Step by Step LM report filing

- 1. Go to the "Department of Labor"
- 2. Click on "Electronic Filing System" (EFS)
- 3. Register for a "User Account and Password"
- 4. KEEP TRACK OF THIS INFORMATION IN A SAFE PLACE—YOU WILL NEED IT THROUGHOUT THE PROCESS.
- 5. Obtain a "Union Pin" (ONLY ONE PERSON DOES THIS, TYPICALLY THE SECRETARY/TREASURER)
- 6. KEEP THIS PIN NUMBER WITH YOUR LM FILES.
- 7. Sign in using the information you just got.
- 8. Select "Start a New Form"
- 9. Fiscal year selected is "2024"
- 10. Form selected is "LM4"
- 11. Period covered: Begin date: 7/1/2023
 - End date: 6/30/2024
- 12. "Get form"
- 13. Much of the information on Page 1 will be pre-filled for you. YOU DO HAVE TO VERIFY THIS INFORMATION! Also, Make sure box 4 shows "Letter Carriers, Rural, Ind"; box 5 shows "Local Union"; and box 7 shows "your county unit name". **In the past, there has been an issue with the website preventing us from placing our "local unit number" in box 6**
- 14. Press the "Save" button at top of the page.
- 15. Select "Page 2" in menu on left of screen
- 16. Answer questions on left side of page from your worksheet. (Paper copy is prefilled for you)
 - a. **Answer "YES" to Question 9 ONLY if you signed a new constitution for your local unit at your Spring meeting. You will be prompted to provide additional information about this. Simply type "Updated constitution" in this section.
 - b. Question 10 should be NO.
 - c. Question 11 should be NO. **If it is Yes, please contact WIRLCA Secretary/Treasurer IMMEDIATELY!
 - d. Question 12 should be NO. (Unless I have told you otherwise, then the amount is 2500)
 - e. Question 13 answer can be obtained from the report that was included with your labels for your spring meeting.
- Question 14 value is obtained from adding your assets value (typically savings and checking balances from your June 30, 2024 bank statement). **USE ONLY WHOLE DOLLAR AMOUNTS. Round up for over \$XX.50 and round down for under \$XX.50
- 18. Question 15 is the total of all debts of the unit (typically should be 0)
- 19. Question 16 is the total of all dues received and interest received. Remember to include interest from ALL sources.
- 20. Question 17 is all disbursements made by the local unit during the filing period. This includes payments for stamps, supplies, convention delegate pay, any meals at meetings, etc.

- 21. Question 18 is amount paid to local unit officers (if any). If you pay your local secretary/treasurer for the position, this annual amount is shown here.
- 22. CHECK YOUR MATH (use the worksheet and the tip included in this mailing).
- 23. Press the "Save" button at top of the page
- 24. Select "Page 1" in menu on left of screen
- 25. If you answered "Yes" to Question 9:
 - a. Select "Add Attachments" at top of page
 - b. Follow prompts to add file (preferably a PDF of the signed document):
 - i. Select type of attachment: "Constitution"
 - ii. Select the file by clicking in the name field and selecting the file to upload
 - iii. Press the "Attach File" button. Name of file will appear in list shown on page once it has been uploaded. It is a good idea to select the file and select "Open" to verify you have uploaded the correct file. Whatever file you upload should include actual signatures of those officers who have signed it.
- 26. Press the "Save" button at top of the page.
- 27. Press the "Validate" button at top of the page. This will review your entries and let you know if anything is missing or isn't right. If all is ok, a message telling you to proceed to sign return will appear. If not, you will receive instructions on what to review.
- 28. Once you have "Validated" the report, the boxes at the bottom of the page where signatures go will show in Red. Click on the appropriate box and a pop-up screen will appear where you will verify your information and enter your password.
- 29. Report will be saved so that the other officer may then log in from their location to sign.
- 30. IF YOU CHANGE ANYTHING AFTER THE FIRST SIGNATURE HAS BEEN RECORDED, IT WILL VOID THAT SIGNATURE AND EACH PERSON WILL HAVE TO SIGN AGAIN.
- 31. Once both officers have signed you will receive a pop-up window telling you to "print" a copy. The system is set up so that when you select "Print", it will automatically save a copy as a PDF. This is your opportunity to change the filename and choose where you would like to save the file in your computer to find later. This is also a good time to save a copy of the bank statement. File name for the PDF of the completed LM report should be in the following format:
 2024.001.LM.done (001 should be replaced with your local unit number)
- 32. Press the "Submit" button at the top of the page once both officers have digitally signed the report. At the pop-up screen, you will need to select "submit" a second time.
- 33. Print a copy of the confirmation screen showing the Department of Labor has received your submitted report. **The "Snip" tool is great for this and can be found by searching programs in your start menu.
- 34. Print a hard copy of the completed LM report with all the attachments for your files. Email copies of the PDF files to the WIRLCA Secretary/Treasurer to confirm you have submitted the report.