



# **pmis\_district\_admin**



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## Options > PMIS

Update the following fields:

- Current Year – enter the fiscal year for the current school year. When the school year on the position matches this current year, the position will be validated using current year HR tables.
- Next Year – enter the fiscal year for the next school year. When the school year on the position matches this next year, the position will be validated using next year HR tables.
- Minimum Foundation Year – determines which state minimum table to use: current year or next year.

Tables>PMIS>First Pay Date Complete the Current Year tab with the First Pay Dates of the current year, and the Next Year tab with the First Pay Dates that will be used for next year.

Tables>PMIS>Forecast Conversion NOTE: Calendars must be set up in Next Year Payroll files and Pay Dates for the new year must be entered before completing this step.

Enter the next year begin and end date dates (must match new calendars in NYR PR) and the payoff dates (must exist in Pay Dates table) for each First Pay Date Code. This process updates the table, and replaces the mass updating process we would normally do in NYR PR. The following steps will need to be completed to make this change to each position.

Delete NYR PMIS Human Resources>NY Frequency>Utilities>PMIS>Mass Delete Forecast Positions Leave all fields blank and Execute Print or save reports and Process. Create the export when prompted.

Copy current year positions to next year Human Resources>NY Frequency>Utilities>PMIS>Create Forecast Positions Execute with all fields selected Generate reports. Verify errors and make corrections, if necessary. Click Process. Create the export when prompted

Update the fiscal year for distributions Human Resources>NY Frequency>Utilities>PMIS>Update Fiscal Year by Fund

This process will increment the fiscal year reflected on the Position Distribution by 1.

Generate the Position Listing by Campus Report from NYR PMIS. Reports>PMIS Reports>Position Listing by Campus HRS8050

Use this report to determine if any employees need to be moved to a different position, if you have vacant positions you need to update with employee information, or if you have any supplemental positions that need to be updated for stipends.

Update Positions and Supplement Positions as needed Human Resources>NY Frequency>Maintenance>PMIS Position Modify or PMIS Supplement Modify

Generate the PMIS/Payroll Discrepancy report to determine if you have active employees that have not been assigned to a forecast position.

Verify the “Increase Eligible” field for positions with a PMIS User Created Report. Employees that were new to the district last year may not have it selected. You will need to select this field for them if they will be eligible for an increase when running simulations for the new school year. As new employees are placed in positions, deselect this field on their position. Remember that the step in NYR PMIS reflects the same pay step that is reflected in CYR. HR>Maintenance>PMIS Position Modify – Position Record and Increase Eligible