Position Management Process - Sample Timeline (February/March)

Table of Contents

In the February/March timeframe, prior to using the Position Management Information System (PMIS), assemble a planning team comprised of representatives from the necessary departments (Finance/Budget and Human Resources/Payroll) to discuss and make informed decisions about the following items.

For complete information, review the Position Management Information System (PMIS) Process guide.

❑ **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, and employer contribution rate changes, etc.

❑ **Budgetary expectations** | Discuss new schools, school closings, position consolidations, fund source changes, new supplements (extra duties) or supplement consolidations or eradication.

❑ **Retroactive pay planning** | Discuss approved salaries before moving from forecast to current.

❑ **Proposed positions** | Discuss new positions or inactivations.

❑ **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 easy processing.
- Identify stipends/supplements by each group.

❑ **Use the District Administration > Tables > PMIS pages to perform the following tasks**:

- 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 extra 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.