



# **pmis\_district\_admin**



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## 1. Update Position Management 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.

The screenshot shows the 'Options > Position Management' page in District Administration. The page has a green header with a home icon, the breadcrumb 'Options > Position Management', and the text 'District Administration' with a menu icon. Below the header are three buttons: 'Save', 'Retrieve', and 'Print'. The main content area is divided into two sections: 'District Options' and 'Payment Options'. In the 'District Options' section, there are several rows of options, each with a label, a checkbox, and a dropdown menu. A red box highlights the 'Current Year', 'Next Year', and 'Minimum Foundation Year' fields, which are all set to '20'. The 'Default Position Record Status' dropdown is set to 'V - Vacant(just position info, ready to fill emp)'. In the 'Payment Options' section, there are two rows of options, each with a label and a checked checkbox.

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. Update the current and next year 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.

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	

3. 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**.

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
	F2	F2			08-03-2023	05-23-2024	08-23-2024	183	0.0	183	12
	SBD	BD			08-03-2023	05-23-2024	08-23-2024	177	0.0	177	12
	S11	11		TEACHER + 10 DAYS	07-26-2023	05-31-2024	08-23-2024	193	0.0	193	12
	S10	10			08-03-2023	05-23-2024	08-23-2024	183	0.0	183	12
	JFD	FD		220 DAYS	07-17-2023	06-28-2024	06-24-2024	220	0.0	220	12
	JEP	EP			07-24-2023	06-28-2024	06-24-2024	215	0.0	215	12
	JCO	CO			07-03-2023	06-28-2024	06-24-2024	226	0.0	226	12
	J16	16		TEACHERS JULY START	07-03-2023	06-28-2024	06-24-2024	226	0.0	226	12
	J12	12			07-03-2023	06-28-2024	06-24-2024	256	0.0	256	12
	ARG	RG			07-10-2023	06-13-2024	07-25-2024	210	0.0	210	12
	AO4	O4		195 DAYS	07-25-2023	06-04-2024	07-25-2024	195	0.0	195	12
	AO2	O2			07-17-2023	06-04-2024	07-25-2024	203	0.0	203	12
	AO1	O1			07-24-2023	06-04-2024	07-25-2024	197	0.0	197	12
	AAP	AP			07-17-2023	06-14-2024	07-25-2024	207	0.0	207	12
			01		--	--	--	0	0.0	0	12
			02		--	--	--	0	0.0	0	12
			04		--	--	--	0	0.0	0	12
			05		--	--	--	0	0.0	0	12
			06		--	--	--	0	0.0	0	12
			07		--	--	--	0	0.0	0	12
			08		--	--	--	0	0.0	0	12
			20		--	--	--	0	0.0	0	12
			25		--	--	--	0	0.0	0	12
			26		--	--	--	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.



**Reminder:** If you set up a new calendar code in Position Management at any point during the year, be sure to set up a new first pay date code using that calendar code and add that information to this table.