



Position Management Process - Sample Timeline

Table of Contents

| | |
|--|---|
| Position Management Process - Sample Timeline | i |
| PMIS Process - Sample Timeline | 1 |

PMIS Process - Sample Timeline

This Position Management Sample Timeline document serves as a suggested timeline for ASCENDER Position Management processes and tasks that occur throughout the year. You can adjust accordingly to meet your LEA's needs.

February-March

Position Management Process - Sample Timeline (February-March)

In the February-March timeframe, prior to using the Position Management application, assemble a planning team comprised of representatives from the necessary departments (Finance/Budget and Payroll/Personnel) to discuss and make informed decisions about the following items.

For complete information, review the [Position Management Process](#) guide.

Timelines | Set up calendars for cutoff dates and anticipated processing dates.

Payroll | Prepare for special circumstances such as pay scale changes based on TASBO studies, new pay structures, new job codes, and employer contribution rate changes, etc.

Budgetary expectations | Discuss new schools, school closings, position consolidations, fund source changes, new supplements (extra duties), or supplement consolidations/eliminations.

Retroactive pay planning | Discuss approved salaries before moving from forecast to current.

Proposed positions | Discuss new positions or inactivations.

Identify groups and determine the following:

- The first pay date codes to be moved into each group.
- The pay scales to be used for each move.
- Design simulations in advance for easy processing.
- Identify stipends/supplements for each group.

Use the District Administration > Tables > PMIS pages to perform the following tasks:

- Update the new school year.
- Update the pay date tables with the new year pay dates.
- Update the school calendar table with the new school year calendars.

- Update the first pay dates for the new school year.
- Update the forecast conversion table with new pay dates, calendars, and first pay dates for all groups including extra duty.
- Copy tables (only job codes and salary tables) from the current to the next year.
- Update the forecast conversion first pay date table when moving employees from 13/27 to 12/26 payments.
- Delete old forecast records.
- Create a forecast from the current year.
- Run the first snapshot of all forecast positions through the simulation process on all salaries and groups.
- Continue to use the simulation process for each group. Forecast record modifications can be performed to modify each simulation until you are satisfied with a simulation to update the forecast records and Budget.

April

Position Management Process - Sample Timeline (April-June)

In the April-June timeframe, perform the following Position Management tasks.

For complete information, review the [Position Management Process](#) guide.

- Edit forecast position records.
- Use reports to verify data.
- Run salary simulations
- Verify forecast records.

June-July

Position Management Process - Sample Timeline (June-July)

In the June-July timeframe, perform the following Position Management task.

For complete information, review the [Position Management Process](#) guide.

Use the [Position Management > Utilities > Update Fiscal Year by Fund](#) page to update the forecast fiscal year for distributions.

July

Position Management Process - Sample Timeline (July)

In the July timeframe, perform the following Position Management tasks.

For complete information, review the [Position Management Process](#) guide.

- Process service records prior to moving forecast to current. Service records should be completed and posted prior to moving those employees who have a July contract begin date.
- Use the [Position Management > Utilities > Move Forecast to CYR Position and Payroll](#) to move the July group from forecast to current.
- Include any travel/business allowance XTRA duties.

August

Position Management Process - Sample Timeline (August)

In the August timeframe, perform the following Position Management tasks.

For complete information, review the [Position Management Process](#) guide.

- Process service records prior to moving forecast to current. Service records should be completed and posted prior to moving those employees who have an August contract begin date.
- Use the [Position Management > Utilities > Move Forecast to CYR Position and Payroll](#) to move the August group from forecast to current.
- Include any travel/business allowance XTRA duties.
- Use the [Position Management > Utilities > Move Forecast to NYR Payroll](#) page to move forecast to the next year payroll for August accruals.

September

Position Management Process - Sample Timeline (September)

In the September timeframe, perform the following Position Management tasks.

For complete information, review the [Position Management Process](#) guide..

- Process service records prior to moving forecast to current. Service records should be completed and posted prior to moving those employees who have a September contract begin date.
- Use the [Position Management > Utilities > Move Forecast to CYR Position and Payroll](#) to move the September group from forecast to current.
- Move all XTRA duty codes.
- Determine if retroactive pay processing is necessary. If so, use the [Position Management > Utilities > Retro Pay Processing](#) to process the retroactive pay process.