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## Creating a virtual code

Go to Manage /Employee Maintenance – HR/Employee Maintenance/HR tab/Addt Tab

Right click on lollipop

The screenshot shows the HR/Employee Maintenance/HR tab/Addt Tab interface. The 'H/R' tab is selected and highlighted with a red box. The 'Addt' button is also highlighted with a red box. A red arrow points from the text 'Right click on lollipop' to a magnifying glass icon (lollipop) next to the 'Code' field, which contains 'Blank'.

Click ADD and enter a code and description.  
Click SAVE and exit the screen

The screenshot shows the 'Additional Information Definition' dialog box. The 'Code' field is highlighted with a red box and contains 'VIRTUA' and 'Virtual Staff'. The 'Group' field contains 'Blank'. There are several checkboxes for 'Use Date 1', 'Use Date 2', 'Use Text 1', 'Use Text 2', 'Use Logical 1', and 'Use Logical 2', all of which are unchecked. A 'Field Order' list is also visible.

Do a modify and enter the code you created.

The screenshot shows the HR/Employee Maintenance/HR tab/Addt Tab interface. The 'Code' field is highlighted with a red box and contains 'VIRTUA' and 'Virtual Staff'. The 'Group' field contains 'Blank'. The 'Description' field is highlighted with a yellow background and contains 'VIRTUA Virtual Staff'.

## Linking Subs to Employee

(Manage\Employee Attendance\Attendance Transactions)

Before a district can utilize this feature, the RIC has to turn the option on under System Configuration

General Admin A/P Purchasing G/L Service Contracts Misc Billing Budget/Revenue  
Employee/HR Payroll **Attendance** Benefits EE Cost Proj District Tbls Counters BOCES

CutOver Date 07/01/2014

Employee Attendance Rollover Status Rollover Finalized/Open

Treat Absences on Non-Workings Days as an Error instead of a Warning

Allow payroll transactions for Substitute/Dock Wage/Leave Pay entries

Default Substitute transaction types to "Hourly" or "Daily"

Use editable Mass Roll for non-Anniversary date Awards/Grants

1. Search on the employee that is out and enter their time off
2. Click on the SUBSTITUTE TAB
3. Enter the substitute

Absence **Substitute** Dock Wages / Leave Pay Other Employees' Leave

Transaction Type Daily

Employee Social Security Number Last Name First Name Middle  
\*\*\*\*\* BUNNY BUGS M

Emp. No. 00214 BUNNY, BUGS M.

Position Position Code Seq Additional Adj Effective End Date FTE Pay Freq.  
SUBT 1 07/01/2020 to / / 1.0000  
Substitute Teacher Hrs/Day 6.500

Adjustment Code Blank TRS Pay Type Instructional Pay

Account Code and Amount Fund Budget Account Code Budget Type Number of Days Daily Rate Transaction Amount Chk Seq  
A 2110-140-02-INST R 1.000 100.00 100.00 1  
7-12 SUB SALARIES:TEACHER Totals 1.000 100.00

Budget Acct	Description	Hrs/Dys	Amount
A-2110-140-02-INST	7-12 SUB SALARIES:TEACHER	1.000	100.00

Work Period 00/00/0000 - 00/00/0000 Comments

Tax Method Regular

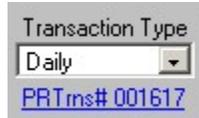
Enter a transaction type by clicking the dropdown arrow. This triggers the creation of pending attendance payroll transactions.

**Work Period** – Start and end dates of the substitutes work days that are to be paid on this transaction and associated with the reported absent employee.

**Number of Days** – Enter the number of days/hours this substitute should be paid for

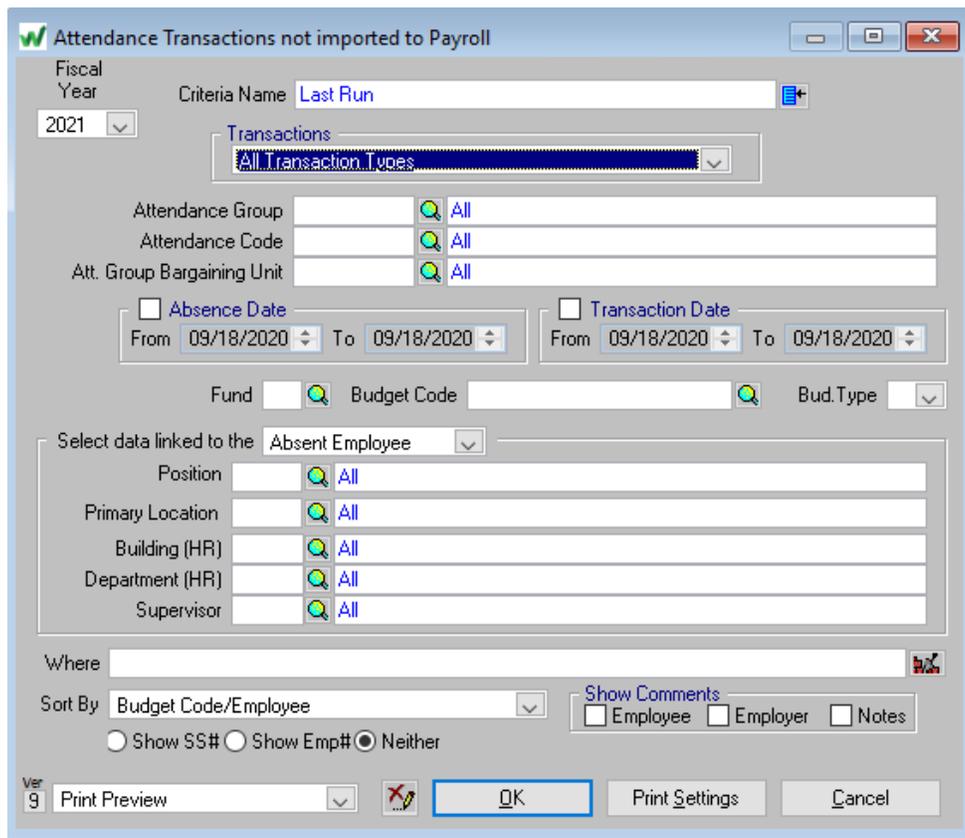
Once the transaction is entered, the payroll clerk will have the ability to verify and also import the file into Payroll where a check will be processed for the substitute.

Modifications to a Substitute transaction are only allowed before it has been imported into payroll as it affects the amount of the paycheck. A Payroll transaction link will appear on the substitute transaction to indicate that the Import to Payroll process has been completed.



Once exported to Payroll, the information can only be modified if the transaction is deleted from the paycheck by the payroll clerk before the check has been posted (receives a check number). Once deleted from the check, it can then be added again as a substitute transaction if necessary, from within attendance.

Before beginning the import process, it is recommended to run the “Attendance Transactions not imported to Payroll” report. This report can be accessed by selecting, *Reports\ Employee Attendance\ Attendance Transactions not Imported into Payroll*.



Fill in the selection criteria as needed. After all transactions have been verified, they can be imported into payroll for processing. This procedure will create an entry on the employee’s paycheck.

## Importing Subs into Payroll

(Manage\ Payroll\ Payroll Transactions\ Post Pending Attendance Payroll Transactions)

The screenshot shows a software dialog box titled "Post Pending Attendance Payroll Transactions to Payroll". At the top, there are fields for "Fiscal Year" (set to 2021) and "Criteria Name" (set to Last Run). Below this is the "Pay Period" field, which is highlighted with a red box and contains the value "006". To its right is a "Post What" dropdown menu set to "All Transaction Types". There are two checkboxes: "Select Transactions from Prior Fiscal Year" (unchecked) and "Process Payments as Payables" (unchecked). A section titled "Optional Record Selection Criteria" contains several search fields: "Attendance Group" and "Attendance Code" (both set to "All"), "Effective Date" (From and To both set to 00/00/0000), and "Transaction Date" (From and To both set to 00/00/0000). Below these are fields for "Fund", "Budget Code", "Budget Type", "Position", "Primary Location", "Building (HR)", "Department (HR)", and "Supervisor", all with search icons and "All" values. At the bottom is a "Where" field. The "OK" button is highlighted.

Select the pay period you want to pay the substitutes in and click OK



## Retrieving Data

### PREREQUISITES

1. You must have purchased Report Writer
2. Work Email needs to be populated on all employees.
3. Phone number needs to be populated on all employees.
4. Primary Location must be populated
5. Need to be using Attendance in system

### PROCESS

1. You need to create 3 crystal reports and take to excel.
  - a. One to identify the virtual staff
  - b. One for listing all active employees
  - c. One for identifying who was out on the day(s) in question
2. Using the Employee Listing report as you main report, do a Vlookup using the other two reports
  - a. Those that come back with an employee number, you would remove from the Grid, leaving you with just those that were in the district.