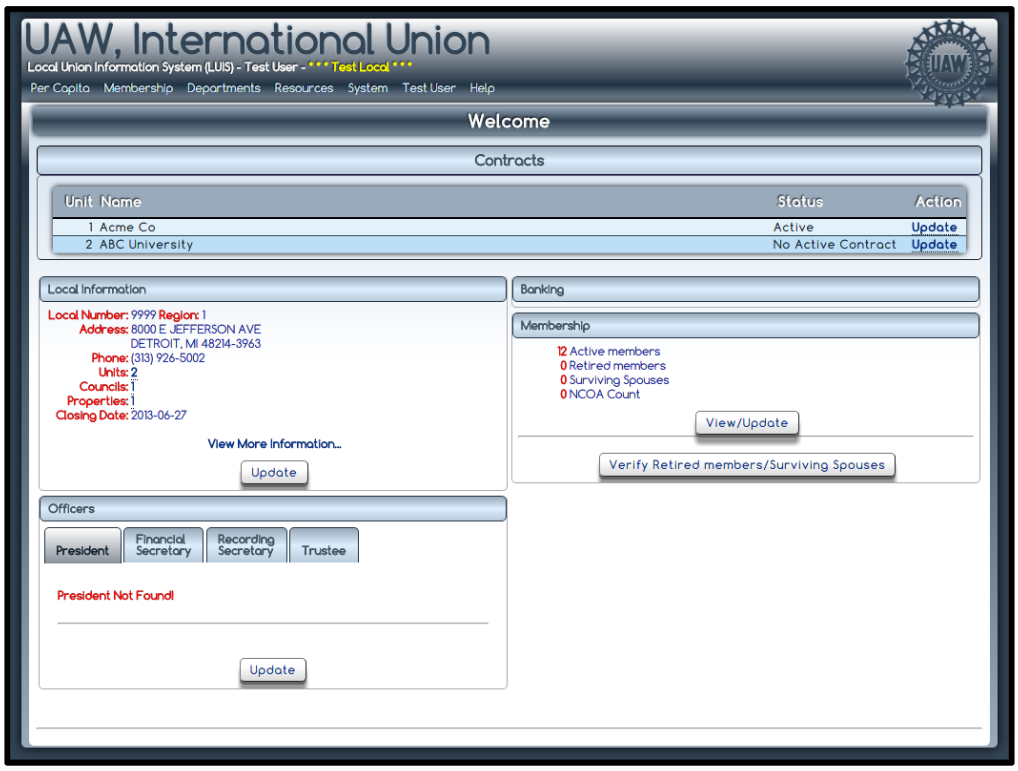

1. Double Click on the **Banking** title to expand the view.
2. Click **Update** and the **Change Bank Information** screen will appear.



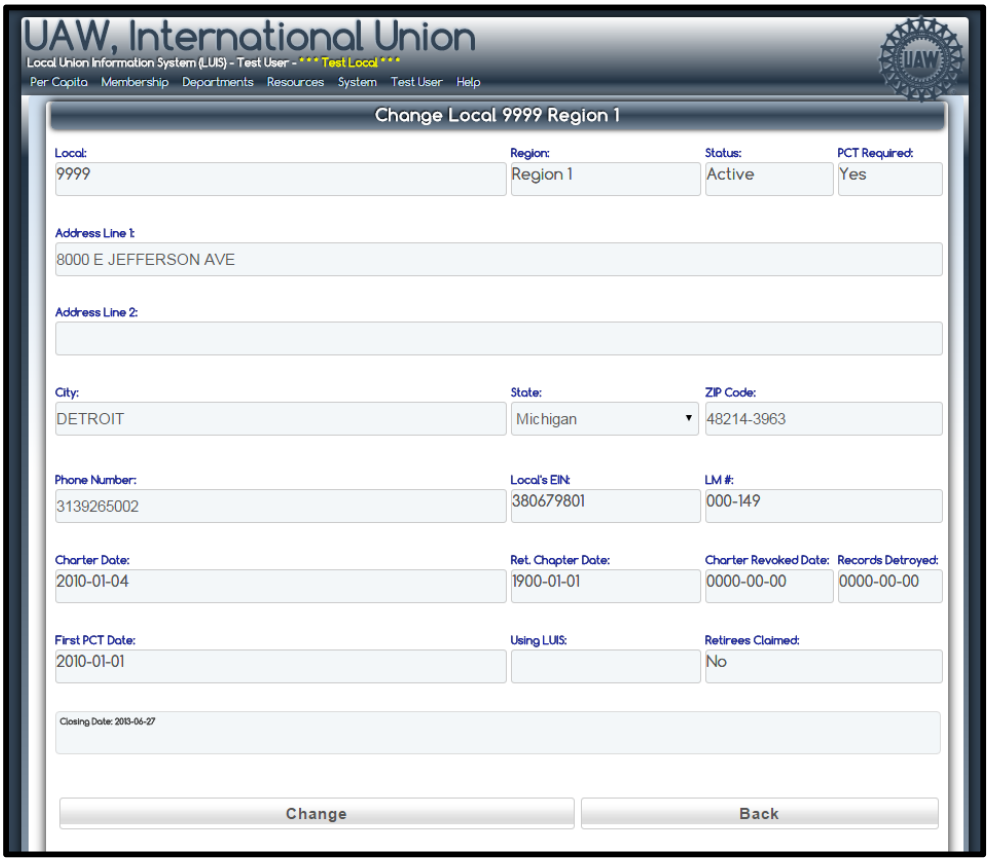

1. Change the appropriate information.
2. Read the **Authorization Statement** and click on the check box to agree with the statement.
3. Click on the **Change** button, and you will see a message stating “The record was processed.”
4. Click on the **Click here to continue** to go back to the **Welcome** page.

## *Changing Local Information*

From the **Welcome** page the local union address information may be changed. This change will automatically update LUIS, and notify the appropriate departments at the International of the change.



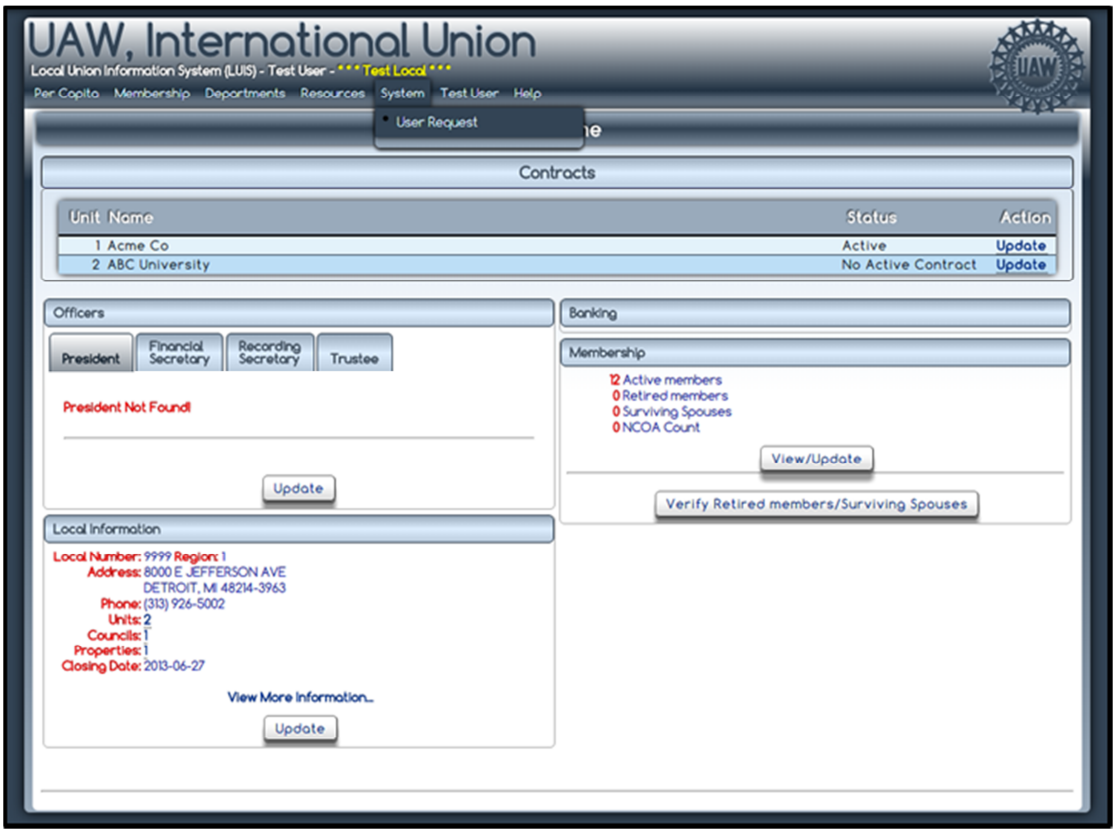

1. From the **Welcome** page click on the **Update** tab under the **Local Information** banner. The **Change Local Number** page will appear.




2. Make changes to the address and/or phone number as needed.
3. Click on the **Change** button to process the change, and you will see a message stating “The record was processed.”
4. Click on the **Click here to continue** to go back to the **Welcome** page.

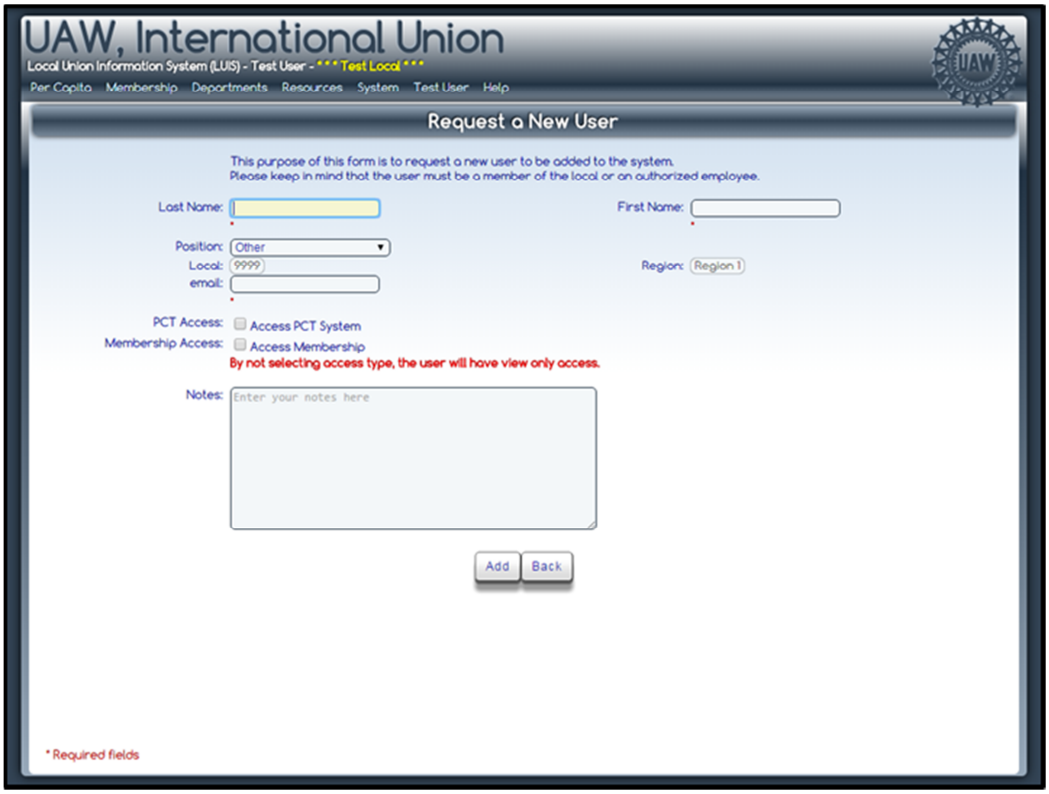
## *Requesting an Authorized User in LUIS*

The Local Union President and Financial Secretary are responsible for providing the name and email address of each individual who they authorized to access the system. It is important to remember that the system contains banking information for the Local Union. Since this information can be viewed or changed by authorized Per Capita Tax users, the Local should give careful consideration to deciding who will be an authorized Per Capita Tax user.




1. Click on the **User Request** tab under the **System** menu to be directed to the **Request a New User** page.

   **Please Note:** This is only to be used to add new users to the system. If you are unable to log in to an existing account for any reason please email luishelp@uaw.net or call 313-926-4485 for help.




2. Enter the new users **Last Name**.
3. Enter the new users **First Name**.
4. Choose the position of the person to be added.
5. Verify the Local and Region is correct.
6. Enter the email address for the new user.
7. Identify what area of the system the new user will have access to:
    a. **PCT** access will allow the user access to banking information and the ability to enter and see monthly PCT entries.
    b. **Membership** access will allow the user to view and modify all membership and officer information, but they will not be able to view or access banking information or PCT entries.
    c. By NOT selecting either **PCT** or **Membership** access the new user will have **view only access**, allowing the user to upload contracts and view units but no membership information.
8. Enter specific notes that may be helpful for a unique situation.
9. Click on the **Add** button, and a message stating “The record was processed” will appear.
10. Click on the **Click here to continue** this will take the user back to the **Welcome** page**.**

## *Local Union Officer Information*

From the **Welcome** page, changes on local union officers can be made. Both additions of new officers or changes on existing officers are done on this screen. This change will automatically update the officer information and eliminates the need to separately forward the change to the UAW.

### Adding a New Officer


1. From the **Welcome** page, click on the **Officers** tab under the **Per Capita** menu or click **Update** under the **Officers** banner to be directed to the **Work with Officers** screen.


2. On the **Work with Officers** screen, click the blue plus at the top or **Add New** at the bottom of the page. The **Add an Officer** screen will appear.


3. Click on the magnifying glass icon to search for the UAW ID, the **Lookup a Member** box will appear.


4. Enter the **Last Name** and **First Name** for the member and click **Search**.
   **Please Note:** An individual must be listed as a member in the LUIS system before he/she can be added as an officer.
5. Click **Select** next to the name of the member that should be added.


6. Once the name is selected the **UAW ID** will automatically be filled in.
7. Press the tab key to automatically have the member's name and address entered into the fields.
8. Choose **Active** from the **Status** drop down menu.
9. Choose the correct officer title from the **Title** drop down menu.
10. Enter the effective date from the drop down calendar.
11. Enter the member's phone number.
12. Enter the member's email address.
13. Click **Add** to add the new officer, and you will see a message stating "The record was processed."
14. Click on the **Click here to continue** to go back to the **Work with Officers** screen.

Repeat steps 1-14 as needed to add officers.

# Changing Local Union Officer Information


1. From the **Work with Officers** screen find the officer that needs information changed.
2. Under the **Actions** banner choose either:
   a. **Change** - to update an address change that was made in the membership area or to change the phone number or email address.
   b. **Deactivate** – to inactivate the officer.


3. Click on **Change** to complete the changes, and you will see a message stating "The record was processed."
4. Click on the **Click here to continue** to go back to the **Work with Officers** screen.

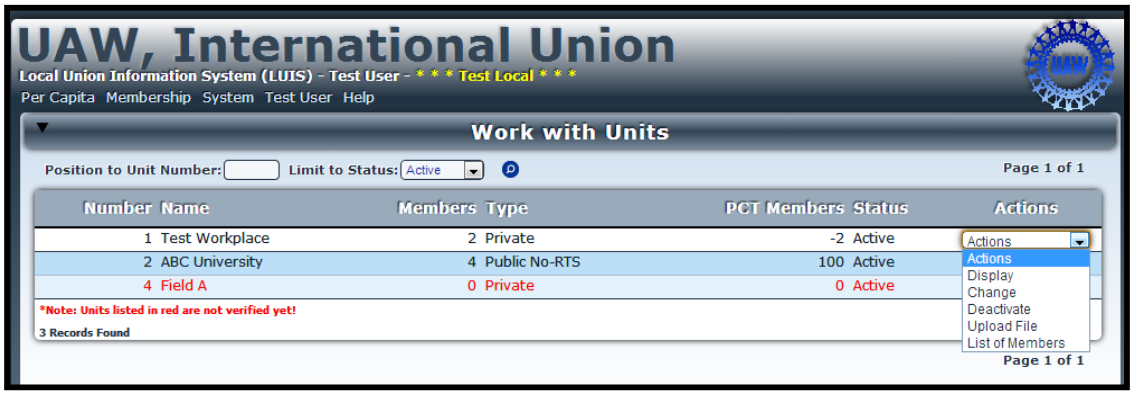
**Please Note:** The only change that can be made by the local is to the address, phone and email. **For name or title changes a new officer must be created and the old officer should be inactivated.**

## *Units*

You may only change an existing unit name, address or status through LUIS. **If a unit needs to be added, please contact your International Representative.**

## Changing an Existing Unit


1. From the **Welcome** page click the **Units** tab under the **Per Capita** menu. The **Work with Units** page will appear.



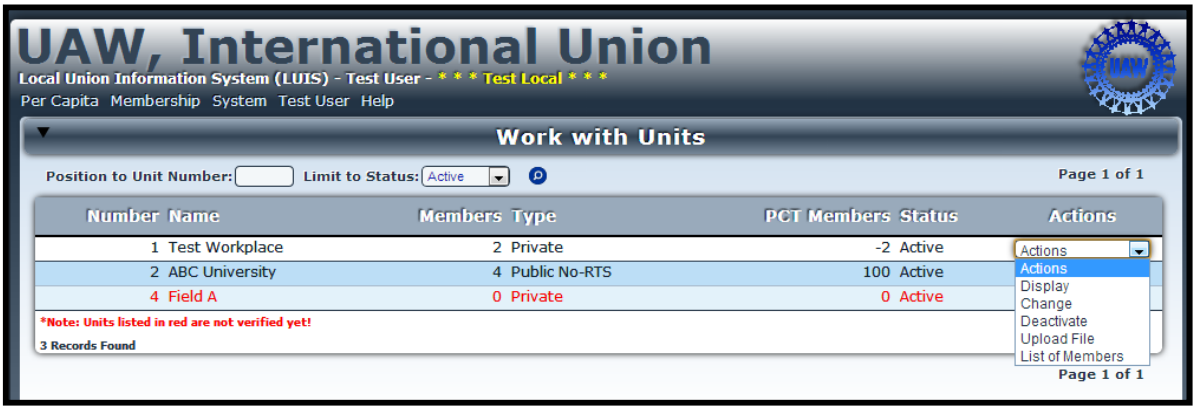

2. From the **Work with Units** page click on the **Change** option under the **Actions** banner, the **Change Unit** page will appear.


3. In this screen change name, address, or phone number.
4. Enter the reason for the change.
5. Click the **Change** button, and a message stating “The record was processed” will appear.
6. **Click here to continue** to go back to the **Work with Units** screen.

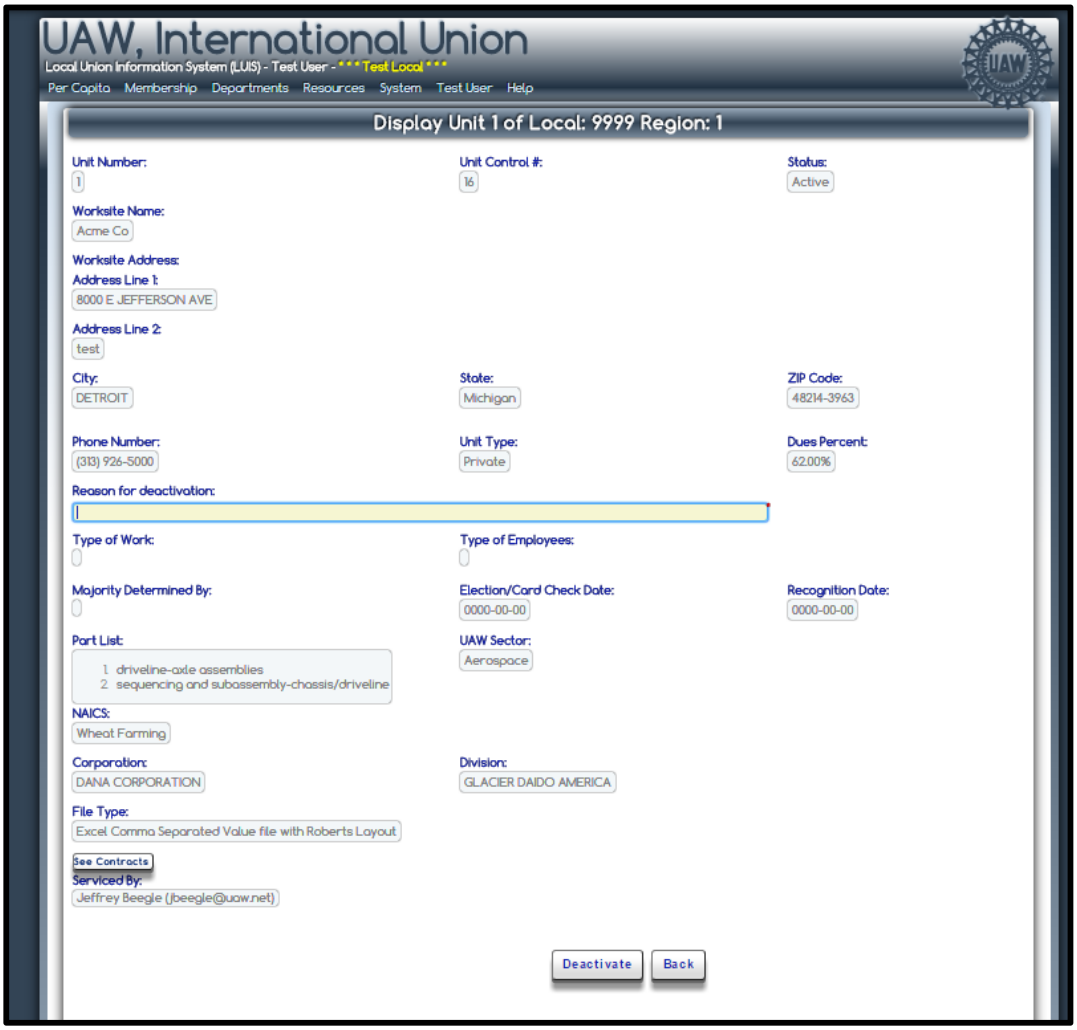
Repeat steps 1-6 for each unit as changes are needed.

# Deactivating an Existing Unit


1. From the **Welcome** page click the **Units** tab under the **Per Capita** menu. The **Work with Units** page will appear.




2. From the **Work with Units** page click on the **Deactivate** option under the **Actions** banner, the **Display Unit Number** page will appear.




3. On the **Display Unit** screen type the reason the unit is to be deactivated.
4. Click the **Deactivate** button, and a message stating “The record was processed” will appear.
5. **Click here to continue** to go back to the **Work with Units** screen.

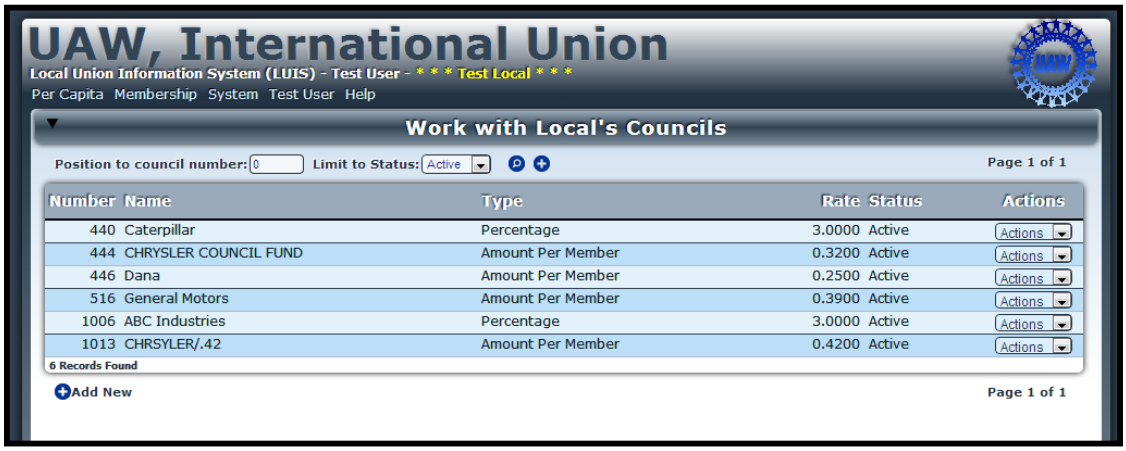
Repeat steps 1-5 for each unit as deactivations are needed.

## *Councils*

You may add or inactivate councils through the system as needed. The council must be added to the LUIS system in order for the local to pay council dues on the electronic per capita tax page.

### Adding a New Council


1. From the **Welcome** page, click the **Councils** link under the **Per Capita** menu. The **Work with Locals Councils** page will appear.




2. Click on the **plus** sign at the top or **Add New** at the bottom of the page to enter a new council, the **Add a Council** page will appear.


3. Choose the council the local wants to add from the drop down **Council** menu.
4. Choose **Active** under the **Status** menu.
5. Click **Add** to add the council, and you will see a message stating “The record was processed.”
6. **Click here to continue** to go back to the **Work with Locals Council** screen.

Repeat steps 1-6 as needed to add councils.

# Changing an Existing Councils Status


1. From the **Welcome** page, click the **Councils** link under the **Per Capita** menu. The **Work with Locals Councils** page will appear.


2. From the **Work with Locals Councils** page click on the **Change** option under the **Actions** banner, the **Change Council Number** page will appear.


3. Choose **Inactive** from the **Status** drop down menu.
4. Click on the **Change** button to inactivate the council, and you will see a message stating “The record was processed.”
5. **Click here to continue** to go back to the **Work with Locals Councils** screen.

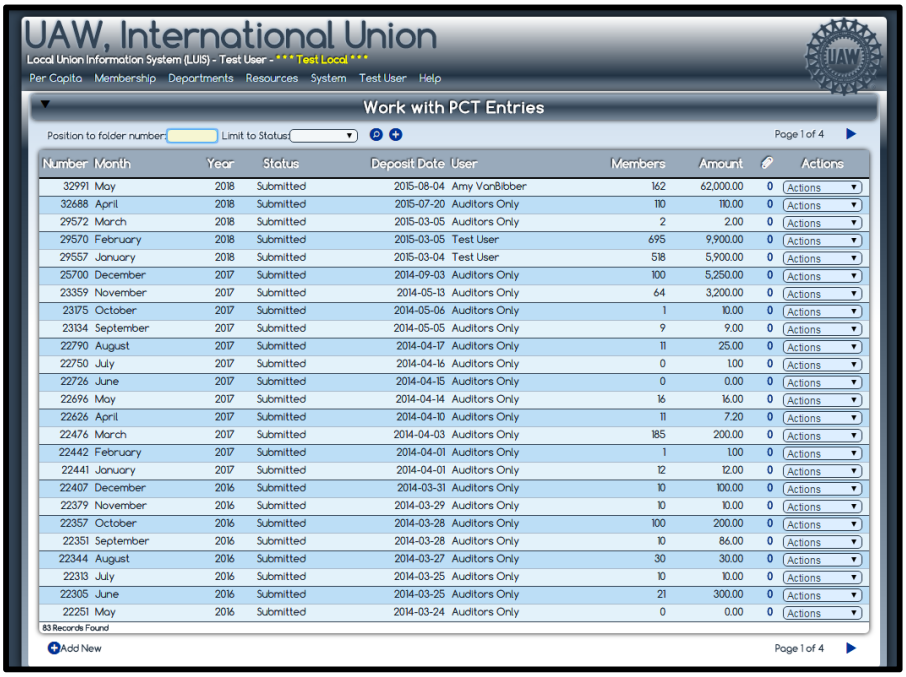
Repeat steps 1-5 as needed to inactivate councils.

# Per Capita Tax Entries

Inputting the monthly PCT data is a two-step process. Step one is to create an "entry" for the monthly per capita. Think of this as a folder that is created to gather the month's per capita data. This folder entry identifies the dues month the local is submitting. Step two, is to enter data (membership and dues) for that month into the monthly folder entry. You will be able to enter all types of dues and fees into the system, as well as review calculations before you submit payments. The following pages will explain how to enter specific dues types and fees.

## *Adding a New Monthly Folder Entry*


1. To enter **all** Per Capita Tax or PCT entry details, start on the **Welcome** page and click on the **PCT Entries** option under the **Per Capita** menu. The **Work with PCT Entries** screen will appear.

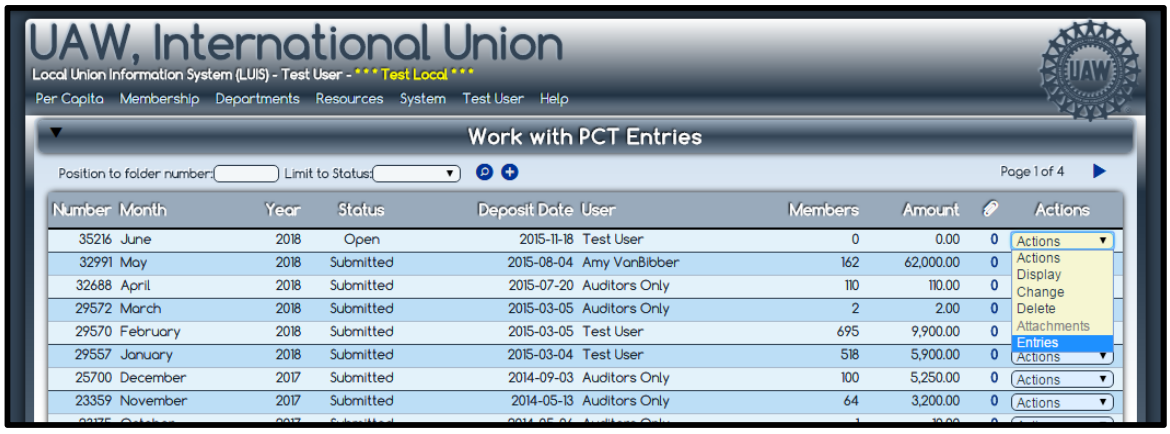



2. Click on the plus sign at the top or **Add New** at the bottom of the page to enter a new month. The **Add a New Entry** screen will appear.

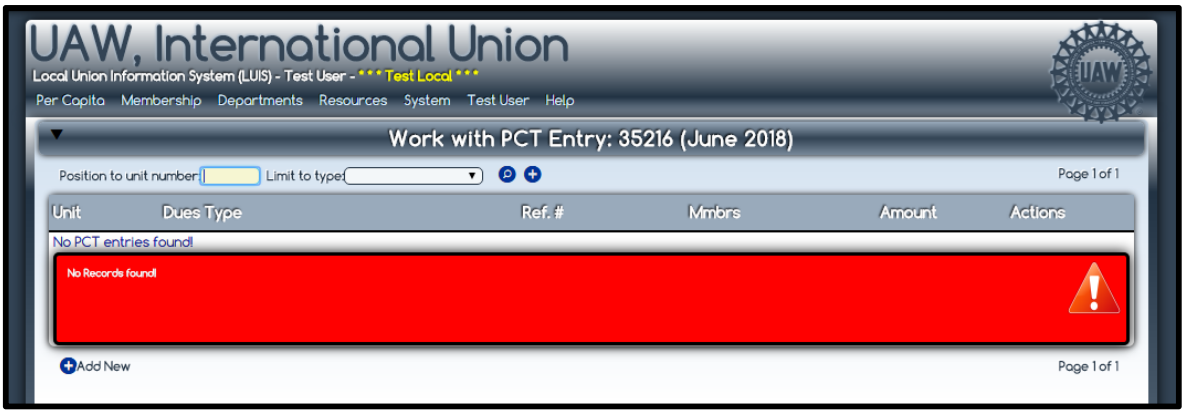

3. The system automatically updates to the next month that is due for your local. The month and year will automatically display, and the local may not change this. If there are no dues to pay for this month, please see the **No Dues Received** entry section.
4. Add any notes to the note section that may be needed or reviewed for that month. The local should use the **Notes** box on this screen to make notation of any unique issues related to the monthly per capita entry.
5. Click **Add** and you will see a message stating "The record was processed."
6. **Click here to continue** to go back to the **Work with PCT Entries** screen.

## *Adding Detailed Dues Information*

Once a monthly "folder" entry has been created, the system is ready for the dues detail entries. You will now enter the detailed information for each active unit, including membership totals and dues amounts. The following pages will instruct you on how to enter all dues types and details.




1. To enter dues details click on the **Entries** located under the **Actions** banner on the **Work with PCT Entries** page, the **Work with PCT Entry: xx** screen will appear.




2. Click on the plus at the top or **Add New** at the bottom of the **Work with PCT Entry :xx** page to add dues details, the **Add Dues Detail** screen will appear.

**The following pages will instruct you on all types of dues entries available for use.**

## Entering Regular Dues Types (Including Agency Fee Payers, Bonus, Private, Public, or Sub Dues)

By action of the 36th Constitutional Convention in June 2014, Article 16 was amended to increase dues. The dues increase is effective with the first regularly scheduled payroll deduction for dues beginning November 1, 2014.

**Dues deducted on or after November 1, 2014 are subject to a different dues calculation than dues deducted prior to November 1, 2014.** Therefore, it is important that the local identifies whether the dues being entered were deducted prior to November 2014, by contacting the help desk at 313-926-4485 for assistance in entering any dues **deducted** prior than November 2014.


1. Choose the unit from the **Unit** drop down menu.
2. Choose **Regular Dues** from the **Detail type** drop down menu.
3. Choose the appropriate dues type from the **Type of dues** drop down menu.
4. Enter the number of members the local is reporting for this unit and dues type into the **Number of members** space.
5. Enter the total amount of dues the local *received* and is reporting for this unit and dues type into the **Amount** space.
   **Note: Do not round amounts. Enter the actual amount *received* in dollars and cents *before* refunds. Please refer to the Dues Refund section on entering refunds.**
6. Click on the **Add** button to add this detail. A message stating "The record was processed" will appear.
7. Click **Continue Entry** to go back to the **Add Dues Details** screen and continue to enter more dues.
8. **Repeat steps 1-8 until all dues details for each unit are entered for the month.**
9. Click **Done** when all dues detail entries have been completed, the **Work with PCT Entry** screen will appear.

# Entering Council Dues


1. Choose the unit from the **Unit** drop down menu that needs details entered.
2. Choose **Regular Dues** from the **Detail type** drop down menu.
3. Choose **Council** from the **Type of dues** drop down menu and press tab.
4. Choose the council from the **Council** drop down menu on the right side of the screen.

   **Please Note:** If the council does not appear in the drop down menu please refer to the **Adding a New Council** section of this manual.

5. For Councils that pay cents per member
   a. Enter the number of members reported for this unit into the **Number of members** space and press tab, the system will calculate the amount owed.
6. For Councils that pay a percent of dues
   a. Enter the number of members reported for this unit into the **Number of members** space.
   b. Enter the dues amount that was ***received*** in the **Amount** space and the system will calculate the amount owed and that total will be displayed on the review screen.

   **Please Note: Do not round amounts. Enter the actual amount reported in dollars and cents.**

7. Click on the **Add** button to add this detail, a message stating "The record was processed" will appear.
8. Click **Continue Entry** to go back to the **Add Dues Details** screen and continue to enter more dues details.
9. **Repeat steps 1-8 until all dues details are entered for the month.**
10. Click **Done** when all dues detail entries have been completed, the **Work with PCT Entry** screen will appear.

## Entering Initiation Fees

**Initiation Fees** are entered by selecting **Add Dues Detail** screen as explained in the section on **Adding Detailed Dues Information**.


1. Choose the unit from the **Unit** drop down menu that needs details entered.
2. Choose **Regular Dues** from the **Detail type** drop down menu.
3. Choose **Initiation Fees** from the **Type of dues** drop down menu.
4. Enter the number of members you are reporting for this unit and dues type into the **Number of members** space and press tab.

**Please note: The system will automatically calculate the $1.00 per member owed to the International.**

5. Click on the **Add** button to add this detail, and you will see a message stating "The record was processed."
6. Click **Continue Entry** to go back to the **Add Dues Details** screen and continue to enter more dues details.
7. **Repeat steps 1-6 until all dues details are entered for the month.**
8. Click **Done** when all dues detail entries have been completed, the **Work with PCT Entry** screen will appear.

## Entering Retirees Dues

**Retiree dues** are entered by selecting the **Add Dues Detail** screen as explained in the section on **Adding Detailed Dues Information**.


1. Choose **Regular Dues** from the **Detail type** drop down menu.
2. Choose **Retirees** from the **Type of dues** drop down menu.
3. Enter the number of members the local is reporting for this unit and dues type into the **Number of members** space.
4. Enter the amount of dues received into the **Amount** space.
5. Press Enter or click on the **Add** button to add this detail, and you will see a message stating "The record was processed."
6. Click **Continue Entry** to go back to the **Add Dues Details** screen and continue to enter more dues details.
7. **Repeat steps 1-6 until all dues details are entered for the month.**
8. Click **Done** when all dues detail entries have been completed, the **Work with PCT Entry** screen will appear.

## Entering Refunds for Agency Fee Payers, Bonus, Private, Public, or Sub Dues Types

**Refunds** are entered by selecting the **Add Dues Detail** screen as explained in the section on **Adding Detailed Dues Information**.


1. Choose the unit from the **Unit** drop down menu that needs details entered and press tab.
2. Choose **Refund** from the **Detail type** drop down menu and press tab.
3. Choose the appropriate dues type for the dues refund you are entering from the **Type of dues** drop down menu.
4. Enter the number of members the local refunded for this unit and dues type into the **Number of members** space.
5. Enter the total amount of dues you are refunding for this unit and dues type into the **Amount** space

   **Please Note: Do not round amounts. Enter the actual amount refunded in dollars and cents.**

6. Click on the **Add** button to add this detail, and a message stating "The record was processed" will appear.
7. Click **Continue Entry** to go back to the **Add Dues Details** screen and continue to enter more dues details.
8. **Repeat steps 1-8 until all dues details are entered for the month.**
9. Click **Done** when all dues detail entries have been completed, the **Work with PCT Entry** screen will appear.

## Entering No Dues Received and On Strike Detail Types

Entering a **No dues received** or **On strike** are added at the **Add Dues Detail** screen as explained in the section on **Adding Detailed Dues Information**.


1. Choose the unit from the **Unit** drop down menu that needs details entered.
2. Choose either **No dues received** or **On strike** from the **Detail type** drop down menu.

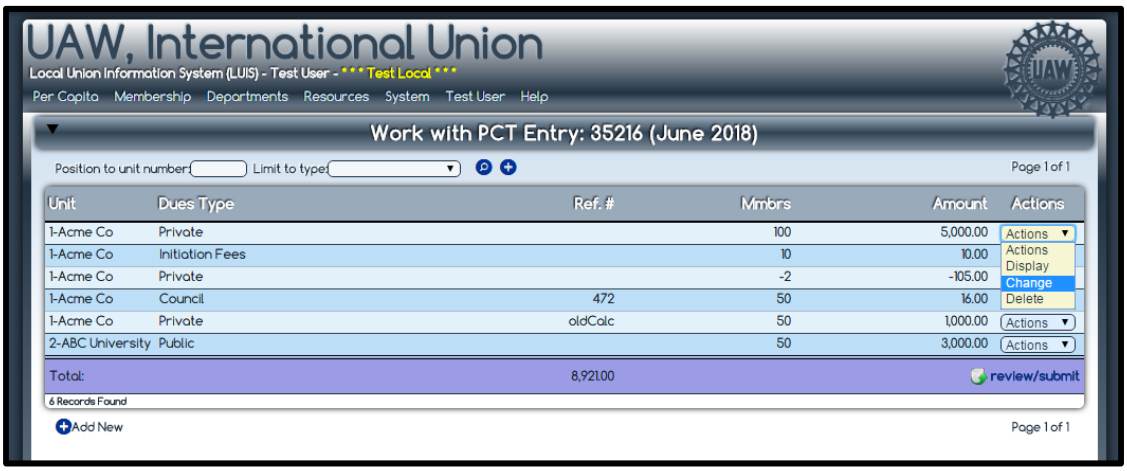
**Please Note: By selecting either of these options this indicates the local has NOT received any dues from the unit.**

3. Click on the **Add** button to add this detail, and a message stating “The record was processed” will appear.
4. **Repeat steps 1-4 until all dues details are entered for the month.**
5. Click **Done** when all dues detail entries have been completed, the **Work with PCT Entry** screen will appear.

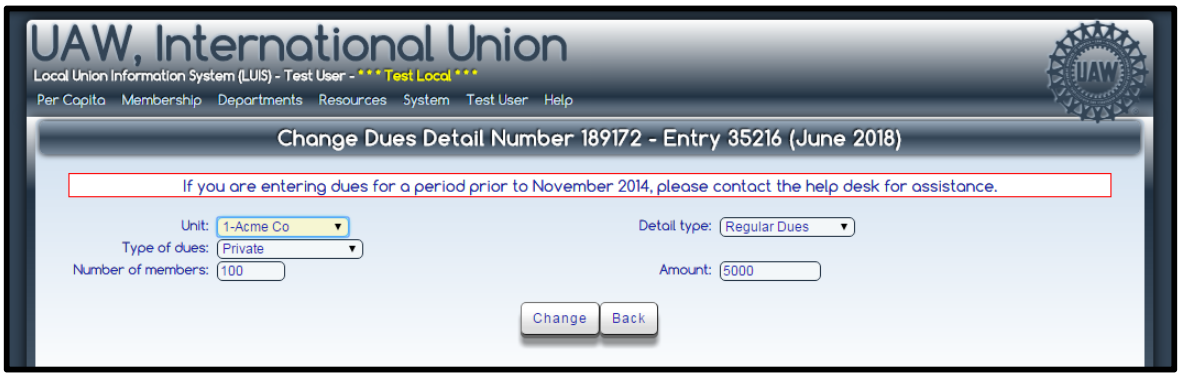
After details have been entered, a summary of the dues details will display on the **Work with PCT Entry** screen. At this point a review of individual details is available to make changes and/or delete them as necessary. You may also choose to complete and submit your monthly entry from this screen.

> **Please Note:** LUIS will display **oldCalc** for any dues that were deducted prior to November 1, 2014.

## Changing Dues Details



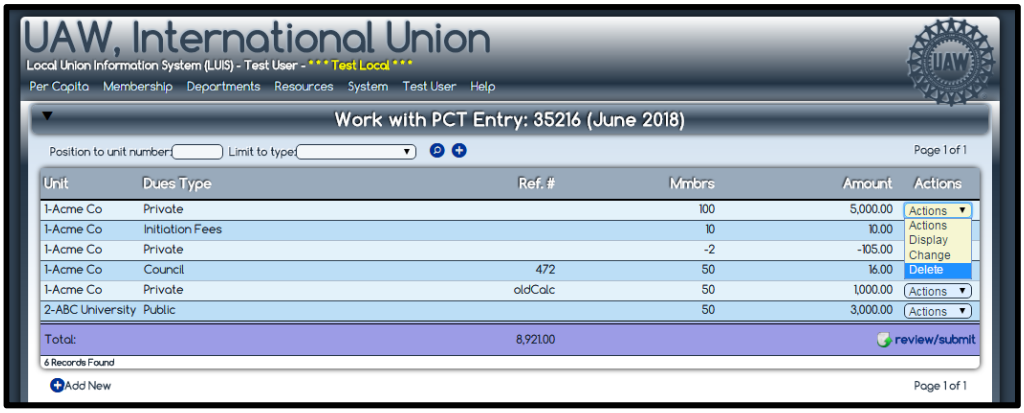

1. To change a specific dues entry click on the **Change** option under the **Actions** banner. This will take you to the **Change Dues Detail** screen




2. Make the changes needed for the specific detail that was chosen and click the **Change** button. A message stating "The record was processed" will appear.
3. **Click here to continue** and the **Work with PCT Entry** screen will appear.

Repeat steps 1-3 until all changes to details have been entered.

# Deleting Dues Details




1. To delete a specific dues entry click on the **Delete** option under the **Actions** banner. This will take you to the **Delete Dues Detail** screen.

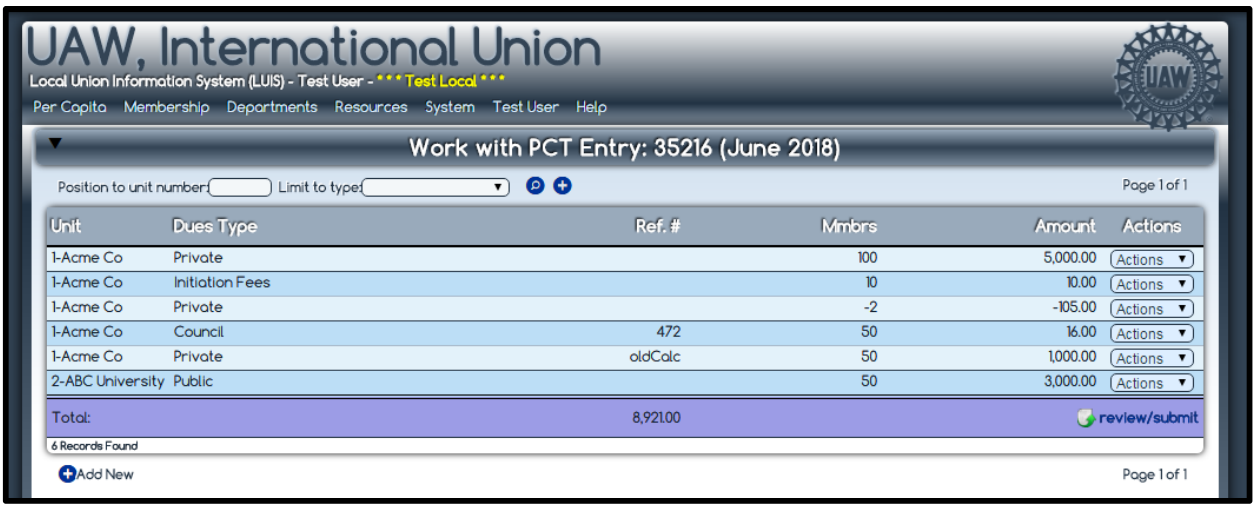

2. Verify this is the entry you want to delete and click on the **Delete** button. You will see a message stating "The record was processed."
3. **Click here to continue** and the **Work with PCT Entry** screen will appear.

Repeat steps 1-3 to delete entry details as needed.

## Submitting Completed Months

After you have reviewed and made any changes to the individual monthly details, you are ready to submit the payment and monthly entry to the International Union UAW.

**Please Note:** LUIS will display **oldCalc** for any dues that were deducted prior to November 1, 2014.




1. Click on the **review/submit** button at the bottom of the screen. This will take you to the final review and submit screen.

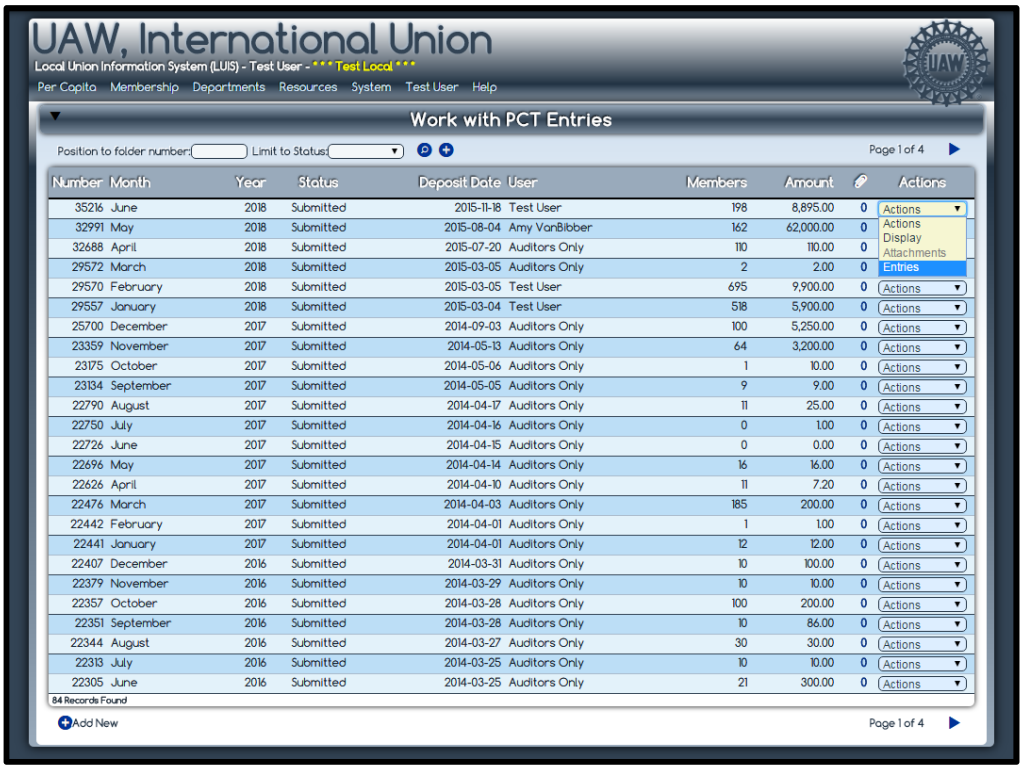
On this final review and submit screen you will see a summary of all members and dues detail calculations based on what you have entered for the month. You will also see the payment that is due to the International Union UAW and be able to submit it electronically. Please make sure you double check all calculations and payments before submitting.


2. Make a final review of the totals and payment due.
3. Click the **Click here to authorize an electronic payment of:….**
4. Click the **Submit** button to complete the month and authorize payment. You will see a message stating "The record was processed."

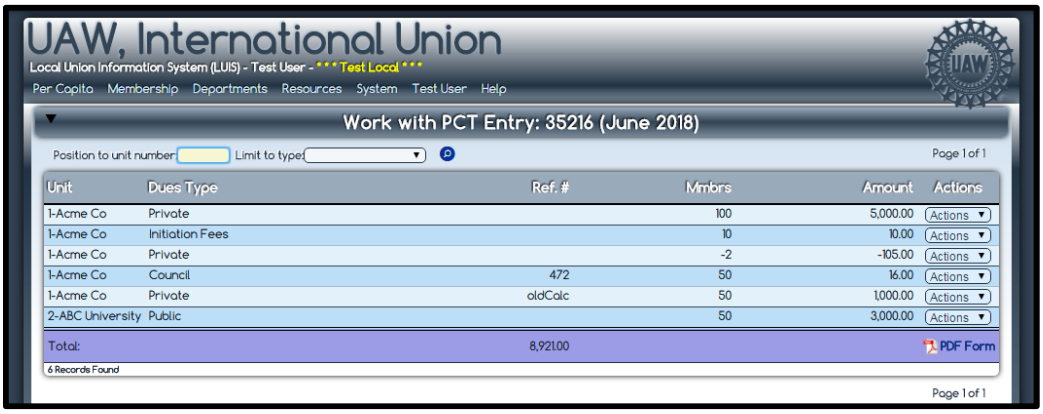
**Please Note: Once a month is submitted it cannot be stopped and the payment will be deducted within 24 to 48 hours. If an error is found after the month has been submitted please contact the International at 313-926-4485 for instructions on how to make corrections.**

# Printing a PDF File of the Submit Screen

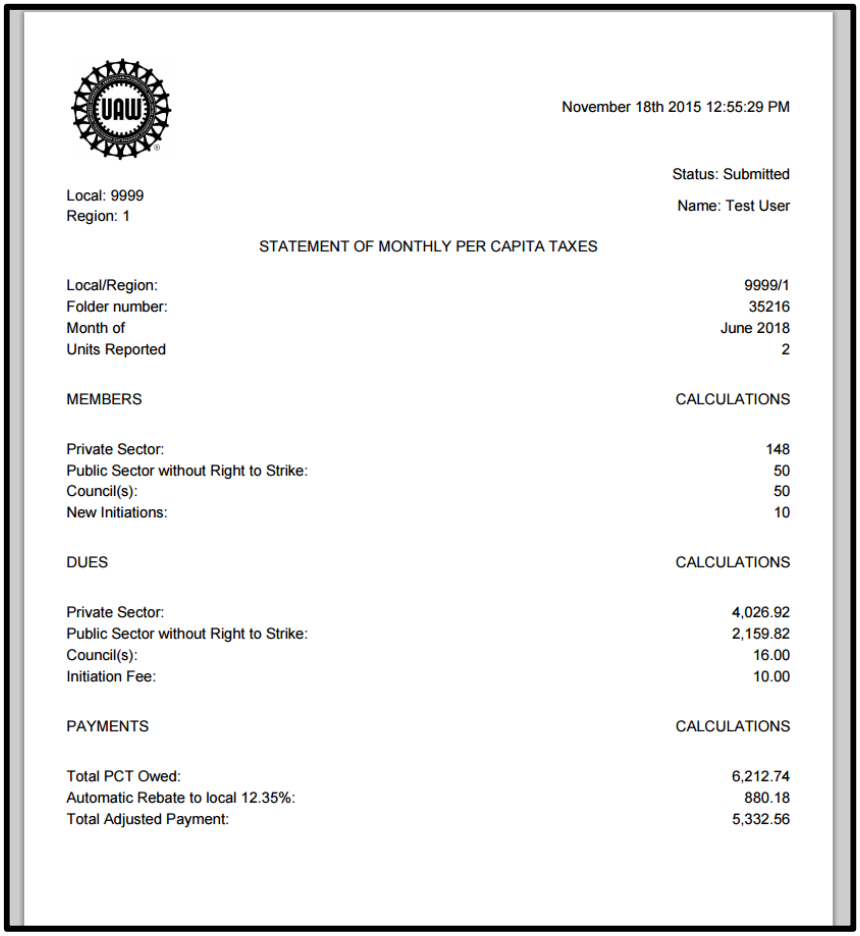
After you have submitted your monthly Per Capita Tax Payment, you are able to print and/or save a PDF file of the submission.




1. From the **Work with PCT Entries** screen, click on **Entries** under the **Actions** banner.
2. The **Work with PCT Entry** screen will appear.



3. Click on the **PDF Form** option and a PDF version of the submitted month will appear.



November 18th 2015 12:55:29 PM

Status: Submitted

Local: 9999
Region: 1

Name: Test User

STATEMENT OF MONTHLY PER CAPITA TAXES

| | |
|---|---|
| Local/Region: | 9999/1 |
| Folder number: | 35216 |
| Month of | June 2018 |
| Units Reported | 2 |

| MEMBERS | CALCULATIONS |
|---|---|
| Private Sector: | 148 |
| Public Sector without Right to Strike: | 50 |
| Council(s): | 50 |
| New Initiations: | 10 |

| DUES | CALCULATIONS |
|---|---|
| Private Sector: | 4,026.92 |
| Public Sector without Right to Strike: | 2,159.82 |
| Council(s): | 16.00 |
| Initiation Fee: | 10.00 |

| PAYMENTS | CALCULATIONS |
|---|---|
| Total PCT Owed: | 6,212.74 |
| Automatic Rebate to local 12.35%: | 880.18 |
| Total Adjusted Payment: | 5,332.56 |

4. From this view you may print a copy of the submission page or save it to a location on your computer. This page will show the date, time and user name for the submission, as well as the amount paid.

# Membership

## *Setting Up Your Membership for the First Time*

### Initial Verification of Membership

Before you can use the membership system, a current membership list must be set up for each unit in the local. This process is called the initial verification of membership, which allows the local to confirm that the membership information in the system is accurate. Your locals' full membership only needs to be verified one time. After the initial verification, you will only have to perform this step if a new unit is added to your local.

There are two methods available to verify your membership: 1) Upload a Membership File, or 2) Manually Verify Members by reviewing individual membership records.

### Upload a Membership File

For larger local unions, or those locals that receive membership data in an electronic format, this option allows the local to upload a file from its current membership software or from a company file. Big three locals should refer to the Supplemental Information posted under the Help Section on LUIS.

### Manually Verify Members by reviewing individual membership records

For smaller local unions, or locals that do not receive membership data in an electronic format, it may be more convenient to review individual membership records on a person-by-person basis. The membership records available under this option were converted from the UAWs prior membership system based on the last membership update submitted by your Local.

### Which Method Do I Use?

A local with only one unit can select either of the two methods listed above to verify its full membership list for the first time. Amalgamated local unions can select either option on a unit-by-unit basis, but once an option is selected for a particular unit, that option must be used to verify the entire unit.

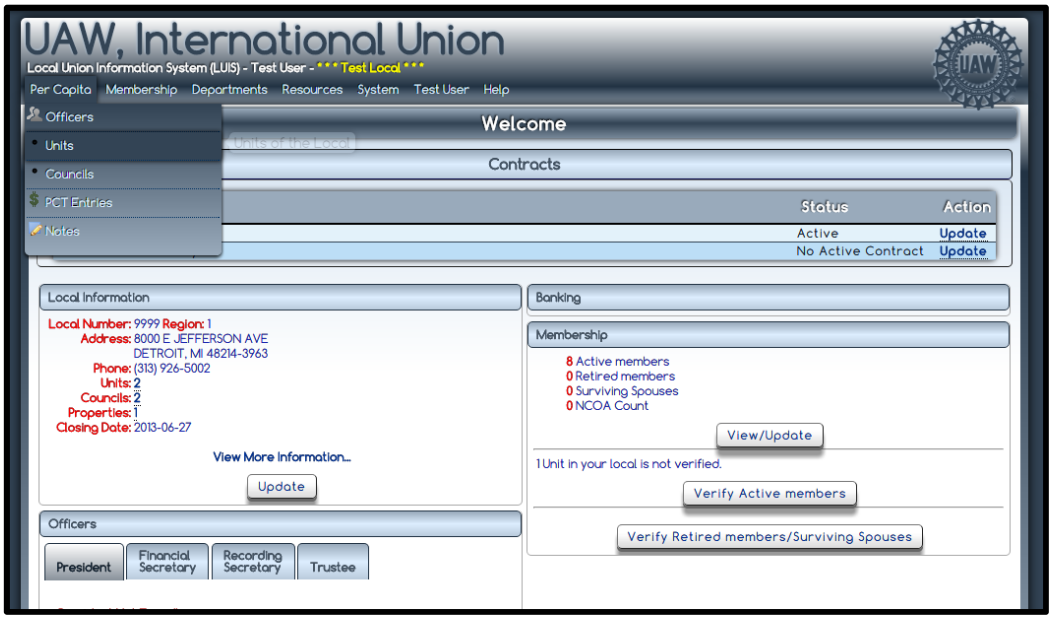
## *Verifying Your Locals Membership*

From the **Welcome** page, locate the **Membership** banner on the right side of the screen.

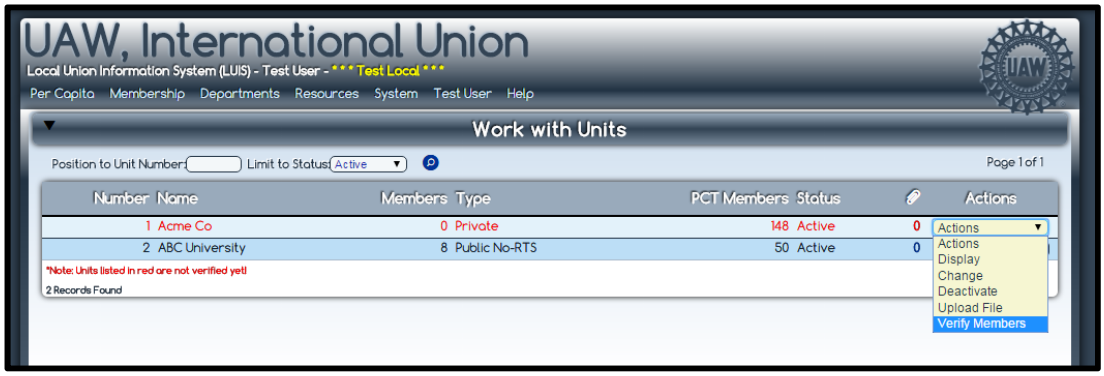
In the center of the **Membership** section will be a message indicating how many units of your local have not had the full membership verified for the first time. You do not have to verify your local's full membership in one session. You can begin verifying your membership, save your changes, and then return at a later time to finish.

Once you complete the verification process for your local or for a unit within your local, the **Membership** section on the **Welcome** page will be updated to reflect the members, and will remove that unit from the list of units that needs to be verified.

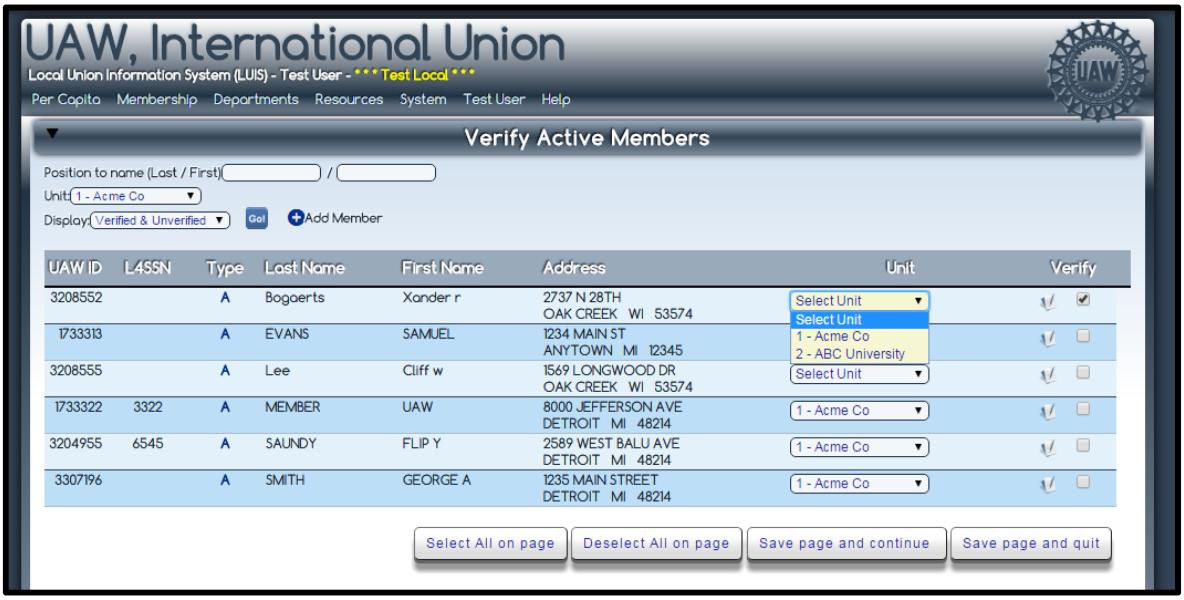
## Verify Members by Reviewing Individual Records



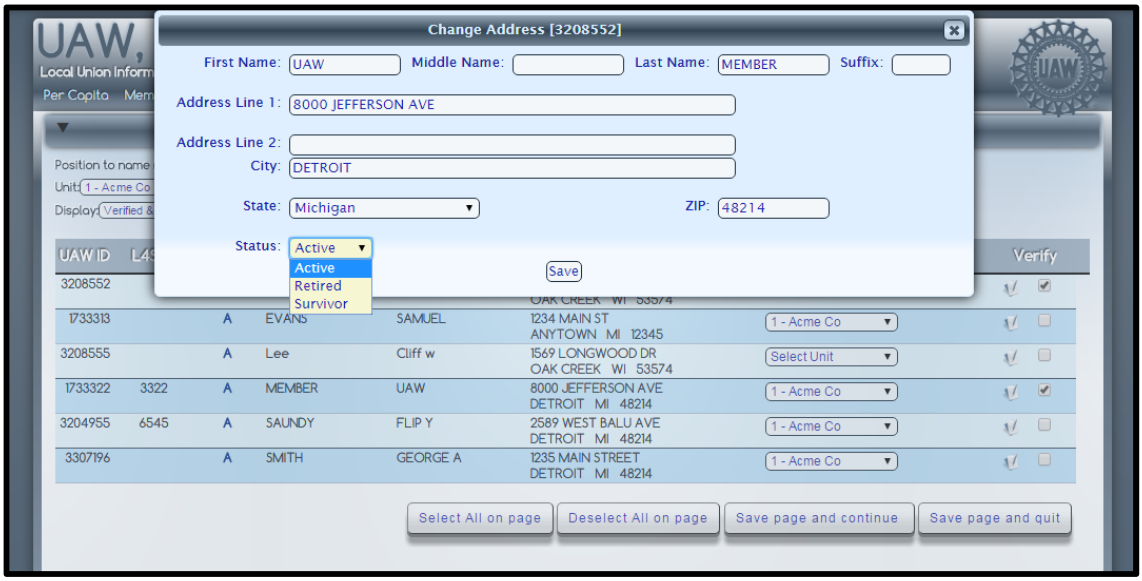

1. From the **Welcome** page click on **Units** under the **Per Capita** menu and the **Work with Units** screen will appear.




2. From the **Work with Units** screen select the unit you would like verify and click on the **Verify Members** option from the **Actions** drop down menu.
3. The **Verify Active Members** screen will appear.

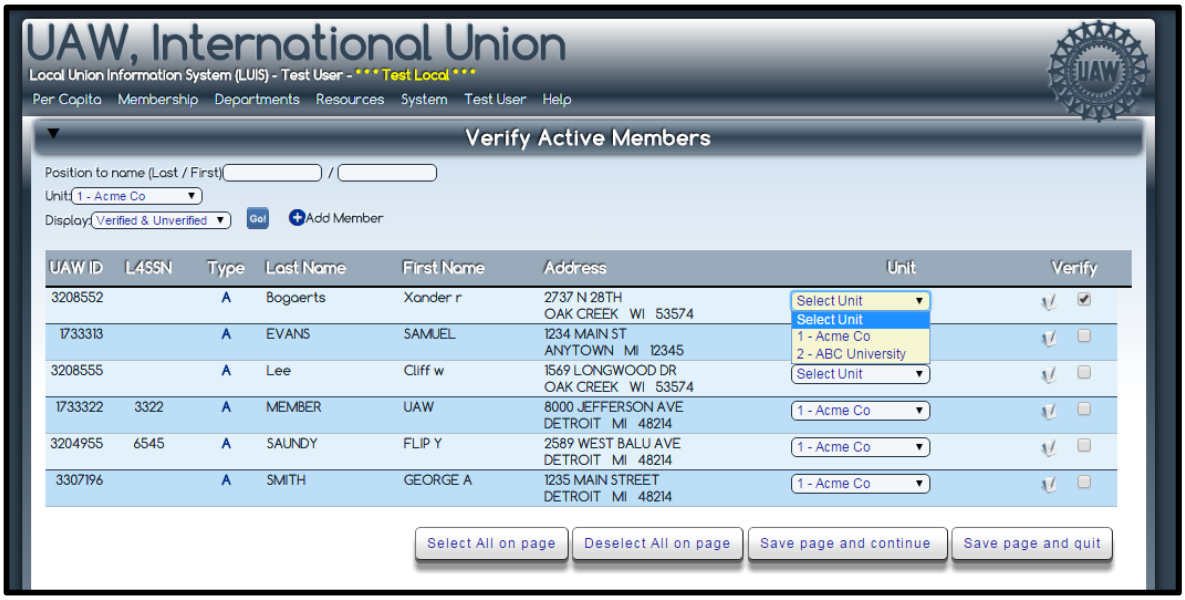



4. Click on the blank box under the **Verify** heading to the far right of each individual who should be included as a member of this unit or click **Select All on page** to select all members displaying on the current page. A check mark will appear in the box of each selected member.
5. Select the correct unit from the **Unit** drop down list.
6. If you need to change or edit a member's address, name, or status (i.e. - a member is showing active but is retired) click on the paper and pen icon located to the right of the members name and address. The **Change Address** pop-up screen will appear.



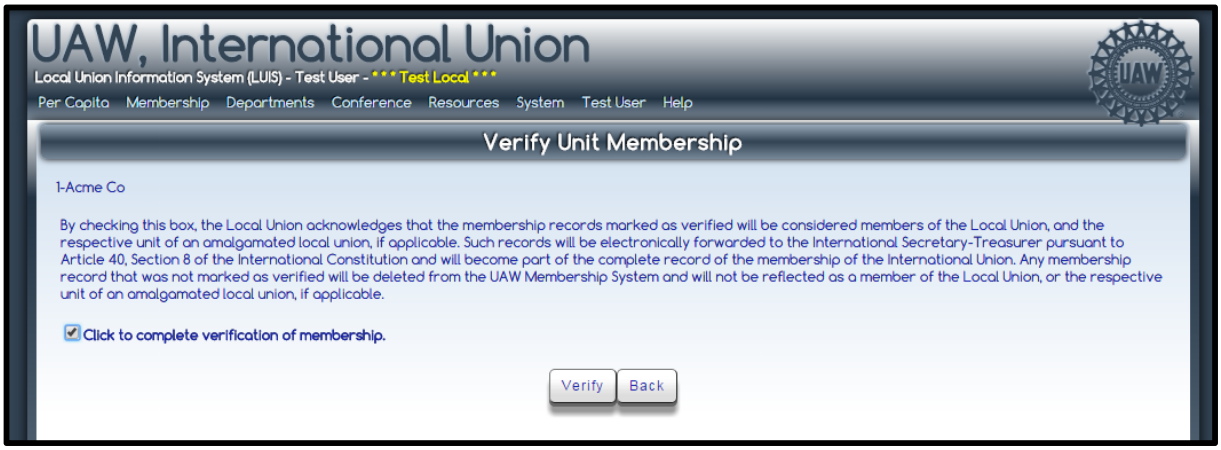

7. Edit the members name, address or status in the pop-up screen as needed.
8. After correcting the members information, click the **Save** button and the pop-up screen will close. When you click on the **Save** button at the bottom of the pop-up screen, any information that you changed will be saved to the system.

**Please Note: the changes you made will not appear until you are done verifying the unit**.




9. When you reach the bottom of the screen, click **Save page and continue** to move to the next page or **Save page and quit** to continue verification at a later time.
10. Repeat steps 4 through 9 above until you have reviewed the entire membership list for this unit.


11. When you have checked the **Verify** box next to each member that should be included in this unit, click on **Verification Complete** at the bottom of the screen. The **Verify Unit Membership** screen will appear.

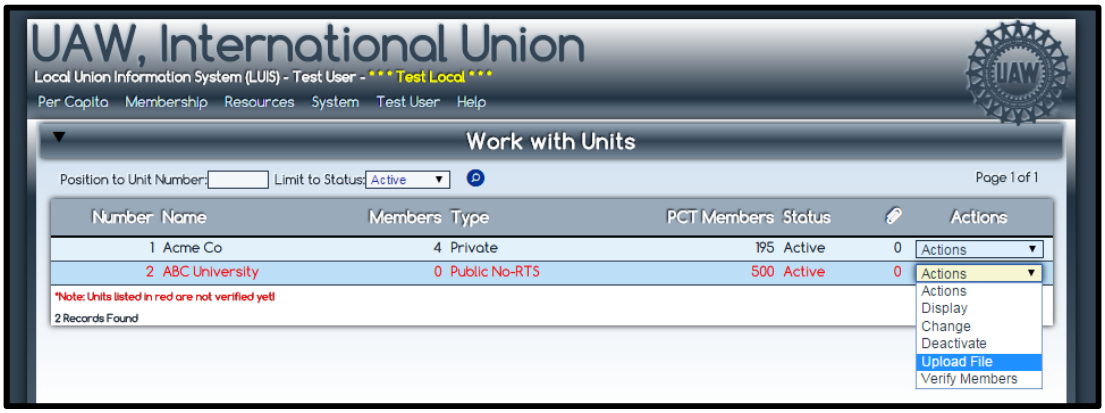



12. Check the blank box next to **Click to complete verification of membership**.
13. Click **Verify,** a message will appear indicating “The record was processed”.
14. Click on **Click here to continue** to return to the **Work with Units** screen.

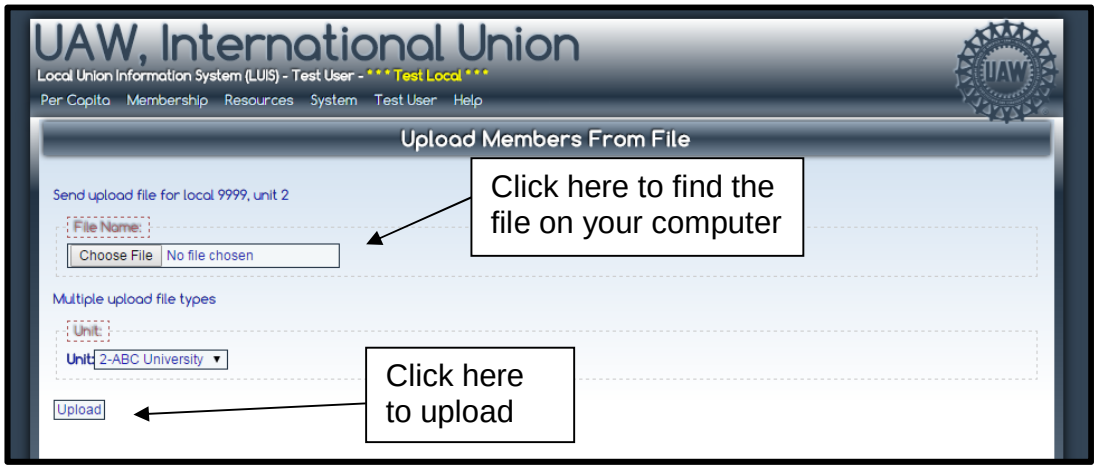
The member count will now reflect the number of members that were verified for the unit under the **Membership** banner on the **Welcome** page.

# Verify Members by Uploading a File


1. From the **Welcome** page click on **Units** under the **Per Capita** menu, and the **Work with Units** screen will appear.




2. From the **Work with Units** screen select the unit you would like to work with and click on the **Upload File** option from the **Actions** drop down menu. The **Upload Members From File** screen will appear.

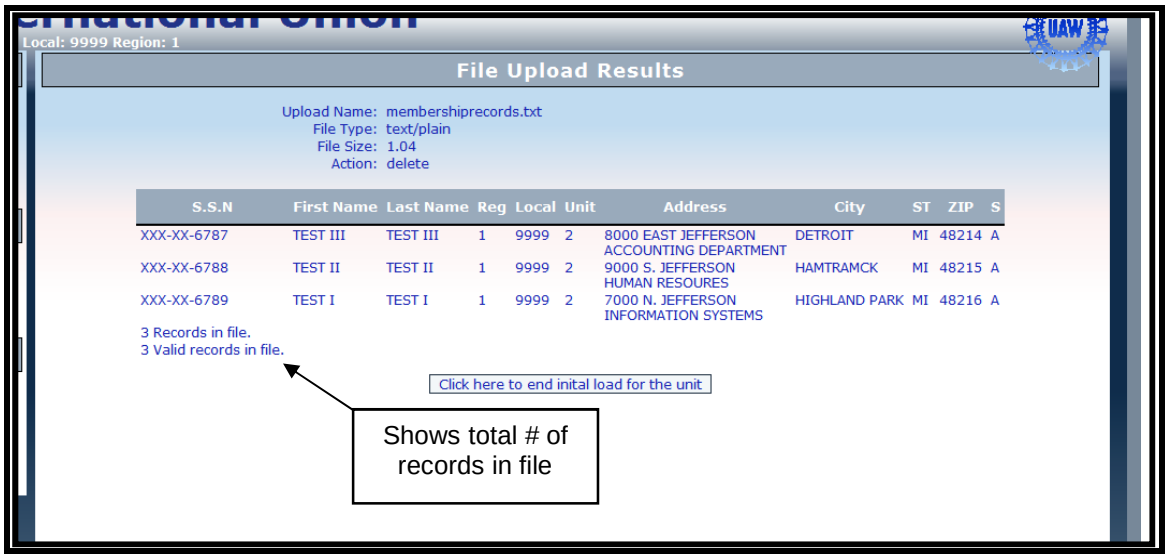



3. Click **Browse** to find your membership file. If your membership file contains membership information for multiple units, the system will upload the data for all units included on the file at the same time.

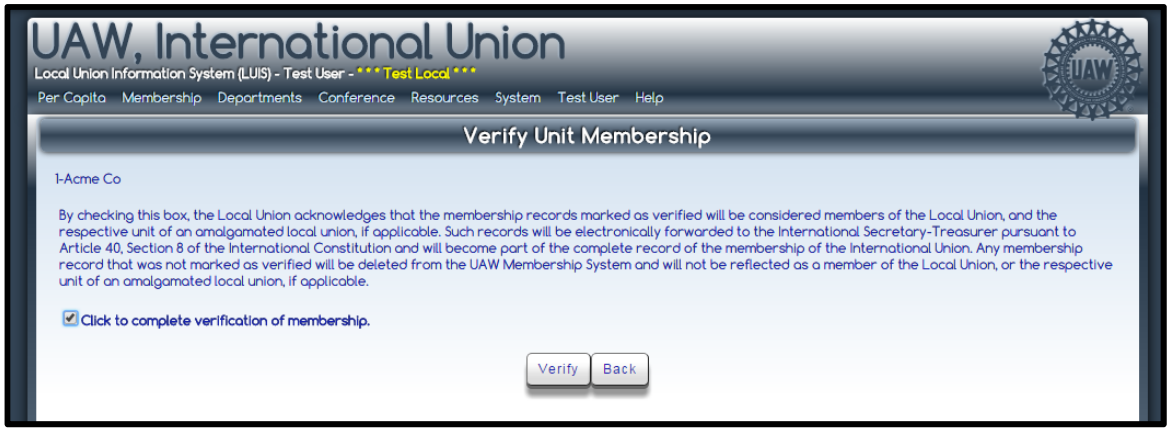
   **Note:** LUIS will accept files from Roberts Custom Software (RCS), KI, Microsoft Excel, and various other electronic formats. If you need assistance with uploading a file, please call the Membership Help Line at 313-926-4485.

4. Select your membership file and click **Upload**, the **File Upload Results** screen will appear.

A summary of the membership information will be displayed on the **File Upload Results** screen for your review. At the end of the summary will be a message indicating the total number of membership records included on the file.




5. If the summary information and number of records is correct, click on **Click here to end initial load for the unit** in the center of the screen. The **Verify Unit Membership** screen will appear.

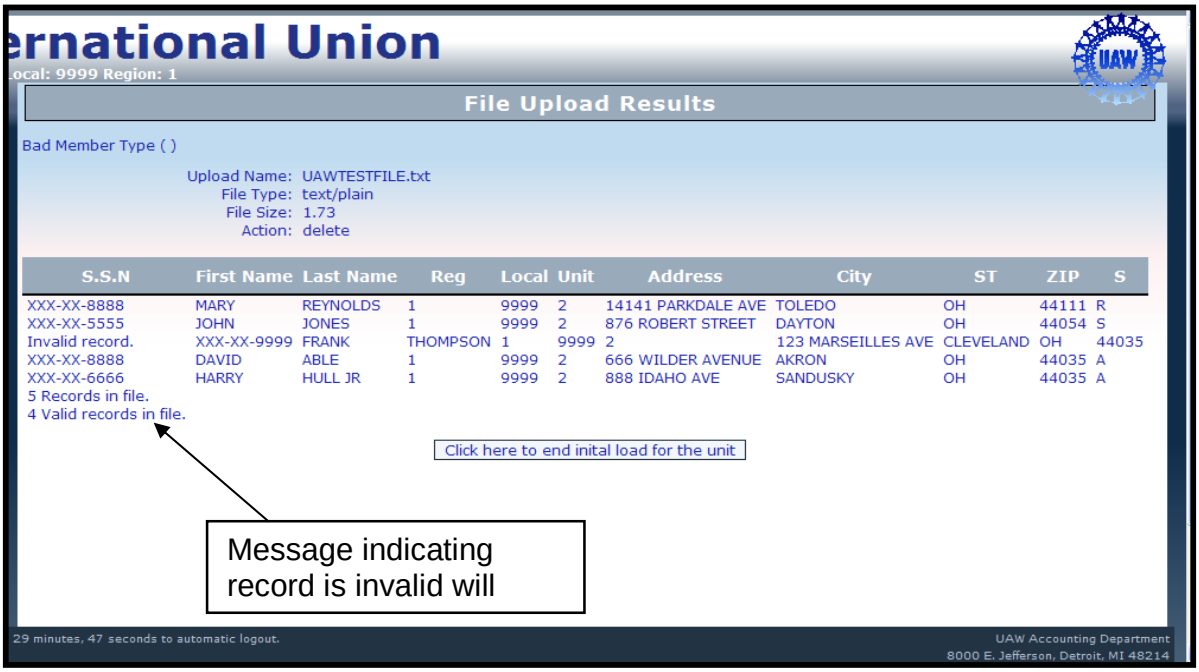



6. Check the box next to **Click to complete verification of membership**.
7. Click **Verify**. A message will appear indicating the records were processed successfully. The initial verification of membership is now complete for each unit that was included on the file.
8. Click on **Click here to continue** to return to the **Work with Units** screen.

The member count will now reflect the number of members that were verified for the unit on the **Welcome** page.

## *What Should I Do if the File Contains an Invalid Record?*

If there are invalid records on the file, the summary information on the **File Upload Results** screen will display a message indicating which record(s) is invalid.




## To correct an invalid record

1. Click on the **UAW, International Union** title banner at the top of the screen to end the file upload.
2. Access the data on the file and correct the missing/incorrect information on the invalid record(s). If you need help correcting invalid records, contact the Help Line for assistance at 313-926-4485.
3. Once the invalid records are corrected, follow the instructions in the section on ***Verifying Members by Uploading a File***.

## *What Should I do if the File is Invalid?*

A membership file is considered invalid if the file is not in the correct format to be uploaded into the membership system. Examples of items that could cause a file to be invalid are if required fields are missing from the file, or the information entered in a particular field does not match the criteria for that field (i.e. a number is entered in the last name field).

There are two ways to tell if a membership file is invalid. When the summary data contained on the file is displayed on the **Upload File Results** screen, scroll to the bottom of the summary information. On the left-hand side will be a count of how many records are in the file and how many of those records are invalid. If all of the records are invalid, then the file is invalid and cannot be uploaded.

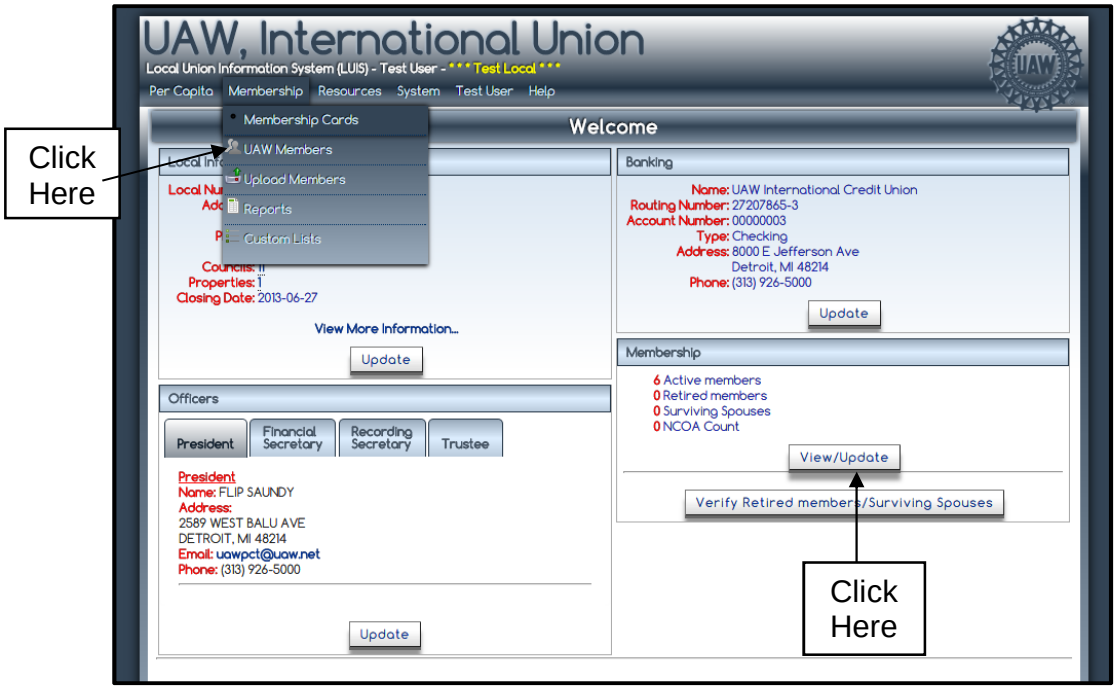
The second way to tell if a file is invalid is by reviewing the summary data contained on the **Upload File Results** screen for information that may be in the wrong field. For example, if the file incorrectly had the member's last name in the field where city should be, the system would not flag the record as invalid. However, the information would appear incorrectly on the screen and should be corrected before the file is uploaded.

If you have a file that is invalid, contact the Help Line at 313-926-4485 for assistance. The Help Line will assist you in fixing the invalid file, or will update the membership system to recognize files in this format for your Local so future files can be easily uploaded to the membership system.

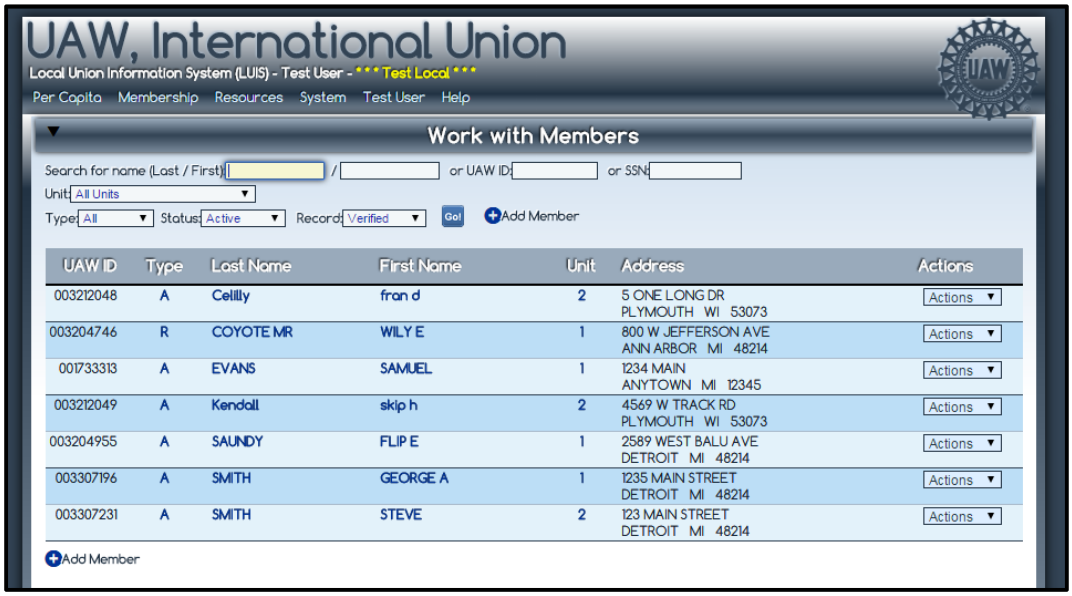
## *Maintaining Membership*

Once you have completed the initial verification of membership for your Local, there are two ways to access your Locals membership to make updates.

1. From the **Welcome** page, click on **View/update** under the Membership banner. The **Work with Members** screen will appear.
2. Or click on **UAW Members** under the Membership Menu on **Welcome page**. The **Work with Members** screen will appear.



The **Work with Members** screen will display a list of active members for the selected unit in alphabetical order by last name. You can change the information displayed by clicking on the **Type** or **Status** drop down menus to select categories of information to display.




## To Search for a Specific Member

1. Type the member's first and last name in the first blank box of **Search for name (Last/First).**

   or

2. If the **UAW Id** is known enter the number in the **UAW ID** search box.

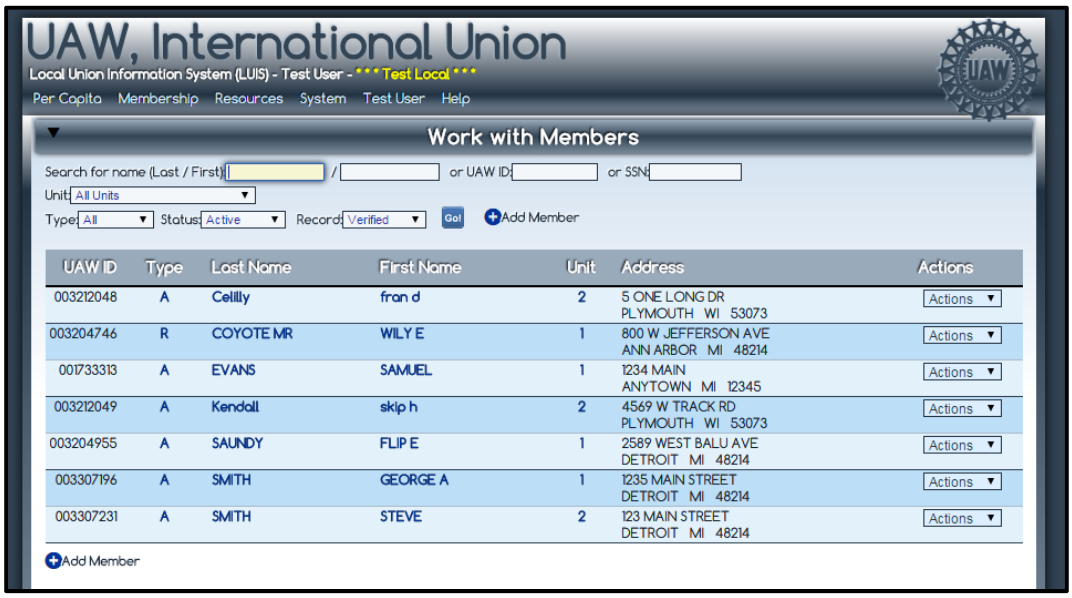
   or

3. If the Social Security Number is known enter the number in the **SSN** search box.
4. Click **Go** to search for the member based on the criteria that has been specified. The screen will display the selected member's information on the first line of the membership list.

## Updating and Adding Membership Information for a Single Member

From the **Work with Members** screen, you can add, delete or change membership information.

### To Add a Member




1. Click on **Add Member** in the top center of the screen. The **Add a New Member** screen will appear. The UAW ID will be assigned by the membership system and this field should be left blank.


2. Enter the member's Social Security Number **or** Employee ID number. You **must** enter at least one of these items to add the member's record. You may enter both if available.

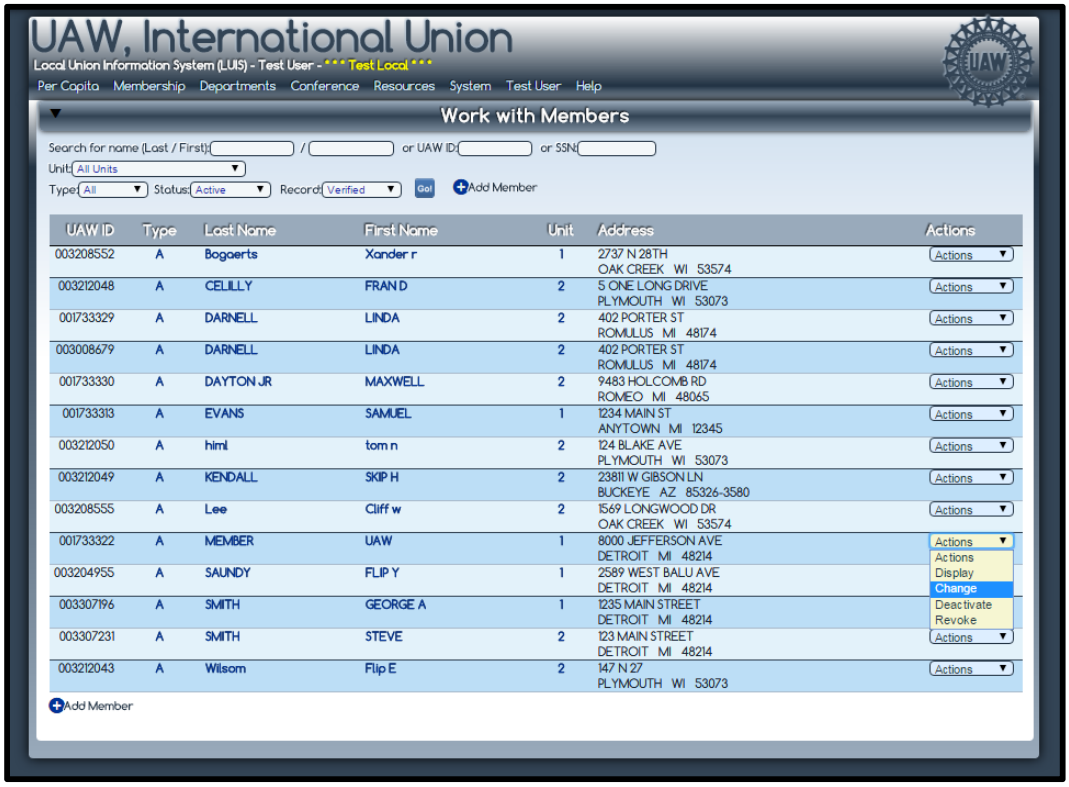
   *Social Security Number* – Please note that the electronic membership system is a secure system and social security numbers, if provided, are protected as outlined in the UAWs Policy on Protecting Social Security Numbers & Other Personal Information (UAW Administrative Letter #1, Volume 55, December 17, 2009).

   *Employee ID* – The Employee ID number is the unique ID assigned to each employee by the employer. The unique employee ID number may have a different name from employer to employer (i.e., personnel number, clock number, or company number). The Employee ID number can usually be found on the company file or the dues listing provided to the Local Union. If you cannot locate the Employee ID number, contact the company to request this information.

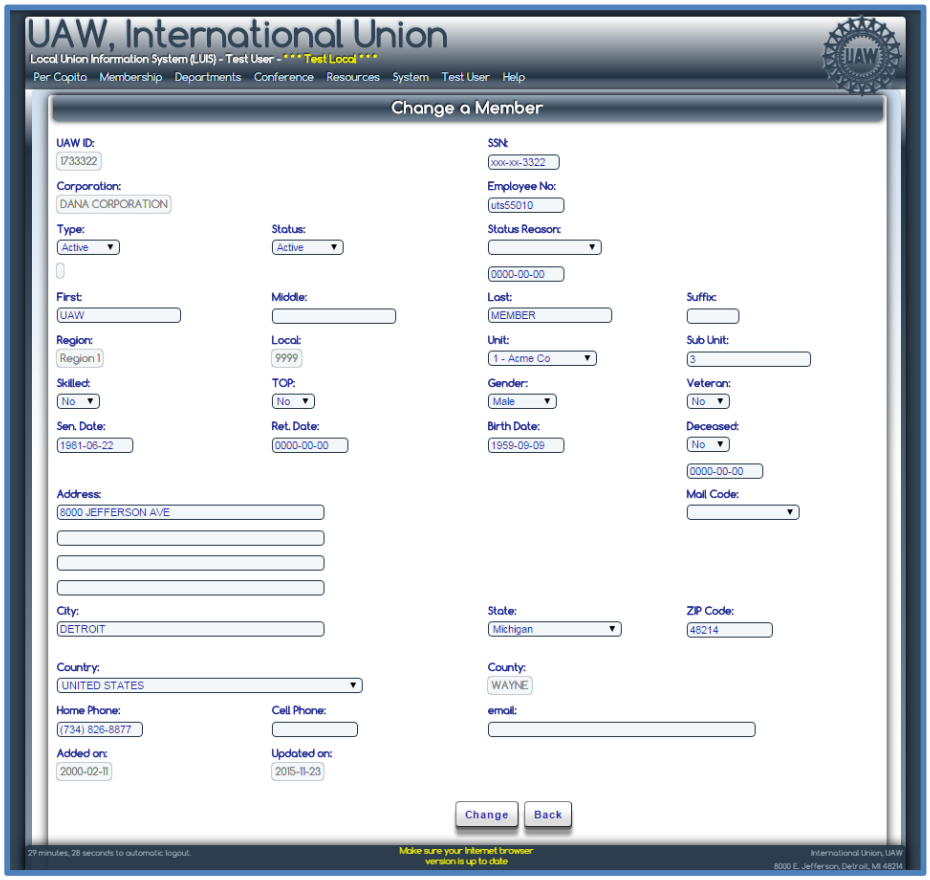
3. Click on the **Type** drop down menu and select the type of member.
4. Type the member's first name and middle initial in the **First / Middle** field.
5. Type the member's last name and suffix, if any, in the **Last / Suffix** field.

6. From the **Unit** drop down menu, select the unit to which the member will be added. If your Local has multiple worksites within the unit, you can enter a worksite designation in the **Sub Unit** field.
7. From the **Gender** drop down menu, click on the members gender.
8. Type the member's street address in the **Address** field.
9. Type the member's city in the **City** field.
10. From the **State** drop down menu, select the member's state.
11. Type the member's zip code in the **ZIP code** field.
12. Click **Add** when you have finished entering the member's information. A message will be displayed indicating "The record was added".
13. Click on **Click here to continue** and the **Work with Units** screen will appear.

## To Change a Members Record

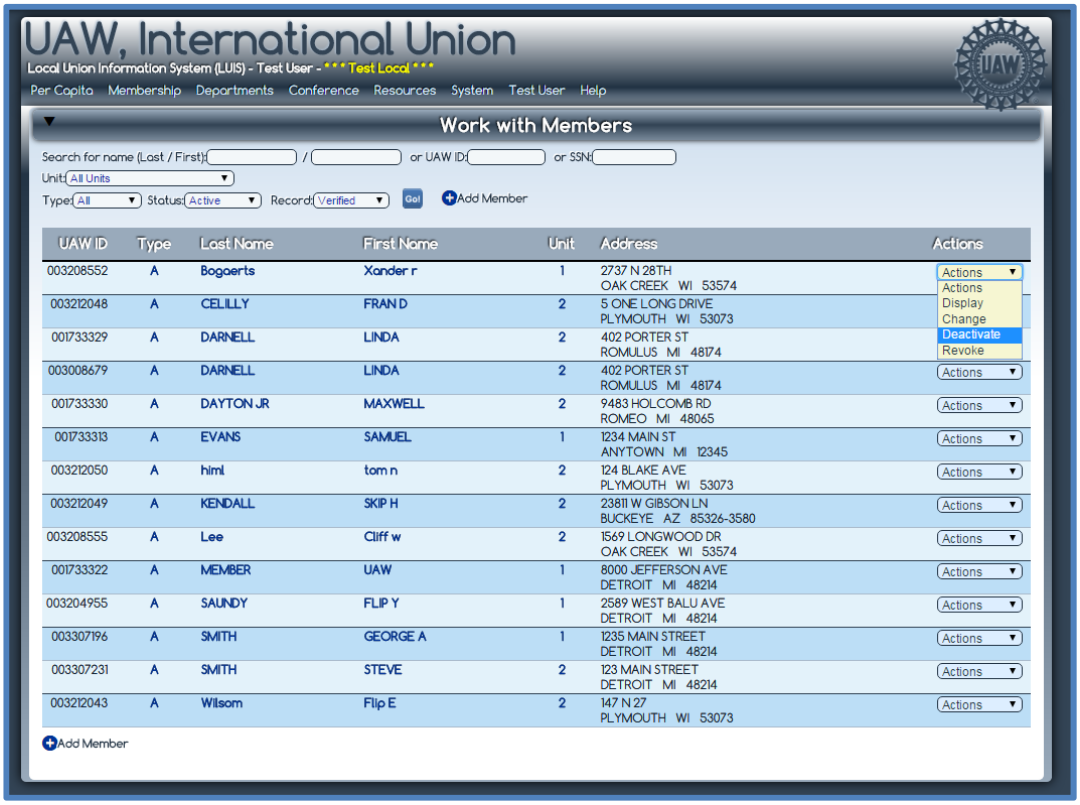



1. From the **Work with Members** screen, locate the member you want to change.
2. From the Actions drop down menu, click **Change**. The **Change a Member** screen will appear.




3. Move to the field that requires a change. Change the information in the desired field by typing over the existing information in that field.
4. Click on **Change** at the bottom of the screen. A message will be displayed indicating “The record was changed”.
5. Click on **Click here to continue**. The **Work with Units** screen will appear.

## To Deactivate a Member




1. From the **Work with Members** screen, locate the member you want to **Deactivate**.
2. From the Actions drop down menu, click on **Deactivate**. The **Deactivate a Member** screen will appear.


3. Click **Deactivate** to confirm. A message will be displayed indicating "The record was deactivated successfully. Status has been set to Inactive."
4. Click on **Click here to continue** to return to the **Work with Members** screen.

## To Mark a Member as Revoked


1. From the **Work with Members** screen, locate the member you want to **Mark as Revoked**.
2. From the Actions drop down menu, click on **Revoke**. The **Revoke a Member** screen will appear.

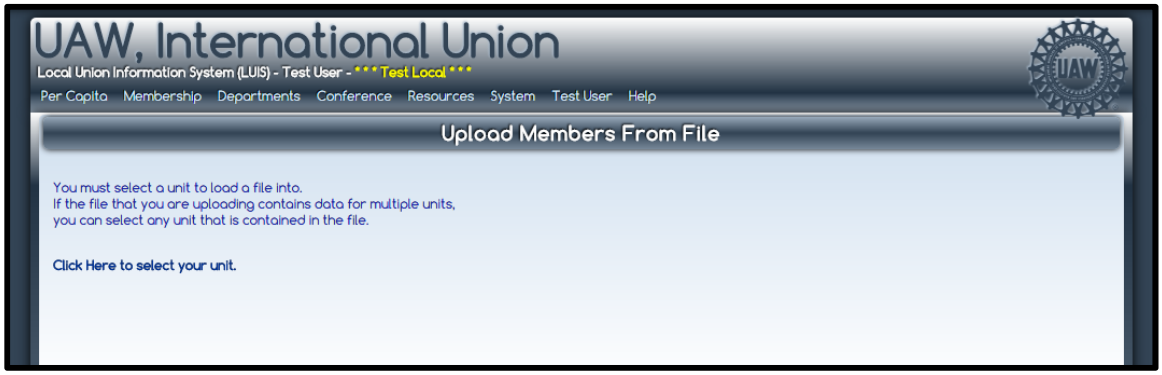

3. Click **Revoke** to confirm. A message will be displayed indicating "The record was processed successfully."
4. Click on **Click here to continue** to return to the **Work with Members** screen.

***Please note: The only time a local should mark a members revoked is when a member chooses to revoke their membership in a right to work situation. In all other withdrawal cases the local should choose to deactivate the member.***

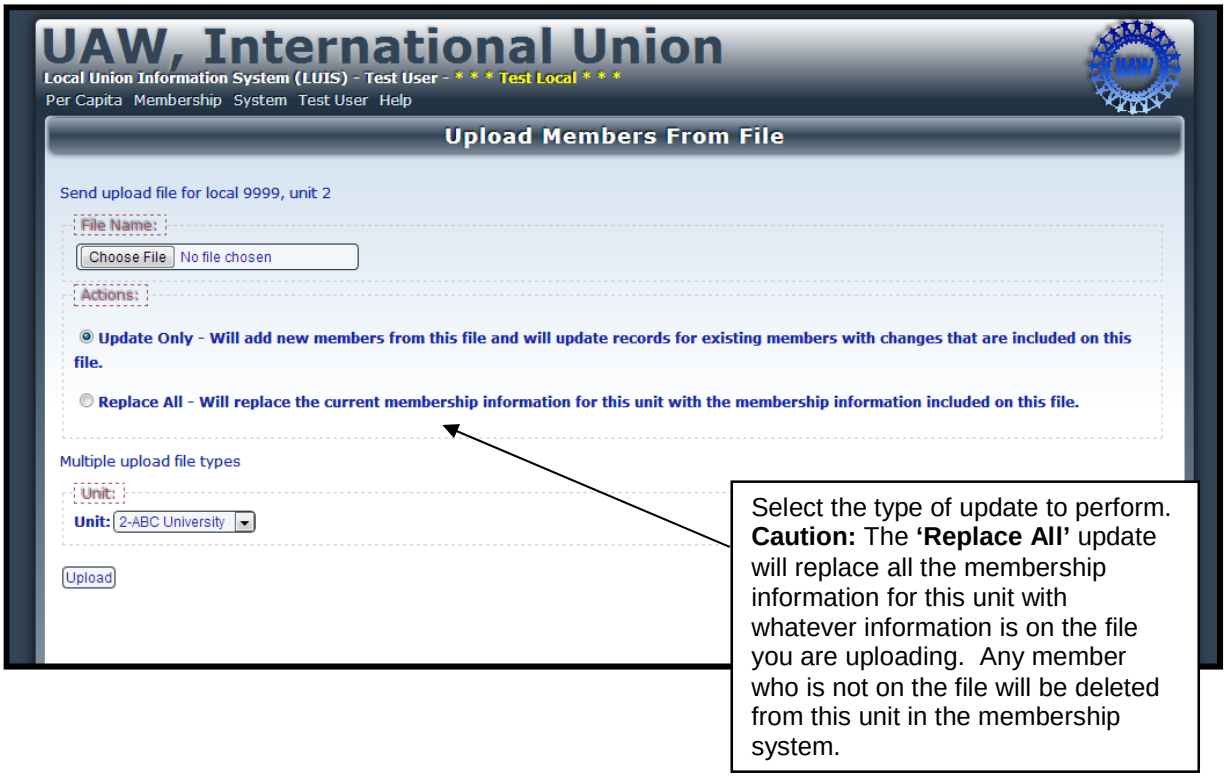
## *Uploading a Monthly Membership File*

Locals that receive membership data in an electronic format may choose to make monthly updates to their membership information by uploading a file from their current membership software (Roberts or KI) or from a company file.


1. From the **Welcome** page, click on **Upload Members** under the Membership Menu. The **Upload Members From File** screen will appear.



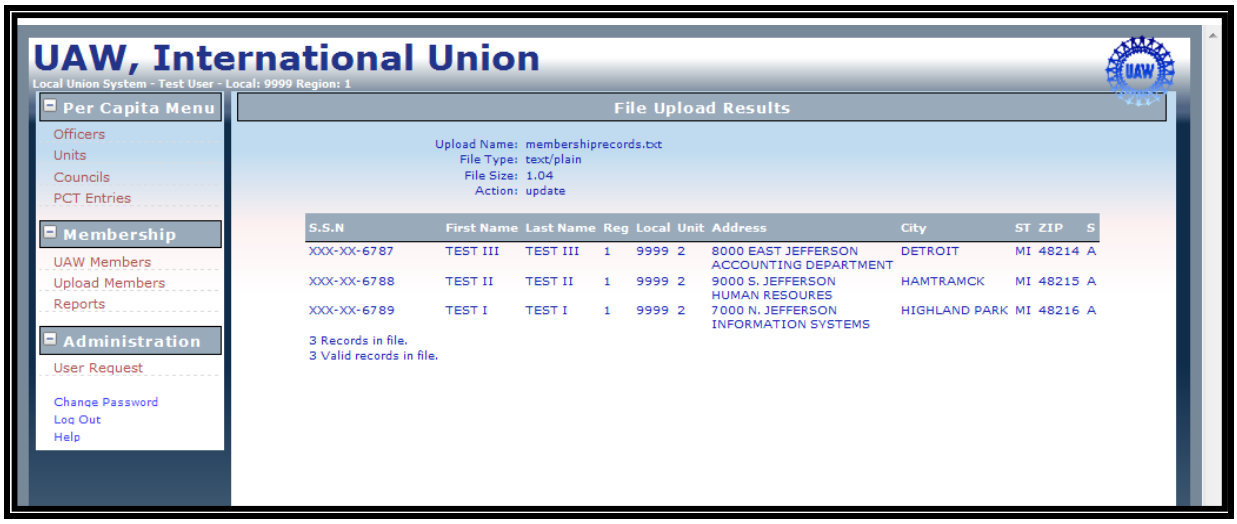

2. **Click Here to select your unit** to be directed to the **Work with Units** screen to be able to choose the unit you want to upload into.
3. Under the **Actions** dropdown menu choose **Upload File** to be directed to the **Upload Members From File** screen.




4. Click **Browse** to find your membership file. **Note:** If your membership file contains membership information for multiple units, the system will upload the data for all units included on the file at the same time.
5. Under the **Actions** heading, select the type of update to be performed by the system.

    a. **Update Only** – This selection will add new members included on the file, and make changes to existing member's records that are included on the file. This option will not delete members who are no longer included on the file.
    b. **Replace All** – This selection will replace the current membership information for this unit with the membership information included on the file.

6. Click **Upload**. The **File Upload Results** screen will appear.




7. A summary of the membership information will be displayed on the **File Upload Results** screen for your review. At the end of the summary will be a message indicating the total number of membership records included on the file.

If the file contains invalid records, see the section titled "***What Should I do if the File Contains an Invalid Record?"***

# Reports and Additional Functions

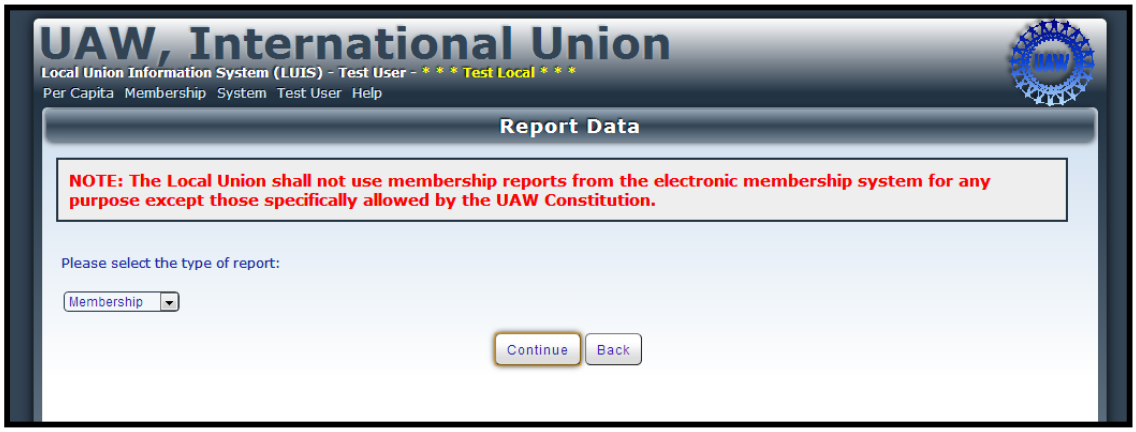
## *Reports*

The information contained in the Locals membership records can be used to print membership reports.

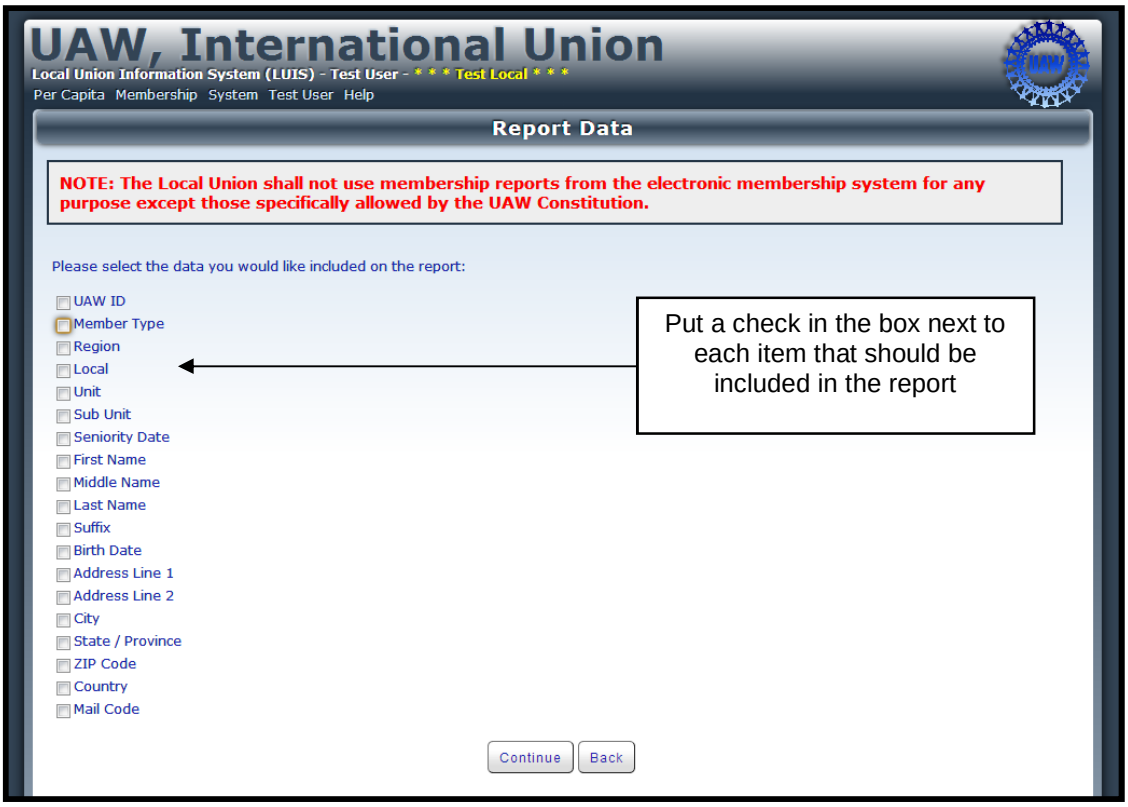
***Reports printed from this system shall not be used for any purpose except those specifically allowed by the UAW Constitution.***

## To Create a Membership Report


1. From the **Welcome** page, click **Reports** under the Membership Menu on the left-hand side of the screen. The **Report Data** screen will appear.

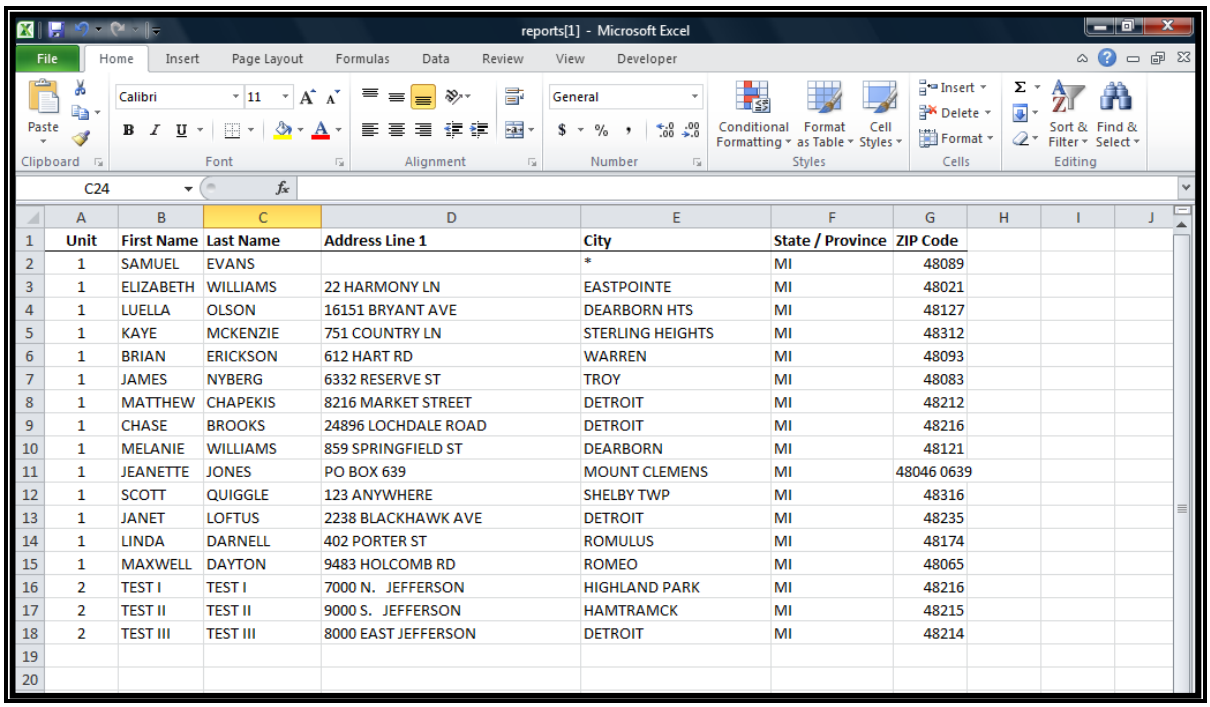



2. Select **Membership** from the drop down menu.
3. Click **Continue**. An expanded **Report Data** screen will appear.




4. Select the information that you want to appear in the report by putting a check in the box next to each item that should be included.
5. Click **Continue**.

The information selected will be transferred to a Microsoft Excel file. A message box will appear on the screen showing the name of the Excel file and a message asking if you want to open the file now or save the file on your desktop computer.

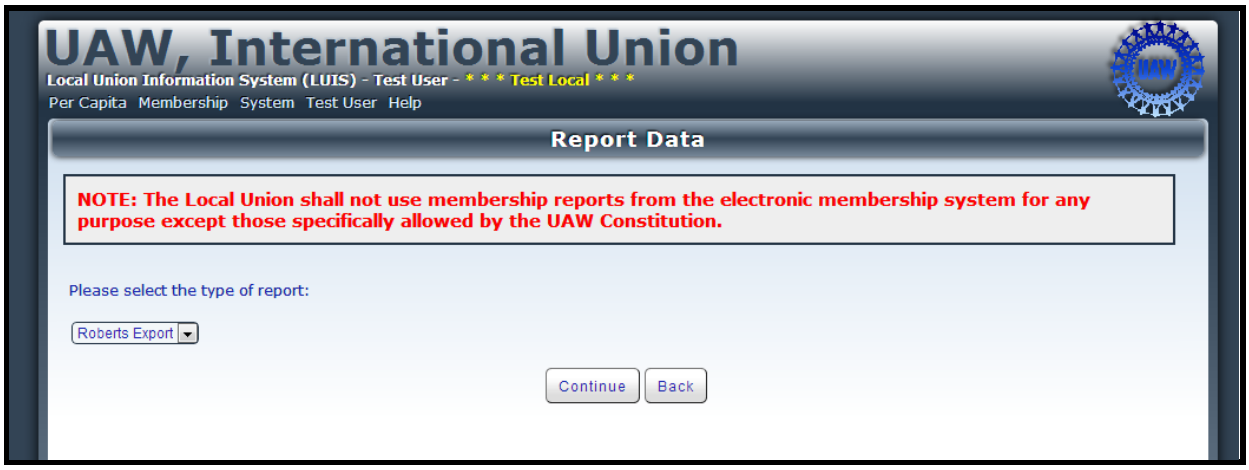



| | A | B | C | D | E | F | G |
|---|---|---|---|---|---|---|---|
| 1 | Unit | First Name | Last Name | Address Line 1 | City | State / Province | ZIP Code |
| 2 | 1 | SAMUEL | EVANS | | * | MI | 48089 |
| 3 | 1 | ELIZABETH | WILLIAMS | 22 HARMONY LN | EASTPOINTE | MI | 48021 |
| 4 | 1 | LUELLA | OLSON | 16151 BRYANT AVE | DEARBORN HTS | MI | 48127 |
| 5 | 1 | KAYE | MCKENZIE | 751 COUNTRY LN | STERLING HEIGHTS | MI | 48312 |
| 6 | 1 | BRIAN | ERICKSON | 612 HART RD | WARREN | MI | 48093 |
| 7 | 1 | JAMES | NYBERG | 6332 RESERVE ST | TROY | MI | 48083 |
| 8 | 1 | MATTHEW | CHAPEKIS | 8216 MARKET STREET | DETROIT | MI | 48212 |
| 9 | 1 | CHASE | BROOKS | 24896 LOCHDALE ROAD | DETROIT | MI | 48216 |
| 10 | 1 | MELANIE | WILLIAMS | 859 SPRINGFIELD ST | DEARBORN | MI | 48121 |
| 11 | 1 | JEANETTE | JONES | PO BOX 639 | MOUNT CLEMENS | MI | 48046 0639 |
| 12 | 1 | SCOTT | QUIGGLE | 123 ANYWHERE | SHELBY TWP | MI | 48316 |
| 13 | 1 | JANET | LOFTUS | 2238 BLACKHAWK AVE | DETROIT | MI | 48235 |
| 14 | 1 | LINDA | DARNELL | 402 PORTER ST | ROMULUS | MI | 48174 |
| 15 | 1 | MAXWELL | DAYTON | 9483 HOLCOMB RD | ROMEO | MI | 48065 |
| 16 | 2 | TEST I | TEST I | 7000 N. JEFFERSON | HIGHLAND PARK | MI | 48216 |
| 17 | 2 | TEST II | TEST II | 9000 S. JEFFERSON | HAMTRAMCK | MI | 48215 |
| 18 | 2 | TEST III | TEST III | 8000 EAST JEFFERSON | DETROIT | MI | 48214 |
| 19 | | | | | | | |
| 20 | | | | | | | |

6. Click **Open** to open the file in Microsoft Excel, or Click **Save** to save the file in Microsoft Excel. You are now able to work with the data as normal in excel.

## To Create a Roberts Export Report

1. From the **Welcome** page, click **Reports** under the Membership Menu on the left-hand side of the screen. The **Report Data** screen will appear.


2. Select the **Roberts Export** from the drop down menu.
3. Click **Continue**.


4. Click **Continue**, and the information will be transferred to a data file. A message box will appear on the screen showing the name of the file. You may save this file to be uploaded directly into your Roberts program.

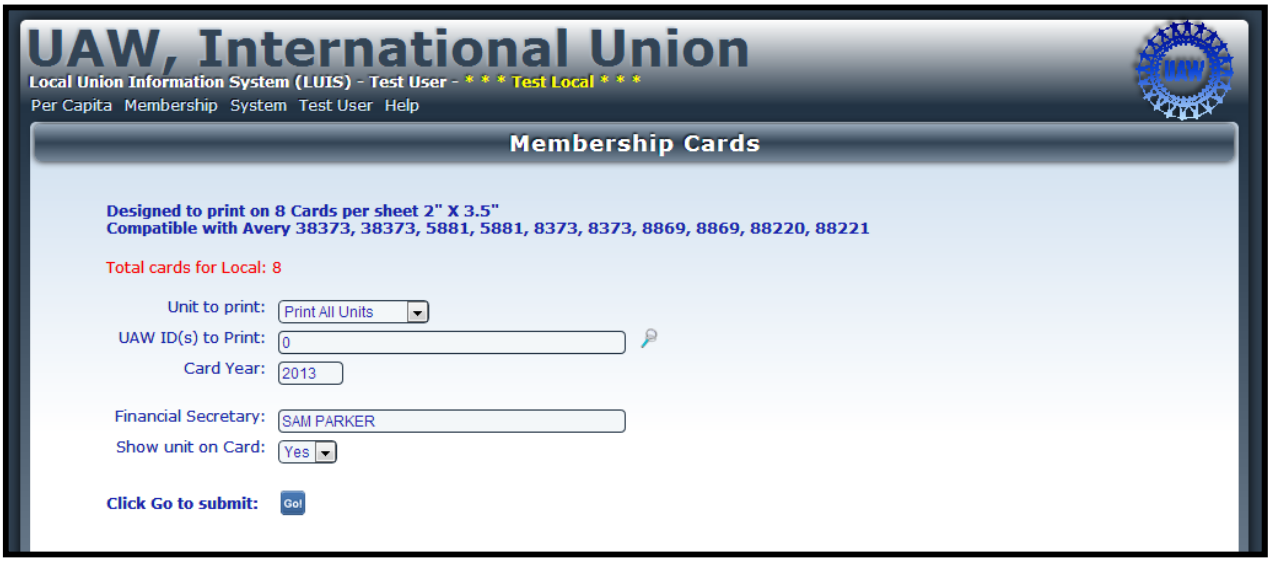
**If you have questions regarding the upload process please contact Roberts Custom Software directly.**

## *Membership Cards*

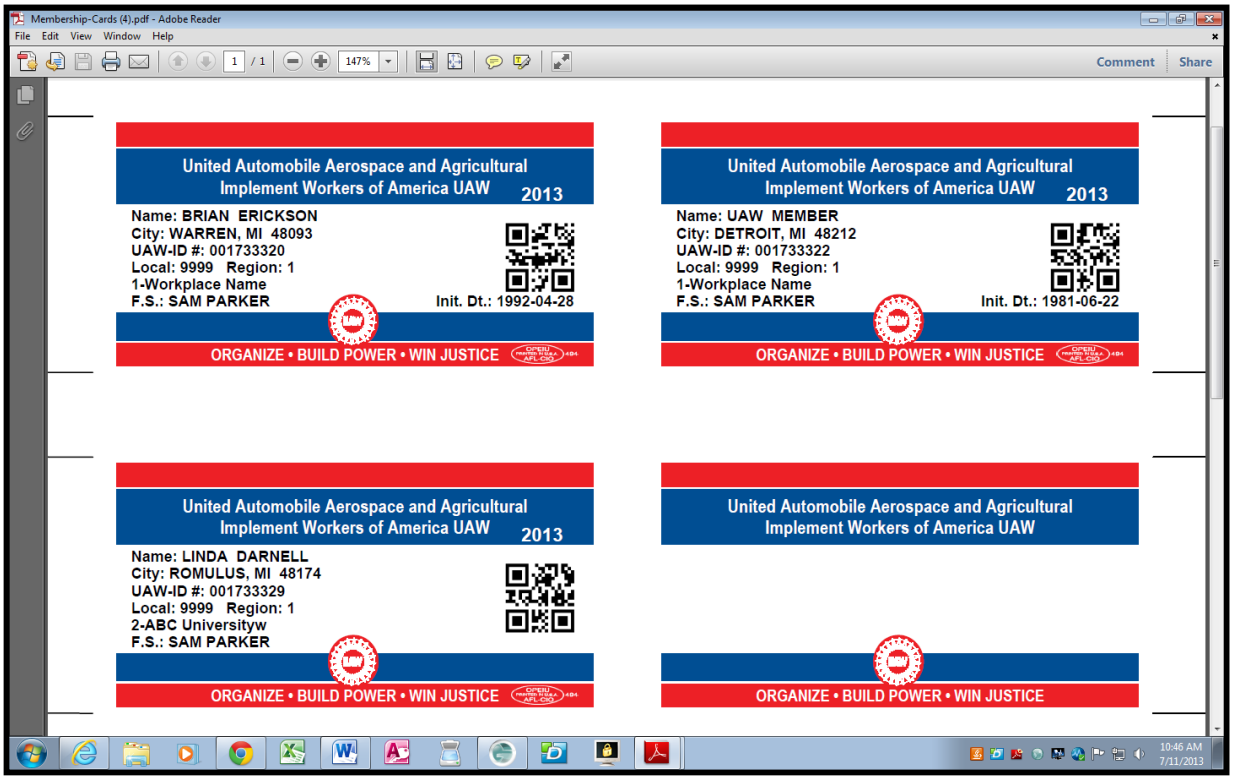
The information contained in the Locals membership records can be used to print membership cards. Membership cards can be printed for a single member, all members in a unit, or all members in the local.

### To Print a Membership Card

1. From the **Welcome** page, click **Membership Cards** under the Membership Menu. The **Membership Card** screen will appear.




2. From the **Membership Cards** screen, select the card(s) to print from the following options:
    - From the **Unit to Print** drop down menu, select the individual unit to print or leave the default Print all Units to select all the units in the local; or
    - To choose specific members, click on the magnifying glass to open the **Lookup Member** dialog box. From the box search for the member by name and click select next to the member you want to print. Repeat this until all members are chosen.
    - Type the year to be printed on the membership card in the **Card Year** field. The year will default to the current year, but can be changed if necessary.
    - The Financial Secretary is defaulted to the current officer. If the current Financial Secretary is incorrect please go the **Officers** section under the **Per Capita** menu and add the correct officer.
    - Select yes or no to print the members unit on the card.
    - For locals with more than 1,000 members the system with create batches of 1,000 cards.
3. After selecting the print options, click on **Click Go to Submit**.




4. A PDF file will be created of the selected card(s). From here you may print the file and/or save it to your computer.

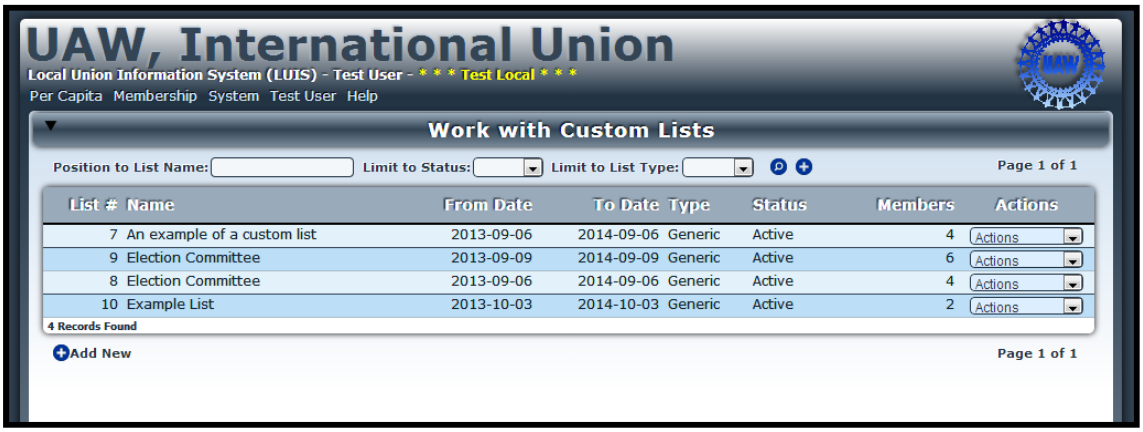
   **Please note:** The compatible card types are shown at the top of the **Membership Cards** screen.

## *Custom Lists*

The Custom List option allows for creation and maintenance of individualized membership group listings. You may create any list that is needed and maintain who is assigned to the group, as well as the amount of time the group will exist.

## To Create a Custom List

1. From the **Welcome** page, click on the **Membership** drop down menu and chose **Custom Lists**, the Work with Custom Lists screen will appear.


2. From the **Work with Custom Lists** screen click on the plus sign at the top or **Add New** at the bottom of the screen to create a new list, the **Add a List** screen will appear.


3. On the **Add a List** screen fill in the following information:

    a. **Name** – enter the name of the list (or custom group) you want to create.

    b. **List Type** – from the drop down list choose your list type.

    c. **Effective Date** – enter the starting date for the group.

    d. **Expiration Date** – enter the end date for the group if any.

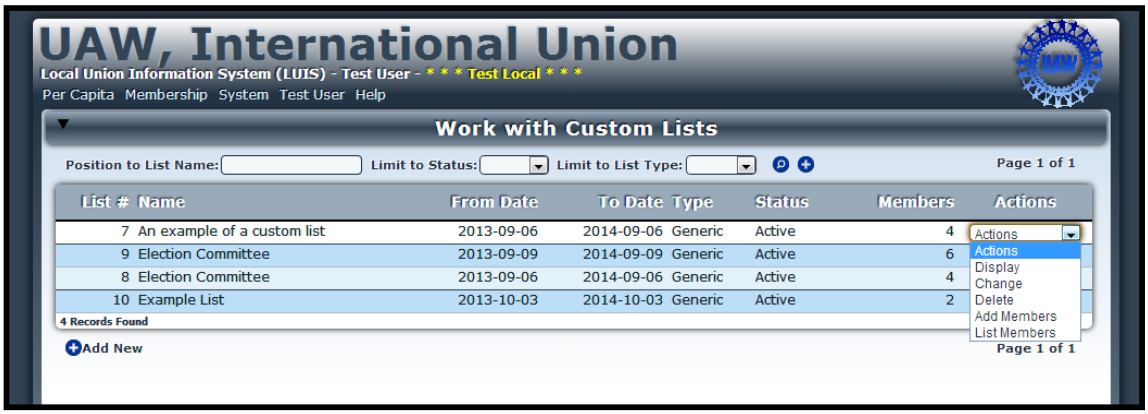
    e. **List Status** – from the drop down list choose Active.

4. Once all of the information is entered and verified click the **Add** button.

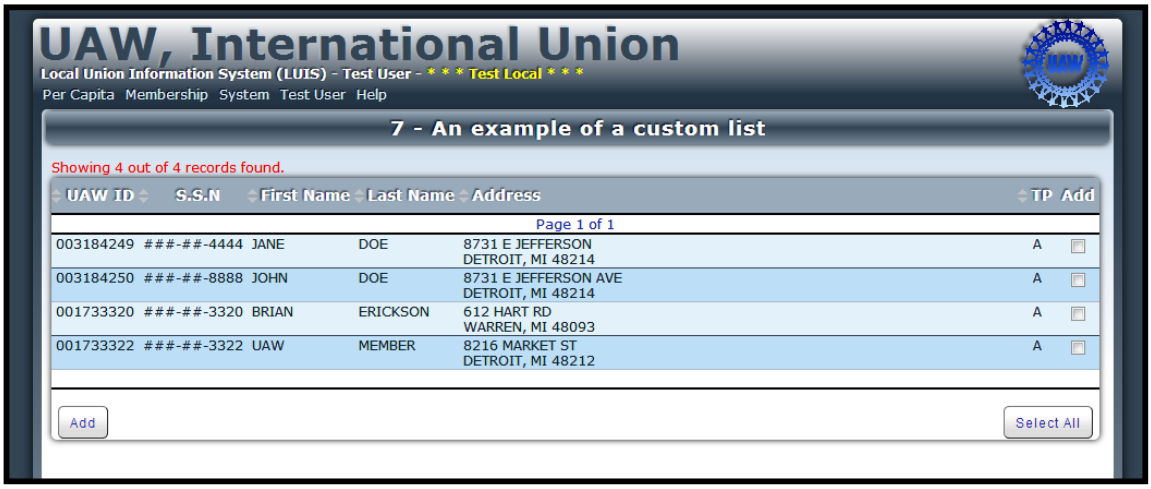
5. Once the record has been created you will see the “The record was processed” message appear. Click the **Continue** button and you will be directed back to the **Work with Custom Lists** screen.

## To Add Members to a Custom List

1. From the **Work with Custom Lists** screen choose the list you want to populate.




2. Under the **Actions** drop down menu choose **Add Members**, the **Custom List** screen will appear.




3. From the **Custom List** screen you can do the following:

   a. Choose individual members to add to the group by checking the box next to each name.

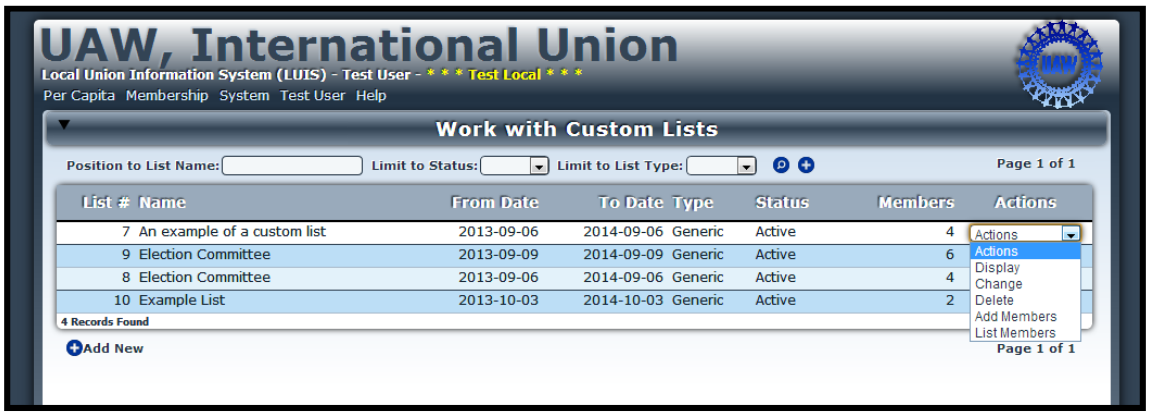
   b. Click **Select All** to choose all members in the local.

4. Once all the members have been selected, click the **Add** button.

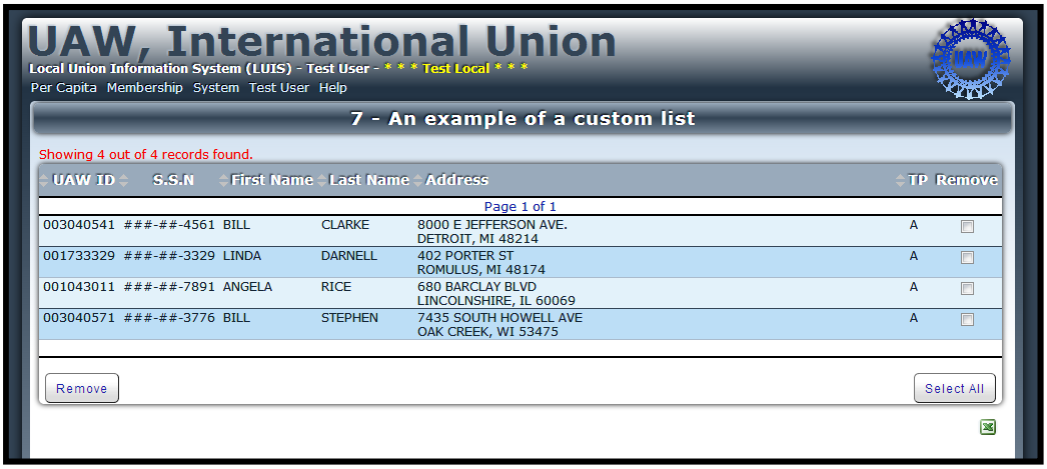
5. You will see a message stating how many records were processed. Click the **Continue** button to return to the **Work with Custom Lists** screen.

## To Remove Members from a Custom List

1. From the **Work with Custom Lists** screen choose the list you want to change.




2. Under the **Actions** drop down menu choose **List Members**, the **Custom List** screen will appear.




3. From the **Custom List** screen you can do the following:

   a. Choose individual members to remove from the group by checking the box next to each name.

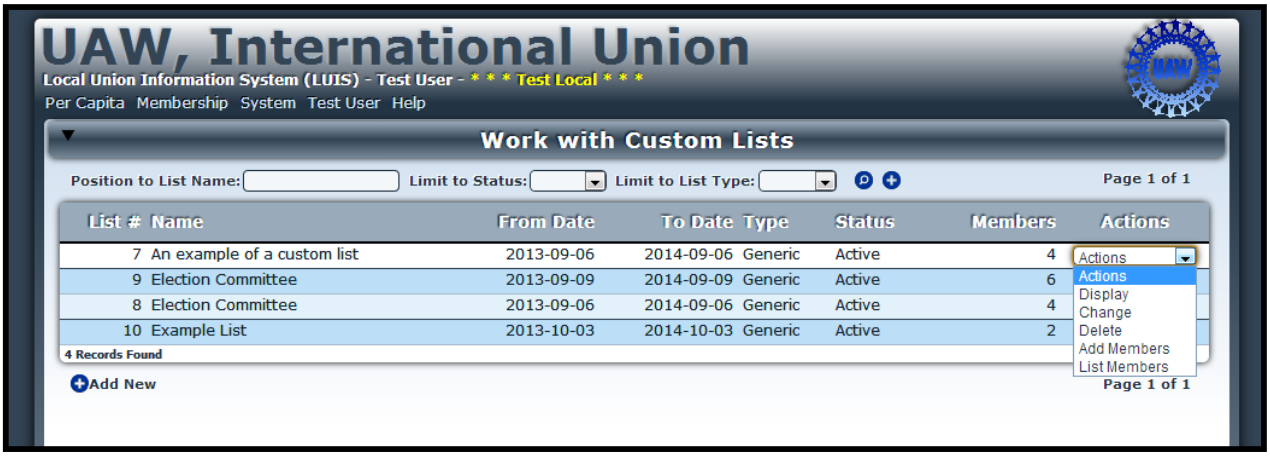
   b. Click **Select All** to remove all members in the group.

4. Once all the members have been selected, click the **Remove** button.

5. You will see a message stating how many records were processed. Click the **Continue** button to return to the Work with Custom Lists screen.

## To Change a Custom List

1. From the Work with Custom Lists screen choose the list you want to change.




2. Under the **Actions** drop down menu choose **Change**, the **Change a List** screen will appear.


3. From the **Change a List** screen you can do the following:

   a. **Name** – change the name of the list (or custom group).

   b. **List Type** – change the list type from the drop down menu.

   c. **Effective Date** – change the starting date for the group.

   d. **Expiration Date** – change the end date for the group if any.

   e. **List Status** – change the status from the drop down menu.

4. Once the changes have been completed and verified, click the **Change** button.

5. Once the record has been created you will see the "The record was processed message appear. Click the **Continue** button and you will be directed back to the **Work with Custom Lists** screen.

## *National Change of Address (NCOA) Updates*

### What are National Change of Address (NCOA) updates?

The National Change of Address (NCOA) database is maintained by the United States Postal Service (USPS) to record permanent changes of address filed with USPS by individuals, families and businesses. The NCOA database provides updated and accurate addresses, and identifies people who have moved with no forwarding address. USPS requires organizations to update their mailing lists for NCOA changes in order to obtain bulk mail rates, which are frequently used by the International Union for membership mailings.
When the International Union is notified of changes of address for our members, that information is provided to the respective local union in an effort to help the local union maintain accurate mailing addresses for members. If there are changes of address for members in your Local Union, a message will be posted on the Welcome page under the Membership banner.

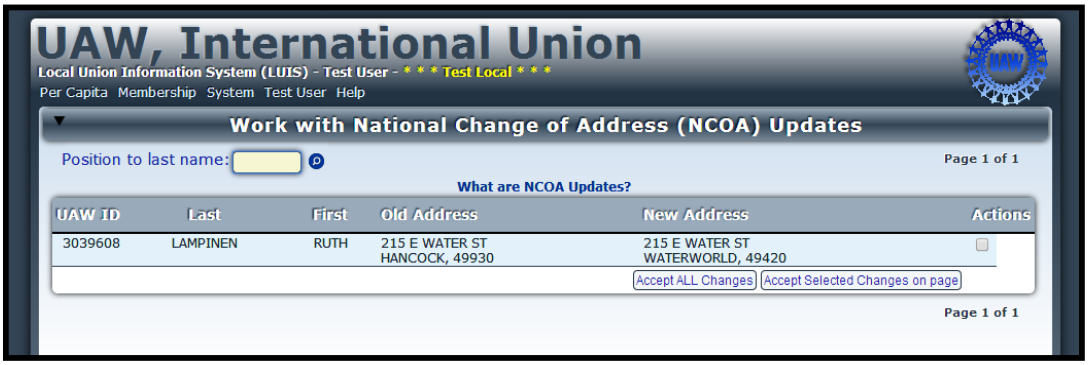
### What should the Local do if it receives changes of address that need to be verified?

When there are differences between LUIS and the National Change of Address Database the local will see the **NCOA Updates** option on the Welcome page.

The Local should review the change of address provided for each member and update the member's record by accepting the new address. Please keep in mind that these changes were initiated by an individual who filed a permanent change of address with the United States Postal Service so there is a high likelihood that the new address is accurate. However, if you believe the change of address is incorrect, you do not have to accept the change and the member's record will not be updated.

## To View and Make Address Changes


1. From the **Welcome** page, click on the **View Address Changes** option under the NCOA Updates heading. The **Work with National Change of Address (NCOA) Updates** screen will appear.

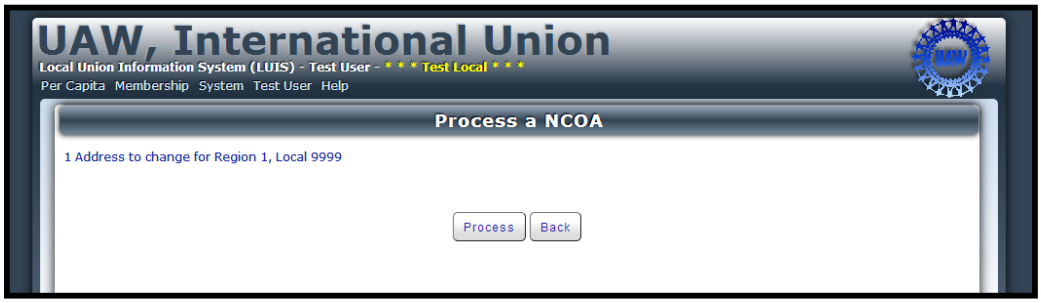



2. On the **Work with National Change of Address (NCOA) Updates** screen you will see the member's old address, and the new address as provided by the NCOA database. The address change for each member should be reviewed, and then:

    a. Click on the **Accept All Changes** button if all changes are approved.

    b. Click on the check box under the **Actions** tab for all accepted changes and then click on the **Accept Selected Changes on page** button to accept only chosen changes.

3. The **Process a NCOA** screen will appear.




4. Click the **Process** button to complete all indicated changes.

    **Please note:** That once the changes have been processed, the members address will automatically be updated in the LUIS system. If you are maintaining your membership records in another system, you must also make the changes in that system.

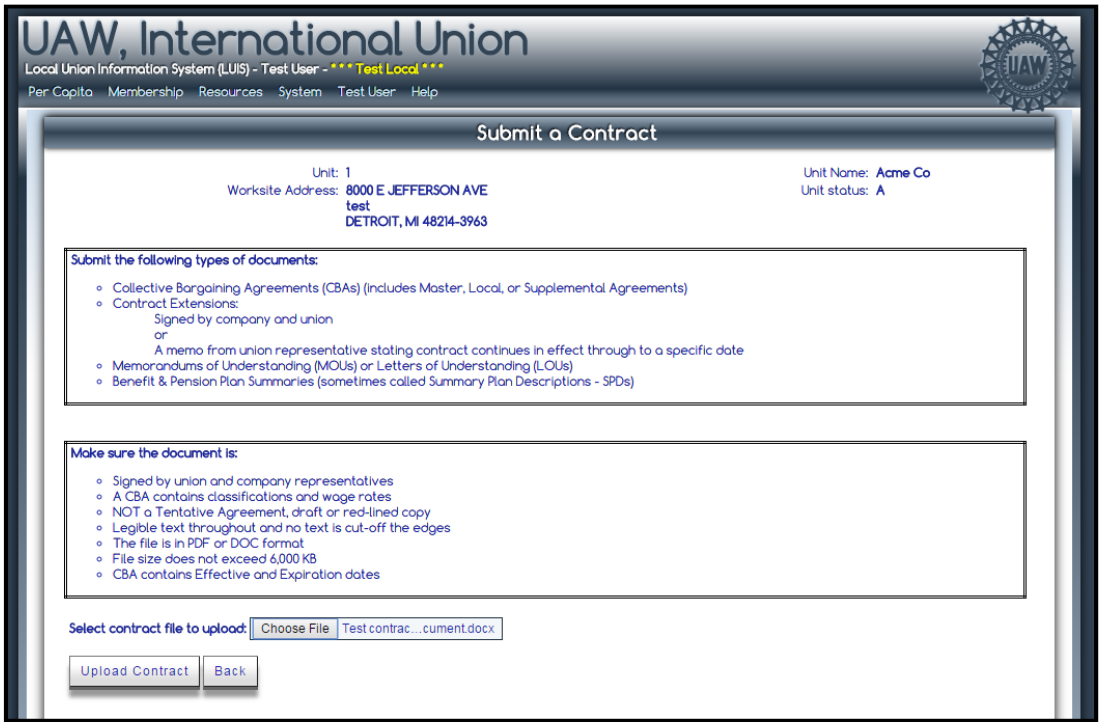
5. You will receive a message stating the process has been completed. Click the **Continue** button to return the **Welcome** page**.**

## *Contract Uploads*

The **Contract Upload** option allows the user to upload a Collective Bargaining Agreement (CBA) as a searchable document (DOC) or PDF file for each active unit.

## Uploading a Contract

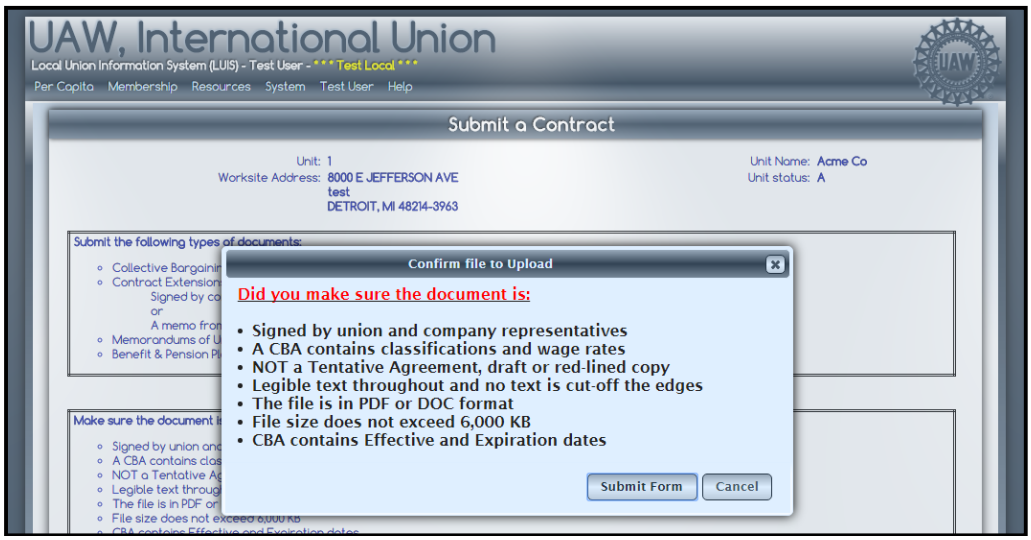

1. From the **Welcome** page, click on the **Update** option under the **Action** tab in the **Contracts** box. The **Submit a Contract** screen will appear.




2. Verify that there is a current CBA that meets the criteria outlined in the **Submit the following types of documents** and **Make sure the document is** boxes.

3. Click on the **Choose File** option and select the correct DOC or PDF file.

4. Once the file has been entered into the **Choose File** box, click **Upload Contract**.




5. Verify that the uploaded file meets all the criteria outlined in the **Confirm file to Upload**, and click **Submit Form**.


6. Once the file has been submitted you will see **The file Filename.DOC has been uploaded.** Click **Continue** to return to the **Welcome** page.

7. Repeat steps 1 through 6 for each contract upload.