

Reduced Per Cap Rate Setup

The idea is to setup a schedule of per capita rates with effective dates in a table whose code matches the MUMS Employer/ATU Unit code.

Therefore every active member within that Employer/Unit would be charged the rate based upon the dues month being processed. This amount would be used to determine a credit for Line S on the coversheet with a new detail report justifying the credit.

Member Information window for Van Elgort, Richard (111-11-9147). The Job Location Information section shows Employer ABC. A table titled 'Tables: Financial Codes' is displayed, showing the following data:

Code	Description	Amount	EffectiveDate
ABC	Reduced PC	\$12.15	09/01/2016
ABC	Waived PC	\$0.00	07/01/2017
ABC	Reduced PC	\$12.15	09/01/2017
XYZ	Waived PC	\$0.00	05/01/2017

Note:

Effective Date must be 7/1/2018 to work.

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				=	266.05	
T) Prior Month Credit Amount (if applicable)				=	0.00	U) \$266.05
						Total Lines Q thru T

ATU Line S Detail Report for the Month of February 2017

Employer/Unit Percap Rate - Reduced Rate = Credit x Member Count = Total

ABC	15.40	12.15	3.25	25	81.25
XYZ	15.40	0.00	15.40	12	184.80

Credit applied to Line S on Coversheet \$266.05

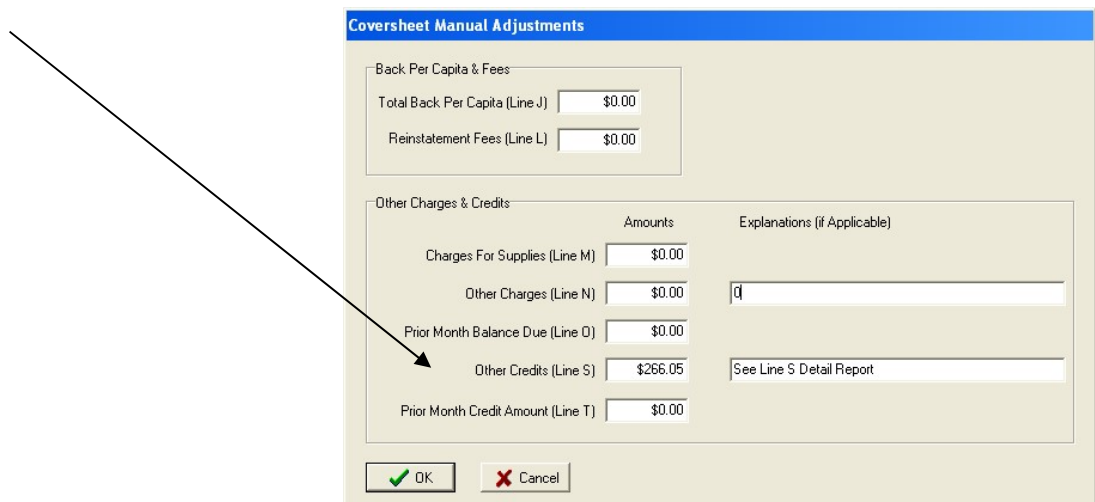
- The above report is generated in Step #3 of monthend prior to showing the manual adjustment dialog box when the “Enter Adjustments button is pressed.



Step 3: Coversheet Manual Adjustments

Enter Adjustments DONE

- Coversheet Line S Detail Report” goes in to the “Credit Explanation” field.



Coversheet Manual Adjustments

Back Per Capita & Fees

Total Back Per Capita (Line J) \$0.00

Reinstatement Fees (Line L) \$0.00

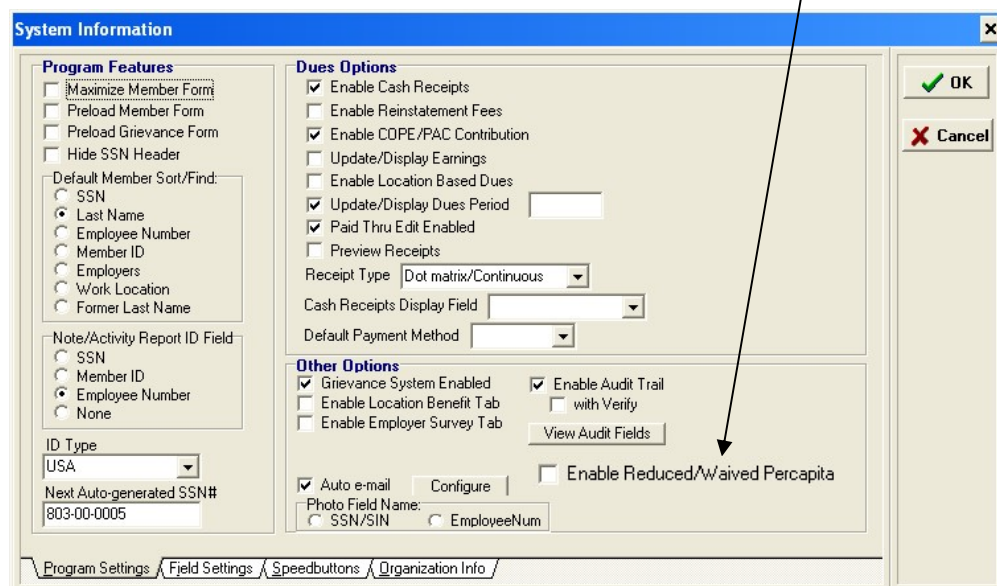
Other Charges & Credits

	Amounts	Explanations (if Applicable)
Charges For Supplies (Line M)	\$0.00	
Other Charges (Line N)	\$0.00	
Prior Month Balance Due (Line O)	\$0.00	
Other Credits (Line S)	\$266.05	See Line S Detail Report
Prior Month Credit Amount (Line T)	\$0.00	

OK Cancel

- Note: This Function is only available if the System Switch is set. This is found under File|Setup|System Information...

[] Enable Reduced/Waived Percapita



System Information

Program Features

☐ Maximize Member Form

☐ Preload Member Form

☐ Preload Grievance Form

☐ Hide SSN Header

Default Member Sort/Find:

☐ SSN

☒ Last Name

☐ Employee Number

☐ Member ID

☐ Employers

☐ Work Location

☐ Former Last Name

Note/Activity Report ID Field

☐ SSN

☐ Member ID

☒ Employee Number

☐ None

ID Type

USA

Next Auto-generated SSN#

803-00-0005

Dues Options

☒ Enable Cash Receipts

☐ Enable Reinstatement Fees

☒ Enable COPE/PAC Contribution

☐ Update/Display Earnings

☐ Enable Location Based Dues

☒ Update/Display Dues Period

☒ Paid Thru Edit Enabled

☐ Preview Receipts

Receipt Type Dot matrix/Continuous

Cash Receipts Display Field

Default Payment Method

Other Options

☒ Grievance System Enabled

☐ Enable Location Benefit Tab

☐ Enable Employer Survey Tab

☒ Enable Audit Trail

☐ with Verify

View Audit Fields

☒ Auto e-mail

Configure

☐ Enable Reduced/Waived Percapita

Photo Field Name:

☐ SSN/SIN

☐ EmployeeNum

OK Cancel

Program Settings / Field Settings / Speedbuttons / Organization Info