



Communications
Workers of America

Aptify[®]

Local Membership System User Guide



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Workers of America

Overview

Welcome aboard new Aptify users! This *Aptify User Guide* is designed as a handy reference to use as you manage local membership and dues records using Aptify.

Aptify is cloud-based membership management software, which means that you access it on a web page and there is nothing to download. This software enables local, district and sector users to add, change and share electronically data relating to members of the Communications Workers of America (CWA).

Aptify was built on a flexible platform, so our system will grow with us as the needs of CWA and our locals evolve.

This *Aptify User Guide* is specific to the interface used by local, district, sector and division-level users. It walks you through the steps to access the Aptify system and perform basic CWA tasks. It includes a glossary and quick reference sheets.

If you have questions about CWA dues and membership policies, your staff representatives, district or sector leadership and the CWA Secretary-Treasurer's office are here to help. Current versions of CWA's policies and procedures can be found in the [CWA Union Operating Procedures Manual](#) (UOPM) page on the CWA website.

Now, let's get started!



Getting ready - Prerequisites

Before accessing Aptify, you will need two programs:

- An updated web browser. We recommend **Google Chrome** <https://www.google.com/chrome/> -- but you can also access Aptify using Mozilla Firefox, Microsoft Edge or Safari (Apple).
- Microsoft (MS) Excel. Excel will allow you to import, export and download personal copies of spreadsheets to your computer.

Notes:

- CWA will conduct training using Google Chrome.
- Be aware that features and images may vary across different browsers.
- Using a larger computer monitor will help you see more Aptify data on the same page, and minimize the need to use scroll bars.

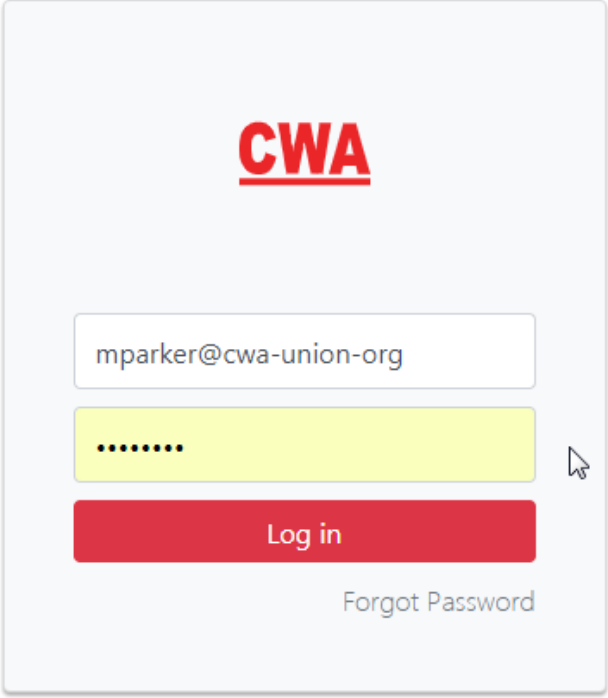


Log into Aptify

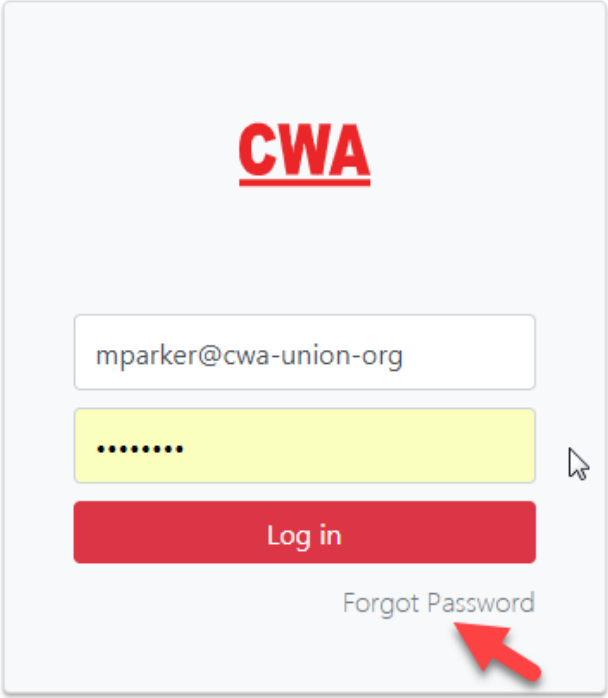
Refer to the following steps to log into Aptify.

Step	Action
1.	<p>Once you have successfully created a log-in and password, access Aptify here: https://portal-cwa.aptify.com/Home.aspx</p> <p>Notes:</p> <ul style="list-style-type: none">• You must have an email account to register for Aptify. (Locals will be responsible for setting up e-mail accounts for local users; CWA staff members should use their CWA accounts.)• To request a new log-in for a local user, a local president must e-mail aptifysupport@cwa-union.org and include the new user's name, email address, and position within the local.• To have an account deactivated, a local president can email aptifysupport@cwa-union.org. Include the name and email address of the user.• Aptify accounts are issued for individuals. Do not share your username and password with anyone.• Each user is responsible for using Aptify in accordance with the law, policies of their local and CWA policies and procedures.

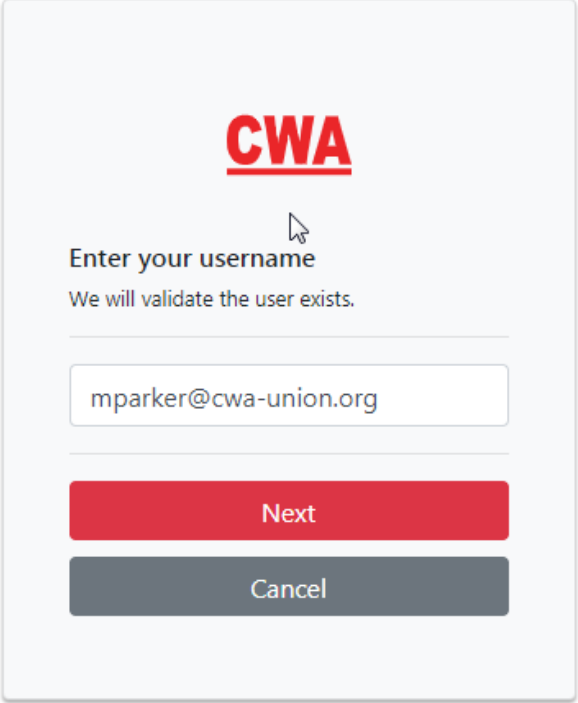


Step	Action
2.	<p>Enter your e-mail address as your username; enter your password.</p> <p><i>Figure 1: Log In</i></p> 
3.	<p>Click the Log in button.</p> <p>Note: Refer to the following steps if you forgot your password.</p> <p><i>Figure 2: Forgot Password</i></p>



Step	Action						
	<div data-bbox="610 369 1214 1062" style="text-align: center;"></div> <table border="1" data-bbox="386 1146 1430 1772"><thead><tr><th data-bbox="386 1146 773 1192">If</th><th data-bbox="773 1146 1430 1192">Then</th></tr></thead><tbody><tr><td data-bbox="386 1192 773 1276">You know your password</td><td data-bbox="773 1192 1430 1276">Proceed to the next section.</td></tr><tr><td data-bbox="386 1276 773 1772">You forgot your password</td><td data-bbox="773 1276 1430 1772"><ol style="list-style-type: none">1. Click the Forgot Password link.2. Enter your email address as your username; click the Next button.3. Receive an email to reset your password (If you need help, email aptifysupport@cwa-union.org).4. Enter your new password; enter your new password again to confirm the change.5. Click the Save button.</td></tr></tbody></table>	If	Then	You know your password	Proceed to the next section.	You forgot your password	<ol style="list-style-type: none">1. Click the Forgot Password link.2. Enter your email address as your username; click the Next button.3. Receive an email to reset your password (If you need help, email aptifysupport@cwa-union.org).4. Enter your new password; enter your new password again to confirm the change.5. Click the Save button.
If	Then						
You know your password	Proceed to the next section.						
You forgot your password	<ol style="list-style-type: none">1. Click the Forgot Password link.2. Enter your email address as your username; click the Next button.3. Receive an email to reset your password (If you need help, email aptifysupport@cwa-union.org).4. Enter your new password; enter your new password again to confirm the change.5. Click the Save button.						



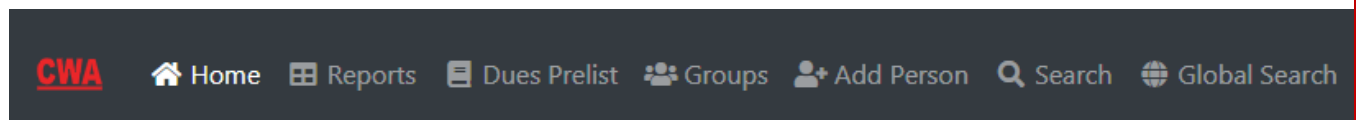
Step	Action
	<p data-bbox="786 352 1065 378"><i>Figure 3: Change Password</i></p> <div data-bbox="812 394 1386 1092"><p data-bbox="1036 506 1159 562">CWA</p><p data-bbox="878 636 1122 661">Enter your username</p><p data-bbox="878 678 1162 703">We will validate the user exists.</p><input data-bbox="878 753 1317 816" type="text" value="mparker@cwa-union.org"/><p data-bbox="1068 890 1127 915">Next</p><p data-bbox="1057 968 1135 993">Cancel</p></div>



View My Homepage (Notifications Landing Page)

Let's visit the CWA-Aptify homepage. This homepage serves as your CWA-Aptify dashboard. Notice the main menu bar at the top of the homepage (Figure 4). Each "button" on the menu bar helps you perform basic actions -- [find reports](#), [process/track dues](#), [creating groups](#), [add people](#) or [search for individuals](#).

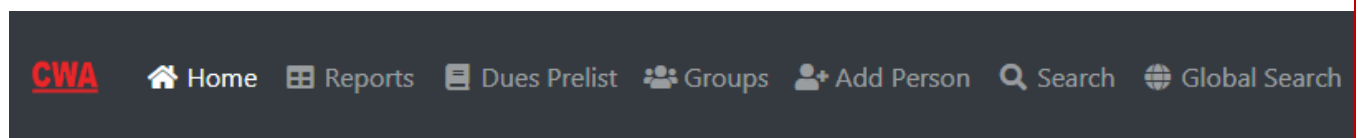
Figure 4: Main Menu Bar



Notifications will be posted in center of the homepage. This information may include general announcements, alerts about delinquencies or notification of upcoming system updates or downtime.

Now, let's review the menu buttons below the "Notifications" (Figure 5). These buttons help you to perform actions such as [exporting to Excel](#), [refreshing the page](#), [clearing sorting](#), [clearing filters](#), [clearing groupings](#), and [auto-resizing columns](#).

Figure 5: Notifications Menu Bar

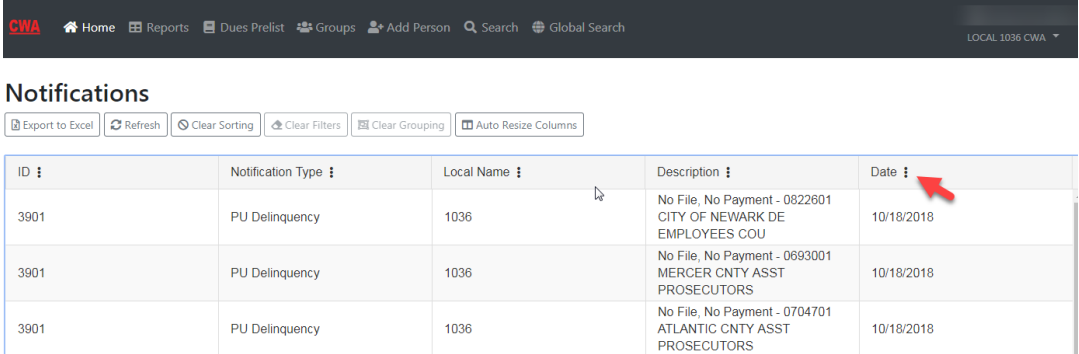


Notifications



Use the following steps to export to Excel, refresh the page, clear sorting, clear filters, clear groupings and auto-resize columns.



Step	Action
1.	<p>Click the Three Vertical Dots on the right-hand side of either column header (Figure 6).</p> <p>Note: The above action enables you to sort, group, search, create filters or resize columns. For instance, you can use this drop-down menu to sort dates from recent to oldest or vice versa, to group by dates, to create filters or to resize columns to fit better on your screen.</p> <p><i>Figure 6: Notifications</i></p>  <p><i>Figure 7: Notifications Dropdown List</i></p>



Step	Action
2.	Click an option based on your preference from the Dropdown menu.

Refer to the following table for descriptions for Notifications Menu bar buttons. For additional information about Aptify and computer buttons and terms, refer to [Appendix B – Buttons & Terms](#).

Table 1: Menu Bar Descriptions

Menu Bar Action	Description
Click “Sort Ascending”	Organizes items from oldest to newest information (e.g., from oldest to recent dates, text is organized alphabetically/numerically)
Click “Sort Descending”	Organizes items from newest to oldest information (e.g., from recent to oldest dates, text is organized alphabetically/numerically)
Click “Clear Sorting”	Removes sorted style



Menu Bar Action	Description
Click “Group By”	Organizes items by group (e.g., group by dates)
Click “Ungroup”	Removes grouped style
Click “Best Fit”	Fits information and columns best to page
Click “Columns”	Selects/deselects which columns to show on page
Click “Search”	Executes search based on criteria inputs
Click “No Filter”	Creates filters (e.g., equal to, less than, greater than, etc.)
Click “Export to Excel” button	Downloads file in an MS Excel spreadsheet format to save to your computer
Click “Clear Sorting/Filters/Grouping” buttons on Menu bar	Removes sorted/filters/grouped styles
Click “Refresh” button	Shows most recent, updated information
Click “Auto Resize Columns” button	Resizes information and columns to fit best to page

Note: Return to the [Notifications](#) section.



Search for a Person

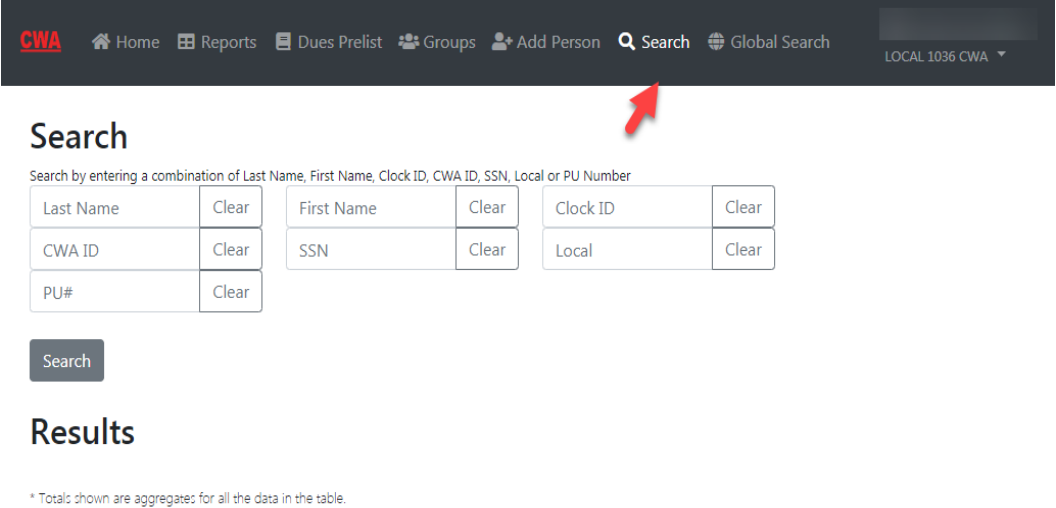
One of the most common tasks locals will perform in Aptify is retrieving the record for a specific member. So, how would you search for a person in Aptify? Let's look. There are two types of searches built into Aptify: "Search" and "Global Search."

Search: Allows you to perform a detailed search for individuals associated with your local. You can open any returned record of full details and history of a member, non-member or fee payer retrieved through this basic search.

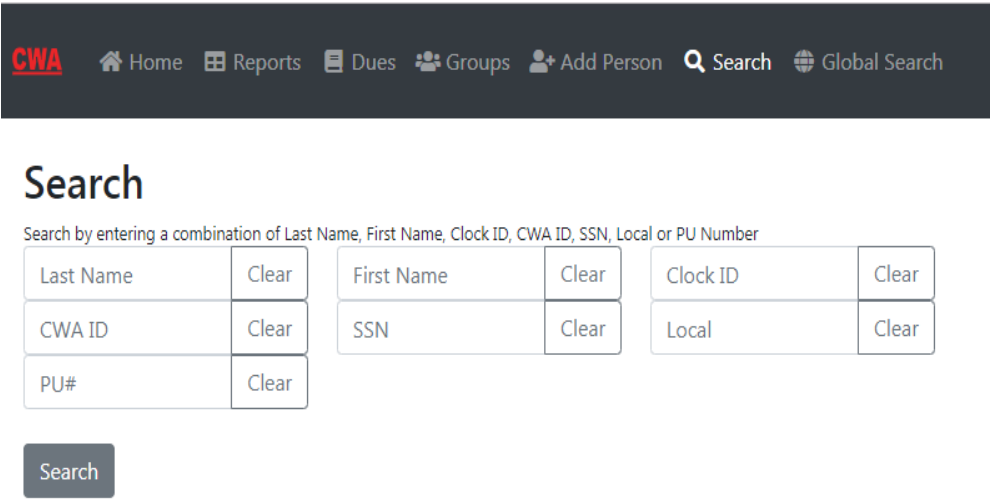
Global Search: Allows you to search the entire database across CWA for a person, but you will receive limited information and will not be able to edit the records.

Note: Return to the [Add a New Person](#), [Change Member Status](#), [Process/Track Dues](#) or [Appendix – A Quick Reference Sheets](#) sections.

Refer to the following steps when searching for a person in Aptify.

Step	Action
1.	<p>Click the Search button on the Menu bar.</p> <p><i>Figure 8: Search for Person</i></p> 



Step	Action																		
2.	<p>Enter the member’s personal information in appropriate fields (e.g., last name/SSN, etc.).</p> <p><i>Figure 9: Enter Required Member Information</i></p>  <p>Search</p> <p>Search by entering a combination of Last Name, First Name, Clock ID, CWA ID, SSN, Local or PU Number</p> <table border="1"><tr><td>Last Name</td><td>Clear</td><td>First Name</td><td>Clear</td><td>Clock ID</td><td>Clear</td></tr><tr><td>CWA ID</td><td>Clear</td><td>SSN</td><td>Clear</td><td>Local</td><td>Clear</td></tr><tr><td>PU#</td><td>Clear</td><td></td><td></td><td></td><td></td></tr></table> <p>Search</p> <p>Results</p> <p>* Totals shown are aggregates for all the data in the table.</p> <p>Note: You may enter partial information in the name fields to receive a complete profile; however numeric fields must be exact (SSN, Clock ID, Local Number, etc.)</p>	Last Name	Clear	First Name	Clear	Clock ID	Clear	CWA ID	Clear	SSN	Clear	Local	Clear	PU#	Clear				
Last Name	Clear	First Name	Clear	Clock ID	Clear														
CWA ID	Clear	SSN	Clear	Local	Clear														
PU#	Clear																		
3.	<p>Click the Search button.</p> <p><i>Figure 10: Search Results</i></p>																		



Step	Action																																																
	<p>Results</p> <p>Export to Excel Clear Sorting Clear Filters Clear Grouping Auto Resize Columns Email Get Email IDs</p> <p>Get Labels Select Report Select Record</p> <table border="1"><thead><tr><th>CWA ID</th><th>Last Name</th><th>First Name</th><th>Email</th><th>Status Type</th><th>Status</th><th>Main Status</th><th>Local Numb</th><th>PU Numb</th><th>PU Name</th><th>Clock ID</th><th>HQ City</th><th>HQ State</th><th>District</th><th>Sector</th><th>Current Empl</th></tr></thead><tbody><tr><td></td><td></td><td></td><td>alisas</td><td>Memb</td><td>Active</td><td>Active</td><td>1036</td><td>02013</td><td>NJ STATE EMPL ADMN CLER</td><td>249</td><td>Burling</td><td>NJ</td><td>District 1</td><td>Traditi</td><td>Y</td></tr><tr><td></td><td></td><td></td><td></td><td>Memb</td><td>Inactiv</td><td>Left Empl (Resig)</td><td>1036</td><td>02013</td><td>NJ STATE EMPL ADMN CLER</td><td>825</td><td>Monm Juncti</td><td>NJ</td><td>District 1</td><td>Traditi</td><td>Y</td></tr></tbody></table>	CWA ID	Last Name	First Name	Email	Status Type	Status	Main Status	Local Numb	PU Numb	PU Name	Clock ID	HQ City	HQ State	District	Sector	Current Empl				alisas	Memb	Active	Active	1036	02013	NJ STATE EMPL ADMN CLER	249	Burling	NJ	District 1	Traditi	Y					Memb	Inactiv	Left Empl (Resig)	1036	02013	NJ STATE EMPL ADMN CLER	825	Monm Juncti	NJ	District 1	Traditi	Y
CWA ID	Last Name	First Name	Email	Status Type	Status	Main Status	Local Numb	PU Numb	PU Name	Clock ID	HQ City	HQ State	District	Sector	Current Empl																																		
			alisas	Memb	Active	Active	1036	02013	NJ STATE EMPL ADMN CLER	249	Burling	NJ	District 1	Traditi	Y																																		
				Memb	Inactiv	Left Empl (Resig)	1036	02013	NJ STATE EMPL ADMN CLER	825	Monm Juncti	NJ	District 1	Traditi	Y																																		
	<p>Notes:</p> <ul style="list-style-type: none">• If you highlight a row and click “Select Record,” you will access the member’s record page where you can add/change information for that member.• If you can’t open a selected record, be sure that your browser is set to allow pop-ups, and that you are using “Search” and not “Global Search.”• If you perform a “Global Search,” you will not be able to open records or change information. You can only view results across CWA as a whole.• Clicking “Auto Resize Columns” will make this information easier to read on the screen																																																

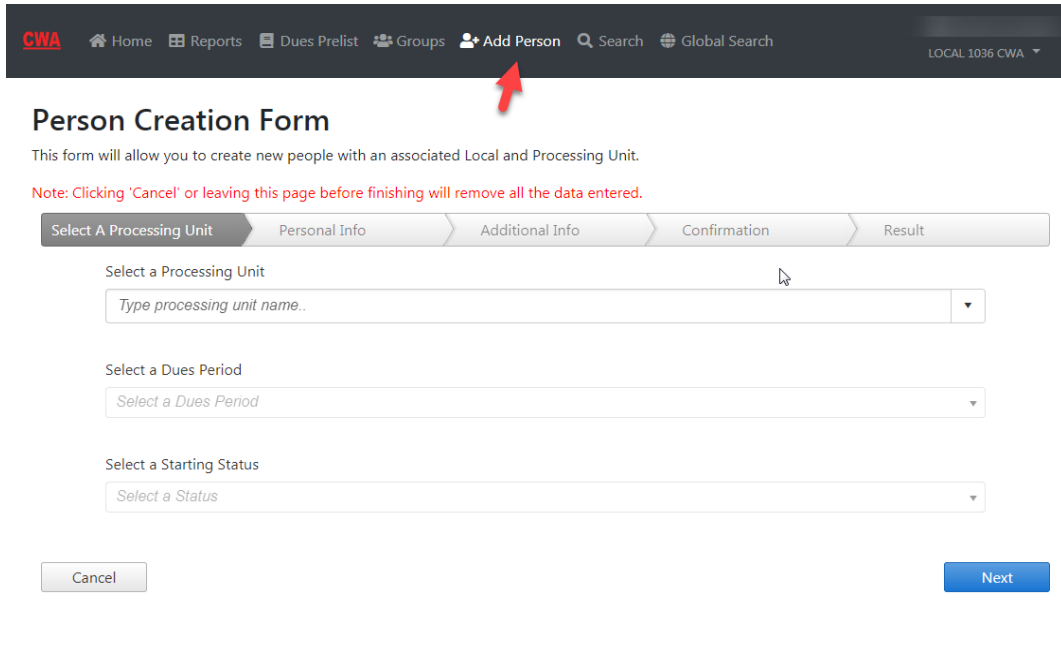


Add a New Person

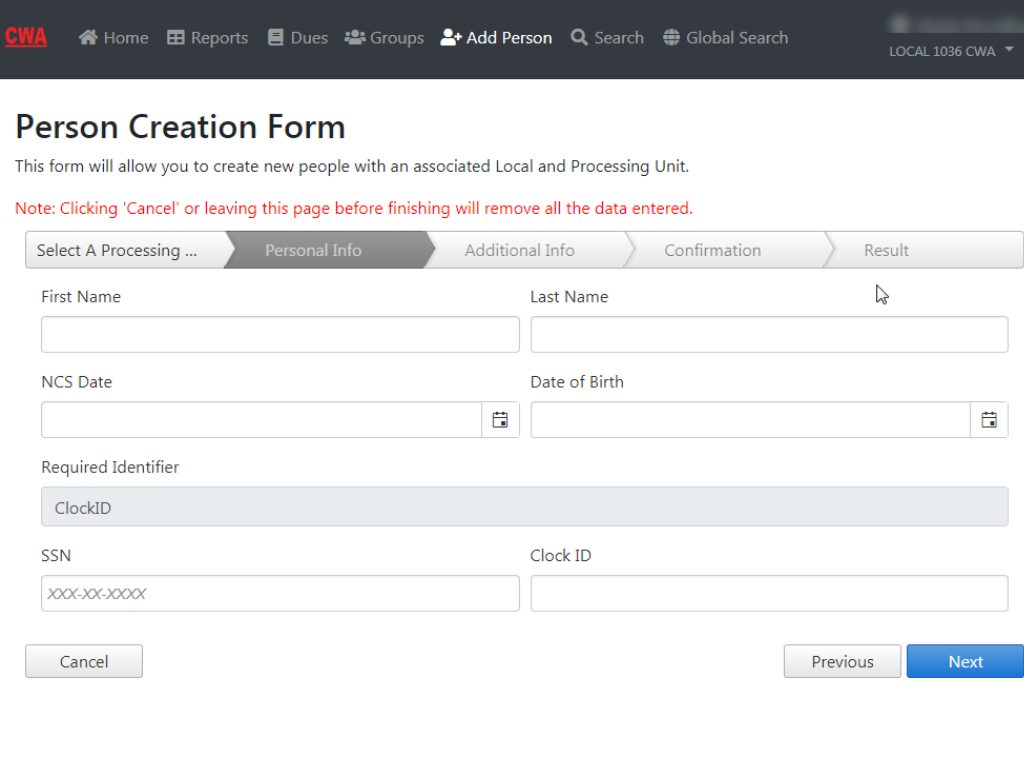

New hires who are paying dues or fees will show up in your local records as soon as they appear on an employer file processed at CWA headquarters. However, sometimes you may need to add a new person to Aptify (for instance, if a new hire has signed a card to join CWA, but is not yet showing up in employer files, or if they are hired into a unit where your local processes the dues). Refer to the following steps to add a person in Aptify.

Step	Action	
1.	Perform a Search/Global Search to determine if the person exists already in Aptify. Note: Perform a search first to avoid duplicate records in case the person might have been added already in Aptify.	
	If	Then
	The person was added in Aptify	View the person’s member information page in Aptify. If the person is in your local, you may edit the record. If the person is in another local but should be in yours, contact your dues specialist for assistance.
	The person was not added in Aptify	<ol style="list-style-type: none"> 1. Click the Add Person button on the Menu bar. 2. Select a PU, a Dues Period, and a Starting Status within those three specific Dropdown fields. 3. Click the Next button.



Step	Action
	<p data-bbox="391 407 623 436">Figure 11: Add Person</p>  <p data-bbox="391 1121 805 1150">Figure 12: Enter Additional Information</p>



Step	Action
	
2.	<p>Enter required personal information about the new person in the appropriate fields (e.g., First/Last Name, NCS Date, Required Identifier, etc.).</p> <p>Note: The required identifier is set for each bargaining unit or “PU,” depending on what information we get from that employer. Whatever the format (SSN, Clock ID, etc.) we need this unique ID number to ensure that dues information matches to the right person.</p>
3.	<p>Enter additional information (e.g., Phone Number, Email Address, etc.).</p>
4.	<p>View the “Confirmation” page; confirm all details are correct. Then hit “Next”</p> <p><small>Note: Clicking 'Next' will create the Person record. Please confirm all information is correct.</small></p> 



Step	Action
	<p>Note: Be sure to confirm all details are correct, because you cannot change the required information after the Confirmation step. If you need to correct a mistake after confirming, you will need to contact duesquestions@cwa-union.org to fix the information.</p>
5.	Perform a search to confirm you can view the new member in Aptify.



Change Member Status

Locals should regularly review and update the membership status of all the individuals associated with their local in Aptify. For instance, when an agency fee payer or a non-member signs a card, you should set their status to “pending member” in Aptify. (The status will change automatically to “member” once dues are processed.)

Note: Aptify uses a three-part member status (see the following examples):

- The first column (**status type**) indicates the member's overall, high-level status within the union: member, agency fee, or non-member.
- The second column (**status**) indicates the employment status: Active or Inactive.
- The third column (**main status**) is a descriptor of the first column; thus, it reflects several more granular adjectives to categorize better the member's current status within the union: Active, Cancelled, Deceased, Dismissed, Left Employment, Local Transfer, Pending, Retired, Xfer Management, or Dropped.
- An active member with no special circumstance will be listed as “Member – Active – Active”

Figure 13: Member Status Types

Results

Export to Excel Clear Sorting Clear Filters Clear Grouping Auto Resize Columns Email Get Email IDs Get Labels Select Record

CWA ID	Last Name	First Name	Email	Status Type	Status	Main Status	Local Number	PU Number	PU Name	Clock ID	HQ City	HQ State	District	Sector	Current Employment
225491	Smith	Mary		Agency Fee Payer	Inactive	Dropped	1036	0201301	NJ STATE EMPLOY ADMN CLERICAL	303	Mercerville	NJ	District 1	Traditional CWA	Y



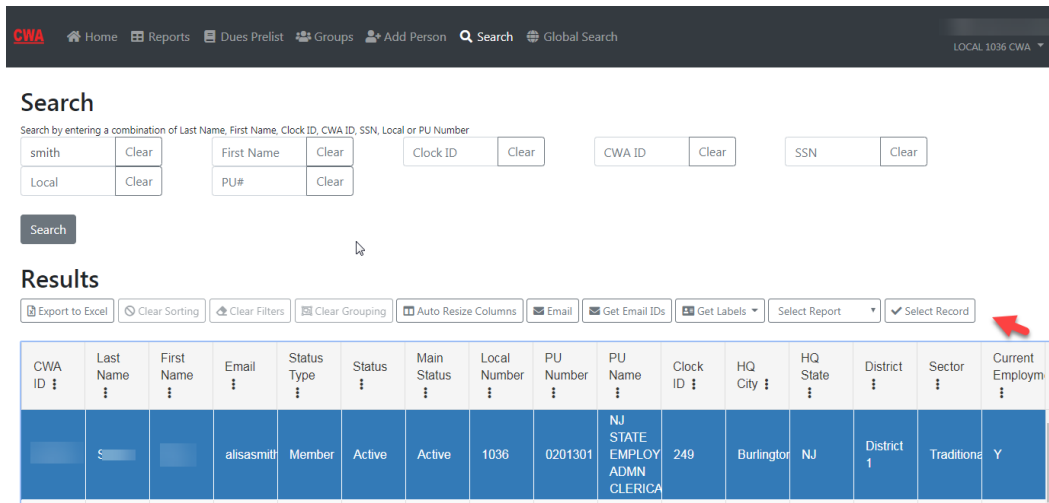
Possible Status Combinations

Status Type	Status	Main Status	Notes
Member, AFP, Non Mem	Active	Active	
Member, AFP	Inactive	Cancelled	
Member, AFP, Non Mem	Inactive	Deceased	
Member, AFP, Non Mem	Inactive	Dismissed	
Member, AFP, Non Mem	Inactive	Dropped	No longer appears on reports, unknown reason
Member, AFP, Non Mem	Active	Expelled	Lost rights as member, dues payments go into an escrow account
Member, AFP, Non Mem	Inactive	Expelled	Lost member rights, does not pay dues
Member, AFP, Non Mem	Inactive	Furlough	
Member, AFP, Non Mem	Inactive	Laid Off	
Member, AFP, Non Mem	Inactive	Left Employment	Resigned
AFP	Active	Memb to AFP	Member to AFP
Non Mem	Active	Non fr Mem	Non Member from Member
Member, AFP, Non Mem	Inactive	On Leave/Disability	
Member, AFP, Non Mem	Inactive	On Leave/Education	
Member, AFP, Non Mem	Inactive	On Leave/General	
Member, AFP, Non Mem	Inactive	On Leave/Maternity	
Member, AFP, Non Mem	Inactive	On Leave/Military	
Member, AFP, Non Mem	Inactive	On Leave/Sickness	
Member, AFP, Non Mem	Inactive	On Leave/Union Activity	
Member, AFP	Active	Pending	
AFP	Active	Rel Objector	Religious Objector
Member, AFP, Non Mem	Inactive	Retired	Non dues paying
Member, AFP	Active	Retired Cash Paying	



Member, AFP, Non Mem	Inactive	Xfer Management	Transferred to Management
Member, AFP, Non Mem	Inactive	Xfer out	Company reported, transfer to a bargaining unit not under CWA contract

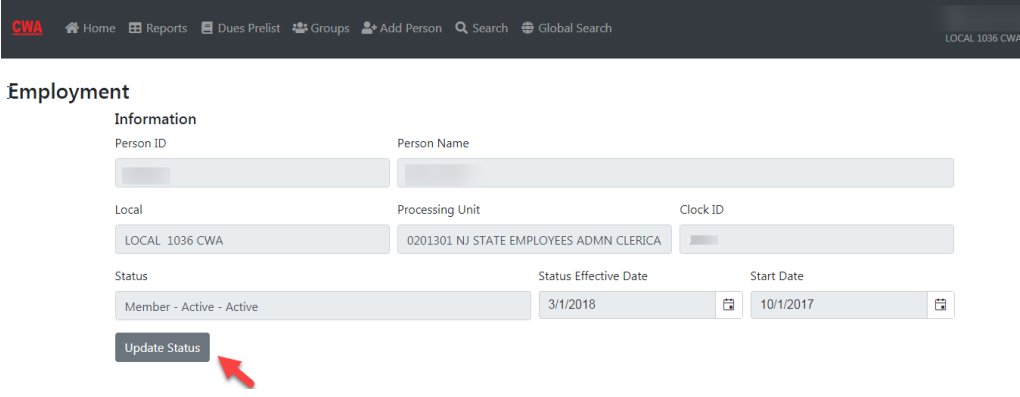
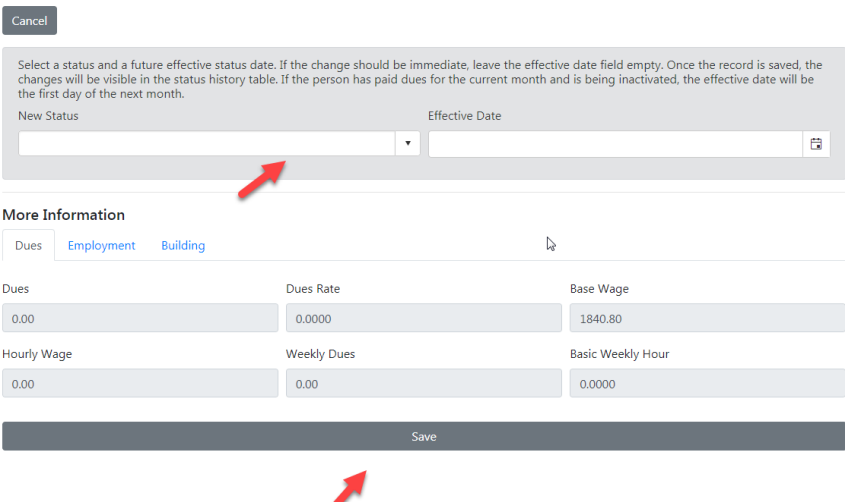
Refer to the following steps to change a member’s status in Aptify.

Step	Action
1.	Search for the person whose status you want to change.
2.	<p>Click the person’s record; click the Select Record button.</p> <p><i>Figure 14: Select Record</i></p>  <p>Note: This action takes you to the Membership Information page.</p> <p><i>Figure 15: Membership Information Page</i></p>



Step	Action
3.	Scroll to the Employment History section.
4.	Click the most recent employment history record. <i>Figure 16: Select Employment History Record</i>
5.	Click the Select Record button. Note: This action takes you to the Employment page.
6.	Click the Update Status button. <i>Figure 17: Update Member's Record</i>



Step	Action
	 <p>Note: This action will create two new sections that enable you to change member status (e.g., active to dropped, pending to active, etc.) and set an effective date.</p>
7.	Click the calendar icon (Dropdown menu) beside the Status Effective Date (date status took effect) and Start Date (date work started at the processing unit).
8.	<p>Make changes; click the Save button.</p> <p><i>Figure 18: Save Changes</i></p> 



Custom Work Location

Within the membership information, there are fields available that locals can use to change and update custom work location information. Refer to the following figure and steps. The right tab reflects the label **Custom Work Location**. This field is completely controlled by the locals and allows for a space where the locals can store any of their preferred work location information.

Figure 19: Custom Work Location

Employment History

Export to Excel Refresh Clear Sorting Clear Filters Clear Grouping Auto Resize [ms] Select Record

Start Date	Status Name	Local Number	Processing Unit Number	Processing Unit	Clock ID	ID
09/01/2012	Member - Active - Active	1000	0201301	0201301 NJ STATE EMPLOYEES ADMIN CLERICAL		
07/01/2012	Member - Inactive - Local Transfer	1999	0201301	0201301 NJ STATE EMPLOYEES ADMIN CLERICAL		

Step	Action
1.	<p>Highlight your desired record; click the Select Record tab.</p> <p><i>Figure 20: Select Record</i></p> <p>More Information</p> <p>Dues Employment Building Custom Work Location</p> <p>Dues: 0.00 Dues Rate: 0.0000 Base Wage: 1528.37</p> <p>Hourly Wage: 38.21 Weekly Dues: 0.00 Basic Weekly Hour: []</p> <p>Save</p> <p><i>Figure 21: View Custom Work Location Space</i></p>



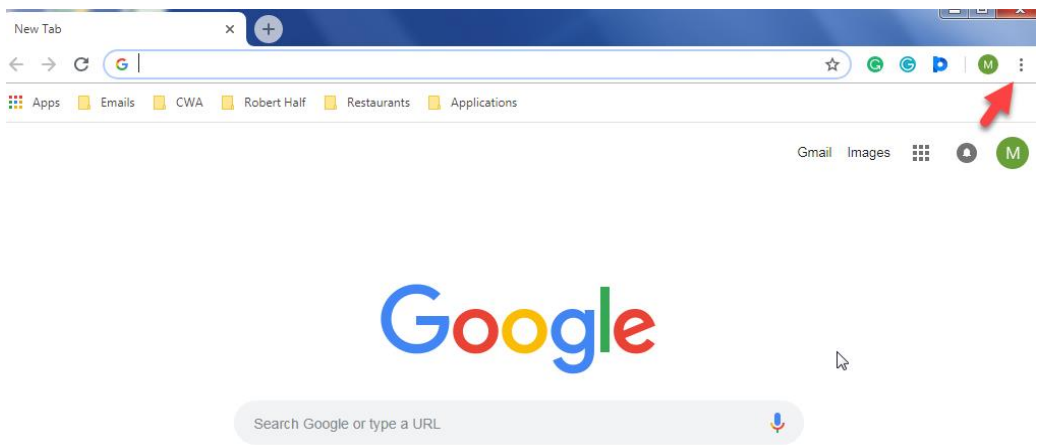
Step	Action
	<p>More Information</p> <p>Dues Employment Building Custom Work Location</p> <p>Custom Work Location 1 <input type="text"/></p> <p>Custom Work Location 2 <input type="text"/></p> <p>Custom Work Location Address <input type="text"/></p> <p>Custom Work Location City <input type="text"/></p> <p>Custom Work Location State <input type="text"/></p> <p>Custom Work Location Zip <input type="text"/></p> <p>Custom Job Title <input type="text"/></p> <p>Custom Job Description <input type="text"/></p>



Set Up Default E-mail Clients (For Gmail)

Aptify allows you to send a group email to specific individuals without leaving the system. To do this, you will need to refer to the following steps to set up default e-mail clients and access e-mails in Aptify. If you use an email client other than Gmail (outlook, yahoo, etc.), you can search the web for guidance on “set up default email client” or email aptifysupport@cwa-union.org.

Set Up Gmail As Default Client

Step	Action
1.	Open Google Chrome .
2.	Go to Settings>Advanced>Content Settings>Handlers>Switch on the Allow sites to ask to become default handlers for protocols (recommended).
	<p><i>Figure 22: Setup Default Client</i></p>  <p><i>Figure 23: Settings</i></p>



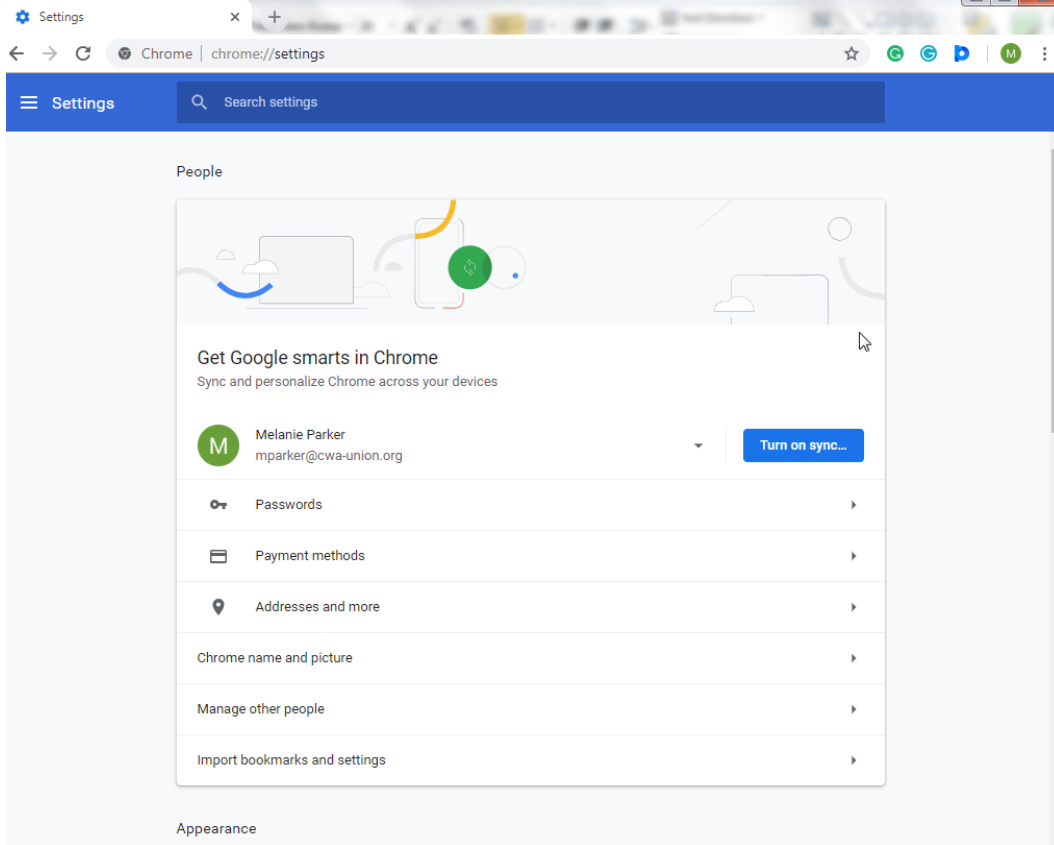
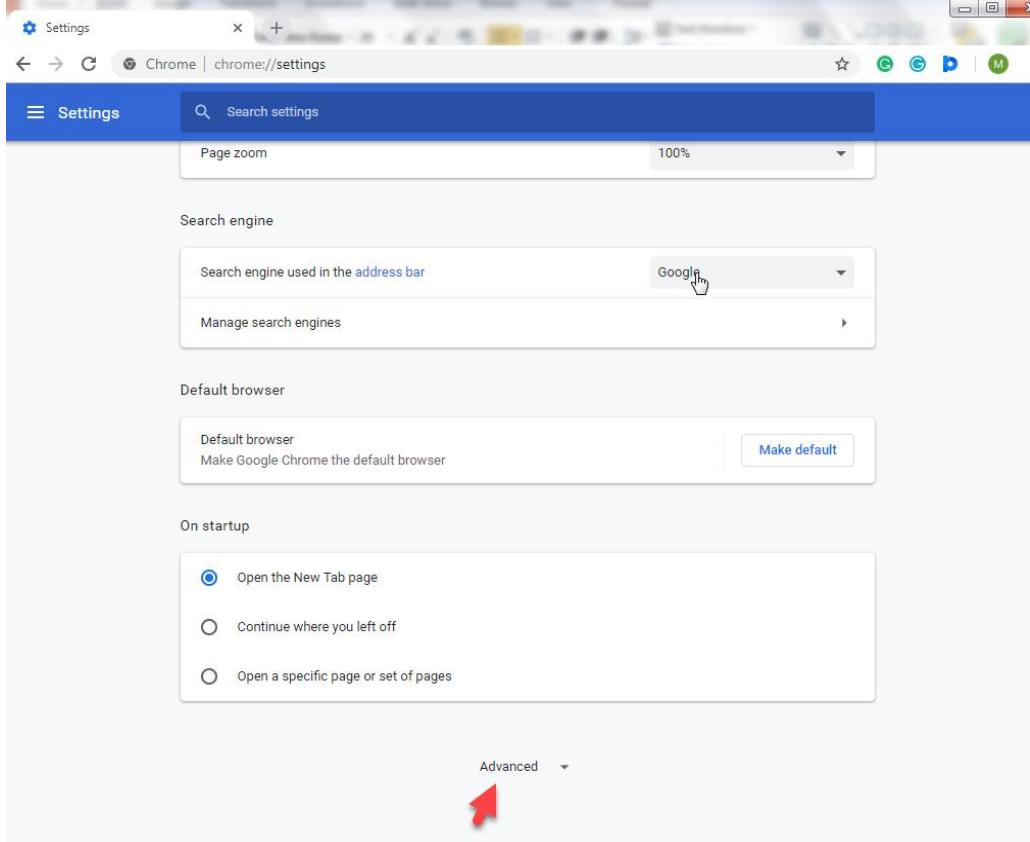
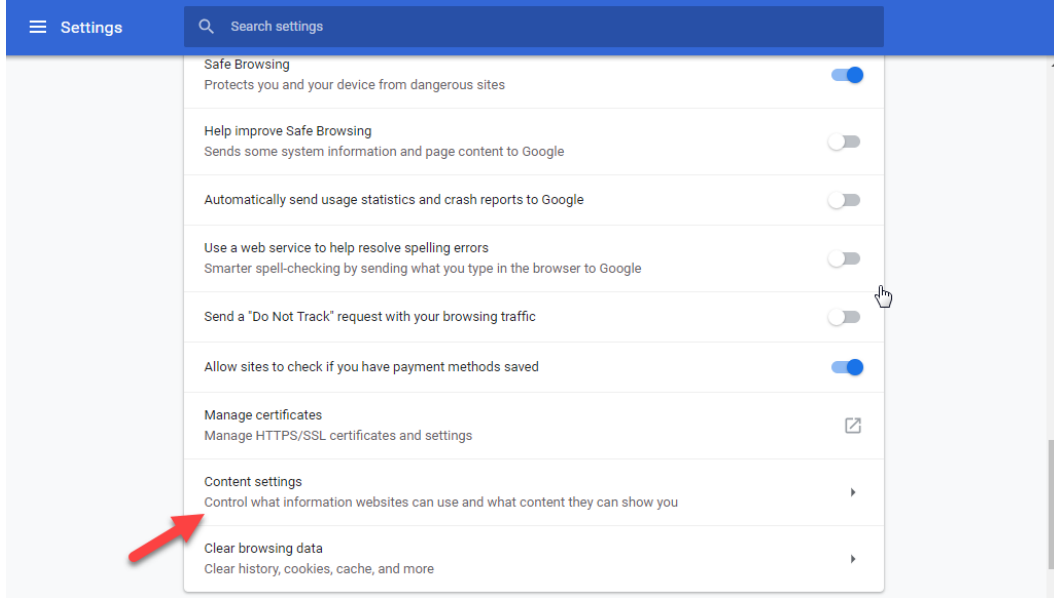
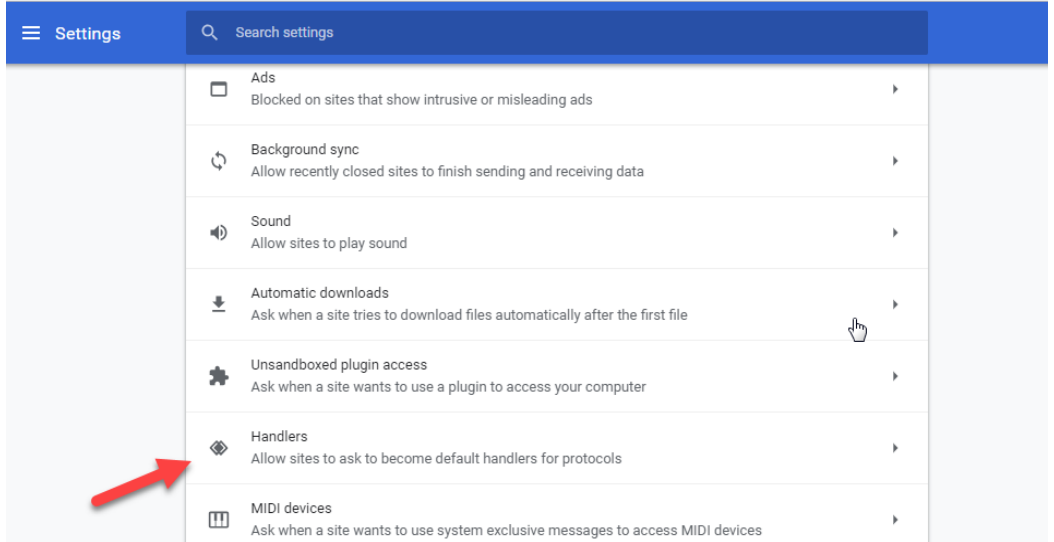
Step	Action
	 <p>The screenshot shows the Chrome Settings application. At the top, there is a search bar and a 'Settings' menu icon. Below this, the 'People' section is visible, featuring a card titled 'Get Google smarts in Chrome' with the subtitle 'Sync and personalize Chrome across your devices'. The card lists a user profile for 'Melanie Parker' with the email 'mparker@cwa-union.org' and a 'Turn on sync...' button. Below the card are several menu items: 'Passwords', 'Payment methods', 'Addresses and more', 'Chrome name and picture', 'Manage other people', and 'Import bookmarks and settings'. The 'Appearance' section is partially visible at the bottom of the screenshot.</p>

Figure 24: Advanced

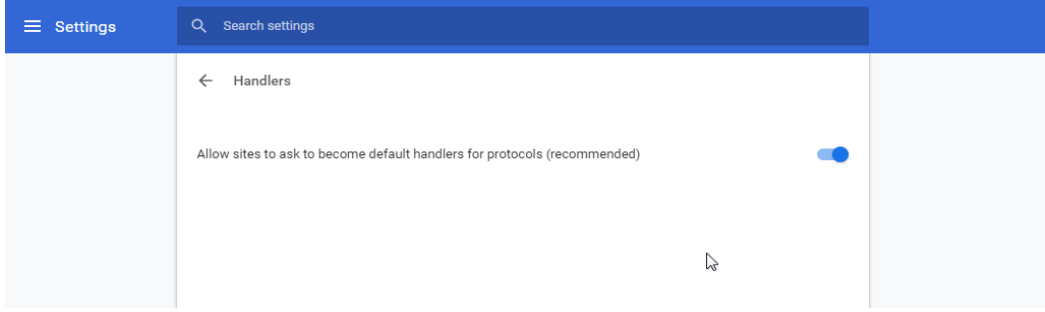
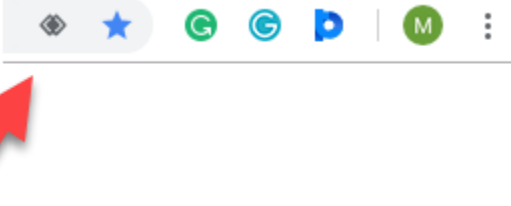


Step	Action
	 <p>The screenshot shows the Chrome Settings page. At the top, there is a search bar and a 'Page zoom' dropdown set to 100%. Below that, the 'Search engine' section shows 'Search engine used in the address bar' set to Google. The 'Default browser' section shows 'Make Google Chrome the default browser' with a 'Make default' button. The 'On startup' section has three radio button options: 'Open the New Tab page' (selected), 'Continue where you left off', and 'Open a specific page or set of pages'. At the bottom of the settings list, there is an 'Advanced' dropdown menu with a red arrow pointing to it.</p>



Step	Action
	<p data-bbox="391 352 669 380">Figure 25: Content Settings</p>  <p data-bbox="391 1066 597 1094">Figure 26: Handlers</p> 



Step	Action
	<p><i>Figure 27: Allow Sites to Ask to Become Default Handlers</i></p> 
3.	<p>Click the Eye-shaped icon (left to the Bookmark Star icon).</p> <p><i>Figure 28: Eye-shaped Icon</i></p> 
4.	Click Allow ; click the Done button.
5.	Verify under Handlers to determine if there is a new header called email .

Once your default email client is set, if you click on the **‘Email’** button (see below), a new message window will open in your Gmail account, with e-mail addresses for the selected group filled into the Bcc: section of an open email. (Bcc:, or blind copy, prevents e-mail recipients from viewing or replying to other recipients.)

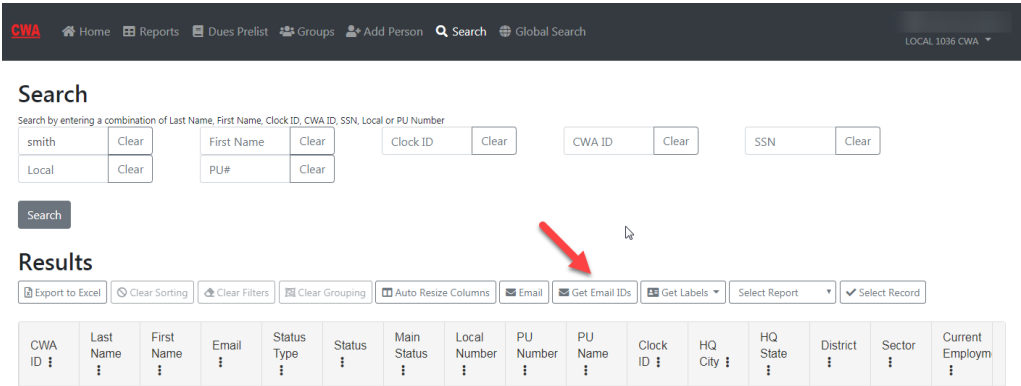
Results



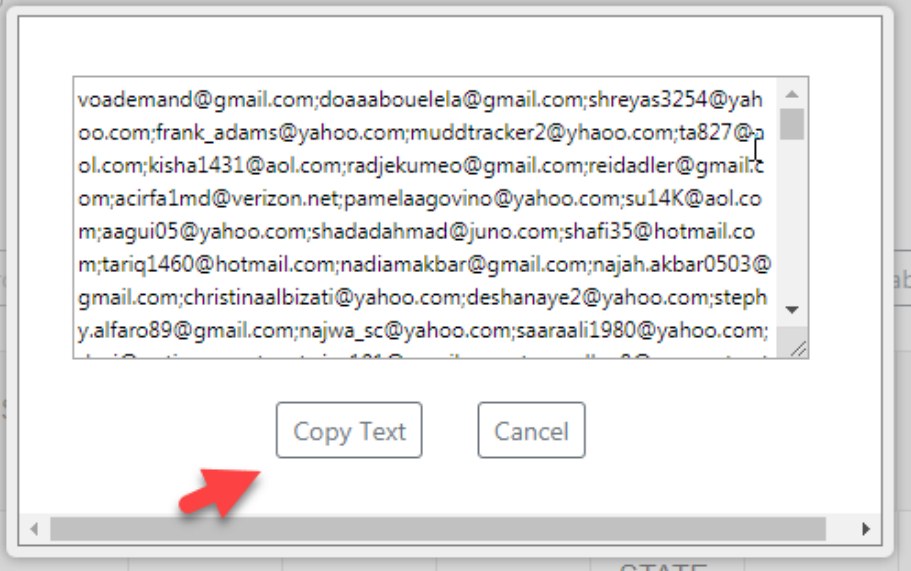


Send Group Email Without Default Mail Client

What if you need to send a group email to members (for example, to share information about an upcoming vote on a contract) but don't want to use a default e-mail client? How do you send that group email? Let's look. Refer to the following steps to send a group email in Aptify.

Step	Action
<p>1.</p>	<p>Search for an individual or group of individuals. Then click the “Get Email IDs” button.</p> <p><i>Figure 29: Get Email IDs</i></p>  <p>Note: This action enables you to select the e-mail addresses, copy, and paste them into any e-mail or a bulk e-mail service like Action Network or Salsa.</p>
<p>2.</p>	<p>Select and highlight the e-mail addresses in the box; click the “Copy Text” button.</p> <p><i>Figure 30: Select & Copy E-mail Addresses</i></p>

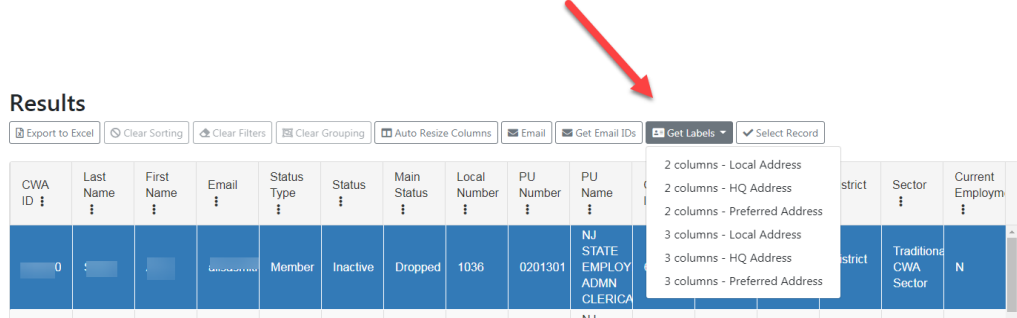


Step	Action
	
3.	Paste these email addresses into the bcc field of your email; send email. Note: Always use the bcc (blind copy) field to protect member privacy and prevented unwanted “reply all” responses.
4.	Click the “ Cancel ” button to exit out of the Get Email IDs box.



Print Address Labels

What if you need to print address labels to mail hard copies of letters or other materials to members? Let’s look. Refer to the following steps to print address labels within Aptify.

Step	Action
1.	Click the “ Search ” button on the Menu bar.
2.	Search for a member or group of members
3.	Click the “ Search ” button.
4.	Click the “ Get Labels ” button under Results. <i>Figure 31: Get Labels Button</i> 
5.	Select the column type of how you desire to print the labels.
6.	Print the Aptify-generated PDF file of all address labels. Note: The results of almost any search in Aptify can be easily converted to a mailing list using this feature. There is also an address report in the “Reports” section (Mailing/Cards) that can be used to refine and sort mailing lists. All address fields are pulled into this report and can be exported for further manipulation such as sorting by zip code or creating a mail merge. <i>Figure 32: Print Address Label</i>



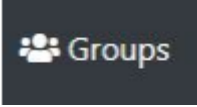

Communications
Workers of America

Step	Action
	 <p>The screenshot shows a report viewer interface. At the top left, it says 'ReportViewer.aspx'. In the center, the address '249 Fernwood Avenue, Burlington, NJ, 08016' is displayed. The page number '1 / 1' is visible at the top right. There are also icons for refresh, download, and print.</p>



Groups

The Groups section is designed to allow your local to track the membership of various committees and groups. Local Officers and Stewards groups are built into the system and cannot be deleted; they are permanent. However, you can add additional groups that your local may need. Refer to the following steps to add other groups.

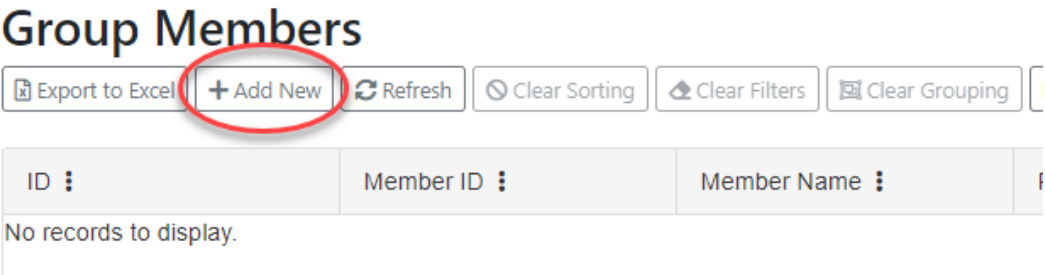
Step	Action
1.	<p>Click “Groups” at the top of the screen.</p> <p><i>Figure 33: Click Groups</i></p>  A dark grey rectangular button with a white icon of three people and the word 'Groups' in white text.
2.	<p>Click “Add New” to begin the new group creation process.</p> <p><i>Figure 34: Click Add New</i></p>  A light grey rectangular button with a white plus sign icon and the text 'Add New' in grey.
3.	<p>Enter the name of the group and add a short explanation in the “Description” box; click “Create New” at the right-hand bottom of the screen.</p> <p>Notes:</p> <ul style="list-style-type: none">• You will notice that the Name and Description fields are still editable.• If you choose, by clicking Update, those edits will take place. <p><i>Figure 35: Update</i></p>






Step	Action
	

Create Group Members

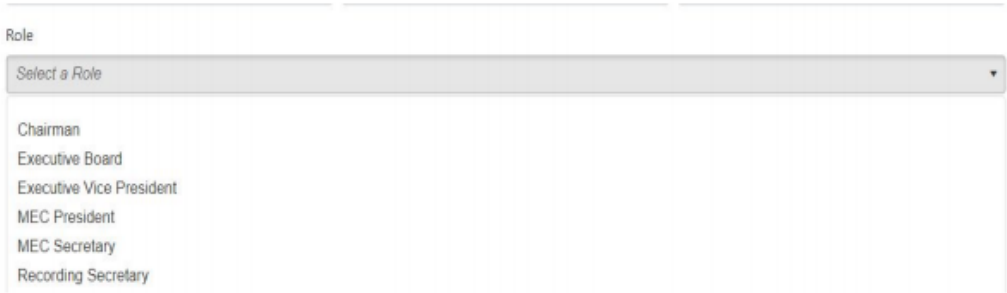
Now, let's add a new group member. Refer to the following steps.

Step	Action
1.	<p>Click “Add New” located under the heading “Group Members.”</p>  <p>Notes:</p> <ul style="list-style-type: none">• By typing in the “Member” field, you can select someone to add them to the group.• Keep in mind that only ACTIVE records are available in the list.• Notice below how with member information is auto-populated into the fields.

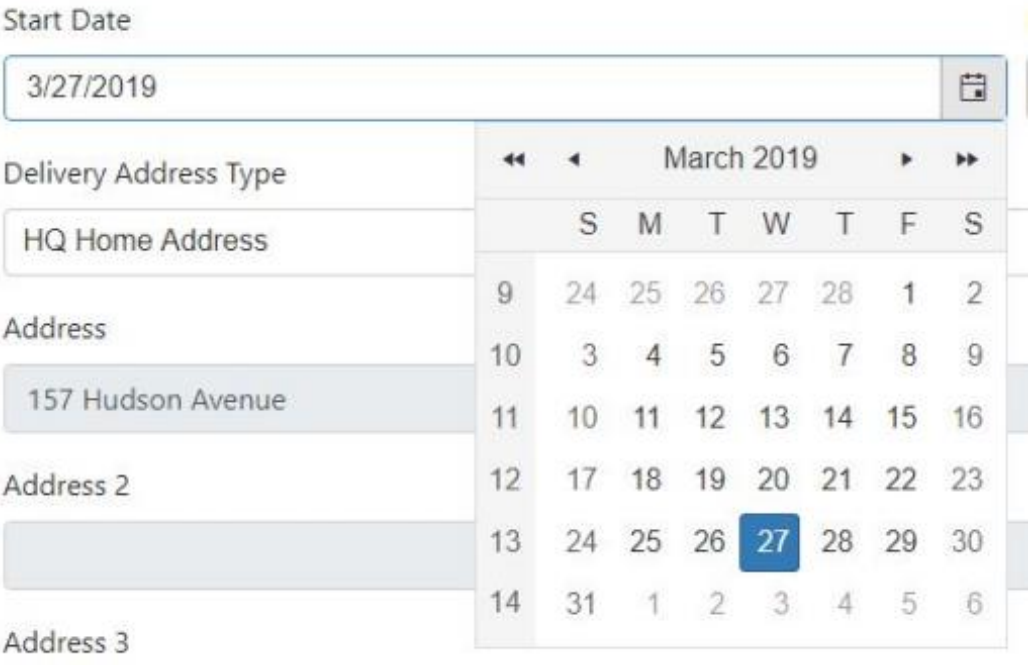


Step	Action
	<p data-bbox="381 352 747 378"><i>Figure 36: Add New Group Member</i></p> <div data-bbox="678 415 1144 556"><h2 data-bbox="678 415 1144 478">Group Members</h2><p data-bbox="678 493 1144 556">  </p></div> <p data-bbox="381 634 779 659"><i>Figure 37: Access Group Member Page</i></p> <div data-bbox="409 693 1364 1354"><h3 data-bbox="409 693 560 718">Group Member</h3><p data-bbox="409 724 1364 777">Member <input type="text" value="Type member name..."/></p><p data-bbox="409 787 1364 850">CWA ID: <input type="text" value="fadfgasdf"/> Committee Term: <input type="text" value="1036"/> Local: <input type="text" value="1036"/></p><p data-bbox="409 861 1364 913">Role: <input type="text" value="Select a Role"/></p><p data-bbox="409 934 1364 997">Start Date: <input type="text" value="3/27/2019"/> End Date: <input type="text"/></p><p data-bbox="409 1008 1364 1060">Delivery Address Type: <input type="text" value="HQ Home Address"/></p><p data-bbox="409 1081 1364 1134">Address: <input type="text"/></p><p data-bbox="409 1144 1364 1197">Address 2: <input type="text"/></p><p data-bbox="409 1207 1364 1260">Address 3: <input type="text"/></p><p data-bbox="409 1281 1364 1344">City: <input type="text"/> State/Province: <input type="text" value="Select a State"/> Zip: <input type="text"/></p></div> <div data-bbox="409 1438 1364 1711"><h3 data-bbox="409 1438 560 1463">Group Member</h3><p data-bbox="409 1470 1364 1522">Member <input type="text"/></p><ul data-bbox="409 1533 1364 1711" style="list-style-type: none">Abatemarco, John (Member - Active - Active)Abbott jr., Steven (Member - Active - Active)Abdelhamid, Amr (Agency Fee Payer - Active - Memb to AFP)Abdul, Nwakaego (Member - Active - Active)Abdur-raheem, Warith (Member - Active - Active)Abedein, Ali (Member - Active - Active)Abele, Nicholas (Member - Active - Active)</div>


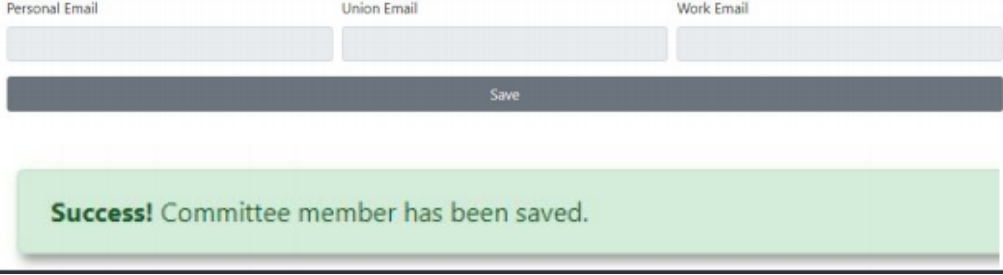


Step	Action
2.	<p>Select a role via the “Role” field (dropdown menu) located in the third row.</p>  <p>The screenshot shows a web form with a label 'Role' above a dropdown menu. The dropdown menu is currently set to 'Select a Role' and is open, showing a list of roles: Chairman, Executive Board, Executive Vice President, MEC President, MEC Secretary, and Recording Secretary.</p>
3.	<p>Select a “Start Date” and “End Date.”</p> <p>Notes:</p> <ul style="list-style-type: none">• Notice that the “Start Date” defaults to today’s date.• However, you may change the “Start Date” by clicking the “Calendar” icon and selecting a different date. <p><i>Figure 38: Select Dates</i></p>



Step	Action
	 <p>Start Date</p> <p>3/27/2019</p> <p>Delivery Address Type</p> <p>HQ Home Address</p> <p>Address</p> <p>157 Hudson Avenue</p> <p>Address 2</p> <p>Address 3</p>
4.	You can add a future “ End Date ” just as you added or changed the “ Start Date ,” however, the “ End Date ” is NOT required.
5.	Select their delivery address. An member’s mailing address can be set to a home address (HQ or Local) or the address of the local office. Choose which address you would like to use from the dropdown and the information will auto populate. This is the address that will display on the groups page and be used when pulling mailing information from the Active Local Officers report. It can be a home address or the address of the local office. <i>Figure 39: Enter Delivery Address</i>



Step	Action
	 <p>Delivery Address Type</p> <p>HQ Home Address</p> <p>HQ Home Address</p> <p>Local Home Address</p> <p>Local Office Address</p> <p>Other</p> <p>Address 3</p>
6.	<p>Select Other; this action allows you to enter manually the address; scroll to the bottom of the page; click the Save button.</p> <p><i>Figure 40: Click Save Button</i></p>  <p>Personal Email Union Email Work Email</p> <p>Save</p> <p>Success! Committee member has been saved.</p> <p>Note: You should see a green notification at the top of the page.</p> <p><i>Figure 41: Select Other</i></p>



Step	Action
	<p>Delivery Address Type <input type="text" value="Other"/></p> <p>Address <input type="text"/></p> <p>Address 2 <input type="text"/></p> <p>Address 3 <input type="text"/></p> <p>City <input type="text"/> State/Province <input type="text"/> Zip <input type="text"/></p> <p>Country <input type="text" value="United States"/> <input type="checkbox"/> Bad Address</p>
7.	<p>Return to the group list page by clicking “Groups” at the very top of the page. See Figure 33.</p> <p>Note: You should see the group you created. If you do not see the group, filter the necessary columns; so, your group will appear.</p>
8.	<p>Click the record you choose to edit group members; click the “Select Record” button.</p> <p>Notes:</p> <ul style="list-style-type: none">• You can now edit the group.• Click the group; click the “Select Record” button.• Select “Local Officer Group.” <p><i>Figure 42: Select Entered Group</i></p>



Step	Action																		
	<p>Groups</p> <p>Export to Excel Add New Refresh Clear Sorting Clear Filters Clear Grouping Auto Resize Columns Select Record</p> <table border="1"><thead><tr><th>ID</th><th>Name</th><th>Committee Type</th><th>Local</th><th>Local Name</th><th>Date Founded</th></tr></thead><tbody><tr><td>33</td><td>Local Officers - Local 1036</td><td>Local Officers</td><td>3920</td><td>1036</td><td>03/10/2010</td></tr><tr><td>2491</td><td>Group 1</td><td>Other</td><td>3920</td><td>1036</td><td>03/27/2019</td></tr></tbody></table>	ID	Name	Committee Type	Local	Local Name	Date Founded	33	Local Officers - Local 1036	Local Officers	3920	1036	03/10/2010	2491	Group 1	Other	3920	1036	03/27/2019
ID	Name	Committee Type	Local	Local Name	Date Founded														
33	Local Officers - Local 1036	Local Officers	3920	1036	03/10/2010														
2491	Group 1	Other	3920	1036	03/27/2019														
9.	<p>Select a Local Officers group.</p> <p><i>Figure 43: Select Local Officer Group</i></p> <p>Notes:</p> <ul style="list-style-type: none">• Notice when you add a new member, the dropdown menu for Roles contains different options.• Some officer roles are unique, and will require you to enter an “End Date” before creating another member with the same																		



Step	Action
	<p>role. These roles include:</p> <ul style="list-style-type: none">○ President○ President – ACTING○ LEC President – ACTING○ LEC Secretary○ Secretary – Treasurer○ Secretary – Treasurer – Acting○ Trustee○ Temporary Admin <ul style="list-style-type: none">● If you attempt to create a new member without entering an “End Date” for the current role, you will receive an error message. <p><i>Figure 44: Error Message</i></p> <div data-bbox="399 1142 1409 1255" style="border: 1px solid #ccc; background-color: #f0f0f0; padding: 5px;"><p>Error! There is a member that has this unique role for the selected committee term . Please invalidate or change the "End Date" of that Member. X</p></div> <ul style="list-style-type: none">● The groups pages will show the history of all members of that group with end dates. Refer to the Active Local Officers report on the “Reports” page to see only current officers.

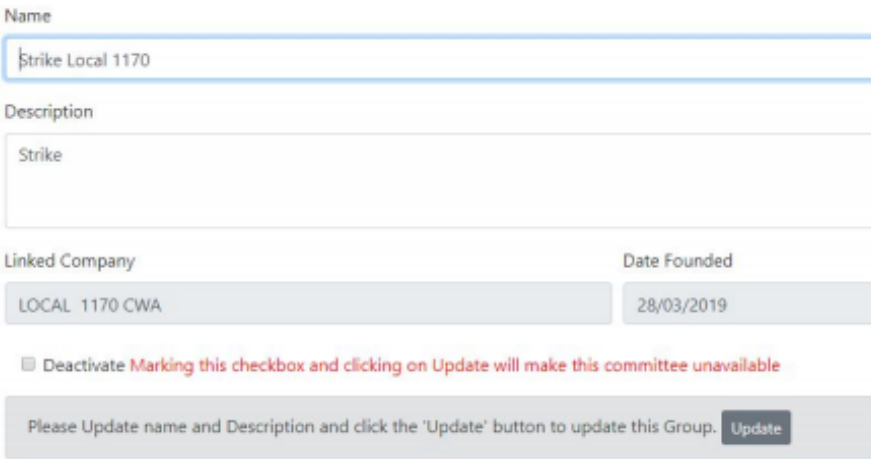
Stewards Group

Like the Local Officers group, the Stewards group also is a permanent feature of the Groups Section, since training, tracking and communicating with stewards is a constant necessity for locals.



Deactivate Groups

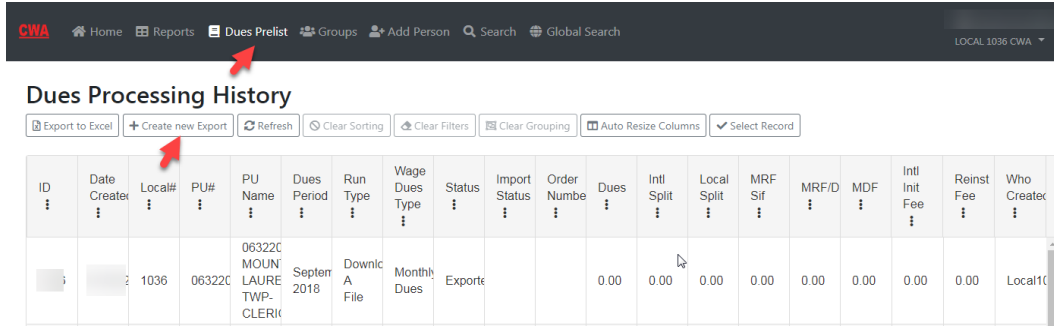
There are times when you need to discontinue the use of a specific group. For this example, we will deactivate a “Strike Local 1170” group.

Step	Action
1.	Select the group you wish to deactivate. Refer to Figure 42 .
2.	<p>Click the checkbox next to “Deactivate” then “Update.”</p> <p><i>Figure 45: Deactivate Group</i></p>  <p>Notes:</p> <ul style="list-style-type: none"> • Keep in mind, once you click and update the “Deactivate” feature, you will no longer have that group available. • Even if a group is deactivated, the name of that group cannot be reused. • This screen should take you back to the “Groups” page and you will notice that the group is no longer on the list.



Create a Prelist to Pay Per Caps to CWA

Many employers send dues checks directly to CWA headquarters, where we process the information and send locals their share. But some locals receive checks directly from an employer, or hand-collect dues or fees from members or fee payers. To process these “bottom-up” dues, you will need to create a “Prelist,” using the following steps:

Step	Action
1.	<p>Click the Dues Prelist button on the Menu bar.</p> <p><i>Figure 46: Click Dues Prelist Button</i></p> 
2.	<p>Click the “Create New Export” button under the “Dues Processing History” menu bar.</p>
3.	<p>Select the appropriate information in the “Processing Unit,” “Dues Period” and “Dues Type” dropdown fields.</p> <p><i>Figure 47: Select Dues Processing Dropdown Menu</i></p>



Step	Action						
<p>4.</p>	<p>Click “Create”.</p> <p>Note: If another user opened dues process on a particular PU for a particular month, you will not be able to complete a dues process for the same month. You also cannot start processing dues for a new dues period until an invoice has been created at HQ for the previous month.</p> <p><i>Figure 48: Opened Dues Process Report Error Message</i></p> <table border="1" data-bbox="396 1417 1430 1757"> <thead> <tr> <th data-bbox="396 1417 919 1476">If</th> <th data-bbox="919 1417 1430 1476">Then</th> </tr> </thead> <tbody> <tr> <td data-bbox="396 1476 919 1581">No one opened a dues process report</td> <td data-bbox="919 1476 1430 1581">Proceed to the next step.</td> </tr> <tr> <td data-bbox="396 1581 919 1757">Another user opened a dues process report</td> <td data-bbox="919 1581 1430 1757"> <ol style="list-style-type: none"> 1. Return to the Dues Prelist page; search for the opened file. 2. Click the Abandon button </td> </tr> </tbody> </table>	If	Then	No one opened a dues process report	Proceed to the next step.	Another user opened a dues process report	<ol style="list-style-type: none"> 1. Return to the Dues Prelist page; search for the opened file. 2. Click the Abandon button
If	Then						
No one opened a dues process report	Proceed to the next step.						
Another user opened a dues process report	<ol style="list-style-type: none"> 1. Return to the Dues Prelist page; search for the opened file. 2. Click the Abandon button 						



Step	Action
	<p>to abandon the file if necessary.</p> <p>3. Proceed to the next steps to edit and upload the file.</p>

Figure 49: Abandon Record

The screenshot shows the 'Dues Processing' interface. At the top, there is a navigation bar with 'CWA', 'Home', 'Reports', 'Dues Prelist', 'Groups', 'Add Person', 'Search', and 'Global Search'. Below this is the 'Dues Processing' section with a sub-header and a description: 'This page will allow you to get a pre-list file or work within the system to get the dues calculated.' A note below states: 'Based on the status of your export, you will be able to upload the modified dues file and process it, abandon the import (in order to be able to export another file for the same Processing Unit or submit the file for CWA's review and final approval.)' The main content area is titled 'Bottom Up information' and contains a table of details: ID, Status (Exported), Processing Unit (0632001 BEVERLY SEWERAGE AUTHORITY), Dues Period (August 2018), File Type (Monthly Dues), and Run Type (Download A File). To the right of this table are several buttons: 'Download File from HQ' (green), 'Abandon' (red), and 'Select' (grey). Below these is a text box that says 'Drag file here to upload to HQ'. A red arrow points to the 'Abandon' button.

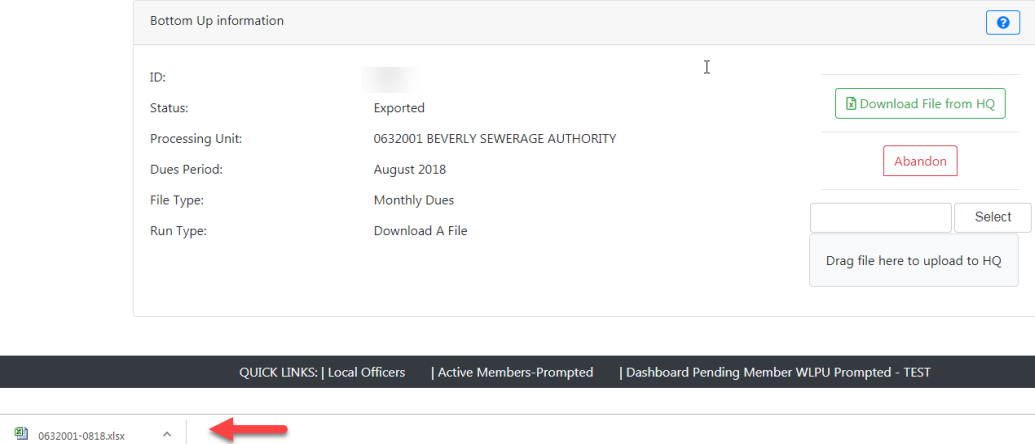
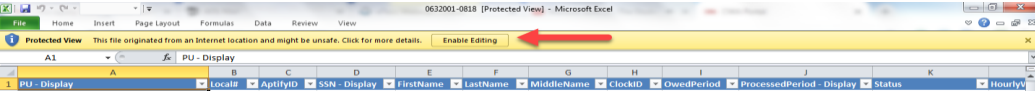
5. Click the **Create** button.

6. Click the **green Download File from HQ** button.

Figure 50: Download File from HQ

This screenshot is similar to Figure 49, showing the 'Dues Processing' page. The 'Bottom Up information' table shows: ID, Status (Exported), Processing Unit (0669301 SCHOOL CROSSING GUARDS - WILLINGBORO TOWNSHIP OF), Dues Period (August 2018), File Type (Monthly Dues), and Run Type (Download A File). The buttons on the right are 'Download File from HQ' (green), 'Abandon' (red), and 'Select' (grey). Below them is the 'Drag file here to upload to HQ' text box. A red arrow points to the green 'Download File from HQ' button.



Step	Action
	<p>Note: The file downloads to the left-hand bottom corner of your screen.</p> <p><i>Figure 51: Access Downloaded File</i></p> <p>Dues Processing</p> <p>This page will allow you to get a pre-list file or work within the system to get the dues calculated.</p> <p>Based on the status of your export, you will be able to upload the modified dues file and process it, abandon the import (in order to be able to export another file for the same Processing Unit or submit the file for CWA's review and final approval.</p> 
7.	<p>Double-click the downloaded file; click the Enable Editing button at the top center of the file.</p> <p><i>Figure 52: Enable Editing</i></p> 
8.	<p>Edit the file as necessary.</p> <p>Note: Aptify will not allow you to edit columns.</p>
9.	<p>Click the File>Save As>Save to your desired location>click the Save button. You can save the file with any name that will be easy for you to find.</p> <p><i>Figure 53: Click Save As Button</i></p>



Step	Action
	<p>Information about 0632001-0818 C:\Users\mparker\Downloads\0632001-0818.xlsx</p> <p>Permissions Anyone can open, copy, and change any part of this workbook.</p> <p>Prepare for Sharing Before sharing this file, be aware that it contains: ■ Content that people with disabilities are unable to read</p> <p>Versions There are no previous versions of this file.</p>

10. Click the **Select** button in Aptify; upload your newly saved, edited file to Aptify.

Figure 54: Select File

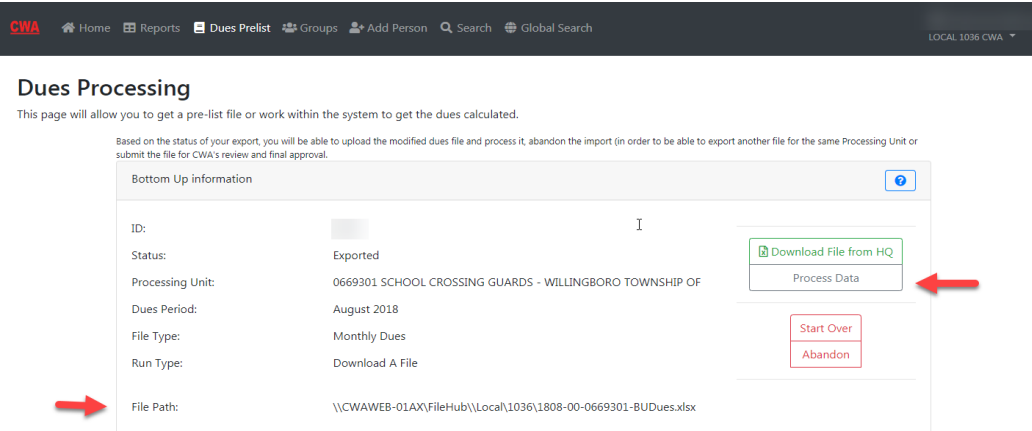
Dues Processing
This page will allow you to get a pre-list file or work within the system to get the dues calculated.

Based on the status of your export, you will be able to upload the modified dues file and process it, abandon the import (in order to be able to export another file for the same Processing Unit or submit the file for CWA's review and final approval).

Bottom Up information	
ID:	
Status:	Exported
Processing Unit:	0632001 BEVERLY SEWERAGE AUTHORITY
Dues Period:	August 2018
File Type:	Monthly Dues
Run Type:	Download A File

Download File from HQ
Abandon
Select

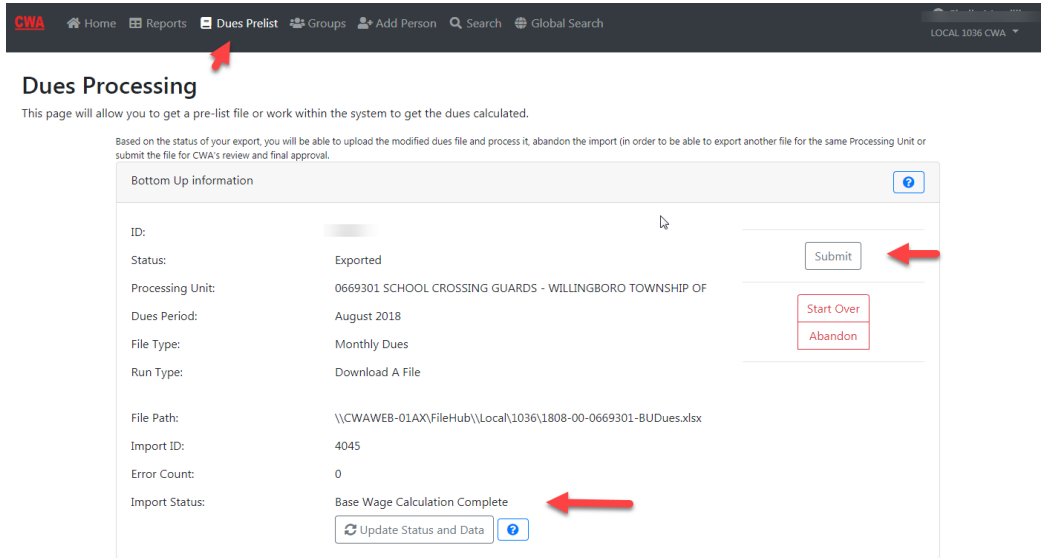


Step	Action
	<p>Note: You will see beside File Path: the file location.</p> <p><i>Figure 55: File Location</i></p> 
11.	Click the “Process Data” button.
12.	View the Due Processing page with the newly edited data from the file you saved.
13.	Click the “Update Status and Data” button. <i>Figure 56: Update Status and Data</i>



Step	Action
	<p>Based on the status of your export, you will be able to upload the modified dues file and process it, abandon the import (in order to be able to export another file for the same Processing Unit or submit the file for CWA's review and final approval.</p> <div data-bbox="472 394 1422 863"> <p>Bottom Up information ?</p> <p>ID: [redacted]</p> <p>Status: Exported Submit</p> <p>Processing Unit: [redacted]</p> <p>Dues Period: August 2018 Start Over</p> <p>File Type: Monthly Dues Abandon</p> <p>Run Type: Download A File</p> <p>File Path: \\CWAWEB-01AX\FileHub\Local\1036\1808-00-0822601-BUDues.xlsx</p> <p>Import ID: 4013</p> <p>Error Count: 0</p> <p>Import Status: Base Wage Calculation Complete Update Status and Data ?</p> </div> <p>Note: If you see the “Base Wage Calculation Complete” message beside “Import Status,” the imported file is ready to be submitted for approval.</p> <p><i>Figure 57: Base Wage Calculation Complete</i></p> <div data-bbox="394 1142 1427 1696"> <p>CWA Home Reports Dues Prelist Groups Add Person Search Global Search LOCAL 1036 CWA</p> <h3>Dues Processing</h3> <p>This page will allow you to get a pre-list file or work within the system to get the dues calculated.</p> <p>Based on the status of your export, you will be able to upload the modified dues file and process it, abandon the import (in order to be able to export another file for the same Processing Unit or submit the file for CWA's review and final approval.</p> <div data-bbox="505 1304 1325 1696"> <p>Bottom Up information ?</p> <p>ID: [redacted]</p> <p>Status: Exported Submit</p> <p>Processing Unit: 0669301 SCHOOL CROSSING GUARDS - WILLINGBORO TOWNSHIP OF</p> <p>Dues Period: August 2018 Start Over</p> <p>File Type: Monthly Dues Abandon</p> <p>Run Type: Download A File</p> <p>File Path: \\CWAWEB-01AX\FileHub\Local\1036\1808-00-0669301-BUDues.xlsx</p> <p>Import ID: 4045</p> <p>Error Count: 0</p> <p>Import Status: Base Wage Calculation Complete Update Status and Data ?</p> </div> </div>
14.	Click the “Dues Prelist” button on the Menu bar to verify the status



Step	Action
	<p>of the PU that you just submitted for approval.</p> <p><i>Figure 58: Submit File and Select Dues Prelist Button</i></p>  <p><i>Figure 59: Validation Upload</i></p>

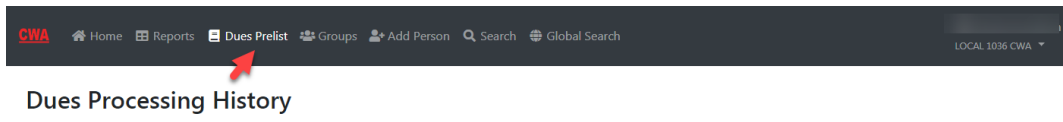
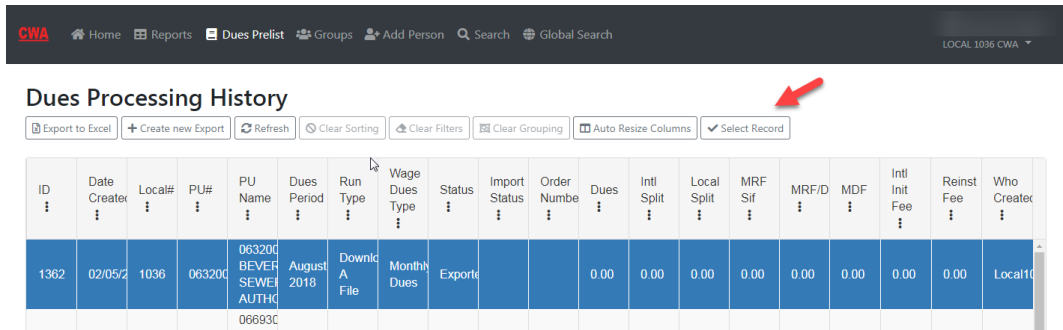


Step	Action																				
	<div data-bbox="396 352 1422 407"><p>CWA Home Reports Dues Prelist Groups Add Person Search Global Search LOCAL 1036 CWA</p></div> <h3 data-bbox="406 424 584 453">Dues Processing</h3> <p data-bbox="406 457 915 478">This page will allow you to get a pre-list file or work within the system to get the dues calculated.</p> <p data-bbox="500 487 1315 516">Based on the status of your export, you will be able to upload the modified dues file and process it, abandon the import (in order to be able to export another file for the same Processing Unit or submit the file for CWA's review and final approval).</p> <div data-bbox="503 520 1321 907"><p data-bbox="516 525 643 541">Bottom Up information ?</p><table border="1"><tr><td data-bbox="516 575 539 592">ID:</td><td data-bbox="711 575 750 592">[Redacted]</td></tr><tr><td data-bbox="516 604 555 621">Status:</td><td data-bbox="721 604 769 621">Exported</td></tr><tr><td data-bbox="516 634 604 651">Processing Unit:</td><td data-bbox="721 634 1094 651">0669301 SCHOOL CROSSING GUARDS - WILLINGBORO TOWNSHIP OF</td></tr><tr><td data-bbox="516 663 587 680">Dues Period:</td><td data-bbox="721 663 792 680">August 2018</td></tr><tr><td data-bbox="516 693 571 709">File Type:</td><td data-bbox="721 693 799 709">Monthly Dues</td></tr><tr><td data-bbox="516 722 571 739">Run Type:</td><td data-bbox="721 722 808 739">Download A File</td></tr><tr><td data-bbox="516 764 571 781">File Path:</td><td data-bbox="721 764 1091 781">\\CWAWEB-01AX\FileHub\Local\1036\1808-00-0669301-BUDues.xlsx</td></tr><tr><td data-bbox="516 793 571 810">Import ID:</td><td data-bbox="721 793 750 810">4045</td></tr><tr><td data-bbox="516 823 571 840">Error Count:</td><td data-bbox="721 823 734 840">0</td></tr><tr><td data-bbox="516 852 587 869">Import Status:</td><td data-bbox="721 852 812 869">Validation Ready</td></tr></table><p data-bbox="727 873 880 890"><input type="button" value="Update Status and Data"/> ?</p><p data-bbox="1188 621 1253 638">Start Over</p><p data-bbox="1188 651 1253 667">Abandon</p></div> <p data-bbox="393 982 1412 1024">Note: If you see it, it has been submitted to HQ and is under review.</p>	ID:	[Redacted]	Status:	Exported	Processing Unit:	0669301 SCHOOL CROSSING GUARDS - WILLINGBORO TOWNSHIP OF	Dues Period:	August 2018	File Type:	Monthly Dues	Run Type:	Download A File	File Path:	\\CWAWEB-01AX\FileHub\Local\1036\1808-00-0669301-BUDues.xlsx	Import ID:	4045	Error Count:	0	Import Status:	Validation Ready
ID:	[Redacted]																				
Status:	Exported																				
Processing Unit:	0669301 SCHOOL CROSSING GUARDS - WILLINGBORO TOWNSHIP OF																				
Dues Period:	August 2018																				
File Type:	Monthly Dues																				
Run Type:	Download A File																				
File Path:	\\CWAWEB-01AX\FileHub\Local\1036\1808-00-0669301-BUDues.xlsx																				
Import ID:	4045																				
Error Count:	0																				
Import Status:	Validation Ready																				



Check Dues Prelist Status

To check on the status of a dues prelist report, refer to the following steps.

Step	Action																																								
1.	<p>Click the Dues Prelist button on the Menu bar.</p> <p><i>Figure 60: Click Dues Prelist Button</i></p>  <p>Dues Processing History</p>																																								
2.	<p>Click the record to highlight it.</p> <p><i>Figure 61: Select to Check Dues Report</i></p>  <p>Dues Processing History</p> <p>Export to Excel + Create new Export Refresh Clear Sorting Clear Filters Clear Grouping Auto Resize Columns Select Record</p> <table border="1"> <thead> <tr> <th>ID</th> <th>Date Created</th> <th>Local#</th> <th>PU#</th> <th>PU Name</th> <th>Dues Period</th> <th>Run Type</th> <th>Wage Dues Type</th> <th>Status</th> <th>Import Status</th> <th>Order Number</th> <th>Dues</th> <th>Intl Split</th> <th>Local Split</th> <th>MRF Sif</th> <th>MRF/D</th> <th>MDF</th> <th>Intl Init Fee</th> <th>Reinst Fee</th> <th>Who Created</th> </tr> </thead> <tbody> <tr> <td>1362</td> <td>02/05/2</td> <td>1036</td> <td>063200</td> <td>063200 BEVER SEWER AUTHORITY 06693C</td> <td>August 2018</td> <td>Download A File</td> <td>Month Dues</td> <td>Exporte</td> <td></td> <td></td> <td>0.00</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> <td>Local10</td> </tr> </tbody> </table>	ID	Date Created	Local#	PU#	PU Name	Dues Period	Run Type	Wage Dues Type	Status	Import Status	Order Number	Dues	Intl Split	Local Split	MRF Sif	MRF/D	MDF	Intl Init Fee	Reinst Fee	Who Created	1362	02/05/2	1036	063200	063200 BEVER SEWER AUTHORITY 06693C	August 2018	Download A File	Month Dues	Exporte			0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	Local10
ID	Date Created	Local#	PU#	PU Name	Dues Period	Run Type	Wage Dues Type	Status	Import Status	Order Number	Dues	Intl Split	Local Split	MRF Sif	MRF/D	MDF	Intl Init Fee	Reinst Fee	Who Created																						
1362	02/05/2	1036	063200	063200 BEVER SEWER AUTHORITY 06693C	August 2018	Download A File	Month Dues	Exporte			0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	Local10																						
3.	<p>Click the “Select Record” button under the Dues Processing History Menu bar.</p>																																								
4.	<p>View the report and check the information.</p>																																								



View Reports

You can view information in Aptify by using searches and filters from the main homepage. But you can also find commonly used information by clicking the **“Reports”** button on the Menu bar. CWA is continually testing and adding dues and membership reports and we welcome your suggestions. Current reports include Dues Summary, Settled Transactions, Active Local Officers, Seniority, Work Location, Mailing, and others. To view a sample of our existing reports, refer to the following figure.

Figure 62: View Reports

The screenshot shows the CWA Aptify interface. The top navigation bar includes 'CWA', 'Home', 'Reports', 'Dues Prelist', 'Groups', 'Add Person', 'Search', and 'Global Search'. The 'Reports' menu item is highlighted with a red arrow. Below the navigation bar, the 'Reports' section is titled 'Dues Reports'. A list of report categories is displayed, including 'Pending Bottom Up Wizard Runs', 'Previous Bottom Up Witch Runs', 'Dashboard Summary Reports', 'Invoices', 'Local Dues Summary By PU', 'Settled Transactions by PU', 'Unsettled Transactions by PU', 'Invoices (Closed)', 'Settled Transactions by Export Date', and 'WLPUR Records'. The 'Local Dues Summary By PU' category is expanded to show 'Available Reports: Per Cap Multi-Local Report' and 'Posted Multi-Local Dues Report'.



Appendix A – Quick Reference Sheets

Search for a Person

Refer to the following steps on searching for a person.

Step	Action
1.	Click the Search button on the Menu bar.
2.	Enter the member’s personal information in appropriate fields (e.g., last name/SSN, etc.).
3.	Click the Search button.

Add a New Person

Refer to the following steps on adding a new person.

Step	Action						
1.	Perform a Search/Global Search to determine if the person was added already in Aptify. <table border="1" data-bbox="391 1163 1443 1675"> <thead> <tr> <th>If</th> <th>Then</th> </tr> </thead> <tbody> <tr> <td>The person was added in Aptify</td> <td>View the person’s member information page in Aptify.</td> </tr> <tr> <td>The person was not added in Aptify</td> <td> 1. Click the Add Person button on the Menu bar. 2. Select a PU, a Dues Period, and a Starting Status within those three specific Dropdown fields. 3. Click the Next button. </td> </tr> </tbody> </table>	If	Then	The person was added in Aptify	View the person’s member information page in Aptify.	The person was not added in Aptify	1. Click the Add Person button on the Menu bar. 2. Select a PU , a Dues Period , and a Starting Status within those three specific Dropdown fields. 3. Click the Next button.
If	Then						
The person was added in Aptify	View the person’s member information page in Aptify.						
The person was not added in Aptify	1. Click the Add Person button on the Menu bar. 2. Select a PU , a Dues Period , and a Starting Status within those three specific Dropdown fields. 3. Click the Next button.						
2.	Enter required personal information about the new person in the						



Step	Action
	appropriate fields (e.g., First/Last Name, NCS Date, Required Identifier, etc.).
3.	Enter additional information (e.g., Phone Number, Email Address, etc.).
4.	View the Confirmation page; confirm all details are correct.
5.	Perform a search to confirm you can view the new member in Aptify.



Change Member Status

Refer to the following steps on changing a member's status.

1. From a member's page, scroll to the Employment History section.

2. Click the most recent employment history record.

Figure 63: Select Employment History Record

Employment History

Export to Excel Refresh Clear Sorting Clear Filters Clear Grouping Auto Resize Columns Select Record

Start Date ↓	Status Name ↓	Local Number ↓	Processing Unit Number ↓	Processing Unit ↓	Clock ID ↓	ID ↓
01/01/2011	Member - Active - Active	1036	0201301	0201301 NJ STATE EMPLOYEES ADMN CLERICAL		

3. Click the **Select Record** button.

Note: This action takes you to the Employment page.

Click the **Update Status** button.

Figure 64: Update Member's Record

CWA Home Reports Dues Prelist Groups Add Person Search Global Search LOCAL 1036 CWA

Employment

Information

Person ID Person Name

Local Processing Unit Clock ID

LOCAL 1036 CWA 0201301 NJ STATE EMPLOYEES ADMN CLERICAL

Status Status Effective Date Start Date

Member - Active - Active 3/1/2018 10/1/2017

Update Status

Note: This action will create two new sections that enable you to change member status (e.g., active to dropped, pending to active, etc.) and set an effective date.



Process/Track Dues Using Prelist

Refer to the following steps on processing/tracking dues using a prelist.

Step	Action	
1.	Click the Dues Prelist button on the Menu bar.	
2.	Click the Create new Export button under the Due Processing History Menu bar.	
3.	Select the appropriate information in the Processing Unit, Dues Period, and Dues Type Dropdown fields.	
4.	Click Create.	
	If	Then
	No one opened a dues process report	Proceed to the next step.
Another user opened a dues process report	<ol style="list-style-type: none"> 1. Return to the Dues Prelist page; search for the opened file. 2. Click the Abandon button to abandon the file if necessary. 3. Proceed to the next steps to edit and upload the file. 	
5.	Click the Create button.	
6.	Click the green Download File from HQ button.	
7.	Double-click the downloaded file; click the Enable Editing button at the top center of the file.	



Step	Action
8.	Edit the file as necessary.
9.	Click the File>Save As> Save to your desired location>click the Save button.
10.	Click the Select button in Aptify; upload your newly saved, edited file to Aptify.
11.	Click the Process Data button.
12.	View the Due Processing page with the newly edited data from the file you saved.
13.	Click the Update Status and Data button.
14.	Click the Dues Prelist button on the Menu bar to verify the status of the PU, which you just submitted for approval.

Check Dues Prelist Status

Refer to the following steps on checking a dues report using a prelist.

Step	Action
1.	Click the Dues Prelist button on the Menu bar.
2.	Click the record to highlight it.
3.	Click the Select Record button under the Due Processing History Menu bar.
4.	View the report and check the information.



Send Group Email

Refer to the following steps on sending a group email.

Step	Action
1.	Click the Get Email IDs button.
2.	Select and highlight the email addresses in the box; click the Copy Text button.
3.	Paste these email addresses into your email; send email.
4.	Click the Cancel button to exit out of the Get Email IDs box.



Print Labels

Refer to the following steps on printing labels.

Step	Action
1.	Click the Search button on the Menu bar.
2.	Enter the member's personal information in appropriate fields (e.g., last name/SSN, etc.).
3.	Click the Search button.
4.	Click the Get Labels button under Results.
5.	Select the column type of how you desire to print the labels.
6.	Print the Aptify-generated PDF file of all address labels.



Appendix B – Buttons & Terms

Refer to the following table for buttons, terms, and examples.

Note: Return to the [Menu Bar Descriptions](#) table.

Button/Term	Example
Button	<ul style="list-style-type: none">• Log In button• Search button• Add New Person button• Next button• Done button• Email button• Dues Prelist button• Create new Export button• Radio button• Create button• Download File from HQ button• Enabling Editing button• Save button• Select button• Process Data button• Update Status and Data button• Select Record button• Reports button• Clear Sorting button



Button/Term	Example
	<ul style="list-style-type: none">• Export to Excel button• Clear Filters button• Clear Grouping button• Auto-resize columns button
Dashboard	<ul style="list-style-type: none">• Snapshot of your action buttons you see on your homepage
Download	<ul style="list-style-type: none">• Make a copy to save to your computer
Email	<ul style="list-style-type: none">• Send electronic letters to others
Field	<ul style="list-style-type: none">• Dropdown field
File	<ul style="list-style-type: none">• Document you save to your computer
Homepage	<ul style="list-style-type: none">• First page you reach after you access Aptify
Icon	<ul style="list-style-type: none">• Eye-shaped icon
Menu Bar	<ul style="list-style-type: none">• Due Processing Menu bar• Due Processing History Menu bar• Results Menu bar
Notifications	<ul style="list-style-type: none">• Delinquencies, announcements, updates, downtime
Record	<ul style="list-style-type: none">• Member's record
Screen	<ul style="list-style-type: none">• Computer monitor
Upload	<ul style="list-style-type: none">• Upload file



Appendix C – Glossary

Refer to the following table for acronyms and definitions.

Acronym	Definition
CWA	Communications Workers of America
MS	Microsoft
PU	Processing Unit – a workgroup whose dues are processed together in a batch