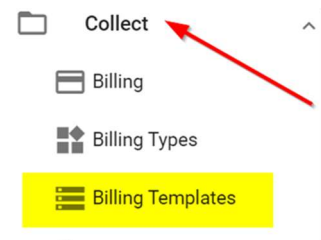




# IAFF STATE/PROVINCIAL PCT PROCESS

## BILLING TEMPLATE

To access **Billing Templates**, from the left navigation panel choose **Collect** then **BILLING TEMPLATES**.



You must first set up your Billing Templates. After the initial set up, SMART will retain all information entered.

Select the blue command button **+ADD**.

### Billing Templates

Billing templates allow you to appropriately apply various rates across different groups of people. Define your groups, prepare your rates, bill away.

(You can also turn them on and off as necessary.)

Select an Organization \*  
IAFF



If a change is needed to the Billing template, click on details to modify.



You will be presented with the page titled **ADD BILLING TEMPATES:**

Enter Name/Description.

Attribute \*

Person Profile Status

Click the **+ADD ATTRIBUTE** command

+ ADD ATTRIBUTE

Have a new |

--

Details

Select an org: A0009 - Pr

Name/Desc

Person Profile Status

Person Profile Type

Group Attri

What group |

(If these rates apply to your entire membership, no attributes are needed.)

+ ADD ATTRIBUTE

Billing Rates

Define all of the rates that apply to the group defined above. Rates could be for dues, fees, assessments, etc.

Add rates that apply to ALL or MOST of your membership below. Billing adjustments can be made for exceptions. (If the rate applies to less than half of your membership, it is better to enter them as adjustments and not as a rate.)

Type \*

Amount \*

Effective Date \*

Expiration Date

Frequency \*

Monthly

LEAVE FREQUENCY SET TO MONTHLY

+ ADD RATE

+ ADD X CANCEL

button to customize the group of members to which the template should apply.

From the dropdown menu, select the required "Attribute". Once the **ATTRIBUTE** is selected, the **VALUE** dropdown will be populated.

Value \*

--

Active

Automatic Suspension

Inactive

Inactive - Deceased

Inactive - Involuntary Forfeiture



Select a bill type from the dropdown menu.

Type \*

--

- 
- Dues
- Contribution
- Initiation Fee

Provide a billing amount and a date the rate was/is effective. Expiration date can be set if needed.

Amount *	Effective Date *	Expiration Date
\$0.00		

Lastly, indicate the frequency of your billing rate. The frequency is set to 'Monthly' by default.

If you would like to have multiple rates, click the **ADD RATE** command button to add another rate.

+ ADD RATE

Finally, click the **+ADD** command button on the bottom right corner of the page to publish your template.

+ ADD × CANCEL

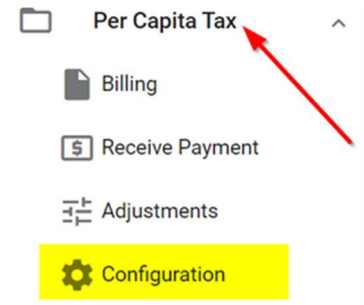


## CONFIGURATION

To access **Configuration**; from the left navigation panel choose **PER CAPITA TAX** then **CONFIGURATION**.

Once you have set up your Configuration the information will be retained in SMART.

If a change is needed to your Configuration, return to **CONFIGURATION** to adjust.



Configuration

Set up the PCT configuration for your organization below.

Select an Organization  
A0009 - Professional Fire Fighters Of Georgia

RESET SAVE

**FEES AND TIMING**

Processing Fee  
\$0.00

Fee Description  
Flat Fee

Due Date Offset \*  
30

Fiat fee that will appear on PCT invoices for all organizations.

# of days after billing is posted that invoice is expected to be paid.

**PAYMENT OPTION DETAILS**

☐ Allow Credit Card? ☐ Allow ACH?

Checks Payable To  
Professional Fire Fighters Of Georgia

**CUSTOM MESSAGING**

Message

(Will appear on the bottom of invoices to all organizations)

**BILLING CAPS**

Set maximum limits (or caps) for billing templates, if they apply, here

DESCRIPTION	CAPS
Active Members	

## FEES and TIMING

**PROCESSING FEE** - If your organization charges a processing fee, enter the amount in this field. By default, the value is \$0.00.

**FEE DESCRIPTION** – This is an editable field to supply a description for the processing fee is applicable.

**DUE DATE OFFSET** – Automatically calculates due date based on the invoice date.  
(ALL INFORMATION ABOVE WILL BE VISIBLE ON THE INVOICES CREATED)



## CUSTOM MESSAGING

**MESSAGE** - Editable field to enter information you wish to be displayed on invoice. Example-If your local charges a late fee, you can enter that information here.

## PAYMENT OPTION DETAILS

### PAYMENT OPTION DETAILS

☒ Allow ACH?

If you wish to allow ACH payments, check the “Allow ACH” option.

**CHECKS PAYABLE TO** – This provides the information needed if organizations choose to pay via check.

## BILLING CAPS

If your organization has “Billing Caps” on the number of Active Members or Retired Members organizations have to pay for, they can be configured here.

To override a Billing Cap for a specific local, choose **Overrides**. Select the appropriate organizations for override. (Screen shot below) Once you have chosen the organization(s), click the blue command button **USE SELECTED**.

### BILLING CAPS

Set maximum limits (or caps) for billing templates, if they apply, here.

#### DESCRIPTION

Active Members

**Overrides** | Hide



L0574 - Savannah



L1416 - Valdosta

#### CAPS

20

10



### Configuration

Set up the PCT configuration for your organization below.

[< BACK](#)

Override Caps for - Active Members

Sel.	Type	L	Name	Number	City/Town	State/Province	Status	Billing/Dues	# Active	# Registered
<input checked="" type="checkbox"/>	State/Provincial Association		A0009 - Professional Fire Fighters Of Georgia	A0009	Hartwell	GA	Active		0	0
<input type="checkbox"/>	Local		L1492 - DeKalb County	L1492	Flowery Branch	GA	Active		110	1
<input type="checkbox"/>	Local		L2084 - Thomasville Professional Fire Fighters Association	L2084	Thomasville	GA	Active		20	9
<input type="checkbox"/>	Local		L2563 - Cobb Professional Fire Fighters	L2563	Marietta	GA	Active		162	209
<input type="checkbox"/>	Local		L2795 - Professional Fire Fighters of Athens-Clarke County	L2795	Athens	GA	Active		49	60
<input type="checkbox"/>	Local		L3335 - Carrollton	L3335	Bowdon	GA	Active		27	0
									Total: 668	Total: 512

# Selected: 0

## REMITTANCE ADDRESS

**PRIMARY ADDRESS** - Provide a remittance address or select **Use Primary Address** to automatically fill in the fields with the organization's address on file in SMART. Add any additional information to be displayed on the invoice.

### REMITTANCE ADDRESS

The address used for invoice remittance may be updated at any point in the process, even after a PCT billing has been posted. Simply re-create the invoice and send or provide as necessary.

☒ Use Primary Address

#### Primary Address

Country  
United States

Street Address  
319 Rugelwood Rd.

Suite, Building, Floor, etc.

City/Town  
Hartwell

State/Province  
GA

Postal Code  
30541

ZIP+4



## EMAIL DELIVERY

**SENDER E-MAIL ADDRESS** – Set up the email address from where invoices will be sent.

**SENDER DISPLAY NAME** – Editable field to customize display name and/or title. Example:  
John Doe, Treasurer

**E-MAIL SIGNATURE** – Editable field to customize signature or include organization logo.

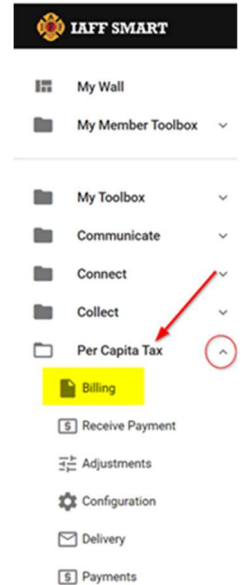
<b>E-MAIL DELIVERY</b>	
Sender E-mail Address emily.thompson.ecad@fhlj@gmail.com	Sender Display Name <i>Lenny Thompson, Secretary Treasurer</i>
<b>E-mail Signature</b>	
File ▾ Edit ▾ View ▾ Insert ▾ Format ▾ Tools ▾ Table ▾ Help ▾	
+▾          Formats ▾          Arial ▾ <b>B</b> <i>I</i> <u>A</u> ▾ [List icons] [Link icon]	
P » SPAN	0 WORDS POWERED BY TINY

Click the RESET button to delete changes or the SAVE button to record changes.

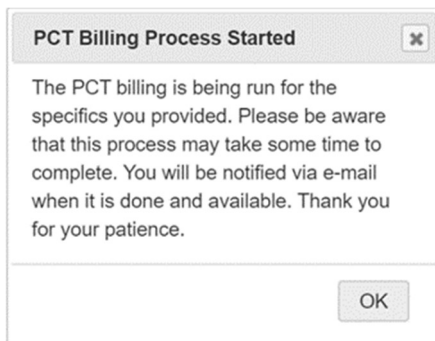


## RUN BILLING

To access **Organizational Billing**, from the left navigation panel choose **PER CAPITA TAX** then **BILLING**.



To run a new billing, click on **RUN NEW BILLING**. Select the organization for which you wish to run a billing and the billing period, then click **RUN**.



### IAFF SMART Billing Generation Process Complete



UnionTrack Support <support@uniontrack.com>  
To: Becky Miller

[Click here to download pictures.](#) To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Billing has been generated for A0029 - Professional Fire Fighters Of New Jersey.

IAFF SMART Support





Click on a row and scroll down the page to view invoice details. You will have the option to **POST**, **RERUN**, or **ROLLBACK** any unposted invoices. You will not be able to **POST**, **RERUN**, or **ROLLBACK** invoices that have already been posted.

**Billing**

This is where you control your PCT billings. You may run a new billing, post/rerun/rollback an existing billing, or just review past PCT billings. Also, be sure to keep your billing [configurations](#) up to date and make any necessary [adjustments](#) for the next invoice cycle. Thank you!

\*Please Note - Roster data used to create PCT billings are based on automatic snapshots from the first of each month. Billings may be rerun to include configuration changes and adjustments, but roster data cannot be changed within a snapshot.

Select an Organization \*  
IAFF

[▶ RUN NEW BILLING](#)

**PCT BILLING HISTORY**

Start Date \* 01/01/2019 End Date \* 04/30/2020

Period	# of Invoices	Amount	Status
4/2020	37	\$2,181,384.28	Posted
3/2020	38	\$2,181,500.90	Posted
2/2020	38	\$2,181,500.90	Posted
1/2020	37	\$2,181,421.28	Unposted
12/2019	37	\$2,181,421.28	Unposted

You will not be able to rerun or rollback a posted invoice

100 items per page 1 - 5 of 5

[POST](#) [▶ RERUN](#) [↺ ROLLBACK](#) [EXPORT](#)



☒ Individual Invoices ☐ Complete Invoice Details

### INDIVIDUAL INVOICES - 6/2020 (UNPOSTED)

Orga...	Bala...	New ...	Total...	Status	Financ...	Posit...	First ...	Last ...	Mobi...	E-mail	E-ma...	Date ...
Evesham Township Fire District 1	\$0.00	\$665.00		New		Secretary/Treasurer					Not Ready	
F-169 Picatinny Arsenal	\$0.00	\$612.50		New		Treasurer					Not Ready	
F0147 - Coltsneck	\$0.00	\$420.00		New		Treasurer					Not Ready	
Gloucester County Professional Firefighters Local 3592	\$0.00	\$525.00		New		Treasurer					Not Ready	
10074 -	\$0.00	\$58,135.00										

EXPORT

Select **Individual Invoices** to view separate invoice information of each billed organization. Click on a row and scroll down to view that organization's billing details including billing rate and member counts (see below).



### INVOICE DETAILS - EVESHAM TOWNSHIP FIRE DISTRICT 1

☒ Invoice ☐ Members Included

Type	Description	Rate	Count	Amount
Dues	Active Members	\$17.50	38	\$665.00
			38	\$665.00

100 items per page 1 - 1 of 1

EXPORT

☐ Individual Invoices ☒ Complete Invoice Details

### COMPLETE INVOICE DETAILS - 6/2020 (UNPOSTED)

Organization	Type	Description	Rate	Count	Amount
Evesham Township Fire District 1	Dues	Active Members	\$17.50	38	\$665.00
F-169 Picatinny Arsenal	Dues	Active Members	\$17.50	35	\$612.50
F0147 - Coltsneck	Dues	Active Members	\$17.50	24	\$420.00
Gloucester County Professional Firefighters Local 3592	Dues	Active Members	\$17.50	30	\$525.00
I0074 - Princeton University	Dues	Active Members	\$17.50	14	\$245.00
L0198 - Atlantic City	Dues	Active Members	\$17.50	175	\$3,062.50
L0286 - Perth Amboy	Dues	Active Members	\$17.50	49	\$857.50
L0290 - Woodbridge	Dues	Active Members	\$17.50	50	\$875.00
L0384 - Asbury Park	Dues	Active Members	\$17.50	52	\$910.00
L0798 - Camden	Dues	Active Members	\$17.50	120	\$2,100.00
				3,322	\$58,135.00

100 items per page 1 - 68 of 68

EXPORT



Select **Complete Invoice Details** to view a breakdown of billing totals for all organizations including billing rate and member count.

If you have selected **Individual Invoices**, scroll down, and select **Members Included** to view a list of all members included on the invoice.

### INVOICE DETAILS - EVESHAM TOWNSHIP FIRE DISTRICT 1

☐ Invoice ☒ Members Included

Last Name	First Name	Member #	Billing Rate	Type	Billing Template
Anderson	Bob	10100001	17.5	Dues	Active Members
Baker	John	10100002	17.5	Dues	Active Members
Barber	William	10100003	17.5	Dues	Active Members
Barnes	Steve	10100004	17.5	Dues	Active Members
Bergman	Thomas	10100005	17.5	Dues	Active Members
Bergman	Tom	10100006	17.5	Dues	Active Members
Carroll	Robert	10100007	17.5	Dues	Active Members
Cook	Michael	10100008	17.5	Dues	Active Members
Dawson	John	10100009	17.5	Dues	Active Members
Decker	John	10100010	17.5	Dues	Active Members
Frederickson	Warren	10100011	17.5	Dues	Active Members
Grant	Robert	10100012	17.5	Dues	Active Members
			\$665.00		

100 Items per page 1 - 38 of 38

EXPORT



### DOWNLOAD PDF INVOICES

**Delivery**

Posted PCT invoices are available for printing and e-mail delivery below.

*\*Please Note - Roster data used to create PCT billings are based on automatic snapshots from the first of each month. Billings may be rerun to include configuration changes and adjustments, but roster data cannot be changed within a snapshot.*

Select an Organization \*

IAFF

**PCT BILLING HISTORY**

Start Date: 09/01/2019 End Date: 11/30/2020

Period	# of Invoices	Amount
4/2020	37	\$2,181,384.26
3/2020	38	\$2,181,300.90
2/2020	38	\$2,181,300.90
1/2020	37	\$2,181,421.28
12/2019	37	\$2,181,421.28

Individual Invoices | Complete Invoice Details

**INDIVIDUAL INVOICES - 4/2020 (POSTED)**

SELECT ALL | Deselect All

Del.	Organization	Type	Balance Forward	New Charges	Total Amount	Status	Financial	Position	First Name	Last Name	Mobile Phone #	E-mail	E-mail Status	Date Printed	PDF Invoice
<input checked="" type="checkbox"/>	Atlanta Firefighters Association		\$223.24	\$116.62	\$339.86	Open	●						No Email Address	06/25/2020	
<input type="checkbox"/>	Arbery		\$2,740.00	\$2,752.00	\$5,492.00	Open	●	President	Justin	YORRUMS		justin.yorrum@arbery.com	Delivered		
<input type="checkbox"/>	Bilco		\$12,713.26	\$1,809.58	\$14,522.84	Open	●						No Email Address		
<input type="checkbox"/>	Bloomington		\$1,608.04	\$804.34	\$2,412.38	Open	●						No Email Address		
<input type="checkbox"/>	Carlisle		\$1,482,040.10	\$141,239.90	\$1,623,280.00	Open	●						No Email Address		
<input type="checkbox"/>	Chilmark		\$402.48	\$391.34	\$793.82	Open	●						No Email Address		
<input type="checkbox"/>	Copco (Buffy)		\$1,532.68	\$12,346.54	\$13,879.22	Open	●						No Email Address		
<input type="checkbox"/>	Easton Housing Authority		\$2,047.16	\$1,033.50	\$3,080.66	Open	●						No Email Address		
			\$4,319,991.68	\$2,181,384.26	\$6,501,375.94										

# Selected: 0

Re-creation of PDF invoices is only necessary when recipient information may have changed, i.e. a name, address or e-mail.

[RE-CREATE PDF INVOICES](#) [E-MAIL INVOICES](#) [RUN TO PRINT](#)



IAFF  
1324 Light Street, Suite 200  
Baltimore, MD 21774-5987  
(555) 123-4567  
iaffsmart@uniontrack.com

Invoice 1114

BILL TO  
Alberta Firefighters Association

DATE  
4/15/2020

PLEASE PAY  
\$349.86

DUE DATE  
5/15/2020

DATE	ACCOUNT SUMMARY	AMOUNT
6/22/2020	Balance Forward	\$233.24
4/15/2020	New charges (details below)	\$116.62
	Total Amount Due	\$349.86

DATE	ACTIVITY	QTY	RATE	AMOUNT
6/25/2020	Active Members	1	\$114.62	\$114.62
6/25/2020	fee	1	\$2.00	\$2.00

Please be sure your Local's roster is up-to-date with the IAFF. We utilize the SMART platform's roster to calculate our billing based on the number of Active Members.

Checks should be made payable to IAFF and sent to the above address.

TOTAL OF NEW CHARGES \$349.86

TOTAL DUE \$349.86

THANK YOU.

**NOTE:** Hey hEy heY

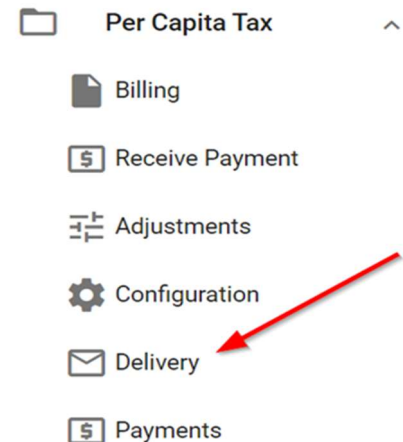
This is an example of what you will see when you download an invoice. The date is the date when the billing was posted. You will also be able to see the rates for different factors such as number of Active Members, processing fees, or any others that you configured in previous steps. Past due balances will be represented in the "Balance Forward" section.



## DELIVERY

To access **DELIVERY**; from the left navigation panel choose **PER CAPITA TAX** then **DELIVERY**.

After Billing has been ran and posted you need to “Deliver” your invoices.



If you are required to mail your invoices, please use the “Print” function. The date that the invoice was printed will be indicated in the **Date Printed** column.

The system will allow you to resend previous invoices that have already been delivered if required.

If you choose the email option for sending invoices, the person identified as the “Primary Financial Contact” in the **Organization Profile** will receive invoice to the email address provided in **SMART**. To assign this “Role” go to Organization Profile, choose the member, and check the box for **Primary Financial Contact**. To assign this “Role” go to appropriate **Primary Financial Contact**.

☒ Primary Financial Contact

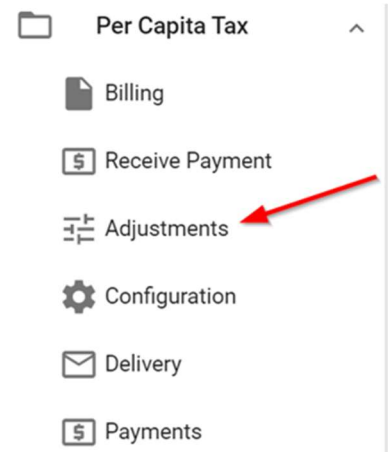
 - Denotes the primary financial contact.

If there is no designation of the “Primary Financial Contact” the system will look for the Treasurer listed in the **Organization Profile**. If no Treasurer exists, the system will look for Secretary/Treasurer, then the President to send invoices via email. If there are no officers or email addresses listed, a printed version of invoice can be sent.



## ADJUSTMENTS

To access **ADJUSTMENTS**; from the left navigation panel choose **PER CAPITA TAX** then **ADJUSTMENTS**.



If an adjustment needs to be made against a previous invoice, the adjustment will apply to the next Per Capita Tax Invoice.

Adjustments

Select an Organization \*

A0009 - Professional Fire Fighters Of Georgia

+ PAYMENT

Organization	Allows ACH	Allows CC	Last Invoice Date	Balance Forward	Last Invoice Am...	Due Date	Remaining Overdue Bala...	New Payments	Returned Payme...	New Adjustments	Current Balance
Augusta Professional Firefighters Association   IAFF Local 3357	●		07/01/2020	0.00	107.00	07/31/2020	0.00	0.00	0.00	0.00	107.00
L0574 - Savannah	●		07/01/2020	0.00	280.00	07/31/2020	-280.00	280.00	0.00	0.00	0.00
L1416 - Valdosta	●		07/01/2020	0.00	1.00	07/31/2020	0.00	0.00	0.00	0.00	1.00
L1492 - Dekalb County	●		07/01/2020	0.00	110.00	07/31/2020	0.00	0.00	0.00	0.00	110.00
L2084 - Thomasville Professional Fire Fighters Association	●		07/01/2020	0.00	20.00	07/31/2020	0.00	0.00	0.00	0.00	20.00
L2563 - Cobb Professional Fire Fighters	●		07/01/2020	0.00	162.00	07/31/2020	0.00	0.00	0.00	0.00	162.00
L2795 - Professional Fire Fighters of Athens	●		07/01/2020	0.00	51.00	07/31/2020	0.00	0.00	0.00	0.00	51.00

100 items per page

1 - 13 of 13





### Record Payment, Refund Payment or Make Invoice Adjustment (Debit/Credit)

Transaction History: Augusta Professional Firefighters Association | IAFF Local 3357

Date	Description	Type	Status Details	Amount	PDF Invoice
07/01/2020	July 2020 Invoice	5		107.00	<a href="#">Download</a>

☒ Record Payment ☐ Refund Payment ☐ Make Invoice Adjustment (Debit/Credit)

#### Record a Payment

Billing Type *	Payment Type *	Date *	Amount *
--	--		\$0.00
Memo			

[RESET](#) [+ ADD](#)

#### Record Payment

After making your selection, fill in all required fields (indicated by the red asterisks) and click the +ADD button. Please note which invoice you are recording a payment against by selecting the correct invoice under **Transaction History**.

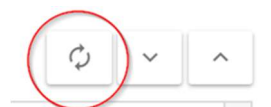
#### Refund Payment

Payments may be partially or fully refunded. Select a previous payment and if amount remains that can be refunded, choose **REFUND PAYMENT**. Then manage each line item with the appropriate amount to be refunded and provide an explanation, then click the **REFUND** button.

#### Make Invoice Adjustment (Debit/Credit)

All adjustments will apply to the next Per Capita Tax Invoice. After all required fields have been completed click the +ADD button.

Please Note: You will need to refresh with in the page to update information.

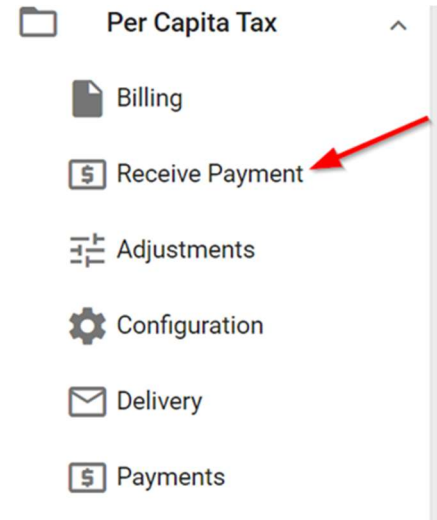




### RECEIVE PAYMENT

To access **RECEIVE PAYMENTS**; from the left navigation panel choose **PER CAPITA TAX** then **RECEIVE PAYMENTS**.

To record a series of payments received from Locals you can navigate to the **RECEIVE PAYMENTS** section.



Receive Payment

Do you need to record PCT payments you have received? You've come to the right place!

Payment To \*  
A0009 - Professional Fire Fighters Of Georgia

Billing Type \*  
-

Payment Type \*  
-

Payment From \*  
-

Date \*  
-

Amount \*  
\$0.00

Memo  
-

PLEASE NOTE - RED ASTERISK INDICATE REQUIRED FIELDS

+ RECORD PAYMENT X RESET

After entering all data to record the payment received, click the blue command button **+RECORD PAYMENT**. A new **RECEIVE PAYMENT** window will appear for you to enter the next payment.