New Year Tasks in LINQ HR

1. Hiring Process – Staff Actions with PeopleAdmin and AppliTrack

   The LINQ integration with applicant tracking systems PeopleAdmin and AppliTrack allows export of LINQ data, including positions, and import of hired applicants.
   a. After July 1, roll positions (see information below) and create new 2018 positions for new hires/assignment changes
   b. In PeopleAdmin, export Positions and Employee files on regular schedule using filters for Changed Records.
   c. Refine position titles and subtitles to maximize applicant information in PeopleAdmin site.

2. Roll Positions to create 2018 Fiscal Year Positions

   b. On the Enter Search Criteria screen, choose Source Fiscal Year and Destination Fiscal Year.
   c. Use available filters to target positions to roll:
      • Site
      • Position Type
      • Position Title

   For many districts, it is most efficient to roll positions by site.
d. Choose a site and click **Next**.

e. The Filtered positions will appear on the next screen. You may select individual positions to rollover by clicking the checkbox beside the Position Number, or select all by clicking the checkbox at the header. Click **Next** to continue.

![Image of Position Rollover Utility screen]

f. On the **Confirm Positions to Rollover** screen, confirm the fiscal year and selected positions to make sure they’re correct. Once confirmed, click **Process**, then **OK** at the prompt. The new positions will appear in a new grid:

![Image of Confirm Positions to Rollover screen]

- Positions may be rolled from any fiscal year forward to another fiscal year. It is not necessary to roll positions sequentially through years.
- Positions may also be rolled individually as needed.
3. Substitute Tracking and Reporting

In LINQ HR, substitute reporting can be tailored to the needs of the district.

a. In the Employees menu, choose Substitute Type Setup to set up all substitute types.
b. In the Setup/Admin menu, choose Substitute Area Tree to set up substitute trees with applicable groups and areas for each substitute type. These groups and areas can work with your substitute calling system to better organize substitute tracking and reporting.

c. In the Employees menu, choose the Substitute Profile to enter specific information for each substitute employed by the district. It is not required to enter information in the Substitute Profile, but it can be used in conjunction with the Substitute Tree and Substitute reporting. Check the Active flag to enable this employee in the Substitute Tree.
d. Enter the Substitute Type, Pay Rate, preferred work days and active area list. Choose the appropriate substitute areas for each substitute. The Notes area is available for additional information.

e. In the Employees menu, choose the Substitute Pay Rate Update to enter pay rates for the new fiscal year. Choose the pay rate to update and enter the new rate. All current substitutes with that pay rate in their profile will appear in the grid. Click Save to update the rate.

f. Two substitute reports are available in LINQ HR – for the new year, provide these lists to school treasurers and principals, or give these employees access to these reports in Security.
   - The Substitute Profile report can be filtered by Substitute Type and prints the substitute’s pay rate and work days available.
   - The Substitute by Area report can be filtered by substitute areas or groups from the Substitute Tree. This report prints contact information for the substitute as well as workdays and pay rate.

4. Set Up Employee and Position Local Use Fields

In LINQ HR, Local Use Fields are available to supplement existing information and provide enhanced reporting. Under the Employee or Positions menu, click on Local Use Field Setup to create new fields to be viewed in the Employee or Position record and on the Local Use Fields report.
5. **Update Beginning Teacher Status**

This utility will update the Beginning Teacher Status for all affected employees at the beginning of each school year. In the **Employees** menu item, click on **Beginning Teacher Status Update**.

**IMPORTANT!** The information prompt below will appear to remind you to process the highest status first, followed by each lower status. This will ensure proper advancement of the BT status for each employee.

In this example, two employees with the BT status of 1st Year will be moved to the status of 2nd Year. Check the box beside each employee to be advanced and click **Save**.
A report will be printed to show all changes made by the utility.

<table>
<thead>
<tr>
<th>Date</th>
<th>Time</th>
<th>Name</th>
<th>Old Status</th>
<th>New Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>07/10/2017</td>
<td>6:43 pm</td>
<td>Brooks, Stanley S</td>
<td>1st Year</td>
<td>2nd Year</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Stevens, Debra Lynn</td>
<td>1st Year</td>
<td>2nd Year</td>
</tr>
</tbody>
</table>

6. **Review and Update Security Setup**

As new employees are onboarded or assignments change, it is critical to update the security settings in LINQ System Management to ensure access to the correct information for all new and continuing employees.

- Ensure that new LINQ users are entered into User Setup under the correct User Group.
- Check HR Site access under Assign Sites for each user.
- Communicate with the Finance Security officer on other Security changes needed for new and continuing employees with access changes.