

Move Forecast to NYR Payroll - HRS6270

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This utility is used to move select groups of payroll forecast records to the next year based on the selection criteria entered. Once payroll forecast records are moved to next year, end-of-year accruals can be processed.

You must be logged on to a next year pay frequency to access this utility.

Only occupied positions within forecast can be moved to next year payroll.

Employees with end-of-year accruals that have been calculated to determine if the create General Journal step has been performed will not be moved.

Please create an export using Export Pay Tables and Export Human Resources by Payroll prior to using this utility.

This utility does not update the **Percent Day Employed** field on the Human Resources > Maintenance > Staff Job/Pay Data > Employment Info tab.

PMIS Overtime Notes

- If the employee's position record has hours per day, the following overtime calculation is used: overtime rate = (daily rate / hours per day) * 1.5, hourly rate = (daily rate / hours per day).
- If the employee's position record hours per day is zero and the job code table has FTE Hours, the following overtime calculation is used: overtime rate = (daily rate / (fte hours / 5) * 1.5, hourly rate = (daily rate / (fte hours / 5).
- If the employee's position record hours per day is zero and the job code table has zero FTE Hours, the following overtime calculation is used: overtime rate = (daily rate / standard hrs) * 1.5, hourly rate = (daily rate / standard hrs).

Move forecast records to next year payroll:

By default, the **Select Pay Frequency** field is set to the year in which the user is logged on, or click ⌄ to select a different pay frequency that you wish to move to next year. This is a required field.

By default, **Update TRS Year Flag** is not selected. Select **Update TRS Year Flag** to update the **TRS Year** field as set on the Staff/Job Pay Data > Job Info tab. The **TRS Year** field is used to indicate those employees whose contract year begins in July or August (nonstandard) and who receive a contract payment before the beginning of the school year.

In the **Select First Pay Date Codes or blank for ALL** field, type the pay date codes, separating multiple pay date codes with a comma but no space (e.g., 1,17,88,A1). Or, click ⋮ to search for pay date codes. Otherwise, leave blank to use all pay date codes.

Select **Include Extra Duty** to include extra duty in the process. If not selected, no extra duty will be processed even if extra duty codes are selected.

In the **Select Extra Duty Codes or blank for ALL** field, type the extra duty codes, separating multiple extra duty codes with a comma but no space (e.g., 08,20,A2,TF). Or, click ⋮ to search for extra duty codes. Otherwise, leave blank to use all extra duty codes.

In the **Select Positions or blank for ALL (Includes ALL billets for selected positions Blank for ALL not processed when Positions/Billets selected)** field, type the position codes, separating multiple position codes with a comma but no space (e.g., PRIN,T187). Or, click ⋮ to search for position codes. Otherwise, leave blank to use all position codes.

In the **Select Positions/Billets or blank for ALL** field, type the position/billet codes, separating multiple position/billet codes with a comma but no space (e.g., PRIN/00001,PRIN/00006). Or, click ⋮ to search for position/billet codes. Otherwise, leave blank to use all position/billet codes.

In the **Select Supplement Positions or blank for ALL (Includes ALL billets for selected supplement positions Blank for ALL not processed when Supplements/Billets selected)** field, type the supplement position codes, separating multiple supplement position codes with a comma but no space (e.g., PRIN,T187). Or, click ⋮ to search for supplement position codes. Otherwise, leave blank to use all supplement position codes.

In the **Select Supplement Positions/Billets or blank for ALL** field, type the supplement position/billet codes, separating multiple supplement position/billet codes with a comma but no space (e.g., PRIN/00001,PRIN/00006). Or, click ⋮ to search for supplement position/billet codes. Otherwise, leave blank to use all supplement position/billet codes.

Click **Execute** to process the selections.

The following reports are available:

- Move Forecast Process Error Listing
- Update NYR Payroll From Forecast by Employee Name
- Update NYR Payroll From Forecast by Campus

The **Select All** button is used to select all reports.

The **Unselect All** button is used to clear all check boxes so that no reports are selected.

Click **Generate Reports**. The system displays the first report selected.

Review the report.

Review the report using the following buttons:

Click First to go to the first page of the report.
Click ◀ to go back one page.
Click ▶ to go forward one page.
Click Last to go to the last page of the report.

The report can be viewed and saved in various file formats.

Click  to save and print the report in PDF format.

Click  to save and print the report in CSV format. (This option is not available for all reports.) When a report is exported to the CSV format, the report headers may not be included.
Click **X** to close the report window. Some reports may have a **Close Report**, **Exit**, or **Cancel** button instead.

Click **Continue** to view the next report, or click **Return** to return to the reports selection page.

Click **Process** to move the forecast records to next year.

Create a backup.

A backup is highly recommended. Click **Yes** to create an export. Otherwise, click **No** to not create the export and continue with the process.

Type a password for the archive, and then click **Continue**. An export spinning wheel is displayed indicating the progress of the export process.
When the export process is completed, the File Download page is displayed.
Select **Save File**, and then click **OK**. The Save As dialog box is displayed. Otherwise, click **Cancel** to close the dialog box.
In the **Save As** field, click ⌄ to navigate to the appropriate folder.
In the **File name** field, the file name is set to dbcccddd_freq_mmddyyyy.rsf, where cccddd is the county-district number and mmddyyyy is the current date.
Click **Save**. Otherwise, click **Cancel** to close the Save As dialog box without saving the file.

After the export process is completed, the actual update is performed. If the update is successful, a message indicating that the update was successfully processed is displayed.

Click **Cancel** to return to the Move Forecast to NYR Payroll page without moving the forecast records to next year.