



pmis_district_admin

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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.

The screenshot shows the 'District Administration' interface for 'Options > Position Management'. It includes a 'Save' button and 'Retrieve'/'Print' buttons. The 'District Options' section contains several checkboxes and a dropdown menu, with a red box highlighting the 'Current Year', 'Next Year', and 'Minimum Foundation Year' input fields. The 'Payment Options' section is also visible at the bottom.

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
<input type="button" value="Delete"/>	<input type="text" value="0001"/>	<input type="text" value="ACCELERATED INSTRUCTION"/>
<input type="button" value="Delete"/>	<input type="text" value="0002"/>	<input type="text" value="BILINGUAL EDUCATION"/>
<input type="button" value="Delete"/>	<input type="text" value="0003"/>	<input type="text" value="STUDENT ASSESSMENT"/>
<input type="button" value="Delete"/>	<input type="text" value="0004"/>	<input type="text" value="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.

The screenshot shows the 'District Administration' interface for 'Tables > PMIS > First Pay Date'. It features a 'Save' button at the top left. Below it are two tabs: 'CURRENT YEAR' (selected) and 'NEXT YEAR'. A 'Starting Pay Date Code' input field is followed by 'Retrieve' and 'Print' buttons. The main area contains a table with the following data:

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

Save

ACTION REASON

Starting Action Reason:

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

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: Retrieve Print

Delete	Inactivate Reason	Inactivate Reason Description
	<input type="text" value="AT"/>	<input type="text" value="Attrition"/>
	<input type="text" value="NA"/>	<input type="text" value="extra billet"/>
	<input type="text" value="SN"/>	<input type="text" value="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 Adm

Save

FIRST PAY DATE FORECAST CONVERSION

Starting Pay Date Code: Retrieve Print

Delete	From Start Code	From Start Code Description	To Start Code	To Start Code Description
	<input type="text" value="ATC"/>	187 Days (25 pmts)	<input type="text" value="STC"/>	187 Days (24 pmts)
	<input type="text" value="JCO"/>	July Payroll	<input type="text" value="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
<input type="checkbox"/>	SF2	F2			08-11-2022	05-19-2023	08-25-2023	180	0.0	180	12
<input type="checkbox"/>	SBD	BD			08-15-2022	05-19-2023	08-25-2023	173	0.0	173	12
<input type="checkbox"/>	S11	11		TEACHER + 10 DAYS	08-01-2022	05-25-2023	08-25-2023	190	0.0	190	12
<input type="checkbox"/>	S10	10			08-10-2022	05-19-2023	08-25-2023	180	0.0	180	12
<input type="checkbox"/>	JFD	FD		220 DAYS	07-18-2022	06-30-2023	06-23-2023	220	0.0	220	12
<input type="checkbox"/>	JEP	EP			07-25-2022	06-30-2023	06-23-2023	215	0.0	215	12
<input type="checkbox"/>	JCO	CO			07-01-2022	06-30-2023	06-23-2023	226	0.0	226	12
<input type="checkbox"/>	J16	16		TEACHERS JULY START	07-01-2022	06-30-2023	06-23-2023	226	0.0	226	12
<input type="checkbox"/>	J12	12			07-01-2022	06-30-2023	06-23-2023	251	0.0	251	12
<input type="checkbox"/>	ARG	RG			07-20-2022	06-13-2023	07-25-2023	210	0.0	210	12
<input type="checkbox"/>	AO4	O4		195 DAYS	08-01-2022	06-02-2023	07-25-2023	195	0.0	195	12
<input type="checkbox"/>	AO3	O3			07-25-2022	06-07-2023	07-25-2023	203	0.0	203	12
<input type="checkbox"/>	AO2	O2			07-25-2022	06-07-2023	07-25-2023	203	0.0	203	12
<input type="checkbox"/>	AO1	O1			08-01-2022	06-06-2023	07-25-2023	197	0.0	197	12
<input type="checkbox"/>	AF1	F1		197 CN DIRECTOR	08-01-2022	06-06-2023	07-25-2023	197	0.0	197	12
<input type="checkbox"/>	AAP	AP			07-25-2022	06-13-2023	07-25-2023	207	0.0	207	12
<input type="checkbox"/>			T2		--	--	--	0	0.0	0	12
<input type="checkbox"/>			T1		--	--	--	0	0.0	0	12
<input type="checkbox"/>			S6		--	--	--	0	0.0	0	12
<input type="checkbox"/>			S4		--	--	--	0	0.0	0	12
<input type="checkbox"/>			MA		--	--	--	0	0.0	0	12
<input type="checkbox"/>			M9		--	--	--	0	0.0	0	12
<input type="checkbox"/>			M8		--	--	--	0	0.0	0	12
<input type="checkbox"/>			M7		--	--	--	0	0.0	0	12
<input type="checkbox"/>			M6		--	--	--	0	0.0	0	12
<input type="checkbox"/>			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.

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