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Job Title Settings

Setting up job title Election Day payments

In the job title settings tab, you need to review/edit the payment for the job titles for each election.

For each job title –define the pay information by clicking 'edit' across from the job title. Then:

- a. Pay Type: choose how you want this job title to be paid for their election day work:
 - i. Lump sum = an exact amount the worker will receive for working Election Day for their job title assignment.
 - ii. Per unit = the amount the worker should receive for each hour they work for their job title assignment.
- b. Payment: define the dollar amount
 - i. For lump sum – you define the total dollar amount.
 - ii. For per unit – you define the amount that should be paid per hour.
- c. Remember to click 'Save'.

Defining Extra Expenses

Expense Settings – this is where you can define the extra amount of money a worker may get for miles driven or using their cell phone, etc.

1. Job title settings tab → click Expense Settings

Home	Expense Settings	Work Hours Setting	Job Title Budget
Communication			
Election Officers			
Assigned			
Training			
Election Day Attendance			
Payroll			
Complaints			
Reports			
Job Title Settings			
Members			

Election Job Title (5)

☐ Sort	Job Title	Type	Ta
☐ 0	Assistant Chief-AC	Per Precinct	1
☐ 0	Chief-C	Per Precinct	1
☐ 0	Officer-O	Per Precinct	6
☐ 0	Rover-R	Per Area	50
☐ 0	Support-S	Per Other Location	10

All A B C

2. Click 'Add' to add a new expense.
 - a. If the expense is one that you want to give an exact amount to each worker of a position, I recommend using 'lump sum'. Define the amount you want to give the worker in the 'Rate' field. Leave the sub-obj field blank.

Expense Add Fields in red are required.

Item:

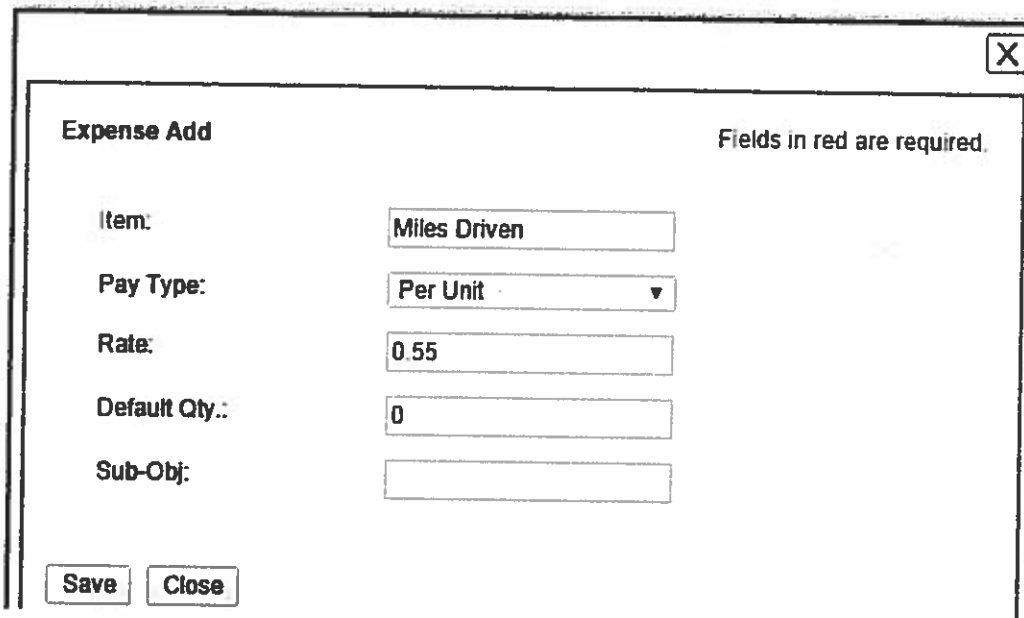
Pay Type:

Rate:

Sub-Obj:

- b. If the expense is an optional payment for a position, it would be best to use the pay type per unit for the expense. For example Mileage – some workers may need to be reimbursed for this. Having this expense setup as per unit, the mileage reimbursement will only be applied to the worker IF you populate how many miles driven. If you leave this expense blank in the worker's payroll profile, then they won't be getting any money for miles.
 - i. Setup the expense like so:
 1. Pay type: per unit
 2. Rate: the amount you want to give per mile
 3. Default qty: this you can populate with '0' or a number.
 - a. Leaving it at 0, this would start every position off receiving 0.00 for miles. You then would have to type in the amount the worker drove for the system to then to the math of how much they should receive.

- b. Populating this with a number, for example '10', this would start everyone off saying they drove '10' miles. So $10 \text{ miles} \times 0.55 = \5.50 . This means every worker would start out with \$5.50 for miles. You of course in the worker's payroll profile edit the number 10 if needed.
- c. Leave sub-obj blank.



The image shows a screenshot of a software dialog box titled "Expense Add". In the top right corner of the dialog is a close button with an "X" icon. Below the title bar, on the right side, is the text "Fields in red are required." The dialog contains five input fields arranged vertically, each with a label to its left: "Item:" with the text "Miles Driven" inside the field; "Pay Type:" with a dropdown menu showing "Per Unit" and a downward arrow; "Rate:" with the text "0.55" inside the field; "Default Qty.:" with the text "0" inside the field; and "Sub-Obj:" with an empty field. At the bottom left of the dialog are two buttons: "Save" and "Close".

Setting up extra expense pay for job titles

Once you have your expense settings setup, you can apply these to the positions that should receive these types of expenses.

1. In the job title settings tab – click 'edit' across from a position.
2. In the edit screen, notice at the bottom the expenses. Check the box next to the expense you want to be present in the payroll profile for this position.
3. Click 'save' once finished.

You will need to perform these 3 steps for every job title – setting up each expense you want to be present in the payroll portion for the job title.

Election Job Title Edit

Abbreviation: AC Job Title: Amount: Lump Sum

Ball Order: 0 Pay Type: Payment Amount: 125.000

Job Type: Per Precinct Target: 1 Day: 1

Need Certification?: Yes Work Time: 05 AM - 06 PM - 30

Need Package: 1 Party Affiliation Needed: Yes

Cash Requirement: Yes

Allow Half Day Shift: No

Title: Rate: 10.000 Quantity: 0.00

Phone: Rate: 0.000 Quantity: 0.00

Message: Rate: 0.000 Quantity: 0.00

Save

The Job Title has been assigned to some election officers. The included expenses cannot be cancel

Training Payment

Training payment is applied to workers only if the training class section they are assigned to has the completed status set to 'yes'.

The class payment comes from the training class type.

Defining the training class pay

1. Training Tab → click Training Settings
2. In the training settings screen, click 'edit' across from a class type. For each class type, you can define the payment that the worker should receive for completing the class.
 - a. Need pay? – check this box if you want the workers to receive a payment for completing a class section of this class type.
 - b. Pay Type – define if the payment should be a lump sum or paid per unit (hourly).
 - c. Payment – define the amount to be given.
 - i. If lump sum – define the total amount the worker should receive
 - ii. If per unit – define the amount the worker should receive per unit (or per hour). The classes that are setup to be paid per unit will calculate the class payment based on how many hours the class type is set at.
 1. For example if the class is set to be 3 hours and the 'per unit' payment is \$10, the workers will automatically receive \$30. You will be able to edit the number of hours the worker completed in the payroll tab.
 - d. Paid To – this allows you to define who shall receive training payment if the worker did or did not work on election day
 - i. Workers who worked – if the class type is set to this, then only workers who have election day attendance can receive this class payment.
 - ii. Anyone who completed training – if the class type is set to this, then you will be able to send workers who did not work on election day to payroll to receive this class payment.
 - e. Training Hours – this is important to fill out for the class types that are set to pay 'per unit'. It'll calculate the training payment automatically by using the 'PER UNIT' amount x Training Hours

3. Click 'Save'.

Training Class Type Add/Edit

Back View Next>> Save Save/Next

Class Type Code: 3

Class Type Name: Chief & Asst Chief T

Targeted Groups: New Election Officers
Active Election Officers
Student Election Officers
County Staff
Organizations

Job Title: Assistant Chief
Chief
Officer
Rover
Support

Pre-Required Class: None

Need Pay?: ☒

Pay Type: Lump Sum

Payment: 20,000

Training Hours: 0.00 (e.g. 3.00)

Description:

Save

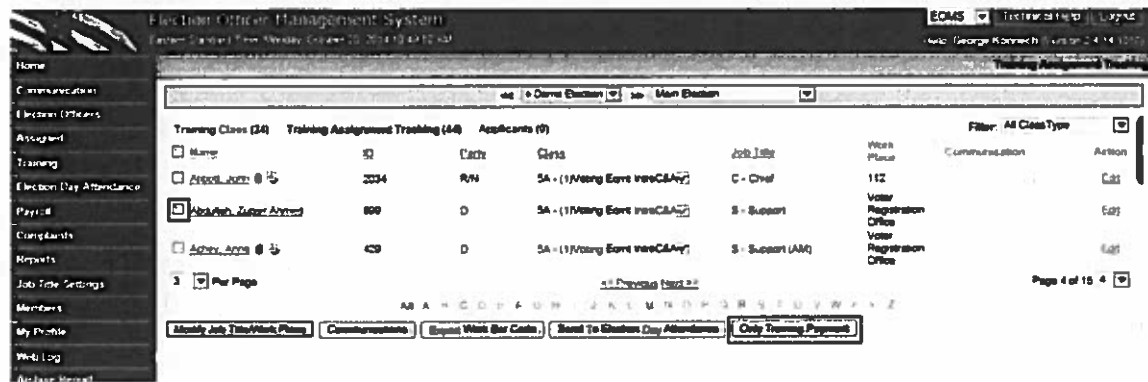
Sending workers to payroll to receive training payment only

This feature is used if you were looking to pay a worker for their completed training class(es) but not pay them for their election day work.

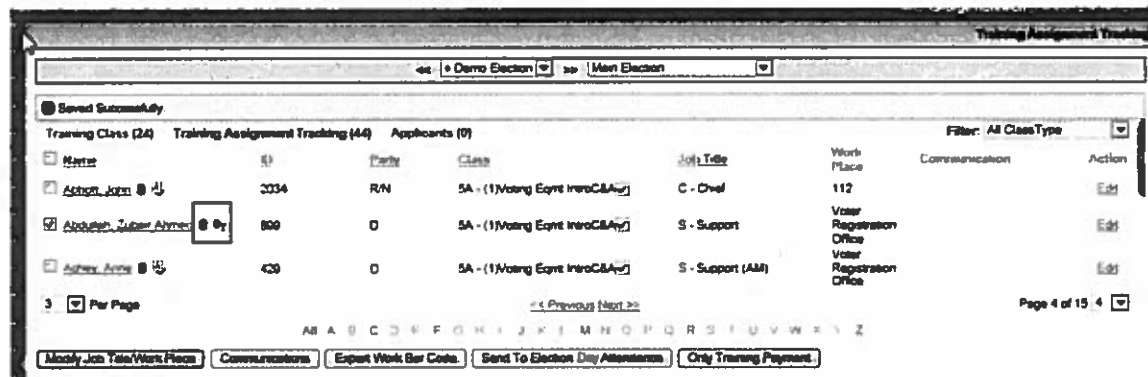
There are multiple places to get workers to the payroll tab for training payment only.

Send to payroll for only training payment from the Training Assignment Tracking tab

1. Training tab → click on training assignment tracking tab
2. In this tab, find the worker desired that should only receive their training day payment. Check the box next to their name and then click 'only training payment'

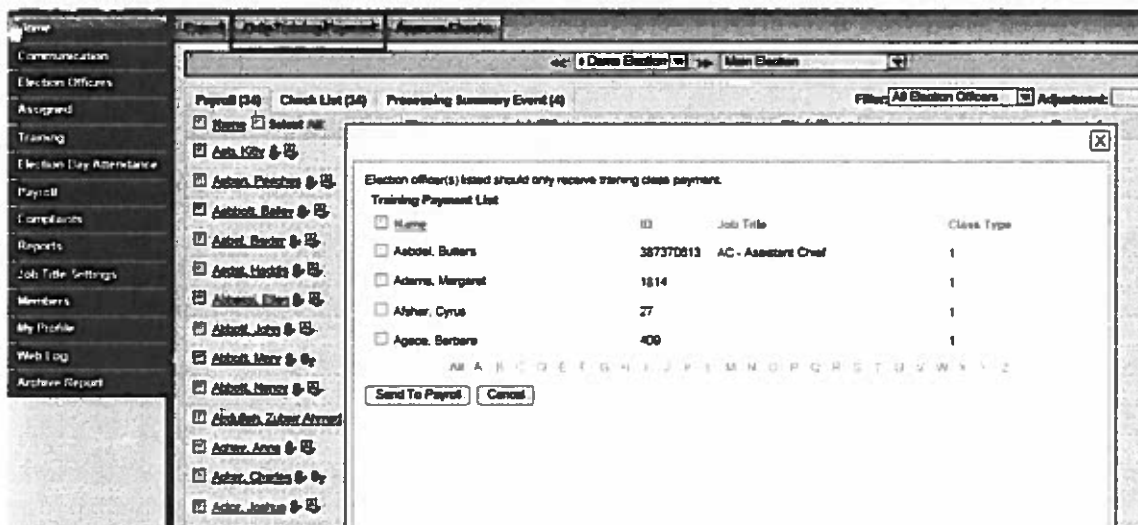


3. A popup will appear asking if you are sure you want to continue with this action. Click OK.
 - a. This will add the worker's name into the payroll tab.
 - b. Within the training assignment tracking tab, the worker's name will have 2 new icons next to it: a dollar sign depicting they are in the payroll tab and a 'T' with the dollar sign depicting they were sent to payroll only for training payment.



Send to payroll for only training payment from the Payroll tab

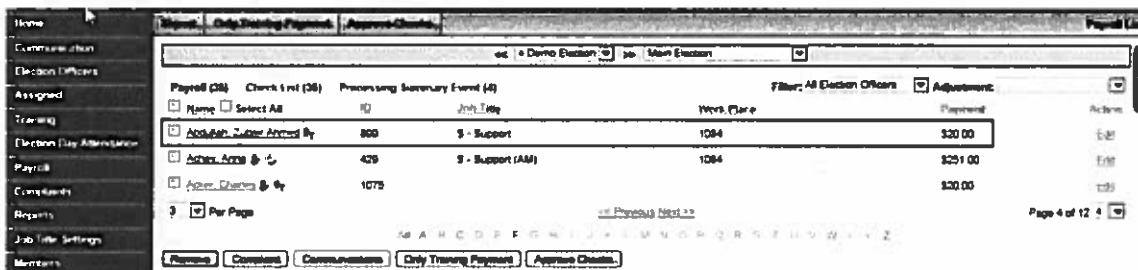
1. Payroll tab → click Only Training Payment. This will list the workers who currently have a completed training class AND have not yet been sent to the 'Election Day attendance' tab or the payroll tab.



2. Click the check box next to the desired worker(s). Then click 'Send to Payroll'.
 - a. This will add the worker's name to the payroll tab to receive ONLY their training class payment.

Review the worker's that have 'only training payment' within the payroll tab

1. Click on the payroll tab. The workers who are in this tab to receive only training payment will have this icon next to their name: 
2. Across from their name you'll see the training class payment. This is the worker's grand total they should receive.



3. Click 'edit' across from their name to see the payment information.
4. The top portion of the payroll edit feature always lists the training class(es) the worker will be receiving payment for

Payroll Edit - Abdullah, Zubair Ahmed Rating:

Mileage:

Job Title: S - Support Shift: Work Place: 1084

Attendance Records Edit

Attendance Remark:

Payroll Note:

Save

School Pay

Per Unit	Qty	Total
5A - (1) Voting Egmt IntroC&A		\$20.000 ☐ Waive

Working Payment

Per Unit	Qty	Total
Amount		0.000

Adjustment Payment

Per Unit	Qty	Total
Grand Total:		\$20.00

☐ Approved

Check #:

☐ Void

Notes:

Adjust Check Save

Sending workers to the payroll tab for Election Day pay

The first step to getting workers to the payroll tab is to verify that they have the correct information documented for them:

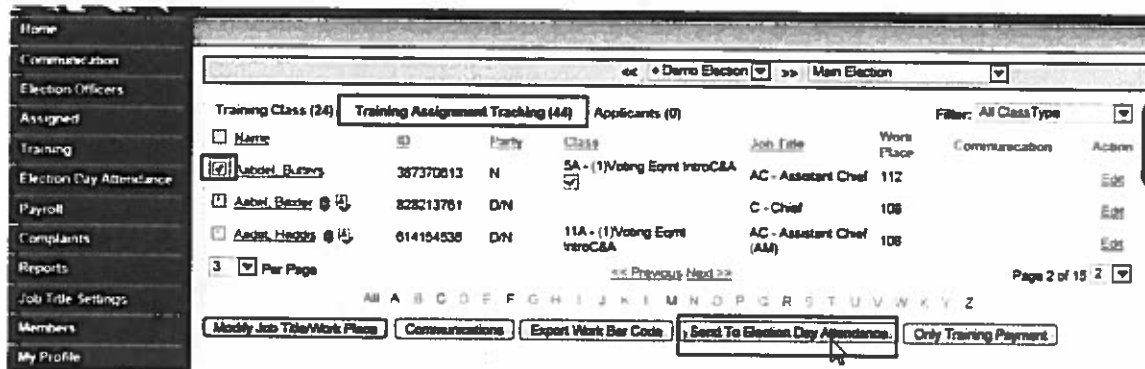
- Correct work assignment?
- Is their training class information documented correctly? For example are the classes they completed marked as 'completed'?

The next step is to get the workers to be listed in the 'election day attendance' tab. This tab is a holding place where you can verify that you are sending the correct group of workers into the payroll tab. There are 2 ways to get the workers into the Election Day attendance tab

Sending workers to 'election day attendance' tab from the 'training assignment tracking' tab

1. ~~Training tab~~ → click training assignment tracking. *IN FLOWCHART*
2. In this tab, find the worker(s) desired. Check the box next to their name.
3. Click 'send to election day attendance'. A popup will appear asking if you are sure you want to continue with this action. Click 'OK' to continue.

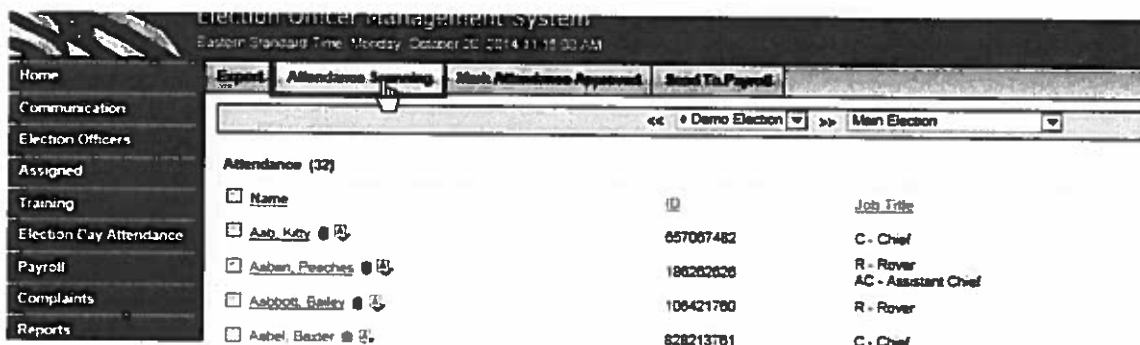
Home



Sending workers to 'election day attendance' tab from the 'election day attendance' tab

You can get workers to the Election Day attendance tab by scanning their work bar code.

1. Click the 'Election Day Attendance' tab. Click the 'Attendance Scanning' button.



2. Scan the bar code into the text box. Or you can type the bar code # into the box.
 - a. Click 'enter' on your keyboard. Or, if scanned, it should automatically recognize the bar code #.
3. The worker's name and assignment should appear at the bottom of the screen. This will move the worker's name into the Election Day attendance tab.

Back Assign New Election Officer

+ Demo Election Main Election

● Saved Successfully.

Bar Code: Enter

Remark: Undo

☐ Clear remark after saved.

this portion is populated based on the bar code scanned.

And the job title/work place is populated based on the worker's election work assignment.

Bar Code: 012055408005788

Election Officer: Test McTest

ID: 564080057

Job Title: C - Chief Working Place: Precinct - Building:

Attendance: 10/23/2014 11:10:31 AM In

Modify Job Title/Work Place

Sending workers to the 'payroll' tab from the 'election day attendance' tab

1. In the Election Day attendance tab, find the desired worker(s). Then click the check box next to their name.
2. Click 'Send to Payroll'. A popup or 2 will appear. Click 'ok'. The worker's name should then get icons placed next to their name. This is an indicator to help you know who has and hasn't been sent to payroll.
3. Note: there is a filter in the top right corner of this tab to help you see who has and hasn't been sent to payroll so far.

Home Communications Election Officers Assigned Training Election Day Attendance Payroll Complaints Reports Job Title Settings Settings My Profile

Report Attendance Summary Work Attendance Approval Send To Payroll Election Day Attendance

es + Demo Election Main Election

Attendance (20)

Name	ID	Job Title	Work Place	Rating	Action
☐ Apple... [icon]	2012	O - Officer (PM)	112		Edit
☐ Adams, Margaret	1814	AC - Assistant Chief			Edit
☐ Adams, [icon]	1530	C - Chief	313		Edit

3 Per Page

AB A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Printed Complaints Communications Work Attendance Approval **Send To Payroll** Set Rating As

Page 4 of 11 4

Payroll Tab

Review payroll amounts for workers

1. Click edit across from a worker's name.
 - a. The worker's completed training class payment will be listed first:

Back << Previous Next >> Save Save & Next				
Payroll Edit - Zahid, Zara Rating:				
Mileage:				
Job Title	Shift	Work Place		
O - Officer				
Attendance Records Edit			School Pay Per Unit Qty. Total	
10/20/2014 9:29:04 AM In O - Officer			1A - (1) Voting Egmt IntroC&A \$20.000 ☐ Waive	
Attendance Remark			Working Payment Per Unit Qty. Total	
			Job Title: O - Officer Shift: AM (05:00 AM - 01:00 PM)	
			Pay: \$100.000 ☐ Waive	

b. Next is the worker's Election Day payment.

- i. If the payment was defined as 'lump sum', the pay amount will be listed in the grey box.

Back << Previous Next >> Save Save & Next				
Payroll Edit - Zahid, Zara Rating:				
Mileage:				
Job Title	Shift	Work Place		
O - Officer				
Attendance Records Edit			School Pay Per Unit Qty. Total	
10/20/2014 9:29:04 AM In O - Officer			1A - (1) Voting Egmt IntroC&A \$20.000 ☐ Waive	
Attendance Remark			Working Payment Per Unit Qty. Total	
			Job Title: O - Officer Shift: AM (05:00 AM - 01:00 PM)	
			Pay: \$100.000 ☐ Waive	
Other Expenses				

- ii. If the payment is 'per unit', you'll see the amount they should receive per unit (per hour). Define the number of hours they worked in the text box for total hours.

Back << Previous Next >> Save Save & Next				
Payroll Edit - Alkire, William Rating:				
Mileage: 25.5 miles				
Job Title	Shift	Work Place		
R - Rover				
Attendance Records Edit			School Pay Per Unit Qty. Total	
10/20/2014 11:58:33 AM In R - Rover Area			Working Payment Per Unit Qty. Total	
Attendance Remark			Job Title: R - Rover Work Day: 1 Work Time: 07:00 AM - 07:00 PM	
			Total Hours: 0.00	
			Hourly Rate: 10.000	
			Pay: \$0.000 ☐ Waive	
Other Expenses				

c. Next are the 'Other Expenses'. The expense feature will be populate based on the job title the worker is assigned to and which expenses were setup for that job title.

- i. Per unit expenses need you to define the 'unit' (if applicable).
- For example if the worker should receive payment for 'phone', type a 1 in the text field. This will assign the worker \$10.00
 - For example for miles, you can define 5.50 for miles driven and the system will calculate the total amount automatically.

ii. Lump sum expenses will automatically be applied.

Back	<< Previous	Next >>	Save	Save & Print
Payroll Edit - Zahid, Zara Rating:				
Mileage:				
Job Title	Shift	Work Place	School Pay Per Unit Qty. Total 1A - (1) Voting Eqmt \$20.000 ☐	
O - Officer			IntroC&A Waive	
Attendance Records <u>Edit</u>			Working Payment Per Unit Qty. Total	
10/20/2014 9:29:04 AM In O - Officer			Job Title: O - Officer	
Attendance Remark			Shift: AM (05:00 AM - 01:00 PM)	
			Pay: \$100.000 ☐	
			Waive	
			Other Expenses	
			Phone \$10.000 0.00 \$0.000 ☐	
			Waive	
			Mileage \$0.550 0.00 \$0.000 ☐	
			Waive	
			Extra 1 \$0.000 0.00 \$0.000 ☐	
			Waive	
			Extra 2 \$10.000 0.00 \$0.000 ☐	
			Waive	
Payroll Note				

d. Next is the adjustment – this allows you to add or subtract an amount from the grand total.

- i. For example if you want to pay a worker \$10 extra dollars, type in 10.
- ii. If you need to subtract an amount from the grand total, type in a negative sign and the amount to take away. For example -10

Payroll Edit - Zahid, Zara Rating:				
Mileage:				
Job Title	Shift	Work Place	School Pay Per Unit Qty. Total 1A - (1) Voting Eqmt \$20.000 ☐	
O - Officer			IntroC&A Waive	
Attendance Records <u>Edit</u>			Working Payment Per Unit Qty. Total	
10/20/2014 9:29:04 AM In O - Officer			Job Title: O - Officer	
Attendance Remark			Shift: AM (05:00 AM - 01:00 PM)	
			Pay: \$100.000 ☐	
			Waive	
			Other Expenses	
			Phone \$10.000 0.00 \$0.000 ☐	
			Waive	
			Mileage \$0.550 0.00 \$0.000 ☐	
			Waive	
			Extra 1 \$0.000 0.00 \$0.000 ☐	
			Waive	
			Extra 2 \$10.000 0.00 \$0.000 ☐	
			Waive	
Amount Adjustment Payment: 0.000				
Grand Total: \$120.00				

e. Grand Total – this is all the payments added up. This would be the amount the check is made out for for the worker:

- i. School pay + working payment + all expense payment(s) + adjustment payment = grand total

Payroll Edit - Zahid, Zara Rating:			
Mileage:		School Pay	Per Unit Qty. Total
Job Title	Shift	Work Place	1A - (1) Voting Error IntroC&A
O - Officer			\$20.000 ☐
Attendance Records <u>Edit</u>		Working Payment	Per Unit Qty. Total
10/20/2014 9:29:04 AM In O - Officer		Job Title: O - Officer	
Attendance Remark		Shift: AM (05:00 AM - 01:00 PM)	
		Pay:	\$100.000 ☐
Payroll Note		Other Expenses	
		Phone	\$10.000 0.00 \$0.000 ☐
		Mileage	\$0.550 0.00 \$0.000 ☐
		Extra 1	\$8.000 0.00 \$0.000 ☐
		Extra 2	\$10.000 0.00 \$0.000 ☐
		Amount	
		Adjustment Payment:	0.000
		Grand Total:	\$120.00
		☐ Approved	
		Check #:	
		☐ Void	
		Notes:	
Save		Adjust Check Save	

Approving Payments

Payments need to be marked as approved to have them be within the payroll export file.

Marking approved in the payroll edit screen for a worker

1. In the payroll tab, click 'edit' across from the worker's name.
2. Edit the payment as needed.
3. Click the 'Approved' check box. This will make the payment documentation be 'view only'.
4. Click 'Save'. This payment now will be within the payroll export file when it is ready to be produced.

Payroll Edit - Zahid, Zara Rating:		School Pay	Per Unit	Qty.	Total	
Mileage:		1A - (1) Voting Egrs			\$20.000	☐ Waive
Job Title	Shift	Work Place				
O - Officer		Working Payment	Per Unit	Qty.	Total	
Attendance Records <u>Edit</u>	Job Title: O - Officer					
10/20/2014 9:20:04 AM in O - Officer	Shift: AM (05:00 AM - 01:00 PM)					
Attendance Remark	Pay:				\$100.000	☐ Waive
	Other Expenses					
	Phone	\$10.000	0.00		\$0.000	☐ Waive
	Mileage	\$0.550	0.00		\$0.000	☐ Waive
	Extra 1	\$6.000	0.00		\$0.000	☐ Waive
	Extra 2	\$10.000	0.00		\$0.000	☐ Waive
	Amount					
	Adjustment Payment:				0.000	
	Grand Total:				\$120.00	
	☐ Approved					
	Check #:					
	☐ Void					
	Notes:					

Marking multiple worker payments as approved

1. In the payroll tab, you can check the box next to the desired worker(s) name and click 'approve checks'.
2. Or, you can click 'select all'. This will select everyone in the tab. Then click 'approve checks'.

Home	Export	Only Training Payment	Approve Checks
Communication	<< Demo Election >> Main E		
Election Officers			
Assigned			
Training			
Election Day Attendance			
Payroll			
Complaints			
Reports			
Job Title Settings			

Payroll (39)	Check List (39)	Processing Summary Event (4)
☐ Name ☐ Select All	ID	Job Title
☐ Aab, Kitty ☐ A	657067482	C - Chief
☐ Aaban, Peaches ☐ A	186262626	R - Rover AC - Assistant Chief
☐ Aabbott, Bailey ☐ A	108421760	R - Rover
☐ Aabel, Baxter ☐ A	828213761	C - Chief
☐ Aadst, Haddis ☐ A	614154535	AC - Assistant Chief (AM)

Un-approving a payment

1. In the payroll tab, click edit across from a worker's name.
2. Unclick the 'approved' check box. Then click save.
3. This will make the payment documentation be available to be edited again.
4. Click 'save' to save any changes.

Payroll Edit - Kahn, Aaron Rating:

Mileage:

Job Title Shift Work Place

O - Officer

Attendance Records Edit

10/20/2014 11:32:39 AM In O - Officer

Attendance Remark

Payroll Note

Save

School Pay	Per Unit	Qty.	Total
Working Payment	Per Unit	Qty.	Total

Job Title: O - Officer
Shift: AM (05:00 AM - 01:00 PM)

Pay: ☐ Wave

Other Expenses

Phone	\$10.000	0.00	\$0.000 ☐ Wave
Mileage	\$0.550	0.00	\$0.000 ☐ Wave
Extra 1	\$0.000	0.00	\$0.000 ☐ Wave
Extra 2	\$10.000	0.00	\$0.000 ☐ Wave

Amount

Adjustment Payment:

Grand Total:

☒ Approved at 10/20/2014 12:13 PM by Konnech, George

Check #:

☐ Void

Notes:

Save

Removing workers from the payroll tab

If a worker was placed in the payroll tab that shouldn't be, you can easily remove them from this tab. Removing them from the payroll tab will push them back in the election day attendance tab. OR – if they were in the payroll tab for 'only training payment', they'll be removed out of payroll and remain within the assigned and training assignment tracking tab.

NOTE: you can only remove workers that have an un-approved payroll status.

1. In the payroll tab, click the check box next to the worker's name. then click 'Remove'.
 - a. If the worker's payment is marked as approved, you'll have to unapproved the payment first.

Producing the payroll export file

The payroll export is the excel file that gets populated with approved payments. Once the payroll export is populated, it gets documented with a 'PE#' (payroll event number) and it is stored in the database for you to review as needed.

When a worker has a payment within a 'PE#', this payment is stored in their worker profile as the amount they were paid for the election.

1. In the Payroll tab, click 'Check List'.
2. Click 'Payroll Export'.

Name	ID	Check#	Payment
Aab, Kitty	857067482		\$377.50
Aabari, Peaches	188262626		\$287.50
Aabbott, Bailey	108421780		\$201.40
Aabel, Baxter	828213781		\$213.20
Aadat, Haddis	814154535		\$235.20

3. The popup will list the workers who currently have an approved payment.

Employee ID	Last	First	Middle	PCT	Title	Shift	GRAND TOTAL
140302824	Zahra	Shelley	E		Officer	AM	\$110.00
815224627	Zahid	Ajmal			Officer	All Day	\$191.50
977224038	Zahid	Mahmood			Officer	AM	\$155.70
	Zeng	Heather		100	Officer	PM	\$181.50
Total							\$638.78

4. Click 'Export'. a popup will appear defining the 2 things you can do:
 - a. Click 'OK' to produce the PE# and lock in that the workers in this file shall receive the check amount defined in the grand total column.
 - i. Clicking 'OK' will produce for you the export file. The worker's payment will be marked in their payment history.
 - b. Click 'Cancel' to produce the export file for you to review before producing the actual PE#.

Reviewing the PE#s produced for the election

Each payroll export file that is produced will be available to review in the Processing Summary Event tab

1. Payroll tab – click on the 'Processing Summary Event' tab.
2. In this tab, you'll see all the different payroll export files.
 - a. Click 'export' across from the desired one to have the file open again in excel.
 - b. Click on the 'valid count' to see the names of the worker's that are part of this event.
 - c. Click on the 'void count' to see the names of workers who had their payment defined as 'void' since this export file was generated.
 - d. Click 'View' to see the full list of workers in this event.

Payroll (29) Check List (29) Processing Summary Event (4)									
PE#	Created Date	Created By	Valid Payment	Void Payment	Total Payment	Valid Count	Void Count	Action	
20141010084226	10/10/2014	Konnech, George	\$3,260.00	\$0.00	\$3,260.00	17		Export View	
20141010084254	10/10/2014	Konnech, George	\$645.00	\$0.00	\$645.00	3		Export View	
20141010086753	10/10/2014	Konnech, George	\$303.00	\$0.00	\$303.00	3		Export View	
20141010088826	10/10/2014	Konnech, George	\$129.00	\$0.00	\$129.00	1		Export View	
Total			\$4,337.00	\$0.00	\$4,337.00				