



Review data for September employees

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Log on to the CYR payroll frequency.

Verify that all applicable data has been updated for all employees with a September contract. Refer to the **Before You Begin** section of this guide to review the **Payroll Verification Items**.

Generate the following Payroll Reports to thoroughly review data prior to running the September payroll:

- [Payroll > Reports > Year to Date Reports > HRS3050 - School Year To Date Report](#)
- [Payroll > Reports > Year To Date Reports > HRS3550 - School YTD Accrual Payroll Account Distr](#)
- [Payroll > Reports > Payroll Information Reports > HRS6000 - Account Code Comparison](#)
- [Payroll > Reports > Payroll Information Reports > HRS6050 - Contract Balance Variance Report](#)
- [Payroll > Reports > Payroll Information Reports > HRS6150 - Employee Payroll Listing](#) OR [Payroll > Reports > HRS900 - User Created Report](#)
- [Payroll > Utilities > Pre-Edit Payroll Data](#)
- Review the following pre-post report from the [Payroll > Payroll Processing > Run Payroll process](#) before running your actual September payroll: [HRS2250 - Deduction Register by Employee](#) - Verify deductions are correct.

If leave was not updated in an earlier step, be sure to update appropriate leave balances now.

[Address leave.](#)

Address leave

[Payroll > Utilities > Mass Update > Leave](#)

Update the employee master leave record balances.

In the current year payroll frequency, generate the [Payroll > Reports > Leave Information Reports > HRS7350 - Leave Status Report](#) for active employees and exclude substitutes. Print and/or save this report and review it for accuracy.

Reports > Leave Information Reports > Leave Status Report Payroll

Preview PDF CSV Clear Options

Leave Information Reports

- [HRS2600 - Employee Substitute Report](#)
- [HRS7000 - Leave Transmittal Report](#)
- [HRS7050 - YTD Leave Transmittal Report](#)
- [HRS7100 - Leave Sequence Audit Trail Report](#)
- [HRS7150 - Detail Leave Sequence Audit Trail Report](#)
- [HRS7200 - Employee Leave Dock Report](#)
- [HRS7250 - YTD Leave Sequence Audit Trail Report](#)
- [HRS7300 - Leave Activity Report](#)
- [HRS7350 - Leave Status Report](#)

HRS7350 - Leave Status Report

Parameter Description	Value
Sort by Alpha (A), Pay Campus (C), Primary Campus (P)	A
Page Break by Employee? (Y/N)	N
Select Leave Type(s), or blank for ALL	
Pay Status Active (A), Inactive (I), or blank for ALL	A
Pay Type 1-4, Exclude Subs (E), or blank for ALL	E
Select Pay Campus(es), or blank for ALL	
Select Primary Campus(es), or blank for ALL	
Select Extract ID(s), or blank for ALL	
Select Employee(s), or blank for ALL	

Use the **Payroll > Utilities > Mass Update > Leave** tab to update employee master leave record balances. This is a three-step process.

Leave type codes are LEA-specific.

1a. This step clears the **Leave Used** and **Leave Earned** fields and rolls the ending balances to the following year beginning balances:

Utilities > Mass Update Payroll

Year: C

Parameters

Pay Status: Active Inactive Both

Pay Type: **E Exclude Substitute**

Job Code: All

Accrual Code: All

Pay Grade:

Prior Yr Emp Date: 00-00-0000

Primary Campus: All

Payoff Date:

Pay Campus: All

Frequency: 6 Monthly CYR

Contract Begin Date:

Salary Concept: All

Contract End Date:

Extract ID:

Contract Months:

Employee Nbr:

Reset

DEDUCTIONS **LEAVE** EMPLOYEE EXTRA DUTY JOB CODE SALARY CALCULATION

Method

Zero Leave Values for Employees

Add Leave Code to Employees

Delete Leave Code from Employees

Increment Leave Earned to Employees

Type	Description	Leave Earned	Leave Used	End Balance
01	INVALID	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
02	LOCAL PR 9	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
03	LOCAL PR 9	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
04	JURY DUTY	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
05	SCH BUS/WO	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
06	INVALID	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
07	STATE PR 9	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
08	STATE PERS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
09	LOCAL/CURR	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Execute

- Under **Pay Status**, select **Active**.
- In the **Pay Type** field, select **E Exclude Substitute**.
- Under **Method**, select **Zero Leave Values for Employees**.
- Under **Leave Earned** and **Leave Used**, select all leave types to be set to zero for the new

school year. Be sure to process both options at the same time to prevent inaccurate balances.

- Do not select **End Balance** unless you want to set the balance to zero for that specific leave type. If this field is not selected, the 2024-2025 ending balances are rolled to the beginning balance fields for the 2025-2026 school year.
- Click **Execute**.
- Review and print the report.

1b. You may have leave codes for which you want to zero the end-of-year balance. For example, Jury Duty, School Business, etc.

The screenshot shows the 'Payroll' section of a 'Mass Update' utility. The 'Parameters' section includes fields for 'Pay Status' (Active, Inactive, Both), 'Pay Type' (E Exclude Substitute), 'Job Code' (All), 'Accrual Code' (All), 'Pay Grade', and 'Prior Yr Emp Date' (00-00-0000). There are also dropdowns for 'Primary Campus', 'Pay Campus', 'Contract Begin Date', 'Contract End Date', and 'Contract Months', along with input fields for 'Payoff Date' and 'Employee Nbr'. A 'Reset' button is located in the top right. Below the parameters, there are tabs for 'DEDUCTIONS', 'LEAVE', 'EMPLOYEE', 'EXTRA DUTY', 'JOB CODE', and 'SALARY CALCULATION'. The 'LEAVE' tab is active, showing a 'Method' section with radio buttons for 'Zero Leave Values for Employees', 'Add Leave Code to Employees', 'Delete Leave Code from Employees', and 'Increment Leave Earned to Employees'. A table below the methods shows leave types with columns for 'Type', 'Description', 'Leave Earned', 'Leave Used', and 'End Balance'. The 'Execute' button is highlighted with a downward arrow.

Type	Description	Leave Earned	Leave Used	End Balance
01	INVALID	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
02	LOCAL PR 9	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
03	LOCAL PR 9	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
04	JURY DUTY	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
05	SCH BUS/WO	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
06	INVALID	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
07	STATE PR 9	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
08	STATE PERS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
09	LOCALICURR	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

- Under **Pay Status**, select **Active**.
- In the **Pay Type** field, select *E Exclude Substitute*.
- Under **Method**, select **Zero Leave Values for Employees**.
- Select **Leave Earned**, **Leave Used**, and **End Balance** for all leave types you want to zero out completely and not carry forward ending balances.
- Click **Execute**.
- Review and print the report.
- If the report is accurate, click **Process** to complete the changes.

2. This step automatically adds leave types to active employees who do not have the leave type assigned on their leave balance record. This step must be completed before leave is mass incremented in step 3.

The screenshot shows the 'Utilities > Mass Update' payroll interface. The 'Parameters' section includes the following fields:

- Pay Status:** Active (selected), Inactive, Both
- Pay Type:** E Exclude Substitute
- Job Code:** All
- Accrual Code:** All
- Pay Grade:** (empty)
- Prior Yr Emp Date:** 00-00-0000

The 'Method' section has the following options:

- Zero Leave Values for Employees
- Add Leave Code to Employees

The 'Add Leave Code' section includes the following fields:

- New Code:** 08 - STATE PERSON
- Begin Balance:** .000
- Leave Earned:** .000
- Leave Used:** .000
- Ending Balance:** .000
- [Update Ending Balance](#)

An 'Execute' button is located on the right side of the interface, with a large downward arrow pointing to it.

- Under **Pay Status**, select **Active**.
- In the **Pay Type** field, select *E Exclude Substitute*.
- Under **Method**, select **Add Leave Code to Employees**.
- In the **New Code** field, select the leave code.
- Do not add balances.
- Click **Execute**.
- Review and print the report. The report only displays the employees who will have the leave code added.
- Repeat this step for each leave type to be added before it is incremented in step 3.

3. This step increments leave earned to employees:

Utilities > Mass Update Payroll

Year: C Frequency: 6

Parameters

Pay Status:
 Active Inactive Both

Pay Type: E Exclude Substitute

Job Code: All

Accrual Code: All

Pay Grade:

Prior Yr Emp Date: 00-00-0000

Primary Campus: All Payoff Date:

Pay Campus: All Frequency: 6 Monthly CYR

Contract Begin Date: Salary Concept: All

Contract End Date: Extract ID:

Contract Months: Employee Nbr:

DEDUCTIONS **LEAVE** EMPLOYEE EXTRA DUTY JOB CODE SALARY CALCULATION

Method

Zero Leave Values for Employees

Add Leave Code to Employees

Delete Leave Code from Employees

Increment Leave Earned to Employees

Type	Description	Leave Earned	Increment
01	INVALID	<input type="checkbox"/>	<input type="text" value="0.000"/>
02	LOCAL PR 9	<input checked="" type="checkbox"/>	<input type="text" value="5.000"/>
03	LOCAL PR 9	<input checked="" type="checkbox"/>	<input type="text" value="5.000"/>
04	JURY DUTY	<input type="checkbox"/>	<input type="text" value="0.000"/>
05	SCH BUS/WO	<input type="checkbox"/>	<input type="text" value="0.000"/>
06	INVALID	<input type="checkbox"/>	<input type="text" value="0.000"/>
07	STATE PR 9	<input checked="" type="checkbox"/>	<input type="text" value="5.000"/>
08	STATE PERS	<input checked="" type="checkbox"/>	<input type="text" value="5.000"/>

Note: If you have a maximum balance designated on the leave type table, this step will not allow the leave balance to exceed the maximum number set on the leave type table.

- Under **Pay Status**, select **Active**.
- In the **Pay Type** field, select *E Exclude Substitute*.
- Under **Method**, select **Increment Leave Earned to Employees**.
- Select **Leave Earned** for the applicable leave types (as defined in your local policy).
- In the **Increment** field, enter the number of days to increment.
- Click **Execute**.
- Review and print the report. The report includes a list of those employees who have reached a maximum of any leave type.
- If the report is accurate, click **Continue**.
- The second report displays the newly incremented leave earned and the new ending balances. Click **Process**.

First ▶ Last

Date Run: Increment Leave Earned for Employees
Cnty Dist: ISD Page: 1 of 7
Frequency: 6

Emp Nbr	Employee Name	Leave Type	Original Earned	New Earned	Original End Bal	New End Bal
000046	AUSSEM, AMY J	08 - STATE PERS	0.000	5.000	68.000	73.000
000096	BENTON, ANTONIO L	07 - STATE PR 9	0.000	5.000	5.000	10.000
000096	BENTON, ANTONIO L	08 - STATE PERS	0.000	5.000	83.000	88.000
000125	BLOUNT, BARBARA A	07 - STATE PR 9	0.000	5.000	6.000	11.000

- Click **OK**.

For new employees, leave balances must be individually updated from their service record information on the [Payroll > Maintenance > Staff Job/Pay Data > Leave Balance](#) tab.

Use the [Payroll > Reports > Leave Information Reports > HRS7350 - Leave Status Report](#) to verify the accuracy of the leave information. Print and/or save this report and review it for accuracy.

[Home](#) Reports > Leave Information Reports > Leave Status Report Payroll

Leave Information Reports
[HRS2600 - Employee Substitute Report](#)
[HRS7000 - Leave Transmittal Report](#)
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HRS7350 - Leave Status Report

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Pay Status Active (A), Inactive (I), or blank for ALL	A
Pay Type 1-4, Exclude Subs (E), or blank for ALL	E
Select Pay Campus(es), or blank for ALL	
Select Primary Campus(es), or blank for ALL	
Select Extract ID(s), or blank for ALL	
Select Employee(s), or blank for ALL	

If necessary, use the [Payroll > Maintenance > Staff Job/Pay Data > Leave Balance](#) tab to make changes to individual employees who are working less than the full school year or less than 100% percent of the day.