



moving_10month_employees_cyr_payroll_ste p15

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Log on to the next year payroll.

Human Resources > Utilities > PMIS > 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 Human Resources > Maintenance > Staff Job/Pay Data > Employment Info, Pay Info, Job Info, and Distribution tabs.

In order to move position records from forecast to current, the **Accept Changes** field must be selected; 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.
- 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. Note - when you run this process, the error listing will reflect funds for employees that are included in this process. It will be necessary to go to Finance > Tables > Account Codes on the fund tab and create that fund with the new fiscal year in the table. It is NOT necessary to set up codes in the Chart of Accounts.
- Do not select Update TRS Year.
- Select Update Workers' Comp Annual and Remaining Payments if your LEA expenses W/C through the system, select this field. The system will look at the # of months in Contract and make the WC Ann Pymts and WC Remaining Pymts match this field.
- Add Additional Workers' Comp Payments - It is not necessary to enter anything in this field, even if you expense W/C through the system.
- Select Stat Minimum Salary Table (CYR/NYR) - If it is a legislative year and the state minimum amounts have changed, select the year (current year or next year) that contains the tables with the updated amounts. One of these must be selected at this time, even if they both currently match.
- Select First Pay Date Codes or blank for ALL - select only first pay date codes that pertain to employees that receive their first check in September.
- Include Extra Duty - select this box to include the supplement pay with the regular pay for employees.

Four report options will display after Execute is selected. Generate the Move Forecast Process Error Listing. If errors exist, Cancel and make corrections at this time. Do not select Process until all errors are resolved. The error report will provide a listing of any funds that need to be set up in the Finance tables.

When reviewing the errors, it is possible the following error will display:

The message that states that the employee must have one position declared as primary 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 move across. The recommendation is to review and correct any errors that begin below this message about primary positions. Once those corrections are made, return to step 14 and execute again. This may resolve the primary job errors.

Another error that may be generated is as follows:

This message indicates that the fields in the Tables > Salaries - Extra Duty tab do not match the selections made on a Supplemental position. The employee number is reflected in the message. Using Inquiry > PMIS Staff Inquiry determine the Position Number and Billet for any supplemental positions for this employee. Navigate to Maintenance > PMIS Supplement Modify and pull in that position and billet. Compare the fields on this position to the Tables > Salary - Extra Duty tab for the extra duty number reflected on the supplement. As an example, many times the W/C code on the position may not match the W/C code in 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 the table and the position will match. If changes are made to the Extra Duty Table, it will be necessary to move this table across to CY Payroll before proceeding.

If corrections were made, repeat step 14. Generate each report and either save or print. Compare the 'Update CYR Positions From Forecast' report to the User Created report that was generated in step 4 to confirm that all 10-month employees will be included. The last two reports contain the same information, but one is sorted by employee name and the other by campus ID. These reports will reflect the existing salary in current year payroll, and the new salary that will overlay these amounts. Both of these reports should be carefully reviewed for accuracy.

If no errors exist, select Process.