HOW TO ADD A NEW MEMBER TO THE ROSTER

1. Go to **Connect**, then select **Roster.**

2. In the Roster page, click the **+ADD** blue action button to the right. This will open the **Add to Your Roster** page.

3. Make sure that all required information is filled out correctly. The required information will have a red asterisk by the field.

Add to Your Roster

Demographics

*A check for duplicate records will be made as you provide data below. Thank you for your patience while this is completed.

Prefix
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*First Name *

*Last Name *

Date of Birth

☐ Female ☐ Male

<p align="center" style="color:red">*** Required Information ***</p>

- First Name
- Last Name
- Membership
  - Organization
  - Pathway
- Type
  - Fee Payer (Member that does not want to join the union, but required to pay a reduced rate)
  - Member (Member of the Union)
  - Non-Member (Not a member of the Union, set this way for members wanting communications only)
  - Retired Member (Members that are retired)
- Status
  - Active (Paying member of the Union)
  - Inactive – "option"
- Initiation Date
- Billing Process
  - Template Rates (Default setting for all Active and Active Retired Members and set up during the Collect feature training)
  - Do Not Bill (Should be used if your Local is not using SMART to collect dues. Should also be used when a member should not be billed)
 - Inactive (Not applicable)
  - Bill on Payment (Not applicable)

<p style="color:red">*** NOTE – By default, the <u>Collect feature is turned off</u> and you will set the Billing Process to Template Rates. <u>However</u>, if you Add a new member and the Collect feature is turned on, the member will begin being billed if the Billing Process is set to Template Rates. *** Please reach out to SMART support if you have any questions ***</p>

4. Click the **+ADD** blue action button in the lower right of the page.
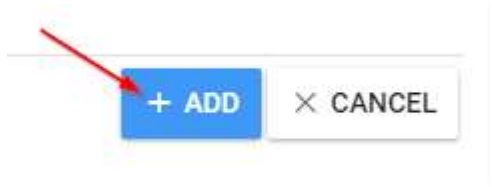
5. If the members Type is set to Member and Status is set to Active, the member will immediately receive a **Member Number**. You can verify by opening the members profile, go to the **Membership** page and look for the **Member Number**.
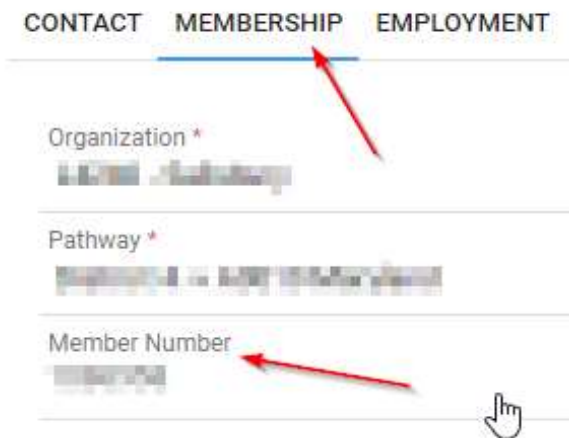
Note: the SMART platform and the IAFF International's system communicate with each other. When you enter the **New Member** information in SMART, it is automatically submitted to the IAFF. Their system will assign a **New Member Number** and will send that back to the SMART system.

6. If adding a Non-Members such as volunteers or office staff, make sure to mark Non-Member and Do Not Bill. This will ensure the IAFF membership department will not issue a Member ID Number.

Type *
Non-Member

Status *
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Initiation Date

Billing Process *
Do Not Bill