



pmis_initial_setup_new_users

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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.

Delete	Job Code	Job Description	EEOC Code	Account Code	Salary Concept	Inc
	0000	SUBSTITUTE TEACHER		- - . - - - -	A Use annual salary table	
	0020	HOURLY HOLIDAY PAY	16 Service workers	199-51-6129.00-999-8-99-0-X	D Use hourly/daily rate table	
	0100	SUPERINTENDENT	01 Official, admin, mgr	- - . - - - -	D Use hourly/daily rate table	
	0101	INTERIM SUPERINTENDENT	01 Official, admin, mgr	XXX-XX-XXXX-XX-XXX-X-XX-X	D Use hourly/daily rate table	
	0113	ASSISTANT SUPERINTENDENT	01 Official, admin, mgr	- - . - - - -	D Use hourly/daily rate table	
	0115	BUSINESS MANAGER	01 Official, admin, mgr	- - . - - - -	D Use hourly/daily rate table	
	0116	CURRICULUM DIRECTOR	01 Official, admin, mgr	- - . - - - -	D Use hourly/daily rate table	
	0120	ADMINISTRATIVE ASST.	01 Official, admin, mgr	XXX-XX-XXXX-XX-XXX-X-XX-X	D Use hourly/daily rate table	
	0121	DIRECTOR SPECIAL PROGRAMS	01 Official, admin, mgr	XXX-XX-XXXX-XX-XXX-X-XX-X	D Use hourly/daily rate table	
	0122	DIRECTOR, FOOD SERVICES	16 Service workers	- - . - - - -	D Use hourly/daily rate table	
	0125	DIRECTOR, SPECIAL EDUCATION		- - . - - - -	A Use annual salary table	
	0128	FACILITATOR/DAEP		- - . - - - -	A Use annual salary table	
	0129	ADMIN COM ED & ATT		- - . - - - -	A Use annual salary table	
	0130	OCS/DAEP TCHR	07 Other classrm teach	XXX-XX-XXXX-XX-XXX-X-XX-X	A Use annual salary table	
	0133	SUPERVISOR, VOC EDUCATION		- - . - - - -	A Use annual salary table	

First 1 / 23 Last Add

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

Tables > Salaries

Save

LOCAL ANNUAL HOURLY/DAILY EXTRA DUTY FUND TO GRANT STATE MINIMUM SUBSTITUTE MIDPOINT

Records

Pay Grade: All

Pay Step: All

Retrieve Print

Delete	Pay Grade	Pay Step	Max Days Employed	Local Sched	Annual Amt
	ADM	29	000		73,033.02
	AGR	0	226		48,971.65
	AGR	01	226		50,495.00
	AGR	02	226		50,865.82
	AGR	09	207		48,971.65
	AGR	29	226		71,437.78
	AGR	30	226		70,762.18
	NTE	0	187		46,000.00
	NTE	1	000		46,200.00
	NTE	10	187		48,950.00
	NTE	11	187		49,250.00
	NTE	12	187		49,550.00
	NTE	13	187		49,950.00
	NTE	14	187		50,450.00
	NTE	15	187		51,250.00

First 1 / 5 Last Add

[Personnel > Tables > Salaries > Hourly/Daily](#) - Contracted and Non-contracted employees

Tables > Salaries Personnel

Save

LOCAL ANNUAL HOURLY/DAILY EXTRA DUTY FUND TO GRANT STATE MINIMUM SUBSTITUTE MIDPOINT

Records
 Pay Grade:
 Pay Step:

Retrieve Print

Delete	Pay Grade	Pay Step	Hrs Per Day	Rate Type	Local Sched	Pay Type	Est Ovtm Hrs	Amount
	1	00	8.00	Hourly		v	0.0	9.040
	11	01	0.00	Daily		v	0.0	245.427
	12	00	0.00	Daily		v	0.0	281.810
	12	01	0.00	Daily		v	0.0	299.647
	12	02	0.00	Daily		v	0.0	251.549
	12	03	0.00	Daily		v	0.0	286.956
	12	04	0.00	Daily		v	0.0	286.957
	12	05	0.00	Daily		v	0.0	236.724
	12	06	0.00	Daily		v	0.0	251.450
	13	01	0.00	Daily		v	0.0	312.376
	13	02	0.00	Daily		v	0.0	361.991
	13	03	0.00	Daily		v	0.0	305.234
	13	04	0.00	Daily		v	0.0	321.220
	13	05	0.00	Daily		v	0.0	349.341
	14	00	0.00	Daily		v	0.0	294.492

First / 10 Last Add

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.

Tables > Salaries Personnel

Save

LOCAL ANNUAL HOURLY/DAILY EXTRA DUTY FUND TO GRANT STATE MINIMUM SUBSTITUTE MIDPOINT

Records
 Pay Grade: All ▼
 Pay Type: All ▼ Retrieve Print

Delete	Pay Grade	Pay Type	Minimum	Maximum	Midpoint	Hours	Dock Rate Type
	0PG	3 Hourly employee	7.250	7.250	7.250	0.00	H - Hourly
	112	1 Contracted employee	169.490	230.000	199.745	0.00	D - Daily
	126	1 Contracted employee	169.490	230.000	199.745	0.00	D - Daily
	1PG	3 Hourly employee	9.500	14.500	12.000	8.00	H - Hourly
	210	1 Contracted employee	226.620	316.180	271.400	0.00	D - Daily
	212	1 Contracted employee	226.620	316.180	271.400	0.00	D - Daily
	2PG	3 Hourly employee	10.510	14.670	12.590	8.00	H - Hourly
	311	1 Contracted employee	247.020	344.640	295.830	0.00	D - Daily
	3PG	3 Hourly employee	11.510	16.070	13.790	8.00	H - Hourly
	412	1 Contracted employee	269.250	375.650	322.450	0.00	D - Daily
	4PG	3 Hourly employee	12.730	17.750	15.240	8.00	H - Hourly
	511	1 Contracted employee	288.090	401.950	345.020	0.00	D - Daily
	512	1 Contracted employee	288.090	401.950	345.020	0.00	D - Daily
	522	1 Contracted employee	288.090	401.950	345.020	0.00	D - Daily
	526	1 Contracted employee	288.090	401.950	345.020	0.00	D - Daily

First 1 / 2 Last Update Midpoint + Add

❑ 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.

Tables > Workday Calendars Personnel

SCHOOL CALENDAR COPY SCHOOL CALENDAR DELETE SCHOOL CALENDAR

	E	MT	200 M & O	200
	5	MT	260 M & O	261
	E	NC	197 LIBRARY AIDES	197
	5	NC	197 LIBRARY AIDES	197
	E	PC	220 Admin	
	5	PC	220 Admin	220
	E	PR	207 Staff	207
	5	PR	207 Staff	207
	E	TC	187 Staff	187
	5	TC	187 Staff	187
	E	TR	TRS WORKDAYS	187
	6	TR	TRS Cal	261
	5	TR	TRS WORKDAYS	187
	4	TR	TRS	259

[Add](#)

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.

Tables > Pay Dates

Save

Start Pay Date: 09-16-2022 Retrieve Print

Delete	Details	School Year	Pay Date	Begin Date	End Date	TRS Month	TWC Quarter	Print Alternate Address
		2024	08-23-2024	08-01-2024	08-31-2024	08	3	☐
		2024	07-25-2024	07-01-2024	07-31-2024	07	3	☐
		2024	06-24-2024	06-01-2024	06-30-2024	06	2	☐
		2024	05-24-2024	05-01-2024	05-31-2024	05	2	☐
		2024	04-25-2024	04-01-2024	04-30-2024	04	2	☐
		2024	03-25-2024	03-01-2024	03-31-2024	03	1	☐
		2024	02-23-2024	02-01-2024	02-29-2024	02	1	☐
		2024	01-25-2024	01-01-2024	01-31-2024	01	1	☐
		2023	12-20-2023	12-01-2023	12-31-2023	12	4	☐
		2023	11-24-2023	11-01-2023	11-30-2023	11	4	☐
		2023	10-25-2023	10-01-2023	10-31-2023	10	4	☐
		2023	09-25-2023	09-01-2023	09-30-2023	09	3	☐
		2023	08-25-2023	07-08-2023	08-04-2023	08	3	☐
		2023	07-25-2023	06-10-2023	07-07-2023	07	3	☐
		2023	06-23-2023	05-06-2023	06-09-2023	06	2	☐

First
1 / 2
Last
Add

Selected Pay Date:

Adjustment Nbr	Date Pay Run	Interface	User ID
No Rows			

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.

Options > Position Management District Administration

Save

Retrieve Print

District Options

Use PMIS: ☒

Unemployment Eligible: ☒

FICA / Medicare Eligible:

Use Forecast Conversion Tables: ☒

Employee Must Be Assigned a Position Prior to Creating Payroll Record: ☒

Allow CYR Position Description Changes (Admin only): ☒

Allow Forecast Position Description Changes: ☒

Display Options to Ignore Pct of Day and Pct of Year for Position Records: ☐

Current Year:

Next Year:

Minimum Foundation Year:

Default Position Record Status:

Payment Options

Round Salary to Nearest Whole Dollar: ☒

During CIC Calculation, Pay One-Time Supplement: ☒

☐ 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.

Tables > PMIS > Category District Administration

Save

CATEGORY

Starting Category Code:

Delete	Category Code	Category Description
	0001	ACCELERATED INSTRUCTION
	0002	BILINGUAL EDUCATION
	0003	STUDENT ASSESSMENT
	0004	SPECIAL ED AIDE

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.

Tables > PMIS > First Pay Date

District Administration

Save

CURRENT YEAR

NEXT YEAR

Starting Pay Date Code:

Retrieve

Print

Delete	First Pay Date Code	First Pay Date	Description
	A11	08-25-20	
	A17	08-25-20	TEACHERS AUG START
	AAP	08-25-20	207 DAYS
	AF1	08-25-20	197 DAYS CN DIRECTOR
	AFD	08-25-20	220
	AFP	08-25-20	
	AIC	08-25-20	
	ANU	08-25-20	
	AO1	08-25-20	197 DAYS
	AO2	08-25-20	203 DAYS
	AO4	08-25-20	195 DAYS
	APD	08-25-20	
	APF	08-25-20	197 DAYS
	ARG	08-25-20	210 DAYS
	J12	07-25-20	CUST/MAINT 251+ HOLIDAY
	J16	07-25-20	TEACHERS JULY START
	JAG	07-25-20	
	JCO	07-25-20	226 DAYS

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](#)

Tables > PMIS > First Pay Date District Administration

Save

CURRENT YEAR NEXT YEAR

Starting Pay Date Code: Retrieve Print

Delete	First Pay Date Code	First Pay Date	Description
	A17	08-25-20	210 DAYS 1ST OF AUG START
	AAP	08-25-20	
	AEC	08-25-20	EARLY CHECK-13
	AF1	08-25-20	197 CN DIRECTOR
	AIC	08-25-20	
	AO1	08-25-20	
	AO2	08-25-20	
	AO3	08-25-20	
	AO4	08-25-20	195 DAYS
	APF	08-25-20	
	ARG	08-25-20	
	J12	07-25-20	
	J16	07-25-20	TEACHERS JULY START
	JCO	07-25-20	
	JEP	07-25-20	
	JFD	07-25-20	220 DAYS
	JFT	07-25-20	
	JMD	07-25-20	

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.

[Tables > PMIS > Action Reason](#)
District Administration

ACTION REASON

Starting Action Reason:

Delete	Action Reason	Action Reason Description	Termination Reason	Termination Description
	01	EMPLOYEE VACATED (SYS)		
	02	CHANGE IN POSITION INFO (SYS)		
	03	EMPLOYEE MOVED INTO POS (SYS)		
	04	AS OF END-OF-YEAR (SYS)		
	05	AS OF FIRST-OF-YEAR (SYS)		
	06	Resigned		
	07	Promotion		
	08	Remove Supplement		
	09	New Hire	04	Left the employment market for personal reasons
	10	Added Supplement		
	11	Lateral		
	12	Demotion		

5. Set up inactive 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.

Tables > PMIS > Inactivate Reason District Administration

Save

INACTIVATE REASON

Starting Inactivate Reason:

Delete	Inactivate Reason	Inactivate Reason Description
	AT	Attrition
	NA	extra billet
	SN	Student Numbers

Add

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.

Tables > PMIS > First Pay Date Forecast Conversion District Administration

Save

FIRST PAY DATE FORECAST CONVERSION

Starting Pay Date Code:

Delete	From Start Code	From Start Code Description	To Start Code	To Start Code Description
	ATC	187 Days (25 pmts)	STC	187 Days (24 pmts)
	JCO	July Payroll	SNC	197 Days

Add

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.

Tables > PMIS > Forecast Conversion District Administration

Save

FORECAST CONVERSION

Retrieve Print Refresh Dates

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.

page to perform a position inquiry.

Inquiry > PMIS Position Inquiry
Position Management

Retrieve
Print

Position Description: CHILD CARE PROVIDER
Position Nbr: P5D1802

Details	Position Description	Position Number	Billet Number	Position Type	Status	Freq	Employee Nbr	Employee Name	Campus
	CHILD CARE PROVIDER	P5D1802	00003	Position	Active	E	000434		773
	CHILD CARE PROVIDER	P5D1802	00001	Position	Active	E	000719		773
	CHILD CARE PROVIDER	P5D1802	00002	Position	Active	E	000890		773

First
1 / 1
Last

Occupant

Employee Nbr: 000434 Employee Name:

Primary Job: Y Increase Eligible: N

Pay Grade: 2PG Hourly Emp State Step: Begin Date: 07-28-20 End Date: 06-28-20 Payoff Date: 07-30-20

Days Off: 0 Nbr Days Employed: 217 Hourly/Daily Rate: 10.510 Salary: 18,245.36 Remaining Payments: 24

Position

Status: A Frequency: E School Year: 20

Category: Supplement Attached: N

Job Code: 1802 1st Pay Date Code: APR Calendar Code: DC Primary Campus: 773 Dept:

Hours Per Day: 8.0 Percent Day Employed: 100 Percent Year Employed: 100 State Minimum Days: 0

Pay Concept: Midpoint EEOC: 16 Workers' Comp: B TRS Member Pos: 03 Max Days: 217 Max Payments: 24 Overtime Eligible: Y

Supervisor: Position: Billet: Employee Number/Name: not occupied

Ignore Pct Day Employed for Salary Calcs: N Ignore Pct Year Employed for Salary Calcs: N

Perform PMIS Maintenance

Log on to the next year.

1. Delete next year PMIS.

Position Management > Utilities > Mass Delete Forecast Positions

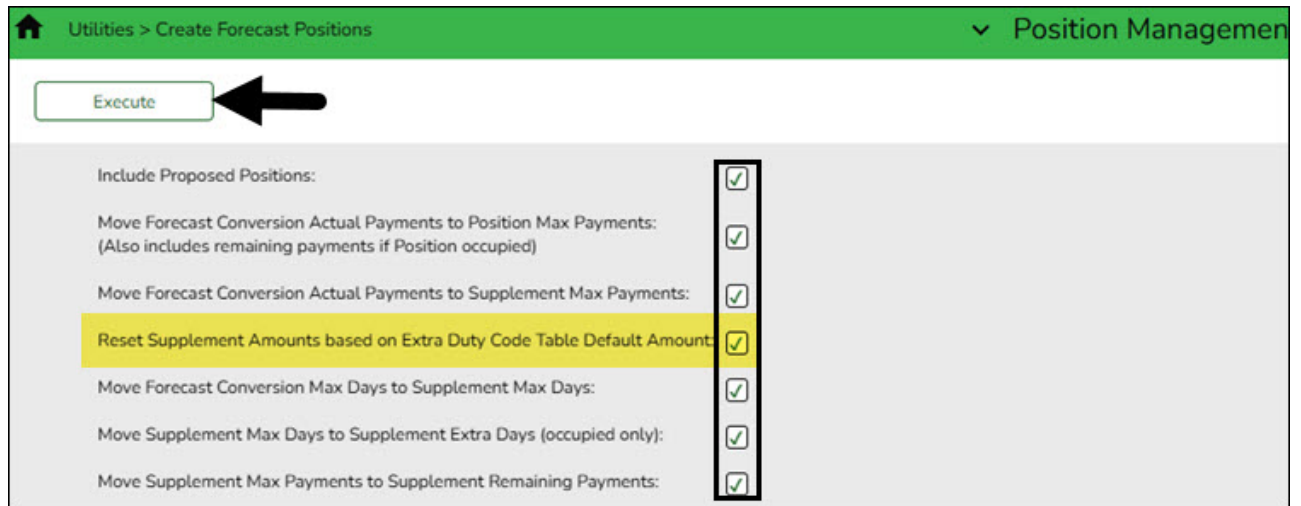
- ❑ Leave all fields blank and click **Execute**. A list of processing reports is displayed.

Select	Report Name
☒	Mass Delete Forecast Positions Process Error Listing
☒	Mass Delete Forecast Positions by Employee Name
☒	Mass Delete Forecast Positions by Campus
☒	Mass Delete Forecast Positions by Position/Billet

- ❑ 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](#)



Utilities > Create Forecast Positions Position Management

Execute ←

Include Proposed Positions:

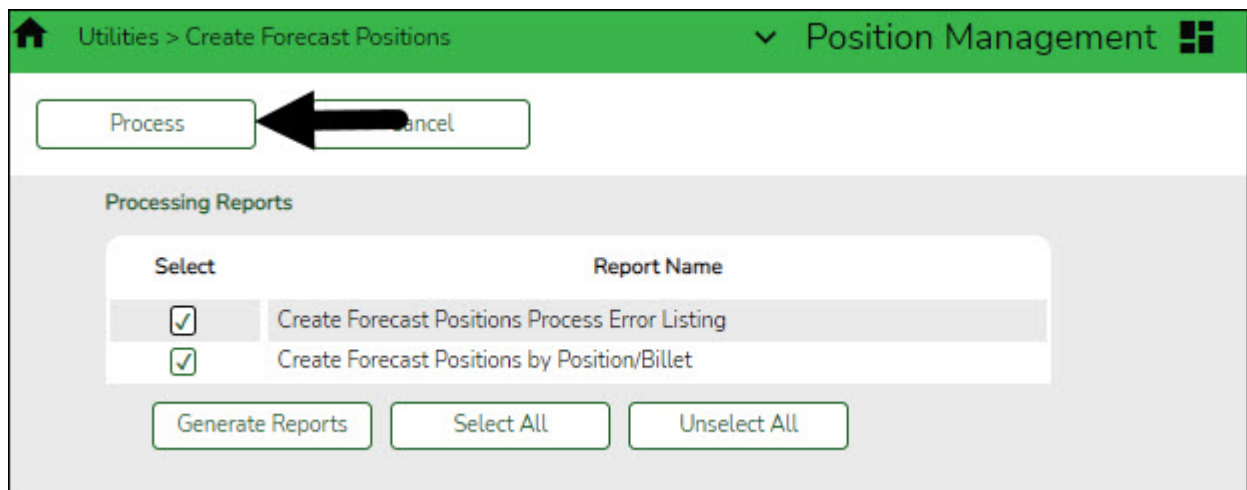
- Move Forecast Conversion Actual Payments to Position Max Payments: (Also includes remaining payments if Position occupied) ☒
- Move Forecast Conversion Actual Payments to Supplement Max Payments: ☒
- Reset Supplement Amounts based on Extra Duty Code Table Default Amount** ☒
- Move Forecast Conversion Max Days to Supplement Max Days: ☒
- Move Supplement Max Days to Supplement Extra Days (occupied only): ☒
- Move Supplement Max Payments to Supplement Remaining Payments: ☒



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.



Utilities > Create Forecast Positions Position Management

Process ← Cancel

Processing Reports

Select	Report Name
☒	Create Forecast Positions Process Error Listing
☒	Create Forecast Positions by Position/Billet

Generate Reports Select All Unselect All

- ☐ 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.

Increment	Fund/Year
☐	199/3
☒	211/3
☐	240/3
☐	255/3

☐ 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.

Position Listing by Campus ISD						
Date Run: Cnty Dist: Campus					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.

Tables > PMIS > First Pay Date Forecast Conversion
District Adm

Save

FIRST PAY DATE FORECAST CONVERSION

Starting Pay Date Code: Retrieve

Delete	From Start Code	From Start Code Description	To Start Code	To Start Code Description
	ATC	187 Days (25 pmts)	STC	187 Days (24 pmts)
	JCO	July Payroll	SNC	197 Days

Add

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

Maintenance > PMIS Position Modify Position Management

Save

Position Number: Position Description:

Details	Billet	Sch YR	Description	Status	Freq	Emp Nbr	First Name	Middle Name	Last Name	Gen
☐	00000	2024	TEACHER	V	F					
☐	00100	2024	ARTS	V	F					
☐	00102	2024	ARTS & FLORAL	A	F	001179	WANDA	MARIE	WILLIAMS	
☐	00103	2024	ARTS	A	F	001185	WENDY	CHARLES	WILSON	
☐	00104	2024	ARTS	A	F	000791	MELISSA	A	NEW EMPLOYEE	
☐	00105	2024	SCIENCE HALF TIME	A	F	001190	WHITNEY	D	WOOD	

First Last

POSITION RECORD **DISTRIBUTION** **DATE** **BUDGET**

Occupant

Employee Nbr: Employee Name: WENDY CHARLES WILSON

Primary Job: ☒ Increase Eligible ☐ New Employee: ☐

Pay Grade: Pay Step: Schedule: State Step: Begin Date: End Date: Payoff Date:

Days Off: Nbr Days Employed: 183.00 Hourly/Daily Rate: Salary: 47,426.00 Remaining Payments: Exclude Days for TEA: ☐

Position

Accept Changes: ☒ Status: Frequency: School Year:

Category: Supplement Attached: ☐

Job Code: 1st Pay Date Code: Calendar Code: Primary Campus: Dept:

Hours Per Day: Percent Day Employed: Percent Year Employed: State Minimum Days:

Pay Concept: Annual EEOC: Workers' Comp: A TRS Member Pos: Max Days: Max Payments: Overtime Eligible: ☐

Supervisor Position: Billet: Employee Number/Name:

Ignore Pct of Day for Salary Calcs: ☐ Ignore Pct of Yr for Salary Calcs: ☐



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.

Utilities > Vacate Employee from Forecast Positions Position Management

Save

VACATE EMPLOYEE FROM FORECAST POSITIONS

Employee: 000075 Retrieve

Vacate	Details	Accept Chgs	Position Type	Position Number	Position Description	Billet	Sch YR	Job Code	Status
☒		☒	P	PEB4A217	LEAD WELLNESS/PE FACILITATOR	00001	2025	A217 - LEAD WELLNESS FACILITATOR	A
☒		☒	S	S64TV	TRAVEL	00009	2025		A

Occupant Information

Job Code: A217 - LEAD WELLNESS FACILITATOR Primary Job: ☒ Percent Day Employed: 100 Percent Year Employed: 100

Pay Concept: Midpoint Pay Grade: AP3 Contracted emp: State Step: 20 Begin Date: 07-15-2024 End Date: 06-13-2025 Payoff Date: 08-15-2025

Max Days: 210.0 Days Off: 0.0 Nbr Days Employed: 210.00 Hours Per Day: 0.000 Hourly/Daily Rate: 384.688 Actual Salary: 80,784.00 Remaining Payments: 12

Primary Campus: 903 - 903 School Dept: 0 Calendar Code: 38 TRS Member Pos: 01 - Professional staff Incr Eligible: ☒

Distribution Information

Activity Code	Account Code	Grant Code	Workers' Comp	Expense 373	Employer Contribution	Percent	Amount	Dup Acct
80 - Base Salary	199-13-6119.00-903-511000		A	☒	☒	70.000	56,548.80	
80 - Base Salary	101-35-6119.00-938-599000		A	☒	☒	30.000	24,235.20	
Totals:						100.000	80,784.00	

- 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.

Maintenance > PMIS Forecast Change Position Management

FORECAST POSITION CHANGE

Employee: Retrieve

Current Forecast Positions

Details	Position Number	Position Description	Billet	Sch YR	Job Code	Status
	PTeacher	SOCIAL STUDIES	00607	2024	1000 - TEACHER	A

Occupant Information

Recalculate Position: ☐ Vacate: ☐ Ignore Pct of Day for Salary Calcs: ☐ Ignore Pct of Yr for Salary Calcs: ☐

Job Code: 1000 - TEACHER Primary Job: ☒ Percent Day Employed: 100 Percent Year Employed: 100 Calculate

Pay Concept: Annual Pay Grade: TBA Pay Step: 13 Schedule: State Step: 13 Begin Date: 08-03-2023 End Date: 05-23-2024 Payoff Date: 08-23-2024

Max Days: 183.0 Days Off: 0.0 Nbr Days Employed: 183.00 Hours Per Day: 0.000 Hourly/Daily Rate: 294.011 Actual Salary: 53,804.00 Remaining Payments: 8

Primary Campus: 001 - 001 School Dept: Calendar Code: 10 TRS Member Pos: 02 - Teacher, Librarian Incr Pay Step: ☒ Exclude Days for TEA: ☐

Distribution Information

Delete	Activity Code	Account Code	Grant Code	Workers' Comp	Expense 373	Employer Contribution	Percent	Amount	Dup Acct
	80 - Base Salary	199-11-6119.00-001-411000		A	☒	☒	100.000	53,804.00	
Totals:							100.000	53,804.00	

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:		PMIS / Payroll Discrepancy Report					Program: HRS8054
Cnty Dist:		ISD					Page: 1 of 1
Employee Level Comparison							
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:

Reports > User Created Reports > CYR/NYR Positions

Position Management

Save Create Report Delete Reset

Year: C Frequency: 6

Employee Nbr:

Position Nbr:

PMIS Position/Distribution Export File Auto Select Options

☐ PMIS Position Control ☐ PMIS Position Distribution

☐ PMIS Position Control

☐ CYR/NYR Flag	☐ Contract Beg Date	☐ Day Empld Pct	☐ Extra Duty Code	☐ Inactive Reason Code	☐ Occ Pay Type
☒ Position Nbr	☐ Contract End Date	☐ Pct of Year	☐ Supplement Type	☐ Vacate Reason	☐ Suppl Recalculate
☒ Billet Nbr	☐ Payoff Date	☐ Pay Concept	☐ Supplement Max Amt	☐ Pay Grade	☐ Ign Pct Day For Sal Calcs
☒ Position Type	☐ Nbr Days Off	☐ EEOC Code	☐ Base Suppl On Dly Rate	☐ Pay Step	☐ Ign Pct Yr For Sal Calcs
☐ Position Description	☐ Act Hrlly Dly Rate	☐ Workers' Comp	☐ Supplement Pay 1 Time	☐ Pay Schedule	☐ New Employee
☒ Position Status	☐ Salary Amount	☐ TRS Position Code	☐ Date Supplement 1 Time	☐ FTE - Equiv Units	
☐ Position School Year	☒ Nbr Remain Payments	☐ Max Days	☐ Accept Change	☐ Midpoint Base	
☐ Frequency	☐ Job Category	☐ Max Payments	☐ Date Create/Update	☐ Percent of Midpoint	
☐ Occ Employee Nbr	☐ Supplement Attached	☐ Ovtm Elig Flg	☐ Date Fill	☐ Unemployment Elig Flag	
☐ Primary Job	☐ Job Code	☐ State Minimum Days	☐ Fill Position Reason	☐ FICA Elig	
☒ Increase Elig	☐ 1st Pay Date Code	☐ Spvsr Position Nbr	☐ Date Criteria	☐ TRS Status Code	
☐ Occ Pay Grade	☐ Calendar Code	☐ Spvsr Billet Nbr	☐ Date Authorization	☐ Budget Amount	
☐ Occ Pay Step	☐ Campus ID	☐ Supplement Extra Days	☐ Date Authorization End	☐ Budget Salary Override	
☐ Occ Pay Schedule	☐ Dept	☐ Suppl to Pos Nbr	☐ Date Entry	☐ Actual/Budget Ind	
☐ State Step	☐ Hrs Per Day	☐ Suppl to Pos Billet	☐ Date Inactive	☐ Pay Type	

☐ PMIS Position Distribution

☐ CYR/NYR Flag	☐ Job Code	☐ Function	☐ Ed Span	☐ Expense 373
☐ Position Nbr	☐ Account Type	☐ Object	☐ Project Detail	☐ Contrib Acct Flag
☐ Billet Nbr	☐ Pay Activity	☐ Sub Object	☐ Account Amount	
☐ Position Type	☐ Workers' Comp	☐ Organization	☐ Account Percent	
☐ Distribution Sequence	☐ File ID	☐ Fiscal Year	☐ TRS Grant Code	
☐ Frequency	☐ Fund	☐ Program Intent	☐ Extra Duty Code	

☐ Employee Demo

☒ First Name ☐ Middle Name ☒ Last Name ☐ Generation

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.

Maintenance > PMS Position Modify Position Management

Save

Position Number: PTEACHER : Position Description: TEACHER : Retrieve

Details	Billet	Sch YR	Description	Status	Freq	Emp Nbr	First Name	Middle Name	Last Name	Gen
☐	00000	2024	TEACHER	V	F					
☐	00100	2024	ARTS	V	F					
☐	00102	2024	ARTS & FLORAL	A	F	001179				
☒	00103	2024	ARTS	A	F	001185				
☐	00104	2024	ARTS	A	F	000791				
☐	00105	2024	SCIENCE HALF TIME	A	F	001190				

First 1 / 6 Last

POSITION RECORD DISTRIBUTION DATE BUDGET

Occupant

Employee Nbr: 001185 : Employee Name: :

Primary Job: ☒ Increase Eligible: ☒ Employee: ☐

Pay Grade: TMA : Pay Step: 06 : Schedule: : State Step: 06 : Begin Date: 08-03-2023 : End Date: 05-23-2024 : Payoff Date: 08-23-2024 :

Days Off: 0.0 : Nbr Days Employed: 183.00 : Hourly/Daily Rate: 259.158 : Salary: 47,426.00 : Remaining Payments: 12 : Exclude Days for TEA: ☐

Position

Accept Changes: ☒ Status: A - Active : Frequency: F - Monthly NYR : School Year: 2024 : Calculate Salary

Category: : Supplement Attached: ☐

Job Code: 1000 - TEACHER : 1st Pay Date Code: S10 : Calendar Code: 10 : Primary Campus: 001 - 001 School : Dept: :

Hours Per Day: 0.000 : Percent Day Employed: 100 : Percent Year Employed: 100 : State Minimum Days: 187 - Valid basic days in contract :

Pay Concept: Annual EEOC : Workers' Comp: A TRS Member Pos: 02 - Teacher, Librarian : Max Days: 183.0 : Max Payments: 12 : Overtime Eligible: ☐

Supervisor Position: : Billet: : Employee Number/Name: :

Ignore Pct of Day for Salary Calcs: ☐ Ignore Pct of Yr for Salary Calcs: ☐

☐ 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.

Maintenance > PMIS Position Modify Position Management

Save

Position Number: PTEACHER Position Description: TEACHER Retrieve

Details	Billet	Sch YR	Description	Status	Freq	Emp Nbr	First Name	Middle Name	Last Name	Gen
	00000	2024	TEACHER	V	F					
	00100	2024	ARTS	V	F					
	00102	2024	ARTS & FLORAL	A	F	001179				
	00103	2024	ARTS	A	F	001185				
	00104	2024	ARTS	A	F	000791				
	00105	2024	SCIENCE HALF TIME	A	F	001190				

First 1 / 6 Last

POSITION RECORD DISTRIBUTION DATE BUDGET

Occupant

Employee Mbr: Employee Name:

Primary Job: ☒ Increase Eligible: ☐ New Employee: ☒

Pay Grade: TMA Pay Step: 06 Schedule: State Step: 06 Begin Date: 08-03-2023 End Date: 05-23-2024 Payoff Date: 08-23-2024

Days Off: 0.0 Nbr Days Employed: 183.00 Hourly/Daily Rate: 259.158 Salary: 47,426.00 Remaining Payments: 12 Exclude Days for TEA: ☐

Position

Accept Changes: ☒ Status: A - Active Frequency: F - Monthly NYR School Year: 2024 Calculate Salary

Category: Supplement Attached: ☐

Job Code: 1000 - TEACHER 1st Pay Date Code: 510 Calendar Code: 10 Primary Campus: 005 - 001 School Dept:

Hours Per Day: 0.000 Percent Day Employed: 100 Percent Year Employed: 100 State Minimum Days: 187 - Valid basic days in contract

Pay Concept: Annual EEOC: Workers' Comp: A TRS Member Pos: 02 - Teacher, Librarian Max Days: 183.0 Max Payments: 12 Overtime Eligible: ☐

Supervisor Position: Billet: Employee Number/Name:

Ignore Pct of Day for Salary Calcs: ☐ Ignore Pct of Yr for Salary Calcs: ☐

☐ 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.

POSITION RECORD

DISTRIBUTION

DATE

BUDGET ←

Vacancy/Budget Information

Pay Grade: 5D

Pay Step/State Step:

Non-Contracted emp

FTE: 1.0

Midpoint Base: D - Midpoint

Plus Percent of Midpoint: 0.00

Unemployment Eligible: ☒

FICA/Medicare Eligible: M - Subject to medicare

TRS Status: 5 - Retired

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](#)