



moving_10month_employees_cyr_payroll_ste p15

Table of Contents

moving_10month_employees_cyr_payroll_step15 i

Log on to the next year.

Position Management > Utilities > Move Forecast to CYR Position and Payroll

This process is used to move payroll and position forecast records to the current year PMIS with the same information that is set up in the next year PMIS records.

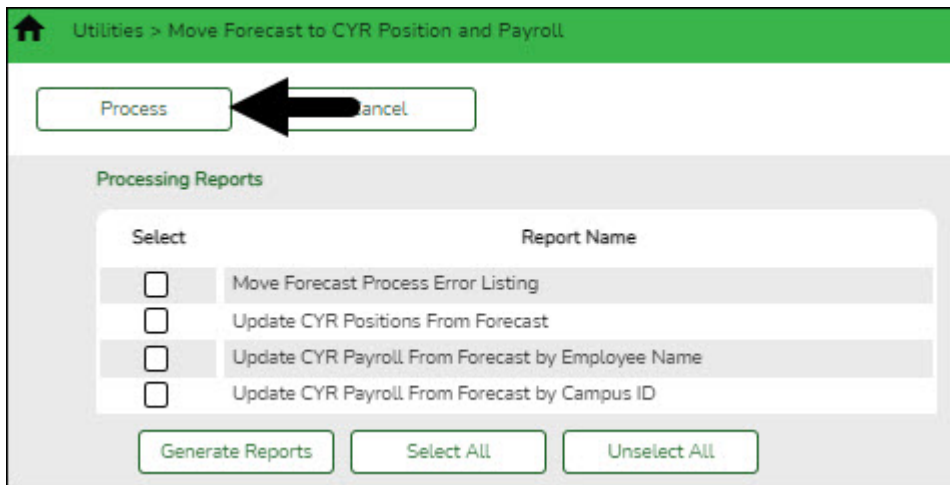
It also updates fields on the following Maintenance tabs: Employment Info, Pay Info, Job Info, Distribution

The **Accept Changes** field must be cleared when moving position records from forecast to current; otherwise, position records cannot be moved. The **Accept Changes** field is cleared after running a simulation with the **Update Forecast** field set to Yes. Similarly, you cannot run a simulation for positions without the **Accept Changes** field selected.

- In the **Select Pay Frequency** field, select the payroll frequency to be updated. LEAs with multiple frequencies must individually process each frequency.
- Do not select **Include Vacant Supplements**.
- Do not select **Validate Accounts against General Ledger** at this time. Distribution accounts in next year PMIS reflect the fiscal year for the upcoming school year. Finance still reflects the current year for the fiscal year in the general ledger. When running this process, the error report reflects funds for employees who are included in the process. It is necessary to create the funds with the new fiscal year on the Finance > Tables > Account Codes > Fund tab. It is NOT necessary to set up codes in the Chart of Accounts.
- Do not select **Update TRS Year**. If an employee has this field selected but they are now a 10-month employee, the **TRS Year** field is cleared when the 10-month move is processed.

- Select **Update Workers' Comp Annual and Remaining Payments** if the LEA expenses worker's compensation in ASCENDER. The system references the **# of months in Contract** and makes the **WC Ann Pymts** and **WC Remaining Pymts** match this field.
- Leave the **Additional Workers' Comp Payments** field blank. It is not necessary to populate this field even if the LEA expenses workers' compensation in ASCENDER.
- In the **Select a Stat Minimum Salary Table (CYR/NYR)** field, select the year (current or next) that contains the tables with the updated amounts. If it is a legislative year and the state minimum amounts are updated.
- In the **First Pay Date Codes or blank for ALL** field, select only the first pay date codes for employees who receive their first paycheck in July.
- Select **Include Extra Duty** to include the supplement pay with the regular pay.

Click **Execute** to execute the process. The following reports are available:



- Move Forecast Process Error Listing [Important errors](#)

Error Message	Description
Warning: The employee has Contract Balance amounts not equal to zero for current jobs.	The employee has not been paid off by payroll.
Failure: Position Accept Changes Flag set to Y	The position will not be moved to the current/payroll.
Failure: Emp Nbr must have one position declared as primary.	The error does not necessarily reference the Primary Job field on the position. If an employee has a regular position and a supplement position, but there is an error that causes the primary position to fail, this message often indicates that there is only a supplement position to be moved. It is recommended to review and correct any errors that begin below this message about primary positions. After making those corrections, run the process again. This may resolve the primary job errors. This error also occurs when calendars have not been copied to the current year.

Error Message	Description
<p>Warning: Emp Nbr has multiple supplement positions for the same job; however, one or more of the following do not match: Campus ID, Dept, TRS Status Code, FTE Units, Incr Elig, Max Paymts, FICA Elig, Unemp Elig, EEOC, Workers Comp, Supplement Extra Days or Category Cd. The values from lowest Supplement Position Number/Billet may be used if new rows are inserted for the Pay Info and Job Info tabs.</p>	<p>This error indicates that the fields on the Payroll > Tables > Salaries > Extra Duty tab do not match those selected on a supplemental position.</p> <p>Use the Position Management > Inquiry > PMIS Staff Inquiry to determine the Position Number and Billet for any supplemental positions for the employee. Then, use the Position Management > Maintenance > PMIS Supplement Modify page to retrieve the position and billet and compare the fields on the position to the Payroll > Tables > Salary > Extra Duty tab for the extra duty number on the supplement. For example, in some cases the W/C code on the position may not match the W/C code on the table. Or, the Exp 373 field on the position may be selected, but the Exp 373 on the table for that extra duty code may not be selected. Either the table or the position needs to be updated so that they both match. If changes are made to the Extra Duty table, it is necessary to move the table to the current year payroll before proceeding.</p>

Date Run: Move Forecast to CYR Position and Payroll Errors			
Cnty Dist:		ISD	
			Page: 1 of 4
Position Nbr	Billet Nbr	Pos Typ	Error Message
			Failure: Emp Nbr 000007 must have one position declared as primary.
			Failure: Emp Nbr 000128 must have one position declared as primary.
			Failure: Emp Nbr 000148 must have one position declared as primary.
			Failure: Emp Nbr 000200 has unprocessed Reg Hours, Ovtm Hours, or Abs Ded transmittals.
			Failure: Emp Nbr 000200 must have one position declared as primary.
			Failure: Emp Nbr 000498 must have one position declared as primary.

- Update CYR Positions From Forecast - The error report lists any funds that need to be set up in the Finance tables.

Date Run: Update CYR Positions From Forecast						
Cnty Dist:			ISD			Page: 1 of 1
Position Nbr	Billet Nbr	Pos Typ	Description	Employee Number	Employee Name	
			No Rows	No Rows	Vacant	
End of Report						

- Update CYR Payroll From Forecast by Employee Name

Date Run:		Update NYR Payroll From Forecast by Employee Name						Page: 1 of 1	
Cnty Dist:		ISD							
School Year:									
Emp Nbr	Employee Name		Field			Field			
Field	Old	New	Field	Old	New	Field	Old	New	
No Rows	Vacant		Freq:						
Employment Date	Campus		Contract Amount			Contract Remain Amt			
Pay Status	Primary Job		Pay Rate			Hrly/Dly Rate			
FICA Eligible	Overtime Eligible		Overtime Rate			Dock Rate			
Unemp Eligible	Increase Eligible		State Min Salary			Nbr Mon Contr			
TRS Status	Calendar Code		Nbr Annl Pymts			Nbr Rem Pymts			
Job Code	State Step		Job Pot Assgnd			Pot Day Empld			
Pay Concept	TRS Year		Hrs Per Day			Nbr Days Off			
Pay Type	TRS Position Code		Wrk's Comp Annl			Wrk's Comp Remain			
Contract Begin Date	Accrual Code								
Contract End Date	Exempt Status								
Payoff Date	Nbr Days Contract								
Pay Grade	Nbr Days Empld								
Pay Step	Max Days								
Sched	Wrk's Comp Annl								
EEOC Code	Wrk's Comp Remain								

- Update CYR Payroll From Forecast by Campus ID

Date Run:		Update NYR Payroll From Forecast by Campus ID						Page: 1 of 1	
Cnty Dist:		ISD							
School Year:									
Emp Nbr	Employee Name		Field			Field			
Field	Old	New	Field	Old	New	Field	Old	New	
No Rows	Vacant		Freq:						
Employment Date	Campus		Contract Amount			Contract Remain Amt			
Pay Status	Primary Job		Pay Rate			Hrly/Dly Rate			
FICA Eligible	Overtime Eligible		Overtime Rate			Dock Rate			
Unemp Eligible	Increase Eligible		State Min Salary			Nbr Mon Contr			
TRS Status	Calendar Code		Nbr Annl Pymts			Nbr Rem Pymts			
Job Code	State Step		Job Pot Assgnd			Pot Day Empld			
Pay Concept	TRS Year		Hrs Per Day			Nbr Days Off			
Pay Type	TRS Position Code		Wrk's Comp Annl			Wrk's Comp Remain			
Contract Begin Date	Accrual Code								
Contract End Date	Exempt Status								
Payoff Date	Nbr Days Contract								
Pay Grade	Nbr Days Empld								
Pay Step	Max Days								
Sched	Wrk's Comp Annl								
EEOC Code	Wrk's Comp Remain								

- Click **Generate Reports**. The selected reports are displayed. [Review the report](#).
- Click **Continue** to view the next report. Or, click **Return** to return to the report selection page.
- After reviewing all of the reports and correcting all errors, return to the report selection page and click **Process** to move the forecast records to the current year. You are prompted to create a [backup](#).

After the process is completed, the actual update is performed. If the update is successful, a message is displayed indicating that the move forecast updates were successfully processed.

- Click **Cancel** to return to the Move Forecast to CYR Position and Payroll page without moving the forecast records to the current year.

If corrections are processed, repeat this step.

Generate and save each report. Compare the Update CYR Positions From Forecast report to the user-created report that was previously generated to confirm that all 10-month employees are included. The last two reports contain the same information; one is sorted by employee name and the other by campus ID. These reports reflect the existing salary in the current year payroll and the new salary, which overwrites the current year payroll amounts. Review the reports for accuracy.