



Position Management Process - Sample Timeline (February/March)

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Planning Meeting

Conduct a planning meeting and include all of the necessary departments (Finance/Budget and HR/Payroll) to discuss the following:

- **Timelines** | Set the calendars for cutoff dates and anticipated processing dates.
- **Payroll** | Prepare for special circumstances such as pay scale changes based on TASBO studies, new pay structures, new job codes, employer contribution rate changes, etc.
- **Budgetary expectations** | New schools, school closings, position consolidations, fund source changes, new supplements (extra duties) or supplement consolidations or eradication.
- **Retroactive pay planning** | Approved salaries before moves from forecast to current.
- **Proposed positions** | New positions or inactivations.

Gather Data

Identify groups and determine the following:

- The first pay date codes to be moved into each group.
- The pay scales to be used for each move.
- Design simulations in advance for quicker processing.
- Identify stipends/supplements by each group.

Update District Administration Options and Tables

Use the District Administration > Tables > PMIS pages to update the following if necessary:

- Update the new school year.
- Update the pay date tables with the new year pay dates.
- Update the school calendar table with the new school year calendars.
- Update first pay dates for the new school year.
- Update the forecast conversion table with new pay dates, calendars, and first pay dates for all groups including xtra duty.
- Copy tables from the current to the next year (only job codes and salary tables need to be copied).
- Update the forecast conversion first pay date table when moving employees from 13/27 to 12/26 payments.
- Delete old forecast records.
- Create forecast from the current year.
- Run the first snapshot of all of the forecast positions through the simulation process on all salaries and groups.
- Continue to use the simulation process for each group. Any modifications to the forecast records can be made to modify each simulation until you have the one you want to update the forecast records and update budget.