Contents

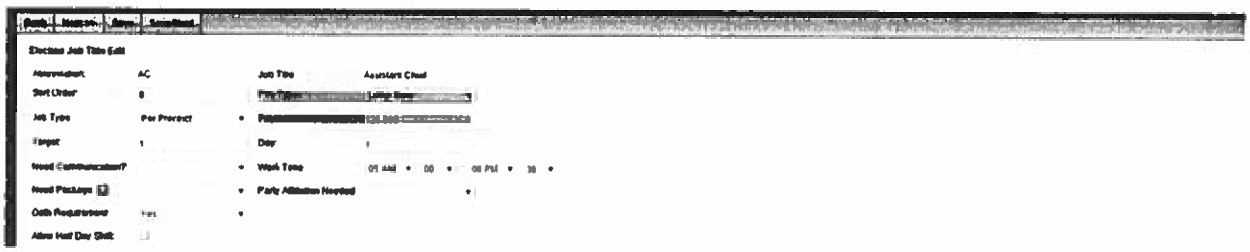
Job Title Settings

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:

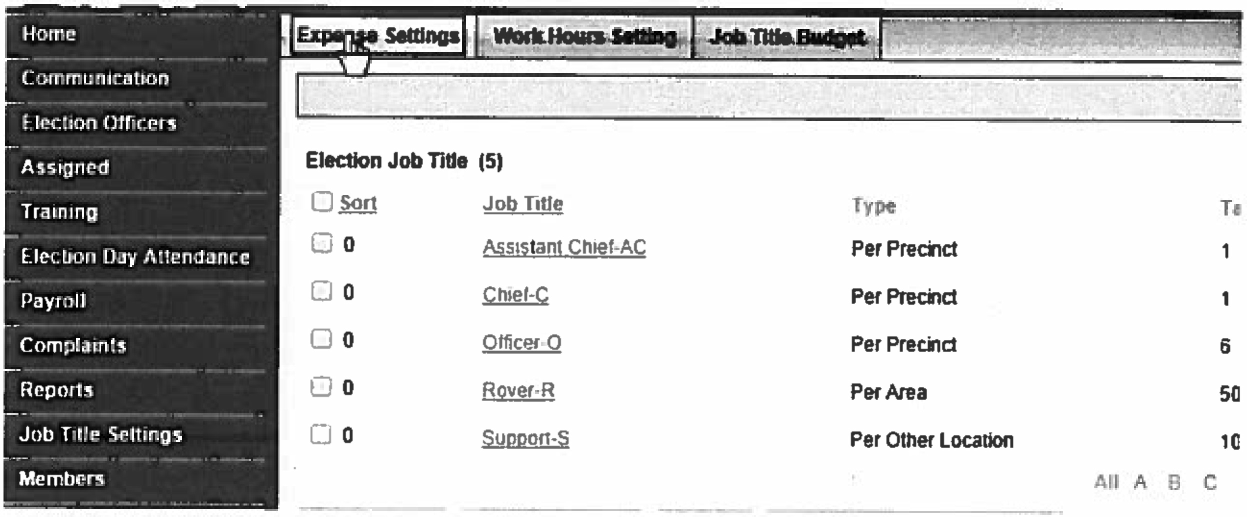
a. Pay Type: choose how you want this job title to be paid for their election day work:
    i. Lump sum = an exact amount the worker will receive for working Election Day for their job title assignment.
    ii. Per unit = the amount the worker should receive for each hour they work for their job title 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'.



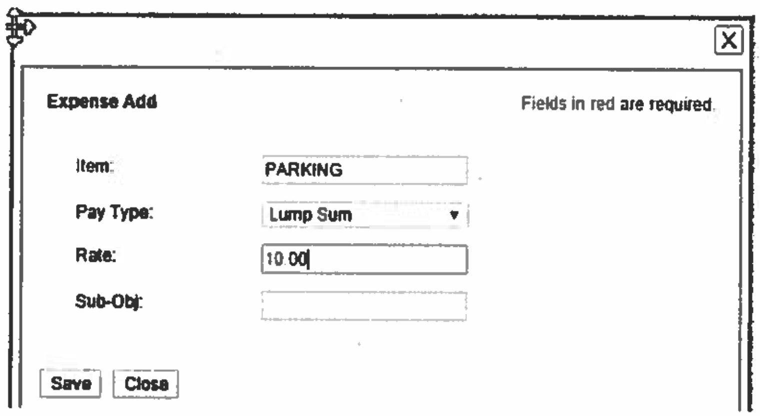
Defining Extra Expenses

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



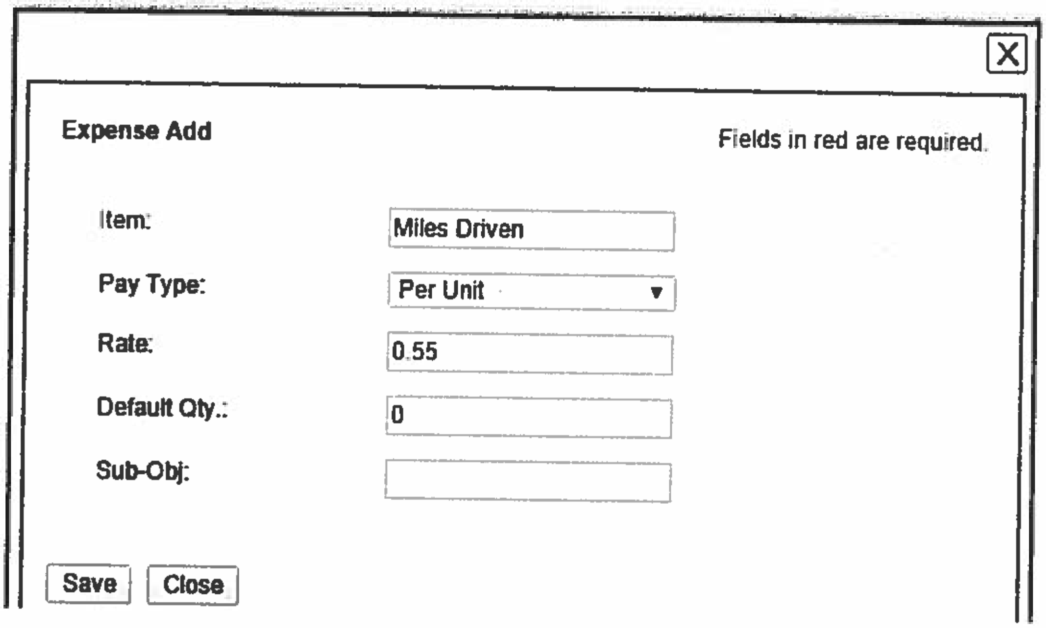
2. Click 'Add' to add a new expense.
    a. If the expense is one that you want to give an exact amount to each worker of a position, I recommend using 'lump sum'. Define the amount you want to give the worker in the 'Rate' field. Leave the sub-obj field blank.



    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 miles x 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.

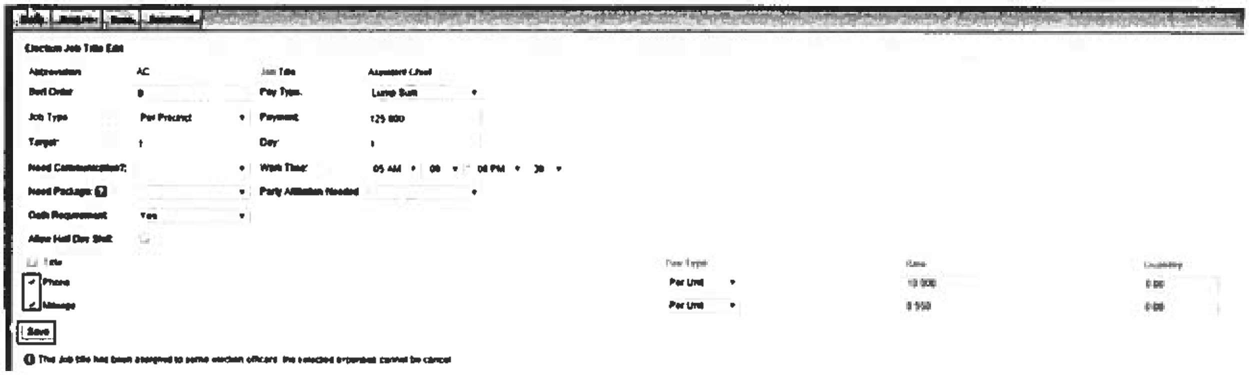


Setting up extra expense pay for job titles

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.



Training Payment

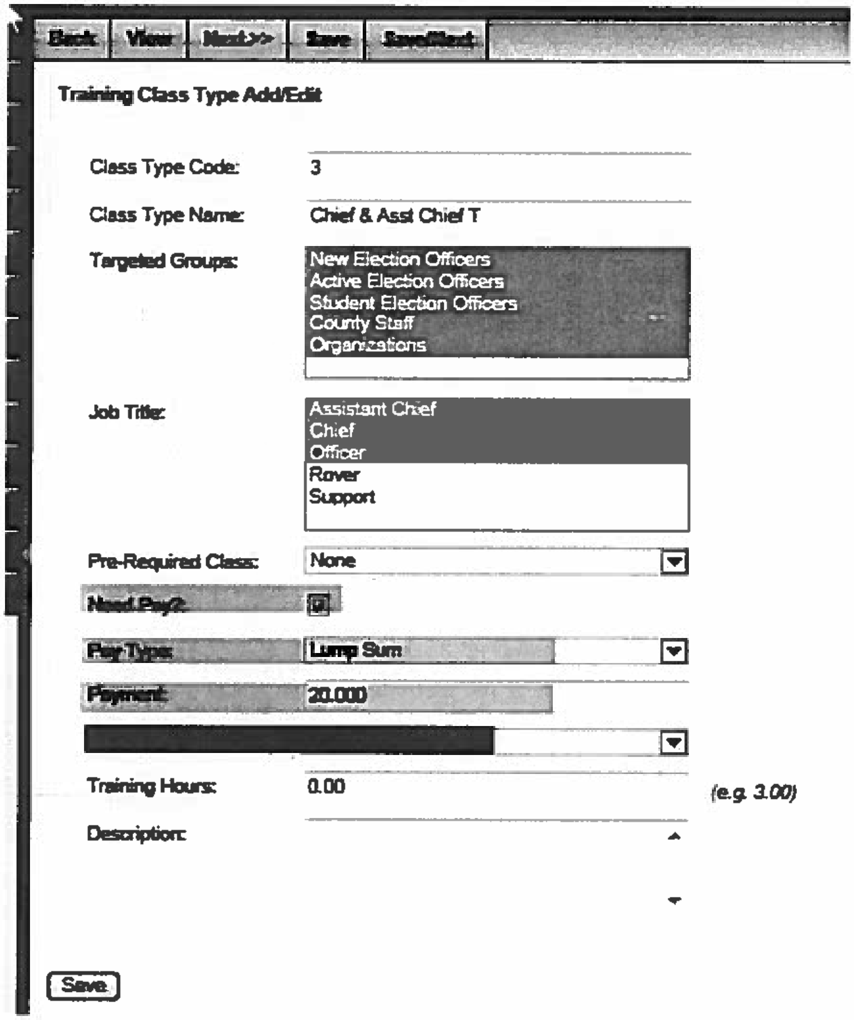
Training payment is applied to workers only if the training class section they are assigned to has the completed status set to 'yes'.

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’.



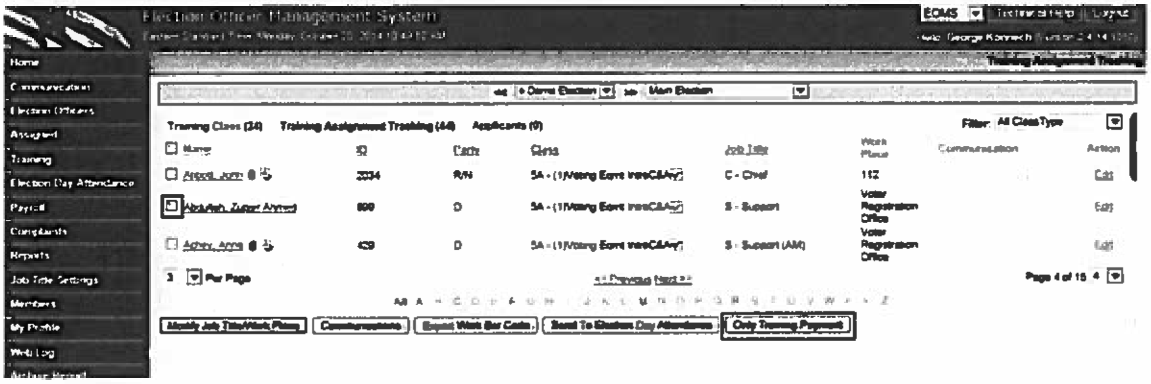
Sending workers to payroll to receive training payment only

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.

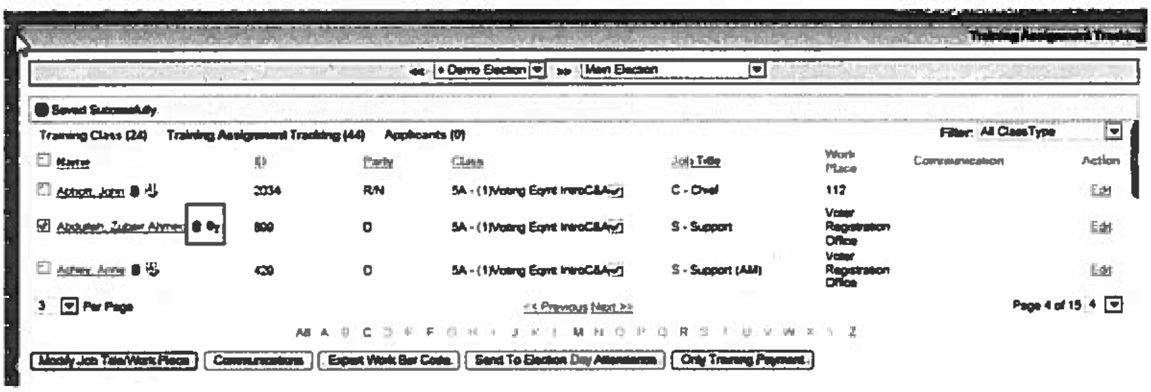
There are multiple places to get workers to the payroll tab for training payment only.

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’**

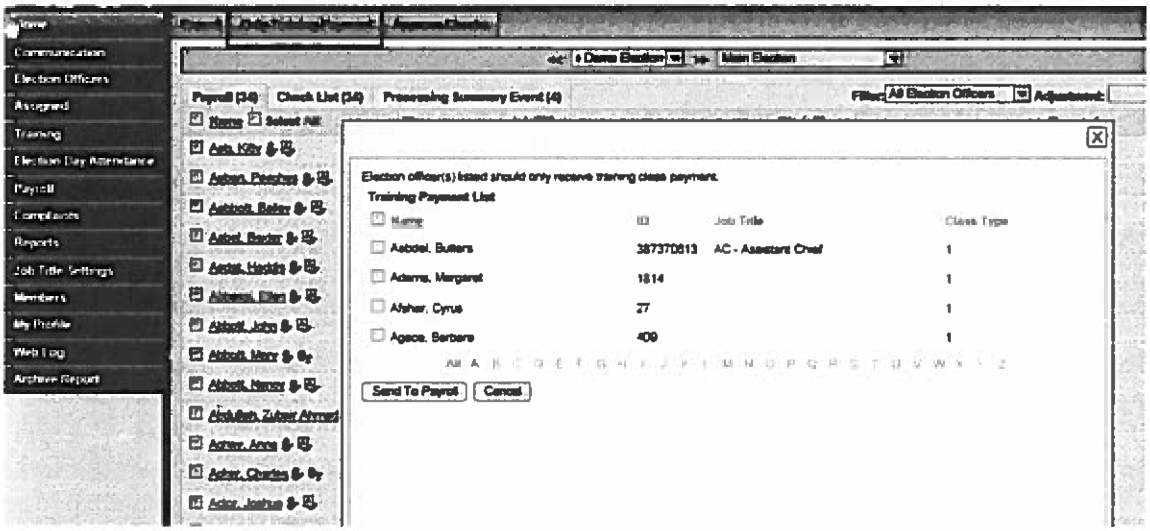


3. A popup will appear asking if you are sure you want to continue with this action. Click OK.
   a. This will add the worker's name into the payroll tab.
   b. Within the training assignment tracking tab, the worker's name will have 2 new icons next to it: a dollar sign depicting they are in the payroll 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

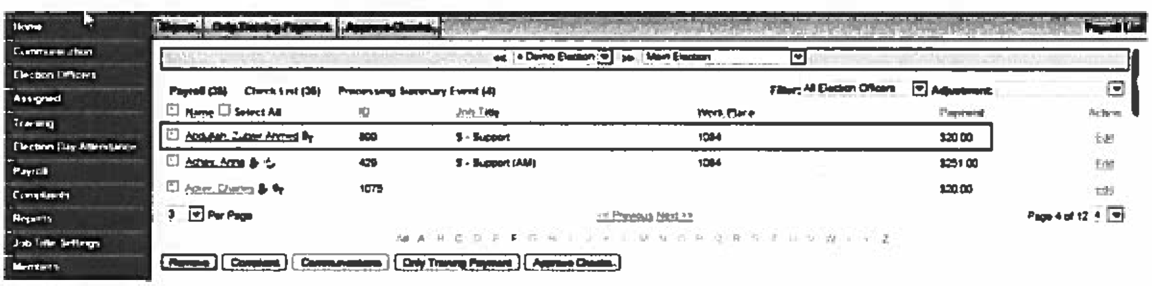
1. Payroll tab → click Only Training Payment. This will list the workers who currently have a completed training class AND have not yet been sent to the 'Election Day attendance' tab or the payroll tab.



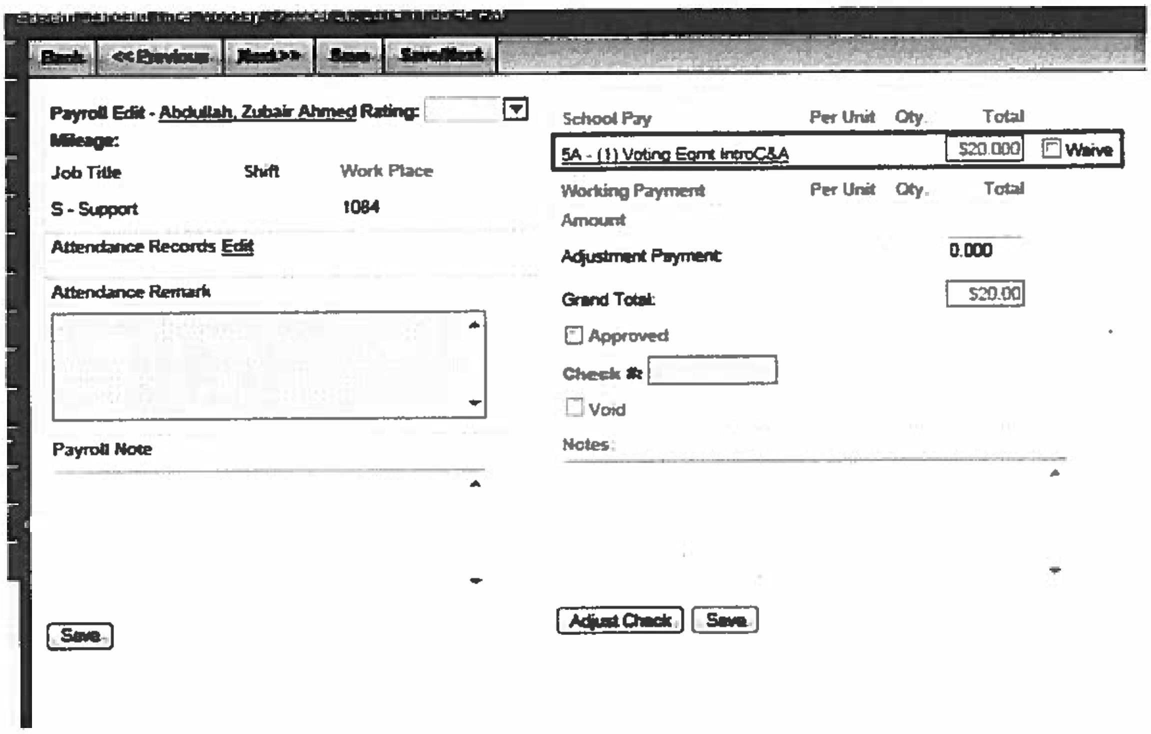
2. Click the check box next to the desired worker(s). Then click 'Send to Payroll'.
    a. This will add the worker's name to the payroll tab to receive ONLY their training class payment.

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: $^{\theta}$T
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



Sending workers to the payroll tab for Election Day pay

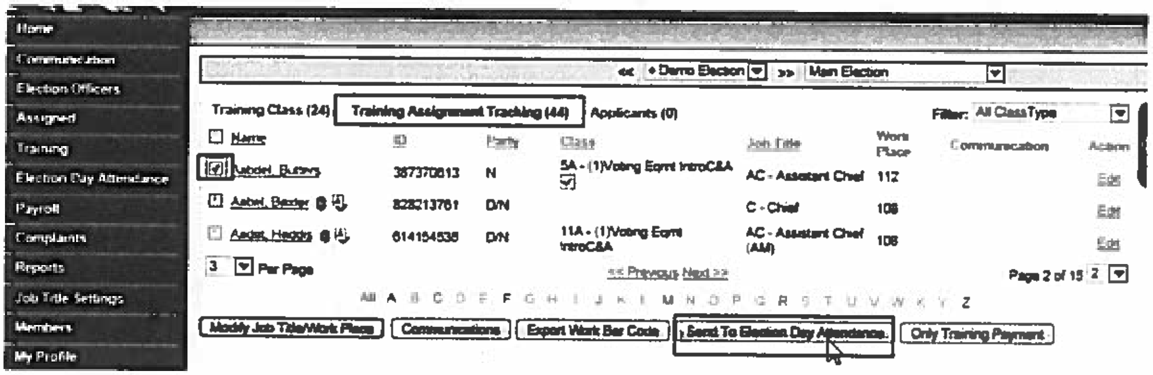
The first step to getting workers to the payroll tab is to verify that they have the correct information documented for them:

- 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

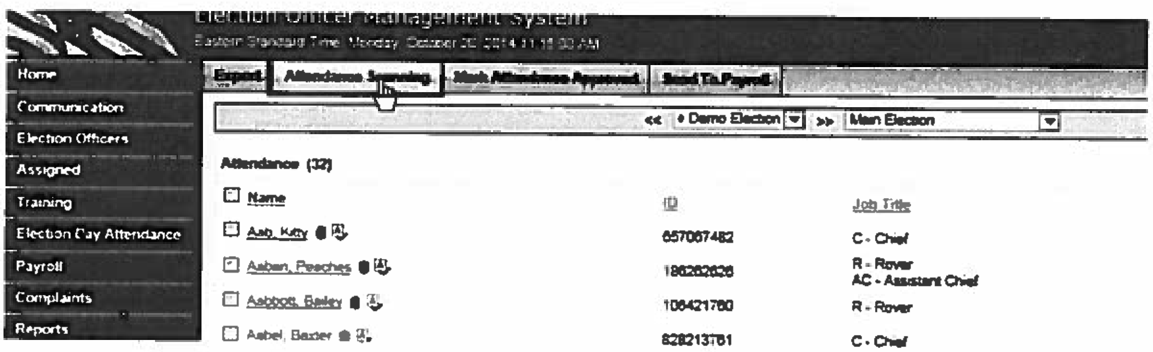
1. Home ~~Training tab~~ → click training assignment tracking. IN FLOWCHART
2. In this tab, find the worker(s) desired. Check the box next to their name.
3. Click 'send to election day attendance'. A popup will appear asking if you are sure you want to continue with this action. Click 'Ok' to continue.



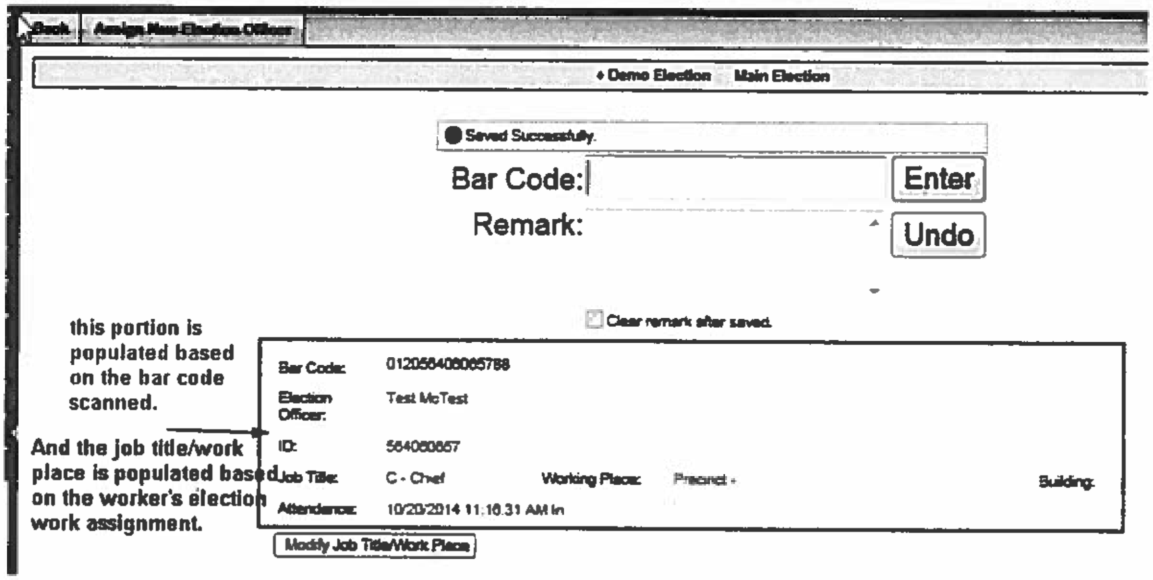
Sending workers to 'election day attendance' tab from the 'election day attendance' tab

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.

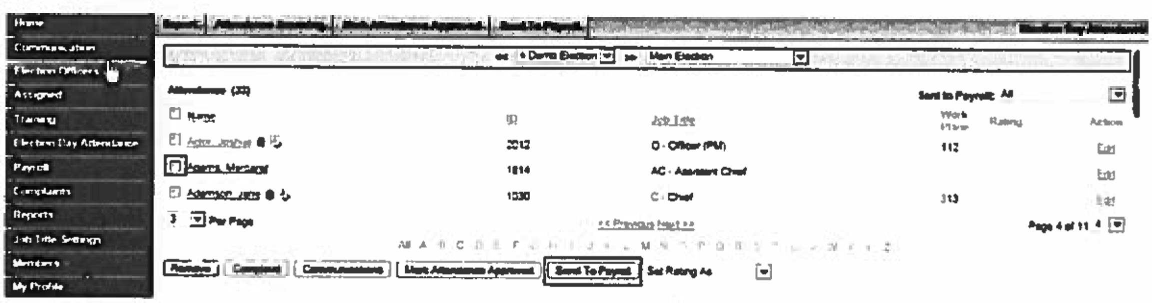


2. Scan the bar code into the text box. Or you can type the bar code # into the box.
   a. Click 'enter' on your keyboard. Or, if scanned, it should automatically recognize the bar code #.
3. The worker's name and assignment should appear at the bottom of the screen. This will move the worker's name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



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

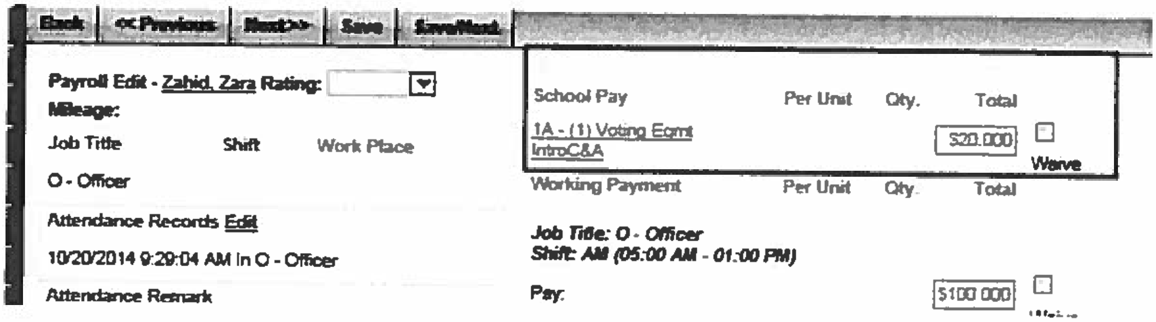
1. In the Election Day attendance tab, find the desired worker(s). Then click the check box next to their name.
2. Click 'Send to Payroll'. A popup or 2 will appear. Click 'ok'. The worker's name should then get icons placed next to their name. This is an indicator to help you know who has and hasn't 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.



Payroll Tab

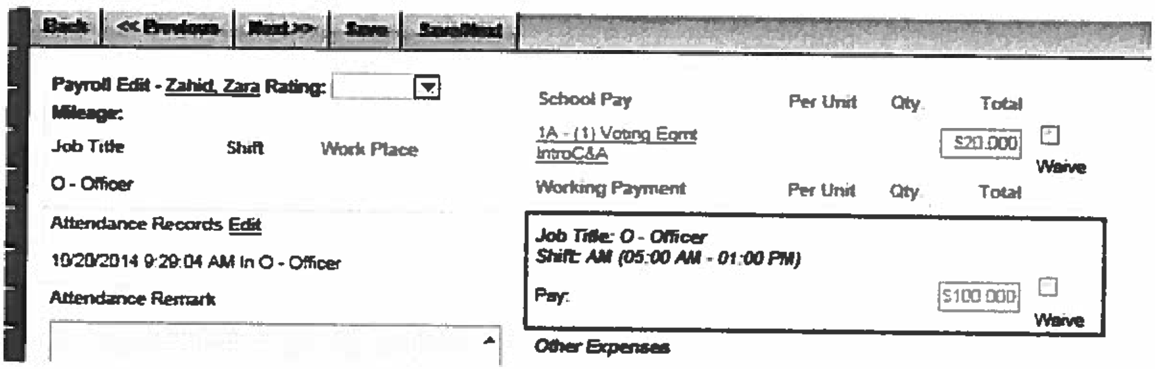
Review payroll amounts for workers

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

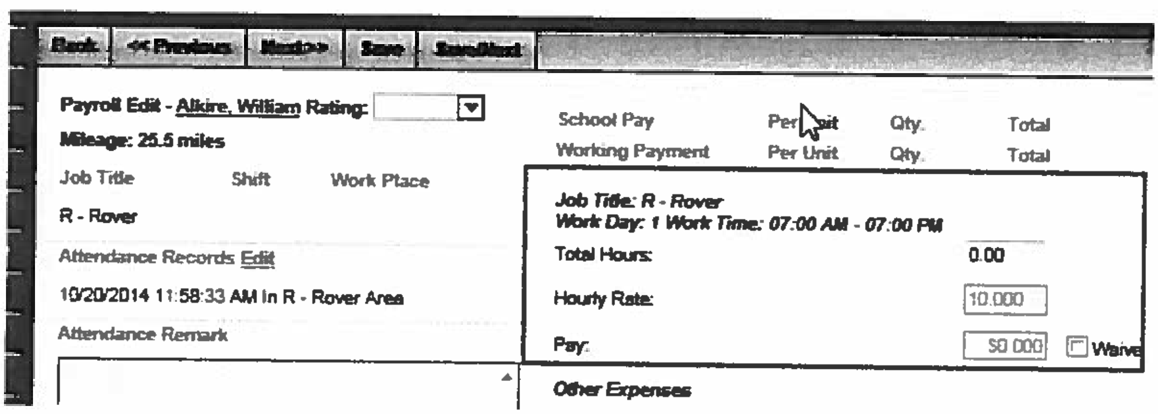


b. Next is the worker's Election Day payment.

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



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

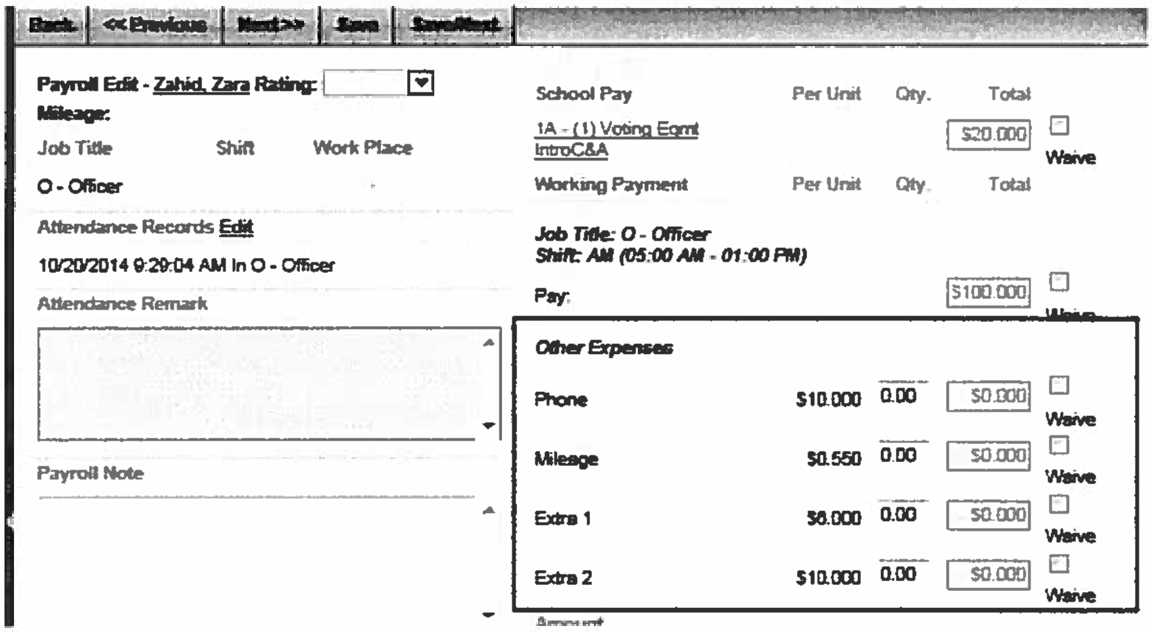


c. Next are the 'Other Expenses'. The expense feature will be populate based on the job title the worker is assigned to and which expenses were setup for that job title.

i. Per unit expenses need you to define the 'unit' (if applicable).

1. For example if the worker should receive payment for 'phone', type a 1 in the text field. This will assign the worker $10.00
2. For example for miles, you can define 5.50 for miles driven and the system will calculate the total amount automatically.

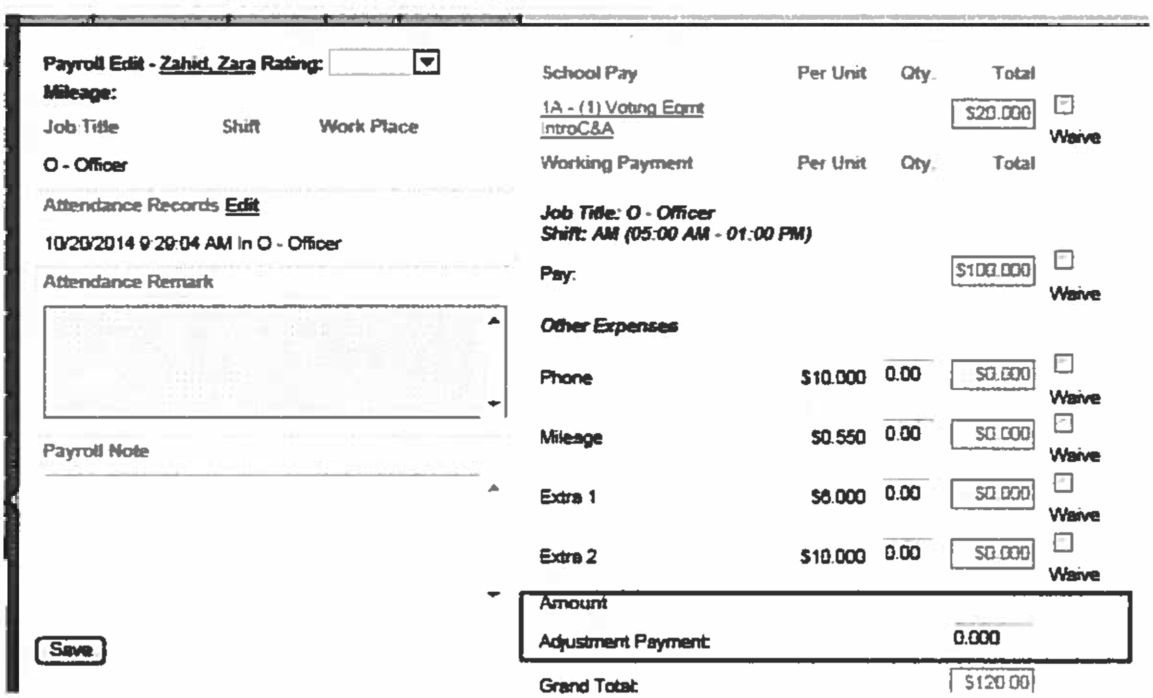
ii. Lump sum expenses will automatically be applied.



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

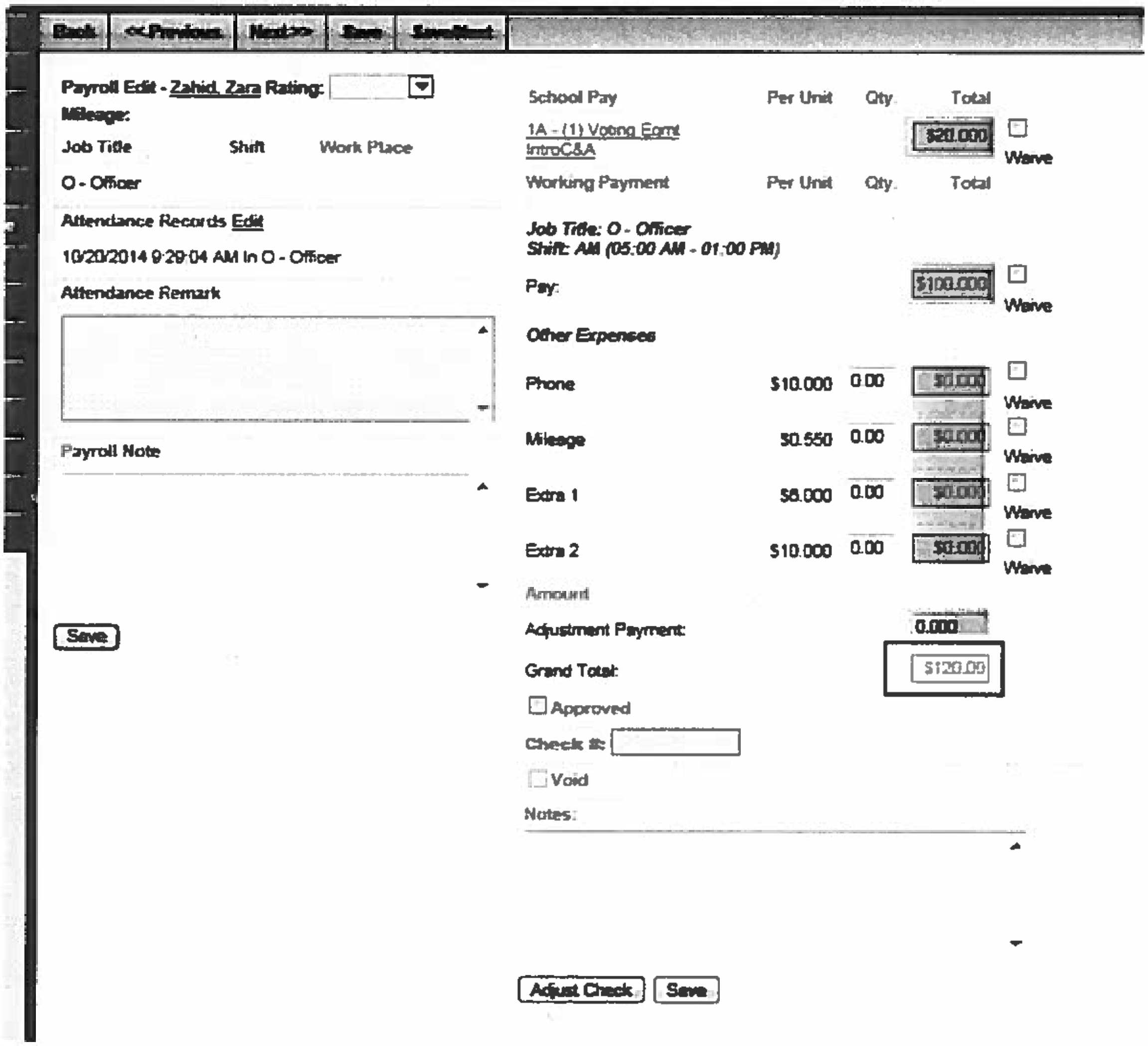
i. For example if you want to pay a worker $10 extra dollars, type in 10.

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



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

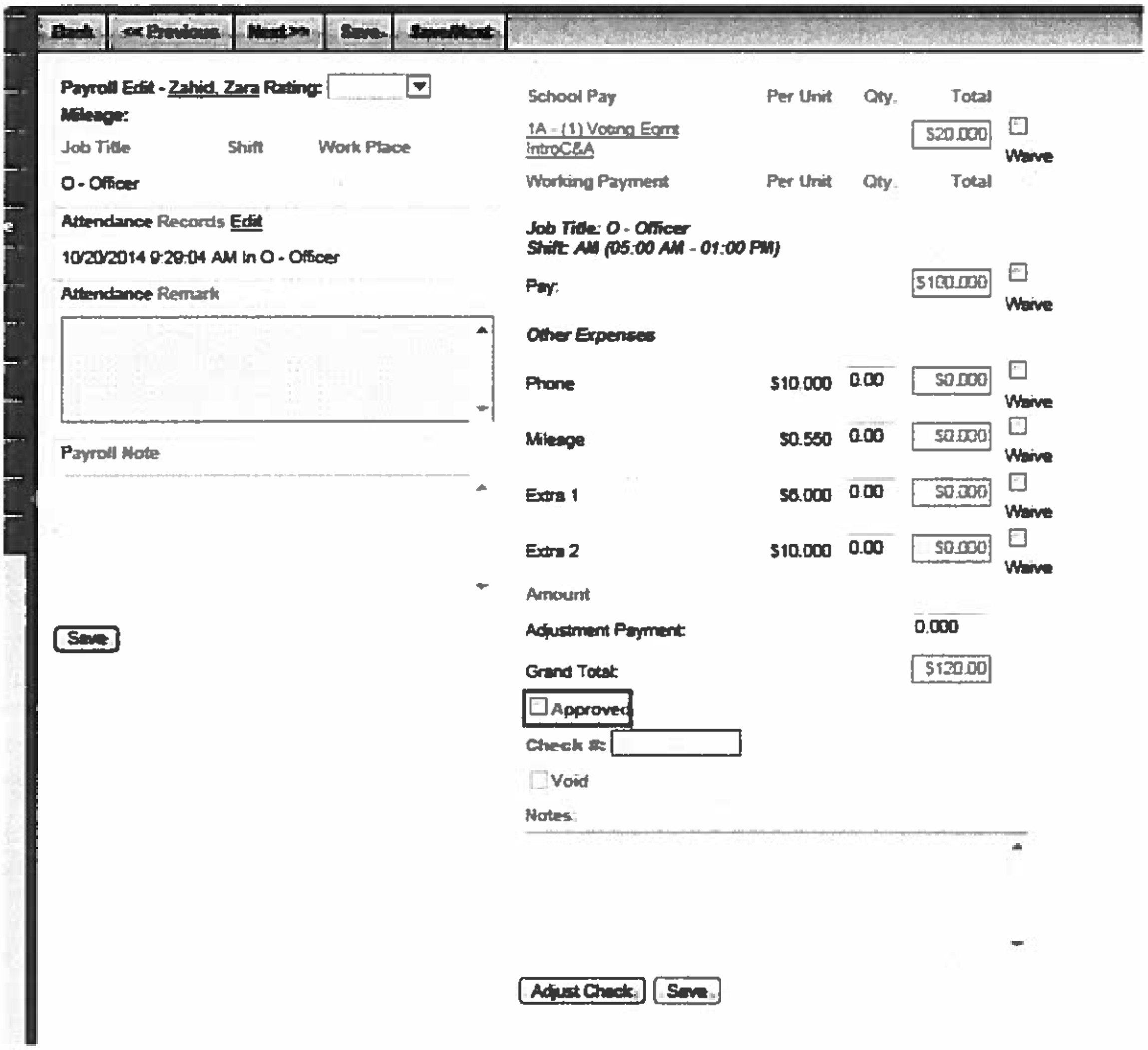


Approving Payments

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

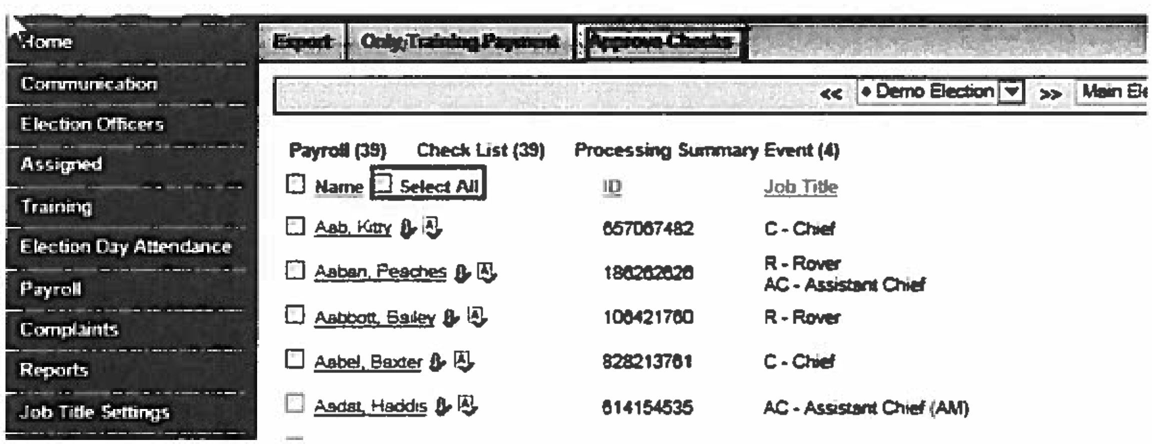
Marking approved in the payroll edit screen for a worker

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.



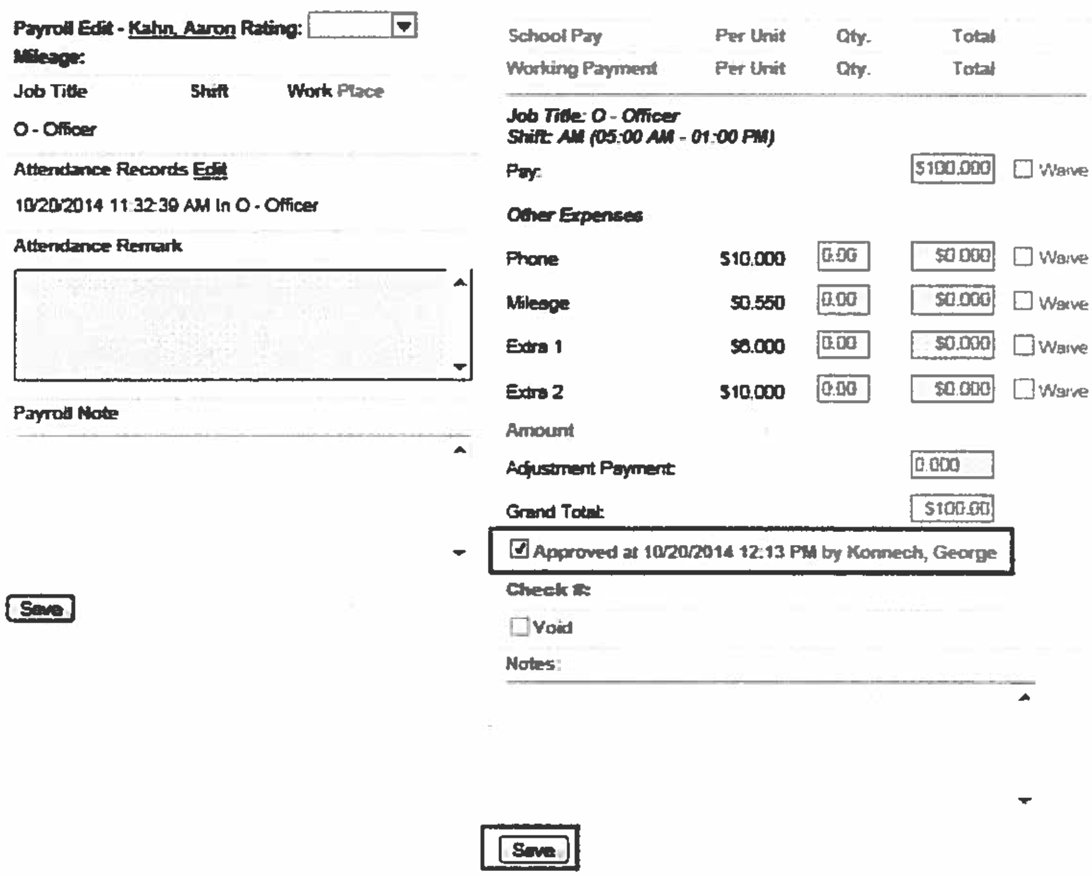
Marking multiple worker payments as approved

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'.



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.



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.

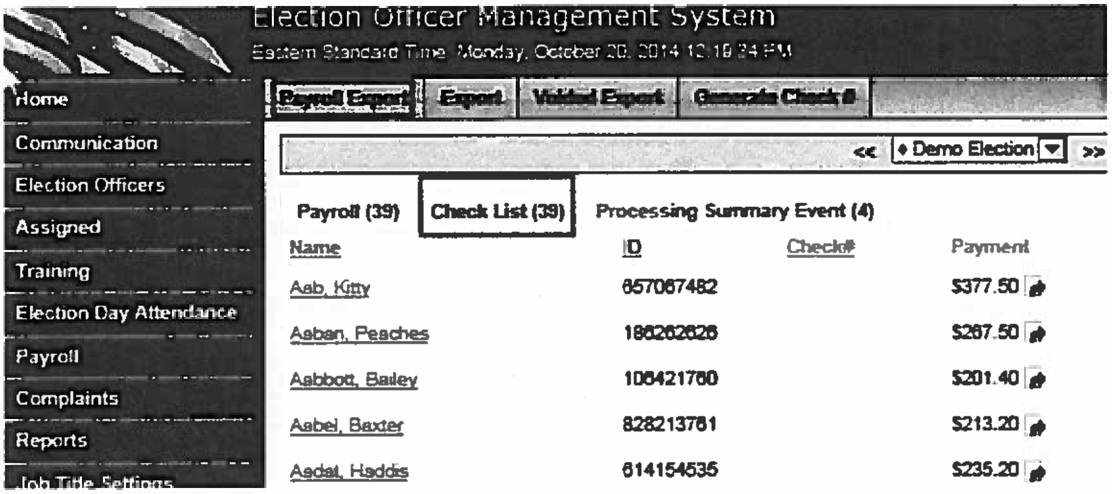
1. In the payroll tab, click the check box next to the worker's name. then click 'Remove'.
   a. If the worker's payment is marked as approved, you'll have to unapproved the payment first.

Producing the payroll export file

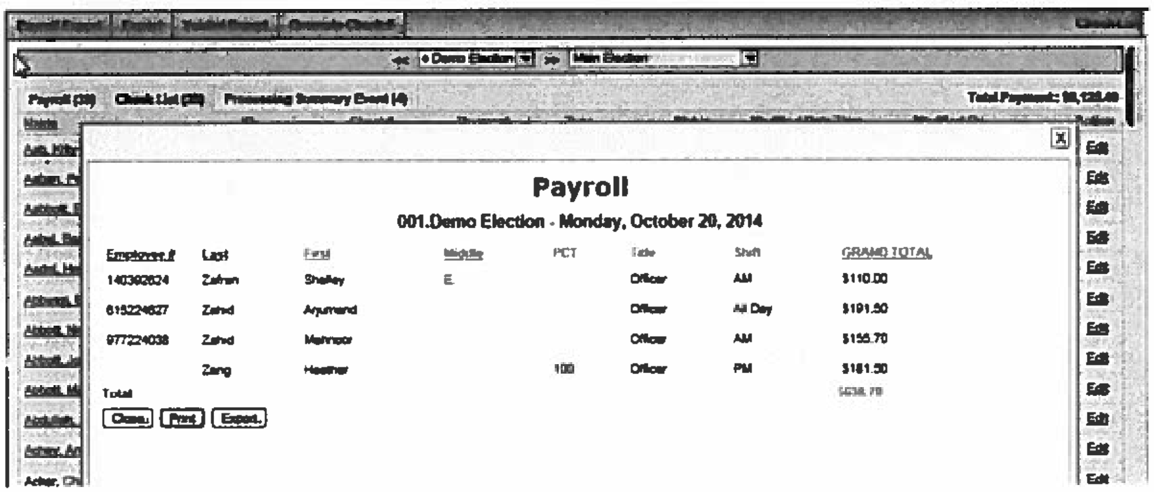
The payroll export is the excel file that gets populated with approved payments. Once the payroll export is populated, it gets documented with a 'PE#' (payroll event number) and it is stored in the database for you to review as needed.

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'.



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



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.