

LIUNA Chicago MTP Manual

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Updates to the Manual

November 19, 2024

- More detail was added regarding how to add a new or existing Traveler and the 2400 hours requirements for a Transfer under the section, [For Locals – When to add a new member to their Local MTP database.](#)
- Added an Update from Training Center screenshot under the section, [How to confirm if your Local member has the correct Local assignment at the Training Center?](#)

FAQs

What are the goals of the Bi-directional Synchronization Project?

The Bi-directional Synchronization Project, implemented in 2021, is focused on sharing a member's common demographic information of their membership profile between the LIUNA Chicago Local Unions and the Training Center.

In the future, the plan is also to synchronize a member's common demographic information with the Laborers' Pension & Welfare Funds of Chicago and Vicinity and Fox Valley Laborers' Benefit Funds.

In addition, one of the other goals of this project is to help the International Union's effort to assist and improve the process and accuracy of collecting, updating, and sharing membership profile information for Local Union members in good standing – as stated in the November 28, 2017 letter to all LIUNA Local Union Business Managers and Secretary-Treasurers.

This project also streamlines backend office processes at LIUNA Chicago.

Examples include ensuring correct eligibility for benefits, improving the communication of those benefits, and effectively managing Local Union members for the Training Center, Laborers-Employers Cooperation and Education Trust (LECET), Labor-Management Cooperation Committee (LMCC), District Council, and Midwest Coalition of Labor (MCL).

How does the Bi-directional Synchronization Project benefit membership?

From a membership point of view, this project will provide LIUNA Chicago members with online access to update their membership profile information via the LIUNA Chicago Membership Portal login page: <https://mtp.chicagolaborers.org>.

With their Public Directory URL, members will have view-only access to their LIUNA Chicago ID Number, International Card Number, Local Number, Local Type, Training Center Type, Member Photo, Paid Thru Date, Skills, Completed Classes, Upcoming Classes, Contractor Hours (since 2021), and a digital version of their Membership Card.

What are the primary new features of the Bi-directional Synchronization Project in MTP?

1. Bi-directional synchronization of membership profile information between the Training Center and a respective Local's Membership Tracking Program (MTP)
2. Real-time Social Security number (SSN) check and Paid Thru Date information when adding a new member to a respective Local's MTP database
3. Member Change Authorization process and signature form
4. Email and text message profile notifications

5. Online access for a member to update their profile information via the LIUNA Chicago Membership Portal login page: <https://mtp.chicagolaborers.org>

How should Locals handle a membership Local assignment dispute?

A: Use the following District Council guidelines when handling a Local assignment dispute between Locals:

- If there are any instances when a member's Local assignment is in question
 - The respective Locals should attempt to work out between themselves
- If the Locals agree that a change is to be made to the member's assigned Local
 - Inform the District Council of the change and the District Council will direct a change to their Contribution Accounting System (CAS) and MTP.
- If the Locals cannot come to a resolution in the dispute
 - Contact the District Council Business Manager and a determination will be made

IMPORTANT: In the instances above, only the District Council has authority to make changes to the database systems. The Training Center, InCom/MTP support staff, or anyone else has no authority to change a member's Local assignment in the MTP databases.

Who can make Local assignment or Social Security number (SSN) changes in MTP?

If there is a membership Local assignment discrepancy/dispute or an SSN change/update, only the District Council, with proper documentation, has authority to make changes to the LIUNA Chicago MTP database. Please contact the District Council with any questions or concerns.

IMPORTANT: In the instances above, only the District Council has authority to make changes to the database systems. The Training Center, InCom/MTP support staff, or anyone else has no authority to change a member's Local assignment or SSN in the MTP databases.

What is the process for a Local to change a Social Security number (SSN) on a member?

Before a Local can change an SSN for a member (incorrect to correct or a merge) in MTP, you must have proper SSN documentation that is shared with District Council and LIUNA International.

Seven steps must be followed to successfully transfer the membership profile (demographic info, hours earned, training class certifications, and Paid Thru Date, etc.) from an incorrect SSN to a correct SSN.

1. Member submits the following SSN change documentation forms to the Local
 - a. Signed Dues Checkoff and Authorization form
 - b. Signed District Council Declaration and Agreement of Indemnification form
 - c. Signed Laborers' Pension Fund Affidavit of Social Security Number Change

- d. *If needed* – Signed Laborers’ Pension Fund Affidavit of Name Change
2. Local shares copies of the following SSN change documentation to the District Council
 - a. Copy of a Local signed letter on local letterhead requesting the SSN change
 - b. Copy of a member’s signed Dues Checkoff form
 - c. Copy of a member’s signed District Council SSN change declaration form
 - d. Copy of a member’s signed Laborers’ Pension Fund Affidavit of Social Security Number Change
 - e. *If needed* – Copy of a member’s signed Laborers’ Pension Fund and Affidavit of Name Change
3. District Council updates the Contribution Accounting System (CAS) with the correct SSN
4. District Council updates MTP with the correct SSN (see page 13)
5. District Council calls the Local to confirm SSN changes were made
6. Local updates MTP with the correct SSN (see page 13) while on the phone with District Council
7. Local informs LIUNA International with an SSN Change form sent by secure message to the General Secretary-Treasurer Office Accounting Representative

PROCESS NOTE: The Employment Authorization Document (EAD) or Lawful Permanent Resident (LPR) application process, which is conducted by USCIS, is separate from Social Security and the Funds cannot rely solely on the EAD or LPR documents to merge (or correct) work records under different SSN. (source: June 15, 2023, Memorandum from District Council’s James P. Connolly, Business Manager)

MTP NOTE: The District Council must change the SSN first in MTP. If the Local changes the SSN in MTP before the District Council does, a new duplicate individual will be created. In addition, the member will have a disconnected “Shadow Profile” of their incorrect SSN in MTP. Shadow Profiles must be avoided.

At Health & Welfare, what are the procedures to change a Social Security number (SSN)?

To begin, the burden of producing the proper SSN change documentation falls upon the member.

LIUNA Chicago’s Laborers’ Health and Welfare Department and Pension Department (THE FUNDS) require specific types of SSN change documentation from the Social Security Administration.

THE FUNDS will complete the transferring of hours (from the incorrect SSN to the correct SSN) once the member provides the following four forms:

1. Social Security Administration letter showing the new SSN
2. Copy of new SSN card
3. Earnings Summary Sheet or L191 Statement**
4. Signed Health & Welfare Enrollment Card/Sheet
5. Signed/Updated Health & Welfare Annual Claim Form
6. Signed and Notarized Health & Welfare SSN Change Affidavit

** For a member to consolidate their earnings history into the correct SSN, they will need to provide the Social Security Administration with all the tax forms and W2s from years of service under the incorrect

SSN and request them to be merged under the correct SSN. After the hours have transferred to the correct SSN, the member needs to request a printed copy of the Earnings Summary Sheet or L191 Statement.

To learn more about how changes in an SSN affect eligibility for benefits, [please go to page 12 of the Health & Welfare Plan \(PDF\)](#).

What type of mobile smartphone is needed to scan a Public Directory QR code?

To scan a QR code, you need a smartphone with a camera and, in some cases, a mobile QR code reader app. FYI – iPhones running iOS 11 (or later) and Androids running Android 9 (or later) can scan a QR code when the camera is turned ON.

MTP Capabilities

What membership profile information is bi-directional synchronized in MTP?

1. Title or a pre-suffix to first name
2. First name
3. Middle name or initial
4. Last name
5. Post suffix to last name
6. Address (Primary) – Street/City/State/Zip + Extension
7. Alternative address – Street/City/State/Zip + Extension
8. County
9. Phone number
10. Miscellaneous number
11. Mobile number
12. Email address
13. T-shirt Size
14. Race (DOL)
15. Ethnic Group (DOL)
16. Gender (DOL)
17. Veteran Status
18. Member photo
19. Birth date
20. Change history

Additionally, the following membership profile information is shared one way, from a respective Local to the Training Center:

- Card Number
- Local Membership Type
- Local Membership Status
- Paid Thru Date

What profile information can be updated on the Membership Portal?

A: Only the following common demographic information can be updated on the LIUNA Chicago Membership Portal <https://mtp.chicagolaborers.org>:

1. Title or a pre-suffix to first name
2. First name
3. Middle name or initial
4. Last name
5. Post suffix to last name
6. Address (Primary) – Street/City/State/Zip + Extension
7. Alternative address – Street/City/State/Zip + Extension
8. County
9. Phone number
10. Miscellaneous number
11. Mobile number
12. Email address
13. T-shirt Size
14. Race (DOL)
15. Ethnic Group (DOL)
16. Gender (DOL)
17. Veteran Status

In MTP, what are the (DOL) selections for race, ethnic group, and gender?

- Race (*select one or more*): White, Black or African American, Asian, American Indian or Alaskan Native, Native Hawaiian or Other Pacific Islander.
- Ethnic Group (*select one*): Yes – I am Hispanic or Latino, No – I am not Hispanic or Latino.
- Gender (*select one*): Male, Female, Non-binary/third gender, Prefer not to say.

Are (DOL) selections for race, ethnic group, and gender required for all members?

For apprenticeship, YES – it is a Department of Labor (DOL) requirement to report this information as specified. When a member changes information – at the Local or online via the Membership Portal – on their membership profile, NO.

Can members edit their own (DOL) selections for race, ethnic group, and gender?

Members can edit their Department of Labor (DOL) selections on the Membership Portal at any time. The U.S. Office of Management and Budget guidelines state DOL selections are based on self-identification. In addition, members may choose to report more than one racial group and/or select an ethnic origin.

What profile information is read-only on the TC's Membership Portal and Public Directory?

The following information, tracked and managed by the respective Local and Training Center (TC), is read-only on the LIUNA Chicago Membership Portal <https://mtp.chicagolaborers.org> and via a member's Public Directory URL.

- Training Center (TC)
 - TC Type
 - ADDED BY LOCAL – the default Type when a Local profile is synced up to the TC
NOTE: ADDED BY LOCAL is changed to JOURNEYWORKER at the TC by a District Council MTP user only when proper paperwork is inserted into MTP under the **Documents** tab.
 - APPRENTICE
 - GRADUATED APPRENTICE
 - JOURNEYWORKER
 - Apprenticeship Level
 - Skills
 - Monthly Apprentice Reports
 - Class Registration
 - Contractor Hours, plus Date, Contractor Name and Number, and Local Number – imported from the Contribution Accounting System (CAS)
- Local
 - LIUNA Chicago Membership Card with QR Code
 - Local Type (relative to each Local)
 - Local Status
 - ACTIVE will display as ACTIVE
 - PARTIAL PAYMENTS will display as NOT ACTIVE
 - NEW BUT NOT FULLY INITIATED will display as NOT ACTIVE
 - Paid Thru Date

What does it mean if you cannot view a member's profile on the Public Directory?

When a member's **Public Directory URL** cannot be viewed and the message "**This individual is not active in LiUNA Chicago**" is displayed, the Training Center's **Status** on the member is set to something other than **ACTIVE**.

- A list of Training Center Statuses (not Local Statuses) with their Public Directory access:
 - **Yes – ACTIVE**
 - No – BANNED FROM THE TF
 - No – DECEASED
 - No – TERMINATED FROM APPRENTICE PROGRAM

FYI: If a Local cannot view the Public Directory URL of a member, please contact the Training Center at info@liunactaf.org (this email is sent to multiple staffers at the TC).

What does the TC Membership Type ADDED BY LOCAL mean on the Public Directory?

It is important that the Locals understand the ADDED BY LOCAL Training Center Membership Type.

The **ADDED BY LOCAL** Membership Type is the TC's default membership type when all new members are added by the Local in their MTP database and then synced to the Training Center. You can view a member's Training Center's Membership Type, along with other read-only field-specific information, on the member's Public Directory URL.

If your member has the TC Membership Type of **ADDED BY LOCAL** and you would like their TC Type to be changed to **JOURNEYWORKER** or **TRAVELER**, the following steps must be completed:

- Contact District Council Kate Hughes at khughes@liunachicago.org.
- Requested documents must be inserted under the **Documents** tab using the correct Document Sync types for the following exceptions:
 - i. Experienced Employee Exception
 - ii. Newly Organized Employer Exception
 - iii. Transfers
 - iv. Traveler for instructions

FYI: To learn more about inserting a document under the **Documents** tab, see the section: [When to Use and Insert Sync Document Types – Examples and Ownership](#).

For Locals – When to add a new member to their Local MTP database

It is important for Locals to understand who is responsible for adding a new member to MTP and what documents to insert into MTP under the Documents tab.

Required documents:

- A scanned copy of their Social Security Card needs to be inserted under the **Documents** tab using **SS CARD (SYNC)**.
- A scanned copy of their Driver's License needs to be inserted under the **Documents** tab using **DRIVER LICENSE (SYNC)**.

A new member is defined by a unique Social Security number (SSN), which has never existed within the LIUNA Chicago MTP bi-directional system. Locals are responsible for adding a new member to MTP when they have one of the following four membership situations:

1. Experienced Employee Exemption

- Contractor uses the following online TC application: [Contractor Apprenticeship Exemption Form for Experienced Employees](#).
- Understand the [Experienced Worker Exemption Requirements \(PDF\)](#) provided by the TC that covers the following and more:
 - Became a member of LIUNA before January 2, 2020 (see requirements PDF above).
 - Total of # hours performed (see requirements PDF above).
 - Completed any other LIUNA apprentice program or other Building Trades apprentice program.
- The Experienced Employee is added to the Local's MTP database as a Journeyworker.
- Submit a scanned copy of **Dues Checkoff and Membership Authorization** during the MTP Change Authorization step to add demographic information.
- Email notifications sent to the Local from the Exemption Review Team to be inserted under the **Documents** tab using **MEMBERSHIP DOCUMENTATION (SYNC)**.

2. Newly Organized Employer Exemption

- District Council approves the submitted Employee List provided by the Employer/Contractor during the Newly Organized Employer Exemption process.
- The employee is added to the Local's MTP database as a Journeyworker.
- Submit a scanned copy of **Dues Checkoff and Membership Authorization** during the MTP Change Authorization step to add demographic information.
- Email notifications sent to the Local from the Apprenticeship Exemption Review Team to be inserted under the **Documents** tab using **MEMBERSHIP DOCUMENTATION (SYNC)**.

3. Transfers

- Local must email the District Council and the Training Center of the newly added transfer.
- After the transfer visits the Local, they are added to the Local's MTP database as a Journeyworker using their Transfer in Date.
- Submit a scanned copy of the **Dues Checkoff and Membership Authorization** during the MTP Change Authorization step to add demographic information.

- Requested documents, as needed, to be inserted under the **Documents** tab using **TRANSFER DOCUMENTATION (SYNC)**.
 - LIUNA Officers Site Member Status.
 - Minimum of 2400 documented and approved Contractor Hours outside District Council (Incoming only).
 - Transfer Card signed by both Locals (Incoming and Issued).

4. Travelers

- You can add a new Traveler to your Local MTP only when that member has a unique Social Security number (SSN) – a number that has never existed within the LIUNA Chicago MTP bi-directional system.
 - **Check** if the Traveler exists within District Council by using the MTP **Search At** option and selecting the Public Directory.
 - **Add New Member** fields for a Traveler being added to MTP (see screenshot below)
 - Check **Non Member** (ensures the member is not included in Per Capita)
 - Membership Type: **TRAVELER**
 - Status: **INACTIVE**
 - Local Initiation Date: **Hide**
 - Check **Permit SMS** (default until the member unsubscribes from SMS)
 - **Add** demographic information by submitting a scanned copy of the **Dues Checkoff and Membership Authorization** during the MTP Change Authorization step. In the Member Type section, state **“Traveler”** and **“from Local XXXX”** (see screenshot below).

- View the real-time **Local Assignment** indicator
 - A real-time status field based on the Local Assignment at the TC:
 - **MY LOCAL** (Green): The member is assigned to your Local, and your Local will receive working dues (see screenshot above)

- Save and attach an International Officer Site **Membership Query** result (as a Sync Document PDF under the Documents tab) to verify the **Status** and **Home Local**.

International Officer Site Membership Query

Search Criteria

To search by Member ID, enter the ID below and hit 'Enter' or click 'Search'.

Member ID : 4464311

To search by the fields below, enter any combination and click the 'Search' button. Results may take a few seconds to appear.

First Name :
First Name, First Initial, or First few letters of first name

Last Name :
Last Name, Last Initial, or First few letters of last name

SSN/SIN :
Full SSN/SIN or last 4 digits

Local :
Status ☒ All ☐ Good Standing

Q SEARCH

Search Results

Note: Some fields will only display information for members of locals you manage

Member ID	First Name	Last Name	Status	Status Date	Local	Apprentice	Retired	SSN	DoB
4464311	Nicholas	Green	Good Standing	01/20/2020	0041	No	No	*****	*****

EXISTING TRAVELER NOTE: For existing Travelers, on the other hand, if the TRAVELER already exists at the Training Center, their SSN is in MTP, so you will not be able to add them to your Local MTP.

- In the case of an existing TRAVELER, you will still have to submit a **Dues Checkoff and Membership Authorization** and wait for your next month's close-of-business Local-specific CAS-to-MTP file to import into MTP. After the import, the out-of-district Traveler's profile, contractor, and contractor hours will be in MTP.

For the Training Center – When to add a new member to the TC MTP database

It is essential for the Local to understand who is responsible for adding a new member to MTP, specifically an apprentice or a permit worker.

The Training Center (not the Local) is responsible for adding a member in the following three situations:

1. Mandatory Apprentice
2. Permit Worker Exception—A Permit Worker can only work up to 500 hours in a calendar year (i.e., Jan 1/1 through Dec 12/31). Employers will be limited to no more than one Permit Worker for every 10 Laborers they employ, except that employers with less than 10 Laborers can sponsor one Permit Worker.
3. Peak-time Permit Worker Exception – the same rules for Permit Worker apply to a Peak Permit Worker except during the months of May through Sep; there is no limit of Peak Permit Workers an employer can have.

FYI: A new member is defined by a unique Social Security number (SSN) – a number that has never existed within the LIUNA Chicago MTP bi-directional system.

APPRENTICE/PERMIT WORKER PROCESS:

- I. Direct the Contractor to the TC website to understand the terms of the Mandatory Apprentice or Permit Worker Programs:
 - a. **For an Apprentice**, send the Contractor the following web page: [Employer Referral to Apprentice Program](#).
 - b. **For a Permit Worker**, send the Contractor the following web page: [Permit Worker](#).
- II. Contractor then submits an apprentice/permit worker online application using one of the following TC application forms:
 - a. Apprentice online applications:
 - i. [Contractor Sponsored Apprenticeship Application](#)
 - b. Permit Worker online application
 - i. [Contractor Sponsored Permit Worker Application](#)
 - c. Peak-time Permit Worker online application:
 - i. [Contractor Sponsored Peak Permit Worker Application](#)
- III. The Apprenticeship Review Team (District Council, Training Center, and Pension & Welfare) receives and reviews all submitted contractor applications. Once the individual is assigned to a Local, the Local will receive email notifications regarding the progress of the apprentice/permit worker application – i.e. approved or denied.
- IV. After successful completion of the Training Center's onboarding process, the individual is approved to become an apprentice/permit worker.
- V. Training Center adds the newly approved member to the TC MTP database, along with the required onboarding documentation and demographic information.
- VI. Training Center directs the newly approved member to make a visit to their assigned Local.
- VII. Local onboards the newly approved member by completing required local paperwork and educating them on union procedures and benefits.
- VIII. Local adds the approved member to their Local MTP database.

IMPORTANT – **If the above process for an apprentice/permit worker is started in reverse order** – i.e. the Local adds the member to their MTP database first – all required TC onboarding documentation and demographic information will have to be added manually, which is unproductive and wastes time for both the TC and the Local.

What are the online security measures in place for the Membership Portal?

The following security measures are in place to keep membership profile data secure and safe:

- Encrypted HTTPS connection on the web
- Two-factor authentication - a secure push notification to either a mobile phone via text message or your email address
- Unique password
- Login timeout after 10 minutes of inactivity

How to request and receive a reprinted LIUNA Chicago Membership Card for a member?

There are two ways for Locals to track and receive a reprinted membership card for a member:

1. **Reprint MTP Card Flag** – To request a reprint of a member's LIUNA Chicago Membership Card, because of damage or loss, the Local or Training Center can check the bi-directional "Reprint MTP Card" flag. With this flag checked, a new membership card will be printed for the member in the first week of each month.
2. **Updated Headshot in MTP** – When a new or updated headshot is added to a member's profile in MTP, the "Reprint MTP Card" flag is automatically checked. With this flag set, a new membership card will be printed for the member in the first week of each month.

Additional notes:

Printing and Distribution – On the first Monday of every month, members that have the "Reprint MTP Card" flag checked will be on the list to have a new LIUNA Chicago Membership Card printed at the Training Center or District Council. The process of printing membership cards will happen in the first week of each month. Once the cards are printed, each Local will have their member's cards mailed to them for distribution.

Apprentices – It's the Training Center's responsibility to make sure all new apprentices have a new membership card with a headshot photo. Apprentices usually receive their LIUNA Chicago Membership Card on the first day of class or within the first week of each month when the Reprint MTP Cards are processed, whichever comes first.

Permit Workers – Same process as Apprentices. Permit Workers will usually receive their LIUNA Chicago Membership Card during their two-day permit worker training or within the first week of each month when the Reprint MTP Cards are processed, whichever comes first.

Exemptions – Since it's the Local's responsibility to add members that are exempt or allowed to bypass Mandatory Apprenticeship into their MTP database, it's also the Local's responsibility to take a new headshot photo of that member so the "Reprint MTP Card" flag is automatically checked – see Printing and Distribution above.

What are the three ways a member can update their profile information?

1. **Visit Local office** – Members can visit their respective local, request a membership profile change, and sign a required **Signature Confirmation** form before the update can be saved in MTP. For security and data sharing purposes with the Laborers' Pension & Welfare Funds of Chicago and Vicinity and Fox Valley Laborers Benefit Funds, a member's signature is required for all in-person profile information updates.
NOTE: Another acceptable form with a signature is the Dues Checkoff and Authorization form (for new members)
2. **Over the phone with the Local** – The Local office initiates the Change Authorization process within MTP and selects the appropriate **Two-Factor Authentication** option to send and receive the Confirmation Number to the member. Once the Confirmation Number is stated by member and entered in by the Local, this option becomes the digital consent for the update.
3. **Online** – A member can visit the LIUNA Chicago Membership Portal login page <https://mtp.chicagolaborers.org>, log in with their credentials, review their profile information, and update their profile as needed.

How do you track and manage an invalid address when direct mail is returned?

Check the **Invalid Address** option to track when a member's address comes back as invalid after a direct mail piece has been returned from the USPS.

Now that this option is bi-directional, all LIUNA Chicago affiliates will be notified. By tracking "invalid addresses," they can be removed from future direct mail campaigns to save money on postage.

Plus, when members log into the Membership Portal, they will be notified that their address was flagged as "invalid." Once their address is updated (at the Local office or via the Membership Portal), the Invalid Address option will automatically be turned OFF.

How does MTP check a member's Social Security number (SSN) and Paid Thru Date?

When adding a member to MTP, a real-time database cross-check is performed on the member's SSN to verify whether the number already exists in the LIUNA Chicago MTP database.

After the member's SSN is entered and cross-checked with the existing SSNs, the LIUNA Chicago MTP database will display an informational window stating the conditions under which you can add that member to a Local MTP database.

The following checks will occur when adding a member into MTP:

1. If the SSN **DOES NOT** exist in the LIUNA Chicago MTP database:
 - a. The new member **CAN** be added to the Local's MTP database.

2. If the SSN **DOES** exist in the LIUNA Chicago MTP database – MTP verifies the current assigned Local and Paid Thru Date of the member:
 - a. If the Paid Thru Date is past 12 months, the member **CAN** be added to the Local's MTP database.
 - b. If the Paid Thru Date is less than 12 months, the member **CANNOT** be added to the Local's MTP database.
 - c. If the Paid Thru Date is blank, *typically in the case of a Traveler or a New Member who has not been initiated*, the member **CANNOT** be added to the Local's MTP database.

For 2c (above), the Paid Thru Date is "blank":

1. Please submit a **Dues Checkoff** form to the District Council.
2. Once the proper Local assignment has been determined, the District Council will have the correct Local assignment made to their Contribution Accounting System (CAS).
3. Download and import the monthly **Local-specific CAS data file** into the Local's MTP database.
4. After the import, the member in question with a "blank" Paid Thru Date will automatically be added to the respective Local.

In the Membership Portal, what are the three requirements for a new password?

- Password must be different from the current password
- Password must contain both letter and number characters
- The minimum length for a password is 3 characters

Will you be notified if a member updates their profile on the Membership Portal?

A1: To see when a member has updated their profile via the Membership Portal, cross reference the **Change History** tab with the new **Change Authorization** tab, this will show how the member confirmed their identity for the update – i.e. by text or email address.

A2: When an address, phone number or email address change has occurred on the Membership Portal, the "Changed Demographics" flag will be checked automatically for LIUNA International Per Capita Reporting.

What demographic fields in MTP have formatting rules?

On both the MTP desktop client and the Membership Portal, the following data entry fields provide formatting rules:

- Phone number fields – Phone, Mobile, and Misc. – Numerical characters only. Don't allow for duplicates. Only allow for dashes. Phone numbers can be entered without spaces or dashes.
- Address field – USPS characters only: / and #
- City field – Alpha characters only
- State field – Alpha characters only, in a two-letter state format
- ZIP code field – Numerical characters only, in a five or five plus four-digit extension
- Email address field – Only allow properly formatted email addresses with no spaces

How to confirm if your Local member has the correct Local assignment at the Training Center?

Use one of the following options below to confirm if your member has the correct Local assignment (and is one-to-one) at the Training Center (TC).

- From a Local's MTP desktop, can you click the QR code icon and view the member's Public Directory by selecting Open in Browser.
 - If you can view it, then the local assignment is one-to-one.
 - If you cannot view it, that member is not assigned to your Local at the TC.
- Scan the QR code on the member's LIUNA Chicago membership card and verify the Local number on the member's Public Directory.
- Execute **Tools > Update from Training Center** – the Local assignment field will be updated to the Local assignment from the TC.
- Execute **Tools > Resend Data to Training Center** – if a window says you're "prohibited" from updating, then the member is not assigned to your Local at the TC.
- View the real-time **Local Assignment** indicator
 - A real-time status field, based on Local Assignment at the TC, will visually tell you if the member you have loaded on your Membership Screen is assigned to your Local. The indicators are named:
 - **MY LOCAL** (Green): The member is assigned to your Local, and your Local will receive working dues.
 - **OTHER** (Red): The member is assigned to another Local and your Local will NOT receive working dues.
 - **UNKNOWN** (Yellow): This member has not been assigned to a Local at the TC (or DC).
 - **TIP:** When you have an **OTHER** (Red) Local Assignment indicator, use **Tools > Update from Training Center** and select **Member Local** to update to the Local assignment from the TC. See the screenshot below.

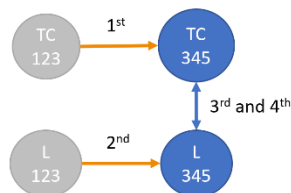
A screenshot of a software window with a list of checkboxes. The checkboxes are arranged in two columns. The first column contains: 'Member work process hour totals', 'Member veteran', 'Member name', and 'Member address'. The second column contains: 'Member county', 'Member invalid address', 'Member reprint membership card', 'Member card number', and 'Member local'. The 'Member local' checkbox is highlighted with a red rectangular box. At the bottom of the window are three buttons: 'OK', 'Cancel', and 'Help'.

Guidelines, Tips and Best Practices

One- and -multiple page documents to review, share, and print.

Please go to the next page.

Procedure in MTP for Changing a Social Security Number (SSN) on a Member



If and when a member's SSN has been entered incorrectly, District Council must make the SSN correction first in Training Center's MTP, followed by the respective Local in their MTP. Following this order ensures the successful profile transfer of hours earned, training class certifications, and Paid Thru Date from the incorrect SSN to the correct SSN.

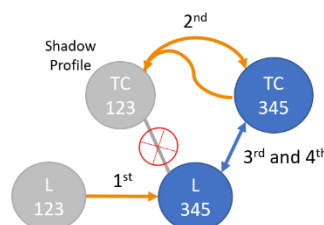
This is a **1 to 1 situation** – one profile at the Training Center and one profile at the Local.

REMINDER: Only the District Council, with proper documentation from the Local, has the authority to change a member's SSN in the Training Center's database. If the Local tries to correct the SSN before the District Council, a **Shadow Profile** will automatically be created (unknowingly) in the Training Center's MTP.

The steps to follow...

- District Council calls the respective Local on the phone regarding the member. Together, they decide and confirm on the correct SSN for the member.
- **FIRST**, District Council in MTP searches for the incorrect SSN of the member.
- **SECOND**, the District Council corrects the existing SSN to new SSN in MTP.
 - Select the three-dot menu next to the SSN field.
- **THIRD**, on the Local side, the Local searches in MTP for the incorrect SSN of the member.
- **FOURTH**, on the Local side, the Local makes the SSN correction in MTP on that member.
 - Select the three-dot menu next to the SSN field.
- **FIFTH**, on the Local side, the Local runs **Tools > Resend Data to Training Center**.
- **SIXTH**, on the Local side, the Local runs **Tools > Update from Training Center**. Uncheck all options on the right-hand side except **Member training ID number**.

Procedure in MTP to Delete & Merge a Shadow Profile and Change the SSN



When a Local accidentally uses/enters a wrong SSN when adding a new member in MTP, they move too fast and try to correct the situation locally by modifying the SSN. But when a Local makes an SSN correction, a **Shadow Profile** will automatically be created (unknowingly) in MTP at the Training Center.

This is a **2 to 1** situation – two profiles at the Training Center and one profile at the Local.

When a member's SSN has been changed first on the Local side, the District Council must take the time to **delete & merge** the **Shadow Profile** and correct the SSN on the Training Center side. This procedure is important for two reasons: 1) keeps MTP clean of duplicate profiles and 2) ensures that a member's profile, training & contractor history, and per capita data is linked together correctly in the LIUNA Chicago MTP database.

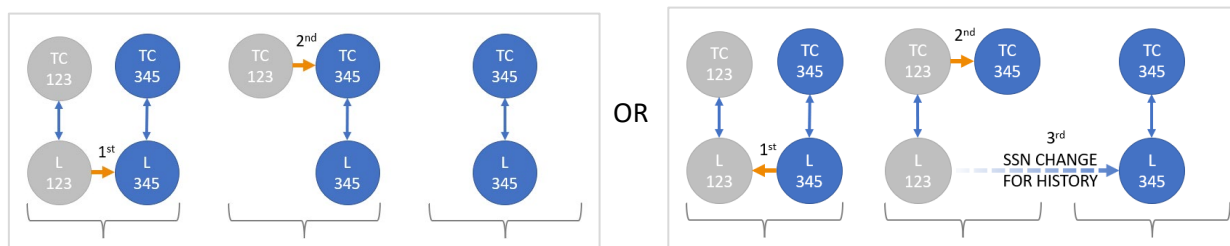
REMINDER: For all SSN changes in MTP, the District Council must change the SSN first. If the Local makes the SSN correction first, before the District Council, a **Shadow Profile** will automatically be created (unknowingly) in MTP at the Training Center.

The steps to follow...

- District Council calls the respective Local on the phone regarding the member. Together, they decide what SSN is correct and which profile to delete/merge. Ideally, they want to keep the profile with the best MTP history (i.e., skills) or Training ID Number.
- FIRST, District Council selects **Tools > Merge** and selects the correct SSN profile (to keep). Under the Merge delete section, they search and find the incorrect SSN profile they want to delete. There are two options:
 - **Merge:** Keep the correct SSN and delete the incorrect SSN profile
 - **Reverse Merge:** Keep the incorrect SSN and delete the correct SSN profile. After that is done, change the SSN on the existing profile (the incorrect SSN) to the correct SSN.
- FOURTH, on the Local side, the Local searches for the member's profile (the correct SSN)
- FIFTH, on the Local side, the Local runs **Tools > Resend Data to Training Center**.
- SIXTH, on the Local side, the Local runs **Tools > Update from Training Center**. Uncheck all options on the right-hand side except **Member training ID number**

At this point, we have a **1 to 1** situation – one profile at the Training Center and one profile at the Local.

Procedure in MTP to Delete & Merge Two Profiles and Track SSN Change in Change History



These are **2 to 2** situations – two profiles at the Training Center and two profile at the Local.

Option 1) Accidental Entry – A member will have two profiles (gray and blue) in MTP when a Local accidentally uses an incorrect SSN (gray) when adding a new member. Then to correct the situation, the Local adds another new member to MTP with the correct SSN (blue). This situation typically happens when there is an apprentice that already exists at the Training Center. In this situation you, documenting the incorrect SSN in Change History is not needed.

Option 2) Discovery of Two Profiles – You will have one bi-directional profile with the correct SSN (blue) and another bi-directional profile with the incorrect SSN (gray) between the Local and the Training Center. To track the SSN change on the Local side, merge the correct SSN (blue) with the incorrect SSN (gray) and finally do an **SSN Change** to document the incorrect SSN changing to the correct SSN in Change History.

The steps to follow...

- District Council calls the respective Local on the phone regarding the member. Together, they decide on what profile to keep, what profile to delete/merge, and the following:
 - Confirm on the correct SSN for the member.
 - Confirm on the MTP Training Center ID Number to use moving forward.
 - Keep the profile that has the most up-to-date demographics and MTP history
- **FIRST**, on the Local side,
 - Option 1) The Local will search and find the correct SSN profile (to keep) in MTP.
 - Option 2) The Local will search and find the incorrect SSN profile in MTP.
- **SECOND**, on the Local side,
 - Option 1) Select **Tools > Merge** in MTP. Under the Merge delete section, search and find the incorrect SSN profile (to delete).
 - Option 2) Select **Tools > Merge** in MTP. Under the Merge delete section, search and find the correct SSN profile. NEXT, the Local performs an **SSN Change** and updates the incorrect SSN to the correct SSN so that the change is documented in Change History.

Continue to next page

Now we have a **2 to 1** situation – two profiles at the Training Center and one profile at the Local.

- **THIRD**, District Council selects **Tools > Merge** and selects the correct SSN profile (to keep). Under the Merge delete section, they search and find the incorrect SSN profile they want to delete. Ideally, they want to keep the profile with the best MTP history (i.e., skills) or Training ID Number.
- There are two options:
 - **Merge**: Keep the correct SSN and delete the incorrect SSN profile
 - **Reverse Merge**: Keep the incorrect SSN and delete the correct SSN profile. After that is done, change the SSN on the existing profile (the incorrect SSN) to the correct SSN.
- **FOURTH**, on the Local side, the Local searches for the member's profile (the correct SSN)
- **FIFTH**, on the Local side, the Local runs **Tools > Resend Data to Training Center**.
- **SIXTH**, on the Local side, the Local runs **Tools > Update from Training Center**. Uncheck all options on the right-hand side except **Member training ID number**

At this point, we have a **1 to 1** situation – one profile at the Training Center and one profile at the Local.

What's the Purpose of the New LIUNA Chicago Membership Card?

The following four benefits are the purpose of the new LIUNA Chicago Membership Card. However, this card does not replace the International Membership Card or International Card Number.

1. **View your Public Directory using your smartphone** – Your new LIUNA Chicago Membership Card contains a square QR code with your new ID Number printed below it. Scan your QR code with your smartphone to view your Public Directory. Business Agents and Field Representatives can also scan the QR code to verify your membership profile, Local Membership Status, and Paid Thru Date.
2. **Access your membership profile** – Scroll down to the bottom of your Public Directory (see #1) and click the **Login Page** tab. This will take you to Membership Portal login page <https://mtp.chicagolaborers.org>.
 - a. Log in to the Membership Portal using your ID Number or International Card Number, which are listed on your Public Directory (see #1).
 - b. Your **first-time password** is set to the last four digits of your Social Security number. After you log in, with your first-time password, *you will be required to change/reset it*.
 - c. If you forgot your password, click **Forgot Password** on the login page.
3. **Review your profile information** – Once you're logged, click the **three gray bars** (in the upper right-hand side on a smartphone) and/or select the **profile tabs** to review your address, phone numbers, Training Center skills and class registrations, and a digital version of your membership card.
 - a. If your membership card **does not include your photo or your photo needs to be updated**, please come into your local office or one of the training centers to have your photo taken and added to your profile.
 - b. Please take the time to make sure your profile information is **accurate and correct**.
4. **Edit your profile information** – To edit your profile, such as your address or phone number, click the three gray bars and select the **Edit Profile** tab.
 - a. Before you can edit your profile, your identity needs to be verified with a confirmation number.
 - b. Your confirmation number can be received in one of two ways: text message or email.

Need more help?

Learn how to log in and update your profile, in English or Spanish, by clicking the links at the bottom of the Membership Portal login page <https://mtp.chicagolaborers.org>.

If you are having any issues with the Membership Portal, please contact the Training Center at info@liunaclaf.org or your local office.

How to Fix Membership Portal Login Issues?

The following are steps to correct and fix when a member is having issues with logging into the Membership Portal. The two issues are:

1. Can't log in with International Card Number or ID Number and their password (first-time password or previous password)
2. Member successfully used **Forgot Password** but still can't log in with newly updated password

In both cases above, please follow the steps below to fix the Membership Portal issue.

1. Local searches and finds the member in the MTP desktop
2. Local then executes **Tools > Update from Training Center** and checks all options to retrieve the member's data from the Training Center
3. Local calls the Training Center to reset the member's password back the first-time password which is the last four digits of their Social Security number.
 - a. *If the Training is unavailable to reset the member's password, follow steps #4 and #5 and then go to #6c – click Forgot Password**.*
4. Local send the member their membership information in one of the following two ways:
 - a. *If the member doesn't have a valid email address, add one. Email address is a free field and doesn't require a signature; therefore the member will receive a **Profile Email Notification***
 - b. *If the member has a valid email address saved, send the member an email with their **Public Directory URL** via the QR code icon*
5. Local contacts the member and directs them to use the Profile Email Notification or the Public Directory URL to find and click the Membership Portal login page
<https://mtp.chicagolaborers.org>.
6. Once the member is on the login page, direct them to
 - a. Log in to the Membership Portal using their ID Number or International Card Number, which are listed on their Profile Email Notification or Public Directory.
 - b. Use their first-time password is set to the last four digits of your Social Security number. After they log in, with their first-time password, *they will be required to change/reset it.*
 - c. If they forgot their password, have them click **Forgot Password**** on the login page.

** If the member is able to change his/her password via "Forgot Password", we know the profile information in MTP is correct.

***If there are still login issues after following the step above, the only login conflict left would be:

- Data being entered incorrectly
- Web browser "caching" issues where data or passwords are automatically and accidentally being used to log into the Membership Portal.

For Members – Tips on How to Use the Membership Card and Membership Portal

The following tips are **for members** when using the new digital capabilities of the LIUNA Chicago Membership Card and Membership Portal.

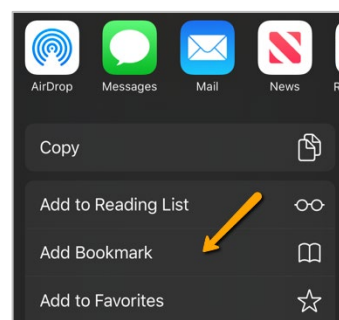
How can you view your Public Directory, on your mobile device, if you have your membership card?

A: Scan the QR code on your membership card with your mobile smartphone's camera or QR code reader app.



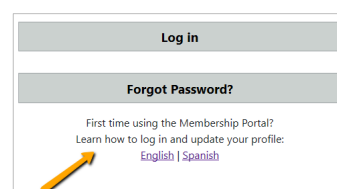
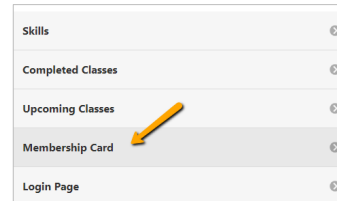
How to save your Public Directory URL for easy retrieval

- After you are viewing your Public Directory, save the Public Directory URL as a bookmark or an icon on the home page on your mobile device or desktop computer.
- Use a mobile QR code reader app that tracks QR codes you have recently scanned.
- Save a photo or screenshot of your membership card's QR code so you can send it via text message or email.



How can you update your profile information, such as your address, on the Membership Portal?

1. View your Public Directory by scanning your membership card's QR code.
2. Save your Public Directory URL for easy retrieval (see the tips above).
3. Once you can view your Public Directory on your mobile device, click the three gray bars in the upper right-hand corner and select Menu > **Login Page**.
4. If needed, learn how to log in and update your profile, in English or Spanish, by clicking the links at the bottom of the Membership Portal login page <https://mtp.chicagolaborers.org>.
5. Log in to the Membership Portal using your ID Number or International Card Number, which are listed on your Public Directory.
6. Your first-time password is the last four digits of your Social Security number. Once you log in, with your first-time password, *you will be required to change it*.
7. If you forgot your password, click **Forgot Password** on the login page.



For Locals – Tips on How To Use the Member Card and Membership Portal

The following tips & tricks are for **Locals and field representatives** when using the new digital capabilities of the LIUNA Chicago Membership Card and Membership Portal.

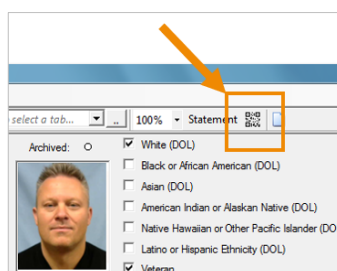
How can you view a member's Public Directory, on your mobile device, if they have their membership card?

A: Scan the QR code on their membership card with your mobile smartphone's camera or QR code reader app.



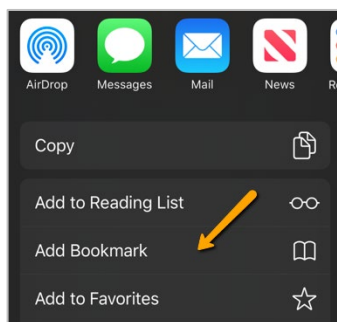
If the member doesn't have their membership card with them, how can you view their Public Directory on your mobile device?

A: Ask your Local's office to copy the member's Public Directory link (known as a web address or URL) and send it to you via text message or email. The URL can be found by clicking the Public Directory icon in MTP desktop program.



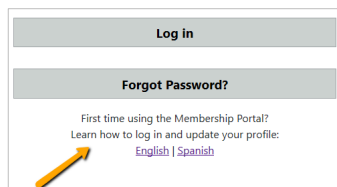
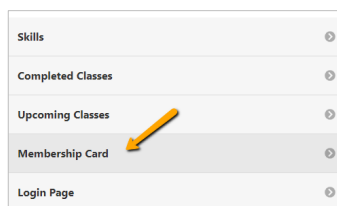
How can you track or manage multiple Public Directory links for easy retrieval?

- Save the member's Public Directory link as a bookmark on your mobile device or desktop computer.
- Use a mobile QR code reader app that tracks QR codes you have recently scanned.
- Ask the member to send you a photo or screenshot of their membership card via text message or email.



How can you help a member update their profile information, such as their address, on the Membership Portal?

1. Receive the member's Public Directory link from your Local's office – sent to you via text message or email.
2. View the member's Public Directory on your mobile device and click Menu > **Membership Card**.
3. Have the member scan their card QR code or share their Public Directory link with them via text message or email.
4. Show the member how to save their Public Directory link as a bookmark on their mobile device for future access.
5. Once the member can view their Public Directory on their mobile device, have them click Menu > **Login Page**.
6. Walk them through the "how to" guide on the Login Page.
7. Once they're logged in, show them how to use two-factor authentication to securely update their profile online.



Guidelines and Tips for Taking Membership Headshots at the Local or On-site

Membership headshots play a very important role in the success of the LIUNA Chicago Membership Card and the ability to scan a member's Public Directory QR code**.

Membership headshots in LIUNA Chicago MTP database are bi-directional between the Training Center and the respective Local. Hence, if a Local or the Training Center updates a member's headshot in MTP, the headshot will be updated automatically and in the Public Directory.

On the first Monday of every month, the Training Center/District Council will print and distribute (two weeks later) membership cards to Locals for members whose headshots were added or updated in MTP.

LIUNA Chicago Membership Card



Good Headshot



Unacceptable Headshot



Please use the following guidelines for taking an on-site photo and cropping it to be uploaded into MTP. These guidelines will ensure that the Membership Card (physical or digital) is a valuable communication tool for Business Agents, Training Center instructors, Contractors, etc.

Headshot basics:

1. Take indoors, if possible, and away from direct sunlight.
2. Photograph the member in front of a solid color backdrop like a wall, or plain white or off-white poster board, to make the face stand out.
3. Ask the member to remove their eyeglasses, unless they are non-tinted prescription glasses.
4. Ask the member to take off their hat.
5. Capture the member looking directly at the camera with their head centered, not tilted, and with a neutral expression or natural smile. Eye contact is important for a great headshot. If non-tinted prescription glasses are worn, make sure there is no reflective glare.
6. Frame the headshot from the chest up.
7. Ensure good lighting on the member's face. Beware of weird shadowing.
8. Use a digital camera or mobile smartphone with a clean and smudge-free camera lens.
9. Use a clear image of the member's face. Do not use filters commonly used on social media.

**** To scan a QR code, you need a smartphone with a camera and, in some cases, a mobile QR code reader app. FYI – iPhones running iOS 11 (or later) and Androids running Android 9 (or later) can scan a QR code when the camera is turned ON.**

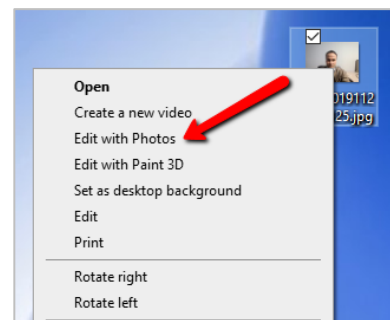
Guidelines and Tips for Cropping a Headshot Before Uploading to MTP

The following tips & tricks steps are for Locals when they're cropping a member's photo into a headshot before it's uploaded into MTP.

1. Save the headshot photo (JPG/JPEG image file) to the computer's desktop.

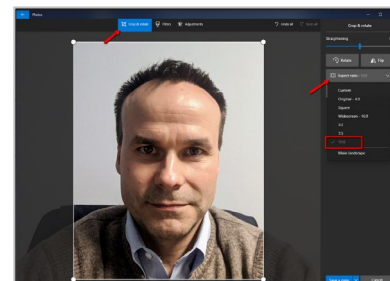


2. Right-click on the photo and open the image file with a Windows built-in application to edit images, such as Photos.

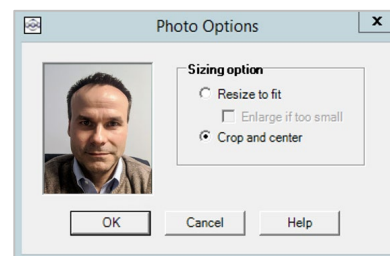


3. Once the image file is opened and the photo is ready to be edited, use the photo editing tools such as **crop** and **rotate** to frame the headshot in a portrait layout.

TIP: On Windows 10, use a portrait aspect ratio of **10:8**



4. After you have cropped the photo into a portrait layout headshot, save the image file back to the computer's desktop.
5. Open MTP, find the member, and upload their new headshot
6. After the image file is uploaded to MTP, use the **Crop and center** sizing option to adjust the headshot.



How to Run the Local Member Assignment at Training Center Report

Follow the instructions below to learn how to run the Local Member Assignment at Training Center Report in MTP and verify if all your ACTIVE status members are correctly assigned to your Local at the Training Center.

The three reasons why each Local needs to run this report monthly on your ACTIVE status Local members are to:

- 1) Verify bi-directional synchronization on your members, 2) Ensure that your members are receiving MCL Benefits, and 3) Verify that your Local is receiving 100% of your locally-assigned work dues from District Council.

Run the report and email the results to District Council

This report will verify if all of your ACTIVE status members are correctly assigned to your Local at the Training Center – i.e., one-to-one with local assignment.

REMINDER: One-to-one with local assignment in MTP for LIUNA Chicago determines:

- MTP bi-directional synchronization
- MCL benefits for your members
- Working dues distribution to the correct Local

How to run the report:

- 1) Go to the MTP pop-down menu and select **Reports > Membership Reports > Local Member Assignment at Training Center Report** or in the **Search menus** box, in the upper right-hand corner of MTP, type “local assignment” and select **Local Member Assignment at Training Center Report** (Image 1).
- 2) Under the **Report** section, check **Unassigned Members** (Image 2).
- 3) Under the **Membership Type to include:** section, select **Check All** (Image 2).
- 4) Under the **Statuses to include:** section, only check: **ACTIVE** (Image 2).
- 5) Select **Mask first 5 digits of SSN** (Image 2).
- 6) Click **OK** (Image 2).
- 7) Save the PDF report to your computer.
- 8) If the window, **No information is available for this report** pops up (Image 3), take and save a screenshot of the pop-up window to your computer.
- 9) Email either the [PDF report](#) (or the [screenshot](#)) to Kate Hughes khughes@liunachicago.org at District Council and David Szostak david.szostak@diamond-strategies.com.

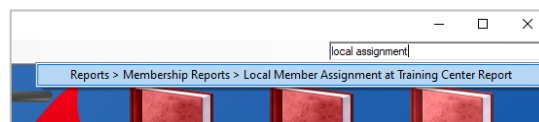


Image 1

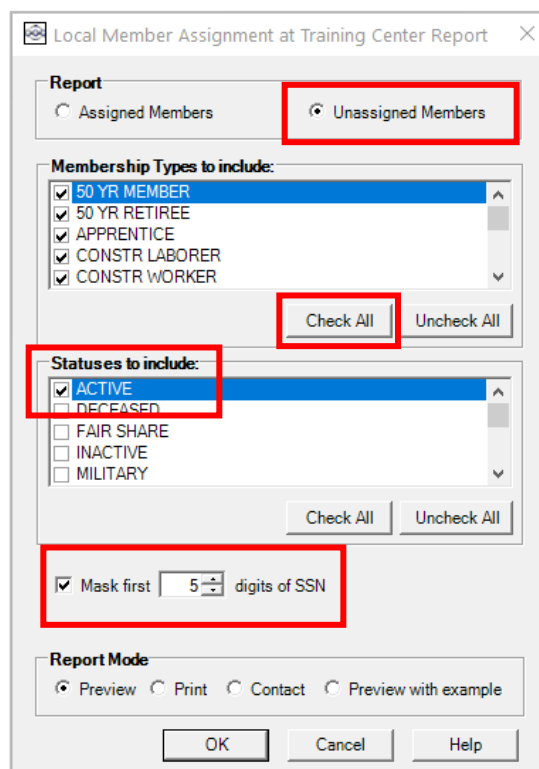


Image 2

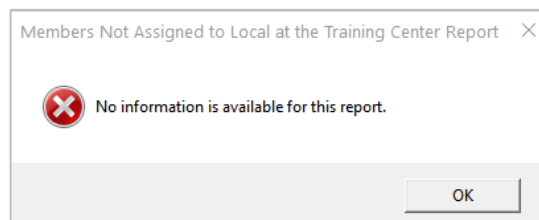


Image 3

Understand How To Use Sync Documents Types

MTP, inside the **Documents** tab, can manage and share documents internally with Local staff and Sync Documents externally with the Training Center (TC). This capability is called “Sync Documents” and it allows for Locals and the TC to be more productive, save time, and go digital/paperless.

Note that Sync Document Types are created at the Training Center.

When inserting a document into MTP to be synced with the Training Center, select the appropriate Sync Document Type (see the chart below).

Regular shared Document Types are NOT shared between a Local and the Training Center – no SYNC post suffix.

Mapping/Associating Training Center Document Types with Local Document Types

The 21 Sync Document Types below are also created by the TC and have been associated locally in your MTP Documents tab. The Sync Document Types can synchronize specific documents both ways – from the Local to the TC Hub and vice versa.

When a Local creates a type in the Documents tab that is not associated with a TC type (“NONE”), the uploaded document will only be shared internally with your Local staff. Hence, associate the correct type when you need to “sync” a document in MTP.

(See the next page for the Mapped/Associated Training Center Document Types Chart)

Mapped/Associated Training Center Document Types Chart

Description	Training Center Document Type	Owner
BIRTH DATE CHANGE (SYNC)	BIRTH DATE CHANGE (SYNC)	LOCAL
DUES CHECKOFF AND MEMBERSHIP AUTHORIZATION (SYNC)	DUES CHECKOFF AND MEMBERSHIP AUTHORIZATION (SYNC)	LOCAL
LOCAL CHANGE (SYNC)	LOCAL CHANGE (SYNC)	LOCAL
MEMBER DOCUMENTATION (SYNC)	MEMBER DOCUMENTATION (SYNC) Added on Mar 12, 2023	LOCAL
MILITARY DOCUMENTATION (SYNC)	MILITARY DOCUMENTATION (SYNC)	LOCAL
NAME CHANGE (SYNC)	NAME CHANGE (SYNC)	LOCAL
NON-LIUNA ASBESTOS SUPERVISOR CERTIFICATE (SYNC)	NON-LIUNA ASBESTOS SUPERVISOR CERTIFICATE (SYNC)	LOCAL
NON-LIUNA ASBESTOS WORKER CERTIFICATE (SYNC)	NON-LIUNA ASBESTOS WORKER CERTIFICATE (SYNC)	LOCAL
NON-LIUNA HAZARDOUS WASTE CERTIFICATE (SYNC)	NON-LIUNA HAZARDOUS WASTE CERTIFICATE (SYNC)	LOCAL
NON-LIUNA LEAD SUPERVISOR CERTIFICATE (SYNC)	NON-LIUNA LEAD SUPERVISOR CERTIFICATE (SYNC)	LOCAL
NON-LIUNA LEAD WORKER CERTIFICATE (SYNC)	NON-LIUNA LEAD WORKER CERTIFICATE (SYNC)	LOCAL
RETIRED DOCUMENTATION (SYNC)	RETIRED DOCUMENTATION (SYNC)	LOCAL
SSN CHANGE (SYNC)	SSN CHANGE (SYNC)	LOCAL
TRANSFER DOCUMENTATION (SYNC)	TRANSFER DOCUMENTATION (SYNC) Add on Jul 23, 2021	LOCAL
APPRENTICESHIP DOCUMENTATION (SYNC)	APPRENTICESHIP DOCUMENTATION (SYNC)	TC
CONTRACTOR DOCUMENTATION (SYNC)	CONTRACTOR DOCUMENTATION (SYNC) Added on Sep 27, 2021	TC
EXEMPTION DOCUMENTATION (SYNC)	EXEMPTION DOCUMENTATION (SYNC) Added on Aug 23, 2022	TC
PERMIT WORKER DOCUMENTATION (SYNC)	PERMIT WORKER DOCUMENTATION (SYNC)	TC
WAGE NOTICE (SYNC)	WAGE NOTICE (SYNC)	TC
DRIVER LICENSE (SYNC)	DRIVER LICENSE (SYNC)	BOTH
SS CARD (SYNC)	SS CARD (SYNC)	BOTH

Note 1: The Sync Document Types above have already been created and associated to the TC document types in your MTP Documents tab.

*Note 2: See the **When to Use and Insert Sync Document Types – Examples and Ownership** chart below.*

Best Practice – Standard File Name Format

As a best practice, when a Document is inserted into MTP (Training Center or Local), please use the following file name format for all your Synced (and Non-Synced) documents/paperwork:

[Last Name], <space> [First Name] <space> [TC ID Number] <space>
[Dash Symbol] <space> [Description]

SMITH, JOHN 7654321 – DUES CHECKOFF AND MEMBERSHIP AUTHORIZATION

[Contractor Name] <space> [Contractor Number] <space>
[Dash Symbol] <space> [Description]

A-1 EXCAVATING 12345 – LETTER FROM CONTRACTOR TO LOCAL

Best Practice – Name your file on the Desktop before you insert it into MTP

1. First, scan and save the file to your Desktop
2. Rename the file using the **Standard File Name Format** (see above)
3. In MTP, under the Documents tab, insert your file
4. Select Browse and find your file on the Desktop
5. By using the **Standard File Name Format**, the **Description** field will automatically populate with the inserted file
6. After inserting the file under the Documents tab (synced or non-synced), you can delete the file from your Desktop

Best Practice – Save to Desktop, Name, Insert, and Delete after Inserting into MTP

- Then, **Insert** it under the MTP Documents tab – MTP will automatically copy the file to your **Default Folder**. FYI: Your folder location is found in **System Settings > General** with “Copy” flag turned ON.

Example Situations – Inserting Synced Document in MTP:

- **Inserted by the Local**
 - New members – e.g. Dues Checkoff and Membership Authorization form
 - Exemptions
 - Local transfers documents
- **Inserted by the Training Center**
 - Apprentice documents
 - Permit Worker documents
- **Inserted by the District Council**
 - SSN changes
 - Merging or fixing member profiles

When to Use and Insert Sync Document Types – Examples and Ownership

Local Use Only – Document sharing with the DC and Training Center

SYNC Document Types	When to Use	Example Document(s) to be Inserted (PDF)	Owner
BIRTH DATE CHANGE (SYNC)	Local Sharing with the District Council and Training Center: <ul style="list-style-type: none"> Required by LIUNA International DC has to make the change if and when a member updates their birth date in MTP 	<ul style="list-style-type: none"> Birth Date Corrections from LIUNA International 	LOCAL
DUES CHECKOFF AND MEMBERSHIP AUTHORIZATION (SYNC)	Local Sharing with the District Council: <ul style="list-style-type: none"> New member at the Local – Apprenticeship Exemption, Permit Worker, Transfer In, and new Traveler Reinstating (out more than a year) at the Local Local change within the District Council 	<ul style="list-style-type: none"> Dues Checkoff and Membership Authorization Form 	LOCAL
LOCAL CHANGE (SYNC)	Local Sharing with the District Council: <ul style="list-style-type: none"> Members that are out more than a year and have membership already in our District Council LIUNA Officers' Site documentation for the TRAVELER, JOURNERYWORKER, APPRENTICE, PERMIT WORKER 	<ul style="list-style-type: none"> Dues Checkoff and Membership Authorization LIUNA International Membership Status CAS Contractor Hours 	LOCAL
MEMBER DOCUMENTATION (SYNC) Repurposed in April 2024. Renamed from MCL DOCUMENTATION (SYNC) to MEMBER DOCUMENTATION (SYNC).	Local and District Council Sharing: <ul style="list-style-type: none"> MCL Death Benefits Form for when a member is "in good standing" and passes away LIUNA International documentation regarding a TRAVELER or JOURNERYWORKER LIUNA Officers' Site documentation regarding a TRAVELER or JOURNERYWORKER Email Notifications from the DC, TC, or a Local regarding a JOURNEYWORKER, PERMIT WORKER, or TRAVELER Email Correspondence from DC, the TC, another Local, the member, a contractor, or any other entity regarding membership or union topics. 	<ul style="list-style-type: none"> Death of Member Letter Member's Obituary MCL Death Benefits Form PDF of LIUNA International Membership Status LIUNA International Local Assignment LIUNA International Card Number TC email notification of assigned apprentice TC email notification of an exemption TC email notification of apprenticeship onboarding review TC email notification of permit worker membership type Contractor email regarding a member Email correspondence or email threads with any person/entity regarding a member 	LOCAL
MILITARY DOCUMENTATION (SYNC)	Local Sharing with the District Council and Training Center: <ul style="list-style-type: none"> Documents regarding military service 	<ul style="list-style-type: none"> Military Orders – Leave, Return and/or Discharge Email to LIUNA for Military Stipend Follow-up email from LIUNA granting the Stipend 	LOCAL
NAME CHANGE (SYNC)	Local Sharing with the District Council: <ul style="list-style-type: none"> Member changes their name – legal reasons or marriage 	<ul style="list-style-type: none"> Dues Checkoff and Membership Authorization Change Name, Phone and Address Report Name Changes Form from LIUNA International 	LOCAL
NON-LIUNA ASBESTOS SUPERVISOR CERTIFICATE (SYNC)	Local Sharing with the Training Center: <ul style="list-style-type: none"> Certification not provided by the District Council's Training Center 	<ul style="list-style-type: none"> Initial Training Certificate and/or current Certificate 	LOCAL
NON-LIUNA ASBESTOS WORKER CERTIFICATE (SYNC)	Local Sharing with the Training Center: <ul style="list-style-type: none"> Certification not provided by the District Council's Training Center 	<ul style="list-style-type: none"> Initial Training Certificate and/or current Certificate 	LOCAL
NON-LIUNA HAZARDOUS WASTE CERTIFICATE (SYNC)	Local Sharing with the Training Center: <ul style="list-style-type: none"> Certification not provided by the District Council's Training Center 	<ul style="list-style-type: none"> Initial Training Certificate and/or current Certificate 	LOCAL



NON-LIUNA LEAD SUPERVISOR CERTIFICATE (SYNC)	Local Sharing with the Training Center: <ul style="list-style-type: none"> • Certification not provided by the District Council's Training Center 	<ul style="list-style-type: none"> • Initial Training Certificate and/or current Certificate 	LOCAL
NON-LIUNA LEAD WORKER CERTIFICATE (SYNC)	Local Sharing with the Training Center: <ul style="list-style-type: none"> • Certification not provided by the District Council's Training Center 	<ul style="list-style-type: none"> • Initial Training Certificate and Current Certificate 	LOCAL
RETIRED DOCUMENTATION (SYNC)	Local Sharing with the District Council and Training Center: <ul style="list-style-type: none"> • Approved retirement information from Pension 	<ul style="list-style-type: none"> • Approved Pension Notification Letter 	LOCAL
SSN CHANGE (SYNC)	Local Sharing with the District Council: <ul style="list-style-type: none"> • Member changes their Social Security number (SSN) <p>IMPORTANT: <u>Before you change an SSN in MTP, the Local must first insert SSN documentation in MTP. Second, the District Council must change the SSN in MTP first, then the Local.</u> Please read "What is the process for a Local to change a Social Security number (SSN) on a member" section of the Chicago MTP Manual for more information.</p>	<ul style="list-style-type: none"> • Dues Checkoff and Membership Authorization • Declaration and Agreement of Indemnification Form from District Council • New SSN Card and Earnings Summary Sheet or L191 Statement • SSN Forward/Corrections from LIUNA International 	LOCAL
TRANSFER DOCUMENTATION (SYNC)	Local Sharing with the District Council: <ul style="list-style-type: none"> • Member from a Local outside the District Council • LIUNA Officers' Site documentation for transfer documentation • Member leaves the District Council • Unused (30 days) Transfer Request 	<ul style="list-style-type: none"> • LIUNA International Membership Status • Transfer Papers (Incoming) • Contractor Hours worked outside of District Council (Incoming only) • Transfer Papers (Issued) or Transfer Papers (Unused) 	LOCAL
OFFICERS' SITE DOCUMENTATION (SYNC) Not used as of April 2024. Use the Sync Document Type, MEMBERSHIP DOCUMENTATION (SYNC).	Local responsibility LIUNA Officers' Site documentation for a TRAVELER, JOURNERWORKER, APPRENTICE, PERMIT WORKER	<ul style="list-style-type: none"> • LIUNA International Membership Status • LIUNA International Local Assignment • LIUNA International Card Number 	LOCAL

Training Center Use Only – Document sharing with the DC and Locals

SYNC Document Types	When to use, required and responsibilities	Example Document(s) to be Inserted (PDF)	Owner
APPRENTICESHIP DOCUMENTATION (SYNC)	Training Center Sharing with the Local: <ul style="list-style-type: none"> All Apprentice documentation that is shared from the Training Center to the Locals and Contractors 	<ul style="list-style-type: none"> Apprenticeship letters (PDFs): completions, warnings, cancelations, etc. 	TC only
CONTRACTOR DOCUMENTATION (SYNC)	Training Center Sharing with the Local: <ul style="list-style-type: none"> Documents received by a contractor to be shared with DC, the Local, and the member 	<ul style="list-style-type: none"> Termination of Employment letters (PDFs) for an apprentice Intent to Hire letters (PDFs) Reschedule Requests (PDFs) 	TC only
EXEMPTION DOCUMENTATION (SYNC)	Training Center Sharing with the Local: <ul style="list-style-type: none"> Documents from the Training Center to be shared with DC, the Local, and the member 	<ul style="list-style-type: none"> Exemption letters (PDFs): Mandatory Apprentice Program (MAP) or assessment results from the District Council and Training Center 	TC only
PERMIT WORKER DOCUMENTATION (SYNC)	Training Center Sharing with the Local: <ul style="list-style-type: none"> Permit Worker and Peak Permit Worker Review Team – Assigns Member to Local 	<ul style="list-style-type: none"> Permit Worker and Peak Permit Worker Warning letters (PDFs) 	TC only
WAGE NOTICE (SYNC)	Training Center Sharing with the Local: <ul style="list-style-type: none"> Training Center emails the Wage Notice to notify the Member, Local, and Contractor of a wage change Training Center inserts the Wage Notice in MTP for apprentice management and tracking and the Local 	<ul style="list-style-type: none"> Apprentice Wage Notices (PDFs): 60%, 70%, 80%, 90% and 100% Permit Worker Wage Notice (PDFs): 100% 	TC only

Any Entity – Document sharing for all entities

SYNC Document Types	When to use, required and responsibilities	Example Document(s) to be Inserted (PDF)	Owner
DRIVER LICENSE (SYNC)	Training Center responsibility: <ul style="list-style-type: none"> <u>New Apprentice</u> in the Mandatory Apprenticeship Program Local responsibility: <ul style="list-style-type: none"> <u>New Member at the Local</u> – Apprenticeship Exemption, Permit Worker or Transfer In 	<ul style="list-style-type: none"> Driver License (JPG or PDF) 	BOTH
SS CARD (SYNC)	Training Center responsibility: <ul style="list-style-type: none"> <u>New Apprentice</u> in the Mandatory Apprenticeship Program Local responsibility: <ul style="list-style-type: none"> <u>New Member at the Local</u> – Apprenticeship Exemption, Permit Worker or Transfer In 	<ul style="list-style-type: none"> SS Card (JPG or PDF) 	BOTH

Template – Letter to Members About the LIUNA Chicago Membership Card

(Copy and paste into Word, edit as needed, print on Local Letterhead, and provide to the member)

Dear [NAME OF MEMBER],

Enclosed is your new LIUNA Chicago Membership Card with your new ID Number. If you have an old Training Center ID card and number, this new card replaces it.

However, this card does not replace your International Membership Card or International Card Number.

What can you do with your new LIUNA Chicago Membership Card?

1. **View your Public Directory** – Your new LIUNA Chicago Membership Card contains a square QR code with your new ID Number below it. When scanning your QR code with your smartphone, you will be able to view your Public Directory. Business Agents and Field Representatives can also scan the QR code to review your profile to verify your Paid Thru Date and Local Membership Status.
2. **Access your membership profile** – Scroll down to the bottom of your Public Directory (see #1) and click the **Login Page** tab. This will take you to Membership Portal login page <https://mtp.chicagolaborers.org>.
 - a. Log in to the Membership Portal using your ID Number or International Card Number, which are listed on your Public Directory (see #1).
 - b. Your **first-time password** is the last four digits of your Social Security number. Once you log in, with your first-time password, *you will be required to change it*.
 - c. If you forgot your password, click **Forgot Password** on the login page.
3. **Review your profile information** – Once you're logged in, click the **three gray bars** (in the upper right-hand side) and select the profile tabs to review your address, phone numbers, Training Center skills and class registrations, and a digital version of your membership card.
 - a. If your membership card **does not include a photo of you**, please come into the [LOCAL NUMBER] office or one of the training centers to have your photo taken and added to your profile.
 - b. Please take the time to make sure your profile information is **accurate and correct**.
4. **Edit your profile information** – To edit your profile, such as your address or phone number, click the three gray bars and select the **Edit Profile** tab.
 - a. Before you can edit your profile, your identity needs to be verified with a confirmation number.
 - b. Your confirmation number can be received in one of two ways: text message or email.

Need more help?

Learn how to log in and update your profile, in English or Spanish, by clicking the links at the bottom of the Membership Portal login page <https://mtp.chicagolaborers.org>.

If you are having any issues with the Membership Portal, please contact the Training Center at info@liunacltaf.org or the [LOCAL NUMBER] office at [PHONE NUMBER]

Guidelines and Tips for Using Text Message (8 pages)

Text Message Rollout – Copy and paste into the MTP Submit Text Messages Screen

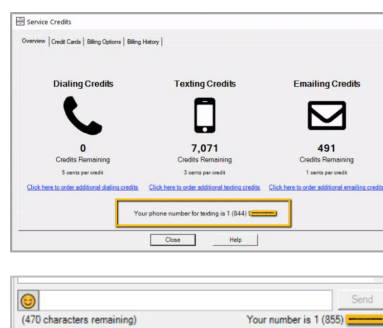
[First Name], this is Name. We are letting you know that XXX-XXX-XXXX is our new office txt msg #. We'll use this # for local meetings, dues, and other reminders. You can use this # to text the office as well.

The text message above is 192 characters (with spaces), not including the personalized mail merge [First Name] and the Name of the person who is sending the message from the Local.

TIP 1 – Where to Find Your Text Message Number?

You can find your permanently assigned Text Message Number in two locations within MTP:

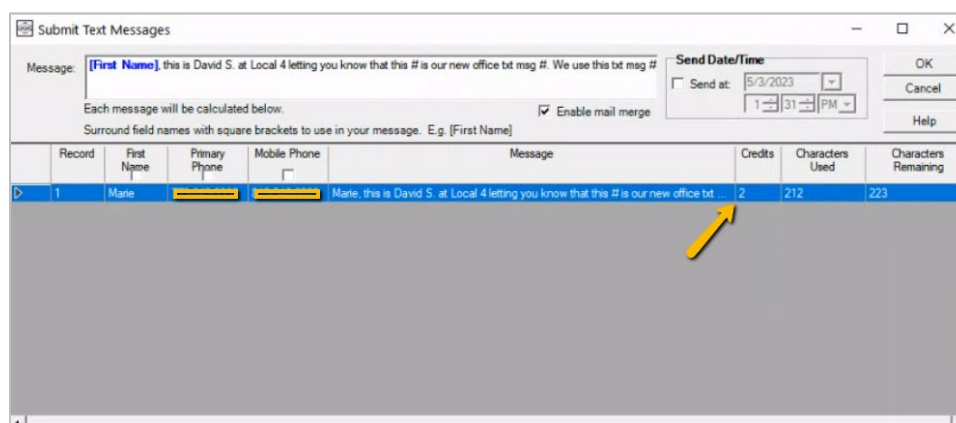
- 1) **Help > Credits > Manage Service Credits**
(bottom of the window)
- 2) The **Text Inbox** icon on the MTP Dashboard
(bottom right-hand side of the screen)



TIP 2 – Cost

Each text message (sent via a batch from a Local's MTP) that is 145 characters or less (including spaces) will cost \$0.03 (1 credit).

With the above text message, plus the personalized first names (which will vary in number of characters), **each text message will be \$0.06 (2 credits).**



TIP 3 – The Training Center or Your Local Text Message Number Never Changes

The text message number that is permanently assigned to the Training Center or your Local never changes and is

connected to MTP. This means members can (and should) save those text message numbers as contacts on their mobile phone, so they conveniently recognize them as legitimate sources.

TIP 4 – Members Can Send Text Messages to the Training Center or the Local

The other benefit of a permanently assigned text message number connected to MTP is the capability for members (or contractors) to send their own text messages to the Training Center or Local – at no extra cost. Text messages that are sent to the Training Center or Local from a member will be received, flagged for notification, and track automatically (per individual). You can also respond to those text messages within MTP via the **Text Inbox**, so you do not have to share your personal mobile phone number and can keep it private.

TIP 5 – One Text Message Sent per Mobile Phone Number

Only one text message will be sent (and charged) if the same mobile phone is listed under two different profiles (e.g., a father and son have the same mobile phone number saved under their profiles).

TIP 6 – Adding URLs in the Text Message

When adding a URL (website address) to a text message you will need to add <http://> or www before the website's domain name. For example: <http://liunachicago.org> (CORRECT) or www.liunachicago.org (CORRECT). In most cases, using www is best because it uses the least number of characters.

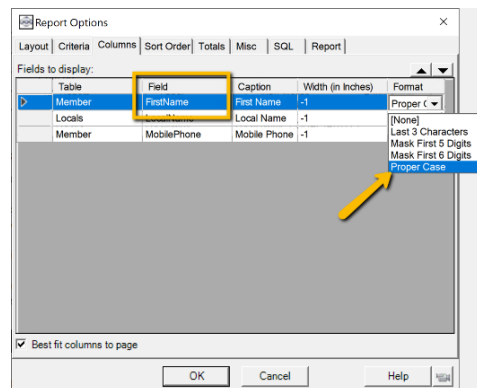
TIP 7 – How to Start a Batch Text Message?

Here are the general steps for a simple batch text message to multiple members:

- 1) Create a list of members
 - a. Option A: Add them to a **Label Queue** manually – and do this before proceeding to Step 2
 - b. Option B: Run a **User Defined Report** based on criteria, i.e., only ACTIVE members
- 2) Go to **Tools > User Define Reports...**
- 3) Double-click the **First Name** field to highlight it green, which means that it's selected
- 4) Double-click the **Phone** and **Mobile Phone** fields to highlight them green, which means they are selected.
FYI: We are selecting both just in case a mobile phone number has been saved in the Phone field.
- 5) Follow **TIP 8** (see below) for change the First Name from capitalized letters to Proper Case
- 6) Follow **TIP 9** (see below) if you are going to use a text message a list of members from a Label Queue
- 7) Then go to **File > Text Message...**
- 8) Type or copy & paste your message in the **Message** field with mail merge fields for personalization, e.g. **[First Name]**: first letters must be capitalized and bookended with square brackets.
- 9) Check **Enable mail merge** (on the bottom right-hand side of the Message field)
- 10) Verify that your message and **[First Name]** mail merge field is correct. If not, make corrections accordingly.
- 11) Check the top-level check box for the **Phone** and **Mobile Phone** columns.
FYI: We are selecting both just in case a mobile phone number has been saved in the Phone field.
- 12) Send the batch text message:
 - a. **Option A:** Send immediately by clicking **OK**
 - b. **Option B:** Schedule to send the batch text message by clicking **Send at:** and select a future time & date for the text message to be sent. Always double check your “send” time before clicking OK.

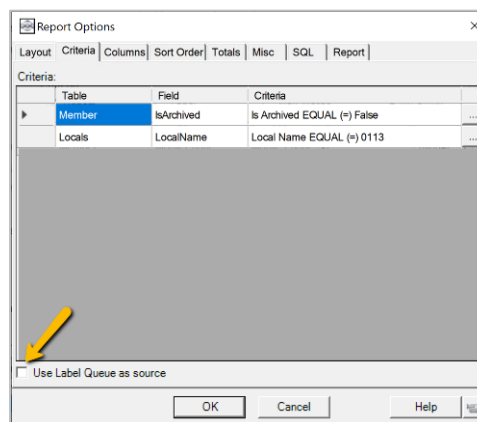
TIP 8 – Proper Case

Before you send the message, set the [First Name] merge field to use Proper Case – View **User Define Report > Options > Report Options > Columns (tab)** – change **[First Name]** mail merge field to Proper Case in the Format pop-down.



TIP 9 – Label Queue or User Define Report Options

You can use the Label Queue or a User Define Report to send batch text messages to selected members. View **User Define Report > Options > Report Options > Criteria (tab)** – check the bottom-left option to use the Label Queue as source for the batch text message list.

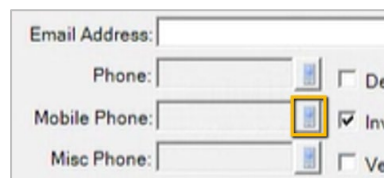


TIP 10 – Move Mobile Phone Numbers to the Correct Field

Over time, it is best to clean up your phone number fields by making sure only mobile phone numbers are saved in the **Mobile Phone** field.

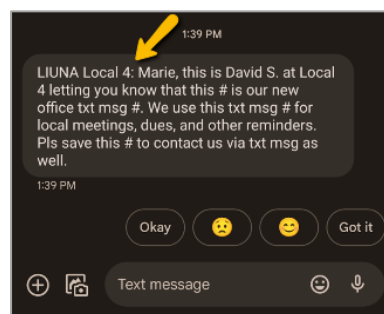
NOTE 1: If you want to send an individual text message, use the Mobile Phone field icon (to the right of the phone number field) on the Membership Screen. See **TIP 1** for the cost of an individual text message.

NOTE 2: Use the **Phone** field only for saving the member's LAND line at home, not their mobile phone number.



TIP 11 – Automatic Pre-text in your Text Message

The automatic pre-text "LIUNA Local 4:", as seen in the example is controlled on the backend of MTP and does not count as additional characters for your text message.



TIP 12 – Verify that the Text Messages were Delivered

To verify which text messages were delivered successfully (or not), use the MTP tool, **Utilities > Check Pending Text Message Batches....** Use this tool to help clean up the phone number fields by viewing the report results.

- **SENT** – Successfully sent and delivered
- **ERROR: LANDLINE**– A LAND line phone number such as a home phone number
- **ERROR** – The mobile phone number no longer has a cell phone plan with a provider such as Verizon or AT&T
- **DO NOT TEXT** – The member has requested to **STOP** text messages (i.e., the **Permit SMS** option is unchecked)
- **CANNOT TEXT** – The phone number is not a valid, mobile or LAND line, or some other delivery error at that time

NOTE 1: Text messages sent or received from a member (or a contractor) can be viewed on the Membership Screen under the **Text Messages** tab and in the **Text Inbox** screen. See **TIP 12 and 13**.

NOTE 2: On the mobile phone of the member (or contractor), they can also use the **"Block this Caller"** feature to block text messages via their cellular provider such as Verizon. A successfully **SENT** message will be displayed under **Check Pending Text Message Batches...** but the message has been blocked on their mobile phone. In this situation, you must contact the individual to specifically **check and unblock** your text message number on their mobile phone.

TIP 13 – View and Track Text Messages Sent or Received from within the Profile's Text Message Tab

To view and track all the text messages sent or received from a member (or contractor), turn **ON** and display the **Text Messages** tab on your Membership Screen. All information within the tab is read-only. If you currently don't have the option to display this tab, please contact MTP Support at (440) 439-7000 for help.

NOTE: Text messages sent or received from a member (or a contractor) will also be displayed in **Text Inbox**. See **TIP 13**.

Text Message Batches

Batches (Double-click to view)

Entry Date/Time	Cashier	Entries	Start Date/Time	Completion Date/Time	Message
5/3/2023 1:39 PM	OFF	2		5/3/2023 1:39 PM	(First Name), this is David S. at

5/3/2023 11:47 AM Page 1 of 4

LABORERS' INTERNATIONAL UNION OF NORTH AMERICA

Text Message Batches

LIUNA LOCAL 4

Work shifts am/pm in Local 41-Cleveland Cliffs - Indiana Wage Rates apply-Must pass drug test - If successful call Frank@773-376-8888

Record	Primary	Mobile	Seconda	Referral	Deletion	Insertion	InsertSe	FirstNa	LastNa	CardNo	Message	Message
1		773-367-773-606	1		1/1/1799	1/13/201	1	MICHA	NICHOL	0004078	SENT	5/3/2023
2		708-795-708-256	1		1/1/1799	2/3/2020	1	FRANK	NOVAK	0004363	ERROR	5/3/2023
3		773-344	1		1/1/1799	2/24/202	1	FLOREN	ANAYIA	0003982	SENT	5/3/2023

Edit Tab Categories

Press insert to add new category. Drag and drop tabs into categories as desired.

Categories:	Tabs:
Contractor	Dates
Contractor Hours	Documents
Comments	Emails
Dates	Imported Training Hours
Documents	Meeting History For Apprent
Skills	Membership Level History
Transcript Details	Monthly Apprentice Reports
Training ID Number History	Paid Thru Dates
Transcript Summary	Paperwork
Web Module Login History	Payment History
CRM	Phone Calls
Emails	Previous Skill Certificates
Phone Calls	Schedule
Text Messages	Skills
	Text Messages

☒ Sort the tabs to match the order specified by the categories above

☐ Hide any tabs that are not in a category

☐ List tabs in tab selector dropdown alphabetically and uncategorized

OK Cancel Help

TIP 14 – View and Respond to Text Messages Sent and Received from Members

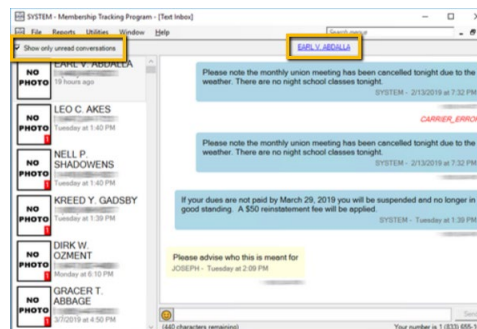
The **Text Inbox** screen allows you to view replies and send responses to incoming text messages. This screen can be accessed from the **Text Inbox** icon on the MTP Desktop or through the menu under **File > Open > Text Inbox**.

NOTE 1: On the top left, uncheck **Show only unread conversations** to view the history of all read (sent and received) text messages.

NOTE 2: In the middle, at the top of the response column, the member's (or contractor's) name is hyperlinked to easily view and open their profile.

NOTE 3: Change the **Text Inbox** default behavior of changing the message to **Read** automatically after it's clicked by going to **System Settings > Text Inbox**. With this option checked (ON), you can now right-click on the member (left-side column) to either **Mark as Unread** or **Mark as Read**.

NOTE 4: Text messages sent or received from a member (or a contractor) will also be displayed under the **Text Messages** tab. See **TIP 12**.



Right-click to Mark as Unread

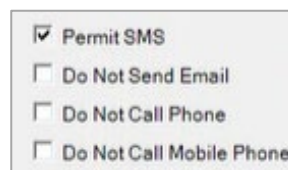


Right-click to Mark as Read

TIP 15 – Manually Turn ON/OFF the Permit SMS Option for a Member

When a member has **requested over the phone or through an email** to stop receiving Training Center or Local text messages, can you manually turn ON/OFF the **Permit SMS** option.

NOTE: Even with the **Permit SMS** unchecked, a member (or contractor) can send their own text messages to the Training Center or Local – at no extra cost.

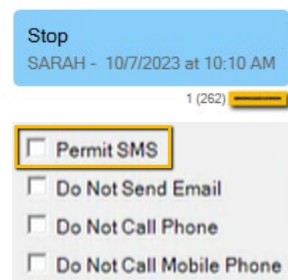


TIP 16 – Members Can Opt-Out with a “STOP” Text Message Reply

When a member replies to the Training Center or a Local text message with the word, **STOP**, the member's **Permit SMS** check box (on the Membership Screen) will be automatically “unchecked”. Hence, they will not receive future text messages. **NO-SMS** will be displayed in the **Submit Text Message** screen.

NOTE 1: Even with the **Permit SMS** unchecked (OFF), **a member can still send text messages to the Training Center or a Local**. The messages will be tracked in the **Text Inbox** and under the member's **Text Message** tab.

NOTE 2: The **Permit SMS** can be manually checked (ON) but the member **must submit a signed Text Message Permission Form** to receive future text messages. See **TIP 17**.



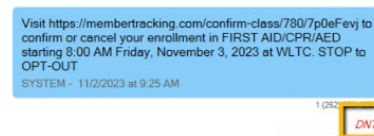
616		708-774-	
617		708-473-	
618		847-514-	
619	NO-SMS	NO-SMS	NO-SMS
620		847-833-	
621		773-965-	
622	847-551-	847-899-	
623		630-744-	

NOTE 3: When you see a red **DNT** indicator in the **Text Inbox** under a sent text message to an individual, the initialism stands for **Do Not Text**.

NOTE 4: On the mobile phone of the member (or contactor), they can also use the **"Block this Caller"** feature to block text messages via their cellular provider such as Verizon. A successfully **SENT** message will be displayed under **Check Pending Text Message Batches...** but the message has been blocked on their mobile phone. In this situation, you must contact the individual to specifically **check and unblock** your text message number on their mobile phone.

TIP 17 – "Do Not Call" Membership Screen Check Boxes for Phone Fields

When you select a **Do Not Call** check box option for any phone field on the Membership Screen, this will unselect and opt-out that phone field for Text Messaging or Robocall features – i.e., this will override the PERMIT SMS option for the specific phone field. **OPTED-OUT** will be displayed in the **Submit Text Message** screen.



<input checked="" type="checkbox"/> Permit SMS
<input type="checkbox"/> Do Not Send Email
<input type="checkbox"/> Do Not Call Phone
<input type="checkbox"/> Do Not Call Mobile Phone
<input checked="" type="checkbox"/> Do Not Call Misc Phone

Record	Primary Phone	Mobile Phone	Secondary Phone
1	773-849- [redacted]	815-546- [redacted]	OPTED-OUT

TIP 18 – How Does a Member Opt-In to Receiving Text Messages?

When a member has requested to stop receiving Training Center or Local text messages, either by asking you directly (over the phone or email) or by replying to the text message number with the word, STOP, there is only one way to make them eligible again to receive individual or batch text messages. The member must sign a **Text Message Permission Form** printed on Local letterhead (see the next page for copy).

NOTE: The **Permit SMS** can be manually checked (ON) but the member must submit a signed **Text Message Permission Form** to receive future text messages.

STEPS:

- 1) Ask the member to sign the **Text Message Permission Form** – See next page
 - a. Scan and save the signed form as a PDF and insert it under the Documents tab on the member's profile
 - b. Contact MTP Support at (440) 439-7000 and email Support the PDF as an email attachment. Once they receive it, they will enable and check the Permit SMS option on the member's profile.
- 2) Ask the member to send a "test" text message from their mobile phone to your text messaging number. Verify that you've received the "test" text message in your **Text Inbox** and under the member's **Text Message** tab. If not,

TEXT MESSAGE PERMISSION FORM

In the ever changing world of technology, we are always looking for better, faster and more efficient ways to connect with our Members. As part of this technology we want to be able to send out text messages to each individual. In order to accomplish this undertaking, we need your written consent to send you messages.

Please fill out the information below to permit us to send you text messages. If you do not complete this written consent form, we will not be permitted to send you the communications necessary for your successful attendance at training.

Name: _____

Cell Phone Number: _____

I hereby give the Laborers and LiUNA permission to send me text messages

Signature

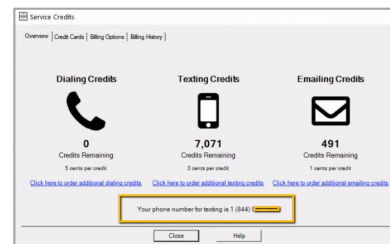
Date

correct the mobile phone number with an over-the-phone Change Authorization in MTP.

- 3) On the mobile phone of the member (or contactor), they can also use the **"Block this Caller"** feature to block text messages via their cellular provider such as Verizon. A successfully **SENT** message will be displayed under **Check Pending Text Message Batches...** but the message has been blocked on their mobile phone. In this situation, you must contact the individual to specifically **check and unblock** your text message number on their mobile phone.

TIP 19 – How to manage Your Robocall, Text Message, and Emailing Credits?

Go to **Help > Credits > Manage Service Credits**. In the Service Credits window, you will also need to add a credit card for reoccurring payments on robocall, text message, or emailing credits.



Template Text Message Permission Form

(Copy and paste into Word, edit as needed, print on Local Letterhead, and provide to the member)

TEXT MESSAGE PERMISSION FORM

In the ever-changing world of technology, we always seek better, faster, and more efficient ways to connect with our members at LIUNA Local XXXX. As part of this technology, we want to be able to send out text messages to each individual. We need your written consent to send you text messages to accomplish this.

Please fill out the information below to permit Local XXXX to send you text messages. If you do not complete this written permission form, we cannot send you Local XXXX communications regarding local meetings, dues, and other reminders.

Name: _____

Mobile Phone Number: _____

I hereby give the LIUNA Local XXXX permission to send me text messages.

Signature: _____

Date: _____

REMINDER: Once the above Text Message Permission Form is signed by the member:

1. Saved the signed form as a PDF and insert it under the **Documents tab** on the member's profile.
2. Please contact MTP Support at (440) 439-7000 and email the PDF to them. Once they receive the PDF, they will be able to check the **Permit SMS** option on the member's profile.

Email Template (Long Version) – How to Update Your Mailing Address

(Copy and paste into Word, edit as needed, print on Local Letterhead, and provide to the member)

Dear [NAME OF MEMBER],

[LOCAL #] is reaching out to you to let you know that your current mailing address on file with LIUNA Chicago came back to us from the United States Postal Service as invalid.

Therefore, we'd like to take this opportunity to show you how to update your mailing address online (with a phone, tablet, or computer).

Please read and follow the instructions below:

1) View your Public Directory – Your new LIUNA Chicago Membership Card contains a square QR code with your new ID Number below it. When you scan your QR code with your smartphone, you will be able to view your Public Directory.

View your Public Directory here: [https://mtp.chicagolaborers.org/MemberDirectory/\[MEMBER ID NUMBER\]](https://mtp.chicagolaborers.org/MemberDirectory/[MEMBER ID NUMBER])

2) Access your membership profile – After viewing your Public Directory (view link above), find and select the Login Page link. It will take you to the Membership Portal Login Page <https://mtp.chicagolaborers.org>.

On the Login Page, log in to the Membership Portal using your ID Number or International Card Number, which are listed on your Public Directory (view link above).

If this is your first visit to the Membership Portal Login Page, your first-time password is the last four digits of your Social Security number. Once you log in, with your first-time password, you will be required to change it.

If you forgot your password, click Recover Password on the Login Page.

3) Review your profile information – Once you're logged into the Membership Portal, select the menu links to view your mailing address, phone numbers, Training Center skills, class registrations, and a digital version of your membership card.

If your membership card does not include a photo of you, please visit your Local office or one of the Training Centers to have your photo taken and added to your profile.

Please take the time to make sure your profile information is accurate and correct.

4) Update your mailing address – To edit your profile on the Membership Portal, such as your address or phone number, click the Edit Profile link. After you've updated your mailing address, click Submit.

SECURITY NOTE: Before you can update your mailing address, your identity needs to be verified with a confirmation number. The confirmation number can be received in one of two ways: text message or email.

Need more help?

Learn all about the Membership Portal, in English or Spanish, by clicking the "How to" links at the bottom of the Membership Portal login page <https://mtp.chicagolaborers.org>.

If you are having any issues with the Membership Portal, please contact the Chicagoland Laborers' Training Center at 630-653-0006.

Email Template (Short Version) – Update Your Mailing Address

(Copy and paste into Word, edit as needed, print on Local Letterhead, and provide to the member)

Dear [NAME OF MEMBER],

[LOCAL #] is sending you this reminder to update your mailing address on file with LIUNA Chicago.

Please read and follow the instructions below to update your mailing address online (with a phone, tablet, or computer):

1) View your Public Directory

Scan the QR code on your LIUNA Chicago Membership Card or click the link below:

Your Public Directory: [https://mtp.chicagolaborers.org/MemberDirectory/\[MEMBER ID NUMBER\]](https://mtp.chicagolaborers.org/MemberDirectory/[MEMBER ID NUMBER])

TIP – Take note of your ID Number or International Card Number because you will need it for step #2.

2) Log into the Membership Portal

Go to the Membership Portal Login Page <https://mtp.chicagolaborers.org> and log in with your ID Number or International Card Number.

If you forgot your password, click Recover Password on the Login Page.

3) Update Your Mailing Address

Click “Edit Profile” after you are logged into the Membership Portal.

As a security measure before you can edit your profile online, verify your identity with a confirmation number that is sent to you by email or text message.

Once verified, please update your mail address as needed and click “Submit” to save your changes.

Need more help?

Learn more about the Membership Portal, in English or Spanish, by clicking the “How to” links at the bottom of the Membership Portal login page <https://mtp.chicagolaborers.org>.

If you are having any issues with the Membership Portal, please contact the Chicagoland Laborers’ Training Center at 630-653-0006.

Computer & Server Hardware Requirements for your Local office and MTP

To improve data security, here are the computer & server hardware requirements for all LIUNA Chicago affiliated Local offices and MTP implementations.

Network Infrastructure

- All-in-one networked printer and scanner – i.e. scan documents to PDFs
- Microsoft Email Exchange Server
 - Microsoft 365 subscription
 - Hosted by a web provider
 - A local Microsoft Email Exchange Server
 - Cannot use free web-based email services such Gmail, Hotmail, or Yahoo
- Backup data hardware with disaster recovery procedures
- 20Mb symmetrical internet connection (or greater)

Desktop Requirements

- Windows 10 Professional (not Windows 10 Home)
- 1.54GHz processor (or greater)
- 8G RAM (or greater)
- 256 GB hard drive
- No less than 4 cores (preferred)
- Ultrasharp landscape 24" or 27" monitor (dual monitors optional)

Server Requirements

- Windows Server 2019
- SQL Express – a free entry-level database for 10 GB of data storage or less
- 2.2GHz processor (or greater)
- 32 GB RAM (or greater)
- SAS drives (preferred) or minimum SSD
- 8 cores (preferred) or minimum 4 cores
- VMware (preferred) for virtualization when one server has both a file server and MTP

Best Practice for Office Productivity and Operations

To improve Local office productivity and operations, here are the requirements for all LIUNA Chicago affiliated Local offices and MTP implementations.

- Domain name with LIUNA – example <https://www.liunalocal140.org>
 - Purchase both .com and .org domains
 - Park and redirect the .com domain so that if someone types .com they will be redirected to your .org domain
- Hosted website – e.g. a landing page at a minimum (and SSL for https)
- Microsoft 365 subscription for office and team productivity
 - Organization domain emails, e.g. david.szostak@liunalocal140.org
 - Interoffice teamwork and communication
 - Interoffice calendaring
 - Secure file storage and sharing via OneDrive (internally and on mobile device)
 - Security and compliance
 - Cannot use free web-based email services such Gmail, Hotmail, or Yahoo
- Server for MTP and member associated documents
- Internet connection – i.e. 20Mb symmetrical connection (or greater)
- Monthly contract with an IT support vendor
- Backup process for data on the server – e.g. onsite or provide by INCOM
- Online and reoccurring Local due payments option via MTP web module
- Scan and associate all documents related to membership in MTP
- Only use the MTP TC ID Number and stop using/saving/sharing/exporting SSNs
- Standardize file naming convention for documents (Training Center or Local) with the MTP TC ID Number

[Last Name], <space>[First Name]<space>[TC ID Number]<space>
[Dash Symbol]<space>[Description]

SMITH, JOHN 7654321 – DUES CHECKOFF AND MEMBERSHIP AUTHORIZATION

How to Submit and Track Your MTP Support

The process and benefits of submitting and tracking your MTP Support issues/questions are as follows:

- **Unified support** – your MTP issue/question will receive a unified support response by using the MTP Support online form. This assures that your MTP **Support Request Ticket (SRT)** is reviewed by everyone in MTP Support, not a single individual.
- **Track all your support requests** – your MTP issue/question can be tracked by you and everyone at MTP Support by using your MTP **Support Request Ticket (SRT)**.
- **Track any bug-related fixes** – When your SRT issue/question cannot be resolved (by phone or email) because a bug in the software has been found and needs to be fixed, MTP Support will create a **Customer Order Request (COR)** so you can track it until it is resolved.

ONLINE FORM RECOMMENDED STEPS

- 1) Visit the MTP Support web page at <https://www.membershiptrackingprogram.com/support>.
- 2) Complete the online MTP Support form by describing your MTP issue/question in the Issue/Question input box. If desired, request a specific MTP Support employee.
- 3) Receive an automated **Request Email** from MTP Support with your MTP **Support Request Ticket (SRT)** for non-bug-related tracking. Save this email, DO NOT delete it. Always reference your **SRT** when communicating with MTP Support.
- 4) Reply to MTP Support using your automated **Request Email** by adding additional details, attachments, screenshots, and CC David Szostak when needed.
- 5) If MTP Support contacts you by phone first regarding your **SRT**, continue to resolve your issue/question while on the phone. Remember to always reference your **SRT** with MTP Support.
- 6) When MTP Support emails you using your automated **Request Email**, continue communicating through email as directed by MTP Support until your MTP issue/question is resolved.
- 7) While communicating with MTP Support, if they cannot solve your issue/question because a bug in the software has been found and needs to be fixed, they will provide you with a **Customer Order Request (COR)** for bug-related tracking.
- 8) If MTP Support has not contacted you by phone or email within 48 hours, use your **Request Email** to reply and ask for a status update on your **SRT** or **COR**.

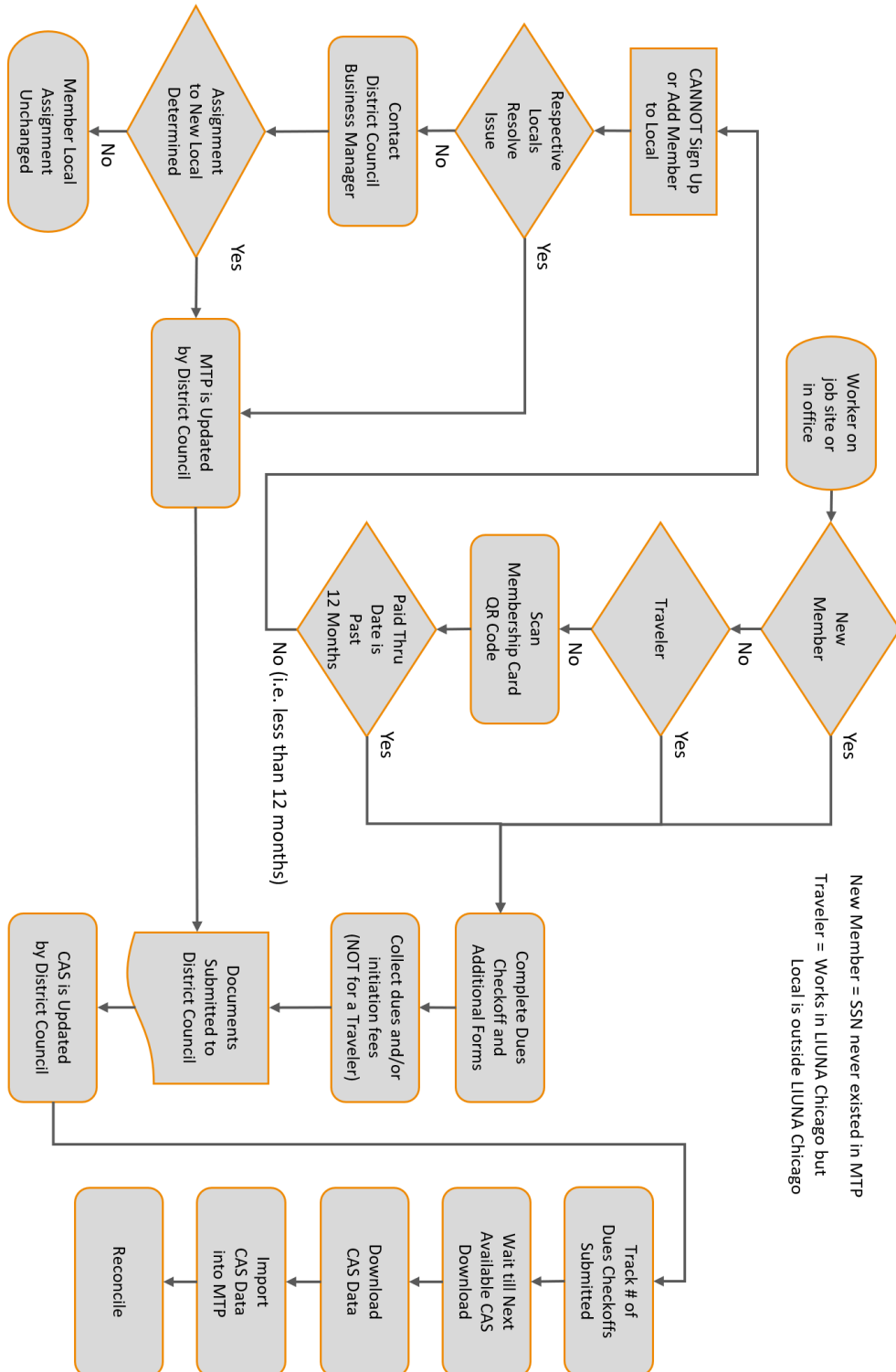
PHONE CALL RECOMMENDED STEPS

- 1) Contact MTP Support by calling (440) 439-7000.
- 2) Phone contact will not automatically generate a MTP **Support Request Ticket (SRT)**.
- 3) While you are on the phone with MTP Support, if they cannot resolve your issue/question, they will provide you with either an **SRT** for non-bug-related tracking or a **COR** for bug-related tracking as needed.

RECOMMENDATIONS

- Initiate your MTP Support requests by using the MTP Support online form (see above) because when you contact (phone or email) MTP Support employees directly an **SRT** is not automatically generated.
- Once you have an **SRT**, you can track and reference it when communicating with MTP Support (phone or email), which is most important in my opinion.
- And in some cases, your **SRT** (non-bug-related tracking) could turn into a **COR** bug-related tracking. Either way, the **SRT** or **COR** will help you track and resolve your MTP issue/question in a timely manner.

Member and CAS to MTP Workflow



Standard Membership Types

See the following two pages.

LIUNA Chicago Standard Membership Types

MTP and CAS Types	Abbreviations	MCL	Descriptions
50 YEAR MEMBER	50 YR MEMBER	Full	50 Year Member exempt from monthly dues who is actively working at the calling.
50 YEAR RETIREE	50 YR RETIREE	Retiree Benefits	50 Year Member exempt from monthly dues who is retired and not working.
APPRENTICE	APPRENTICE	Full	All current Apprentices.
CORPORATE OFFICER	CORP OFFICER	Full	Members of the Fox Valley Fund who are designated to the funds by their employer as independent self-contributors.
ISC	ISC	Full	Members of the Westchester Fund who are designated to the funds by their employer as independent self-contributors.
JOURNEYSWORKER	JOURNEYSWORKER	Full	1) All Laborers with membership, assigned to a local, and <u>future graduated apprentices</u> . 2) New Laborers with no work hours prior to 2020 who are <u>newly organized and exempt from mandatory program</u> as determined by the JATC. 3) New Laborers with no work hours prior to 2020 with work history in LIUNA or other trades and <u>exempt from mandatory programs</u> as determined by JATC.
MATERIAL TESTER I	MTL TEST I	Full	Members who work as Material Testers I (min wage rate \$10.00 below Journeyworker scale).
MATERIAL TESTER II	MTL TEST II	Full	Members who work as Material Testers II (min wage rate \$5.00 below Journeyworker scale).
NON-MEMBER (MTP only)	NON-MEMBER	—	Worker with authorization for work dues assigned to Local, but not currently in active status with Local or a "0000" worker who worked prior to 2020.
PEAK PERMIT WORKER	PEAK PERMIT WORKER	Full	The same rules for Permit Worker apply (see below) to a Peak Permit Worker <u>except during the months of May thru Sep</u> , there is no limit of Peak Permit Workers an employer can have.
PERMIT WORKER	PERMIT WORKER	Full	Permit Worker can only work up to 500 hours in a calendar year (Jan 1/1 thru Dec 12/31). Must be registered by every employer they work for and re-sponsored each year before working in the calendar year. No more than one Permit Worker for every 10 Laborers, except for employers with less than 10 Laborers – they can sponsor one Permit Worker.
PIPELINE	PIPELINE	Full	Members who work in pipeline and are assigned to a Local.
RETIRED	RETIRED	Retiree Benefits	Retiree with retiree only MCL benefits.
SALARIED SUPERVISOR	SALARIED SUPR	Full	Members of the Westchester Fund who are designated to the funds by their employer as salaried supervisors.
TRAVELER	TRAVELER	—	LIUNA member working within CVLDC who is not a member of any affiliated CVLDC Local (work dues only) – Membership Type changes to Construction Worker if they transfer in.
UNION REP/EMPLOYEE	U REP/EMPL	Full	Members who are employed with LIUNA affiliated organizations (International, District Council, Local, LECET, LMCC, Training and GROC).
WRECKING	WRECKING	Full	Members who work in demolition/wrecking, assigned to a Local, and exempt from the Apprenticeship Program. Must remain working with environmental contractors for minimum 2,400 hours before switching to any non-environmental contractor.



LIUNA Chicago Standard Membership Types

MTP and CAS Types	Abbreviations	MCL	Descriptions
152 PUBLIC SECTOR	PUBLIC SEC-I 152	Full	Local 152 Lake County Forest Preserve at \$25.00 per month
225 SECURITY	SECURITY-I 225	Full	Local 225 Security Members at 1.30%
225 CLERICAL	CLERICAL-I 225	Full	Local 225 H&W Members at 2.00%
681 WORKER I	WORKER-I 681	Full	Local 681 Member at 3.00%
681 WORKER II	WORKER-II 681	Full	Local 681 Member at 2.50%
681 WORKER III	WORKER-III 681	Full	Local 681 Member at 2.25%
681 WORKER IV	WORKER-IV 681	Full	Local 681 Member at 1.75%
681 WORKER V	WORKER-V 681	Full	Local 681 Member at 1.50%
681 WORKER VI	WORKER-VI 681	Full	Local 681 Member at 1.00%
681 WORKER VII	WORKER-VII 681	Full	Local 681 Member at 0.00%
681 PUBLIC SECTOR I	PUBLIC SEC-I 681	Full	Local 681 Public Sector Member at 1.75%
1001 PUBLIC SECTOR I	PUBLIC SEC-I 1001	Full	Local 1001 Members at 3.15%
1001 PUBLIC SECTOR II	PUBLIC SEC-II 1001	Full	Local 1001 Members at 3.00%
1001 PUBLIC SECTOR III	PUBLIC SEC-III 1001	Full	Local 1001 Members at 2.50%
1001 PUBLIC SECTOR IV	PUBLIC SEC-IV 1001	Full	Local 1001 Members at 1.75%
1092 PUBLIC SECTOR I	PUBLIC SEC-I 1092	Full	Local 1092 Members at 3.15%
1092 PUBLIC SECTOR II	PUBLIC SEC-II 1092	Full	Local 1092 Members at 2.00%
1092 PUBLIC SECTOR III	PUBLIC SEC-III 1092	Full	Local 1092 Members at 1.75%
1092 PUBLIC SECTOR IV	PUBLIC SEC-IV 1092	Full	Local 1092 Members at 1.00%

CAS Types	Abbreviations	Descriptions
FAIR SHARE	FAIR SHARE	A worker who is a fair share member with private employer (may continue to work).
NON-COMPLIANT	NON-COMPLIANT	Newly hired worker with no work history prior to 2020 and is not in compliance with the mandatory apprentice program.
NOT-DEFINED	NOT-DEFINED	New worker with no work history prior to 2020 whose membership type has not yet been determined (for workers who CBA does not have mandatory apprenticeship).
JANUS	JANUS	A worker who is a "Janus" member with public sector employer (may continue to work).
TERMINATED WORKER/APPRENTICE	TERMINATED	Any worker with no work history prior to 2020 who was terminated from apprenticeship/permit worker program (cannot work).