


# ASCENDER - Position Management Process

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# ASCENDER - Position Management Process

The ASCENDER Position Management application integrates employee, payroll, and budget data while tracking position and employee changes.

This management tool allows you to:

- Control active, inactive, occupied, vacant, and proposed positions.
- Track vacant and proposed positions to provide a reliable position count.
- Prevent a new hire from being placed in an occupied position.
- Allow budget calculations and simulations to be performed with varying criteria.
- Automate payroll expense calculations and move them to the payroll and budget systems.
- The primary focus of Position Management is position tracking; therefore, the signed-on payroll frequency is ignored and the year (current or next) is used.

This guide assumes you are familiar with the basic features of the ASCENDER Business system and have reviewed the ASCENDER Business Overview guide.

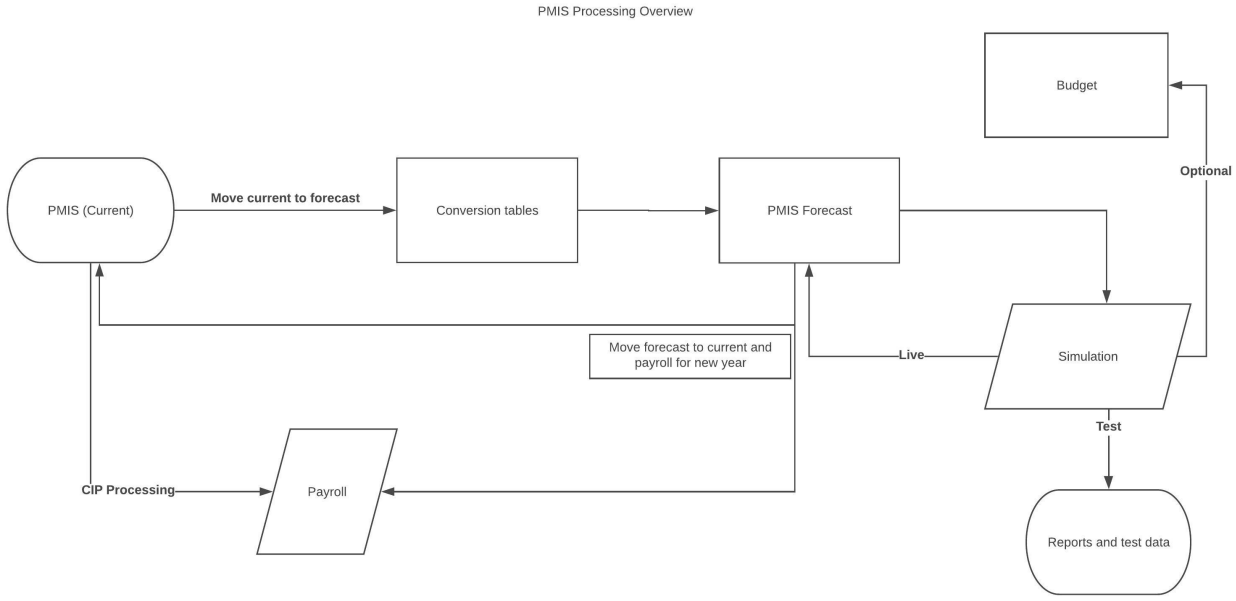
## Before You Begin

Review the following information:

- Position Management Process - Sample Timeline (prints separately)
- Position Records File Layout (prints separately)
- Position Management Terms

| Term | Description |
|---|---|
| **Billet** | The count of the number of jobs within a position number. Alpha characters are allowed; however, it is important to use **only** numeric characters. |
| **CYR** | Refers to the current year. |
| **Forecast** | Refers to the next year records. |
| **NYR** | Refers to the next year. |
| **Occupant** | The individual (employee) who occupies a position at a given time. |
| **PMIS** | Position Management or Position Management Information System (PMIS)is the ASCENDER application that manages various aspects of positions at an LEA. |
| **Position number** | An LEA-defined, 13-character number that identifies a position or group of positions. |
| **Regular position** | Refers to full-time pay type 1, 2, or 3 jobs such as a teacher, clerk, librarian, or bus driver, etc. |
| **Supplemental position** | Refers to an additional position that supplements an employee's salary. Supplemental positions include flat rate stipends and extra days. |

- Position Management Processing Flow Chart




- Position Management Overview

The following information provides an overview of Position Management features and functionality allowing you to better understand the purpose and importance of position numbers as well as the basic management of positions.

## The Framework of a Position

Positions are essentially groupings of various types of employees. Typically, employees are grouped into the following categories: teachers, admins, paraprofessionals, drivers, and cust/maintenance. There are subgroups within these larger groups.

### What is a position number?

A position number is a 13-character number defined and designed by the LEA to efficiently identify the various types of employees in each group and subgroup. The position number is the most important element in Position Management. The position number design depends on the LEA's preference; therefore, there is not a “correct” method for designing position numbers, only a suggested method.

There are two types of positions, regular and supplemental. These positions are referred to as teaching positions, clerk positions, football stipends, or cheer stipends, etc.

The following table provides a suggested method of designing position numbers.

| Position | Description | Example |
|---|---|---|
| 1 | Position type | P - regular position or S - stipend |
| 2 | Pay frequency | 4, 5, 6 |
| 3 | Campus level | E - elementary, M - middle, H - high, A - administration |
| 4-7 | Job group or code | 1100 - Finance employees<br>1210 - Principals<br>1250 - Counselors<br>1300 - Elementary teachers<br>1400 - Secondary teachers<br>6100 - Executives |
| 8 | Blank | |
| 9-13 | LEA-defined, five-digit billet number | 00000 - Vacant<br><br>00001 - Susan Eddington |

If you use the above method to form position numbers, all elementary teachers are grouped in position **P6E1300** and secondary teachers are in either **P6M1400** or **P6H1400** depending on the campus assignment.

If you want to specifically identify positions, you can use the job code in the position number. This makes it easier to retrieve specific data when performing an inquiry. For example, to obtain a list of all elementary art teachers, perform an inquiry on **P6E1301**.

**Sample job code table**

| | | | |
|---|---|---|---|
| 1101 | Accountant | 1301 | Elem Art |
| 1102 | Accounting Assistant | 1302 | Elem Librarian |
| 1103 | Accounting Clerk | 1303 | Elem Library Asst |
| 1104 | Accounting Manager | 1304 | Elem PE |
| 1105 | Accounts Payable Clerk | 1305 | Elem PE Aide |
| 1211 | Elem Principal | 1401 | Sec Art |
| 1212 | Elem Asst Principal | 1402 | Sec Librarian |
| 1213 | MS Principal | 1403 | Sec Librarian Asst |
| 1214 | MS Asst Principal | 1404 | Sec PE |
| 1215 | HS Principal | 1405 | Sec PE Aide |
| 1251 | Elem Counselor | 6101 | Chief Academic Officer |
| 1252 | MS Counselor | 6102 | Chief Bus Officer |
| 1253 | HS Counselor | 6103 | Exec Officer - Schools |

### What is a billet?

A billet is the count of jobs within a position number (group). Billets can be helpful in the following example:

If you have multiple employees in a specific position number (group) (e.g., P6E1300 has 50 elementary school teachers), you can create and include a five-digit billet (job or position) number to uniquely identify each physical position number. In this case, the LEA has 50 elementary school teachers, so you would create billet numbers 00000-00050. Then, assign each billet number to a position number to uniquely identify and assign that position to a specific employee or a vacant status.

It is important that billet 00000 remains vacant as it serves as a position template from which other similar positions can be created. The vacant billet contains only the position information, no occupant information is included.

If you perform an inquiry on position **P6E1300**, a listing similar to the below is displayed.

P6E1300 00000 Vacant
P6E1300 00001 Elementary Teacher
P6E1300 00002 Elementary Teacher
P6E1300 00003 Elementary Teacher

---

## Position Maintenance

Once you have an understanding of how to create and manage positions, begin to add positions to Position Management. For each of the regular and supplemental positions there are three available menu options:

| Page | Description |
|---|---|
| **PMIS Position/Supplement Admin** | Add, modify, and delete positions. The admin pages allow you to manage the creation of positions; therefore, access should only be provided to users who are allowed to create positions. This page is only enabled when logged on to the current year. |
| **PMIS Position/Supplement Modify** | Make changes to existing positions. If you have users who are not allowed to create positions, you can provide access to these pages. |
| **PMIS Position/Supplement History** | Creates a historical record for each change that occurs in the current year Position Management. The Admin/Modify pages display the Position Management information as it currently exists and the History page displays previous information. This page is only enabled when logged on to the current year. |

## Manage Regular Positions

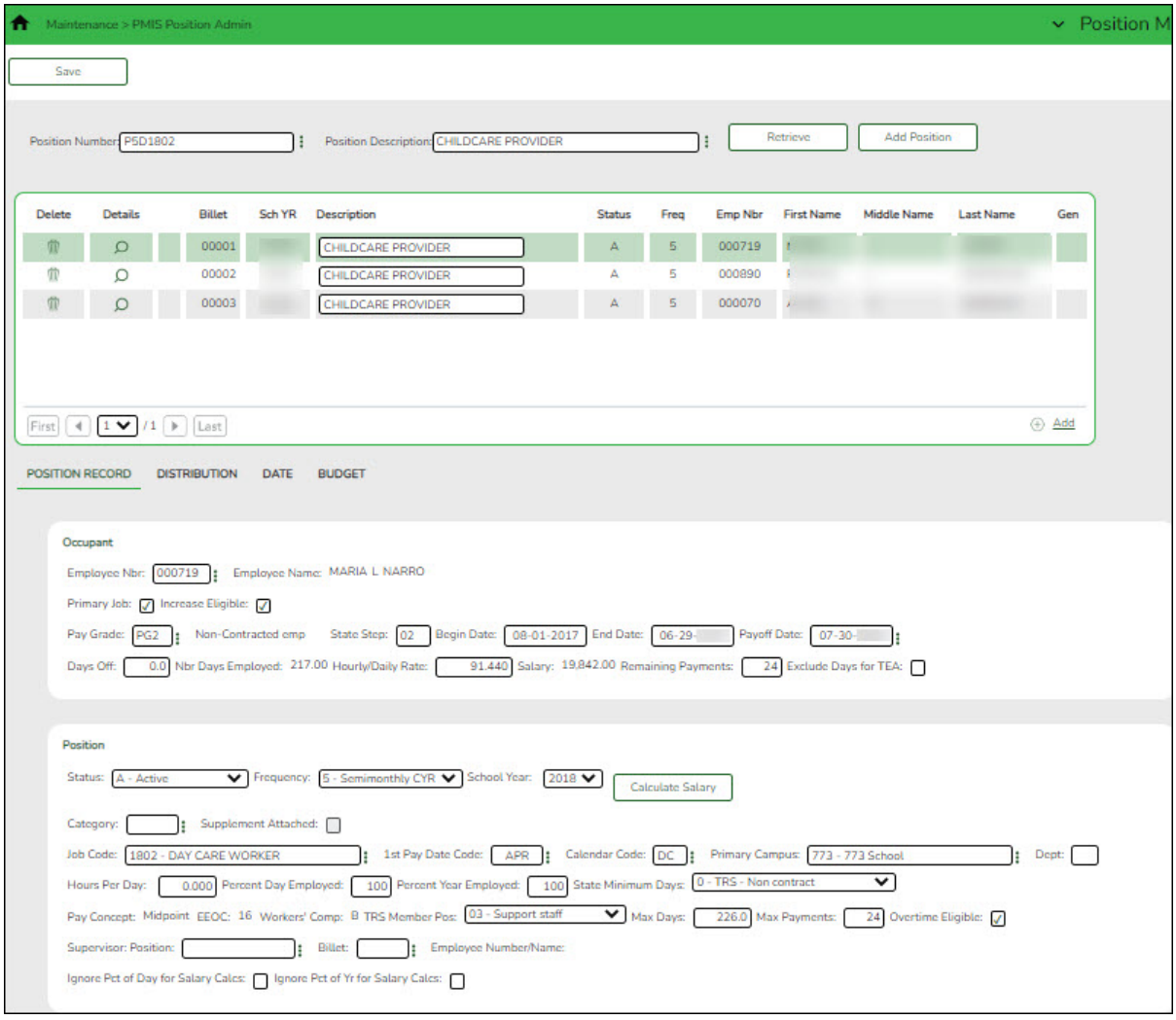
Typically, a “regular” position record refers to full-time pay type 1, 2, or 3 jobs such as a teacher, clerk, librarian, or bus driver, etc. However, this category is not restricted to only full-time positions.

Regular positions are managed on the PMIS Position Admin, PMIS Position Modify, and PMIS Position History pages.

**PMIS Position Admin** - This page is used to create, modify, and delete positions, and is only available when logged on to the current year. Each position contains data on the following tabs:

- Position Management > Maintenance > PMIS Position Admin > Position Record

  This tab is used to establish and maintain a position record for each position at the LEA. If using Position Management, a position record is established for each position by assigning a position number and billet number to the job. Each position should have a default record with a 0000 billet number. A default record allows you to easily create a new position record using the default record data.



## Add or modify a record:

| Field | Description |
|---|---|
| **Position Number** | Begin typing a position number, a drop-down list of corresponding data is displayed. Select a position number from the list. The field can be a maximum of 13 characters. Leading zeros are not required. However, if alphanumeric values are entered, the field is not zero-filled.<br>If the position number is not known, click ⋮. The Positions pop-up window opens with a list of all positions.<br><br>To search for specific positions, type data in one or more of the search fields.<br>Click **Search**. A list of data that matches the search criteria is displayed.<br><br>Select a position number from the list. Otherwise, click **Cancel**. |
| **Position Description** | Begin typing a position description, a drop-down list of corresponding data is displayed. Select a position description from the list.<br>If the position description is not known, click ⋮. The Positions pop-up window opens with a list of all positions.<br><br>To search for specific positions, type data in one or more of the search fields.<br>Click **Search**. A list of data that matches the search criteria is displayed.<br><br>Select a position number from the list. Otherwise, click **Cancel**.<br><br>The position **Description** field in the top grid is only enabled for editing if the **Allow CYR Position Description Changes (Admin only)** field is selected on the District Administration > Options > PMIS District Options page. |

❑ Click **Retrieve**. The associated billet and position information is displayed.

❑ Click **+Add** to add additional billet numbers to the existing position.

❑ Click **Add Position** to add a new position record with a billet number of 00000. After the position record is saved, click **+Add** to begin adding additional billet numbers to the position.

❑ Click 🔍 to display the position detail information for the selected billet.

❑ Under **Occupant**, the occupant (employee) data is displayed. The begin and end dates are validated against the appropriate calendar (current or next and calendar code) to calculate the actual number of days. Complete or update the following fields:

| | |
|---|---|
| **Employee Nbr** | Type the employee number of the employee in the position, or click ⋮ to select from a list. |
| **Employee Name** | Populated based on the selected **Employee Nbr** and is display only. |

| | |
|---|---|
| **Primary Job** | Select if this is the employee's primary job. An employee may only have one primary job. |
| **Increase Eligible** | Select if the employee is eligible to be moved to the next pay step. |
| **Pay Grade** | Type the code for the pay grade, or click ⋮ to select from a list. The field can be a maximum of three characters and is a required field. |
| **State Step** | Type the state step that the employee has earned based on years of service plus career ladder step(s), if applicable. |
| **Begin Date** | Type the beginning date for the selected calendar in the MMDDYYYY format. This is a required field. |
| **End Date** | Type the ending date for the selected calendar in the MMDDYYYY format. This is a required field. |
| **Payoff Date** | Type the date on which the employee's contract is paid off in the MMDDYYYY format, or click ⋮ to select from a list. When this date and the pay date match, contract payoff occurs. This is a required field. |
| **Days Off** | Type the number of days the employee was scheduled to work but did not work. This number is deducted from the actual days. |
| **Nbr Days Employed** | Displays the number of days that the employee is employed by the LEA per year. |
| **Hourly/Daily Rate** | Type the hourly or daily rate for the position. |
| **Salary** | Displays the annual salary amount for the pay grade, pay step, maximum days, and local schedule. |
| **Remaining Payments** | Type the number of remaining payments to be made to the employee during the current contract period. This is a required field. |
| **Exclude Days for TEA** | Select to exclude the number of days employed (for the selected job) from TEA reporting. For example, this field would be used for an employee who performs two separate jobs on the same day. |

❑ Under **Position**, the position data remains the same regardless of the occupant. Typically, position data changes only occur annually. Complete or update the following fields:

| | |
|---|---|
| **Status** | Click ⌄ to select a position status.<br><br>*A - Active* - The position is occupied.<br><br>*H - Position on Hold* - The position is vacant and is not included in the budget.<br><br>*I - Inactive* - The position is vacant and is not included in the budget.<br><br>*P - Proposed* - The position is vacant, never filled, and may become a vacant or active position. A proposed position can be included in the budget if needed.<br><br>*V - Vacant* - The position is vacant and is included in the budget. |
| **Frequency** | Click ⌄ to select a payroll frequency. This is a required field. |

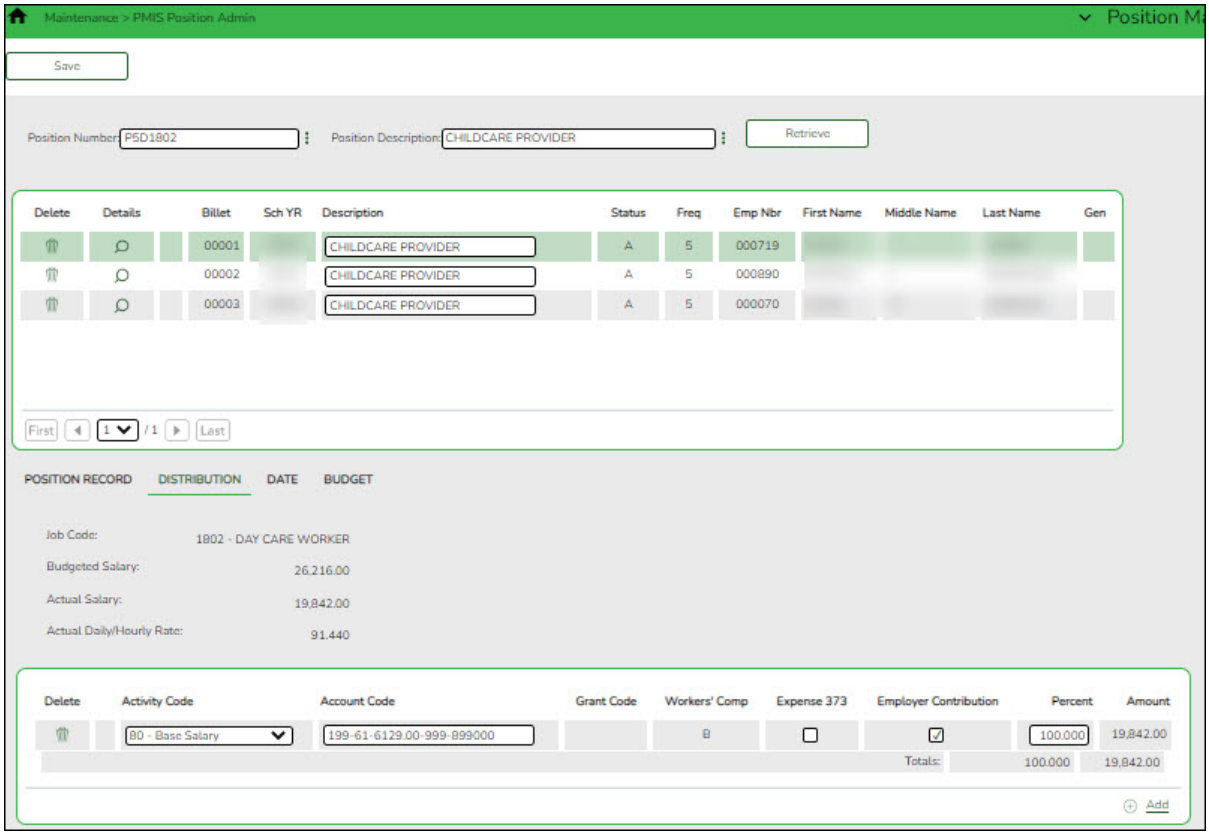
| | |
|---|---|
| **School Year** | Type the school year in the YYYY format. This is a required field.<br><br>If the year is the same as the **Current Year** on the District Administration > Options > Position Management page, the current year salary, first pay date codes, and job code are used for validation. |
| **Category** | Type the code used to categorize positions, or click to select a code from the Category Code list. The field can be a maximum of five characters. |
| **Supplement Attached** | Select if there is a supplement position record tied to this position. |
| **Job Code** | Type a job code to identify the job, or click to select a code from the Job Codes list. The field can be a maximum of four characters (e.g., 0001 = Superintendent, 1003 = 10 month - 3rd Grade Teacher). This is a required field. |
| **1st Pay Date Code** | Type a first pay date code, or click to select the code designating the first pay date for the position. This is a required field. |
| **Calendar Code** | Type a calendar code, or click to select the calendar code for the position. This is a required field. |
| **Primary Campus** | Type the primary campus code, or click to select a primary campus. This is a required field. |
| **Dept** | Type the code used to categorize the department associated with the position. The field can be a single digit. |
| **Hours Per Day** | Type the number of hours per day an employee works. This data is used for the positions with salaries based on an hourly rate. |
| **Percent Day Employed** | Type the number that represents the total percent of the day that the position works.<br><br>For example, if the position works only 50% of the day, enter 50. |
| **Percent Year Employed** | Type the number that represents the total percent of the year that the position works.<br><br>For example, if a position works every other day (50%) or 4 days out of the week (80%). This field is used to reduce the actual days worked which, in turn, reduces the calculated salary. |
| **State Minimum Days** | Click to select the minimum number of state days required for the position. |
| **Pay Concept** | Displays the method used to calculate the employee's pay. |
| **EEOC** | Displays any notation related to the Equal Employment Opportunity Commission. |
| **Workers' Comp** | Displays the type of workers' compensation insurance used for the account. |
| **TRS Member Pos** | Click to select the employee's TRS classification. This is a required field. |
| **Max Days** | Type the maximum number of days that the position is eligible to work. This number is used when calculating the annual pay based on a daily rate, and when calculating the annual salary using the annual salary table. This is a required field. |
| **Max Payments** | Type the maximum number of payments allowed. This is a required field. |

| | |
|---|---|
| **Overtime Eligible** | Select if the position is eligible to receive overtime pay. |
| **Supervisor Position** | Begin typing a position number, a drop-down list of corresponding data is displayed. Select a position number from the list. The field can be a maximum of 13 characters. Leading zeros are not required. However, if alphanumeric values are entered, the field is not zero-filled.<br><br>If the position number is not known, click ⋮. The Positions pop-up window is displayed with a list of all positions.<br><br>To search for specific positions, type data in one or more of the search fields.<br>Click **Search**. A list of data that matches the search criteria is displayed.<br>Select a position number item from the list. Otherwise, click **Cancel**. |
| **Billet** | Type the billet number of the supervisor, or click ⋮ to select a billet for the position. The field can be a maximum of five numeric characters. |
| **Employee Number/Name** | Displays the employee number and name. |
| **Ignore Pct of Day for Salary Calcs** | Select to ignore the percent of day and allow full salary amounts to be calculated even if the percent of day value does not equal 100%.<br><br>This field is only displayed if the **Display Options to Ignore Pct of Day** and **Pct of Year for Position Records** field is selected on the District Administration > Options > Position Management page. |
| **Ignore Pct of Yr for Salary Calcs** | Select to ignore the percent of year and allow full salary amounts to be calculated even if the percent of year value does not equal 100%.<br><br>This field is only displayed if the **Display Options to Ignore Pct of Day** and **Pct of Year for Position Records** field is selected on the District Administration > Options > Position Management page. |

❑ Click **Save**.

◦ Position Management > Maintenance > PMIS Position Admin > Distribution

This tab provides a list of the accounts used to fund the positions. This tab only allows you to enter percentages. Any Position Management change prompts a salary calculation which is then distributed using the percentages. The distribution functions like the next year salary calculations.




## Add or modify a record:

| Field | Description |
|---|---|
| **Position Number** | Begin typing a position number, a drop-down list of corresponding data is displayed. Select a position number from the list. The field can be a maximum of 13 characters. Leading zeros are not required. However, if alphanumeric values are entered, the field is not zero-filled.<br>If the position number is not known, click ⋮. The Positions pop-up window opens with a list of all positions.<br><br>To search for specific positions, type data in one or more of the search fields.<br>Click **Search**. A list of data that matches the search criteria is displayed.<br><br>Select a position number from the list. Otherwise, click **Cancel**. |

| Field | Description |
|---|---|
| **Position Description** | Begin typing a position description, a drop-down list of corresponding data is displayed. Select a position description from the list.<br>If the position description is not known, click . The Positions pop-up window opens with a list of all positions.<br><br>To search for specific positions, type data in one or more of the search fields.<br>Click **Search**. A list of data that matches the search criteria is displayed.<br><br>Select a position number from the list. Otherwise, click **Cancel**.<br><br>The position **Description** field in the top grid is only enabled for editing if the **Allow CYR Position Description Changes (Admin only)** field is selected on the District Administration > Options > PMIS District Options page. |

❑ Click **Retrieve**. The associated billet information is displayed.

❑ Click to display the position detail information for the selected position. The following fields are display only:

- **Job Code**
- **Budgeted Salary**
- **Actual Salary**
- **Actual Daily/Hourly Rate**

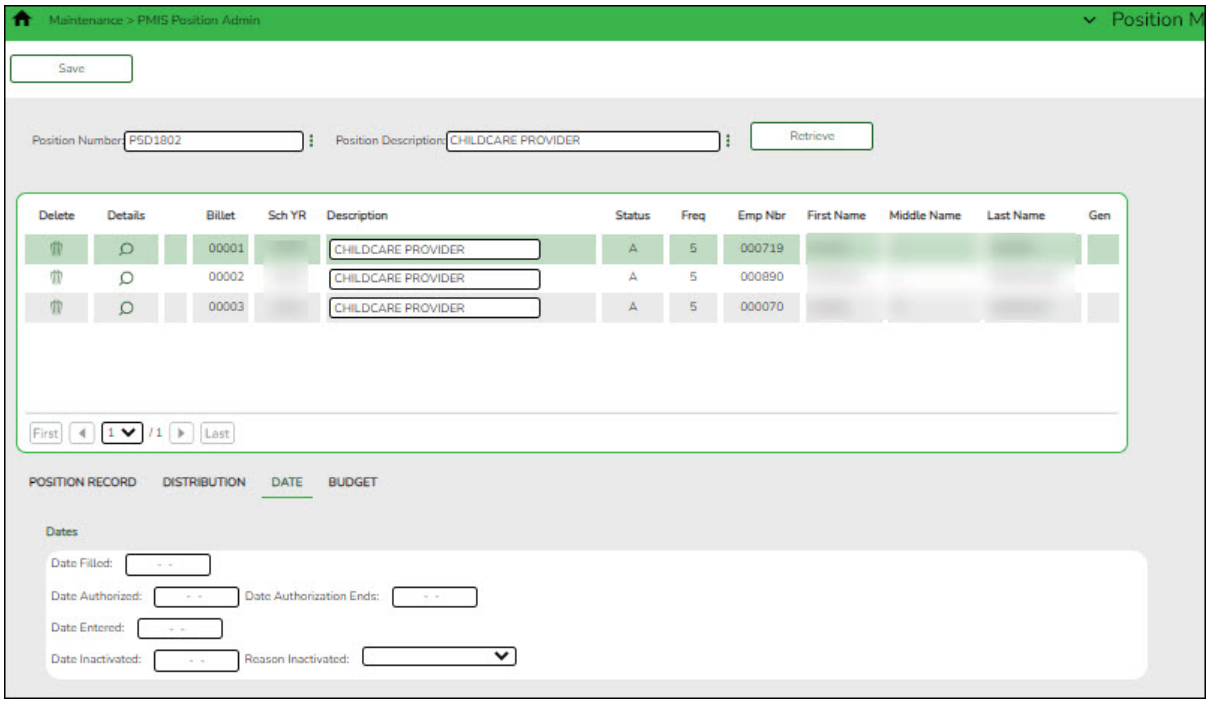
❑ Click **+Add** to add a row.

| | |
|---|---|
| **Activity Code** | Click to select an activity code. |
| **Account Code** | Type the account code. As you type the data, a drop-down list of corresponding data is displayed. Select an account code from the list. |
| **Grant Code** | Displays the grant code. |
| **Workers' Comp** | Displays workers' comp code. |
| **Expense 373** | Select to include the distribution amount in the above state base (ASB) distribution for TRS. If not selected, the amount is not used for distribution of the ASB amount on the TRS 373 Report. |
| **Employer Contribution** | Select if the distribution should be included as an employer insurance contribution. The field is only available when account type G is selected. |
| **Percent** | Type the distribution percentage. |
| **Amount** | Displays the distribution amount. |

❑ Click **Save**.

◦ Position Management > Maintenance > PMIS Position Admin > Date

This tab is used to create, modify, or delete dates related to a position record.




## Add or modify a record:

| Field | Description |
|---|---|
| **Position Number** | Begin typing a position number, a drop-down list of corresponding data is displayed. Select a position number from the list. The field can be a maximum of 13 characters. Leading zeros are not required. However, if alphanumeric values are entered, the field is not zero-filled.<br>If the position number is not known, click ⋮. The Positions pop-up window opens with a list of all positions.<br><br>To search for specific positions, type data in one or more of the search fields.<br>Click **Search**. A list of data that matches the search criteria is displayed.<br><br>Select a position number from the list. Otherwise, click **Cancel**. |
| **Position Description** | Begin typing a position description, a drop-down list of corresponding data is displayed. Select a position description from the list.<br>If the position description is not known, click ⋮. The Positions pop-up window opens with a list of all positions.<br><br>To search for specific positions, type data in one or more of the search fields.<br>Click **Search**. A list of data that matches the search criteria is displayed.<br><br>Select a position number from the list. Otherwise, click **Cancel**.<br><br>The position **Description** field in the top grid is only enabled for editing if the **Allow CYR Position Description Changes (Admin only)** field is selected on the District Administration > Options > PMIS District Options page. |

❑ Click **Retrieve**. The associated billet information is displayed.

❑ Click to display the position detail information for the selected position.

Under **Dates**:

| | |
|---|---|
| **Date Filled** | Populated with the date the position was filled, or you can type a date in MMDDYYYY format. For a new position, the field is automatically populated with the current date. |
| **Date Authorized** | Populated with the date the position was authorized, or you can type a date in MMDDYYYY format. For a new position, the field is automatically populated with the current date. |
| **Date Authorization Ends** | Populated with the date the position authorization ends, or you can type a date in MMDDYYYY format. |
| **Date Entered** | Populated with the date the position was entered in the system, or you can type a date in MMDDYYYY format. For a new position, the field is automatically populated with the current date. |
| **Date Inactivated** | Populated with the date the position was inactivated, or you can type a date in MMDDYYYY format. |
| **Reason Inactivated** | Click to select the reason the position was inactivated. |

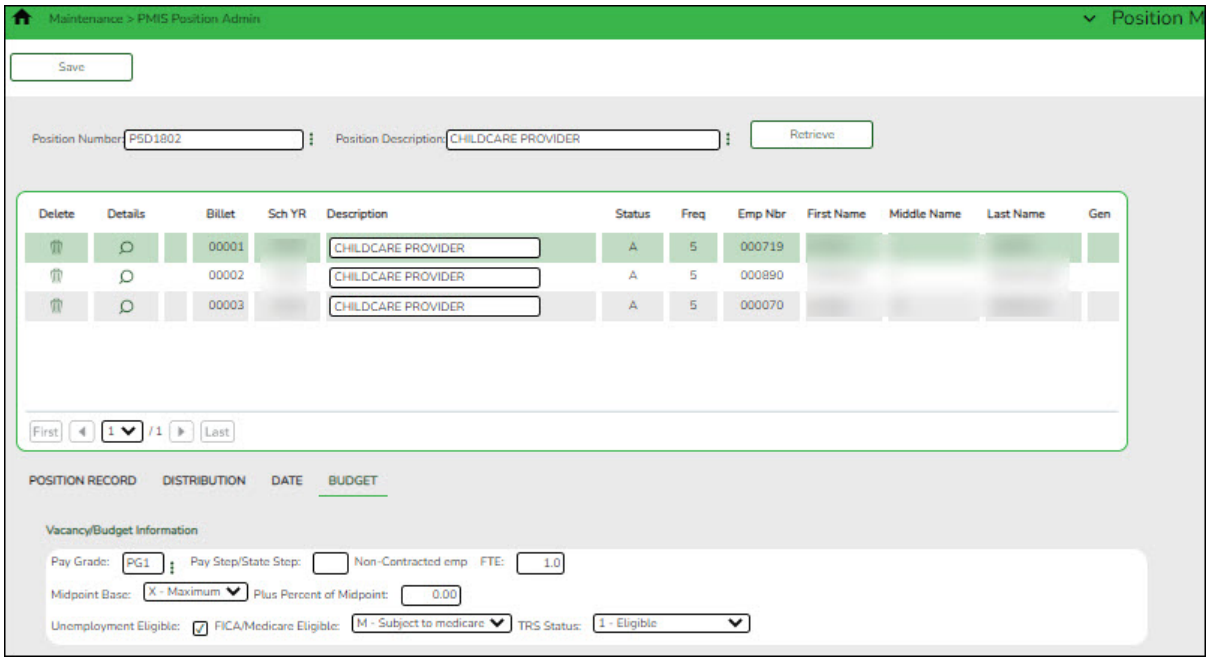
❑ Click **Save**.

◦ Position Management > Maintenance > PMIS Position Admin > Budget

This tab is used to create, modify, or delete budget data related to a position record. It allows you to set a base salary for which to budget when a position is vacant and sets default information for new hires.

- If the position is vacant, the budget values are used to calculate the budget requirements for the position.
- If the position is for a new employee, the budget values are populated to the new employee's payroll records (e.g., job information and pay information).
- If the position is for an existing employee, the budget values are not used.

In addition, this tab is used to indicate unemployment eligibility, FICA/Medicare status, and TRS status data for new employees.




## Add or modify a record:

| Field | Description |
|---|---|
| **Position Number** | Begin typing a position number, a drop-down list of corresponding data is displayed. Select a position number from the list. The field can be a maximum of 13 characters. Leading zeros are not required. However, if alphanumeric values are entered, the field is not zero-filled.<br>If the position number is not known, click ⋮. The Positions pop-up window opens with a list of all positions.<br><br>To search for specific positions, type data in one or more of the search fields.<br>Click **Search**. A list of data that matches the search criteria is displayed.<br><br>Select a position number from the list. Otherwise, click **Cancel**. |
| **Position Description** | Begin typing a position description, a drop-down list of corresponding data is displayed. Select a position description from the list.<br>If the position description is not known, click ⋮. The Positions pop-up window opens with a list of all positions.<br><br>To search for specific positions, type data in one or more of the search fields.<br>Click **Search**. A list of data that matches the search criteria is displayed.<br><br>Select a position number from the list. Otherwise, click **Cancel**.<br><br>The position **Description** field in the top grid is only enabled for editing if the **Allow CYR Position Description Changes (Admin only)** field is selected on the District Administration > Options > PMIS District Options page. |

❑ Click **Retrieve**. The associated billet information is displayed.

❑ Click to display the position detail information for the selected position.

❑ Under **Vacancy/Budget Information**:

| | |
|---|---|
| **Pay Grade** | Type the three-character code for the pay grade, or click to select a pay grade from the list. |
| **Pay Step** | Type the two-character code for the salary level within the indicated pay grade, or click to select a pay step from the list. |
| **Schedule** | This field is used for positions tied to an annual table. Type the optional, locally assigned, single-character code that is used to indicate the separate pay schedules for professional and support staff with the same pay grade, pay step, and the maximum number of days employed, or click to select a schedule from the list. |
| **FTE** | Type the full-time equivalent amount used to calculate salaries in payroll. |
| **Midpoint Base** | Click to select the midpoint base.<br><br>*D - Midpoint*<br>*N - Minimum*<br>*X - Maximum* |
| **Plus Percent of Midpoint** | |
| **Unemployment Eligible** | Select if the position is to have unemployment taxes calculated as part of the budgeting process. |
| **FICA/Medicare Eligible** | Click to select the FICA/Medicare eligibility for the position. |
| **TRS Status** | Click to select the TRS eligibility status for the position. |

❑ Click **Save**.

**PMIS Position Modify** - This page is used to modify existing positions. If there are LEA employees who require restricted access (e.g., employees who should not create positions), provide those users with permission to this page. Each position contains data on the following tabs:

- Position Management > Maintenance > PMIS Position Modify > Position Record

  This tab is used to maintain the position record for each position in the school district.

### Add or modify a record:

| Field | Description |
|---|---|
| **Position Number** | Begin typing a position number, a drop-down list of corresponding data is displayed. Select a position number from the list. The field can be a maximum of 13 characters. Leading zeros are not required. However, if alphanumeric values are entered, the field is not zero-filled.<br>If the position number is not known, click ⋮. The Positions pop-up window opens with a list of all positions.<br><br>To search for specific positions, type data in one or more of the search fields.<br>Click **Search**. A list of data that matches the search criteria is displayed.<br><br>Select a position number from the list. Otherwise, click **Cancel**. |
| **Position Description** | Begin typing a position description, a drop-down list of corresponding data is displayed. Select a position description from the list.<br>If the position description is not known, click ⋮. The Positions pop-up window opens with a list of all positions.<br><br>To search for specific positions, type data in one or more of the search fields.<br>Click **Search**. A list of data that matches the search criteria is displayed.<br><br>Select a position number from the list. Otherwise, click **Cancel**.<br><br>The position **Description** field in the top grid is only enabled for editing if the **Allow CYR Position Description Changes (Admin only)** field is selected on the District Administration > Options > PMIS District Options page. |

❑ Click **Retrieve**. The associated billet information is displayed.

The following fields are display only:

- **Billet**
- **Sch YR**
- **Description**
- **Status**
- **Freq**
- **Emp Nbr**
- **First Name**
- **Middle Name**
- **Last Name**
- **Gen**

❑ Click 🔍 to display the position detail information for the selected position.

❑ Under **Occupant**:

| | |
|---|---|
| **Employee Nbr** | Type the employee number of the employee in the position, or click ⋮ to select from a list. |

| | |
|---|---|
| **Employee Name** | Populated based on the selected **Employee Nbr** and is display only. |
| **Primary Job** | Select if this is the employee's primary job. An employee may only have one primary job. |
| **Increase Eligible** | Select if the employee is eligible to be moved to the next pay step. |
| **New Employee** | Select to indicate a new employee record. This field is only displayed on forecast position records. If selected, the salary simulations will budget the employer contribution for new employees even though they do not have current year payroll records.<br><br>**Notes**:<br><br>This field is not displayed on supplemental position records.<br><br>If the position is changed to any status other than **Active**, the field is disabled. |
| **Pay Grade** | Type the code for the pay grade, or click ⋮ to select from a list. The field can be a maximum of three characters and is a required field. |
| **State Step** | Type the state step that the employee has earned based on years of service plus career ladder step(s), if applicable. |
| **Begin Date** | Type the beginning date for the selected calendar in the MMDDYYYY format. This is a required field. |
| **End Date** | Type the ending date for the selected calendar in the MMDDYYYY format. This is a required field. |
| **Payoff Date** | Type the date on which the employee's contract is paid off in the MMDDYYYY format, or click ⋮ to select from a list. When this date and the pay date match, contract payoff occurs. This is a required field. |
| **Days Off** | Type the number of days the employee was scheduled to work but did not work. This number is deducted from the actual days. |
| **Nbr Days Employed** | Type the number of days that the employee is employed by the LEA per year. |
| **Hourly/Daily Rate** | Type the hourly or daily rate for the position. |
| **Salary** | Displays the annual salary amount for the pay grade, pay step, maximum days, and local schedule. |
| **Remaining Payments** | Type the number of remaining payments to be made to the employee during the current contract period. This is a required field. |
| **Exclude Days for TEA** | Select to exclude the number of days employed (for the selected job) from TEA reporting. For example, this field would be used for an employee who performs two separate jobs on the same day. |

❑ Under **Position**:

| | |
|---|---|
| **Accept Changes** | Select to indicate that any changes made in the current year will be reflected in the next year. Any changes made in forecast do not reflect in the current year regardless of the field selection. |

| | |
|---|---|
| **Status** | Click to select a position status.<br><br>*A - Active* - The position is occupied.<br><br>*H - Position on Hold* - The position is vacant and is not included in the budget.<br><br>*I - Inactive* - The position is vacant and is not included in the budget.<br><br>*P - Proposed* - The position is vacant, never filled, and may become a vacant or active position. A proposed position can be included in the budget if needed.<br><br>*V - Vacant* - The position is vacant and is included in the budget. |
| **Frequency** | Click to select a payroll frequency. This is a required field. |
| **School Year** | Type the school year in the YYYY format. This is a required field.<br><br>If the year is the same as the **Current Year** on the District Administration > Options > Position Management page, the current year salary, first pay date codes, and job code are used for validation. |
| **Category** | Type the code used to categorize positions, or click to select a code from the Category Code list. The field can be a maximum of five characters. |
| **Supplement Attached** | Select if there is a supplement position record tied to this position. |
| **Job Code** | Type a job code to identify the job, or click to select a code from the Job Codes list. The field can be a maximum of four characters (e.g., 0001 = Superintendent, 1003 = 10 month - 3rd Grade Teacher). This is a required field. |
| **1st Pay Date Code** | Type a first pay date code, or click to select the code designating the first pay date for the position. This is a required field. |
| **Calendar Code** | Type a calendar code, or click to select the calendar code for the position. This is a required field. |
| **Primary Campus** | Type the primary campus code, or click to select a primary campus. This is a required field. |
| **Dept** | Type the code used to categorize the department associated with the position. The field can be a single digit. |
| **Hours Per Day** | Type the number of hours per day an employee works. This data is used for the positions with salaries based on an hourly rate. |
| **Percent Day Employed** | Type the number that represents the total percent of the day that the position works.<br><br>For example, if the position works only 50% of the day, enter 50. |
| **Percent Year Employed** | Type the number that represents the total percent of the year that the position works.<br><br>For example, if a position works every other day (50%) or 4 days out of the week (80%). This field used to reduce the actual days worked which, in turn, reduces the calculated salary. |

| | |
|---|---|
| **State Minimum Days** | Click to select the minimum number of state days required for the position. |
| **Pay Concept** | Displays the method used to calculate the employee's pay. |
| **EEOC** | Displays any notation related to the Equal Employment Opportunity Commission. |
| **Workers' Comp** | Displays the type of workers' compensation insurance used for the account. |
| **TRS Member Pos** | Click to select the employee's TRS classification. This is a required field. |
| **Max Days** | Type the maximum number of days that the position is eligible to work. This number is used when calculating the annual pay based on a daily rate. It is also used when calculating the annual salary using the annual salary table. This is a required field. |
| **Max Payments** | Type the maximum number of payments allowed. This is a required field. |
| **Overtime Eligible** | Select if the position is eligible to receive overtime pay. |
| **Supervisor Position** | Begin typing a position number, a drop-down list of corresponding data is displayed. Select a position number from the list. The field can be a maximum of 13 characters. Leading zeros are not required. However, if alphanumeric values are entered, the field is not zero-filled.<br><br>If the position number is not known, click . The Positions pop-up window opens with a list of all positions.<br><br>To search for specific positions, type data in one or more of the search fields.<br>Click **Search**. A list of data that matches the search criteria is displayed.<br>Select a position number item from the list. Otherwise, click **Cancel**. |
| **Billet** | Type the billet number of the supervisor, or click to select a billet for the position. The field can be a maximum of five characters. |
| **Employee Number/Name** | Displays the employee number and name. |
| **Ignore Pct of Day for Salary Calcs** | Select to ignore the percent of day and allow full salary amounts to be calculated even if the percent of day value does not equal 100%.<br><br>This field is only displayed if the **Display Options to Ignore Pct of Day** and **Pct of Year for Position Records** field is selected on the District Administration > Options > Position Management page. |
| **Ignore Pct of Yr for Salary Calcs** | Select to ignore the percent of year and allow full salary amounts to be calculated even if the percent of year value does not equal 100%.<br><br>This field is only displayed if the **Display Options to Ignore Pct of Day** and **Pct of Year for Position Records** field is selected on the District Administration > Options > Position Management page. |

❑ Click **Calculate Salary** to complete the salary calculation.

❑ Click **Save**.

◦ Position Management > Maintenance > PMIS Position Modify > Distribution

This tab provides a list of the accounts used to fund the positions.

### Add or modify a record:

| Field | Description |
|---|---|
| **Position Number** | Begin typing a position number, a drop-down list of corresponding data is displayed. Select a position number from the list. The field can be a maximum of 13 characters. Leading zeros are not required. However, if alphanumeric values are entered, the field is not zero-filled.<br>If the position number is not known, click ⋮. The Positions pop-up window opens with a list of all positions.<br><br>To search for specific positions, type data in one or more of the search fields.<br>Click **Search**. A list of data that matches the search criteria is displayed.<br><br>Select a position number from the list. Otherwise, click **Cancel**. |
| **Position Description** | Begin typing a position description, a drop-down list of corresponding data is displayed. Select a position description from the list.<br>If the position description is not known, click ⋮. The Positions pop-up window opens with a list of all positions.<br><br>To search for specific positions, type data in one or more of the search fields.<br>Click **Search**. A list of data that matches the search criteria is displayed.<br><br>Select a position number from the list. Otherwise, click **Cancel**.<br><br>The position **Description** field in the top grid is only enabled for editing if the **Allow CYR Position Description Changes (Admin only)** field is selected on the District Administration > Options > PMIS District Options page. |

❑ Click **Retrieve**. The associated billet information is displayed.

❑ Click 🔍 to display the position detail information for the selected position. The following fields are display only:

**Job Code**
**Budgeted Salary**

**Actual Salary**
**Actual Daily/Hourly Rate**

❑ Click **+Add** to add a row.

| | |
|---|---|
| **Activity Code** | Click ⌄ to select an activity code. |
| **Account Code** | Type the account code. As you type the data, a drop-down list of corresponding data is displayed. Select an account code from the list. |
| **Grant Code** | Displays the grant code. |
| **Workers' Comp** | Displays workers' comp code. |
| **Expense 373** | Select to include the distribution amount in the above state base (ASB) distribution for TRS. If not selected, the amount is not used for distribution of the ASB amount on the TRS 373 Report. |
| **Employer Contribution** | Select if the distribution should be included as an employer insurance contribution. The field is only available when account type G is selected. |
| **Percent** | Type the distribution percentage. |
| **Amount** | Displays the distribution amount. |

❑ Click **Save**.

◦ Position Management > Maintenance > PMIS Position Modify > Date

This tab is used to create, modify, or delete dates relating to a position record.

## Add or modify a record:

| Field | Description |
|---|---|
| **Position Number** | Begin typing a position number, a drop-down list of corresponding data is displayed. Select a position number from the list. The field can be a maximum of 13 characters. Leading zeros are not required. However, if alphanumeric values are entered, the field is not zero-filled.<br>If the position number is not known, click ⋮. The Positions pop-up window opens with a list of all positions.<br><br>To search for specific positions, type data in one or more of the search fields.<br>Click **Search**. A list of data that matches the search criteria is displayed.<br><br>Select a position number from the list. Otherwise, click **Cancel**. |

| Field | Description |
|---|---|
| **Position Description** | Begin typing a position description, a drop-down list of corresponding data is displayed. Select a position description from the list.<br>If the position description is not known, click . The Positions pop-up window opens with a list of all positions.<br><br>To search for specific positions, type data in one or more of the search fields.<br>Click **Search**. A list of data that matches the search criteria is displayed.<br><br>Select a position number from the list. Otherwise, click **Cancel**.<br><br>The position **Description** field in the top grid is only enabled for editing if the **Allow CYR Position Description Changes (Admin only)** field is selected on the District Administration > Options > PMIS District Options page. |

❑ Click **Retrieve**. The associated billet information is displayed.

❑ Click to display the position detail information for the selected position.

❑ Under **Dates**:

| | |
|---|---|
| **Date Filled** | Populated with the date the position was filled, or you can type a date in MMDDYYYY format. For a new position, the field is automatically populated with the current date. |
| **Date Authorized** | Populated with the date the position was authorized, or you can type a date in MMDDYYYY format. For a new position, the field is automatically populated with the current date. |
| **Date Authorization Ends** | Populated with the date the position authorization ends, or you can type a date in MMDDYYYY format. |
| **Date Entered** | Populated with the date the position was entered in the system, or you can type a date in MMDDYYYY format. For a new position, the field is automatically populated with the current date. |
| **Date Inactivated** | Populated with the date the position was inactivated, or you can type a date in MMDDYYYY format. |
| **Reason Inactivated** | Click to select the reason the position was inactivated. |

❑ Click **Save**.

◦ Position Management > Maintenance > PMIS Position Modify > Budget

This tab is used to create, modify, or delete budget data related to a position record.

- If the position is vacant, the budget values are used to calculate the budget requirements for the position.
- If the position is for a new employee, the budget values are populated to the new employee's payroll records (e.g., job information, pay information).
- If the position is for an existing employee, the budget values are not used.

## Add or modify a record:

| Field | Description |
|---|---|
| **Position Number** | Begin typing a position number, a drop-down list of corresponding data is displayed. Select a position number from the list. The field can be a maximum of 13 characters. Leading zeros are not required. However, if alphanumeric values are entered, the field is not zero-filled.<br>If the position number is not known, click ⋮. The Positions pop-up window opens with a list of all positions.<br><br>To search for specific positions, type data in one or more of the search fields.<br>Click **Search**. A list of data that matches the search criteria is displayed.<br><br>Select a position number from the list. Otherwise, click **Cancel**. |
| **Position Description** | Begin typing a position description, a drop-down list of corresponding data is displayed. Select a position description from the list.<br>If the position description is not known, click ⋮. The Positions pop-up window opens with a list of all positions.<br><br>To search for specific positions, type data in one or more of the search fields.<br>Click **Search**. A list of data that matches the search criteria is displayed.<br><br>Select a position number from the list. Otherwise, click **Cancel**.<br><br>The position **Description** field in the top grid is only enabled for editing if the **Allow CYR Position Description Changes (Admin only)** field is selected on the District Administration > Options > PMIS District Options page. |

❑ Click **Retrieve**. The associated billet information is displayed.

❑ Click 🔍 to display the position detail information for the selected position.

❑ Under **Vacancy/Budget Information**:

| | |
|---|---|
| **Pay Grade** | Type the three-character code for the pay grade, or click ⋮ to select a pay grade from the list. |
| **Pay Step** | Type the two-character code for the salary level within the indicated pay grade, or click ⋮ to select a pay step from the list. |
| **Schedule** | This field is used for positions tied to an annual table. Type the optional, locally assigned, single-character code that is used to indicate the separate pay schedules for professional and support staff with the same pay grade, pay step, and the maximum number of days employed, or click ⋮ to select a schedule from the list. |
| **FTE** | Type the full-time equivalent amount used to calculate salaries in payroll. |

| | |
|---|---|
| **Midpoint Base** | Click to select the midpoint base.<br><br>*D - Midpoint*<br>*N - Minimum*<br>*X - Maximum* |
| **Plus Percent of Midpoint** | |
| **Unemployment Eligible** | Select if the position is to have unemployment taxes calculated as part of the budgeting process. |
| **FICA/Medicare Eligible** | Click to select the FICA/Medicare eligibility for the position. |
| **TRS Status** | Click to select the TRS eligibility status for the position. |

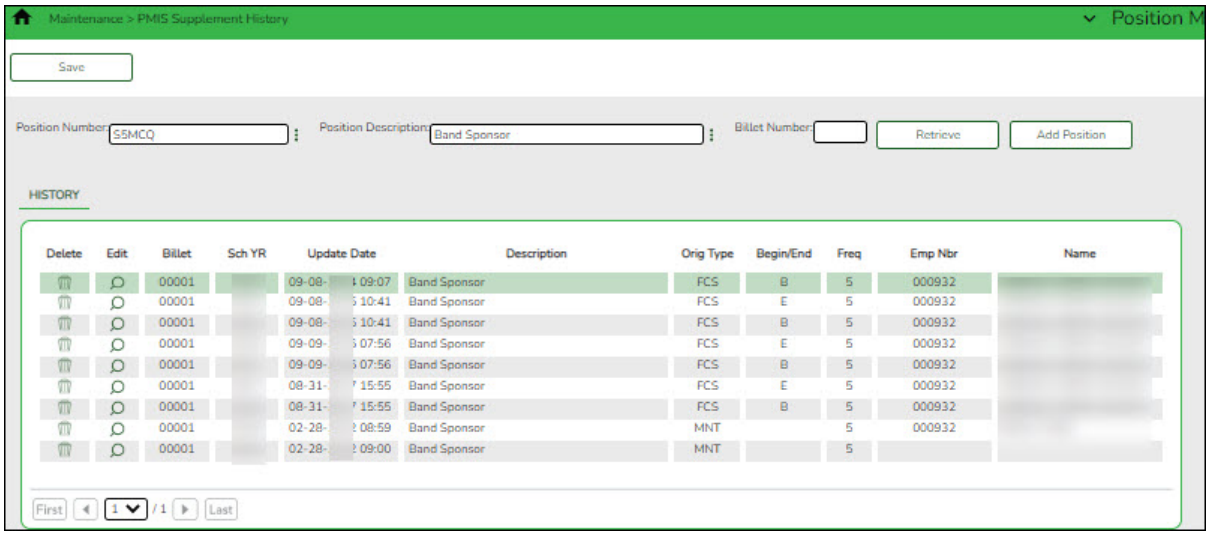
❑ Click **Save**.

**PMIS Position History** - This page is used to create a historical record for changes that occur in the current year. The admin and modify pages display the Position Management information as it currently exists, and the historical page displays previous (historical) information. You must be logged on to the current year to view historical data.

- Position Management > Maintenance > PMIS Position History

This page is used to view historical position changes. Since each change made to a position management record creates a new historical record, many records may exist for an employee. Each change in position (CIP), position maintenance, and forecast moves are displayed on this page. This information is helpful if CIP calculation results are not as expected. You can review all position history or specific billet history.

This data serves as a historical record and should not be modified.



## Retrieve a historical position record:

| Field | Description |
|---|---|
| **Position Number** | Begin typing a position number, a drop-down list of corresponding data is displayed. Select a position number from the list. The field can be a maximum of 13 characters. Leading zeros are not required. However, if alphanumeric values are entered, the field is not zero-filled.<br>If the position number is not known, click ⋮. The Positions pop-up window opens with a list of all positions.<br><br>To search for specific positions, type data in one or more of the search fields.<br>Click **Search**. A list of data that matches the search criteria is displayed.<br><br>Select a position number from the list. Otherwise, click **Cancel**. |
| **Position Description** | Begin typing a position description, a drop-down list of corresponding data is displayed. Select a position description from the list.<br>If the position description is not known, click ⋮. The Positions pop-up window opens with a list of all positions.<br><br>To search for specific positions, type data in one or more of the search fields.<br>Click **Search**. A list of data that matches the search criteria is displayed.<br><br>Select a position number from the list. Otherwise, click **Cancel**.<br><br>The position **Description** field in the top grid is only enabled for editing if the **Allow CYR Position Description Changes (Admin only)** field is selected on the District Administration > Options > PMIS District Options page. |

❑ Click **Retrieve**. The associated billet information is displayed.

| | |
|---|---|
| **Billet Number** | Type the billet number used to identify the various positions within the position number. The field can be a maximum of five digits. Leading zeros are not required. |

❑ Click **Retrieve** to display the position history information. The grid displays the following information for the selected position:

- **Billet**
- **Sch YR**
- **Update Date**
- **Description**
- **Orig Type**
- **Begin/End**
- **Freq**
- **Emp Nbr**
- **Name**

❑ Click to open the position details pop-up window.

❑ Click the Position Record, Distribution, and Date tabs to view the historical data for the selected record.

### Other functions and features:

| | |
|---|---|
| **Retrieve** | The **Retrieve** button is also used to retrieve information from the last save. If you click **Retrieve**, any unsaved changes are lost. |
| | Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved.<br><br>Click **Save**. |

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## Manage Supplemental Positions

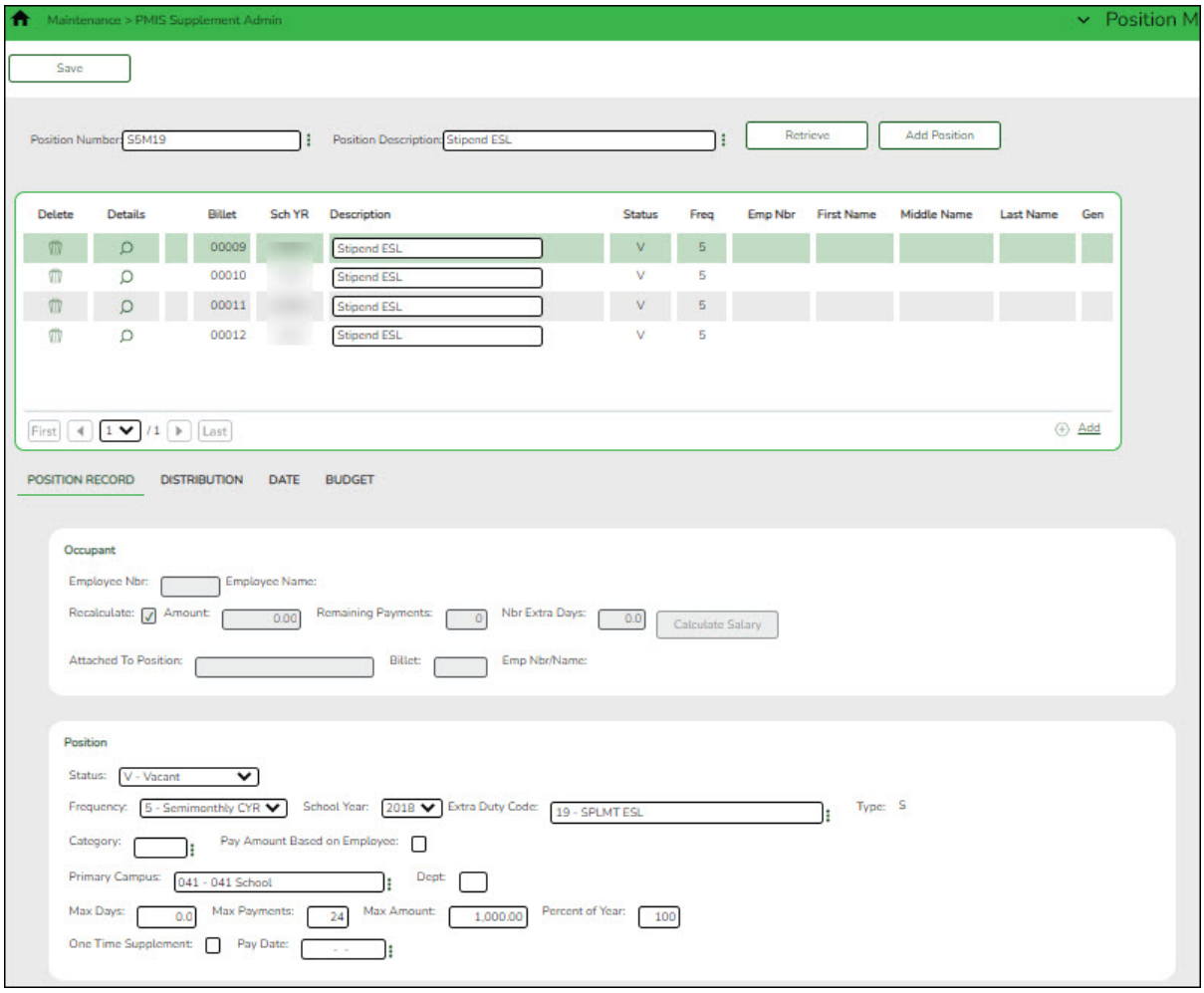
Supplemental positions include flat rate stipends and extra days. Flat rates are exact dollar amounts (e.g., $200 for travel or $200 for a student council sponsor) and extra day stipends allow for a number of days to be entered (e.g., five days for cheer or 15 days for football). The extra day stipend uses the following calculation: # of extra days x the daily rate (regular position) = payment amount.

Supplemental positions are managed on the PMIS Supplement Admin, PMIS Supplement Modify, PMIS Supplement History pages. Similar to the regular positions, each supplemental position record contains data on the Position Record, Distribution, Data, and Budget tabs.

**PMIS Supplement Admin** - This page is used to create, modify, and delete supplemental positions, and is only available when logged on to the current year. Each position contains data on the following tabs:

- Position Management > Maintenance > PMIS Supplement Admin > Position Record

  This tab is used to maintain the supplement position record for each supplement position in the LEA.




## Add or modify a record:

| Field | Description |
|---|---|
| **Position Number** | Begin typing a position number, a drop-down list of corresponding data is displayed. Select a position number from the list. The field can be a maximum of 13 characters. Leading zeros are not required. However, if alphanumeric values are entered, the field is not zero-filled.<br>If the position number is not known, click ⋮. The Positions pop-up window opens with a list of all positions.<br><br>To search for specific positions, type data in one or more of the search fields.<br>Click **Search**. A list of data that matches the search criteria is displayed.<br><br>Select a position number from the list. Otherwise, click **Cancel**. |

| Field | Description |
|---|---|
| **Position Description** | Begin typing a position description, a drop-down list of corresponding data is displayed. Select a position description from the list.<br>If the position description is not known, click ⋮. The Positions pop-up window opens with a list of all positions.<br><br>To search for specific positions, type data in one or more of the search fields.<br>Click **Search**. A list of data that matches the search criteria is displayed.<br><br>Select a position number from the list. Otherwise, click **Cancel**.<br><br>The position **Description** field in the top grid is only enabled for editing if the **Allow CYR Position Description Changes (Admin only)** field is selected on the District Administration > Options > PMIS District Options page. |

❑ Click **Retrieve**. The associated billet information is displayed.

❑ If you click **+Add**, billet information is populated when data is entered under **Occupant**. For existing supplement positions, the billet information is display only.

❑ Click 🔍 to display the position detail information for the selected position.

❑ Under **Occupant**:

| | |
|---|---|
| **Employee Nbr** | Type the employee number, or click ⋮ to select one from the list. |
| **Employee Name** | Populated based on the selected **Employee Nbr**. |
| **Recalculate** | Select to recalculate the supplemental pay amount during the forecast processing. |
| **Amount** | Type the supplement amount. |
| **Remaining Payments** | Type the number of payments remaining to be made to the employee during the current contract period. This is a required field. |
| **Nbr Extra Days** | Type the actual number of days the employee worked. |
| **Attached to Position** | Type the name of the position attached to the selected supplement position, or click ⋮ to select one from the list. |
| **Billet** | Type the billet number of the position attached to the selected supplement position. The field can be a maximum of five characters. |
| **Emp Nbr/Name** | This field is display only. |

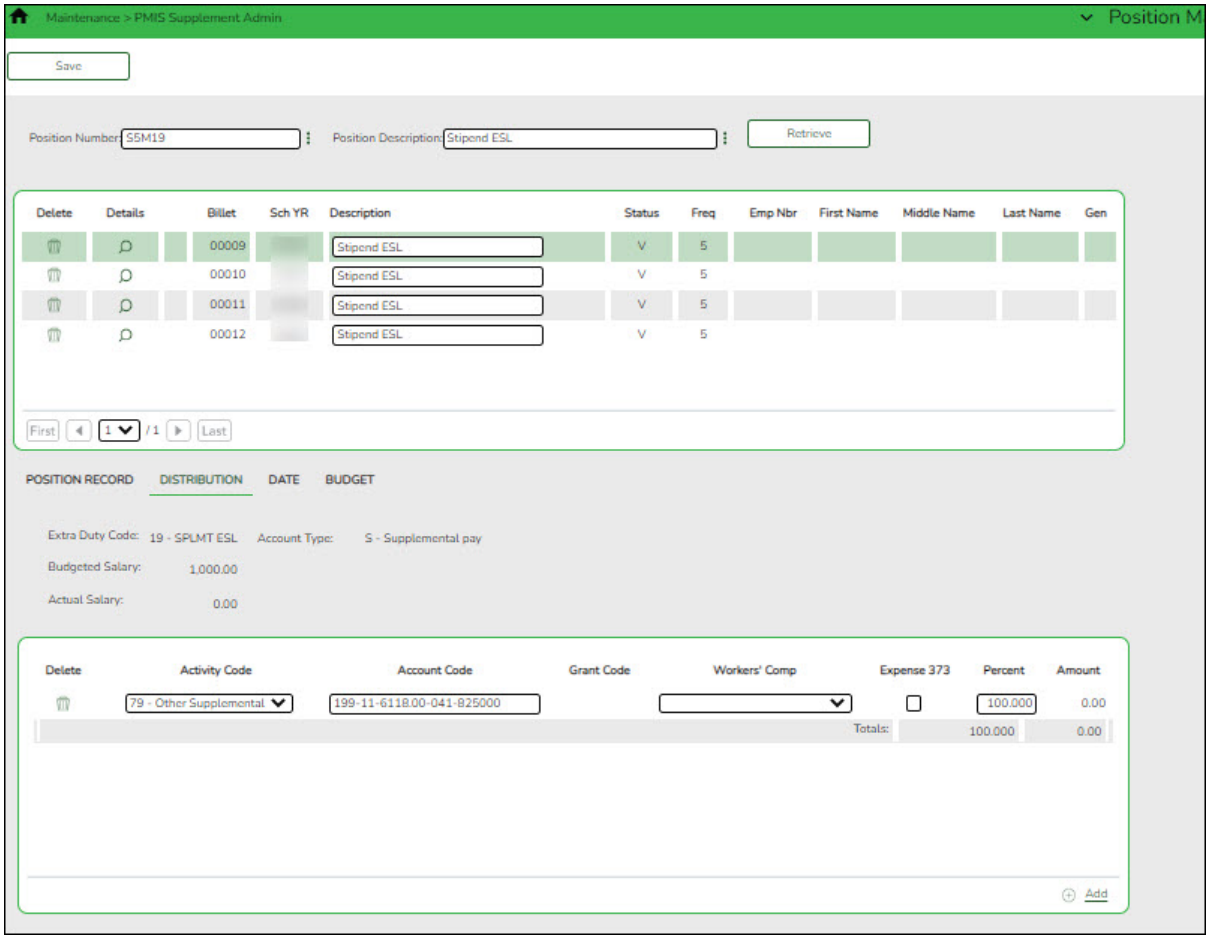
❑ Under **Position**:

| | |
|---|---|
| **Status** | Click ⌄ to select the status of the supplement position.<br><br>*A - Active* - The position is occupied.<br><br>*H - Position on Hold* - The position is vacant and is not included in the budget.<br><br>*I - Inactive* - The position is vacant and is not included in the budget.<br><br>*P - Proposed* - The position is vacant, never filled, and may become a vacant or active position. A proposed position can be included in the budget if needed.<br><br>*V - Vacant* - The position is vacant and is included in the budget. |
| **Frequency** | Click ⌄ to select a payroll frequency. This is a required field. |
| **School Year** | Type the school year in the YYYY format. This is a required field. |
| **Extra Duty Code** | Type the extra duty code, or click ⋮ to select a code from the Extra Duty Code list. |
| **Type** | This field is display only. |
| **Category** | Type the code used to categorize positions, or click ⋮ to select a code from the Category Code list. The field can be a maximum of five characters. |
| **Pay Amount Based on Employee** | Select to attach the supplement to the position. When selected, the daily rate from the position is multiplied by the extra number of days to calculate the supplement pay amount. |
| **Primary Campus** | Type the campus to which the position is assigned, or click ⋮ to select a campus from the Campuses list. |
| **Dept** | Type the department code associated with the selected campus. |
| **Max Days** | Type the maximum number of days this position is funded. This number is used when calculating the annual pay based on a daily rate. It is also used when calculating the annual salary using the annual salary table. This is a required field. |
| **Max Payments** | Type the maximum number of days the position is funded. This is a required field. |
| **Max Amount** | Type the maximum amount of the supplement position. |
| **Percent of Year** | Type the percentage of year by which calculate the supplemental pay amount for the new school year flat-rate stipends.<br><br>If the percent of day is less than one hundred percent, the percent of day is used to calculate the salary amount by multiplying the percent of day by the amount in the supplemental pay code table for flat-rate stipends. |
| **One Time Supplement** | Select if the supplement pay is to be paid in one payment. If selected, the **Pay Date** field is required.<br>**Note**: For type G accounts, if **One Time Supplement** is not selected, the supplement is added to the base salary for the job associated to the **Attached to Position** field (or the primary job if the **Attached to Position** field is blank) and is paid with each contract payment. |
| **Pay Date** | Select the date the one-time supplement is to be paid, or click ⋮ to select a pay date from the Pay Dates list. |

❑ Click **Save**.

- Position Management > Maintenance > PMIS Supplement Admin > Distribution

This tab provides a list of the accounts used to fund the supplement positions.




## Add or modify a record:

| Field | Description |
|---|---|
| **Position Number** | Begin typing a position number, a drop-down list of corresponding data is displayed. Select a position number from the list. The field can be a maximum of 13 characters. Leading zeros are not required. However, if alphanumeric values are entered, the field is not zero-filled.<br>If the position number is not known, click ⋮. The Positions pop-up window opens with a list of all positions.<br><br>To search for specific positions, type data in one or more of the search fields.<br>Click **Search**. A list of data that matches the search criteria is displayed.<br><br>Select a position number from the list. Otherwise, click **Cancel**. |
| **Position Description** | Begin typing a position description, a drop-down list of corresponding data is displayed. Select a position description from the list.<br>If the position description is not known, click ⋮. The Positions pop-up window opens with a list of all positions.<br><br>To search for specific positions, type data in one or more of the search fields.<br>Click **Search**. A list of data that matches the search criteria is displayed.<br><br>Select a position number from the list. Otherwise, click **Cancel**.<br><br>The position **Description** field in the top grid is only enabled for editing if the **Allow CYR Position Description Changes (Admin only)** field is selected on the District Administration > Options > PMIS District Options page. |

❑ Click **Retrieve**. The associated billet information is displayed.

❑ Click 🔍 to display the position detail information for the selected position.

The following fields are display only:

- **Extra Duty Code**
- **Account Type**
- **Budgeted Salary**
- **Actual Salary**

❑ Click **+Add** to add a row.

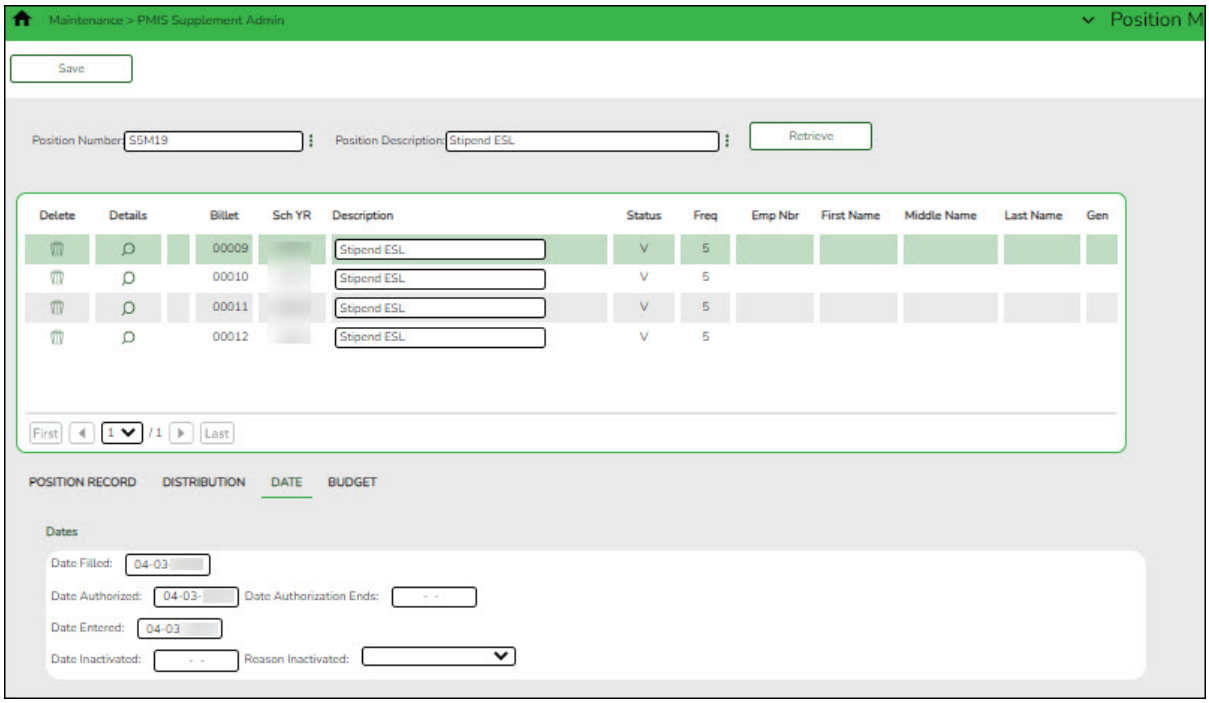
| | |
|---|---|
| **Activity Code** | Click ⌄ to select an activity code. |
| **Account Code** | Type the account code. As you type the data, a drop-down list of corresponding data is displayed. Select an account code from the list. |
| **Grant Code** | This field is display only. |
| **Workers' Comp** | This field is display only. |
| **Expense 373** | Select to include the distribution amount in the above state base (ASB) distribution for TRS. If the field is not selected, the amount is not used for distribution of the ASB amount on the TRS 373 Report. |

| | |
|---|---|
| **Percent** | Type the distribution percentage. |
| **Amount** | This field is display only. |

❑ Click **Save**.

- Position Management > Maintenance > PMIS Supplement Admin > Date

This tab is used to create, modify, or delete dates relating to a supplement position record.




## Add or modify a record:

| Field | Description |
|---|---|
| **Position Number** | Begin typing a position number, a drop-down list of corresponding data is displayed. Select a position number from the list. The field can be a maximum of 13 characters. Leading zeros are not required. However, if alphanumeric values are entered, the field is not zero-filled.<br>If the position number is not known, click ⋮. The Positions pop-up window opens with a list of all positions.<br><br>To search for specific positions, type data in one or more of the search fields.<br>Click **Search**. A list of data that matches the search criteria is displayed.<br><br>Select a position number from the list. Otherwise, click **Cancel**. |

| Field | Description |
|---|---|
| **Position Description** | Begin typing a position description, a drop-down list of corresponding data is displayed. Select a position description from the list.<br>If the position description is not known, click . The Positions pop-up window opens with a list of all positions.<br><br>To search for specific positions, type data in one or more of the search fields.<br>Click **Search**. A list of data that matches the search criteria is displayed.<br><br>Select a position number from the list. Otherwise, click **Cancel**.<br><br>The position **Description** field in the top grid is only enabled for editing if the **Allow CYR Position Description Changes (Admin only)** field is selected on the District Administration > Options > PMIS District Options page. |

❑ Click **Retrieve**. The associated billet information is displayed.

❑ Click to display the position detail information for the selected position.

❑ Under **Dates**:

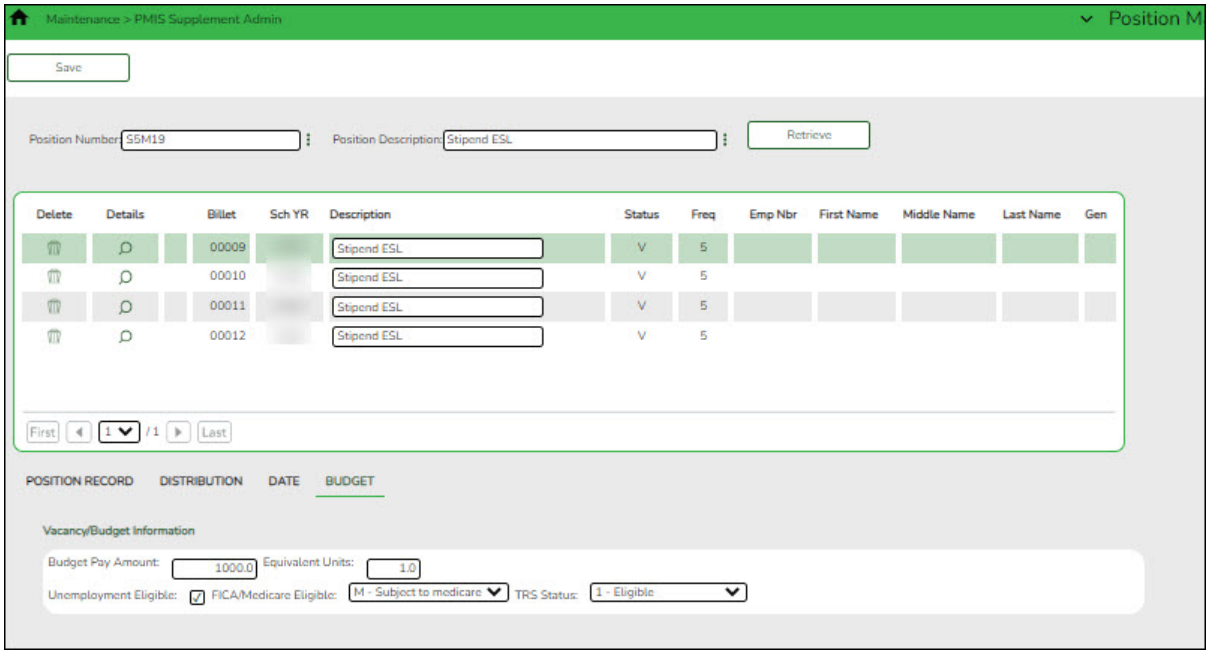
| | |
|---|---|
| **Date Filled** | Populated with the date the position was filled, or you can type a date in MMDDYYYY format. For a new position, the field is automatically populated with the current date. |
| **Date Authorized** | Populated with the date the position was authorized, or you can type a date in MMDDYYYY format. For a new position, the field is automatically populated with the current date. |
| **Date Authorization Ends** | Populated with the date the position authorization ends, or you can type a date in MMDDYYYY format. |
| **Date Entered** | Populated with the date the position was entered in the system, or you can type a date in MMDDYYYY format. For a new position, the field is automatically populated with the current date. |
| **Date Inactivated** | Populated with the date the position was inactivated, or you can type a date in MMDDYYYY format. |
| **Reason Inactivated** | Click to select the reason the position was inactivated. |

❑ Click **Save**.

◦ Position Management > Maintenance > PMIS Supplement Admin > Budget

This tab is used to create, modify, or delete budget data related to a supplement position record.

- If the position is vacant, the budget values are used to calculate the budget requirements for the position.
- If the position is for a new employee, the budget values will be populated to the new employee's payroll records (e.g., job information, pay information).
- If the position is for an existing employee, the budget values are not used.




## Add or modify a record:

| Field | Description |
|---|---|
| **Position Number** | Begin typing a position number, a drop-down list of corresponding data is displayed. Select a position number from the list. The field can be a maximum of 13 characters. Leading zeros are not required. However, if alphanumeric values are entered, the field is not zero-filled.<br>If the position number is not known, click ⋮. The Positions pop-up window opens with a list of all positions.<br><br>To search for specific positions, type data in one or more of the search fields.<br>Click **Search**. A list of data that matches the search criteria is displayed.<br><br>Select a position number from the list. Otherwise, click **Cancel**. |
| **Position Description** | Begin typing a position description, a drop-down list of corresponding data is displayed. Select a position description from the list.<br>If the position description is not known, click ⋮. The Positions pop-up window opens with a list of all positions.<br><br>To search for specific positions, type data in one or more of the search fields.<br>Click **Search**. A list of data that matches the search criteria is displayed.<br><br>Select a position number from the list. Otherwise, click **Cancel**.<br><br>The position **Description** field in the top grid is only enabled for editing if the **Allow CYR Position Description Changes (Admin only)** field is selected on the District Administration > Options > PMIS District Options page. |

❑ Click **Retrieve**. The associated billet information is displayed.

❑ Click to display the position detail information for the selected position.

❑ Under **Vacancy/Budget Information**:

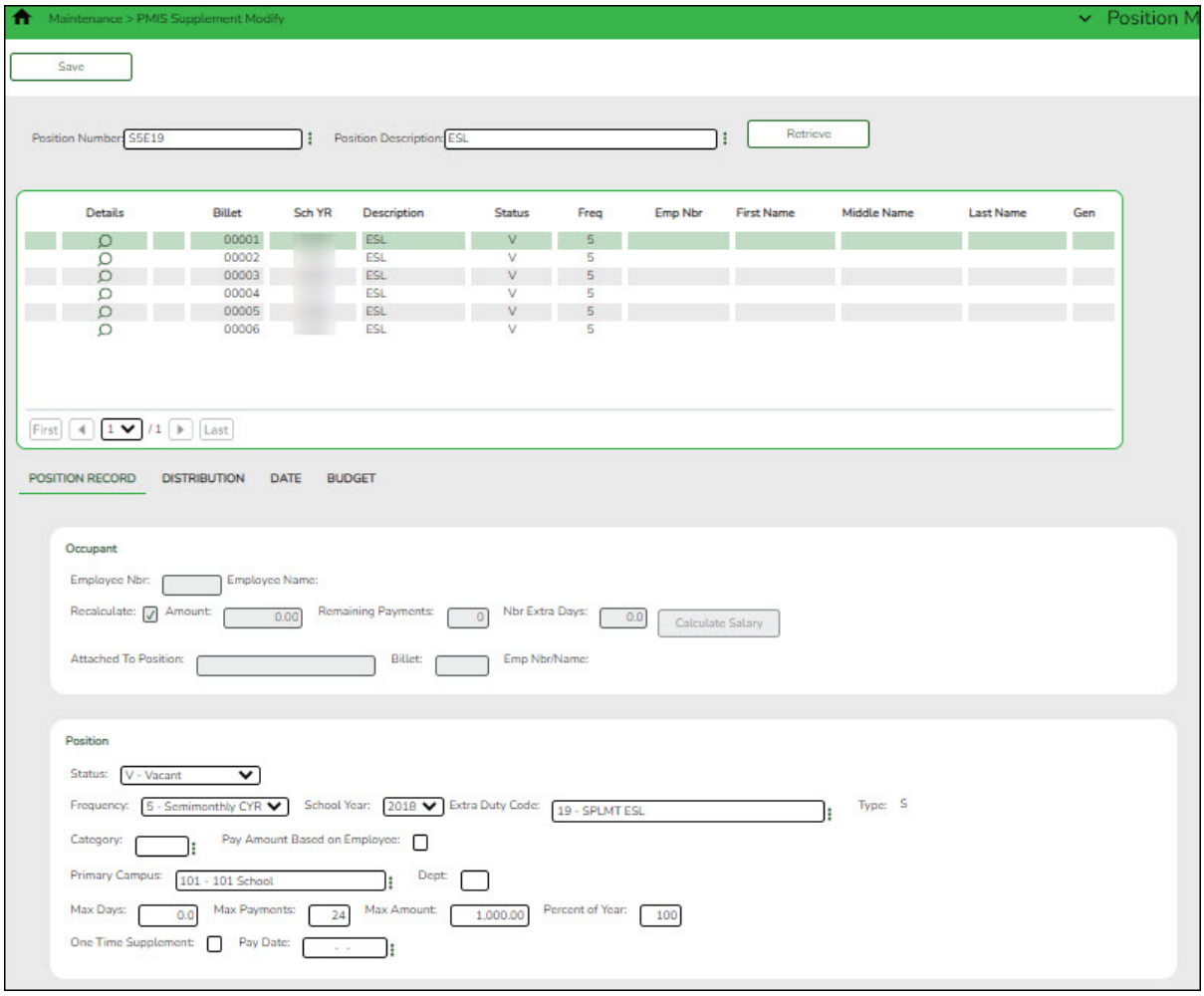
| | |
|---|---|
| **Budget Pay Amount** | Type the salary for the position. |
| **Equivalent Units** | Type the full-time equivalent number used to calculate the number of units. This field is used when a supplement amount is allocated to more than one employee. For example, if two employees with the same position number but different billet numbers share the supplement, type .50 in the field. |
| **Unemployment Eligible** | Select if the position is to have unemployment taxes calculated as part of the budgeting process. |
| **FICA/Medicare Eligible** | Click to select the FICA/Medicare eligibility for the position. |
| **TRS Status** | Click to select the TRS eligibility status for the position. |

❑ Click **Save**.

**PMIS Supplement Modify** - This page is used to modify existing supplement positions. If you have LEA employees who require restricted access (e.g., employees who should not create positions), you can provide those users with permission to this page. Each position contains data on the following tabs:

- Position Management > Maintenance > PMIS Supplement Modify > Position Record

  This tab is used to maintain the supplement position record for each supplement position in the LEA.




## Modify a record:

| Field | Description |
|---|---|
| **Position Number** | Begin typing a position number, a drop-down list of corresponding data is displayed. Select a position number from the list. The field can be a maximum of 13 characters. Leading zeros are not required. However, if alphanumeric values are entered, the field is not zero-filled.<br>If the position number is not known, click ⋮. The Positions pop-up window opens with a list of all positions.<br><br>To search for specific positions, type data in one or more of the search fields.<br>Click **Search**. A list of data that matches the search criteria is displayed.<br><br>Select a position number from the list. Otherwise, click **Cancel**. |

| Field | Description |
|---|---|
| **Position Description** | Begin typing a position description, a drop-down list of corresponding data is displayed. Select a position description from the list.<br>If the position description is not known, click ⋮. The Positions pop-up window opens with a list of all positions.<br><br>To search for specific positions, type data in one or more of the search fields.<br>Click **Search**. A list of data that matches the search criteria is displayed.<br><br>Select a position number from the list. Otherwise, click **Cancel**.<br><br>The position **Description** field in the top grid is only enabled for editing if the **Allow CYR Position Description Changes (Admin only)** field is selected on the District Administration > Options > PMIS District Options page. |

❑ Click **Retrieve**. The associated billet information is displayed.

❑ Click 🔍 to display the position detail information for the selected position.

❑ Under **Occupant**:

| | |
|---|---|
| **Employee Nbr** | Type the employee number, or click ⋮ to select one from the list. |
| **Employee Name** | Populated based on the selected **Employee Nbr**. |
| **Recalculate** | Select to recalculate the supplemental pay amount during the forecast processing. |
| **Amount** | Type the supplement amount. |
| **Remaining Payments** | Type the number of payments remaining to be made to the employee during the current contract period. This is a required field. |
| **Nbr Extra Days** | Type the actual number of days the employee worked. |
| **Attached to Position** | Type the name of the position attached to the selected supplement position, or click ⋮ to select one from the list. |
| **Billet** | Type the billet number of the position attached to the selected supplement position. The field can be a maximum of five characters. |
| **Emp Nbr/Name** | This field is display only. |

❑ Click **Calculate Salary** to complete the salary calculation.

❑ Under **Position**:

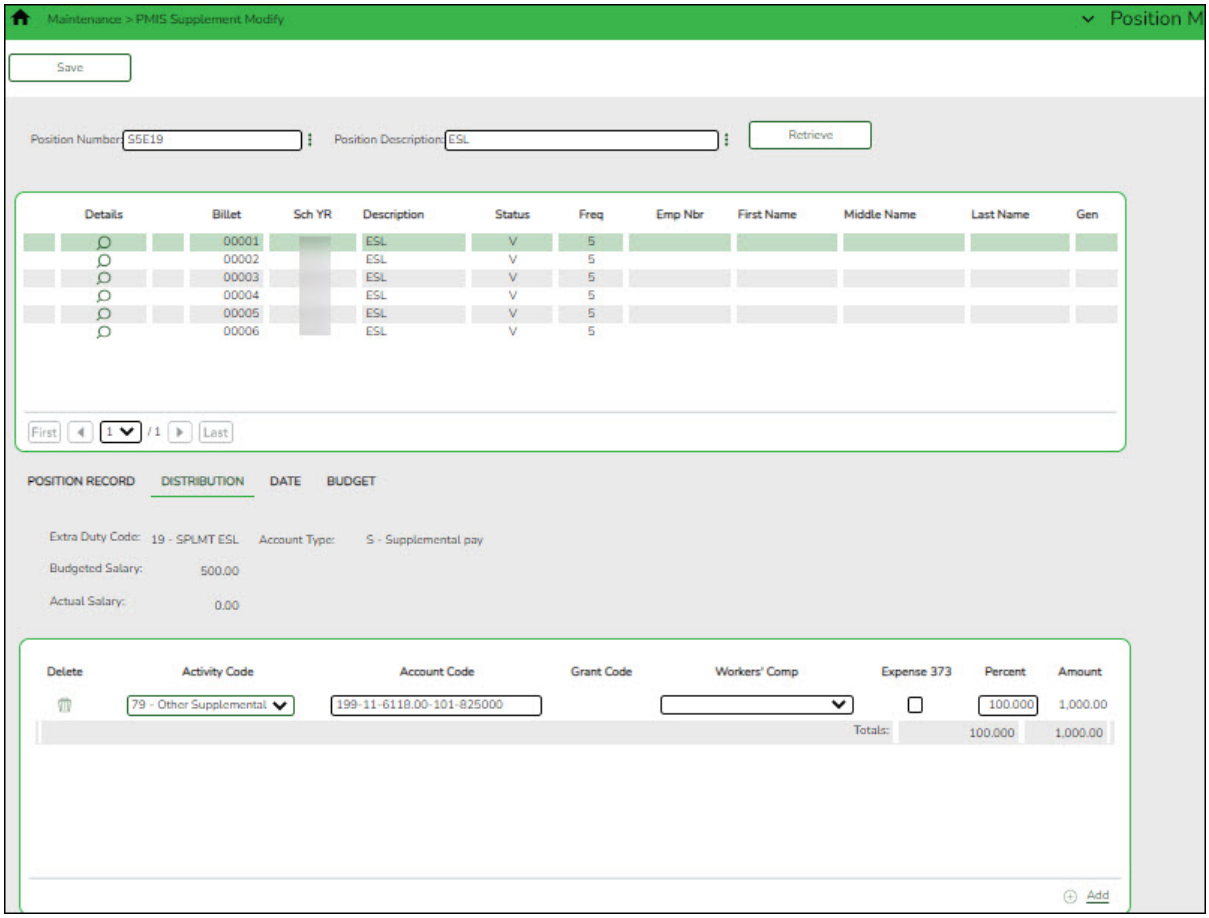
| | |
|---|---|
| **Accept Changes** | Select to indicate that any changes made in the current year will be reflected in the next year. Any changes made in forecast do not reflect in the current year regardless of the field selection. |

| | |
|---|---|
| **Status** | Click to select the status of the supplement position.<br><br>*A - Active* - The position is occupied.<br><br>*H - Position on Hold* - The position is vacant and is not included in the budget.<br><br>*I - Inactive* - The position is vacant and is not included in the budget.<br><br>*P - Proposed* - The position is vacant, never filled, and may become a vacant or active position. A proposed position can be included in the budget if needed.<br><br>*V - Vacant* - The position is vacant and is included in the budget. |
| **Frequency** | Click to select a payroll frequency. This is a required field. |
| **School Year** | Type the school year in the YYYY format. This is a required field. |
| **Extra Duty Code** | Type the extra duty code, or click to select a code from the Extra Duty Code list. |
| **Type** | This field is display only. |
| **Category** | Type the code used to categorize positions, or click to select a code from the Category Code list. The field can be a maximum of five characters. |
| **Pay Amount Based on Employee** | Select to attach the supplement to the position. When selected, the daily rate from the position is multiplied by the extra number of days to calculate the supplement pay amount. |
| **Primary Campus** | Type the campus to which the position is assigned, or click to select a campus from the Campuses list. |
| **Dept** | Type the department code associated with the selected campus. |
| **Max Days** | Type the maximum number of days this position is funded. This number is used when calculating the annual pay based on a daily rate. It is also used when calculating the annual salary using the annual salary table. This is a required field. |
| **Max Payments** | Type the maximum number of days the position is funded. This is a required field. |
| **Max Amount** | Type the maximum amount of the supplement position. |
| **Percent of Year** | Type the percentage of year by which calculate the supplemental pay amount for the new school year flat-rate stipends.<br><br>If the percent of day is less than one hundred percent, the percent of day is used to calculate the salary amount by multiplying the percent of day by the amount in the supplemental pay code table for flat-rate stipends. |
| **One Time Supplement** | Select if the supplement pay is to be awarded in one payment. If selected, the **Pay Date** field is required.<br>**Note**: For type G accounts, if **One Time Supplement** is not selected, the supplement will be added to the base salary for the job associated to the **Attached to Position** field (or the primary job if the **Attached to Position** field is blank) and will be paid with each contract payment. |
| **Pay Date** | Select the date the one-time supplement is to be paid, or click to select a pay date from the Pay Dates list. |

❑ Click **Save**.

- Position Management > Maintenance > PMIS Supplement Modify > Distribution

This tab provides a list of the accounts used to fund the supplement positions.




## Modify a record:

| Field | Description |
|---|---|
| **Position Number** | Begin typing a position number, a drop-down list of corresponding data is displayed. Select a position number from the list. The field can be a maximum of 13 characters. Leading zeros are not required. However, if alphanumeric values are entered, the field is not zero-filled.<br>If the position number is not known, click ⋮. The Positions pop-up window opens with a list of all positions.<br><br>To search for specific positions, type data in one or more of the search fields.<br>Click **Search**. A list of data that matches the search criteria is displayed.<br><br>Select a position number from the list. Otherwise, click **Cancel**. |

| Field | Description |
|---|---|
| **Position Description** | Begin typing a position description, a drop-down list of corresponding data is displayed. Select a position description from the list.<br>If the position description is not known, click ⋮. The Positions pop-up window opens with a list of all positions.<br><br>To search for specific positions, type data in one or more of the search fields.<br>Click **Search**. A list of data that matches the search criteria is displayed.<br><br>Select a position number from the list. Otherwise, click **Cancel**.<br><br>The position **Description** field in the top grid is only enabled for editing if the **Allow CYR Position Description Changes (Admin only)** field is selected on the District Administration > Options > PMIS District Options page. |

❑ Click **Retrieve**. The associated billet information is displayed.

Click 🔍 to display the position detail information for the selected position. The following fields are display only:

**Extra Duty Code**
**Account Type**
**Budgeted Salary**
**Actual Salary**

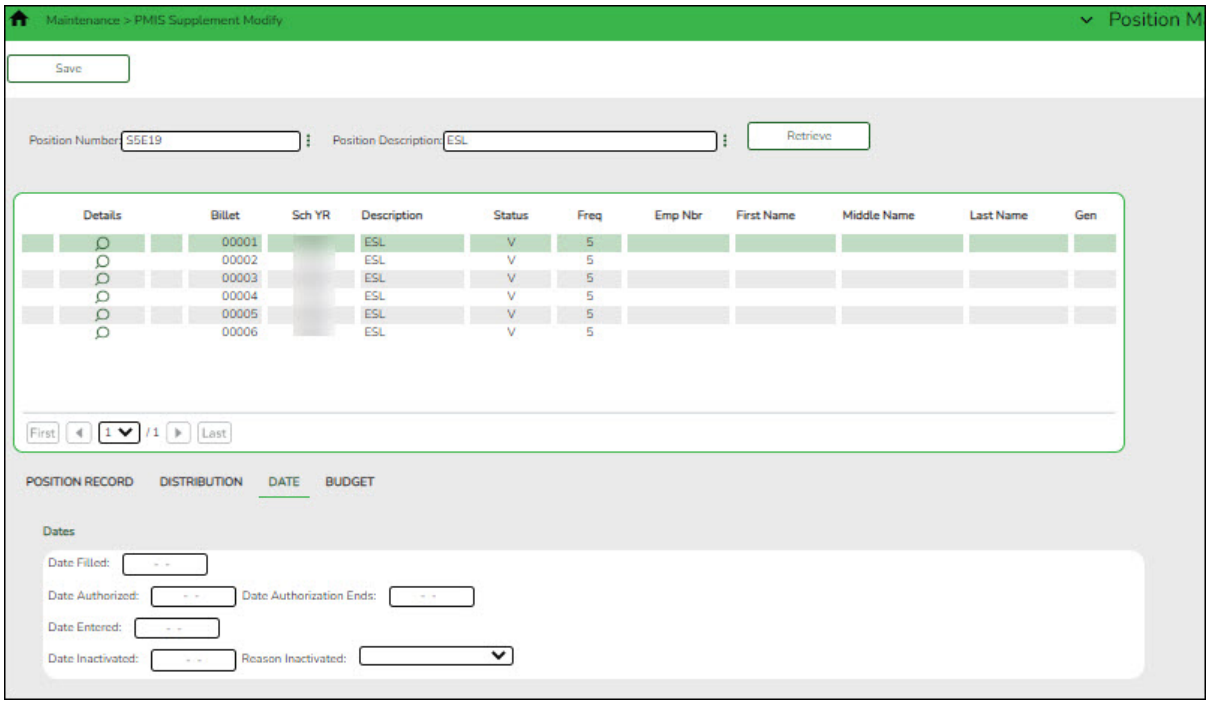
❑ Click **+Add** to add a row.

| | |
|---|---|
| **Activity Code** | Click ⌄ to select an activity code. |
| **Account Code** | Type the account code. As you type the data, a drop-down list of corresponding data is displayed. Select an account code from the list. |
| **Grant Code** | Displays the grant code. |
| **Workers' Comp** | Displays workers' comp code. |
| **Expense 373** | Select to include the distribution amount in the above state base (ASB) distribution for TRS. If the field is not selected, the amount is not used for distribution of the ASB amount on the TRS 373 Report. |
| **Percent** | Type the distribution percentage. |
| **Amount** | This field is display only. |

❑ Click **Save**.

- Position Management > Maintenance > PMIS Supplement Modify > Date

  This tab is used to create, modify, or delete dates relating to a supplement position record.




| Field | Description |
|---|---|
| **Position Number** | Begin typing a position number, a drop-down list of corresponding data is displayed. Select a position number from the list. The field can be a maximum of 13 characters. Leading zeros are not required. However, if alphanumeric values are entered, the field is not zero-filled.<br>If the position number is not known, click ⋮. The Positions pop-up window opens with a list of all positions.<br><br>To search for specific positions, type data in one or more of the search fields.<br>Click **Search**. A list of data that matches the search criteria is displayed.<br><br>Select a position number from the list. Otherwise, click **Cancel**. |
| **Position Description** | Begin typing a position description, a drop-down list of corresponding data is displayed. Select a position description from the list.<br>If the position description is not known, click ⋮. The Positions pop-up window opens with a list of all positions.<br><br>To search for specific positions, type data in one or more of the search fields.<br>Click **Search**. A list of data that matches the search criteria is displayed.<br><br>Select a position number from the list. Otherwise, click **Cancel**.<br><br>The position **Description** field in the top grid is only enabled for editing if the **Allow CYR Position Description Changes (Admin only)** field is selected on the District Administration > Options > PMIS District Options page. |

❑ Click **Retrieve**. The associated billet information is displayed.

❑ Click to display the position detail information for the selected position.

❑ Under **Dates**:

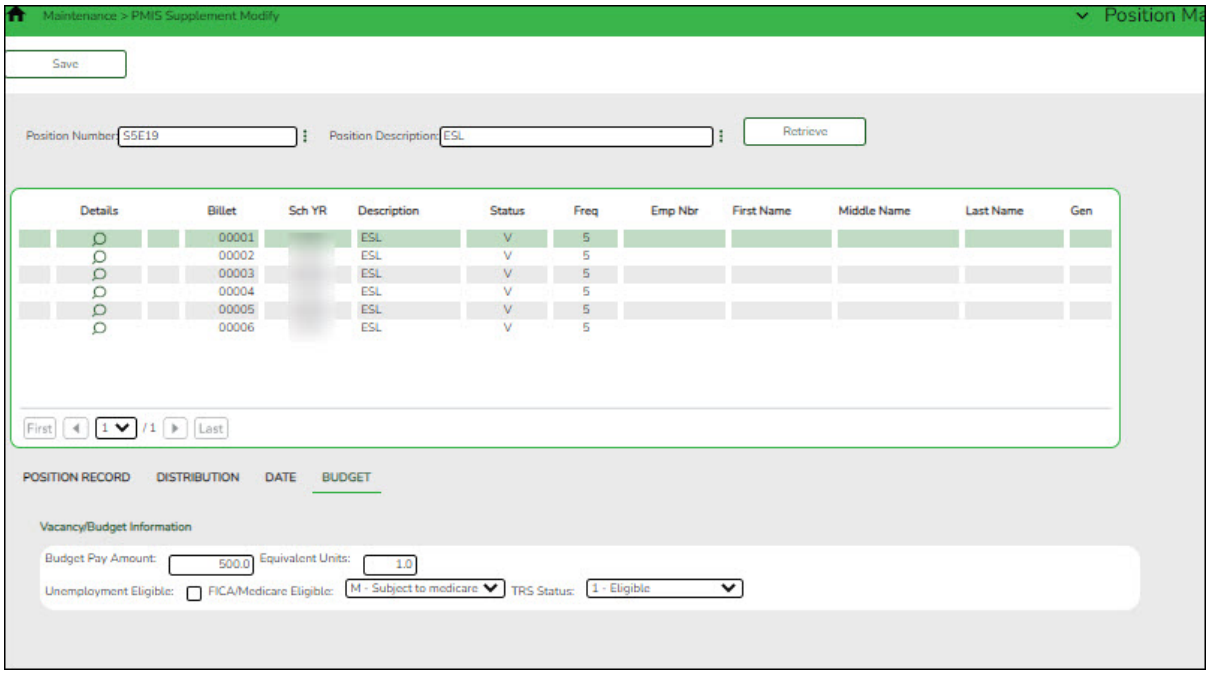
| | |
|---|---|
| **Date Filled** | Populated with the date the position was filled, or you can type a date in MMDDYYYY format. For a new position, the field is automatically populated with the current date. |
| **Date Authorized** | Populated with the date the position was authorized, or you can type a date in MMDDYYYY format. For a new position, the field is automatically populated with the current date. |
| **Date Authorization Ends** | Populated with the date the position authorization ends, or you can type a date in MMDDYYYY format. |
| **Date Entered** | Populated with the date the position was entered in the system, or you can type a date in MMDDYYYY format. For a new position, the field is automatically populated with the current date. |
| **Date Inactivated** | Populated with the date the position was inactivated, or you can type a date in MMDDYYYY format. |
| **Reason Inactivated** | Click to select the reason the position was inactivated. |

❑ Click **Save**.

◦ Position Management > Maintenance > PMIS Supplement Modify > Budget

This tab is used to modify budget data related to a supplement position record.

- If the position is vacant, the budget values are used to calculate the budget requirements for the position.
- If the position is for a new employee, the budget values are populated to the new employee's payroll records (e.g., job information, pay information).
- If the position is for an existing employee, the budget values are not used.



## Modify a record:

| Field | Description |
|---|---|
| **Position Number** | Begin typing a position number, a drop-down list of corresponding data is displayed. Select a position number from the list. The field can be a maximum of 13 characters. Leading zeros are not required. However, if alphanumeric values are entered, the field is not zero-filled.<br>If the position number is not known, click ⋮. The Positions pop-up window opens with a list of all positions.<br><br>To search for specific positions, type data in one or more of the search fields.<br>Click **Search**. A list of data that matches the search criteria is displayed.<br><br>Select a position number from the list. Otherwise, click **Cancel**. |
| **Position Description** | Begin typing a position description, a drop-down list of corresponding data is displayed. Select a position description from the list.<br>If the position description is not known, click ⋮. The Positions pop-up window opens with a list of all positions.<br><br>To search for specific positions, type data in one or more of the search fields.<br>Click **Search**. A list of data that matches the search criteria is displayed.<br><br>Select a position number from the list. Otherwise, click **Cancel**.<br><br>The position **Description** field in the top grid is only enabled for editing if the **Allow CYR Position Description Changes (Admin only)** field is selected on the District Administration > Options > PMIS District Options page. |

❑ Click **Retrieve**. The associated billet information is displayed.

❑ Click 🔍 to display the position detail information for the selected position.

❑ Under **Vacancy/Budget Information**:

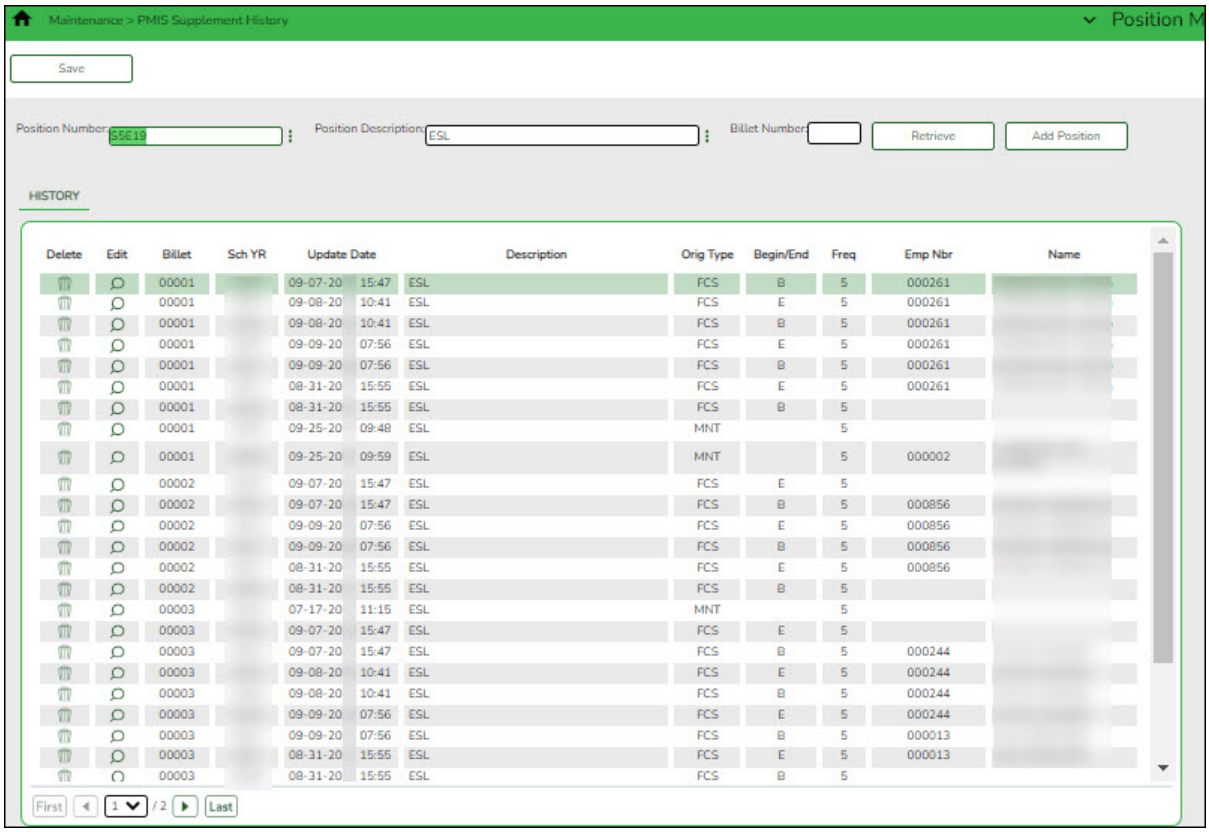
| | |
|---|---|
| **Budget Pay Amount** | Type the salary for the position. |
| **Equivalent Units** | Type the full-time equivalent number used to calculate the number of units. This field is used when a supplement amount is allocated to more than one employee. For example, if two employees with the same position number but different billet numbers share the supplement, type .50 in the field. |
| **Unemployment Eligible** | Select if the position is to have unemployment taxes calculated as part of the budgeting process. |
| **FICA/Medicare Eligible** | Click ⌄ to select the FICA/Medicare eligibility for the position. |
| **TRS Status** | Click ⌄ to select the TRS eligibility status for the position. |

❑ Click **Save**.

**PMIS Supplement History** - This page is used to create a historical record view changes for changes that occur in the current year. The admin and modify pages display the Position Management information as it currently exists, and the historical page displays previous (historical) information. You must be logged on to the current year to view historical data.

- Position Management > Maintenance > PMIS Supplement History

This page is used to view historical records of data changed on the Maintenance > Supplement Admin or Maintenance > Supplement Modify pages. Since each change made to a supplement position management record creates a new historical record, many records may exist for an employee. Since this data serves as a historical record, the data should not be altered.




## Retrieve a historical supplement position record:

| Field | Description |
|---|---|
| **Position Number** | Begin typing a position number, a drop-down list of corresponding data is displayed. Select a position number from the list. The field can be a maximum of 13 characters. Leading zeros are not required. However, if alphanumeric values are entered, the field is not zero-filled.<br>If the position number is not known, click ⋮. The Positions pop-up window opens with a list of all positions.<br><br>To search for specific positions, type data in one or more of the search fields.<br>Click **Search**. A list of data that matches the search criteria is displayed.<br><br>Select a position number from the list. Otherwise, click **Cancel**. |
| **Position Description** | Begin typing a position description, a drop-down list of corresponding data is displayed. Select a position description from the list.<br>If the position description is not known, click ⋮. The Positions pop-up window opens with a list of all positions.<br><br>To search for specific positions, type data in one or more of the search fields.<br>Click **Search**. A list of data that matches the search criteria is displayed.<br><br>Select a position number from the list. Otherwise, click **Cancel**.<br><br>The position **Description** field in the top grid is only enabled for editing if the **Allow CYR Position Description Changes (Admin only)** field is selected on the District Administration > Options > PMIS District Options page. |

❑ Click **Retrieve**. The associated billet information is displayed.

| | |
|---|---|
| **Billet Number** | Type the billet number used to identify the various positions within the position number. The field can be a maximum of five digits. Leading zeros are not required. |

❑ Click **Retrieve** to display the position history information. The grid displays the following information for the selected employee:

- **Billet**
- **Sch YR**
- **Update Date**
- **Description**
- **Orig Type**
- **Begin/End**
- **Freq**
- **Emp Nbr**
- **Name**

❑ Click 🔍 to edit position history. A dialog box with three tabs (Position Record, Distribution, and Date) is displayed.

❑ Under **Occupant**, the following fields can be modified unless the billet number is 00000.

| | |
|---|---|
| **Emp Nbr** | Type the employee number, or click ⋮ to select an employee from the Employees list. |
| **Emp Name** | Type the employee name. |
| **Amount** | Type the supplement amount. |
| **Remaining Payments** | Type the number of payments remaining to be made to the employee during the current contract period. This is a required field. |
| **Nbr Extra Day** | Type the actual number of days the employee worked. |
| **Attached to Position** | Type the name of the position attached to the selected supplement position, or click ⋮ to select one from the list. |
| **Billet** | Type the billet number of the position attached to the selected supplement position. The field can be a maximum of five characters. |
| **Emp Nbr/Name** | This field is display only. |

❑ Under **Position**:

| | |
|---|---|
| **Freq** | Click ⌄ to select a payroll frequency. This is a required field. |
| **School Yr** | Type the school year in the YYYY format. This is a required field. |
| **Extra Duty Code** | Type an extra duty code, or click ⋮ to select a code from the Extra Duty Codes lookup. |
| **Primary Campus** | Type the code of the primary campus, or click ⋮ to select a primary campus. This is a required field. |
| **Dept** | Type the code used by the district to categorize the department associated with the position. The field can be a single digit. |
| **Pct Year Employed** | Type the number which indicates the total percentage of the employee's responsibilities represented by the job entered.<br><br>For example, if the job represents half of his total assignment, type 50. |
| **One Time Suppl** | Select if the supplement pay is to be awarded in one payment. If selected, the **Pay Date** field is required.<br>**Note**: For type G accounts, if **One Time Supplement** is not selected, the supplement will be added to the base salary for the job associated to the **Attached to Position** field (or the primary job if the **Attached to Position** field is blank) and will be paid with each contract payment. |
| **Max Days** | Type the maximum number of days this position is funded. This number is used when calculating the annual pay based on a daily rate. It is also used when calculating the annual salary using the annual salary table. This is a required field. |
| **Orig Type** | Click ⌄ to select the original transaction type.<br><br>*Move Forecast to CYR*<br>*Maintenance*<br>*Change In Compensation*<br>*Separation*<br>*Non-Comp Position Changes*<br>*Non-Comp Funding Changes* |

| | |
|---|---|
| **Begin/End** | Click ⌄ to indicate the beginning and ending position history records. |

On the **Distribution** tab, the distribution information is not required for a new historical transaction.

❑ Click **+Add** to add a row.

| | |
|---|---|
| **Activity Code** | Click ⌄ to select an activity code. |
| **Account Code** | Type the account code. As you type the data, a drop-down list of corresponding data is displayed. Select an account code from the list. |
| **Grant Code** | Displays the grant code. |
| **Workers' Comp** | Displays workers' comp code. |
| **Expense 373** | Select to include the distribution amount in the above state base (ASB) distribution for TRS. If the field is not selected, the amount is not used for distribution of the ASB amount on the TRS 373 Report. |
| **Employer Contribution** | Select if the distribution should be included as an employer insurance contribution. The field is only available when account type G is selected. |
| **Percent** | Type the distribution percentage. |
| **Amount** | Displays the distribution amount. |

On the Date tab:

| | |
|---|---|
| **Date Filled** | Populated with the date the position was filled, or you can type a date in MMDDYYYY format. For a new position, the field is automatically populated with the current date. |
| **Date Authorized** | Populated with the date the position was authorized, or you can type a date in MMDDYYYY format. For a new position, the field is automatically populated with the current date. |
| **Date Entered** | Populated with the date the position was entered in the system, or you can type a date in MMDDYYYY format. For a new position, the field is automatically populated with the current date. |
| **Date Vacated** | Indicates the date the position was vacated. |
| **Vacated Reason** | Indicates why the position was vacated. Click ⌄ to change the reason. |

❑ Click **Save**.

# Position Management Guides and Checklists

The following guides and checklists provide the necessary information for both new and existing users to begin or continue managing positions using the Position Management application.

## Part 1

- Position Management: Setup and Processing for New Users (prints separately)
- Position Management: Setup and Processing for Existing Users (prints separately)
- Position Management: Salary Simulations Overview (prints separately)
- Position Management: Update NYR Positions and Move Employees to CYR Payroll (prints separately)
- Checklist - Position Management: Interface to Budget (prints separately)
- Checklist - Position Management: Import Position Data to PMIS (prints separately)
- Checklist - Position Management: Import Distribution Data to PMIS (prints separately)

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## Part 2

Follow-up document - addresses changes made to the documentation following the training event.

- Position Management: Setup for New Hires
- Position Management: Process Separations
- Position Management: Perform Non-Comp Funding Changes
- Position Management: Perform Historical Inquiries