pmis_initial_setup_new_users

Table of Contents

pmis_initial_setup_new_users i
QuickGuide: PMIS - Setup and Processing for New Users 1

QuickGuide: PMIS - Setup and Processing for New Users

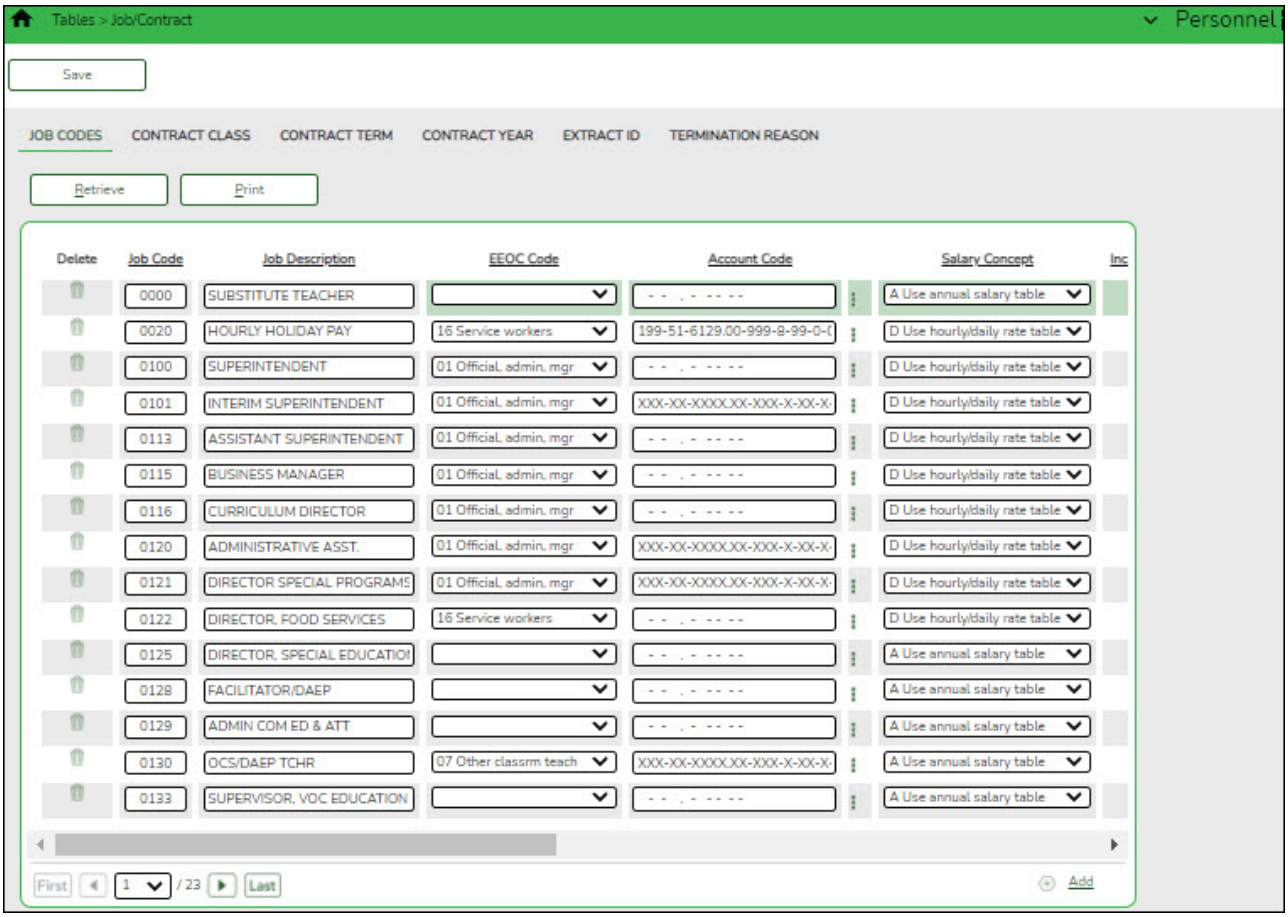
This guide provides new users with the necessary steps to begin using the Position Management Information System (PMIS).

Set up Human Resources Current Year Payroll Tables

1. Review and/or update job codes.

   Personnel > Tables > Job/Contract > Job Codes

   Before beginning this process, consider the existing job codes in the current year payroll. It is important that there are no changes made to the existing job codes that are already assigned to employees in the current year; however, you can add new job codes to the table.



   For LEAs that accrue, each job code can only tie to one accrual code. You may need to perform maintenance to ensure a good starting point. For example, if a job code is set up for a teacher and you have employees with 187 work days and employees with 197 work days tied to that job code, a new job code should be added so that an accrual code exists for both sets of employees. Do not make changes to existing job codes that are tied to employees, changes can

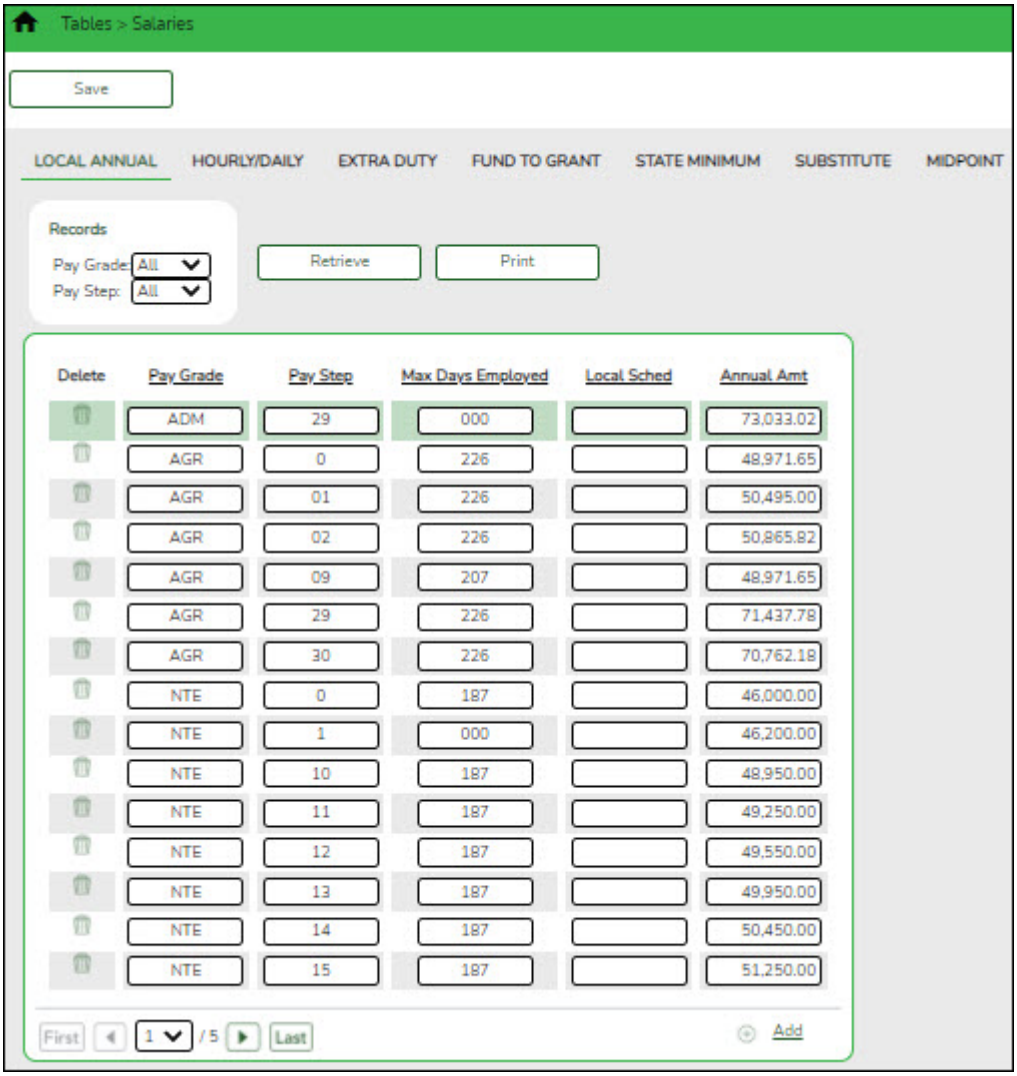
be made when creating positions.

If the LEA expenses workers' compensation, it is important to set up those codes on the job code table. If workers' compensation codes are not established, expensing will not occur for that position. For each position, the workers' compensation code is retrieved from the job code.

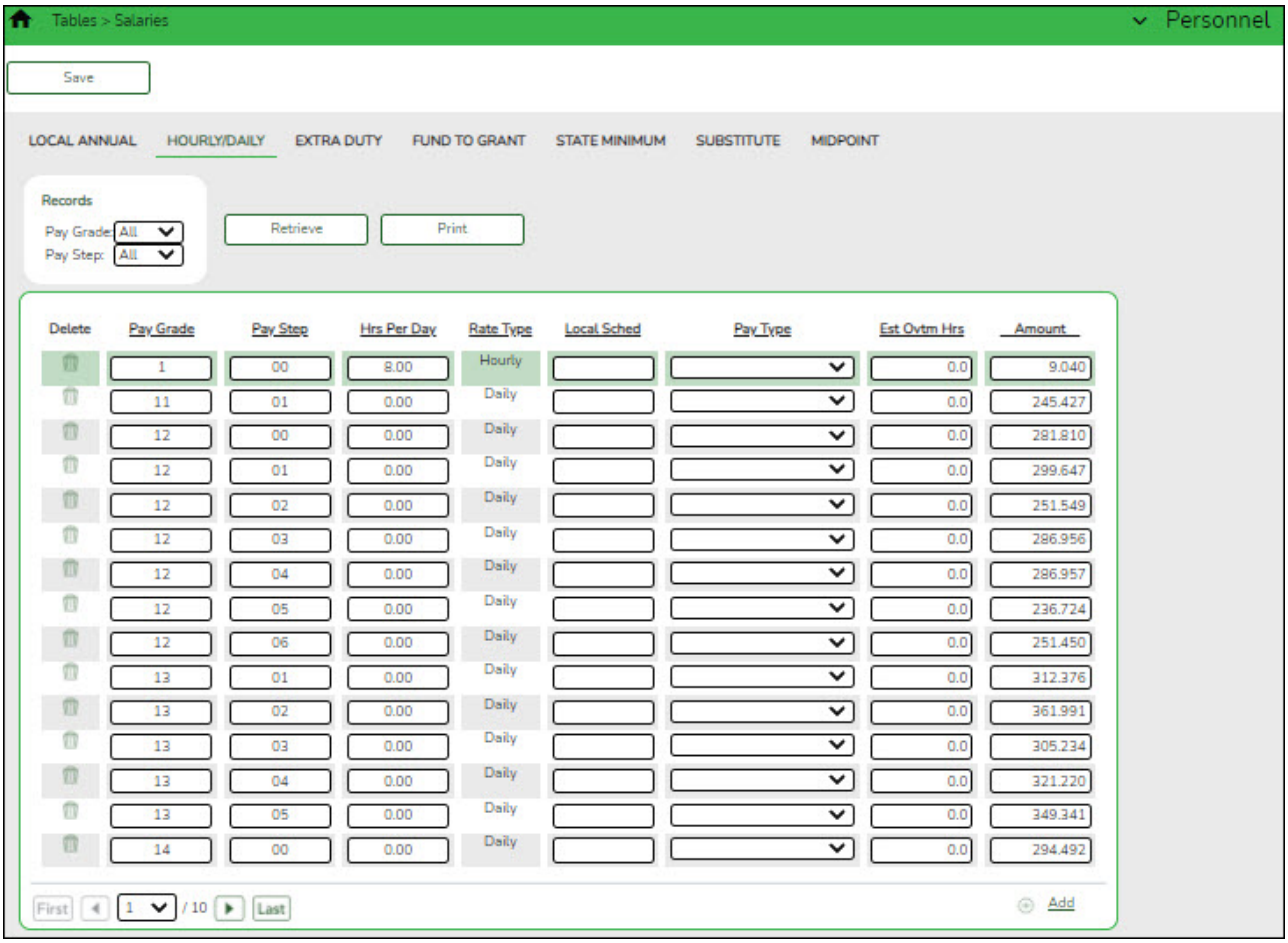
2. Update salary tables.

When using Position Management, all employees must be tied to one of the following salary tables:

Personnel > Tables > Salaries > Local Annual - Contracted employees



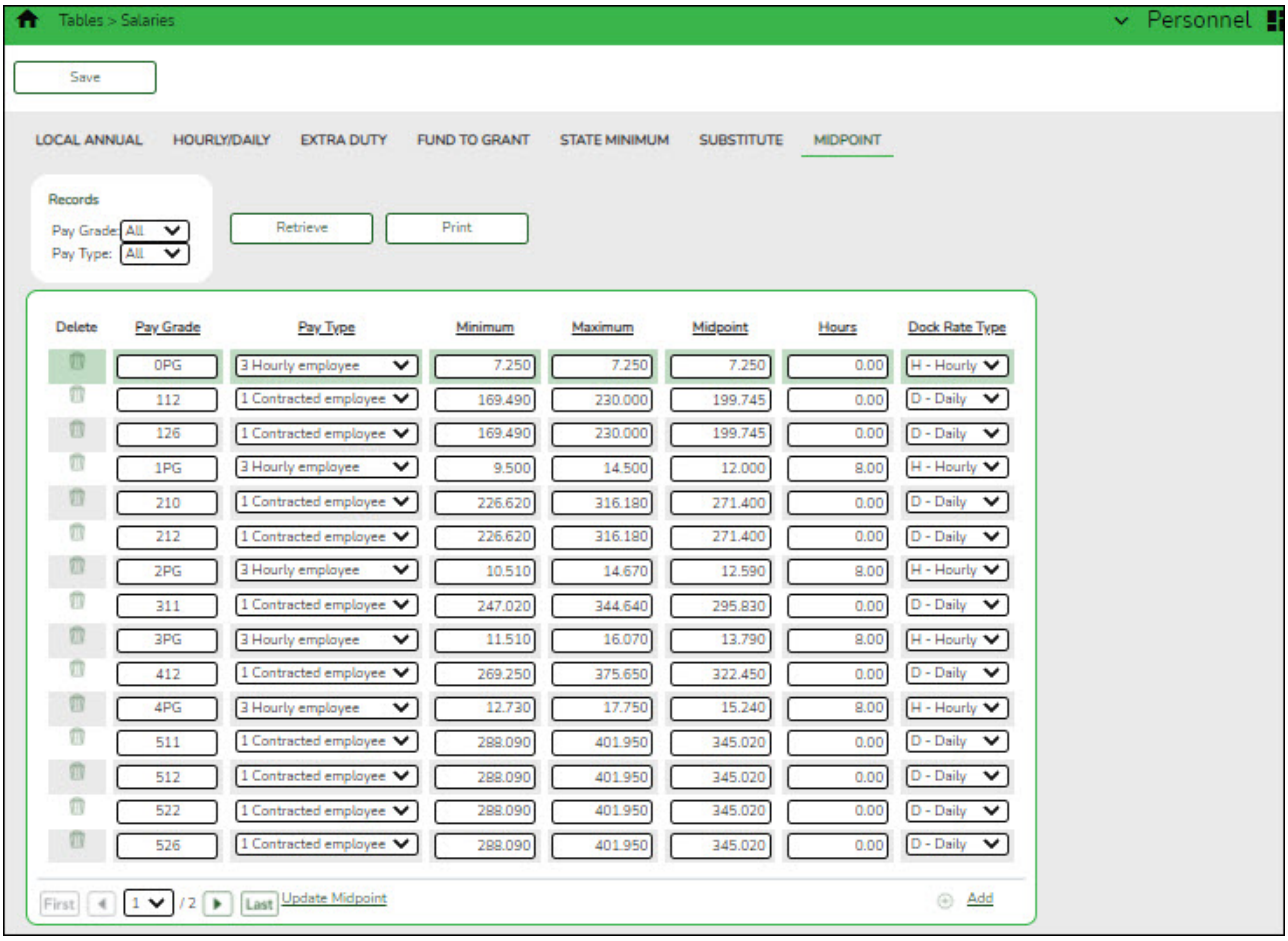
Personnel > Tables > Salaries > Hourly/Daily - Contracted and Non-contracted employees



Personnel > Tables > Salaries > Midpoint - Contracted and Non-contracted employees

If your LEA has employees who are not tied to a salary table, it may be helpful to create a midpoint table. For instance, if all LEA employees are assigned to a pay scale except for cafeteria workers and bus drivers, whose salaries vary, it can be difficult to maintain a consistent table setup. In this case, you can set up a midpoint table with different pay grades for each job and then assign employees to that table.

TIP: Consider grouping “like” jobs when setting up the midpoint table.



❑ Click **+Add** and enter the following information:

- **Pay Grade**
- **Pay Type**
- **Minimum** - The lowest daily pay rate an employee would receive in this pay grade/pay type.
- **Maximum** - The highest daily pay rate an employee would receive in this pay grade/pay type.

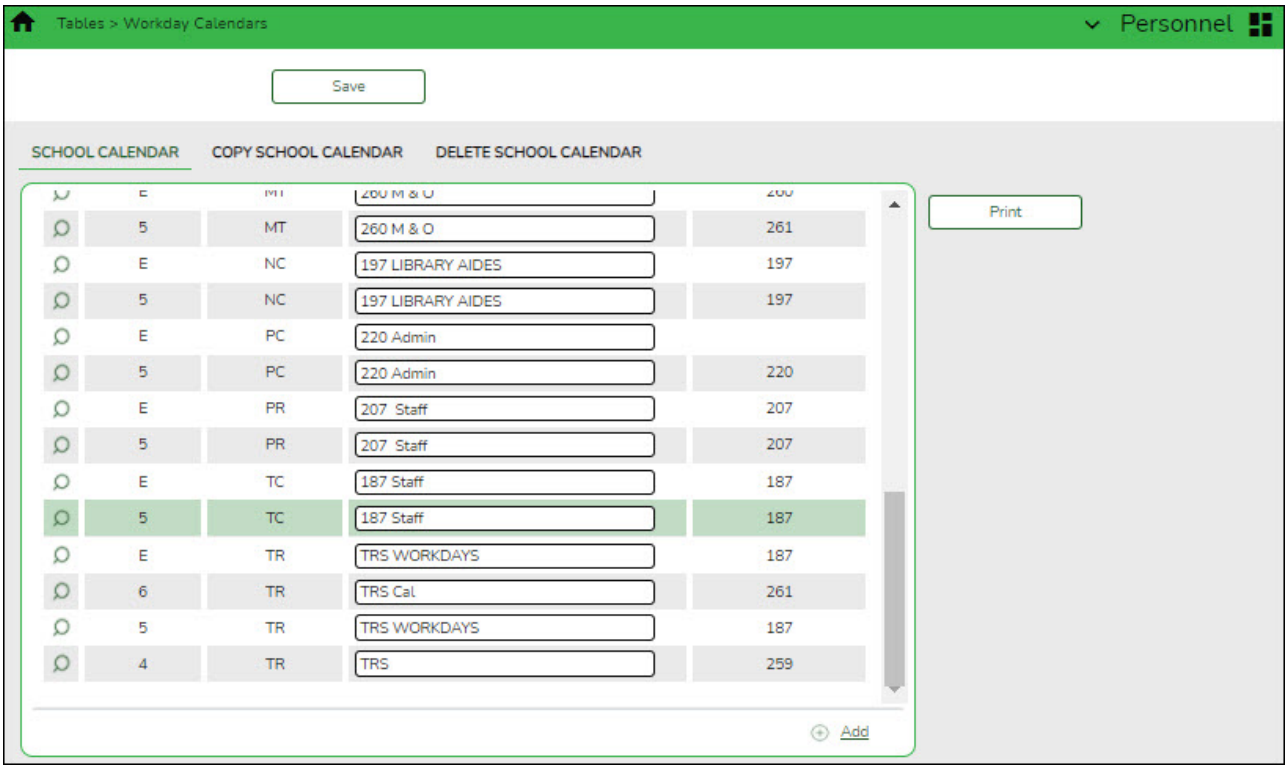
❑ Click **Save**. The **Midpoint** is automatically calculated.

3. Update school calendar.

Personnel > Tables > Workday Calendars > School Calendar

All positions must be tied to a school calendar code. Existing school calendar codes can be used. If there are positions that do not follow the existing calendar codes, you can add new calendar codes. Calendar codes can be alpha or numeric.

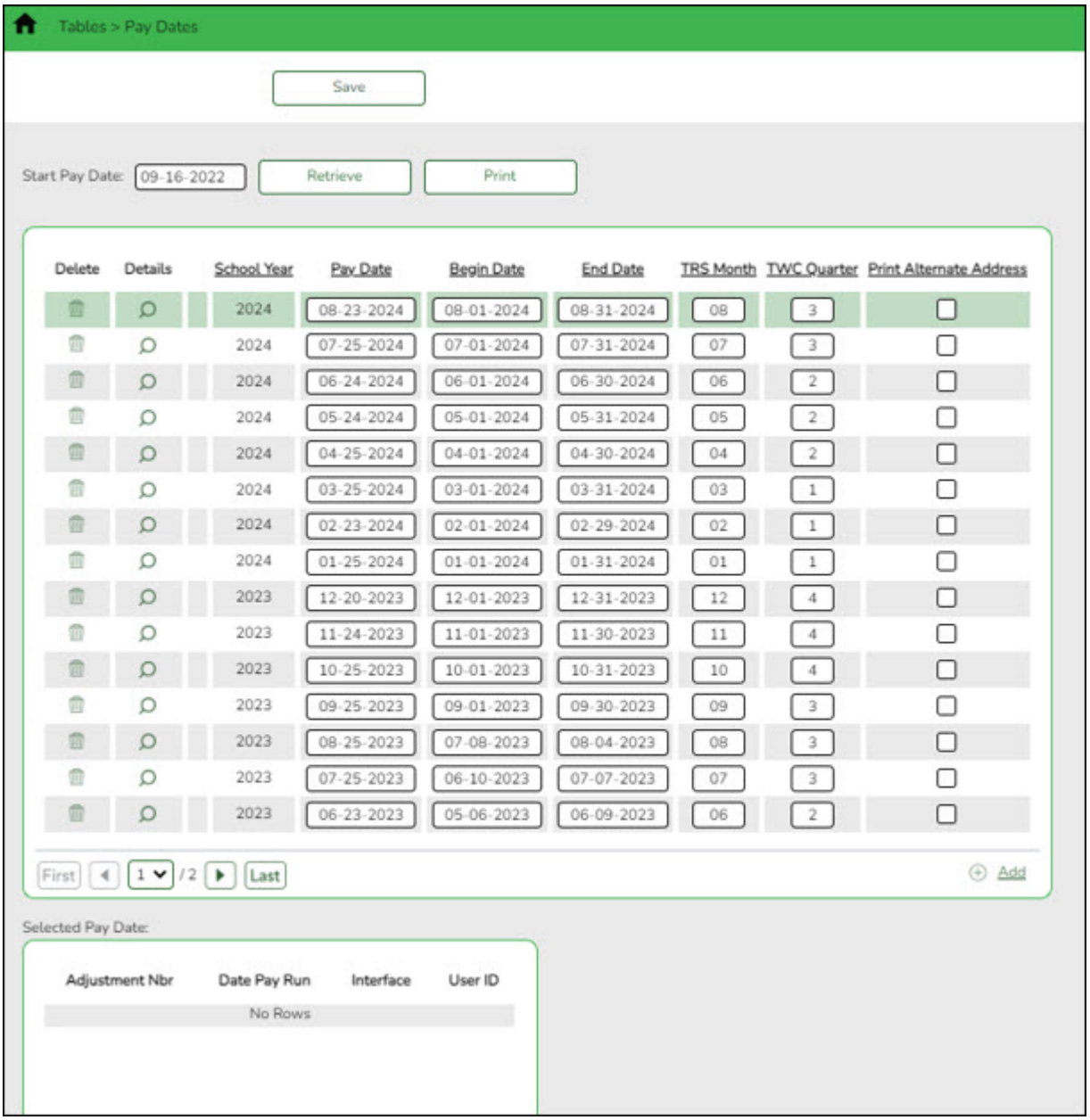
It is important that the begin and end dates match the calendar. For example, when entering the begin and end dates, many LEAs use 7/1-6/30 for 12-month employees. If 7/1 and/or 6/30 fall on a weekend and your calendar has a begin date of 7/2, then the employee's begin date should be 7/2.



4. Set up next school year pay dates.

   Payroll > Tables > Pay Dates

   Pay dates can be created for the next school year. The current year dates are used at this time, but the pay dates for the next year must be set up prior to rolling positions to the next year Position Management.

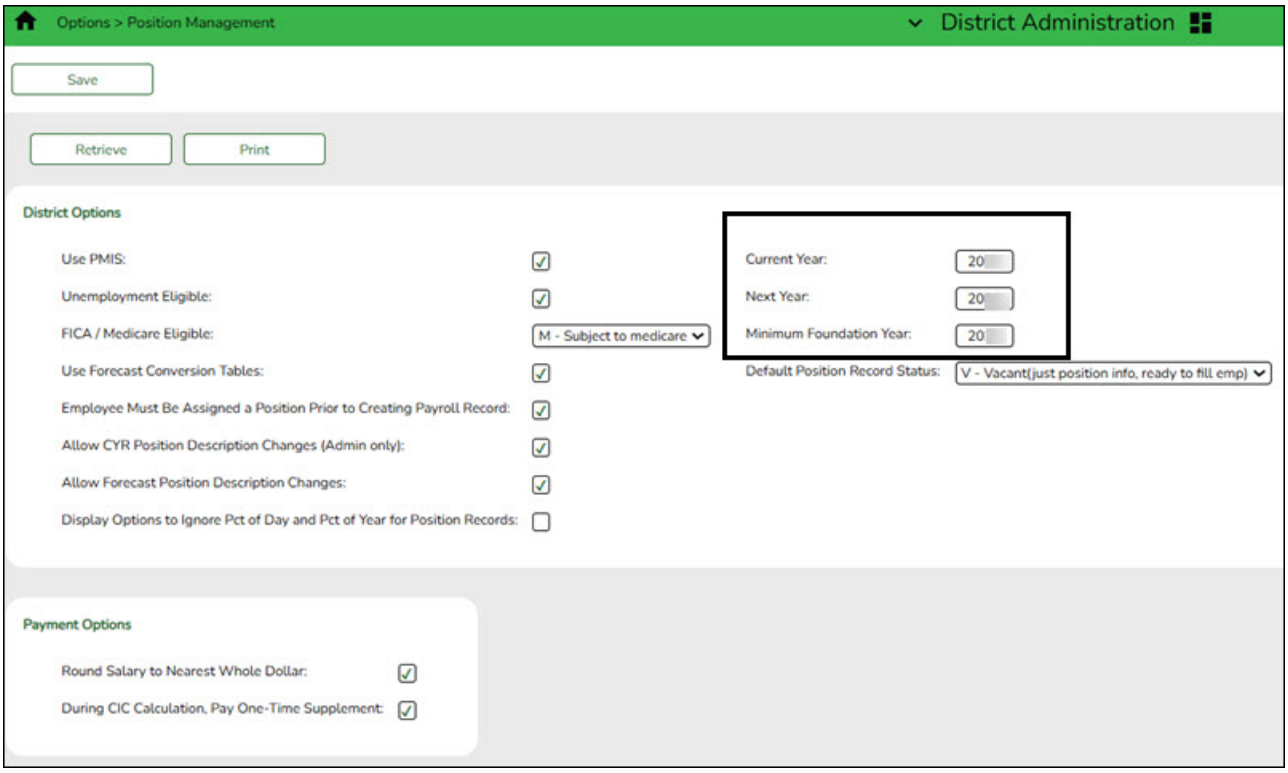


Set up District Administration Options

1. Update PMIS district options.

   District Administration > Options > Position Management

   This page is used to create and maintain Position Management options including the types of calculations that should be used in Position Management and the specified default values to be used for certain types of Position Management transactions. These options are not typically changed throughout the school year.



❑ Verify that the following fields are completed and accurate:

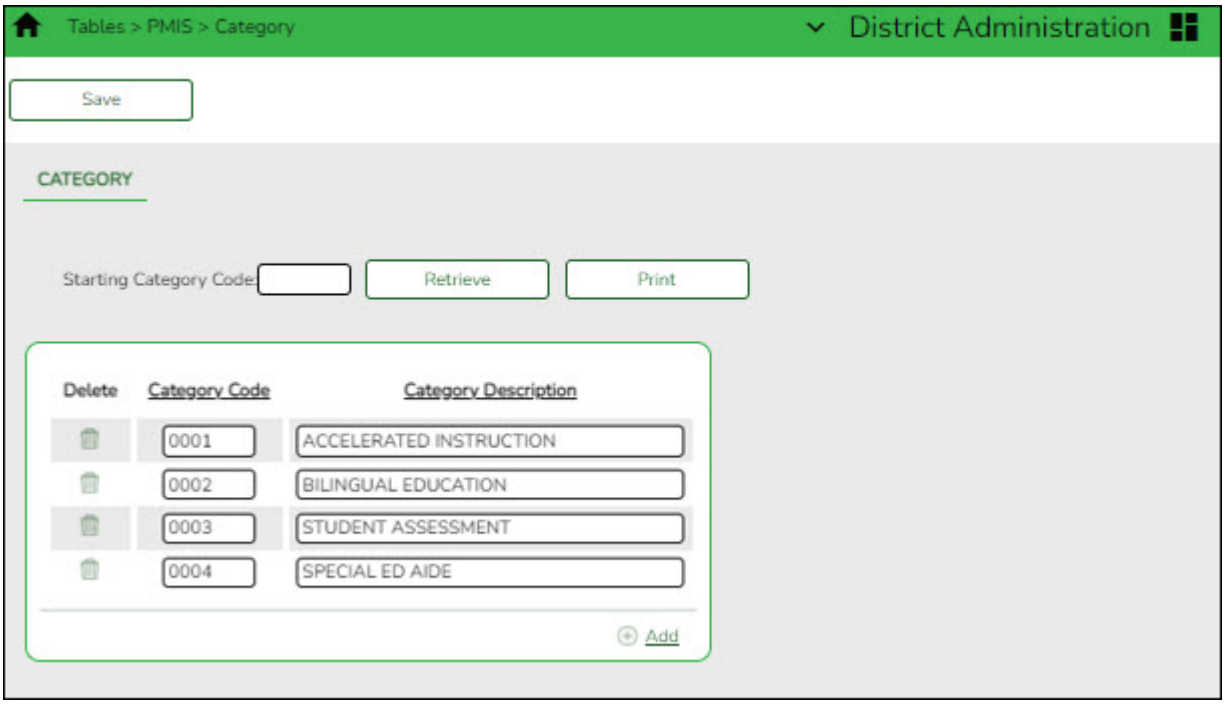
- **Current Year**
- **Next Year**
- **Minimum Foundation Year** - Type the four-digit current or next school year in the YYYY format to allow the system to select the corresponding tables to calculate the state minimum salary amount. If this year matches the current year value, the current Personnel state minimum table is used. If this year matches the next year value, the next year Personnel state minimum table is used.

2. Set up category codes.

   District Administration > Tables > PMIS > Category

   This step is optional.

   > This page is used to create and maintain a list of LEA-defined category codes to be used for Position Management. The category codes can be assigned to positions to allow for easier inquiries. There are no calculations done based on the category. The codes are strictly for Position Management and do not impact any other system. Categories can be used in User Created Reports; however, they are not available in any other report parameters.



3. Update first pay date codes.

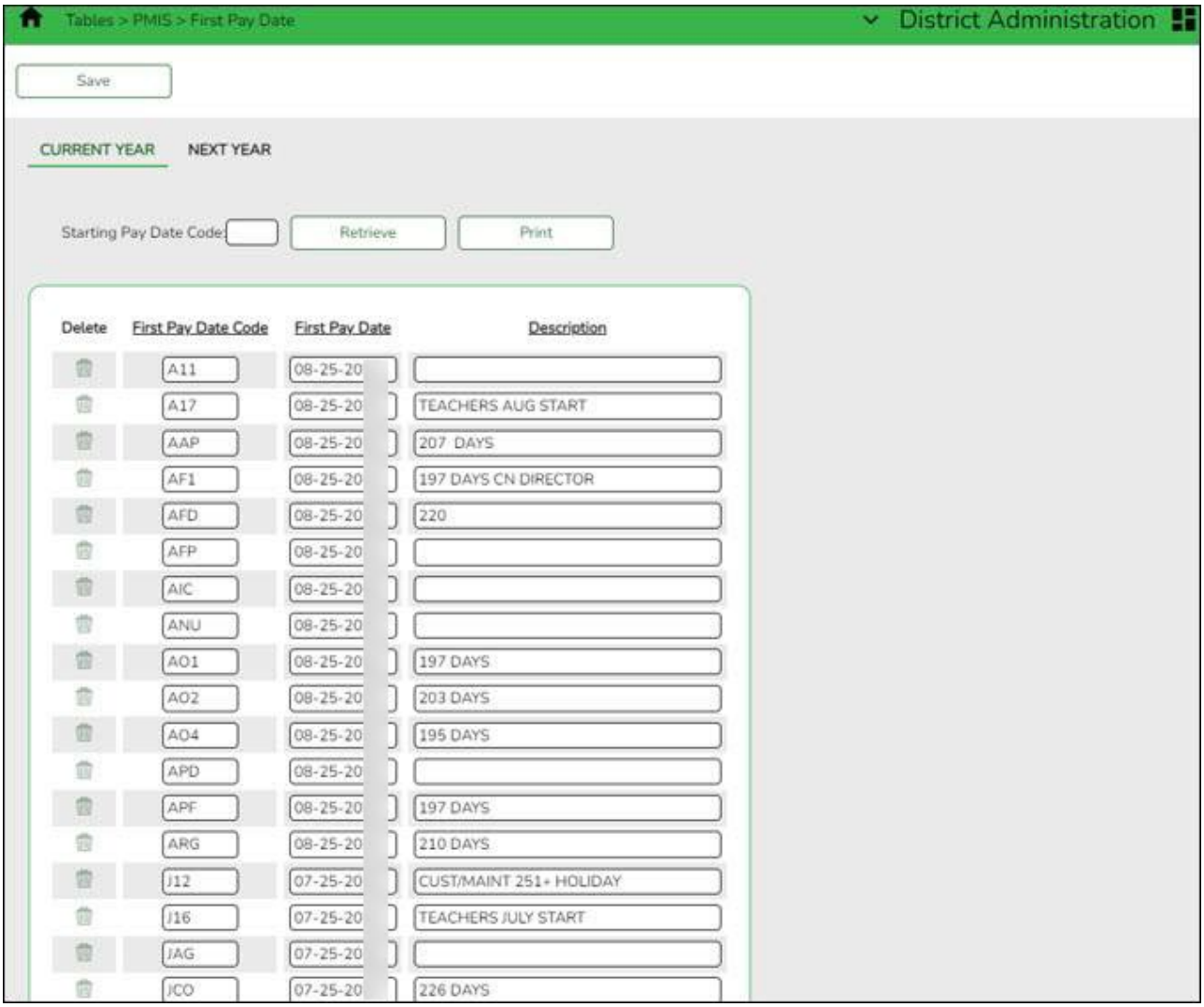
   Use the following pages to establish the current and next year first pay dates and codes.

   District Administration > Tables > PMIS > First Pay Date > Current Year

   This tab is used to create and maintain a list of codes associated with current year pay dates to be used for Position Management. The codes are used:

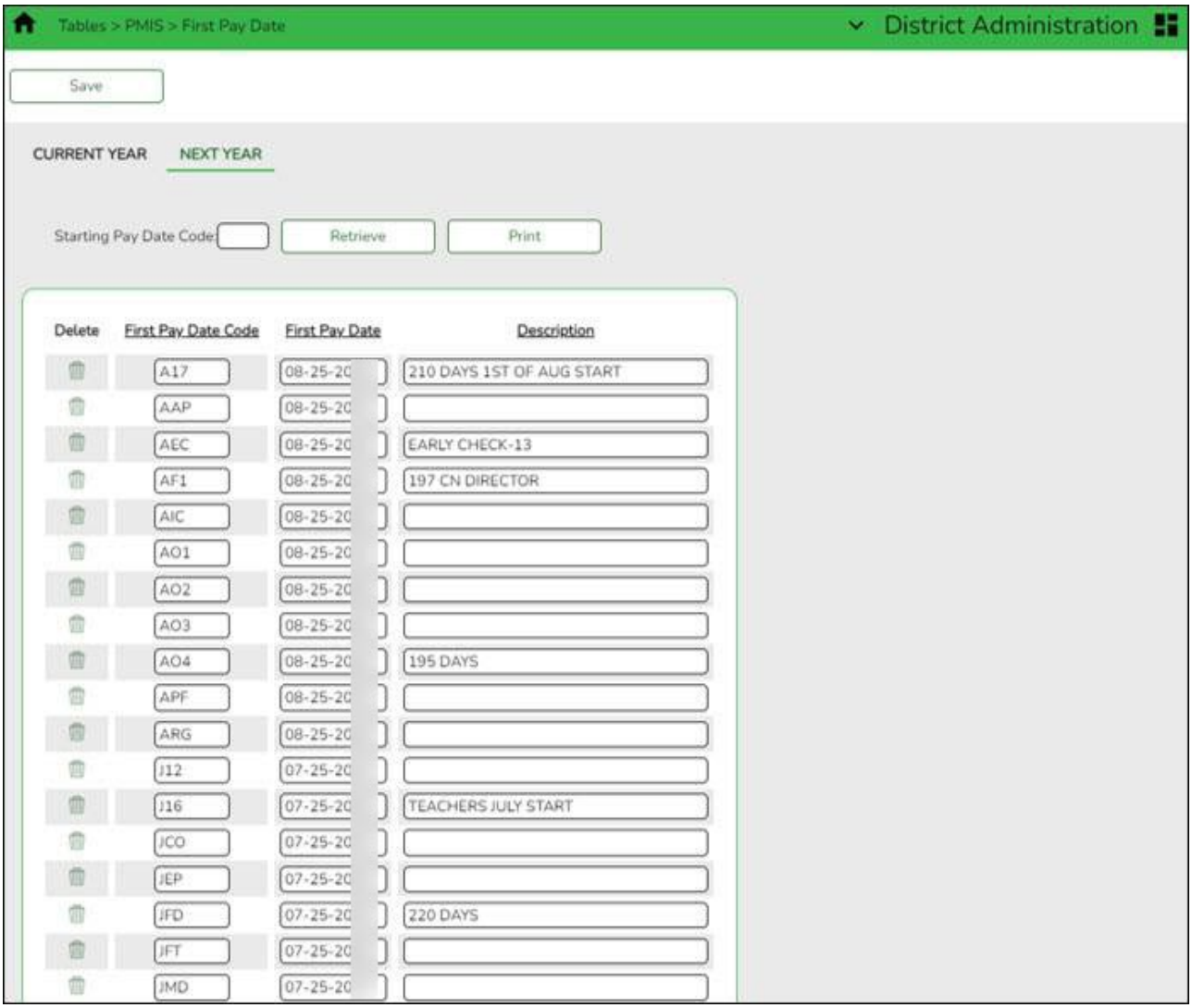
   - To establish an association between a table ID and a starting pay date.
   - To establish a start date for a new teacher so that a new teacher can be paid over 13 months.
   - To determine the first pay date of the new school year when calculating the amounts already paid to an employee.
   - To calculate the amount to be paid to an employee during the change-in-compensation processing.
   - To update the payroll data with the data in the forecast records, and to move the forecast data into the current position records.

   In this example, the first pay date codes begin with J, A, or S to represent the first pay date month (July, August, or September). The subsequent two characters represent the calendar code. Codes can be a maximum of three characters and any letters should be uppercase.



Complete the Current Year and Next Year tabs. The Current Year tab represents the first pay dates for the current school year, and the Next Year tab represents the first pay dates for the next school year.

District Administration > Tables > PMIS > First Pay Date > Next Year

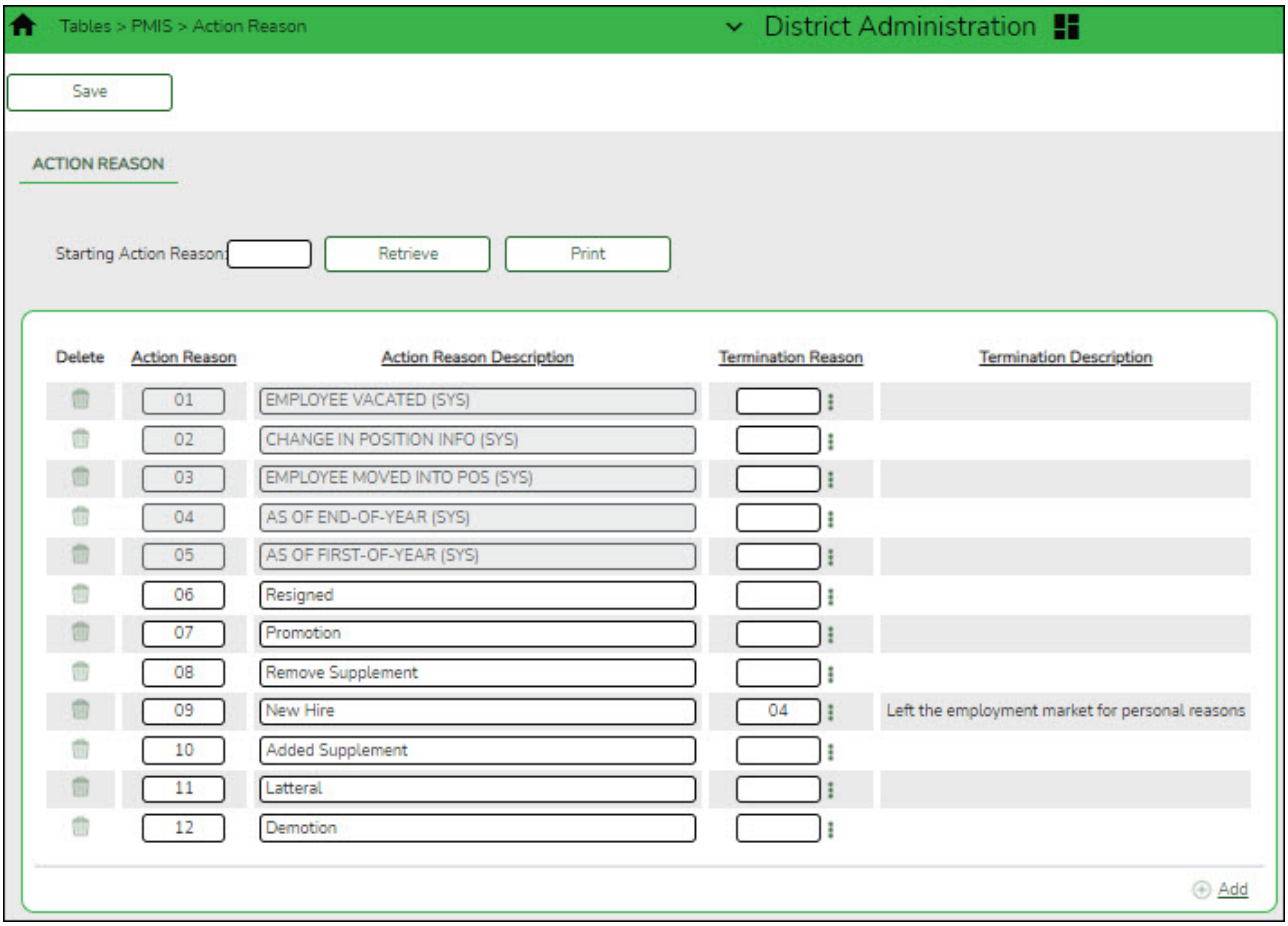


4. Set up action reason codes.

   District Administration > Tables > PMIS > Action Reason

   This page is used to create and maintain a list of action reason codes to be used for Position Management.

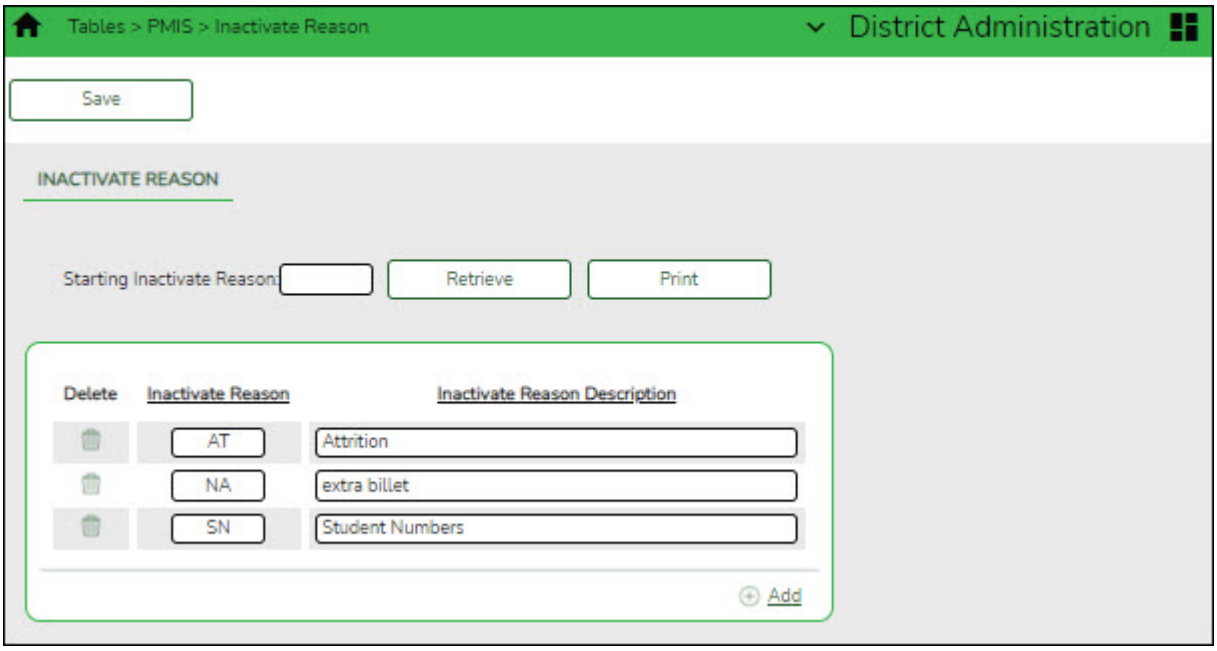
   An action code is required when a change is made to a position record that creates a historical record. Action Codes for termination transactions can be cross-referenced with the Termination Reason Codes on the Personnel > Tables > Job / Contract > Termination Reason tab. Be sure to consider LEA-required data and statistics when creating action reason codes.



5. Set up inactivate reason codes.

   District Administration > Tables > PMIS > Inactivate Reason

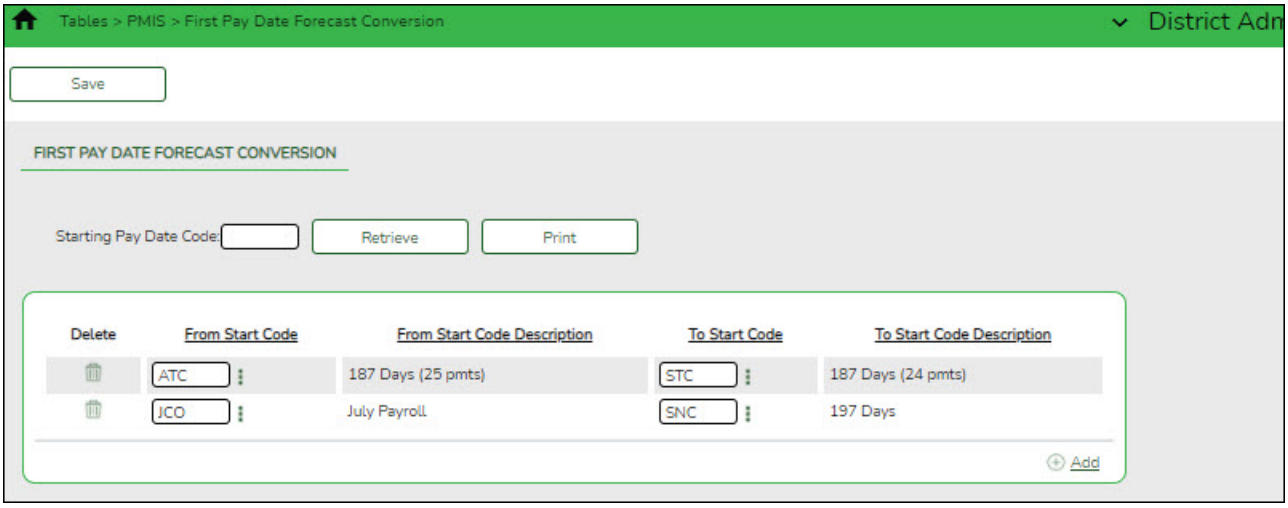
   This page is used to create and maintain a list of inactive reason codes to be used for Position Management. When a position is changed to inactive status, you are prompted to enter a reason, which is saved in the historical records.



6. Transfer positions from one first pay date code to another.

   District Administration > Tables > PMIS > First Pay Date Forecast Conversion

   This page is used to change a start date code to another for forecast conversion, and should only be used if you need to transfer all positions from one **First Pay Date Code** to a different **First Pay Date Code**. All positions tied to the **From Start Code** will be added to the **To Start Code**. For example, the program could be used to update the first pay date code when a new hire employee on a 13-month pay date cycle needs to convert to a regular 12-month pay date cycle.

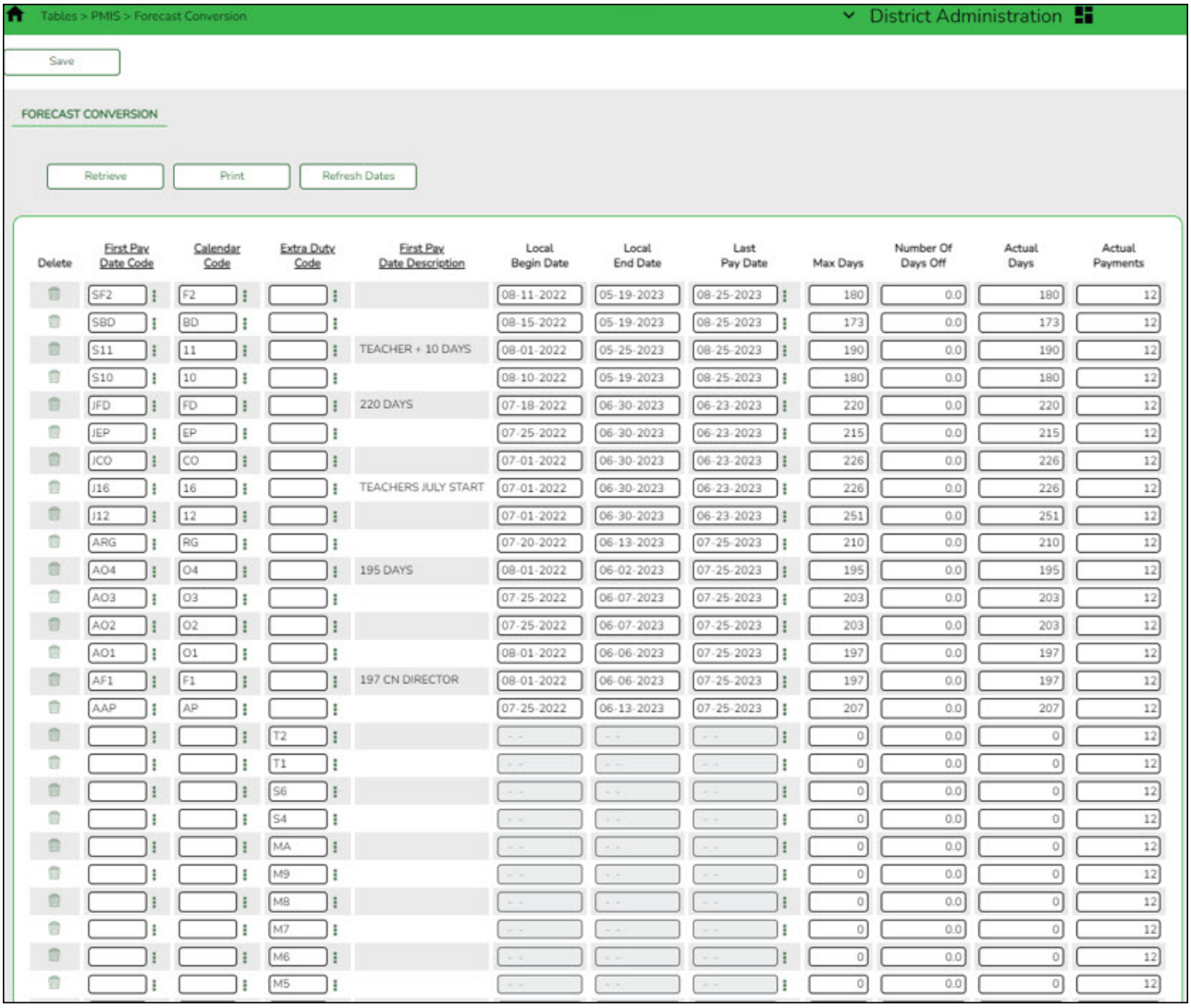


7. Update the forecast conversion data.

Prior to completing this step, the calendars and pay dates must exist in the next year payroll files.

District Administration > Tables > PMIS > Forecast Conversion

This page is used to create forecast data for the next year's records. This table maintains the data conversion information by the **First Pay Date Code** for the **Calendar Code**, **Begin Date**, **End Date**, **Payoff Date**, **Max Days**, **Number Of Days Off** and **Actual Payments**. These fields should be updated with the dates to be used for the next school year. From this data, the appropriate calendar data is located and the following calculation is performed: The **Local Begin Date** is subtracted from the **Local End Date**, and then the **Number of Days Off** is subtracted resulting in the number of **Actual Days**. This data is moved to the next year's records at the time the budget is created for the next year.



Delete	First Pay Date Code	Calendar Code	Extra Duty Code	First Pay Date Description	Local Begin Date	Local End Date	Last Pay Date	Max Days	Number Of Days Off	Actual Days	Actual Payments
	SF2	F2			08-11-2022	05-19-2023	08-25-2023	180	0.0	180	12
	SBD	BD			08-15-2022	05-19-2023	08-25-2023	173	0.0	173	12
	S11	11		TEACHER + 10 DAYS	08-01-2022	05-25-2023	08-25-2023	190	0.0	190	12
	S10	10			08-10-2022	05-19-2023	08-25-2023	180	0.0	180	12
	JFD	FD		220 DAYS	07-18-2022	06-30-2023	06-23-2023	220	0.0	220	12
	JEP	EP			07-25-2022	06-30-2023	06-23-2023	215	0.0	215	12
	JCO	CO			07-01-2022	06-30-2023	06-23-2023	226	0.0	226	12
	J16	16		TEACHERS JULY START	07-01-2022	06-30-2023	06-23-2023	226	0.0	226	12
	J12	12			07-01-2022	06-30-2023	06-23-2023	251	0.0	251	12
	ARG	RG			07-20-2022	06-13-2023	07-25-2023	210	0.0	210	12
	AO4	O4		195 DAYS	08-01-2022	06-02-2023	07-25-2023	195	0.0	195	12
	AO3	O3			07-25-2022	06-07-2023	07-25-2023	203	0.0	203	12
	AO2	O2			07-25-2022	06-07-2023	07-25-2023	203	0.0	203	12
	AO1	O1			08-01-2022	06-06-2023	07-25-2023	197	0.0	197	12
	AF1	F1		197 CN DIRECTOR	08-01-2022	06-06-2023	07-25-2023	197	0.0	197	12
	AAP	AP			07-25-2022	06-13-2023	07-25-2023	207	0.0	207	12
			T2					0	0.0	0	12
			T1					0	0.0	0	12
			S6					0	0.0	0	12
			S4					0	0.0	0	12
			MA					0	0.0	0	12
			M9					0	0.0	0	12
			M8					0	0.0	0	12
			M7					0	0.0	0	12
			M6					0	0.0	0	12
			M5					0	0.0	0	12

For each pay date code, complete the fields on the page. The next year begin and end dates must match the new calendars in the next year payroll files, and the payoff dates must exist in

the pay dates table for each first pay date code.

This process updates the table and replaces the mass updating process that is done in the next year payroll.

The **Days Off** field is used to reduce the days worked without tying back to unavailable days on a calendar. For example, a district police officer may work every day (or have the potential to work every day) but may have a certain number of days off per year that can be taken at any time.

Import Position and Distribution Data

1. Import checklists.

   After the setup steps are completed, use the following checklists to import position and distribution data.

   Import Position Data to PMIS Checklist (prints separately)

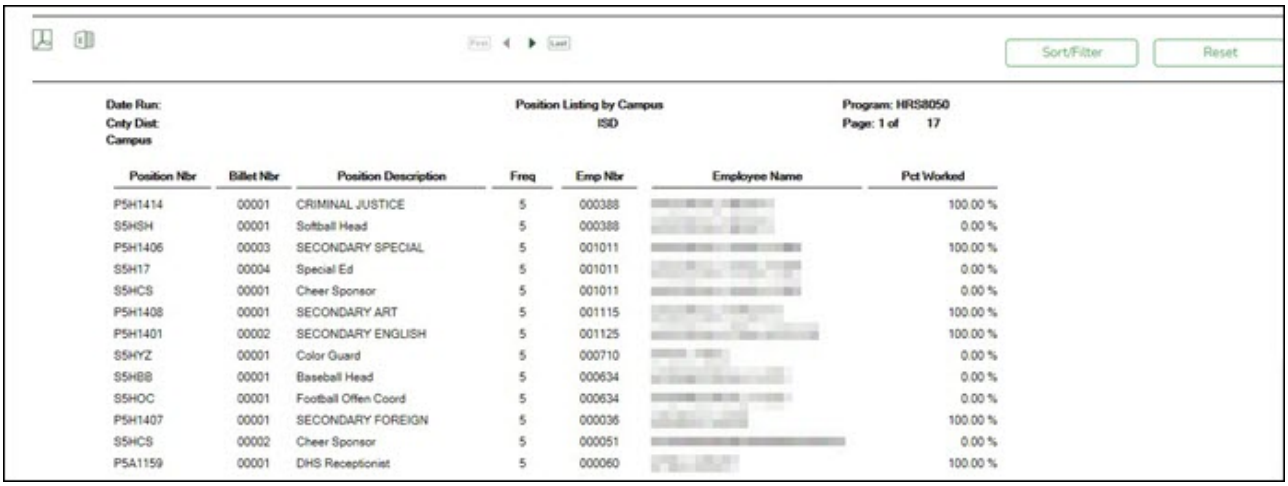
   Import Distribution Data to PMIS Checklist (prints separately)

2. Verify imported data.

   Use the following reports to verify that the records were correctly imported to the current year Position Management.

   ❑ Generate the Position Management > Reports > PMIS Reports > HRS8050 - Position Listing by Campus report to verify that all positions exist with accurate information.

   The report provides a list of all positions within a campus. The report is sorted by campus number and includes each job position along with a position number, billet number, description, employee number, employee name, percentage of day worked, and pay frequency.



Sort/Filter Reset

Date Run:
Cnty Dist:
Campus

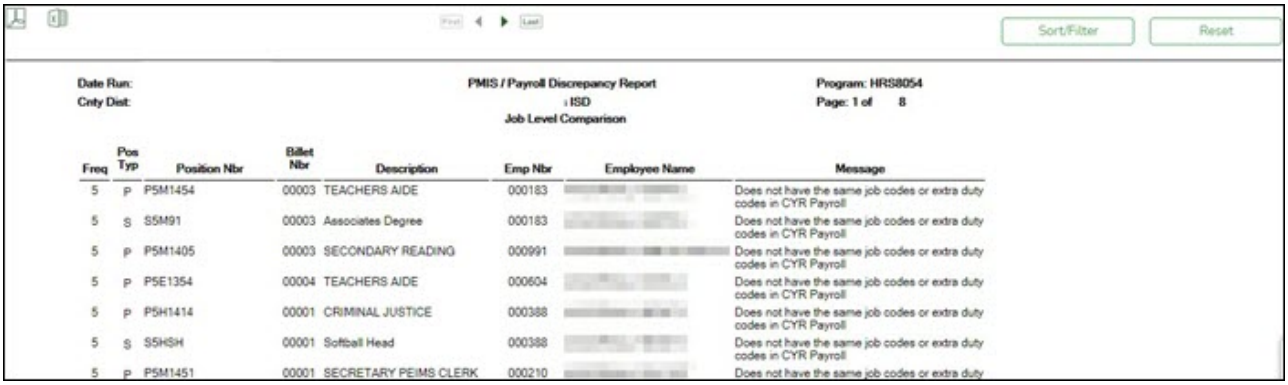
Position Listing by Campus
ISD

Program: HRS8050
Page: 1 of 17

Position Nbr	Billet Nbr	Position Description	Freq	Emp Nbr	Employee Name	Pct Worked
P5H1414	00001	CRIMINAL JUSTICE	5	000388		100.00 %
S5HSH	00001	Softball Head	5	000388		0.00 %
P5H1406	00003	SECONDARY SPECIAL	5	001011		100.00 %
S5H17	00004	Special Ed	5	001011		0.00 %
S5HCS	00001	Cheer Sponsor	5	001011		0.00 %
P5H1408	00001	SECONDARY ART	5	001115		100.00 %
P5H1401	00002	SECONDARY ENGLISH	5	001125		100.00 %
S5HYZ	00001	Color Guard	5	000710		0.00 %
S5HBB	00001	Baseball Head	5	000634		0.00 %
S5HOC	00001	Football Offen Coord	5	000634		0.00 %
P5H1407	00001	SECONDARY FOREIGN	5	000036		100.00 %
S5HCS	00002	Cheer Sponsor	5	000051		0.00 %
P5A1159	00001	DHS Receptionist	5	000060		100.00 %

❑ Generate the Position Management > Reports > PMIS Reports > HRS8054 - PMIS/Payroll Discrepancy Report to verify that there are no discrepancies.

The report allows you to print a list of all positions that do not have payroll records or a list of payroll records that do not have position management records.



Sort/Filter Reset

Date Run:
Cnty Dist:

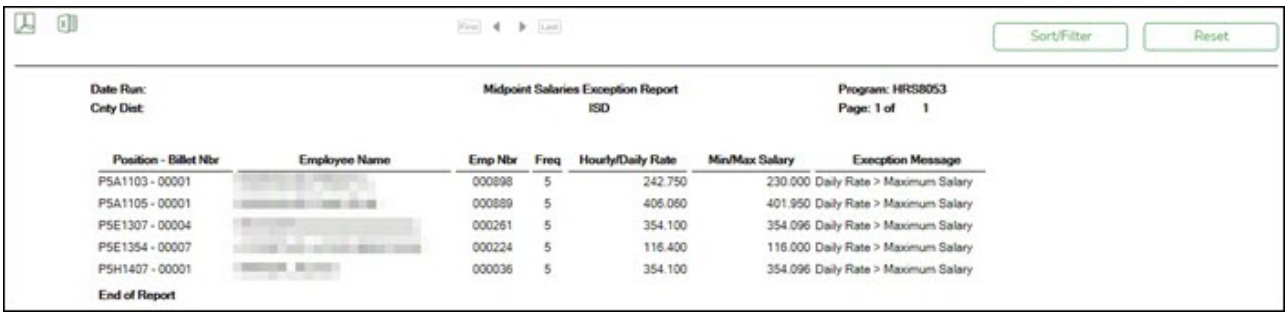
PMIS / Payroll Discrepancy Report
ISD
Job Level Comparison

Program: HRS8054
Page: 1 of 8

Freq	Pos Typ	Position Nbr	Billet Nbr	Description	Emp Nbr	Employee Name	Message
5	P	P5M1454	00003	TEACHERS AIDE	000183		Does not have the same job codes or extra duty codes in CYR Payroll
5	S	S5M91	00003	Associates Degree	000183		Does not have the same job codes or extra duty codes in CYR Payroll
5	P	P5M1405	00003	SECONDARY READING	000991		Does not have the same job codes or extra duty codes in CYR Payroll
5	P	P5E1354	00004	TEACHERS AIDE	000604		Does not have the same job codes or extra duty codes in CYR Payroll
5	P	P5H1414	00001	CRIMINAL JUSTICE	000388		Does not have the same job codes or extra duty codes in CYR Payroll
5	S	S5HSH	00001	Softball Head	000388		Does not have the same job codes or extra duty codes in CYR Payroll
5	P	P5M1451	00001	SECRETARY PEIMS CLERK	000210		Does not have the same job codes or extra duty

❑ Generate the Position Management > Reports > PMIS Reports > HRS8053 - Midpoint Salaries Exception Report if your LEA uses midpoint.

This report provides a list of positions that have salary rates that are not within the minimum and maximum salary ranges.



Sort/Filter Reset

Date Run:
Cnty Dist:

Midpoint Salaries Exception Report
ISD

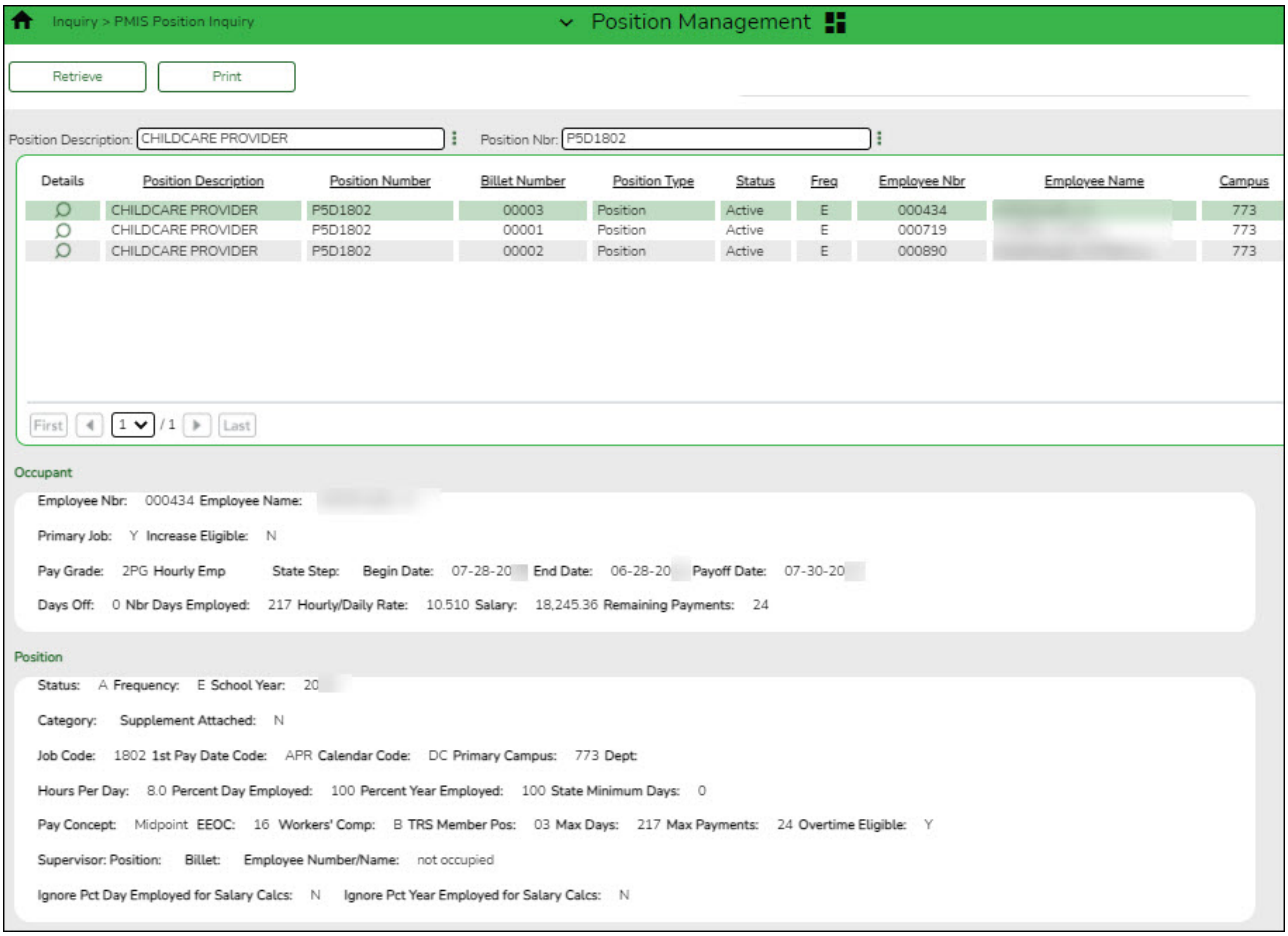
Program: HRS8053
Page: 1 of 1

Position - Billet Nbr	Employee Name	Emp Nbr	Freq	Hourly/Daily Rate	Min/Max Salary	Exception Message
P5A1103 - 00001		000898	5	242.750	230.000	Daily Rate > Maximum Salary
P5A1105 - 00001		000889	5	406.060	401.950	Daily Rate > Maximum Salary
P5E1307 - 00004		000261	5	354.100	354.096	Daily Rate > Maximum Salary
P5E1354 - 00007		000224	5	116.400	116.000	Daily Rate > Maximum Salary
P5H1407 - 00001		000036	5	354.100	354.096	Daily Rate > Maximum Salary

End of Report

❑ For additional information, use the Position Management > Inquiry > PMIS Position Inquiry

page to perform a position inquiry.

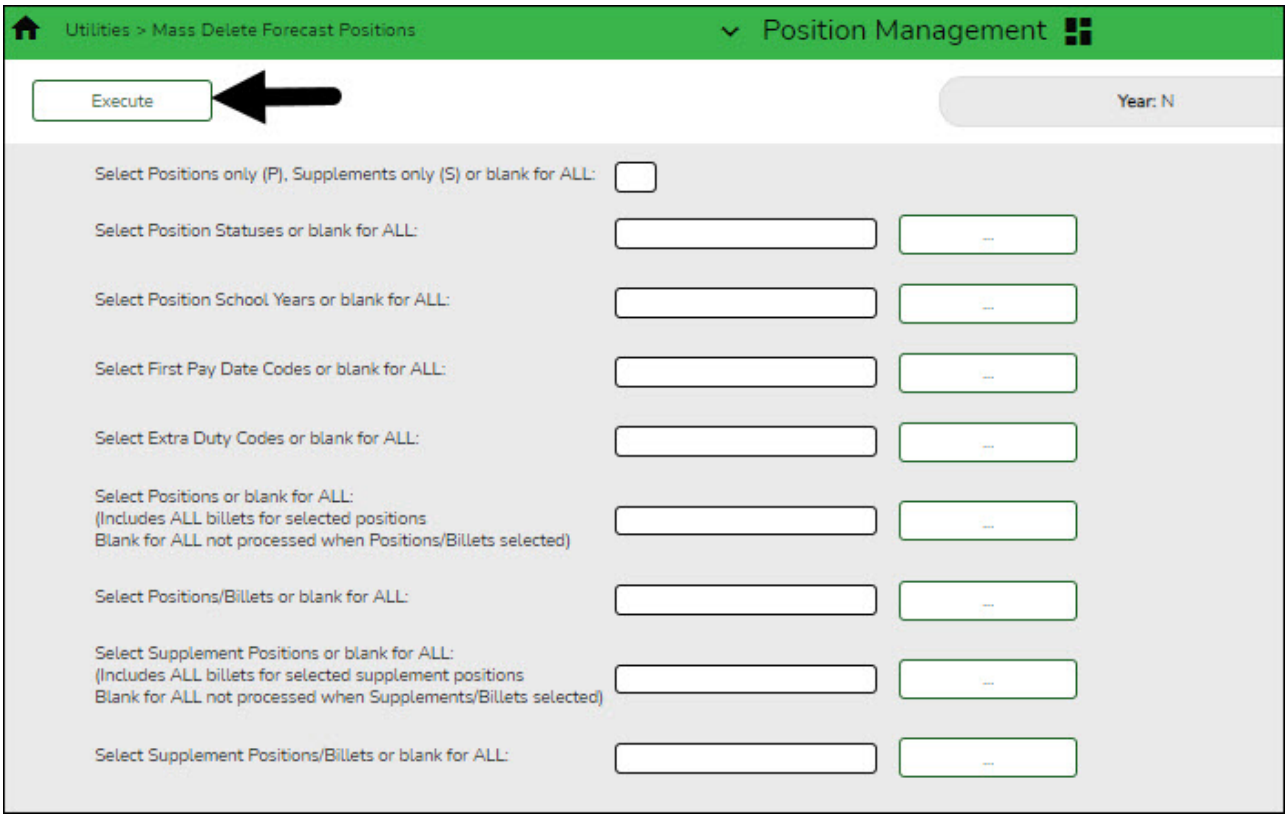


Perform PMIS Maintenance

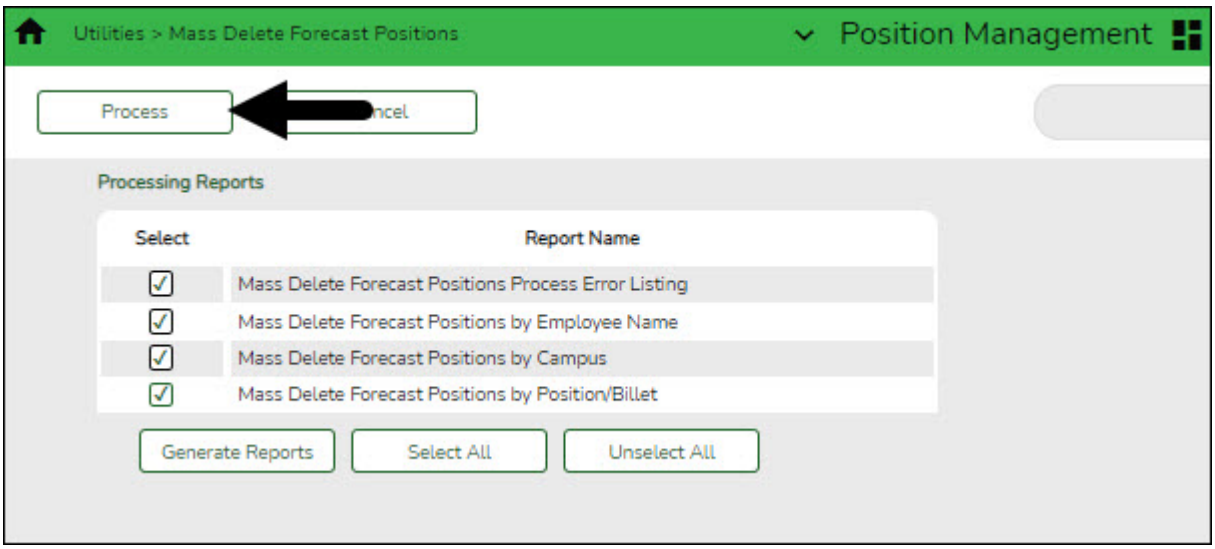
Log on to the next year.

1. Delete next year PMIS.

   Position Management > Utilities > Mass Delete Forecast Positions



❑ Leave all fields blank and click **Execute**. A list of processing reports is displayed.

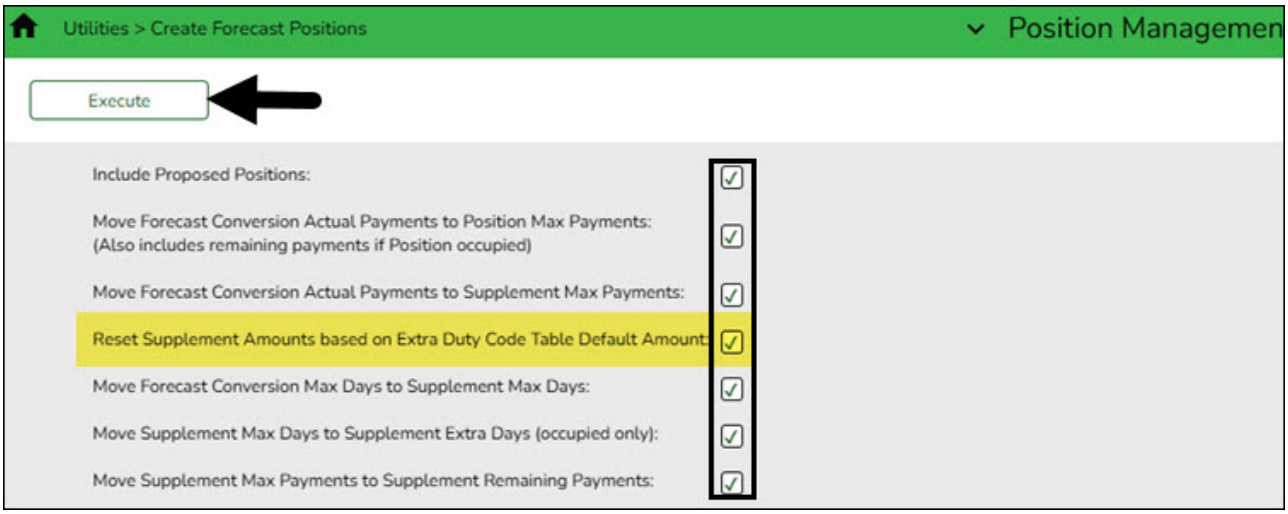


❑ Select the reports to generate, and print or save the reports.

❑ Click **Process** to delete the forecast records. You are prompted to create a backup.

2. Copy current year positions to the next year.

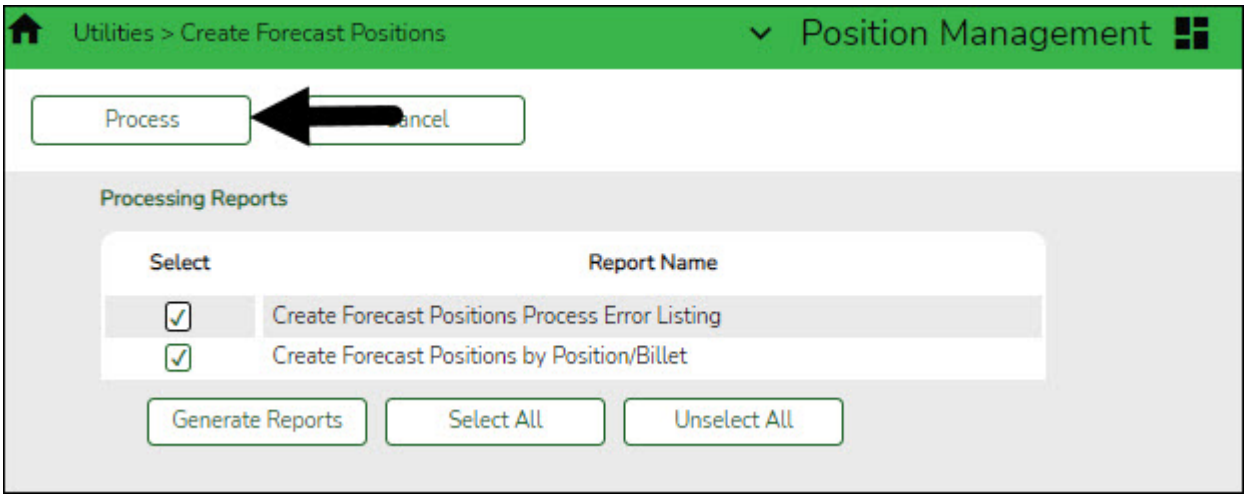
   Position Management > Utilities > Create Forecast Positions



If an LEA has the **Percent of Year** field set to less than 100% of the stipend amount on the Position Management > Maintenance > PMIS Supplement Modify > Position Record tab, they should consider whether or not to select the **Reset Supplement Amounts based on Extra Duty Code Table Default Amount** field.

If the **Reset Supplement Amounts based on Extra Duty Code Table Default Amount** field is selected, the amount on the supplement position record is reset to match the amount on the extra duty table.

❑ Select all fields and click **Execute**. A list of processing reports is displayed.



❑ Select the reports to generate and print or save the reports. Verify any errors and make corrections as needed.

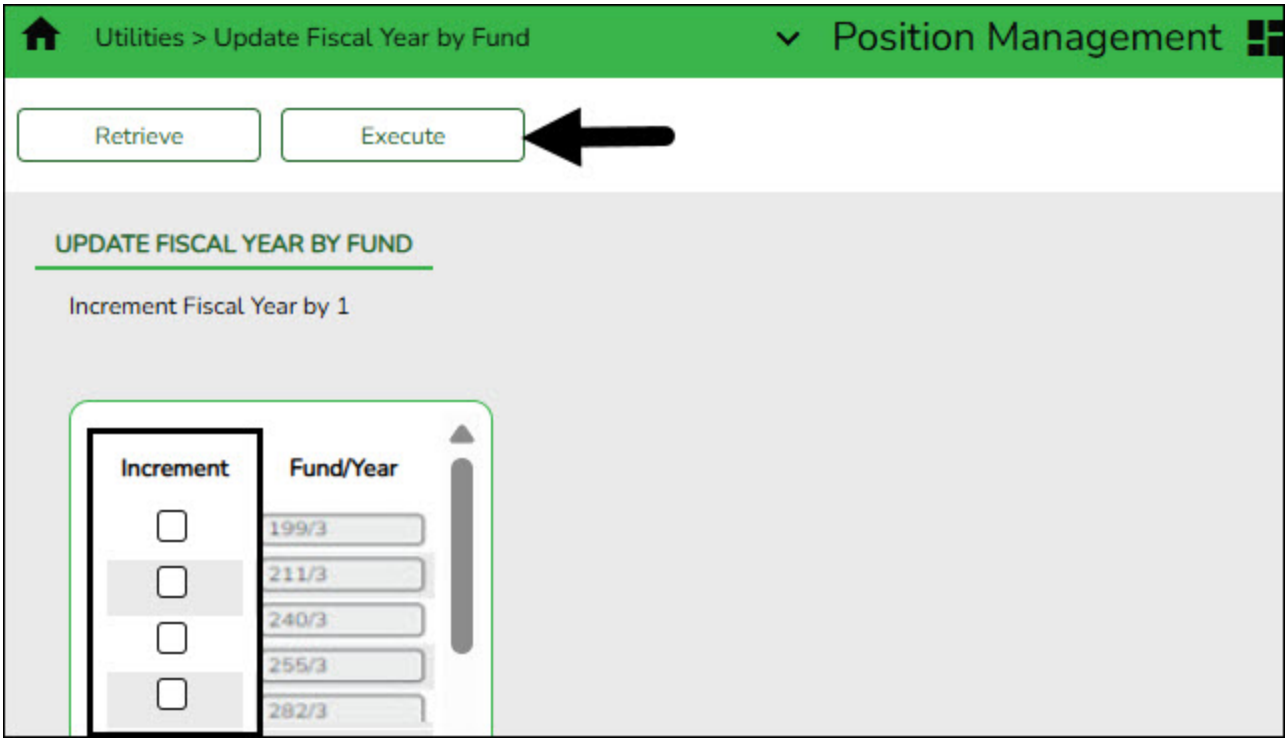
❑ Click **Process**. You are prompted to create a backup.

3. Update the fiscal year for distributions.

Prior to completing this step, verify that the new year budget is initialized in ASCENDER.

Position Management > Utilities > Update Fiscal Year by Fund

❑ Select the fund/years to be incremented. This process increments the position distribution fiscal year by 1.



❑ Click **Execute**.

4. Generate the Position Listing by Campus Report.

   Position Management > Reports > PMIS Reports > HRS8050 - Position Listing by Campus

   Generate the Position Listing by Campus Report from next year Position Management to determine the following:

   - If any employees need to be moved to a different position.
   - If you have vacant positions you need to update with employee information.
   - If you have any supplemental positions that need to be updated for stipends.

Date Run:
Cnty Dist:
Campus

Position Listing by Campus
ISD

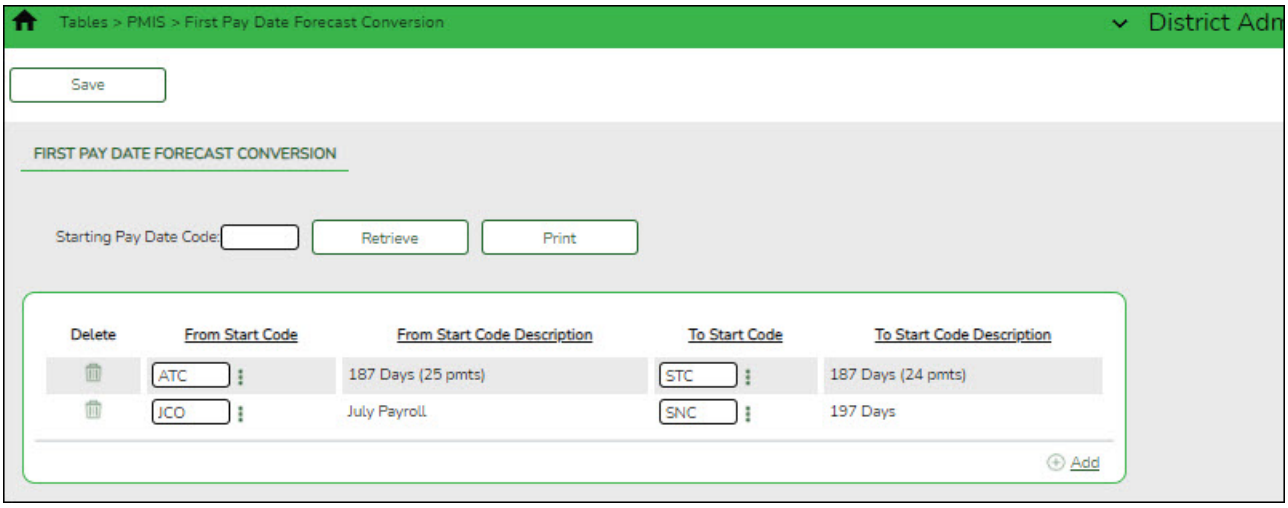
Program: HRS8050
Page: 1 of 11

Position	Billit Nbr	Position Description	Freq	Emp Nbr	Employee Name	Pct Worked
EXTRADUTY	00002	FROZEN CARRYOVER	6	000026		0.00 %
PTEACHER	00205	ENGLISH	6	000026		100.00 %
ATHLETICS	00015	BASKETBALL ASST	6	000027		0.00 %
ATHLETICS	00098	TRACK ASST	6	000027		0.00 %
ATHLETICS	00113	VOLLEYBALL ASST	6	000027		0.00 %
EXTRADUTY	00005	FROZEN CARRYOVER	6	000034		0.00 %
EXTRADUTY	00006	FROZEN CARRYOVER	6	000041		0.00 %
PTEACHER	00606	SOCIAL STUDIES	6	000041		100.00 %
PCAMPUS	00114	AIDE	6	000048		100.00 %

5. (If necessary) Transfer positions from one first pay date code to another.

   District Administration > Tables > PMIS > First Pay Date Forecast Conversion

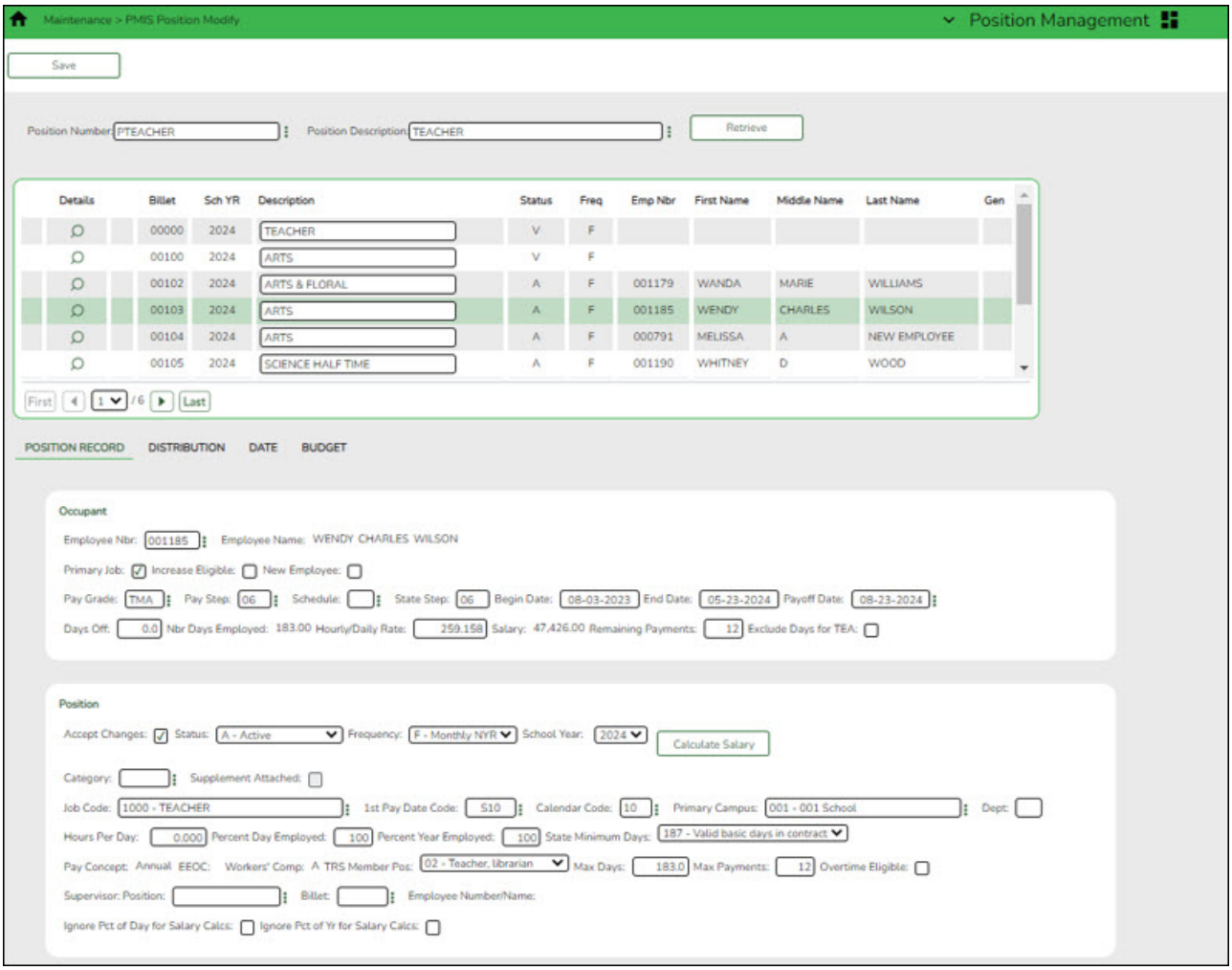
   This page is used to change a start date code to another for forecast conversion, and should only be used if you need to transfer all positions from one **First Pay Date Code** to a different **First Pay Date Code**. All positions tied to the **From Start Code** will be added to the **To Start Code**. For example, the program could be used to update the first pay date code when a new hire employee on a 13-month pay date cycle needs to convert to a regular 12-month pay date cycle.



6. (If necessary) Update regular and supplemental positions.

   Note: If your LEA comes across a situation where teachers are not being captured in the ASCENDER Student system for grade reporting or scheduling, contact your regional ESC consultant for guidance.

Position Management > Maintenance > PMIS Position Modify or PMIS Supplement Modify

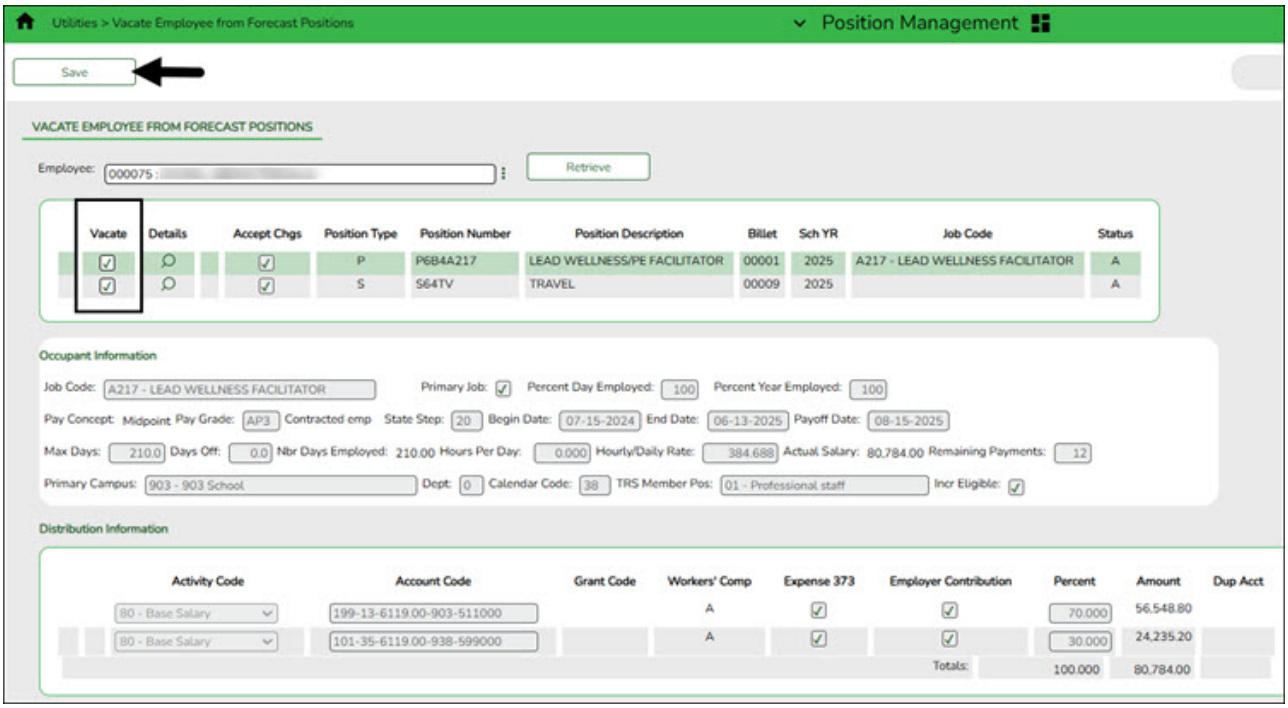


If working on the Distribution tab, you must select an account code from the autosuggest drop down in the **Account Code** field versus typing in the full account code in order to validate against the grant code table.

If necessary, use one of the following options to vacate an employee from a position:

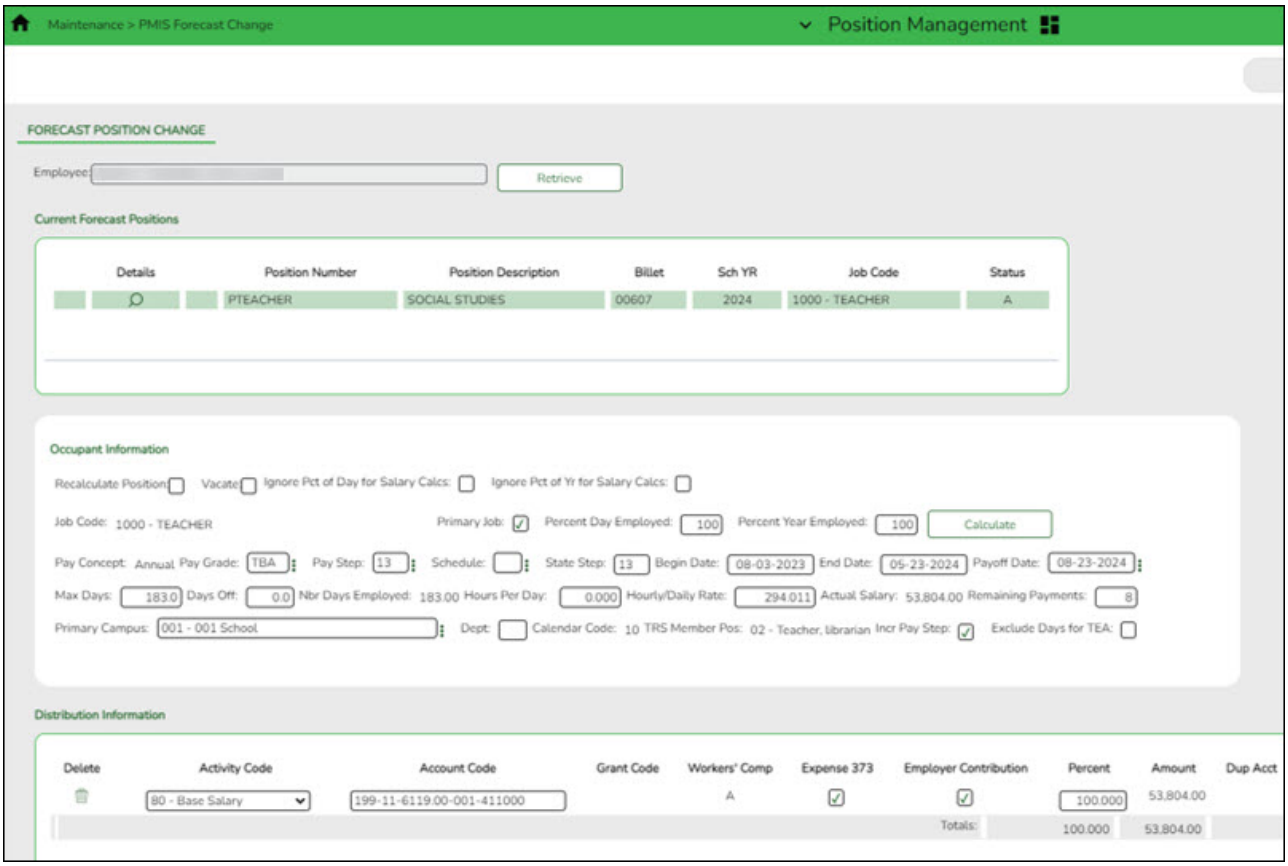
❑ **Option 1**: It is best practice to use the Position Management > Utilities > Vacate Employee from Forecast Positions page to vacate a position.

Typically, when an employee decides to leave the LEA at the end of the year, the employee is paid off in payroll at the end of their contract; therefore, no additional action is necessary for the current year. However, in the forecast records, the employee must be removed from all existing positions.



- Retrieve the employee's position record.
- Select the **Vacate** check box for each position.
- Click **Save**.

❑ **Option 2**: Use the Position Management > Maintenance > PMIS Forecast Change page (only available in the next year payroll) to change an employee from one position to another. A list of the employee's existing positions is displayed with a section to either enter a new position or vacate a position.



7. Generate the PMIS/Payroll Discrepancy Report.

   Position Management > Reports > PMIS Reports > HRS8054 - PMIS/Payroll Discrepancy Report

   Generate the PMIS/Payroll Discrepancy report to determine if there are any active employees not assigned to a forecast position. Below are some examples of the PMIS/Payroll Discrepancy report:

Date Run:
Cnty Dist:

PMIS / Payroll Discrepancy Report
ISD
Job Level Comparison

Program: HRS8054
Page: 1 of 9

Freq	Pos Typ	Position Nbr	Billet Nbr	Description	Emp Nbr	Employee Name	Message
E	P	P5A1102	00001	ADMINISTRATIVE	000180		Does not have the same job codes or extra duty codes in CYR Payroll
E	P	P5A1103	00001	DIR OF TECHNOLOGY	000898		Does not have the same job codes or extra duty codes in CYR Payroll
E	P	P5A1104	00001	TRANSPORTATION COORD	000148		Does not have the same job codes or extra duty codes in CYR Payroll
E	P	P5A1105	00001	BUSINESS MANAGER	000889		Does not have the same job codes or extra duty codes in CYR Payroll
E	P	P5A1106	00001	DIRECTOR ATHLETICS	000906		Does not have the same job codes or extra duty codes in CYR Payroll
E	P	P5A1107	00001	PEIMS COORDINATOR	000128		Does not have the same job codes or extra duty codes in CYR Payroll
E	P	P5A1110	00001	FACILITIES DIRECTOR	000872		Does not have the same job codes or extra duty

Date Run:
Cnty Dist:

PMIS / Payroll Discrepancy Report
ISD
Employee Level Comparison

Program: HRS8054
Page: 1 of 1

Freq	Pos Typ	Position Nbr	Billet Nbr	Description	Emp Nbr	Employee Name	Message
F	P	PCAMPUS	00300	PRINCIPAL	000012	ADKINS, ALEXANDER LYNN	Inactive in CYR Payroll
6					001140	BUSMGR, IMA	Active emp not assigned to Forecast Position
6					000831	POER, PACER P	Active emp not assigned to Forecast Position
6					001096	WHARTON, TYLAR DENAA	Active emp not assigned to Forecast Position
6					001120	WILLIAMS, WENDI IRENE	Active emp not assigned to Forecast Position
6					001134	WYNN, WYOMING	Active emp not assigned to Forecast Position
6					001135	YARBROUGH, ZACHARY KAY	Active emp not assigned to Forecast Position
6					001136	YOUNG, ZEB MARTIN	Active emp not assigned to Forecast Position
6					001138	ZAPATA, ZONA ASHLYN	Active emp not assigned to Forecast Position

Total Number of Employees 9

End of Report

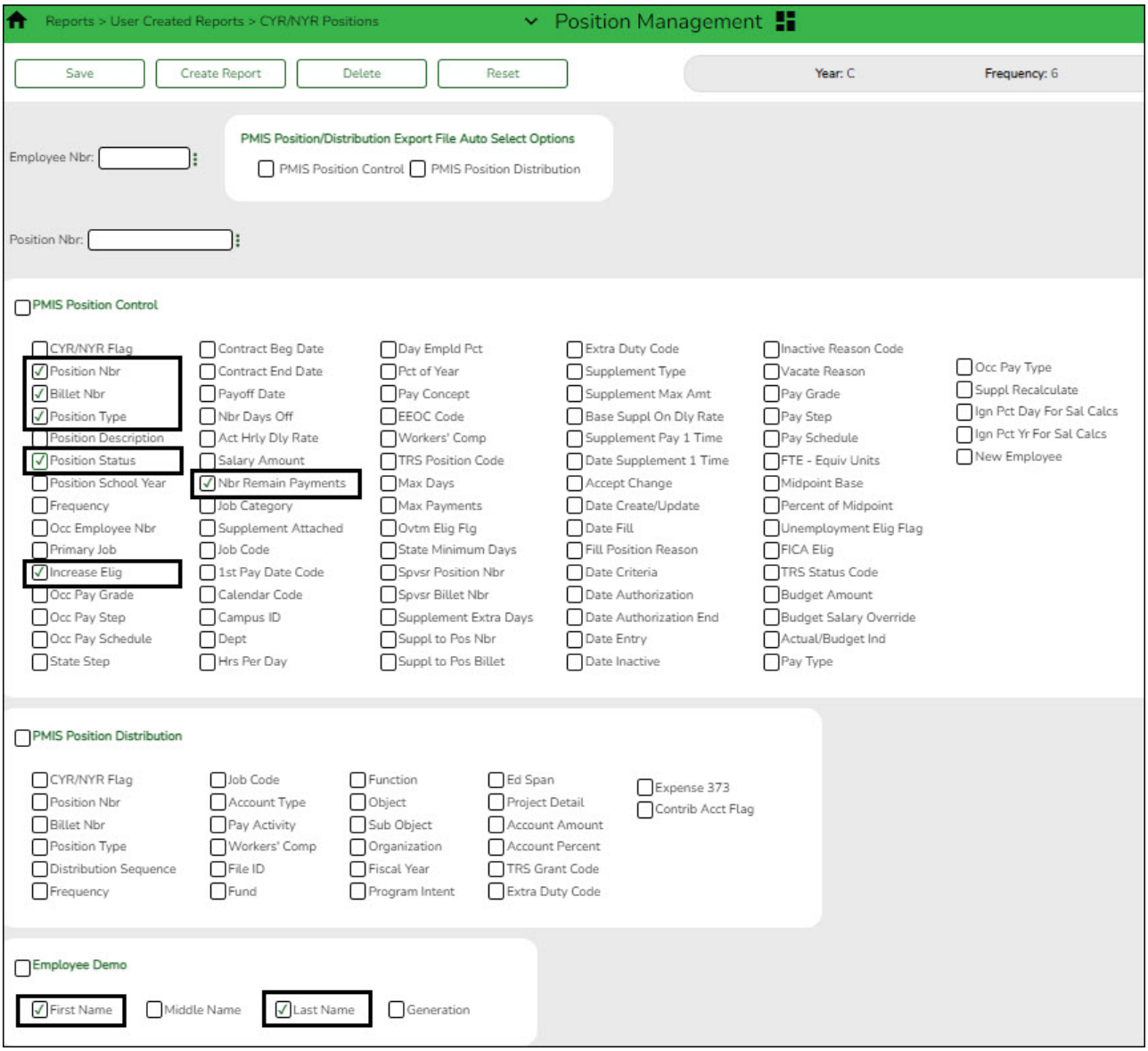
8. Generate a user-created report.

   Position Management > Reports > User Created Reports > CYR/NYR Positions

   Generate a PMIS user-created report to verify that the **Increase Eligible** field is selected for applicable positions. It is possible that the field is not selected for new LEA employees from last year.

   ❑ **It is recommended** to verify the **Nbr Remain Payments** field prior to calculating salaries.

   ❑ Select the following fields on the user-created report:



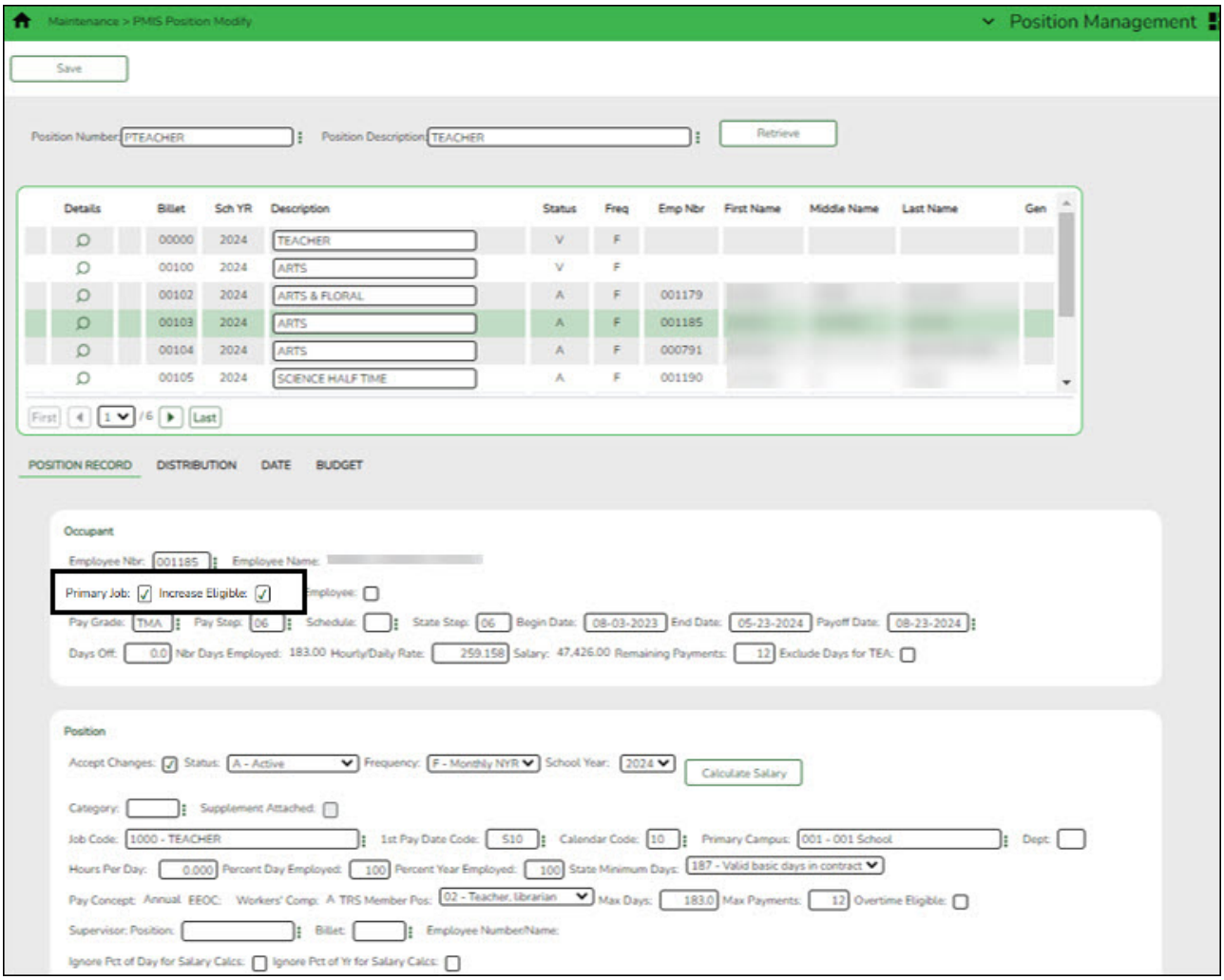
❑ Click **Create Report**. The report is displayed. Use the sort/filter functionality to group the applicable data.

> **Note**: The number of remaining payments reflected on the report is displayed on the Job Info tab as the number of annual payments and the number of remaining payments for the employee for any P position type. If the LEA uses S acct types or business allowances for extra duties, S position types on this report should reflect the correct number of remaining payments. Prior to continuing, make the necessary position corrections.

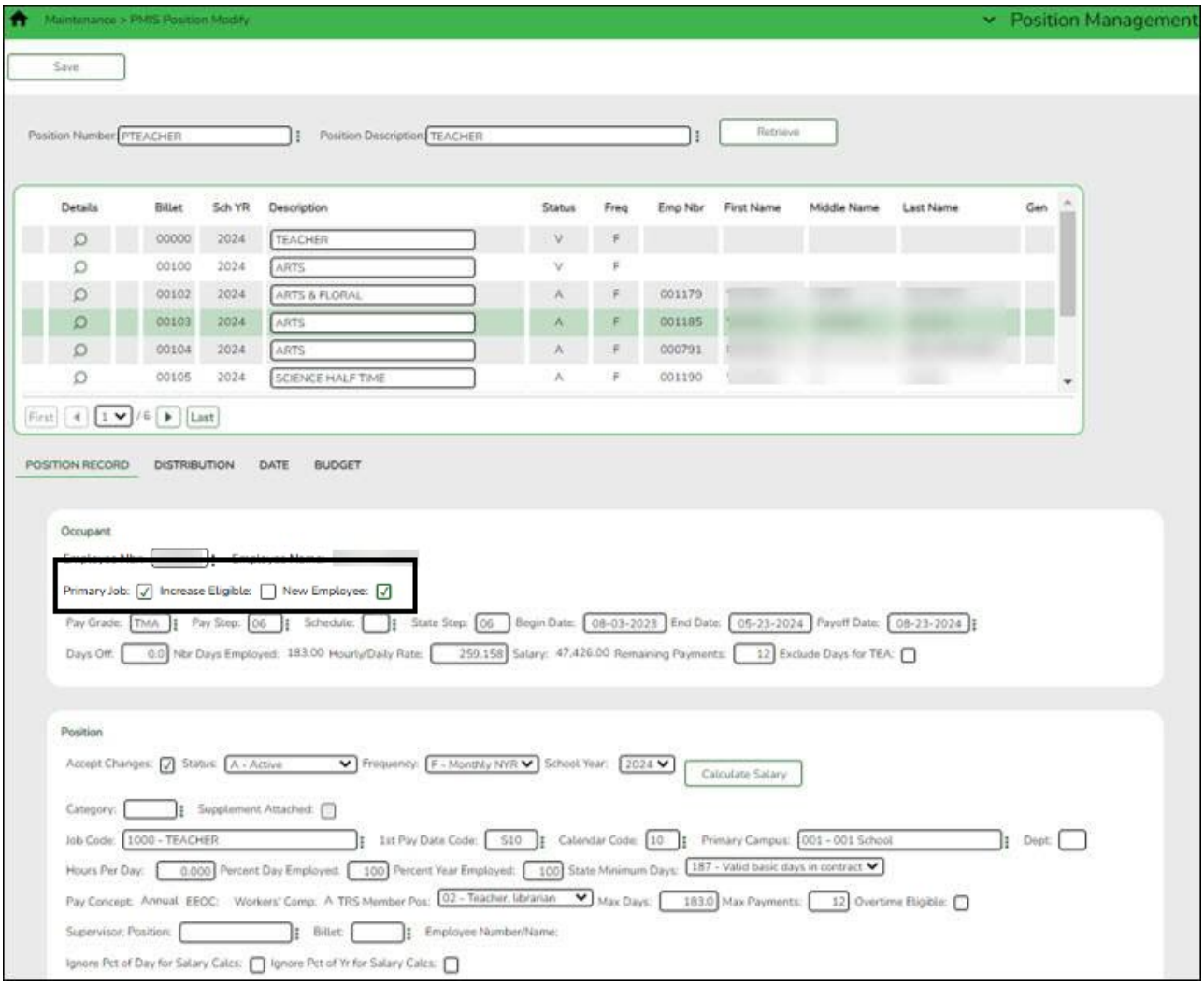
9. Update position records.

   Position Management > Maintenance > PMIS Position Modify > Position Record

   If necessary, update the **Increase Eligible** field to identify the employees who are eligible to receive a salary increase for the new school year when running simulations. Only the employees with this field selected will receive a salary increase.



❑ Clear the **Increase Eligible** field for new employees who are not entitled to a salary increase. Remember that the next year Position Management pay step reflects the same current year Position Management pay step, and the step is increased in the salary simulations if the **Increase Eligible** field is selected.



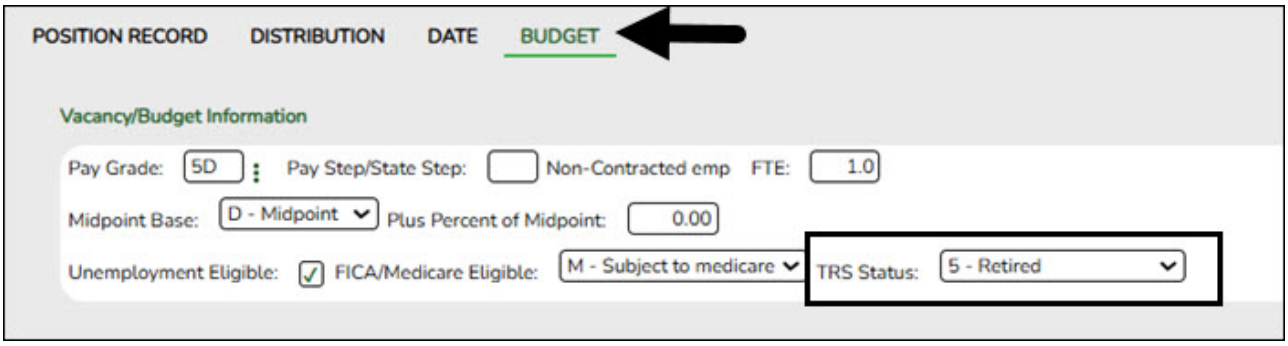
❑ If necessary, update the **New Employee** field to identify new employees on forecast position records. If selected, the salary simulations will budget the employer contribution for new employees even though they do not have current year payroll records.

> **Notes**:
>
> This field is not displayed on supplemental position records.
>
> If the position is changed to any status other than **Active**, the field is disabled.

❑ Clear this field If an employee is no longer new to the LEA.

Position Management > Maintenance > PMIS Position Modify > Budget

If there are retirees who work in the LEA, confirm that the **TRS Status** field is set to *5 - Retired*. If the TRS status is incorrect, there is a possibility that the status will be incorrect (TRS-eligible) when the employee is moved to the current year payroll.



Update NYR Positions and Move 10-, 11-, and 12-month Employees to CYR Payroll

- 10-month Employees
- 11-month Employees
- 12-month Employees

Interface to Budget Checklist

Checklist